

Research Report on China's Synthetic Rubber Industry, 2018-2022

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Abstracts

Description

There are various types of synthetic rubber. Rubber with special properties can be synthesized for different purposes. Therefore, the output of synthetic rubber has far exceeded natural rubber in the world. Currently, synthetic rubber is mainly produced in the U.S., China, Japan, Russia and Germany. In 2017, the global consumption of synthetic rubber exceeded 15 million tons, about 55% of which was from the Asia-Pacific region.

According to CRI, China has become the world's largest producer, consumer and importer of synthetic rubber in recent years. With the acceleration of China's tire industry and infrastructure, industrialized production has been achieved for eight types of synthetic rubber, i.e. styrene butadiene rubber, polybutadiene rubber, chloroprene rubber, nitrile-butadiene rubber, butyl rubber, polyisoprene rubber, ethylene propylene rubber and thermoplastic styrene butadiene rubber. In 2017, the output of synthetic rubber in China reached 5,787,000 tons, increasing by about 3.3% YOY. Synthetic rubbers, including butadiene rubber (BR), styrene butadiene rubber (SBR), nitrile-butadiene rubber (NBR) and SBS thermoplastic elastomers, vary with each other in properties, advantages and disadvantages. For example, China needs to import high-end butadiene rubber such as rare earth butadiene rubber while it has an overcapacity of styrene butadiene rubber. China still needs to import millions of tons of synthetic rubber every year to meet its domestic demand.

According to CRI, there is a structural overcapacity in China's synthetic rubber industry, low technical barrier of general synthetic rubber, repeated development of low-end sectors, and homogeneous middle and low-end products. Since the R&D of special

synthetic rubber requires huge investment and has high technical barriers, special synthetic rubber in China is mainly imported. As the Chinese government tightens the oversight for environment production, excessive capacity will be gradually eliminated, the industry will be reorganized, and the competition will be fiercer. The main raw material of synthetic rubber is butadiene. Butadiene prices fluctuate with the prices of crude oil and butadiene supply is concentrated in China. Butadiene determines the costs of synthetic rubber to a great extent. As natural rubber and synthetic rubber are substitutes for each other, the demand for synthetic rubber will be affected by natural rubber in the short term. And the price changes of natural rubber and synthetic rubber will be synchronous in some degree. Compared with synthetic rubber, natural rubber has advantages in terms of tensile strength, tear resistance and abrasion resistance. Synthetic rubber has not natural rubber's all advantages at the application end due to limited chemical technologies. However, they satisfy some downstream demand by product diversity.

According to CRI, the main downstream industry of synthetic rubber and natural rubber is the automotive industry which contributes over 70% of the rubber consumption in China. The main demand field is automobile tires. From 2018 to 2022, China's tire production will continue to rise and drives the development of the synthetic rubber industry with the OEM tire demand from expanding automobile production, the tire replacement demand from increasing automobile reserves, and the increase in tire exports.

Topics Covered:

Development environment of synthetic rubber

Supply of and demand for synthetic rubber

Competition in China's synthetic rubber industry

Major synthetic rubber manufacturers in China

Production costs and prices of synthetic rubber

Driving forces and market opportunities for China's synthetic rubber industry from 2018 to 2022

Prospect of China's synthetic rubber industry from 2018 to 2022

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