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## THE YEAR 2011-12

### NATURAL RUBBER (NR)

#### Production Sector

Natural Rubber (NR) production in the country during 2011-12 was 903,700 tonnes compared to 861,950 tonnes during 2010-11 and recorded a growth of 4.8% compared to 3.7% attained during the previous year. The growth in production was attributed by favourable climate and attractive price. India continued to be in the first position in the world in productivity during 2011-12 also, which increased to 1841 kg/ha from 1806 kg/ha during 2010-11. Production of NR for the year 2012-13 is projected at 9.42 lakh tonnes with a growth of 4.2%.

#### Consumption Sector

The total consumption of NR in 2011-12 was 964,415 tonnes with a growth of 1.8% as against 947,715 tonnes during 2010-11. The auto tyre sector recorded a growth of 5.7% during 2011-12 as against 3.7% achieved during 2010-11. At the same time, the general rubber goods sector registered a negative growth of 4.9% during 2011-12 compared to a negative growth of 1.2% during the previous year. According to the Automotive Tyre Manufacturers Association (ATMA), the average growth in tyre production during the year 2011-12 was 5% compared to 22% in 2010-11. The truck & bus tyre production registered a growth of only 3% during 2011-12, which was the same growth achieved during 2010-11. The production of tyres of passenger car segments recorded only 4% growth in 2011-12 as against a high growth of 31% recorded during 2010-11. But, export of tyres during 2011-12 increased by 23% while the growth attained during 2010-11 was 22%. The export of truck & bus and passenger car tyres registered 12% and 40% growth respectively during 2011-12. The projected consumption of NR for the year 2012-13 is 10.06 lakh tonnes at a growth of 4.4 %.

#### Import & Export

As per the import figures collected from various ports upto 31<sup>st</sup> March 2012 the country imported 205,433 tonnes during 2011-12. The total import of NR was 190,674 tonnes during 2010-11 as per the revised statistics published by the Directorate General of Commercial Intelligence & Statistics (DGCI&S). Exporters have utilized the advantage of price differential between domestic and international

price of sheet rubber and concentrated latex during the first half and terminal months of 2011-12 and exported 27,145 tonnes of NR during the year. The country exported 29,851 tonnes of NR during 2010-11. Stock of NR at the end of March 2012 was 236,275 tonnes.

### SYNTHETIC RUBBER (SR)

#### Production & Consumption

The Synthetic Rubber production nominally increased to 110,599 tonnes during 2011-12 from 110,340 tonnes during 2010-11, registering a growth of 0.2% as against a growth of 3.4% during 2010-11. The share of poly-butadiene rubber was 71% during 2011-12.

SR consumption increased to 423,350 tonnes during 2011-12 registering a growth of 2.8% as against 411,830 tonnes consumed during 2010-11. The automotive tyre sector consumed 307,365 tonnes of SR during 2011-12 as against 298,414 tonnes during 2010-11, recording a growth of 3.0%. The relative share of consumption of NR and SR in India was 69:31 during 2011-12.

Consumption details of NR and SR are summarized in Table 1.

Table 1 CONSUMPTION OF NR AND SR			
	2011-12p	2010-11	Growth
	(Tonnes)		(%)
<b>Natural Rubber</b>			
Auto Tyres & Tubes	631410	597623	5.7
General Rubber Goods	333005	350092	-4.9
<b>Total NR</b>	<b>964415</b>	<b>947715</b>	<b>1.8</b>
<b>Synthetic Rubber</b>			
Auto Tyres & Tubes	307365	298414	3.0
General Rubber Goods	115985	113416	2.3
<b>Total SR</b>	<b>423350</b>	<b>411830</b>	<b>2.8</b>
<b>NR &amp; SR</b>			
Auto Tyres & Tubes	938775	896037	4.8
General Rubber Goods	448990	463508	-3.1
<b>Total NR &amp; SR</b>	<b>1387765</b>	<b>1359545</b>	<b>2.1</b>

p: provisional

Import of SR by the rubber goods manufacturing industry during 2011-12 increased to 327,625 tonnes compared to 302,030 tonnes during 2010-11.

(Metric Tonnes)					
Type-wise Production & Consumption of NR & SR	March 2012	March 2011	April 2011 to March 2012 p	April 2010 to March 2011	Percentage increase (+)/ decrease(-) of (3) & (4) (5)
	(1)	(2)	(3)	(4)	(5)
<b>PRODUCTION</b>					
<b>Natural Rubber (NR)</b>					
Ribbed Smoked Sheet (RSS)	37595	35665	658200	618960	
Solid Block Rubber	9120	9600	119815	117830	
Latex Concentrates (drc)	6265	6575	76490	76065	
Others	2320	2560	49195	49095	
<b>Total</b>	<b>55300</b>	<b>54400</b>	<b>903700</b>	<b>861950</b>	<b>4.8</b>
<b>Synthetic Rubber (SR)<sup>p</sup></b>					
Styrene Butadiene (SBR)	1074	1663	18791	19994	
Poly Butadiene(BR)	6290	6100	78745	75905	
Others	771	1580	13063	14441	
<b>Total</b>	<b>8135</b>	<b>9343</b>	<b>110599</b>	<b>110340</b>	<b>0.2</b>
<b>Total NR &amp; SR</b>	<b>63435</b>	<b>63743</b>	<b>1014299</b>	<b>972290</b>	<b>4.3</b>
<b>CONSUMPTION *</b>					
<b>Natural Rubber (NR)</b>					
Ribbed Smoked Sheet (RSS)	53110	57890	616215	607455	
Solid Block Rubber	21380	13585	248285	235130	
Latex Concentrates (drc)	5925	6290	73190	77380	
Others	1985	2245	26725	27750	
<b>Total</b>	<b>82400</b>	<b>80010</b>	<b>964415</b>	<b>947715</b>	<b>1.8</b>
Out of which Auto Tyre Manufacturers	53631	51666	631410 <sup>R</sup>	597623	5.7
<b>Synthetic Rubber (SR)<sup>p</sup></b>					
Styrene Butadiene (SBR)	16505	14920	185265	174855	
Poly Butadiene(BR)	12160	11570	134630	125305	
Others	7615	9535	103455	111670	
<b>Total</b>	<b>36280</b>	<b>36025</b>	<b>423350</b>	<b>411830</b>	<b>2.8</b>
Out of which Auto Tyre Manufacturers	26229	26295	307365 <sup>R</sup>	298414	3.0
<b>Total NR &amp; SR</b>	<b>118680</b>	<b>116035</b>	<b>1387765</b>	<b>1359545</b>	<b>2.1</b>
Out of which Auto Tyre Manufacturers	79860	77961	938775	896037	4.8

\*: indigenous and imported

Note: Revised grade-wise production of NR

(Metric Tonnes)				
Production Consumption and stock of RR	March 2012 (1)	March 2011 (2)	April 2011 to March 2012 p (3)	April 2010 to March 2011 (4)
<b>Reclaimed Rubber (RR)</b>				
Production @	9295	8470	103565	99960
Consumption	8920	8620	102435	100290
Out of which Auto Tyre Manufacturers	3828	3570	43178 <sup>R</sup>	40511
Stock with Manufacturers (end of month/year)	6080	4950		

@: indigenous purchase by manufacturers

IMPORT/EXPORT & STOCK OF NR & SR				
<b>Import (p)</b>				
Natural Rubber	19582	5253	205433	190674 <sup>R</sup>
Synthetic Rubber	30300	26275	327625	302030
<b>Total NR &amp; SR</b>	<b>49882</b>	<b>31528</b>	<b>533058</b>	<b>492704</b>
<b>Export (p)</b>				
Natural Rubber	2464	7943	27145	29851

STOCK AT THE END OF MARCH 2012 <sup>R</sup>			
(Metric tonnes)			
<b>Natural Rubber</b>			
With Growers	62010	Ribbed Smoked Sheet	167460
With Dealers & Processors	101940	Solid Block Rubber	25405
With Auto Tyre units©	50315	Latex(drc)	18875
With other manufacturing units	22010	Others	24535
<b>Total</b>	<b>236275</b>	<b>Total</b>	<b>236275</b>

©: including transit

<b>Synthetic Rubber</b>			
With Producers	5875		
With Auto Tyre units	38025	SBR	23925
With other manufacturing units	6425	Others	26400
<b>Total</b>	<b>50325</b>	<b>Total</b>	<b>50325</b>

p:provisional

R:Revised

Table II

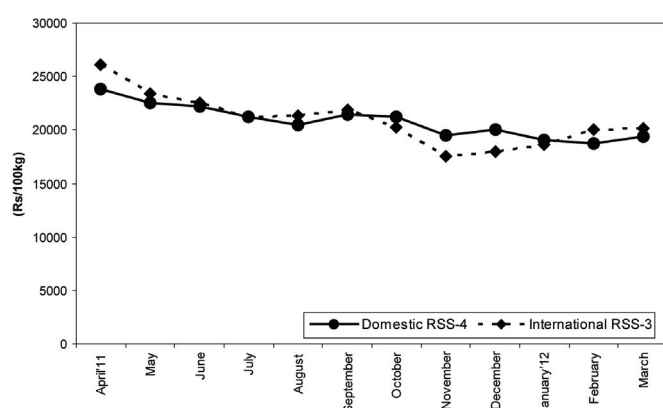
Price of Natural Rubber - 2011-12 (Rs./100Kg)							
	RSS 5	RSS 4	RSS 3	Latex (60% drc)		ISNR 20	SMR 20
	Domestic		International	Domestic	International	Domestic	International
<b>2010-11</b>	<b>18419</b>	<b>19003</b>	<b>19555</b>	<b>20500</b>	<b>20156</b>	<b>17976</b>	<b>17600</b>
April '11	23568	23868	26071	23974	25976	23322	22235
May	22306	22523	23367	22622	23760	21520	20165
June	21950	22185	22577	23163	23089	21623	20314
July	20994	21242	21266	22877	21895	21002	20157
August	19917	20462	21356	21861	21912	20086	20705
September	20744	21459	21843	22253	22254	20879	21310
October	20931	21185	20252	21592	21348	20153	20051
November	19206	19502	17525	19236	18718	17740	16988
December	19683	20030	17938	18345	18733	18805	17430
January '12	18556	19094	18639	18153	18700	18640	17663
February	18435	18764	20046	20920	21314	18666	18284
March	19141	19344	20101	21367	21805	19125	18721
<b>2011-12</b>	<b>20453</b>	<b>20805</b>	<b>20915</b>	<b>21364</b>	<b>21625</b>	<b>20130</b>	<b>19502</b>

Note: Domestic price refers to Kottayam market, International RSS 3 refers to Bangkok price International price of latex and SMR 20 to Kuala Lumpur market.

## Price of Natural Rubber

Annual average price for domestic RSS 4 grade rubber for the year 2011-12 was Rs 20,805/- per 100 kg compared to Rs.19,003/- per 100 kg in 2010-11. During 2011-12, the average price of international RSS 3 grade was Rs.20,915/- per 100 kg and it was Rs.19,555/- per 100 kg during 2010-11. Domestic RSS-4 price peaked at Rs.24,300/- per 100 kg on 5-4-2011 and international price of RSS-3 peaked at Rs.27,212/- per 100 kg on 12-4-2011. Domestic RSS-4 price was ruling above the international RSS-3 price only for October 2011 to January 2012.

PRICE OF NATURAL RUBBER -2011-12



## World Rubber Situation – 2011

### Production

According to the International Rubber Study Group (IRSG), the world NR production increased by 5.5% to 10.97 million tonnes in 2011, compared to a growth of 7.3% during 2010. The output in main producing countries viz; Thailand, Indonesia, Malaysia, India, Vietnam and China increased during 2011. Global SR production during 2011 was 15.1 million tonnes as against 14.1 million tonnes produced in 2010 registering an increase of 7.3%.

Table III

Country-wise production of NR ('000 tonnes)			
Country	2010	2011	% Growth
Thailand	3252	3394	4.4
Indonesia	2736	2982	9.0
Malaysia	939	996	6.1
India	851	890	4.6
Vietnam	752	812	8.0
China	665	707	6.3
Others	1204	1193	-0.9
<b>World Total</b>	<b>10399</b>	<b>10974</b>	<b>5.5</b>

## Consumption

Global NR consumption increased to 10.92 million tonnes in 2011 registering a growth of only 1.4% compared to 10.78 million tonnes in 2010, which has recorded a growth of 15.5%. Consumption of NR in main consuming countries decelerated during 2011. Consumption of NR in USA, India and Japan increased by 11.1%, 1.5% and 2.0% respectively during 2011 compared to 34.8%, 4.3% and 17.9% attained respectively during 2010. NR consumption in China showed a negative growth of 1.2% during 2011 compared to a positive growth of 7.7% achieved during 2010.

Global SR consumption increased to 14.93 million tonnes during 2011 from 14.09 million tonnes during 2010, recording a growth of 6.0%. World NR and SR consumption ratio during 2011 was 42:58 and it was 43:57 during 2010.

Table IV

Country-wise consumption of NR ('000 tonnes)			
Country	2010	2011	% Growth
China	3646	3603	-1.2
India	944	958	1.5
U.S.A.	926	1029	11.1
Japan	750	765	2.0
Malaysia	458	402	-12.2
Indonesia	421	442	5.0
Thailand	459	480	4.6
Rep.of Korea	384	402	4.7
Others	2790	2843	1.9
<b>World Total</b>	<b>10778</b>	<b>10924</b>	<b>1.4</b>

According to IRSG, the world supply-demand balance of NR showed a surplus of 50 thousand tonnes during 2011.

Source: Rubber Industry Report (January-March 2012) of International Rubber Study Group.