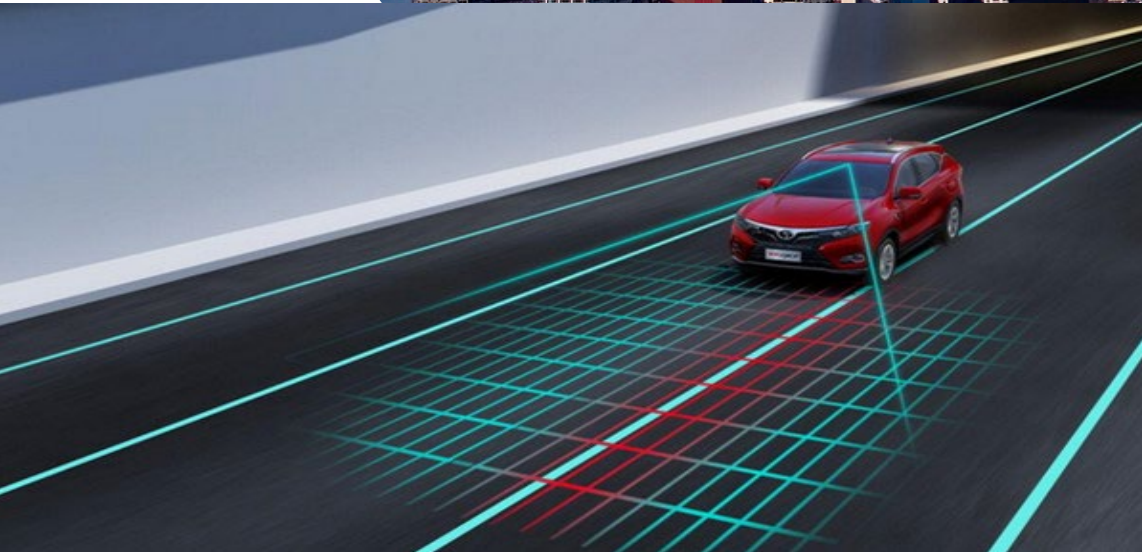




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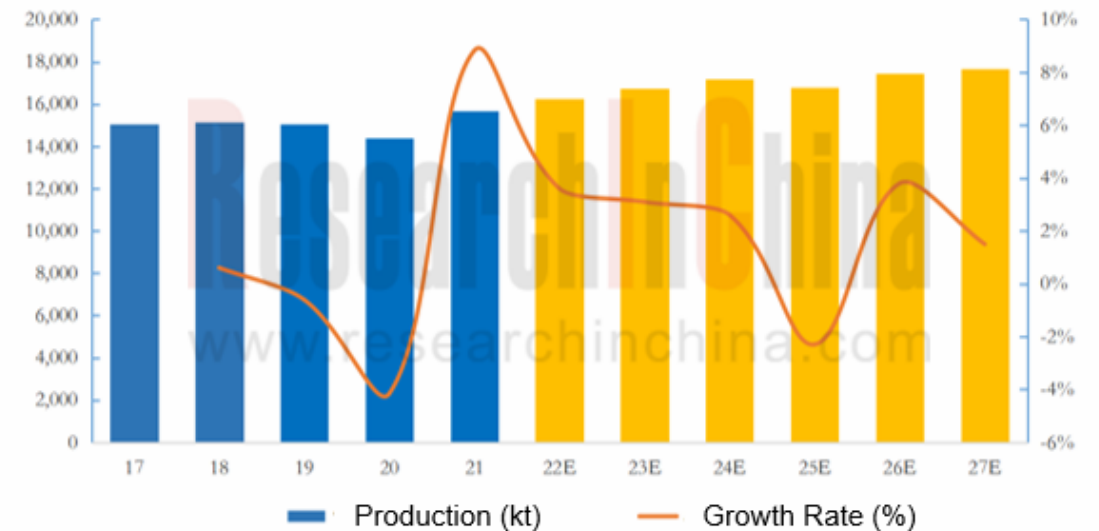
Global and China Synthetic Rubber Industry Report, 2021-2027

Mar.2022

Synthetic rubber is a polymer product made of coal, petroleum and natural gas as main raw materials and polymerized with dienes and olefins as monomers, which is typically divided into general synthetic rubber and special synthetic rubber. The seven categories have been utilized most for industrial purposes, including SBR, BR, CR, NBR, EPR, IIR and IR. Merited by high elasticity, insulation, air tightness, oil resistance, low/high temperature resistance and other properties, synthetic rubbers found wide application in industrial production, agriculture, national defense, transportation and people's daily life.

Impacted by COVID-19, global economies suffer setbacks, so does the market of synthetic rubber whose production and sales registered 14,413 kt and 14,223 kt respectively in 2020, down 4.2% and 6.1% on an annualized basis. As the Pandemic gets eased, global synthetic rubber production and consumption will rebound steadily from 2022 to 2024, and then show fluctuations, with still an anticipated balance between supply and demand. Till 2027, production and consumption of synthetic rubbers will hopefully reach 17,690 kt million tons and 17,630 kt respectively.

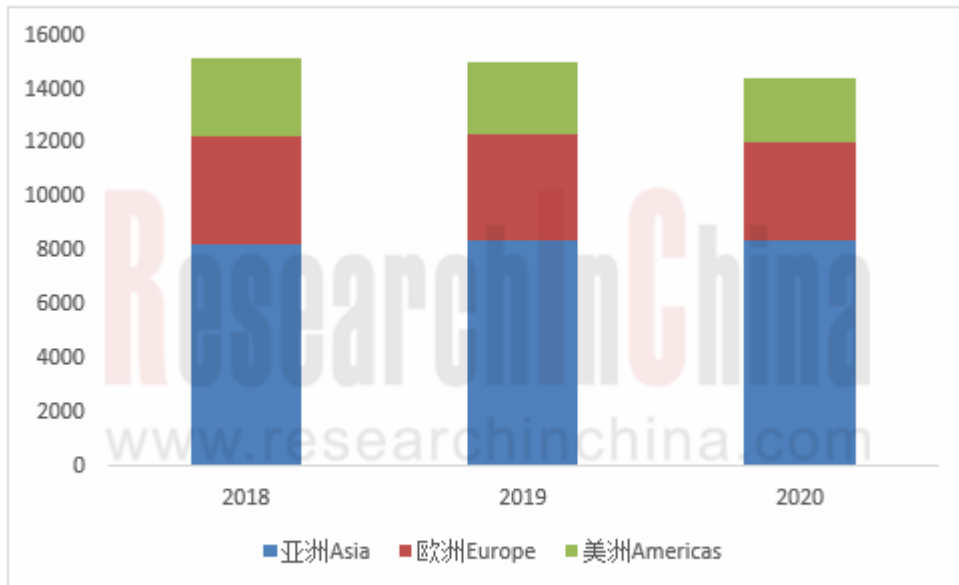
Global Production of Synthetic Rubber, 2017-2027E



Production of Synthetic Rubber

Asia is the largest synthetic rubber production and consumption region around the globe, where synthetic rubber production and demand in 2020 were 8.365 million tons and 8.5 million tons separately, holding approximately 58.0% and 60.0% of global production and demand, while synthetic rubber production and demand in Europe were 3,645 kt and 3,160 kt separately as a percentage of about 25.3% and 22.2% of global total respectively. Synthetic rubber production and demand in the Americas were 2,403 kt and 2,420 kt, commanding about 16.7% and 17.0% of global total, respectively.

Global Synthetic Rubber Production by Region, 2018-2020

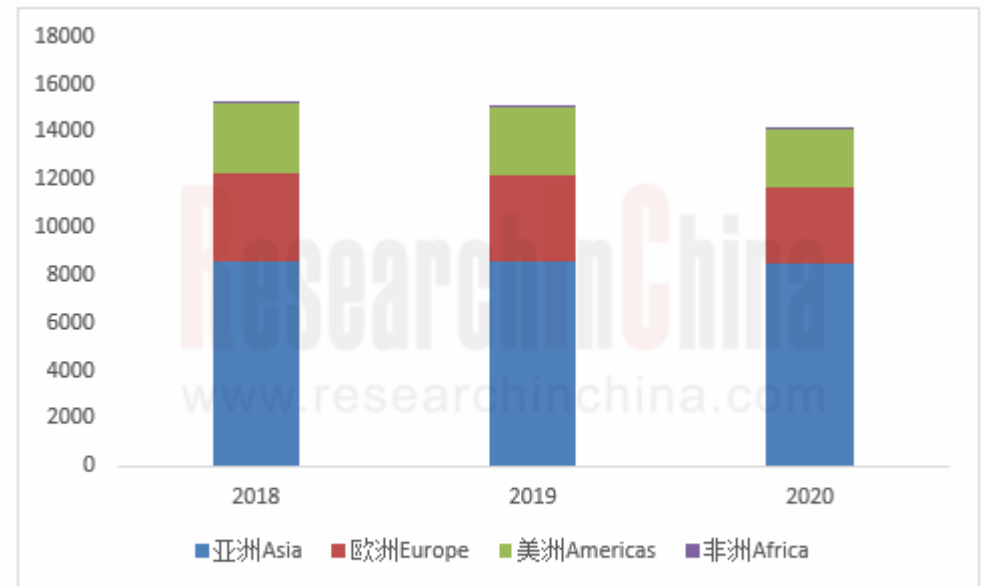


Unit: Kt

Source: IRSG; ResearchInChina

Demand of Synthetic Rubber

Global Synthetic Rubber Demand by Region, 2018-2020



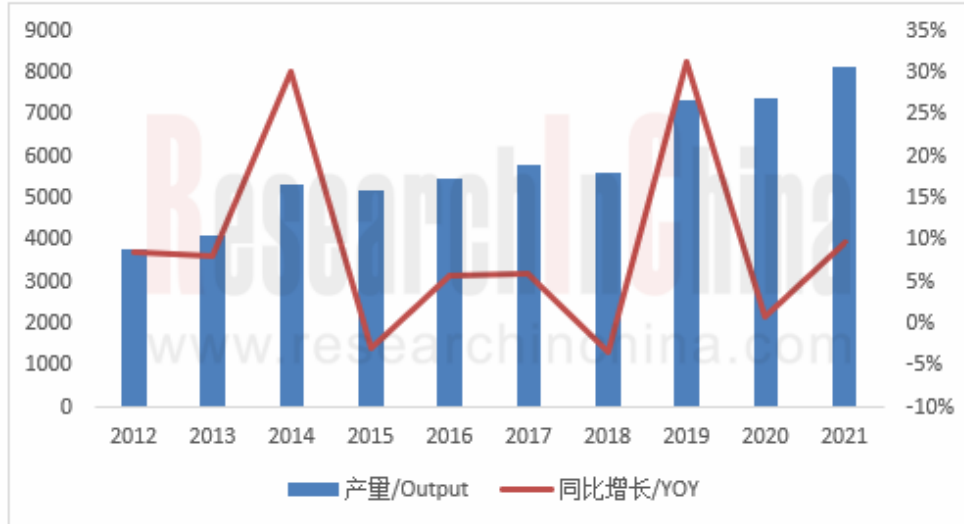
Unit: Kt

Source: IRSG; ResearchInChina

Output of Synthetic Rubber

China is the world's largest producer and consumer of synthetic rubber, with production up 9.7% year on year to 8,117 kt in 2021.

Output of Synthetic Rubber and YoY Change in China, 2012-2021



Unit: Kt

Source: NBS; ResearchInChina

Despite the sizable production at home, Chinese synthetic rubber still cannot meet the market demand, with heavy reliance on imports. In 2020, China imported around 7,114 kt of synthetic rubbers and exported roughly 446 kt, indicating the net import up to 6,668 kt.

The Chinese synthetic rubber market tends to be highly market-oriented and intensely competitive among enterprises. Participants in the industry include both large state-owned enterprises such as Sinopec and CNPC, as well as SMEs like Blue Star New Chemical Material, Tianli High&Newtech, Qixiang Tengda and Zhejiang Longsheng. In 2020, the synthetic rubber output of Sinopec and CNPC reached 1,067 kt and 1,001 kt respectively, with market shares of 14.4% and 13.5% (by production).

Highlights

Global and Chinese Synthetic Rubber Industry Report, 2021-2027 highlights the following:

- Global synthetic rubber market supply and demand, product structure, regional structure, development trend, etc.
- China synthetic rubber market supply and demand, import and export, product structure, regional structure, enterprises layout, development trend, etc.
- Supply and demand, import and export, enterprises layout of major market segments of Chinese synthetic rubbers that include BR, SBR, IIR, EPR and NBR.
- Market development of main raw materials for synthetic rubber such as butadiene, styrene and rubber additives in China.
- Global and Chinese market growth of tires (main consumer of synthetic rubber), etc.
- 19 key synthetic rubber companies in China (business, development strategies, etc.)

Table of Content

1. Synthetic Rubber

- 1.1 Definition
- 1.2 Classification
- 1.3 Industrial Chain

2. Global Synthetic Rubber Industry

- 2.1 Overview
- 2.2 Market Supply and Demand
- 2.3 Regional Structure
- 2.4 Development Trends

3. China Synthetic Rubber Industry

- 3.1 Market Supply and Demand
 - 3.1.1 Supply
 - 3.1.2 Demand
- 3.2 Import and Export
 - 3.2.1 Import
 - 3.2.2 Export
- 3.3 Product Structure
- 3.4 Regional Distribution
- 3.5 Enterprise Layout
- 3.6 Development Trend

4. Major Synthetic Rubber Market Segments in China

- 4.1 BR
 - 4.1.1 Market Supply
 - 4.1.2 Import and Export
 - 4.1.3 Market Demand
 - 4.1.4 Competition
 - 4.1.5 Price

4.2 SBR

- 4.2.1 Market Supply
- 4.2.2 Import and Export
- 4.2.3 Market Demand
- 4.2.4 Competition

4.2.5 Price

4.3 EPR

- 4.3.1 Market Supply
- 4.3.2 Import and Export
- 4.3.3 Market Demand
- 4.3.4 Competition

4.3.5 Price

4.4 IIR

- 4.4.1 Market Supply
- 4.4.2 Import and Export
- 4.4.3 Market Demand
- 4.4.4 Competition

4.4.5 Price

4.5 NBR

- 4.5.1 Market Supply
- 4.5.2 Import and Export
- 4.5.3 Market Demand
- 4.5.4 Competition

4.5.5 Price

5. Upstream of Synthetic Rubber in China

5.1 Butadiene

- 5.1.1 Market Supply
- 5.1.2 Import and Export
- 5.1.3 Market Demand
- 5.1.4 Price
- 5.1.5 Competition

Table of Content

5.2 Styrene

- 5.2.1 Market Supply
 - 5.2.2 Import and Export
 - 5.2.3 Market Demand
 - 5.2.4 Price
 - 5.2.5 Competition
- ## 5.3 Rubber Additives
- 5.3.1 Market Supply and Demand
 - 5.3.2 Prices
 - 5.3.3 Competition

6. Tire Market

- 6.1 Global Market
- 6.2 China Market

7. Major Chinese Synthetic Rubber Manufacturers

- 7.1 Sinopec
 - 7.1.1 Profile
 - 7.1.2 Business
 - 7.1.3 Synthetic Rubber Business
 - 7.1.4 Yangzi Petrochemical
 - 7.1.5 Yanshan Petrochemical
 - 7.1.6 Qilu Petrochemical
 - 7.1.7 Maoming Petrochemical
 - 7.1.8 Baling Petrochemical
 - 7.1.9 Gaoqiao Petrochemical
- 7.2 China National Petroleum Corporation (CNPC)
 - 7.2.1 Profile
 - 7.2.2 Business
 - 7.2.3 Synthetic Rubber Business
 - 7.2.4 Lanzhou Petrochemical
 - 7.2.5 Jilin Petrochemical

- 7.2.6 Daqing Petrochemical
- 7.2.7 Dushanzi Petrochemical
- 7.2.8 Jinzhou Petrochemical
- 7.2.9 Fushun Petrochemical
- 7.2.10 Sichuan Petrochemical
- 7.3 Shandong Yuhuang Chemical
 - 7.3.1 Profile
 - 7.3.2 Synthetic Rubber Business
- 7.4 TSRC
 - 7.4.1 Profile
 - 7.4.2 Business
 - 7.4.3 Synthetic Rubber Business
- 7.5 Xinjiang Lande Fine Petrochemical
- 7.6 NANTEX Industry
 - 7.6.1 Profile
 - 7.6.2 Business
- 7.7 Other Companies
 - 7.7.1 Shanghai Gaoqiao BASF Dispersions (SGBD)
 - 7.7.2 Shanxi Synthetic Rubber Group
 - 7.7.3 Dow (Zhangjiagang)
 - 7.7.4 Bridgestone (Huizhou) Synthetic Rubber (formerly Bridgestone (Huizhou))
 - 7.7.5 Yibang Rubber
 - 7.7.6 Tianjin Lugang Petroleum Rubber
 - 7.7.7 Fujian Fuxiang Chemical
 - 7.7.8 Zhejiang Cenway New Materials
 - 7.7.9 Chongqing Changshou Chemical
 - 7.7.10 Panjin Heyun New Materials
 - 7.7.11 Fushun YIKESI New Materials
 - 7.7.12 Ningbo Shunze Rubber
 - 7.7.13 Shandong Jusage Technology

Selected Charts

Performance and Application of Synthetic Rubber (by Category)
Synthetic Rubber Industry Chain
Global Output and Consumption of Synthetic Rubber, 2014-2020
Global Synthetic Rubber Output and Consumption Percentages, 2012-2020
Global Output of Synthetic Rubber (by Region), 2018-2020
Global Consumption of Synthetic Rubber (by Region), 2018-2020
Global Output and Consumption of Synthetic Rubber, 2020-2027E
China's Output of Synthetic Rubber and YoY Change, 2012-2021
Apparent Consumption and Self-sufficiency of Synthetic Rubber in China, 2012-2020
Import Volume of Synthetic Rubber and YoY Change in China, 2012-2020
Import Value of Synthetic Rubber and YoY Change in China, 2012-2020
Export Volume of Synthetic Rubber and YoY Change in China, 2012-2020
Export Value of Synthetic Rubber and YoY Change in China, 2012-2020
Synthetic Rubber Capacities (by Product) in China, 2020
Synthetic Rubber Capacity Distribution (by Region) in China, 2021
Main Provinces/Cities Developing Synthetic Rubber in China
Synthetic Rubber Market Concentration (CR2) in China, 2015-2020
Balance between Production of and Demand for Synthetic Rubber in China, 2015-2027E
BR Capacities and YoY Change in China, 2012-2020
BR Output and YoY Change in China, 2012-2020
BR Import Volume and YoY Change in China, 2014-2020
BR Export Volume and YoY Change in China, 2014-2020
Apparent Consumption and Self-sufficiency of BR in China, 2014-2020
BR Demand Structure (by Purpose) in China, 2020
BR Capacity Distribution in China, 2020
BR Capacities (by Manufacturer) in China, 2021
Price Trend of BR, 2016-2022
SBR Output and YoY Change in China, 2014-2020
SBR Import Volume and YoY Change in China, 2015-2020
SBR Import Value and YoY Change in China, 2015-2020
SBR Export Volume and YoY Change in China, 2015-2020
SBR Export Value and YoY Change in China, 2015-2020
Apparent Consumption and Self-sufficiency of SBR in China, 2015-2020

Selected Charts

SBR Demand Structure (by Purpose) in China, 2020
SBR Market Shares of Manufacturers (by Capacity) in China, 2021
Price Trend of SBR in China, 2019-2021
Global EPR Capacity Distribution (by Region), 2020
EPR Output and YoY Change in China, 2014-2020
EPR Capacity and Capacity Utilization in China, 2014-2020
EPR Import Volume and YoY Change in China, 2014-2020
EPR Import Value and YoY Change in China, 2015-2020
EPR Export Volume and YoY Change in China, 2014-2020
EPR Export Value and YoY Change in China, 2015-2020
Apparent Consumption and Self-sufficiency of EPR in China, 2014-2020
EPR Demand Structure (by Purpose) in China, 2020
EPR Capacity Distribution (by Manufacturer) in China, 2020
Average Market Price of EPDM in China, 2012-2021
IIR Capacity and Output in China, 2016-2020
IIR Output and YoY Change in China, 2014-2020
IIR Import Volume and YoY Change in China, 2014-2020
IIR Import Value and YoY Change in China, 2015-2020
IIR Export Volume and YoY Change in China, 2014-2020
IIR Export Value and YoY Change in China, 2015-2020
Apparent Consumption and Self-sufficiency of IIR in China, 2014-2020
IIR Demand Structure (by Purpose) in China, 2020
IIR Capacity Distribution (by Manufacturer) in China, 2021
IIR Price Trend in China, 2021-2022
NBR Capacity and Capacity Utilization in China, 2014-2020
NBR Output and YoY Change in China, 2014-2020
NBR Import Volume and YoY Change in China, 2014-2020
NBR Import Value and YoY Change in China, 2015-2020
NBR Export Volume and YoY Change in China, 2014-2020
NBR Export Value and YoY Change in China, 2015-2020
Apparent Consumption and Self-sufficiency of NBR in China, 2014-2020
NBR Demand Structure (by Purpose) in China, 2020
NBR Capacity Structure (by Manufacturer) in China, 2020

Selected Charts

NBR Price Trend in China, 2019-2021
Butadiene Capacity and Capacity Utilization in China, 2014-2021
Butadiene Output and YoY Change in China, 2014-2021
Shares of Butadiene Manufacturing Processes in China
Butadiene Import Value and YoY Change in China, 2014-2020
Butadiene Import Volume and YoY Change in China, 2014-2020
Butadiene Export Volume and YoY Change in China, 2014-2020
Butadiene Export Value and YoY Change in China, 2014-2020
Apparent Consumption and Self-sufficiency of Butadiene in China, 2014-2020
Structure of Butadiene Consumption in 2020
Butadiene Market Price in China, 2017-2021
Global Butadiene Capacity Structure (by Manufacturer) in 2020
Butadiene Capacity Distribution (by Manufacturer) in China, 2020
Styrene Capacity, Output and Operating Rate in China, 2009-2021
Styrene Capacity Distribution (by Region) in China, 2020
Styrene Import Volume and YoY Change in China, 2014-2020
Styrene Import Value and YoY Change in China, 2014-2020
Styrene Export Volume and YoY Change in China, 2014-2020
Styrene Export Value and YoY Change in China, 2014-2020
Styrene Import Value Structure (by Country/Region) in China, 2020
Apparent Consumption and Self-sufficiency of Styrene in China, 2014-2020
Styrene Demand Structure (by Purpose) in China, 2020
Average Market Price of Styrene in China, 2016-2021
Styrene Capacity Distribution (by Manufacturer) in China, 2020
Ongoing/Proposed Styrene Projects in China, 2021-2023
Output of Rubber Additives and YoY Change in China, 2013-2020
Output of Rubber Additives (by Product) in China, 2020
Revenue and Output Value of Rubber Additives in China, 2015-2020
Export Volume and Value of Rubber Additives in China, 2015-2020
Price Trend of Rubber Additives in China, 2018-2022
Concentration of Rubber Additives Market in China, 2019-2020
Cost Structure of Tire in China
Global Tire Market Size, 2014-2021

Selected Charts

Global Tire Replacement Market Share, 2015-2021
Output of Automotive Tires in China, 2012-2021
Operating Rates of Chinese Tire Manufacturers, 2021-2021
Tire Output of Some Chinese Manufacturers in 2020
Tire Sales Volume of Some Chinese Manufacturers in 2020
Revenue and YoY Change of Sinopec, 2014-2021
Net Income and YoY Change of Sinopec, 2014-2021
Sinopec's Revenue (by Sector), 2019-2021
Sinopec's Gross Margin (by Sector), 2014-2021
Sinopec's Output of Synthetic Rubber and YoY Change, 2014-2021
Sinopec's Sales Volume of Synthetic Rubber and YoY Change, 2014-2021
Sinopec's Revenue from Synthetic Rubber and YoY Change, 2014-2021
Major Rubber Products and Capacities of Yangzi Petrochemical Rubber
SBR Products of Qilu Petrochemical
BR Products of Qilu Petrochemical
Major Synthetic Rubber Products of Maoming Petrochemical
Revenue and YoY Change of CNPC, 2014-2021
Net Income and YoY Change of CNPC, 2014-2021
CNPC's Revenue (by Sector), 2018-2021
CNPC's Revenue (by Region), 2014-2021
CNPC's Gross Margin (by Sector), 2014-2021
CNPC's Output of Synthetic Rubber and YoY Change, 2014-2021
Presence of Major Subsidiaries under Shandong Yuhuang Chemical
Presence of Subsidiaries under TSRC, 2020
Revenue and Net Income of TSRC, 2014-2021
Revenue Structure of TSRC (by Product), 2019-2021
Revenue Breakdown of TSRC (by Region), 2019-2020
Capacities, Output and Output Value of TSRC (by Product), 2019-2020
Synthetic Rubber Capacity Utilization of TSRC, 2013-2020
TSRC's Revenue from Synthetic Rubber (by Region), 2019-2020
Revenue of TSRC (Nantong), 2019-2020
Capacity Distribution of NANTEX Industry (by Product)
NANTEX Industry's Revenue from Mainland China, 2019-2020



Beijing Headquarters

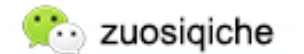
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