



Friday, August 4, 2023

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In March , China's natural rubber imports reached nearly 600,000 tons, a new high for the year, showing a double growth trend year-on-year; in terms of rubber types, mixed rubber and natural latex both showed an upward trend year-on-year. Looking at April , China's natural rubber imports may show a seasonal downward trend but are still at a relatively high level in the same period in history.

1. China's natural rubber imports increased year-on-year in **March**

Customs statistics show that in March China imported a total of 598,200 tons of natural rubber (including latex and mixed rubber), an increase of 3.5% month-on-month and an increase of 11.75% year-on-year . In the first quarter of 2023 , China imported a total of 1.7253 million tons of natural rubber (including latex and mixed rubber), an increase of 12.46% over the same period last year .

2 . Analysis of China's natural rubber imports by rubber type in **March**



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29.03% year-on-year . The largest year-on-year increase in March was mixed rubber, with a year-on-year increase of 29.29 % . After the Spring Festival, the non-standard basis continued to narrow, and the import of mixed rubber remained at a high level under the support of arbitrage demand. Imports of natural latex in March also maintained a year-on-year growth trend, with imports of 58,200 tons in March , an increase of 17.07% year-on-year . Except for mixed rubber and natural latex, other types of rubber showed a downward trend year-on-year.

2.1 Imports of mixed rubber fell by 2.07% month-on-month and increased by 29.29% year-on-year

In March , the import volume of mixed rubber increased significantly year-on-year, and the main imports came from Thailand and Vietnam, which accounted for as high as 83% . From the perspective of the top 5 countries in terms of import volume , the import volume of Thailand's mixed rubber was 197,300 tons, an increase of 10.04% month-on-month and a year-on- year increase of 58.27 % ; the import volume of Vietnam's mixed rubber was 90,900 tons, a seasonal decline of about 22.23% month-on-month , and a year-on-year



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Chinese market, resulting in a high import volume in the Chinese market.

2.2 The import volume of standard rubber increased by 12.89% month-on-month and decreased by 9.12% year-on-year

3月标准胶进口17.45万吨，处于历史同期相对高位水平。主要进口来源国是泰国、科特迪瓦，两者进口量占标准胶总进口量的55.3%。从进口量前6国来看，泰国标准胶进口量5.44万吨，环比增长1.81%，同比减少25.72%；科特迪瓦标准胶进口量4.21万吨，环比增加29.34%，同比增长20.15%，处于历史单月进口最高水平。3月印尼标准胶进口2.9万吨，同环比增加明显。3月份同比涨幅最大的是缅甸，总进口1.36万吨，同比增长119%。

综上所述，3月中国天然橡胶进口量延续季节性上涨趋势。从近5年天然橡胶月度进口量来看，4月进口量大概率会呈现环比下滑趋势，主要是因为海外尚未进入新一轮开割，出口压力不大；而国内多以消化库存为主。但预计4月进口量或依然维持同期相对高位水平，一方面来自于国内套利需求支撑；另一方面国际需求弱势，出口压力依然向中国市场转移，支撑进口量维持历史同期较高水平。

Source: Zhuo Chuang Information



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