

Research Report on Chinese Natural Rubber Industry, 2011-2012

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Abstracts

In 2010, Chinese natural rubber consumption broke through 3.50 million tons, accounting for over 1/3 of global natural rubber consumption. However, Chinese natural rubber output was only 687,000 tons, and the degree of external dependence exceeded 80%.

Due to rapid development of Chinese automobile industry and rapid growth of tire export in recent years, tire productivity rapidly expands, and natural rubber consumption greatly increases. In 2010, Chinese automobile output and sales volume saw a substantial increase, i.e. in 2010, Chinese automobile output was about 18.26 million, rising by 32.44% YOY; automobile sales volume was about 18.06 million, ascending by 32.37% YOY. Meanwhile, Chinese tire output also enjoyed a great increase. In 2010, Chinese rubber tire cover output reached 776.34 million, growing by 19.82% YOY.

Chinese natural rubber output cannot realize a substantial increase due to geographic position and climatic conditions. Hence, with constantly increasing demand in the downstream, Chinese natural rubber has high degree of external dependence. In 2010, China imported 1.86 million tons of natural rubber, increasing by 8.80% over 2009; the value was USD 5.67 billion, rising by 100%; the average import price was USD 3,045 per ton, greatly rising by 85.10%.

However, Chinese total natural rubber output fails to realize a great increase. In 2010, rubber tapping area of Chinese natural rubber increased, but the time of rubber tapping was postponed since the rubber planting areas in Yunnan suffered low temperature and droughts in 2010 H1; in addition, the rubber tapping time was shortened since the rubber planting areas in Hainan were influenced by continual heavy rain in 2010 Q3. As a result, domestic natural rubber output experienced a limited growth.

Since China has huge natural rubber consumption while it is hard for domestic natural rubber output to realize a substantial increase, Chinese enterprises are currently adopting measures including investing and establishing natural rubber plantations in the regions overseas suitable for rubber planting, accelerating the development of isoprene rubber with strong substitution of natural rubber and promoting the development of scrapped tire utilization industry so as to reduce the degree of external dependence of domestic natural rubber.

It deserves attention that in the next 1-2 years, natural rubber prices are predicted to maintain the rising tendency. First, idle fund speculation leads to the rise of futures prices, which drives the increase of spot prices. In recent period, since capital speculation comes into being and a proportion of national currency devaluates, thus rapidly flowing into the futures market in order to evade the inflation risk, spot prices of natural rubber also increase. Second, on Dec. 24, 2010, India decided to reduce natural rubber import tariffs to 7.50% before March 31, 2011. Since India is the world's second largest natural rubber consuming country, its reduction of natural rubber import tariffs sends a signal of tense demand to international natural rubber market.

Through this report, more following information can be acquired:

- Natural rubber supply and demand
- Downstream demand for natural rubber
- Policies for natural rubber released by the Chinese government
- Chinese natural rubber import and export
- Prediction on development tendency of natural rubber industry

Following people are recommended to buy this report:

- Natural rubber planting enterprises
- Natural rubber trade enterprises

Downstream enterprises of the natural rubber industry

Investors focusing on the natural rubber industry

Research institutes focusing on the natural rubber industry

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