

## Research Report On China's Natural Rubber Market

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According to the latest statistical data from IRSG, the global consumption of natural rubber has been increased by 300000-400000 ton/year since the year 2000, except a small declination in 2001. Among the biggest consuming countries, the consumption levels of US and Japan are steady, India is keeping mini-increasing, however, the lightspot of natural rubber consumption is China. According to Ministry of Agriculture and other related departments, China's natural rubber consumption has surpassed US for the first time in 2001, becoming the first biggest consumption country and import country. Nowadays, China's economy keeping growing, the production of main rubber products like tyre, rubber shoes are showing a high-level operation state, which promotes the whole rubber industry coming into a steady and fast developing stage. The number of domestic enterprises possessing a certain size has reached 3353, and the whole consumption income is about 266,834 million yuan, increasing by 24.44%.

Limited by natural conditions, China's natural rubber plantation is mainly in Hainan, Yunnan, Guangzhou, Guangxi and Fujian. According to the data from Ministry of Agriculture, the output of domestic natural rubber is 538,000 tons, among which the output of Hainan and Yunnan together is 511,700 tons, nearly 95.12% of the whole domestic output. However, according to the Association of National Natural Rubber, the domestic consumption of natural rubber has reached about 2,130,000 tons, which shows the 75% domestic consumption is totally depends on import abroad -- a quite high foreign dependence.

In recent years since 2002, the import sum of China's natural rubber retains a yearly increasing about 45.87%, and continually improving its previous records. In 2006, China imported natural rubber products about \$3030 million, having increased by \$1175 million compared with the year 2005, an increasing rate of 63.37%, 4.37 times of the import sum of the year 2002. The total amount of China's import rubber products is keeping a steady increase in 4 years in a row. According to the latest data from the customs, China has spent \$4426 million in importing rubber products from Jan. 2007 to Oct. 2007, increasing 8.67% compared with the same period of 2006.

China imports natural rubber products mainly from Thailand, Malaysia, Indonesia, Vietnam, India, etc. In 2006, China spent \$1198 million in importing natural rubber products from Thailand. This sum is the biggest one among the whole nation's import expenditure, nearly 39.54%. The natural rubber products imported from Malaysia cost \$850 million, occupying the 2nd place, nearly 28.03%. And also China cost \$680 million on importing from Indonesia, 3rd place, almost 22.45%. Therefore, Thailand, Malaysia, Indonesia are the mainest source countries for China to import natural rubber products. In 2006, China spent \$2728 million in importing natural rubber products from these three countries, occupying almost 90.02% among the total import sum.

Among domestic natural rubber products consumption market, tyres occupy a leading place, and 80% natural rubber is used for tyre-making industry. According to the information provided by China Rubber Industry Association, today China's tyre market has the fastest increasing speed in the world, whose market scale is worth \$8000 million, almost 9% portion of world tyre market.

Today, domestic automotive industry develops fast, international tyre tycoons invest more, consumption tax of diagonal tyre falls off, and the nation has issued encouragement policies. Therefore, the demands for imported rubber products, which are made mainly by natural rubber, would be increasing fast in quite a long time in future. Natural rubber has already become China's tight strategic source. The domestic self supply of natural rubber has declined down to 1/3 strategic security line. Analysizing China's rubber

products current situation, domestic natural rubber could not gain a sudden increasing output in a short period because of the limitation of plantation conditions. The rise rate is expected to be 1.5%-2.5%, and the output in 2010 could be 780,000 tons. There is still a far distance for self supply to catch up with domestic fast increase and we can only solve this problem by enlarging importing rubber products abroad. Therefore, we estimate that the natural rubber import would be keeping an annual increase rate of 10%-16% from 2007 to 2010.

In 2003, Commerce Department and National Maritime Customs Administration together issued No.63 Announcement which said the import quota permit managements of natural rubber and autotyres were cancelled. From that on, China's import quota management of natural rubber were all cancelled and trade could be done freely if only it agree with relevant inspection and quarantine act. Currently, importing rubber products is in fully free competition situation on Chinese market, besides strengthening import monitor and carrying out automatic import permit for natural rubber products.

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