

China's Synthetic Rubber Industry Research, 2013-2017

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Abstracts

Since the 21st century, automobile industry and tire industry have developed rapidly in China, which promotes the demand for rubber in return. In 2012, the output volume of automobiles reached 19.27 million units and that of radial tires totaled 460 million, ranking the first in the world. During 2001-2012, the CAGR of automobile output volume exceeded 20% and the CAGR of tire output volume reached 25%, both ranking top in the world. In 2012, the consumption volume of natural rubber in China accounted for over 1/3 of the global consumption volume with foreign dependence degree exceeding 80%. Since 2001, China has become the largest importer of natural rubber in the world. Natural rubber resource is insufficient in China, which provides market opportunities for developing synthetic rubber industry. In China, the synthetic rubber demand of its downstream industries is strong, so synthetic rubber industry develops at high speed.

Synthetic rubber refers to any artificial macromolecule materials that applied as elastomer. Synthetic rubber is a kind of synthetic polymer with high elasticity that mainly made from coal, petroleum and natural gas, so its price is closely related to prices of the three major raw materials. Synthetic rubber has various types with special functions to meet different demands. As a result, the global output volume of synthetic rubber has exceeded that of natural rubber.

In recent years, the production capacity of synthetic rubber develops rapidly in China. By the end of 2012, the production capacity of synthetic rubber exceeded 4 million tons and its output volume reached 3.787 million tons. Meanwhile, there were more than twenty synthetic rubber enterprises in China. Thanks to their fully furnished devices and abundant raw materials, Sinopec and CNPC became the two leading synthetic rubber enterprises in China with the total production capacity accounting for over half of the national production capacity.

Stimulated by the great market demand for synthetic rubber and some supportive policies, many private enterprises and foreign-funded enterprises begin to engage in occupying China synthetic rubber market. There are some examples: in January 2012, both the butadiene rubber device and styrene butadiene rubber device both with the annual production capacity of 100,000 tons established by Shandong Huamao New Materials Co., Ltd. were put into operation; in May 2012, NBR device with the annual production capacity of 30,000 tons established by TSRC Corporation and LANXESS was put into operation and the total annual synthetic rubber production capacity (including BR, SBR, NBR and SBS) of TSRC Corporation reached 302,000 tons.

In addition, the butadiene rubber nickel device with the annual production capacity of 50,000 tons established by Shandong Shouguang Junteng Co., Ltd., the butadiene rubber project with the annual production capacity of 100,000 tons established by Zhejiang Transfar Group and the polymerization styrene butadiene rubber project with the annual production capacity of 100,000 tons, established by Liaoning North Daina Suo Co., Ltd. respectively are planned to be put into production by the end of 2014. By the end of 2015, the new annual production capacity will reach 2.239 million tons.

In the second half of 2012, the production capacity of synthetic rubber increased greatly in China, among which the production capacities of butadiene rubber and styrene butadiene rubber increased by 360,000 tons and 280,000 tons respectively. By the end of 2012, the total production capacities of butadiene rubber and styrene butadiene rubber reached 1.325 million tons and 1.592 tons respectively. Meanwhile, the annual domestic production capacity of synthetic rubber was 4.67 million tons, increasing by 1.14 million tons within the year.

In 2013, the production capacity of synthetic rubber keep increasing in China, among which the annual production capacities of butadiene rubber and styrene butadiene rubber increased by 400,000 tons and 150,000 tons respectively. Considering raw material supply, downstream demand and new-added production capacity, it is predicted that the output volumes of the above two rubber types will reach 1.36 million tons and 920,000 tons respectively in 2013, increasing by 15.3% and 19% over 2012 respectively. However, the utilization rate of devices will decline.

It is predicted that China's demand for synthetic rubber will keep increasing at equal or lower growth rate over 2012.

Promoted by automobile industry and export, the demand for styrene butadiene rubber

will recover in China. Meanwhile, influenced by the increasing production capacity and lowering device utilization rate, the net import volume of styrene butadiene rubber will keep declining, among which the import volume of ESBR will decrease while that of SSBR will keep increasing.

Promoted by commercial vehicle market, it is predicted that the demand for butadiene rubber will increase a little faster than that for styrene butadiene rubber. However, due to the sharp increase of production capacity, the utilization rate of devices will decline in return. It is predicted that the net import of butadiene rubber will decrease sharply and butadiene rubber products will still be the major import item.

Though the supply capacity of synthetic rubber increases rapidly, the demand for butadiene will be influenced by the decreasing utilization rate of devices. It is predicted that the supply and demand of butadiene will be basically balanced in China and its price is likely to fall instead of rising, so its restriction on synthetic rubber will decline.

Along with the growing economy and urbanization level in China, the demand for auto accessories and building materials will be promoted sharply, which will promote the demand for synthetic rubber in return. It is predicted that the annual output volume of synthetic rubber will keep increasing in 2013-2017.

Through this report, the readers can acquire the following information:

Production Capacity and Output Volume of Synthetic Rubber Industry and Its Sub-industries in China

Downstream Demand of Synthetic Rubber in China

Import and Export of Synthetic Rubber in China

Forecast on China Synthesize Rubber Industry

The Following Enterprises and People are Recommended to Purchase This Report:

Synthetic Rubber Manufacturing Enterprises

Downstream Synthetic Rubber Enterprises (e.g. Auto Accessory Enterprises)

Rubber Trade Enterprises

Investors and Research Institutes Concerned About Synthetic Rubber Industry

Contents

1 BASIC CONCEPT OF SYNTHETIC RUBBER

- 1.1 Synthetic Rubber Definition
- 1.2 Synthetic Rubber Classification

2 SYNTHETIC RUBBER SUPPLY IN CHINA, 2008-2012

- 2.1 Synthetic Rubber Industry Chain
- 2.2 Production Capacity and Output Volume of Synthetic Rubber in China, 2008-2012
 - 2.2.1 Production Capacity
 - 2.2.2 Output Volume
 - 2.2.3 China Output Volume of Synthetic Rubber by Region, 2012

3 MARKET DEMAND FOR SYNTHETIC RUBBER IN CHINA, 2008-2012

- 3.1 Overview on Synthetic Rubber Demand in China
- 3.2 Demand of Automobile Industry for Synthetic Rubber
- 3.3 Demand of Other Industries for Synthetic Rubber

4 IMPORT AND EXPORT OF SYNTHETIC RUBBER IN CHINA, 2008-2012

- 4.1 Synthetic Rubber Export
- 4.2 Synthetic Rubber Import

5 SUPPLY AND DEMAND OF MAJOR SYNTHETIC RUBBER TYPES IN CHINA, 2008-2012

- 5.1 Styrene Butadiene Rubber (SBR)
 - 5.1.1 Production Status of Major SBR Manufacturing Enterprises
 - 5.1.2 SBR Demand
 - 5.1.3 SBR Price Trend, 2001-2012
- 5.2 Butadiene Rubber (BR)
 - 5.2.1 Production Status of Major BR Manufacturing Enterprises
 - 5.2.2 BR Demand
 - 5.2.3 BR Price
- 5.3 Isobutylene-isoprene Rubber (IIR)
 - 5.3.1 Production Status of Major IIR Manufacturing Enterprises

5.3.2 IIR Demand

5.3.3 IIR Price

5.4 Ethylene Propylene Rubber (EPR)

5. 4.1 PRODUCTION STATUS OF MAJOR EPR MANUFACTURING ENTERPRISES

5.4.2 EPR Demand

5.4.3 EPR Price Trend

5.5 Chloroprene Rubber (CR)

5. 5.1 PRODUCTION STATUS OF MAJOR CR MANUFACTURING ENTERPRISES

5.5.2 CR Demand

5. 5.3 CR PRICE TREND, 2008-2012

5.6 Nitrile Butadiene Rubber (NBR)

5. 6.1 PRODUCTION STATUS OF MAJOR NBR MANUFACTURING ENTERPRISES

5.6.2 NBR Demand

5.6.3 NBR Price in China, 2008-2012

5.7 Isoprene Rubber (IR)

5.8 Styrenic Thermoplastic Elastomer (SBCs)

6 FORECAST ON CHINA SYNTHESIZE RUBBER INDUSTRY, 2013-2017

6.1 Influencing Factors on Development

6.2 Supply Forecast

6.3 Demand Forecast

Selected Charts

SELECTED CHARTS

Chart Production Capacities of Major Synthetic Rubber Types in China, 2012

Chart Annual Output Volume of Synthetic Rubber in China, 2001-2012

Chart Monthly Output Volume of Synthetic Rubber in China, 2008-2013

Chart Sales Volume of Synthetic Rubber in China, 2000-2012

Chart Output Volume and Growth Rate of Automobiles in China, 2008-2012

Chart Auto Reserve Volume in China, 2008-2012

Chart Output Volume of Auto Tires in China, 2008-2012

Chart Main Business Income of Industries Producing Rubber Plates, Rubber Pipes and Rubber Belts in China, 2001-2012

Chart Main Business Income of Rubber Component Manufacturing Industry in China, 2001-2012

Chart Export Volume and Export Value of Synthetic Rubber in China, 2001-2012

Chart Import Volume and Import Value of Synthetic Rubber in China, 2001-2012

Chart Production Capacity Distribution of China Major Styrene Butadiene Rubber Manufacturing Enterprises, 2008- 2012

Chart Supply & Demand Balance of Styrene Butadiene Rubber in China, 2008-2012

Chart Price of Styrene Butadiene Rubber in China, 2001-2012

Chart Production Capacity Distribution of Butadiene Rubber in China, 2007-2012

Chart Supply and Demand of Butadiene Rubber in China, 2007-2012

Chart Price of Butadiene Rubber in China, 2008-2012

Chart Production Capacity of Isobutylene-isoprene Rubber in China, 2012

Chart Price of Isobutylene-isoprene Rubber in China, 2008-2012

Chart Forecast on Output Volume of Synthetic Rubber in China, 2013-2017

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