

Global and China Natural Rubber Industry Report, 2014-2018

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Abstracts

Due to substantial decline in global natural rubber prices, the world's natural rubber output fell by 1.5% from a year earlier to 12.07 million tons in 2014. Over the same period, global consumption of natural rubber saw a year-on-year growth of 6.8% to 12.16 million tons, destocking 89 kt, largely driven by continuous expansion of global tire industry.

Global natural rubber consumer markets are primarily concentrated in China, India, Europe, Japan, etc. China is the world's largest consumer of natural rubber, guzzling 4,760 kt in 2014, representing a year-on-year rise of 13.1%, making up 39.1% of the world's total consumption. Pulled by the demand from automobile and tire industries in China, natural rubber consumption will continue to grow and is expected to reach 6,791 kt by 2018.

However, limited by unfavorable weather conditions, the output of natural rubber in China is rather low, only 857 kt in 2014, or 7.1% of the global total. In order to meet supply-demand gap, China has to import a large amount of natural rubber from Thailand, Indonesia and Malaysia, with imports reaching 2,610 kt in 2014, 54.8% of total consumption that year.

At present, Sri Trang Agro-Industry Plc., Von Bundit and Thai Hua Rubber are major global natural rubber producers. They have, by virtue of their resource advantages, continued to boost planting and production capacity.

Von Bundit is the company with the largest natural rubber capacity in the world. It has production bases in Thailand, Singapore, etc. By the end of 2014, the company boasted annual capacity of 1,650 kt.

Sri Trang Agro-Industry Plc. is the world's second largest natural rubber producer. By the end of 2014, it had set up 26 plants in Thailand and Malaysia, totaling a capacity of 1,400 kt/a. The company's processing plant in Burma will go into production at the end of 2015, then adding natural rubber capacity of 100 kt/a.

Meanwhile, major Chinese natural rubber producers, including Sinochem International, Guangdong Guangken Rubber Group and China Hainan Rubber Industry Group, are actively developing new products and speeding up the implementation of "going out" strategy.

Sinochem International Corporation is the largest supplier of natural rubber in China. By the end of 2014, the company had 23 processing plants in 8 main rubber producing countries with total annual capacity of 730 kt, including a capacity of 36 kt/a added in Africa.

China Hainan Rubber Industry Group Co., Ltd. is the largest natural rubber producer in China. As of the end of 2014, the company had the planting area of 3.53 million mu (1mu equals to about 1/15 hectare). In Jul 2015, the natural rubber material for domestic military aircraft tire jointly developed by the company and Shuguang Rubber Industry Research and Design Institute of China National Tire Rubber Corporation passed technical evaluation, breaking monopoly of imported high-end products in military aircraft tire in China.

Guangdong Guangken Rubber Group Co., Ltd. began to expand its overseas business from 2004. In May 2015, the company added 1,500 hectares of rubber planting area with operation period of 60 years, further expanding its natural rubber planting territory.

Global and China Natural Rubber Industry Report, 2014-2018 by ResearchInChina highlights:

Supply & demand, regional distribution, prices, development trends of global natural rubber market;

Supply & demand, import & export, 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 rubber belt & hose;

Operation and development in China of 5 global natural rubber companies;

Operation and development strategy of 5 key Chinese natural rubber companies.

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