Dato' Dr. Kamarul

天然橡胶生产国协会秘书长

自2011 年7 月1 日起， Dato' Dr. Kamarul 开始担任天然橡胶生产国协会秘书长一职，任期为三年。此前，他曾担任马来西亚橡胶局局长。

Dato' Dr. Kamarul 本科专业是机械工程学，毕业于斯特拉斯克莱德大学，并获得了英国拉夫堡大学高分子工程学专业的博士学位。1976 年，他开始参加工作，在马来西亚橡胶研究所担任研究员。他在橡胶行业工作拥有37 年的经验，曾先后从事研发、管理、立法与执法、财经、配套服务、市场营销与培训方面的工作。他曾先后担任国际橡胶贸易协会会长、马来西亚橡胶交易所主席、英国TAR橡胶研究中心主任、国际橡胶研发委员会委员以及工程橡胶制品标准制定技术委员会主席。专著及合著的与天然橡胶科技及工程用途相关的技术论文和报告达70 篇。

"Global Supply and Demand of Natural Rubber"

11th Shanghai Derivatives Market Forum 2013

29th May 2014

Grand Tower, Shangri-La, Pudong
Shanghai, China

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Overview of Presentation;

1. *Production and Supply of NR by ANRPC MGs*
2. *Challenges and and Strategies in NR Production*
3. *Consumptions of*
4. *Trends in NR Prices*
5. *Outlooks of Future Demand of NR*
6. *Conclusions*

Production and Supply of NR by ANRPC Member Countries

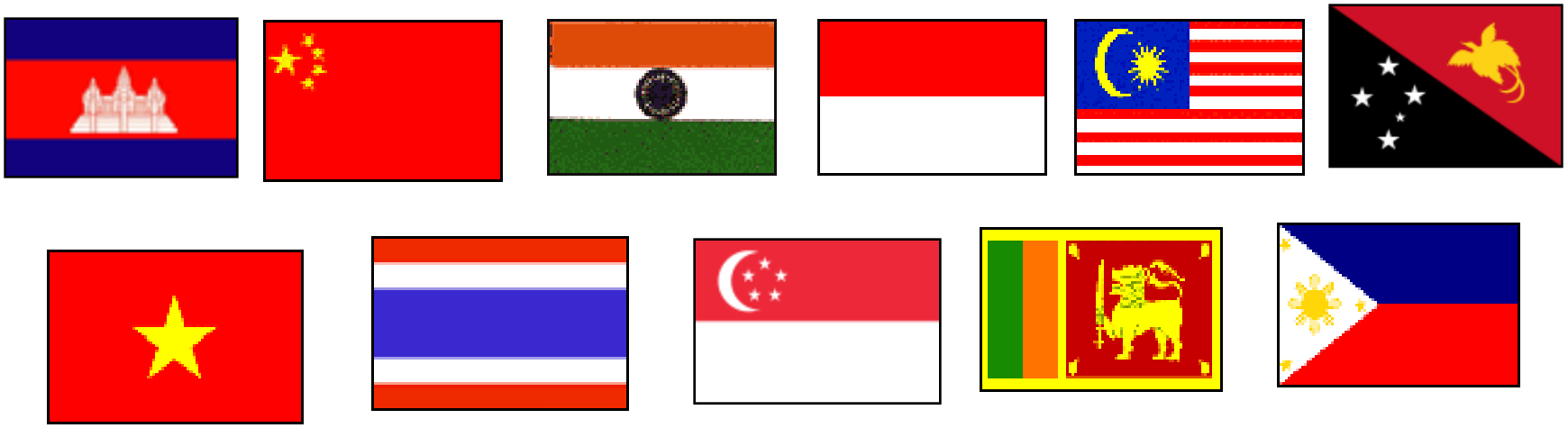
Association of Natural Rubber Producing Countries (ANRPC) - *www.anrpc.org*

ANRPC - www.anrpc.org

Inter-governmental organizations of countries producing natural rubber.

Establish 1970, HQ - Kuala Lumpur, MALAYSIA

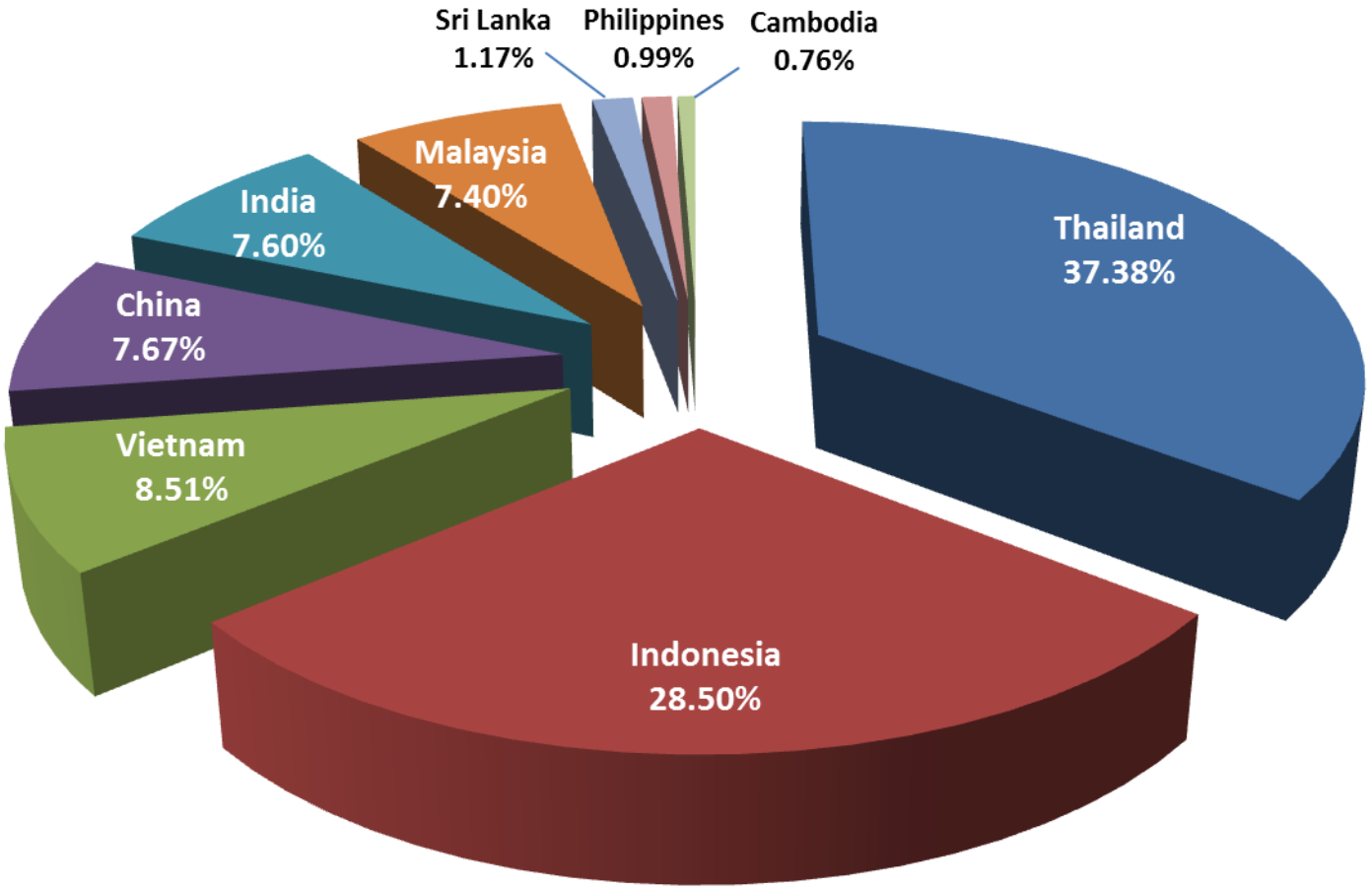
Currently - 11 member governments



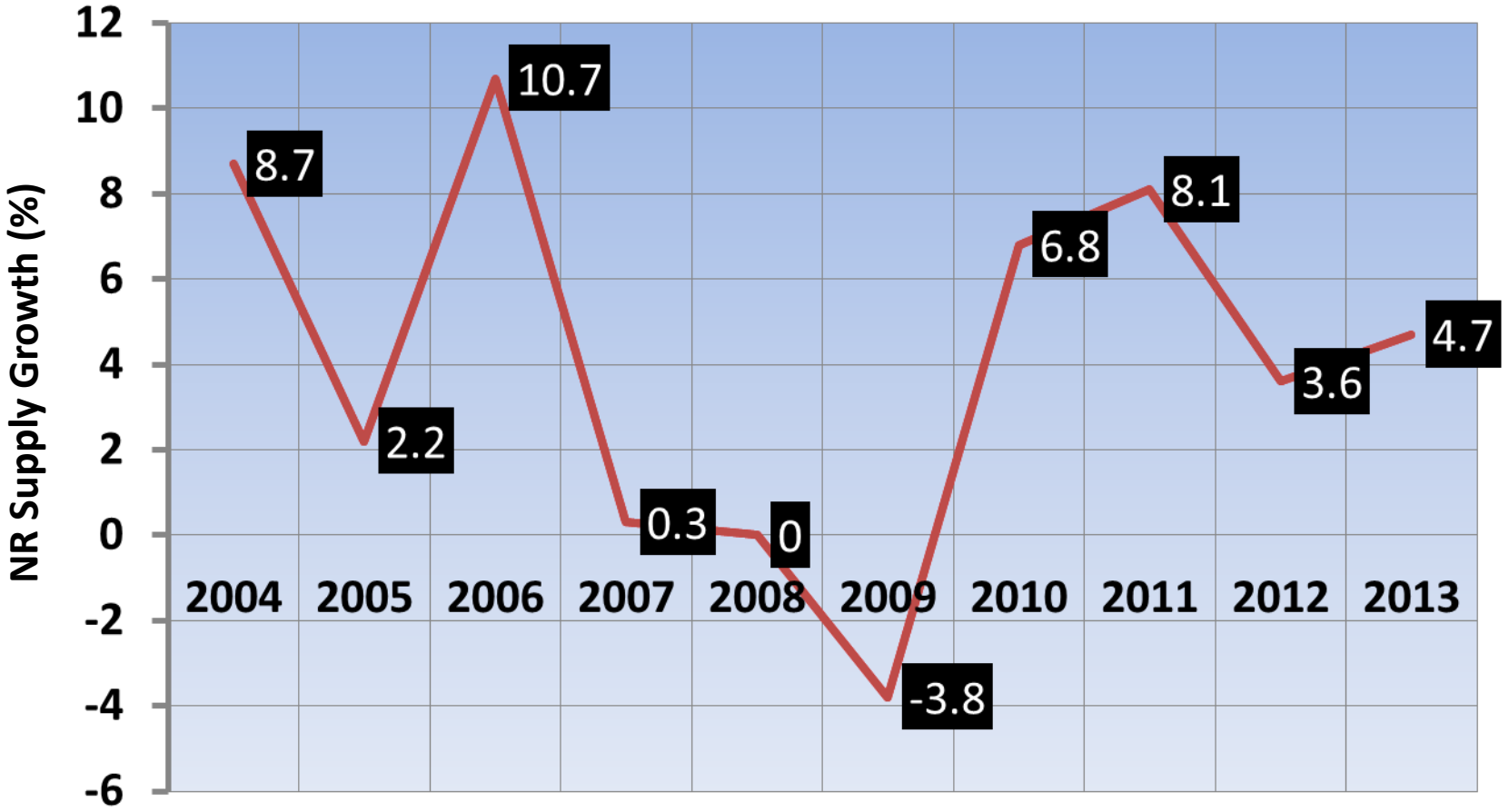
NR Supply by Members of ANRPC in 2013

- *Production – 11.157 mil ton (Global 93%)*
- *Yield area - 7.833 mil ha*
- *Total area planted – 11.588 mil ha*
- *Average yield - 1,424 kg/ha/yr*
- *90 % production by smallholdings*

2013: Production 11.157 mil tons



Annual Rate of Growth in NR Supply (%)



Monthly Trends in Production of NR from ANRPC

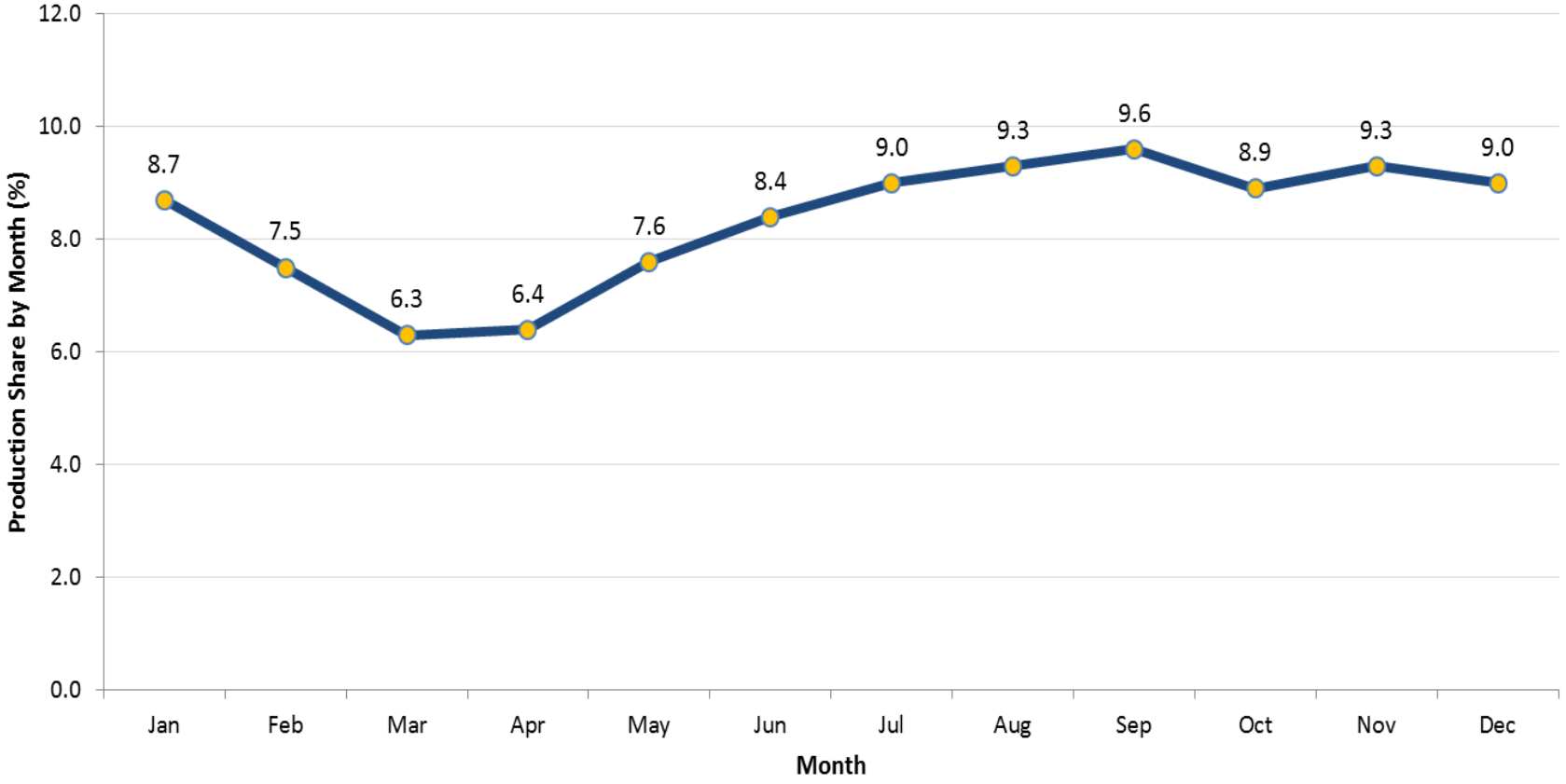
Month	Production in 2011 (' 000 tons)	Production in 2012 ('000 tons)	% change on year	Production in 2013(1) ('000 tons)	% change on year
January	945	869	-8.1	936	7.7
February	775	789	1.8	685	-13.2
March	631	708	12.2	798	12.7
Q_1 Total	2,351	2,366	0.6	2,419	2.2
April	599	721	20.4	735	1.9
May	762	882	15.8	779	-11.7
June	928	898	-3.2	928	3.4
Q_2 Total	2,289	2,501	9.3	2,442	-2.4
July	939	952	1.3	1001	5.2
August	937	968	3.4	1019	5.2
September	895	1017	13.7	1051	3.4
Q_3Total	2,771	2,937	6.0	3,071	4.6
October	922	966	4.7	1008	4.4
November	994	1005	1.2	1048	4.3
December	998	870	-12.8	998	14.6
Q_4Total	2,914	2,841	-2.5	3,054	7.5
Year Total	10,280	10,653	3.8	11,157	4.7

Sources of Rise in NR Production

	2010	2011	2012	2013
Tapped Area ('000 ha)	7,013	7,255	7,526	7,833
Average yield (kg/ha)	1,356	1,423	1,414	1,424
Production ('000 tons)	9,510	10,280	10,653	11,157

SEASONALITY IN MONTHLY NR PRODUCTION

AVERAGE MONTHLY PRODUCTION IN ANRPC MEMBER COUNTRIES (2010 – 2012)



SEASONALITY IN MONTHLY NR PRODUCTION BY COUNTRIES

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Peak	Thailand Malaysia		Sri Lanka				Indonesia		China		Vietnam	India Cambodia Philippines
Dip		Indonesia China Cambodia	Vietnam India Philippines	Thailand Malaysia	Sri Lanka							

Global NR Production ('000 tons)

	2010	2011	2012	2013	% Change
ANRPC	9,510	10,280	10,653	11,157	4.7
Non - ANRPC	698	742	775	817	5.4
Total	10,208	11,022	11,428	11,974	4.8

Challenges and Strategies in NR Production

Challenges and Strategies in NR Production

5th and 6th ANRPC Annual Conferences:

- ***17th October 2012 in Medan Indonesia***
- ***9th October 2013 in Colombo, Sri Lanka***

Members Countries identified:

- ❖ **Challenges and Constraints**
- ❖ **Governments - Policies and Strategies**

NR Supply Challenges

1. *Small land size - 0.2 < 1 > 2.3 hectares*
2. *Selection of planting materials*
3. *Level of "good agriculture practices"*
4. *High productivity, Quality material*
5. *Bridging/narrowing technology gap*
6. *Governments incentives*
7. *Enticing industry into production*
8. *NR Prices*
9. *Climatic constraints*
10. *Sustainability*
11. *Other sources of NR*

Policies and Strategies

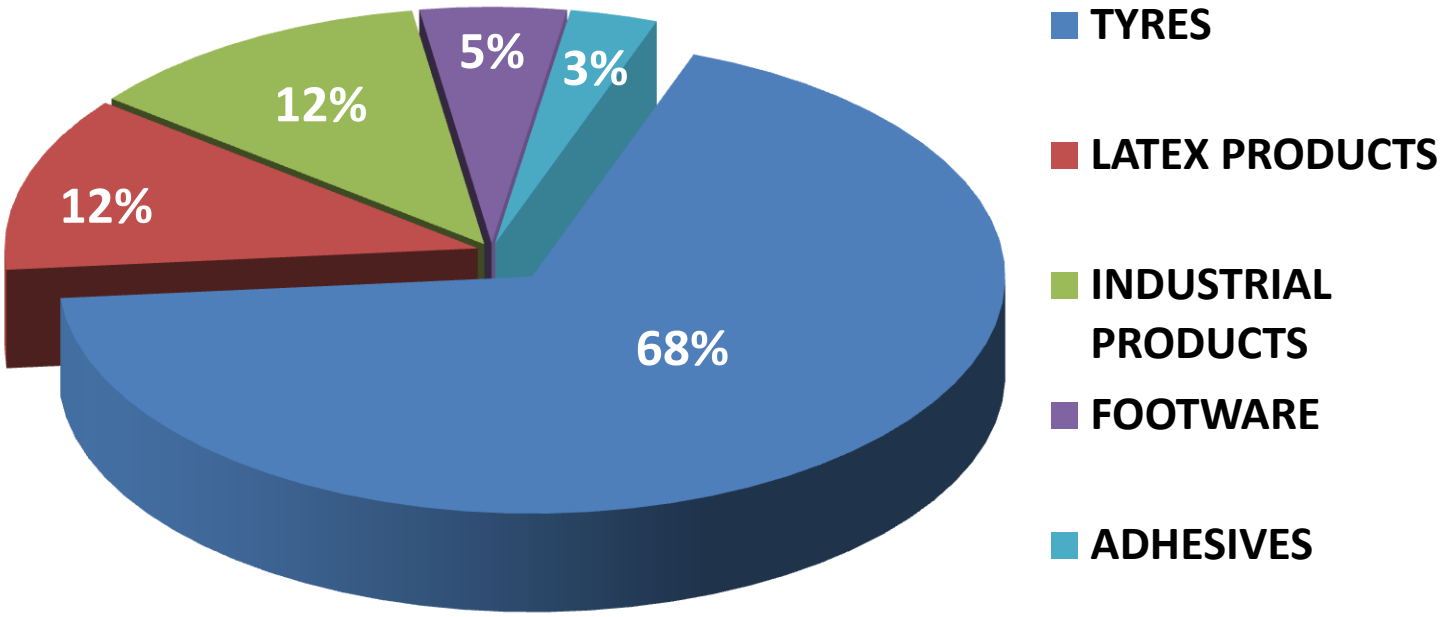
- Enhance production and productivity
  - Governments subsidy for planting materials (> 30 % cost)
  - Governments introduction of regulatory measures on clonal materials
  - Governments effort to intensify effective extension programmes
  - Increase numbers of demonstration plots
  - Encourage smallholders to form and adopt cooperative system
  - Productivity target ≥ 2000kg/ha/yr
- Replanting implementation programmes
  - Restructure and monitor cooperation among governments agencies
  - Governments support during gestation period
  - Define policy on replanting (hectares/yr., financial aids)
  - Targets hectarage for replanting (20,000 – 40,000) ha/yr
- Advancement of R & D
  - Plant breeding, biotechnology, technology of harvesting
  - Development of new materials

Policies and Strategies

- Expansion of planting hectarage in suitable areas
  - In non-traditional areas
  - Farmers and private sector for joint development (SOC and farmers)
  - Entice private sectors to invest in rubber sectors(Tax incentives..)
- Labour Shortage
  - Improve working conditions in rubber production (LITS)
  - Higher income to discourage urban migration
  - Create business and enterprise opportunities in rubber sector
  - Formalized training
  - Encourage mechanization
- Quality awareness programmes
  - Educating farmers on importance of quality
  - Reform to acceptance and receptive culture by farmers

Consumption of NR

Sectorial Use of Natural Rubber



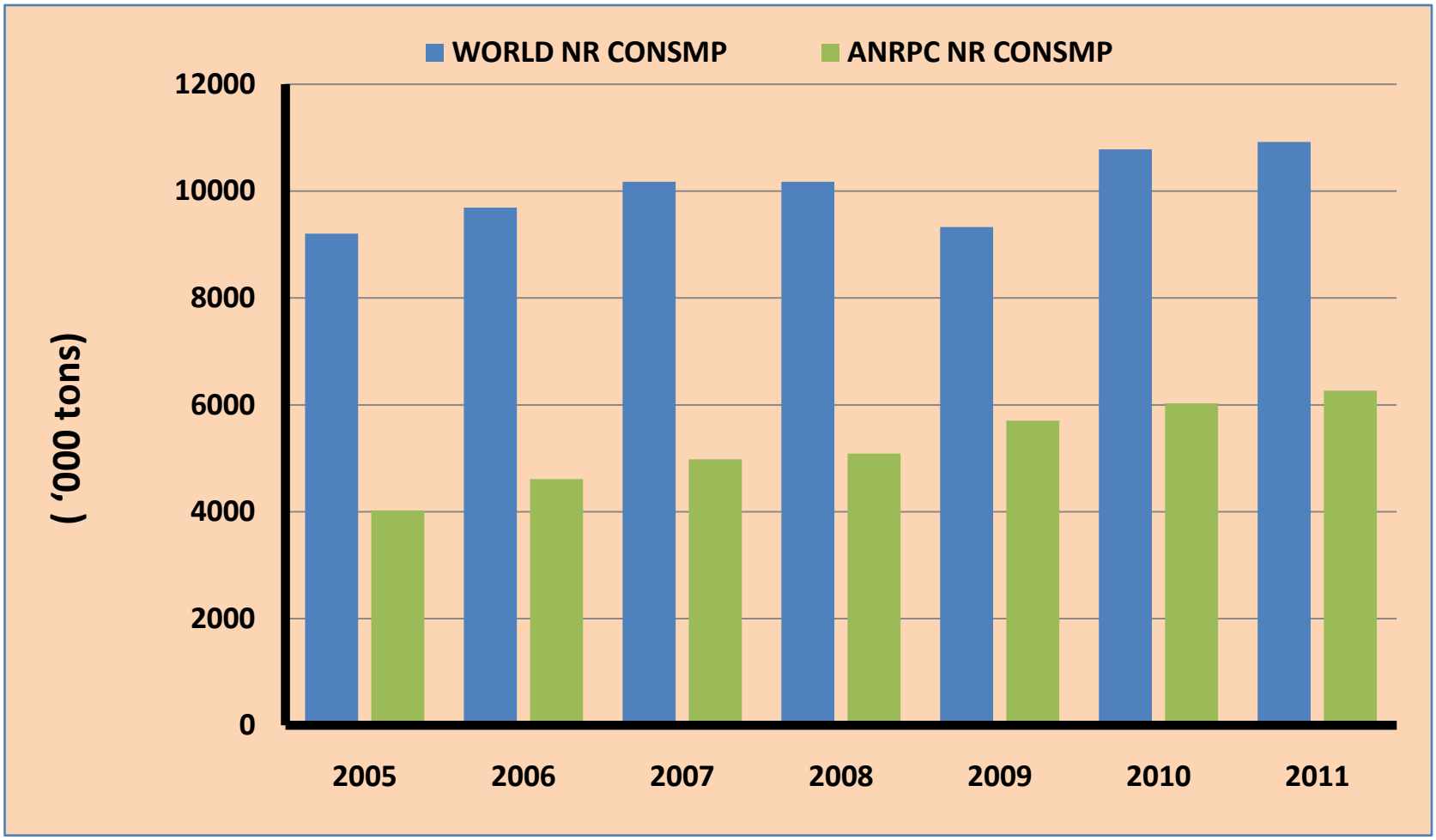
Use of Natural Rubber in Tyres

- Approx. 70 % NR global supply use for tyres
- Tyres - OEM (30%) ,REM (70%)
- Global Market 20% annual growth in value for 2008 - 2011 (ERJ)
- Passenger Cars - Ratio of SR:NR varies
- Light & Heavy Vehicles - High NR
- Aviation - Higher NR

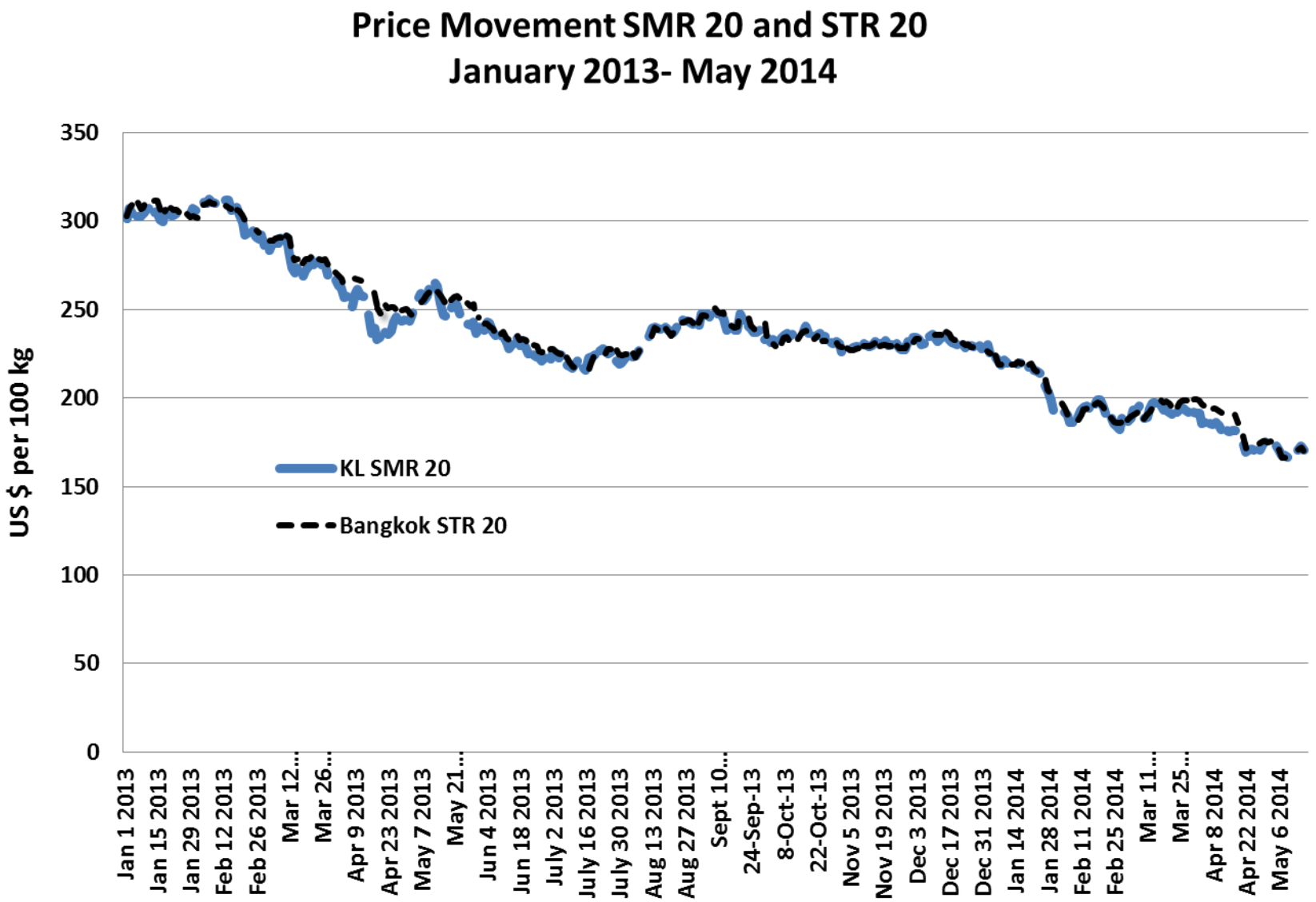
Consumption of NR in ANRPC's Member Countries, Jan- Sept 2013

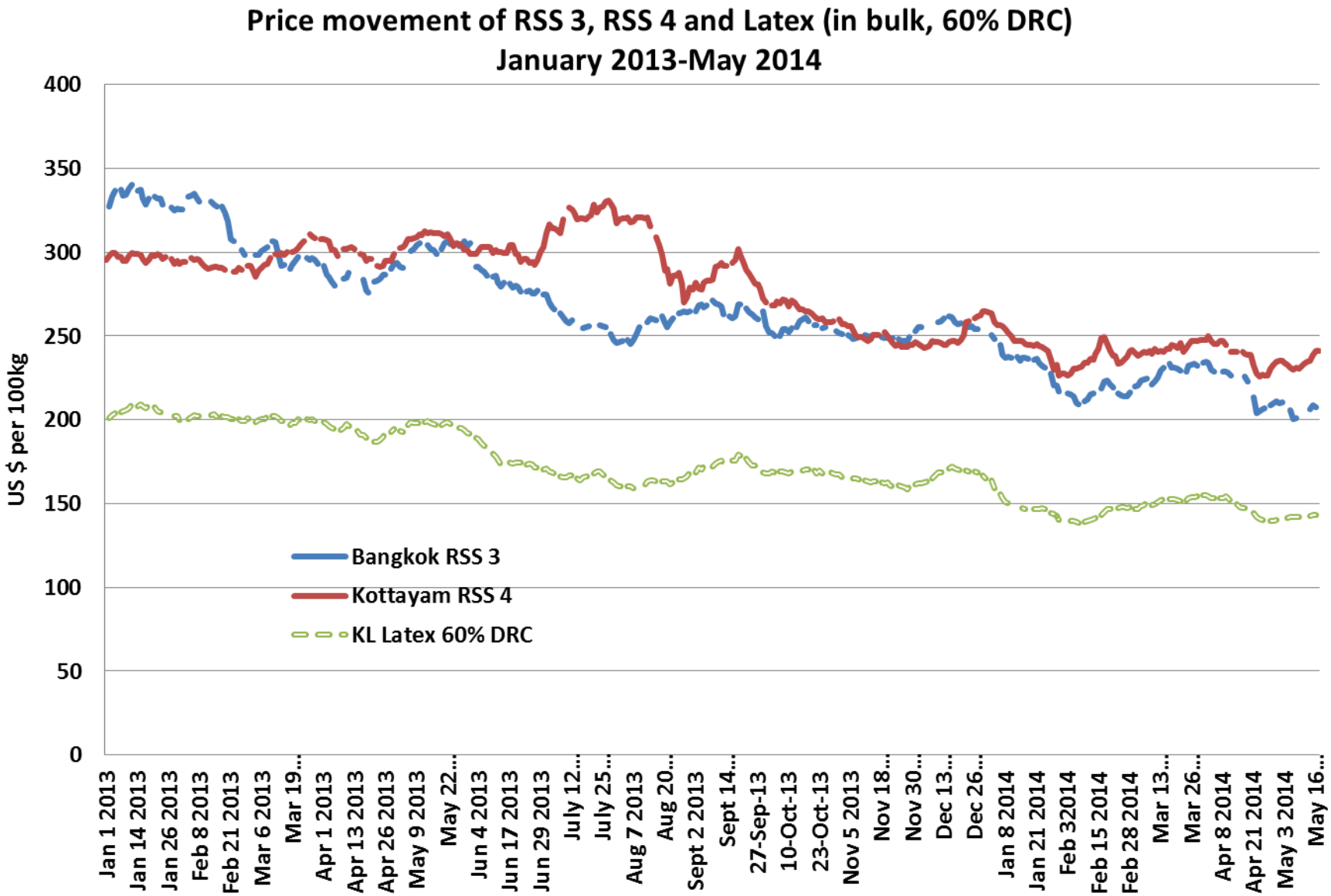
Country	Consumption				
	2011 ('000 tons)	2012 ('000 tons)	% Change On year	2013 ('000 tons)	% Change On year
China	3,602	3,834	6.4	4,180	8.2
India	958	988	3.1	959	-2.9
Indonesia	474	548	15.6	603	10.0
Thailand	487	505	3.7	521	3.0
Malaysia	419	459	9.5	447	-2.5
Vietnam	145	150	3.4	155	2.7
Sri Lanka	112	110	-1.8	107	-2.6
Philippines	64	72	12.5	70	-1.9
Cambodia	0	0	-	0	-
Total	6,261	6,666	6.5	7,021	5.3

Global NR Consumption in 2005 - 2011



Trends in Prices of NR


Price Movement SMR 20 and STR 20
January 2013- May 2014
US $ per 100 kg
350
300
250
200
150
100
50
0
KL SMR 20
Bangkok STR 20
Jan 1 2013
Jan 15 2013
Jan 29 2013
Feb 12 2013
Feb 26 2013
Mar 12...
Mar 26...
Apr 9 2013
Apr 23 2013
May 7 2013
May 21...
Jun 4 2013
Jun 18 2013
July 2 2013
July 16 2013
July 30 2013
Aug 13 2013
Aug 27 2013
Sept 10...
24-Sep-13
8-Oct-13
22-Oct-13
Nov 5 2013
Nov 19 2013
Dec 3 2013
Dec 17 2013
Dec 31 2013
Jan 14 2014
Jan 28 2014
Feb 11 2014
Feb 25 2014
Mar 11...
Mar 25...
Apr 8 2014
Apr 22 2014
May 6 2014


Price movement of RSS 3, RSS 4 and Latex (in bulk, 60% DRC)
January 2013-May 2014
US $ per 100kg
400
350
300
250
200
150
100
50
0
Bangkok RSS 3
Kottayam RSS 4
KL Latex 60% DRC
Jan 1 2013
Jan 14 2013
Jan 26 2013
Feb 8 2013
Feb 21 2013
Mar 6 2013
Mar 19...
Apr 1 2013
Apr 13 2013
Apr 26 2013
May 9 2013
May 22...
Jun 4 2013
Jun 17 2013
Jun 29 2013
July 12...
July 25...
Aug 7 2013
Aug 20...
Sept 2 2013
Sept 14...
27-Sep-13
10-Oct-13
23-Oct-13
Nov 5 2013
Nov 18...
Nov 30...
Dec 13...
Dec 26...
Jan 8 2014
Jan 21 2014
Feb 32014
Feb 15 2014
Feb 28 2014
Mar 13...
Mar 26...
Apr 8 2014
Apr 21 2014
May 3 2014
May 16...

Price (USD/100kg)	Kuala Lumpur	Bangkok	Bangkok	Kottayam	KL Latex
	SMR 20	**STR 20**	**RSS 3**	**RSS 4**	**(60% DRC)**
On 2 Jan 2013	301.35	302.85	327.27	297.85	201.01
On 2 Jan 2014	229.9	226.66	250.53	263.3	163.94
Percentage Change Jan 2013-Jan 2014	**-24%**	**-25%**	**-23%**	**-12%**	**-18%**
On 16 May 2014	170.35	170.28	207.39	241.25	142.95
Percentage Change Jan 2014-May 2014	**-26%**	**-25%**	**-17%**	**-8%**	**-13%**

NR Producers - > 90%
are smallholders

Response of NR Supply to Price Fall

- **Farmers will reduce harvesting intensity, input application, stimulation and rain-guarding.**
- **They may abandon low-yielding and aged trees, especially in Malaysia and Indonesia**
- **Aged trees become more uneconomic, prompting farmers to replant them**

  As replanting rate goes up, yielding area comes down

Response of NR Supply to Price Rise

- **Usually, a high price prompts farmers to have more output**

  This works only when the price rises after staying low for a few years.

- **The current scenario is different**

Farmers have already exploited all available options for increasing output from existing trees, further space is very much limited.

- **Wages and other input costs rose substantially in the last couple of years.**

- **Farmers profit margin is on the decline, despite high prices.**

- **Farmers enthusiasm is likely to erode even if prices continue to stay high.**

Outlooks of Future Demand of NR

Outlook of Global GDP Growth

	2012	2014	2016	2018
World Output	**2.6**	**3.0**	**3.8**	**3.8**
NAFTA Economies	2.7	2.4	3.4	2.8
Western Europe	-0.3	1.5	1.8	1.7
European Union	-0.3	1.5	2.0	1.9
Euro Zone	-0.6	1.1	1.7	1.6
Central Europe & Balkan	1.2	2.8	2.6	2.3
Commwlth of Ind. States	3.4	1.4	3.5	3.7
Japan	1.4	1.4	0.9	1.3
China	7.7	7.5	7.4	7.6
India	4.7	5.3	6.5	7.4
South Korea	2.3	3.3	3.6	3.4
Latin America n Caribbean	2.4	2.1	3.6	4.0
Middle East	2.8	3.6	4.5	4.5

Source – IHS Economics April 2014

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- Tyres - OEM (30%) ,REM (70%)
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Use of Natural Rubber in Tyres

- Radialisation - Increase use of NR,PC n CV
- Tyre Labeling - Increase/decrease use of NR??
- Retreading options
- Single Wide load Vs Double wheel Tyres - CV
- Performance Tyres - > 17" diameter
- Expansion / Investment by Tyre Manufacturers

  USD10 bil in 2011 by Hankook,Bridgestone, Continental,Michelin, Pirelli, Goodyear…

NR Supply Opportunities

1. *Currently total planted area of 10.62 mil ha. available lands for expansion by ANRPC members*
2. *Improvement in productivity and farm management*
3. *Accelerate utilization of R&D findings and advancement in NR science*
4. *Positive strategies and policies for sustainable NR supply by member countries*
5. *High domestic/regional consumption - China, India, Malaysia, Thailand*
6. *Substantial GDP growth in NR producing and emerging economies countries*

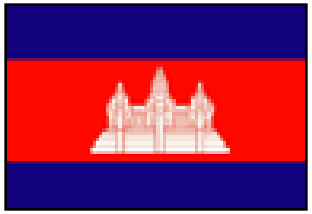
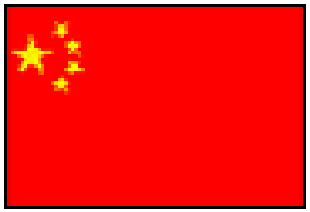
Conclusions

- ***The NR demand growth in tandem with global GDP growth. Positive for world GDP of 3.0 % in 2014 to 3.8 % in 2018 growth.***

- ***Consumption of NR in ANRPC has shown to grow from 43% in 2005 to 63% in 2013 of total Global NR Consumption. Future increase in NR consumption is expected.***

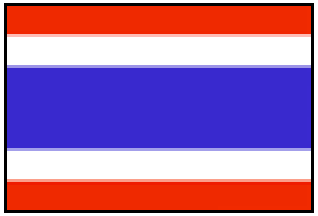
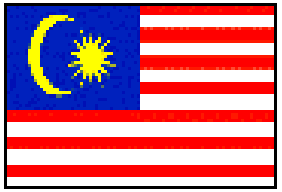
Conclusions …

- ***Opportunities for positive supply growth of NR are encouraging and sustainable by ANRPC's members***
- ***ANRPC's members take position on balance between future global supply and demand of NR***
- ***NR prices have shown to decrease ranging from -24 % to -26 % from January 2013 to May 2014. Not favourable to NR producing countries.***



THE ASSOCIATION OF NATURAL RUBBER PRODUCING COUNTRIES
ANRPC

Thank You