



**Global and China Synthetic Rubber (BR,  
SBR, EPR, IIR, NBR, Butadiene, Styrene,  
Rubber Additive) Industry Report,  
2018-2023**

**January 2019**

## **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**

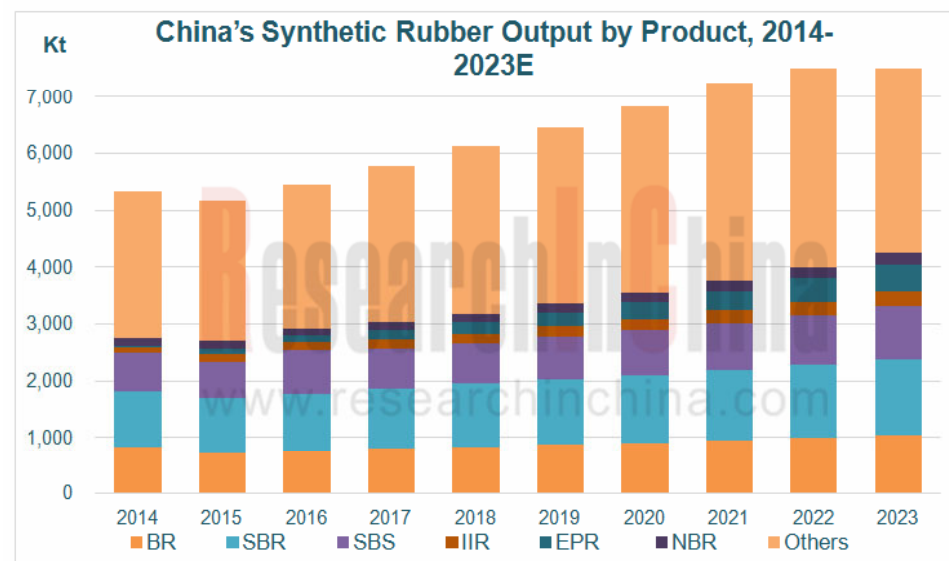
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

In 2018, China boasted a total synthetic rubber capacity of roughly 6,667kt/a, including 130kt/a new effective capacity. Considering capacity adjustment, China's capacity of seven synthetic rubbers (BR, SBR, EPR, IIR, NBR, IR and CR) and styrene block copolymer (SBC) will ranged at estimated 6,870kt/a in 2019, 205kt/a of which will be newly added. But it is still very uncertain that the country's several plants will be put into production as scheduled.

Over the past two years, China's synthetic rubber market sustained steady growth as a pickup in price among other factors prompted some synthetic rubber plants to resume production after being out of operation for years. China's output of synthetic rubber reached 5,787 kt in 2017, up 6.0% from a year ago before climbing to 6,123 kt in 2018, and will expectedly hit 8,110kt in 2023, at a growth rate of around 6% during 2018-2023.

Styrene butadiene rubber (SBR) and butadiene rubber (BR) are the two most common synthetic rubbers in China, with capacity respectively accounting for 32.1% and 25.8% of the country's total synthetic rubber capacity in 2018. With the largest output among main synthetic rubbers, SBR and BR seized a combined 32.4% share of China's total synthetic rubber output in 2017. But their production growth slowed down evidently, while special rubber products like ethylene propylene rubber (EPR) and nitrile butadiene rubber (NBR) began to boom, especially the fastest-growing EPR whose output jumped by 29.5% to 202.6 kt in 2018.



Source: Global and China Synthetic Rubber Industry Report, 2018-2023 by ResearchInChina

In 2018, China's import and export of main synthetic rubbers dropped differently, for example, BR imports and exports fell by 27.1% and 8.5% in the first eleven months of 2018 to 181.6 kt and 31.4 kt from the prior-year period, respectively. Slowing downstream demand was at play in the situation; another cause was the escalating trade tensions between China and America from March 2018: almost all of China's products in the synthetic rubber industry chain were on the list of America's tariffs on USD200 billion of Chinese goods. Although both countries had agreed to suspend tariff increase in late 2018, it still hurt China's imports and exports of synthetic rubber products.

Moreover, Chinese producers tried hard and invested heavily to develop new products in recent years, having made some breakthroughs. Examples include PetroChina's successful commissioning of self-developed high-strength SBR, SSBR2060 in its Dushanzi Refinery in July 2018; PetroChina Jilin Petrochemical Research Institute's accomplishment of optimization test of self-developed high-strength SBR, SBR1566 in November 2018 and its successful development of a new ethylene propylene rubber (EPR), X-0150 in the same month.

Global and China Synthetic Rubber Industry Report, 2018-2023 highlights the following:

- ◆ Global synthetic rubber market (supply and demand, product mix, regional pattern, development trends, etc.);
- ◆ China synthetic rubber market (supply and demand, import and export, product mix, regional pattern, enterprise pattern, development trends, etc.);
- ◆ China synthetic rubber market segments (BR, SBR, IIR, EPR and NBR) (supply and demand, import and export, enterprise pattern, etc.);
- ◆ China synthetic rubber (butadiene, styrene and rubber additive) raw materials market;
- ◆ Global and Chinese synthetic rubber downstream sector (tire);
- ◆ 21 key Chinese synthetic rubber companies (operation, development strategy, etc.).

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