Research on China Synthetic Rubber Industry, 2012-2017

(Sample)

Huidian Research

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3. Status Quo of China’s Synthetic Rubber Industry

3.3 Supply & Demand Analysis and Forecast

3.3.1 Industrial Supply & Demand Analysis

China’s synthetic rubber industry’s output and apparent consumption volume increased rapidly. The output increased to 3.488 million tons (including latex) in 2011 from 1.047 million tons in 2001, increased by more than twice, and the compound growth rate during this period reached 12.8%; apparent consumption volume increased to 4.656 million tons of 2011 from 1.684 million tons of 2001 (including latex), and the compound growth rate was 10.7%. China’s synthetic rubber’s output and apparent consumption also keeps long-term rapid growth, the growth speed of output was relatively fast, and the import volume showed the downward trend. Before 2008, China’s synthetic rubber self-sufficiency rate maintained at about 60%. While since 2008, the self-sufficiency rate increased to some extent due to the release of large amount of new production capacity, and this rate reached 74.9% in 2011. There is still a large proportion in China’s synthetic rubber consumption relies on imports, so China’s synthetic rubber industry still has growth space in the future.

Fig. 13 Output and Apparent Consumption of China’s Synthetic Rubber Industry (including latex), 2001-2011

Source: Huidian Research

3.3.2 Industrial Supply & Demand Forecast

China’s synthetic rubber production capacity grows rapidly. From 2009 to 2011, the production capacity kept the rapid growth trend, and the finished production capacity was
480,000 tons/year, 345,000 tons/year and 520,000 tons/year respectively. The newly build production capacity still concentrated in three kinds of synthetic rubbers, namely, styrene butadiene rubber, butadiene rubber and SBS thermoplastic elastomer, and the production capacity of butyl rubber still has certain expansion. According to the forecast of China Association of Synthetic Rubber Industry, China’s synthetic rubber production capacity will reach 3.33 million tons/year in 2011, and it is estimated that by the end of 2015, China’s synthetic rubber production capacity will reach 6 million tons/year, and the compound growth rate can reach 15.9%.

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