



# Global and China Natural Rubber Industry Report, 2017-2021

August 2017

## **STUDY GOAL AND OBJECTIVES**

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## **REPORT OBJECTIVES**

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## **METHODOLOGY**

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

In 2016, the global natural rubber output edged up 1.1% year on year to 12.4 million tons, and the consumption rose by 3.8% year on year to 12.6 million tons, indicating the gap of 200,000 tons between supply and demand. In the context of steady growth in rubber demand and underproduction, it is expected that the global natural rubber market will continue to be in short supply in 2017-2021, with the supply and demand gap of about 700,000 tons by 2021.

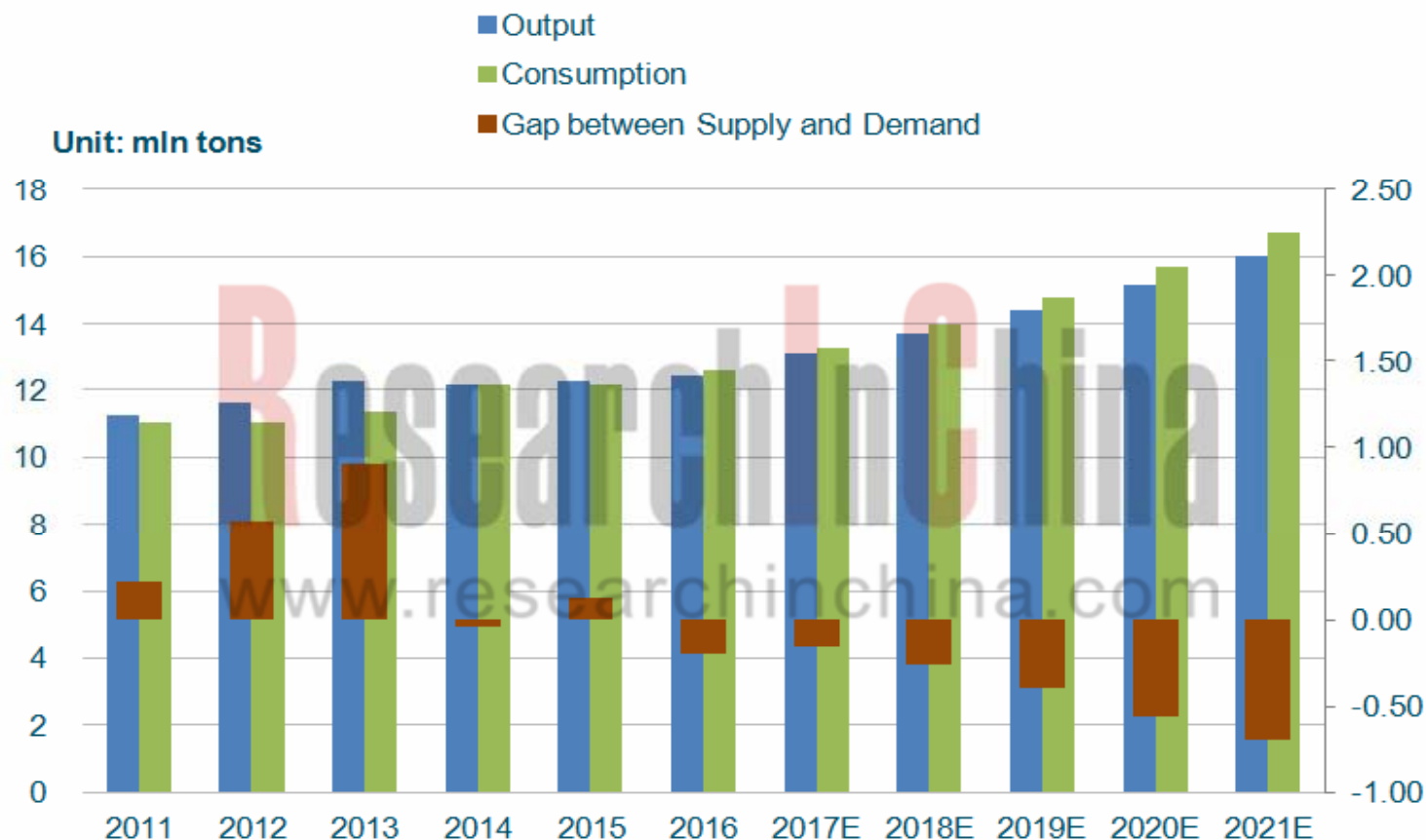
At present, the regional structure of the global natural rubber supply and demand is uneven. Thailand, Indonesia, Malaysia, India, Vietnam and China are the world's top six natural rubber producers, contributing 86.5% to the global total output in 2016; wherein, Thailand ranked first with the output of 4.5 million tons and the share of 36.3% in 2016. In the world, natural rubber is mainly consumed in Asia, Africa, Latin America and other emerging industrialized areas, which enjoyed the share of about 75% in 2016.

China is the world's largest producer of natural rubber, and its consumption in 2016 jumped by 4.6% year on year to 4.896 million tons, of which 77.9% was used for radial tires. Driven by the steady development of the tire industry, China's natural rubber consumption is expected to keep an AAGR of 4.5% during 2017-2021 and hit 5.788 million tons by 2021, of which about 90% will be used in radial tires.

Restricted by natural rubber resources, China produced about 764,000 tons of natural rubber in 2016, accounting for only 6.2% of the global output. By 2021, China may produce 1.079 million tons. Amid the serious imbalance between supply and demand, China saw the gap of about 4.132 million tons in 2016; the gap will reach 4.709 million tons by 2021.

In terms of the price, the natural rubber price bucked the downward trend to rise rapidly from H2 2016 to mid-February 2017 and peaked at RMB20,700 / ton since 2014, thanks to higher market prices of international commodities (crude oil, etc.) and quick demand growth of downstream industries (such as heavy truck tires). Later, the main producer Thailand released its storage for four consecutive times, resulting in accelerated supply; however, the consumption growth remained unchanged, so that the natural rubber price dropped down from late February to the end of June, but rebounded slightly in July. In the next year, the broad market and short supply may boost the natural rubber price to show a slight uptrend.

## Global Supply and Demand of Natural Rubber, 2011-2021E



Source: Global and China Natural Rubber Industry Report, 2017-2021 by ResearchInChina

The world's leading natural rubber manufacturers are mainly distributed in Southeast Asia (Thailand and Singapore, etc.), including Sri Trang Agro-Industry, Von Bundit, Thai Hua Rubber Public, TRUBB, Southland Rubber and Sinochem International; among them, Sri Trang Agro-Industry is the world's largest natural rubber producer, and its sales volume accounted for 11.9% of the global total consumption in 2016.

Chinese natural rubber manufacturers are mainly large-sized agricultural reclamation and rubber groups, represented by Sinochem International, China Hainan Rubber, Guangken Rubber, Yunnan State Farms Group and so on. In recent years, major producers have actively deployed overseas markets and seized more market shares. Sinochem International acquired the Singapore-listed company Halcyon Agri Corporation Limited in 2016 to fulfill a global layout of major natural rubber producing areas in West Africa, Southeast Asia and China; in April 2017, the company established Halcyon Natural Rubber (Shanghai) Co., Ltd. to integrate natural rubber marketing and trade of Sinochem International in China. Guangken Rubber took over Thai Hua Rubber Public Co., Ltd. which is Thailand's third largest natural rubber producer in August 2016. As soon as the acquisition is completed, the company will obtain the natural rubber capacity of 1.5 million tons/a, and surpass Sinochem International to rank first in China by capacity.

Global and China Natural Rubber Industry Report, 2017-2021 by ResearchInChina highlights the following:

- ◆ Supply & demand, regional distribution, prices, competitive landscape and development trends of global natural rubber market;
- ◆ Supply & demand, import & export, regional structure, competitive landscape, development trends of Chinese natural rubber market;
- ◆ Tapping area and planting area of natural rubber in China and around the world;
- ◆ Development of applications of natural rubber in China, such as tyre, rubber belt & hose;
- ◆ Operation and development in China of 5 global natural rubber companies;
- ◆ Operation and development strategies of 5 key Chinese natural rubber companies.

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