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VOL 80 . NO 12 . MAY 2022

## THE YEAR 2021-22

### NATURAL RUBBER (NR)

#### Production Sector

The overall performance of the rubber plantation industry during 2021-22 was very impressive. Natural Rubber (NR) production in the country improved to 775,000 tonnes during 2021-22 compared to 715,000 tonnes during 2020-21, recording a growth of 8.4 % compared to a growth of 0.4 % registered during the previous year. Along with the increase in yield, increase in tappable area and improvement in percentage of area tapped during the year have contributed to the appreciable increase in NR production. Interventions of the Board in promoting rainguarding & other appropriate agronomic practices, controlling diseases, promoting self tapping and in adopting more untapped area into tapping etc. need to be emphasised. Continuation of RPIS scheme and its enhancement to Rs.170/kg for sheet rubber and the remunerative price throughout the year were also some chipping factors in the improvement in production during the year. Though the tappable area under rubber was 718,800 ha during 2021-22, only 526,500 ha ( 73.2%) has contributed to the NR production during the year.

The average yield, measured in terms of production per hectare of tapped area increased to 1,472 kg/ ha in 2021-22 from 1,442 kg/ha in the previous year. During 2021-22, the country produced 63.4 % Ribbed Smoked Sheet (RSS), 20.0 % Technically Specified Rubber (TSR) and 14.1 % latex concentrates.

#### Consumption Sector

The domestic consumption of NR in 2021-22 was 1,238,000 tonnes, increased by 12.9 % from the quantity of 1,096,410 tonnes consumed during 2020-21. The auto tyre sector registered 15.9 % growth during 2021-22 as against 3.2 % recorded during 2020-21.

At the same time, the general rubber goods sector registered 5.6 % growth during 2021-22 compared to a high negative growth of 16.4 % recorded during 2020-21. Auto-tyre manufacturing sector accounted for 73.1 % of the total quantity of NR consumed in the country during 2021-22. Out of the total NR consumed by the industry, 41.7 % were RSS, 48.0 % TSR and 8.1 % latex concentrates in 2021-22.

#### Import & Export

As per data available from the Directorate General of Commercial Intelligence & Statistics (DGCI&S), the import of NR during 2021-22 increased by 33.1% to 546,369 tonnes from 410,478 tonnes during 2020-21. During 2021-22, 87.6% of the total NR import was in the form of block rubber. Among the source countries of imports of NR into India, Indonesia dominated with a share of 25.3% in the total volume imported during 2021-22, followed by Vietnam (24.4%) and Cote D'Ivoire (13.7%). Import of NR during the year 2021-22 is valued at Rs 7702.7 Crore.

The volume of NR Exports from the country decreased to 3,560 tonnes in 2021-22 from 11,343 tonnes in 2020-21. The country exported 43.0% Ribbed Smoked Sheet (RSS), 33.4% latex concentrates and 20.8 % Technically Specified Rubber (TSR) in 2021-22 and the main destination country was Sri Lanka. Export of NR during the year 2021-22 is valued at Rs 53.8 Crore.

#### Stock

The total stock of NR with growers, processors, traders and manufacturers at the end of March 2022 was estimated at 428,625 tonnes, inclusive of unprocessed forms of rubber held by growers, dealers and processors.

**Table I: PRICE OF NATURAL RUBBER (Rupees per 100 Kg)**

Month/year		RSS 5	RSS 4	RSS 3	Latex (60% drc)		ISNR 20	SMR 20
		Domestic		International	Domestic	International	Domestic	International
April	2021	16302	16665	16271	20493	19088	14724	12272
May	"	16686	16982	17168	20948	19182	15242	12401
June	"	16678	16922	15757	20567	17007	15677	12090
July	"	16583	16840	13647	21105	14872	15417	12247
August	"	17540	17736	13967	21597	15555	16411	12828
September	"	17164	17412	13120	20917	14858	16502	11994
October	"	16888	17114	13833	20473	15893	15964	13064
November	"	18054	18279	14418	22123	16720	16795	13080
December	"	17265	17590	14438	22253	16372	16272	12985
January	2022	15844	16216	14571	21507	17207	14823	13243
February	"	16175	16385	16042	21165	19977	15775	13486
March	"	16857	17076	17040	20415	21022	16224	13361
<b>Average 2021-'22</b>		<b>16836</b>	<b>17101</b>	<b>15023</b>	<b>21130</b>	<b>17313</b>	<b>15819</b>	<b>12754</b>

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

## PRODUCTION AND CONSUMPTION OF NR & SR

(Tonnes)

Type-wise Production & Consumption of NR & SR	March 2022	March 2021	April 2021 to March 2022	April 2020 to March 2021	Percentage increase (+)/ decrease (-) of (3) & (4)
	(1)	(2)	(3)	(4)	(5)
<b>PRODUCTION</b>					
<b>Natural Rubber (NR)</b>					
Ribbed Smoked Sheet (RSS)	24400	23050	491090	462915	
Solid Block Rubber	12750	13500	155125	143355	
Latex Concentrates (drc)	10700	8350	109250	88680	
Others	1150	1100	19535	20050	
<b>Total</b>	<b>49000</b>	<b>46000</b>	<b>775000</b>	<b>715000</b>	<b>8.4</b>
<b>Synthetic Rubber (SR)<sup>P</sup></b>					
Styrene Butadiene (SBR)	25395	23958	279295	236479	
Poly Butadiene(BR)	10500	11800	133000	128564	
Others	8150	7952	72870	63277	
<b>Total</b>	<b>44045</b>	<b>43710</b>	<b>485165</b>	<b>428320</b>	<b>13.3</b>
<b>Total NR &amp; SR</b>	<b>93045</b>	<b>89710</b>	<b>1260165</b>	<b>1143320</b>	<b>10.2</b>
<b>CONSUMPTION *</b>					
<b>Natural Rubber (NR)</b>					
Ribbed Smoked Sheet (RSS)	45040	57770	516275	522260	
Solid Block Rubber	56200	46000	594160	463860	
Latex Concentrates (drc)	8460	9880	100050	84645	
Others	2300	2850	27515	25645	
<b>Total</b>	<b>112000</b>	<b>116500</b>	<b>1238000</b>	<b>1096410</b>	<b>12.9</b>
Out of which Auto Tyre Manufacturers	77706	84694	904574 <sup>R</sup>	780588	<b>15.9</b>
<b>Synthetic Rubber (SR)<sup>P</sup></b>					
Styrene Butadiene (SBR)	32000	33000	376080	328420	
Poly Butadiene(BR)	19150	19850	222925	182000	
Others	9950	11635	124140	107580	
<b>Total</b>	<b>61100</b>	<b>64485</b>	<b>723145</b>	<b>618000</b>	<b>17.0</b>
Out of which Auto Tyre Manufacturers	41824	45822	507963 <sup>R</sup>	429295	<b>18.3</b>
<b>Total NR &amp; SR</b>	<b>173100</b>	<b>180985</b>	<b>1961145</b>	<b>1714410</b>	<b>14.4</b>
Out of which Auto Tyre Manufacturers	<b>119530</b>	<b>130516</b>	<b>1412537</b>	<b>1209883</b>	<b>16.7</b>

\*: indigenous and imported

R : Revised

**PRODUCTION CONSUMPTION AND STOCK OF RECLAIMED RUBBER (RR)**

(Tonnes)

Production Consumption and stock of RR	March 2022	March 2021	April 2021 to March 2022	April 2020 to March 2021
	(1)	(2)	(3)	(4)
<b>Reclaimed Rubber (RR)</b>				
Production <sup>@</sup>	12825	15150	151195	141180
Consumption	13350	14350	150470	139700
Out of which Auto Tyre Manufacturers	4652	5210	54515	48812
Stock with Manufacturers (end of month/year)	16600	15685		

@: indigenous purchase by manufacturers

**IMPORT & EXPORT OF DIFFERENT FORMS OF NR**

Type	IMPORT(p)		EXPORT(p)	
	2021-'22	2020-'21	2021-'22	2020-'21
RSS Grades	53650	48800	1530	369
Solid Block Rubber	478260	354070	740	1855
Latex Concentrates(drc)	10750	4100	1189	8663
Others	3709	3508	101	456
<b>Total</b>	<b>546369</b>	<b>410478</b>	<b>3560</b>	<b>11343</b>

**IMPORT OF SYNTHETIC RUBBER (p)**

	March 2022	March 2021	2021-'22	2020-'21
<b>Synthetic Rubber(SR)</b>	<b>25010</b>	<b>39633</b>	<b>341766</b>	<b>312438</b>

**STOCK AT THE END OF MARCH 2022**

(Metric tonnes)

<b>Natural Rubber</b>				
	Tradable	Total	Type	Total
With Growers	102000	120000	Ribbed Smoked Sheet	253185
With Dealers & Processors	112000	140000	Solid Block Rubber	115285
With Auto Tyre units <sup>@</sup>		133000	Latex(drc)	36800
With other manufacturing units		35625	Others	23355
<b>Total</b>	<b>214000</b>	<b>428625<sup>#</sup></b>	<b>Total</b>	<b>428625<sup>#</sup></b>

<sup>@</sup>: including stock in transit<sup>#</sup>: including unprocessed forms of NR kept with growers, dealers & processors

<b>Synthetic Rubber **</b>			
With Producers <sup>(d)</sup>	45425		
With Auto Tyre units	57000	SBR	109578
With other manufacturing units	33795	Others	26642
<b>Total</b>	<b>136220</b>	<b>Total</b>	<b>136220</b>

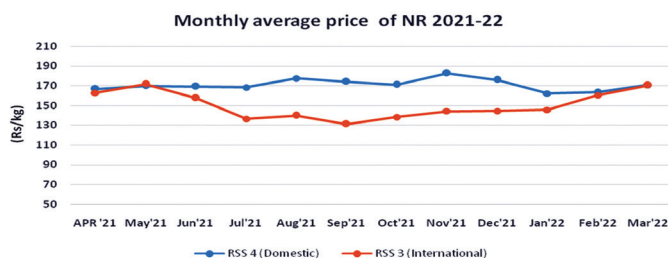
p : provisional

<sup>(d)</sup> : including their accredited stockists.**\*\*** : including export

### NR Prices

Annual average price for domestic RSS 4 grade rubber for the year 2021-22 was Rs 171.01 per kg compared to Rs141.85 per kg in 2020-21. During 2021-22, the average price of international RSS 3 grade was Rs 150.23 per kg while it was Rs 142.14 per kg during 2020-21. Domestic RSS 4 price peaked at Rs 191.00 per kg on 26 November 2021 and international price of RSS 3 peaked at Rs 176.22 per kg on 31 March 2022. Domestic price of all types of rubber were ruling above the international price throughout the year 2021-22, with exception for RSS 4 in May 2021 and for Latex in March 2022.

The chart depicting the monthly average price of RSS 4 in domestic market and that of RSS 3 grade in international market during the year 2021-22 is given below.



### SYNTHETIC RUBBER (SR)

#### Production & Consumption

Synthetic Rubber (SR) production increased to 485,165 tonnes during 2021-22 from 428,320 tonnes during 2020-21, registering a growth of 13.3% as against a growth of 7.4% during 2020-21. During 2021-22, shares of styrene butadiene rubber and poly-butadiene rubber were 57.6% and 27.4% respectively. Reclaimed rubber production during 2021-22 was 151,195 tonnes as against 141,180 tonnes produced during 2020-21.

SR consumption increased to 723,145 tonnes during 2021-22 recording a positive growth of 17.0% as against 618,000 tonnes consumed during 2020-21. The Auto tyre sector consumed 507,963 tonnes of SR during 2021-22 as against 429,295 tonnes during 2020-21, recording a high positive growth of 18.3%. During 2021-22, the ratio of consumption between NR and SR in India was 63:37. Consumption of RR during 2021-22 was 150,470 tonnes compared to 139,700 tonnes consumed during 2020-21.

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

**Table II: CONSUMPTION OF NR AND SR**

	2021-22p (tonnes)	2020-21 (tonnes)	Growth (%)
<b>Natural Rubber</b>			
Auto Tyres & Tubes	904574	780588	15.9
General Rubber Goods	333426	315822	5.6
<b>Total NR</b>	<b>1238000</b>	<b>1096410</b>	<b>12.9</b>
<b>Synthetic Rubber</b>			
Auto Tyres & Tubes	507963	429295	18.3
General Rubber Goods	215182	188705	14.0
<b>Total SR</b>	<b>723145</b>	<b>618000</b>	<b>17.0</b>
<b>NR &amp; SR</b>			
Auto Tyres & Tubes	1412537	1209883	16.7
General Rubber Goods	548608	504527	8.7
<b>Total NR &amp; SR</b>	<b>1961145</b>	<b>1714410</b>	<b>14.4</b>

p: provisional

Import of SR by rubber goods manufacturing industry during 2021-22 increased to 341,766 tonnes compared to 312,438 tonnes during 2020-21.

### Global Rubber Scenario - 2021

#### Production

According to the International Rubber Study Group (IRSG), world NR production during 2021 was 13.770 million tonnes compared to 13.065 million tonnes produced in 2020, registering a positive growth of 5.4%. During 2021, NR production in main producing countries viz; Thailand, Indonesia, Vietnam, Cote d'Ivoire, China and India increased whereas production in Malaysia decreased when compared to 2020.

**Table III: COUNTRY-WISE PRODUCTION OF NR**

('000 tonnes)

Country	2021	2020	% Growth
Thailand	4836	4787	1.0
Indonesia	3045	3037	0.3
Vietnam	1260	1226	2.8
Cote d'Ivoire	965	950	1.6
China	851	693	22.8
<b>India</b>	<b>757</b>	<b>685</b>	<b>10.5</b>
Malaysia	470	515	-8.7
Other Countries	1586	1172	35.3
<b>World Total</b>	<b>13770</b>	<b>13065</b>	<b>5.4</b>

Source: Natural Rubber Statistics – May 2022 of Association of NR producing Countries (ANRPC) for country-wise figures and Rubber Statistical Bulletin (April-June 2022) of International Rubber Study Group (IRSG) for world total

#### Consumption

World NR consumption increased to 13.978 million tonnes in 2021 recording a positive growth of 10.2%, compared to 12.689 million tonnes in 2020. Consumption of NR in main consuming countries viz. China, India, USA, Thailand, Japan, Indonesia, Brazil, Republic of Korea and Vietnam increased during 2021 compared to previous year, whereas NR consumption in Malaysia decreased during 2021 compared to 2020.

**Table IV: COUNTRY-WISE CONSUMPTION OF NR**

('000 tonnes)

Country	2021	2020	% Growth
China	5665	5441	4.1
<b>India</b>	<b>1257</b>	<b>1040</b>	<b>20.9</b>
U.S.A.	960	802	19.7
Thailand	809	764	5.9
Japan	678	581	16.7
Indonesia	584	573	1.9
Malaysia	502	517	-2.9
Brazil	418	345	21.2
Rep. of Korea	339	298	13.8
Vietnam	330	240	37.5
Other countries	2436	2088	16.7
<b>World Total</b>	<b>13978</b>	<b>12689</b>	<b>10.2</b>

World SR consumption increased to 15.808 million tonnes during 2021 from 14.228 million tonnes during 2020, recording a positive growth of 11.1%. World NR and SR consumption ratio during 2021 was 47:53 which was same as in 2020.

According to IRSG, the world supply-demand balance of NR showed a deficit of 208,000 tonnes during 2021.

Source: Rubber Statistical Bulletin (April-June 2022) of International Rubber Study Group (IRSG).