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भारतीय रबड़ सांख्यिकी

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सांख्यिकी एवं योजना विभाग
द्वारा संकलित

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ABOUT THE RUBBER BOARD

The Rubber Board was constituted by the Government of India as a body corporate under the Rubber Act 1947 with the primary objective of overall development of rubber industry in the country.

The functions of the Board as defined under the Act are: (1) It shall be the duty of the Board to promote by such measures as it thinks fit the development of the rubber industry; (2) Without prejudice to the generality of the foregoing provision, the measures referred to therein may provide for:- (a) undertaking, assisting or encouraging scientific, technological and economic research; (b) training students in improved methods of planting, cultivation, manuring and spraying; (c) the supply of technical advice to rubber growers; (d) improving the marketing of rubber; (e) the collection of statistics from owners of estates, dealers and manufacturers; (f) securing better working conditions and the provisions and improvement of amenities and incentives for workers; (g) carrying out any other duties which may be vested in the Board under the rules made under this Act.

It shall also be the duty of the Board – (a) to advise the Central Government on all matters relating to the development of the rubber industry, including the import and export of rubber; (b) to advise the Central Government with regard to participation in any international conference or scheme relating to rubber; (c) to submit to the Central Government and such other authorities as may be prescribed half yearly reports on its activities and the working of this Act; (d) to prepare and furnish such other reports relating to the rubber industry as may be required by the Central Government from time to time.

CHAIRMAN PAGE COLOUR

IN RETROSPECT

Production of NR

India continued to occupy the fourth largest producer of natural rubber (NR) by accounting for 8.1% of the global supply during the year ended December 2012. The country produced 913,700 tonne of NR during the year ended March 2013, marginally up 1.1% from the quantity of 903,700 tonne produced in the previous year at 4.8% rate of growth. The increase in production during 2012-13, despite a fall in the average yield, was contributed by expansion of yielding area to 504,000 ha during the year from 490,970 ha in the prev ious year. The average yield, measured in terms of production per hectare of yielding area, declined to 1,813 kg during the year from 1,841 kg in the previous year due to adverse climate coupled with farmers' short-run response to fall in rubber prices.

Small holdings sector continued to dominate the production by accounting for 90.5 % of the area and 93.5% of the supply during 2012-13. As regards geographical composition, the State of Kerala accounted for 87.6% of the country's production during year under review. The relative share of north-eastern states in the total production has marginally risen to 6.1% in 2012-13 from 5.5% a year ago.

The production is anticipated to fall 4.8% to 870,000 tonne during 2013-14 largely on account of the adverse weather conditions that prevailed in the State of Kerala during April to July 2013 coupled with decline in rubber prices.

Consumption of NR

In terms of consumption of NR during the year ended December 2012, India stood the second among all NR consuming countries by accounting for 9.0% of the global demand during the year. However, sluggish economic conditions have slowed down the demand for NR in India. The consumption grew at slow rate of 0.9% to 972,705 tonne during the year ended March 2013 as against the previous year's 1.8% rise to 964,415 tonne. During the year under review (April 2012 to March 2013), the consumption grew at a rate of 1.2% in the general rubber goods sector as compared to a 0.7% growth registered in the auto-tyre sector. Auto-tyre sector accounted for 65.3% of the total quantity of NR consumed in the country during the year under review. The table below shows the separate figures of consumption of NR and SR (synthetic rubber) both in the auto-tyre sector and the general rubber goods sector.

Consumption of NR and SR across Sectors

	2011-12 (Tonne)	2012-13 (Tonne)	Year-on-year change (%)
Natural Rubber -Total	**964,415**	**972,705**	**0.9**
Auto-tyre sector	631,410	635,539	0.7
General rubber goods sector	333,005	337,166	1.2
Synthetic Rubber - Total	**423,350**	**444,160**	**4.9**
Auto-tyre sector	307,365	323,412	5.2
General rubber goods sector	115,985	120,748	4.1

Looking ahead, the consumption in the country is anticipated to fall by 2.8% to 945,000 tonne during 2013-14.

Trade in NR

The import policy for NR and the tariff rates remained unchanged during the year under review. The country imported 217,364 tonne of NR during 2012-13 as per the NOC for customs clearance issued by the Rubber Board which is the designated agency for enforcing quality of NR. This is marginally up from the quantity of 214,433 tonne the country imported in the previous year. As is evident from the following table, 47.3% of the total imports had landed through open-channel on payment of prevailing customs duty. This is largely attributed to favourable relative prices as the domestic market stayed above the international market from the end of June 2012 through the end of November 2012. Moreover, the high interest rates prevailed in India added attraction to NR available from overseas markets on credit.

Quantity of NR Imported through different Channels (Tonne)

Channels of Import	2011-12	2012-13
Duty Exemption Entitlement Certificate (DEEC)	126,094	101,725
Open Channel	66,148	102,874
Duty Entitlement Passbook (DEPB)	16,432	7,677
Duty-free Import Authorization Scheme (DFIAS)	2,115	3,430
Others	3,644	1,658
Total	**214,433**	**217,364**

Among the various source countries, Indonesia alone accounted for 45.6% of the total volume imported in India during the year, followed by Vietnam (23.6%) and Thailand (18.3%). Of the various forms of NR imported during the year, 75.2% was Technically Specified Rubber.

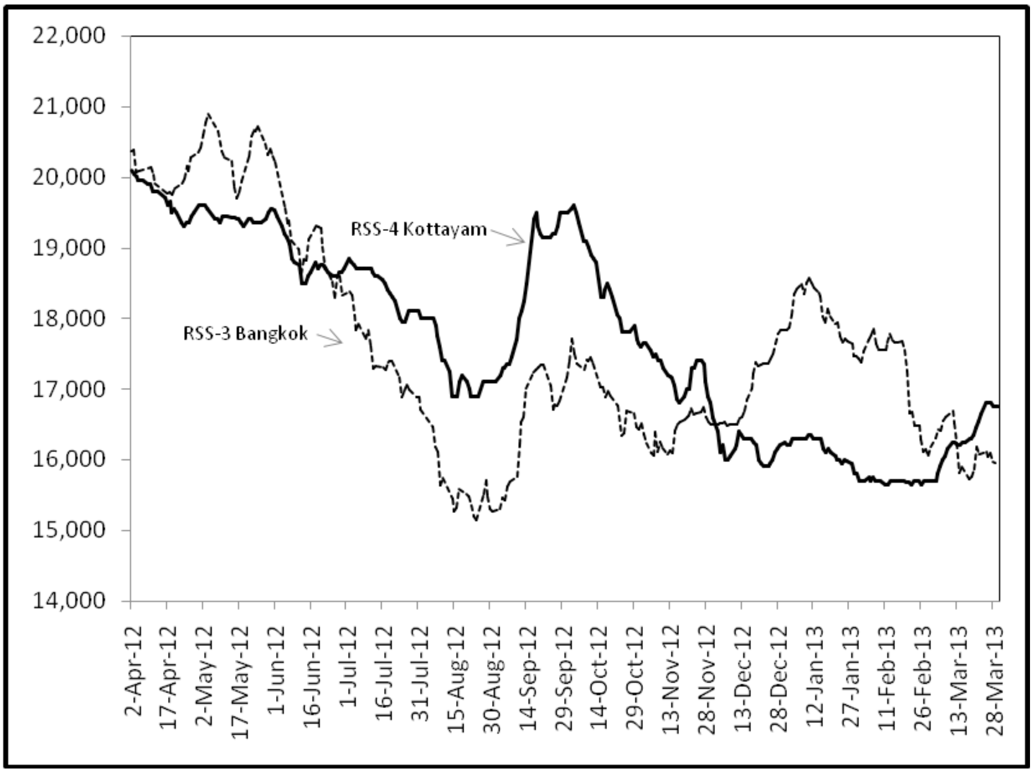
As regards India's export of NR, the volume increased during 2012-13 to 30,594 tonne from 27,145 tonne shipped a year ago. Higher international prices in May 2012 and during the period from the beginning of December 2012 to mid- March 2013 made exports attractive. Moreover, incentives to the quality-endorsed branded Indian Natural Rubber provided under a Market-Linked Focus Product Scheme made exports more attractive. Of the total volume exported during 2012-13, 58.8% was shipped under the scheme.

Trends in NR Prices

NR prices in India have generally moved along a falling trajectory during the year under review with a few exceptions. The prices of the benchmark grade RSS-4, at Kottayam, fluctuated between Rs.201.00/kg (recorded on April 2, 2012) and Rs.156.50/kg (Feb.11, 2013) and averaged at Rs.176.82/kg during the year. The Indian market (Kottayam) more or less tracked the trends in the international market (Bangkok). At the Bangkok market, the benchmark sheet grade, RSS-3, averaged at Rs.175.76/kg during the year ended March 2013. However, it is noteworthy that the domestic market (RSS-4 at Kottayam) has been less volatile than the international market (RSS-3 at Bangkok), which widely fluctuated between Rs.209.00/kg (recorded on May 4, 2012) and Rs.151.37/kg (August 24, 2012).

The following graph shows the trends in daily prices of RSS-4 at Kottayam and RSS-3 at Bangkok with reference to the period from April 2012 to March 2013.

Trends in Daily Prices of RSS at Kottayam and Bangkok (Rs/100 kg)
(Period: April 1, 2012 to March 31, 2013)



The graph shows periods of considerable gap between the domestic and international markets although directionally both have exhibited almost similar trends throughout the year. A host of factors such as global economic slowdown, bearish demand outlook and retreat in crude oil prices have depressed international prices and the domestic prices have followed suit with very few exceptions.

Developments in SR Sector

Production of synthetic rubber (SR) in India fell by 1.7% to 108,692 tonne during 2012-13 from the quantity of 110,599 tonne produced in the year before. Polybutadiene (BR) constituted 70.9% of the total quantity produced during the year under review.

Consumption of SR, however, rose 4.9% to 444,160 tonne during 2012-13, driven by both auto-tyre and general rubber goods sectors. The consumption grew during the year by 5.2% in auto-tyre sector and 4.1% in non-tyre sector. Auto-tyre sector continued to dominate the country's consumption of SR by accounting for 72.8% of the total quantity consumed during the year under reference. Among the various grades of SR consumed in India, styrene butadiene (SBR) accounted for 44.2% followed by BR (32.8%). In the total volume of NR and SR consumed in India, the relative share of NR declined by a 0.8 percentage point to 68.7% during 2012-13. The continued decline in NR's relative share is largely ascribed to an increasing dominance of passenger car tyres in the country's total production of auto-tyres.

Developments in the Global Scenario

Global supply of NR rose 2.5% to 11.327 million tonne during the 12 months ended December 2012. The supply has slowed down during the year from the 6.4% rate attained during the same period a year ago. According to the projections available from International Rubber Study Group (IRSG) in September 2013, the supply is expected to touch 11.7 million tonne during the year ending December 2013, up 3.3% on year. Trends in supply from major producing countries are shown in the following table.

Production of NR in Major Producing Countries ('000 tonne)

Country	2011[1]	2012[1]	% Change
Thailand	3,394	3,512	3.5
Indonesia	2,982	3,015	1.1
Malaysia	996	923	-7.3
India	893	919	2.9
Vietnam	812	864	6.4
China	727	795	9.4
World [2]	**11,055**	**11,327**	**2.5**

[1]The period referred is the 12 months ended December of the year.

[2]Includes all other countries which are not listed above.

Source: *Rubber Statistical Bulletin*, International Rubber Study Group, Singapore.

Global demand for NR slowed down during the year ended December 2012 on economic woes and resultant sluggishness in auto-tyre and other end-use sectors. The global consumption during the year ended December 2012 was 11.005 million tonne, representing only a 0.4% rise from the quantity of 10.963 million tonne consumed during the same period a year ago. The table below summarises the trends in consumption of NR in major consuming countries.

Consumption of NR in Major Consuming Countries ('000 tonne)

Country	2011[1]	2012[1]	% Change
China	3,622	3,853	6.4
India	957	988	3.2
USA	1,029	950	-7.7
Japan	772	733	-5.1
Thailand	480	490	2.1
Indonesia	441	488	10.7
Malaysia	402	441	9.7
Rep. of Korea	402	396	-1.5
World [2]	**10,963**	**11,005**	**0.4**

[1] The period referred is the 12 months ended December of the year.

[2] Includes other countries which are not listed above.

Source: *Rubber Statistical Bulletin*, International Rubber Study Group, Singapore.

Projections available from the IRSG indicate that the global consumption of NR would be 11.592 million tonne during the year ending December 2013, representing a 3.6% rise on year.

Coming to SR, the global supply marginally increased by 0.5% to 15.185 million tonne and the demand rose 1.0% to 14.969 million tonne during the 12 months ended December 2012. NR accounted for 42.4% of the total global consumption of NR and SR during the year ended December 2012.

R. B. Nair

Remesh B Nair

Kottayam — *Joint Director*

25 November, 2013 — ***Statistics & Planning Department***

स्वाभाविक रबड निष्पादन - 2012-13

क्षेत्र विस्तार	**758,000** हेक्टेयर (**3.2 %** वृद्धि)
उत्पादन	**913,700** टण (**1.1 %** वृद्धि)
उपभोग	**972,705** टण (**0.9 %** वृद्धि)
आयात	**217,364** टण
निर्यात	**30,594** टण
आरएसएस **4** ग्रेड का औसतन बाजार भाव	**₹ 176.82**/कि ग्रा
वर्षांत में स्टोक	**253,000** टण
छोटी जोतों की संख्या	**1.25** मिलियन
बागानों की संख्या	**537**
औसतन उपज प्रति हेक्टेयर	**1,813** कि ग्रा
स्वाभाविक रबड पर सीमा शुल्क	
ठोस रूप में	**20%** या प्रति कि ग्रा रु **20** जो भी कम हो
लैटेक्स	**70%** या प्रति कि ग्रा रु **49** जो भी कम हो
आयातित स्वाभाविक रबड का मूल्य	रु **3,887.9** करोड
निर्यातित स्वाभाविक रबड का मूल्य	रु **468.5** करोड
आयातित रबड उत्पादों का मूल्य	रु **6,206.3** करोड (**2011-12**)
निर्यातित रबड उत्पादों का मूल्य	रु **15,532.2** करोड
कृषकों को स्वाभाविक रबड से आय	रु **16,150** करोड
स्वाभाविक रबड पर उपकर	रु **128.28** करोड
अनुज्ञापत्रित व्यापारियों की संख्या	**9,533**
अनुज्ञापत्रित विनिर्माताओं की संख्या	**4,334**
टायर और टायर इतर उपभोग का अनुपात	**65:35**
स्वाभाविक और कृत्रिम रबड़ उपभोग अनुपात	**69:31**
इलास्टमर का प्रतिव्यक्ति उपभोग	**1.16** कि ग्रा
टायर उद्योग की कुल बिक्री	रु **46,000** करोड
टायर उत्पादन	**122.78** मिलियन नं.
टायर निर्यात का मूल्य	रु **4,775** करोड
विश्व उत्पादन	**11.327** मिलियन टण (**2012**)
विश्व उपभोग	**11.005** मिलियन टण (**2012**)
विश्व स्वाभाविक एवं कृत्रिम रबड उपभोग अनुपात	**42:58**
आरएसएस **3** श्रेणी का अंतर्राष्ट्रीय भाव	रु **175.76** /कि ग्रा

PERFORMANCE OF NATURAL RUBBER - 2012-13

Area	758,000 Hectares (3.2% Growth)
Production	913,700 Tonnes (1.1% Growth)
Consumption	972,705 Tonnes (0.9% Growth)
Import	217,364 Tonnes
Export	30,594 Tonnes
Average Market Price for RSS 4 grade	Rs 176.82/kg
Stock at the end of the year	253,000 Tonnes
Number of small holdings	1.25 Million
Number of estates	537
Average yield per hectare	1,813kg
Customs duty on natural rubber	
Solid form	20% or Rs 20 / kg whichever is lower
Latex	70% or Rs 49 / kg whichever is lower
Value of Natural rubber imported	Rs 3,887.9 Crore
Value of Natural rubber exported	Rs 468.5 Crore
Value of rubber products imported	Rs 6,206.3 Crore (2011-12)
Value of rubber products exported	Rs 15,532.2 Crore
Income from NR to the growers	Rs 16,150 Crore
Cess on Natural Rubber	Rs 128.28 Crore
Number of licensed dealers	9,533
Number of licensed manufacturers	4,334
Tyre and Non-tyre NR consumption ratio	65:35
NR and SR consumption ratio	69:31
Per capita consumption of elastomer	1.16 kg
Tyre industry turnover	Rs 46,000 Crore
Tyre production	122.78 Million Numbers
Value of tyre exports	Rs 4,775 Crore
World production	11.327 Million Tonne (2012)
World consumption	11.005 Million Tonne (2012)
World NR & SR consumption ratio	42: 58
International price of RSS 3 grade	Rs 175.76/kg

CONNOTATIONS

Holding	Unless the contrary is stated, the word means a rubber area contiguous or non-contiguous aggregating 10 ha or less under a single ownership.
Estate	Land contiguous or non-contiguous aggregating more than 10 ha planted with rubber under a single ownership is treated as "Estate". However, estates/holdings situated in different taluks even if they are under a single ownership are considered separately. In this context, the word owner includes any agent of an owner and a mortgage in possession and a lessee of the area. (According to "The Rubber (Amendment) Act 2009" dated 22nd January 2010, the rubber growers possessing an area of 10 hectare and above are classified as large rubber growers. The ceiling until then was 50 acre or 20 hectare).
Newplanted area	Land planted with rubber for the first time.
Replanted area	Land planted with rubber by removing the rubber trees planted earlier.
Tapped area	Area, which is being tapped.
Yield per hectare	Average yield per ha of tapped area.
Manufacturer	A manufacturer of rubber goods who has taken out a licence from the Board for acquiring natural rubber.
Dealer	One who has taken out a licence from the Board for dealing in natural rubber, holding natural rubber stock. Under the Rubber Act all dealers and all consumers (manufacturers of rubber goods) of natural rubber should take out licence from the Rubber Board.
Natural Rubber	Includes the Dry Rubber Content (drc) of all grades and qualities of natural rubber. Quantity under latex also refers to weight of drc.
Synthetic Rubber	Includes oil content of oil extended rubber and total solid contents of lattices.
Reclaimed Rubber	Comprises of both natural and synthetic reclaimed rubber.
p	Provisional

CONTENTS

d) Natural, Synthetic & Reclaimed Rubber

CHARTS AND DIAGRAMS