



Global and China Natural Rubber Industry Report, 2019-2025

May 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, global natural rubber industry continued remained at low ebb, as a result of economic fundamentals. Global natural rubber price presented a choppy downtrend and repeatedly hit a record low in recent two years, in spite of an uptick in the middle of 2018, which was not enough to invigorate the sluggish industry. By the end of 2018, the market still hovered at the bottom and showed no signs of recovery. In 2019, global natural rubber price will go on setting all-time lows until 2020 or 2021 when the price may level off and pick up.

In 2018, natural rubber was still in short supply globally, with a gap of around 120kt left to fill, due to China-US trade war, damage by plant diseases and insect pests and micro-economy factor. In the wake of steady growth in demand and insufficient production, the situation that supply falls short of demand will last for another five years before the gap can be narrowed.

China consumes the most natural rubber in the world, or 41% of global total, but its output occupies less than 6% of the total. Critical shortage leads to heavy dependence on imports. Yet in 2018 its imports stopped rising and declined by 7.1% to 2,600kt on an annualized basis, on account of trade tensions between China and the United States and less demand from terminal markets like car and heavy truck. Global top six natural rubber producers including Sri Trang Agro-Industry, Vongbuntit, Thai Hua Rubber Public, Thai Rubber Latex Corporation (Thailand) Public Co., Ltd. (TRUBB), Southland Rubber and Sinochem International Corporation, sit in the Southeast Asian countries such as Thailand and Singapore, because of climate and so forth. Among them, Sri Trang Agro-Industry is the largest player commanding roughly 12% of global market.

Chinese natural rubber producers are mostly large plantations and rubber corporations. Typical companies include Sinochem International Corporation, China Hainan Rubber Industry Group Co., Ltd., Guangdong Guangken Rubber Group Co., Ltd. and Yunnan State Farms Group Co., Ltd..

The report 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.

Capacity of Global and Chinese Natural Rubber Manufacturers, 2018



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