

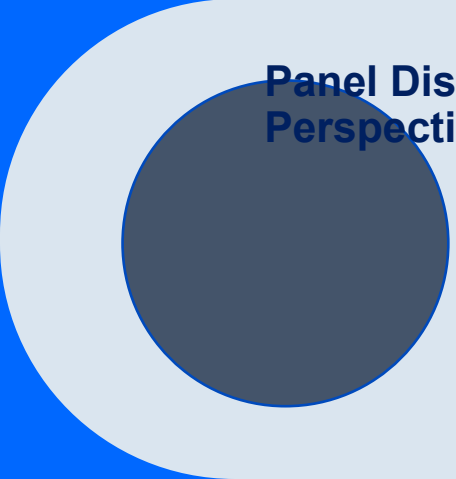


# **TSR PROCESSING IN INDIA**

## **CHALLENGES & OPPORTUNITIES**

**Presented by: IBRA @ IRM 2024**

**Panel Discussion on Indian Scenario: ‘Challenges & Opportunities from Stakeholders Perspective’**



# Agenda



Introduction



NR Statistics



Challenges &  
Oppurtunities



Focus Areas



Plans

# Introduction

Indian demand for Natural Rubber is showing a growth trajectory. However, Production is lagging behind and Imports are the only way to fill the gaps.

A look at the Statistics about Production, Consumption & Imports should through light on what should be the focus areas for the future, if India has to have a control over the Supply Chain of Natural Rubber to support its growing Rubber Product Manufacturing Industry.

# NR TYPES



## RSS

Ribbed Smoked Sheet



## TSR

Technically Specified  
Natural Rubber



## LATEX

Field Latex/Centrifuged  
Latex



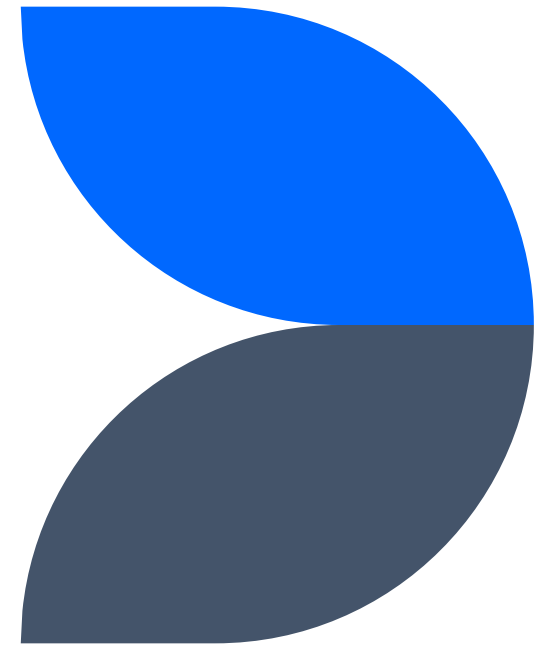
## Crepe Rubber

Estate Crepes

# Key Statistics

NR : TYPE WISE IMPORT,  
CONSUMPTION & IMPORT

*Source: 21<sup>st</sup> Statistical Consultative Panel, Rubber Board of  
India*

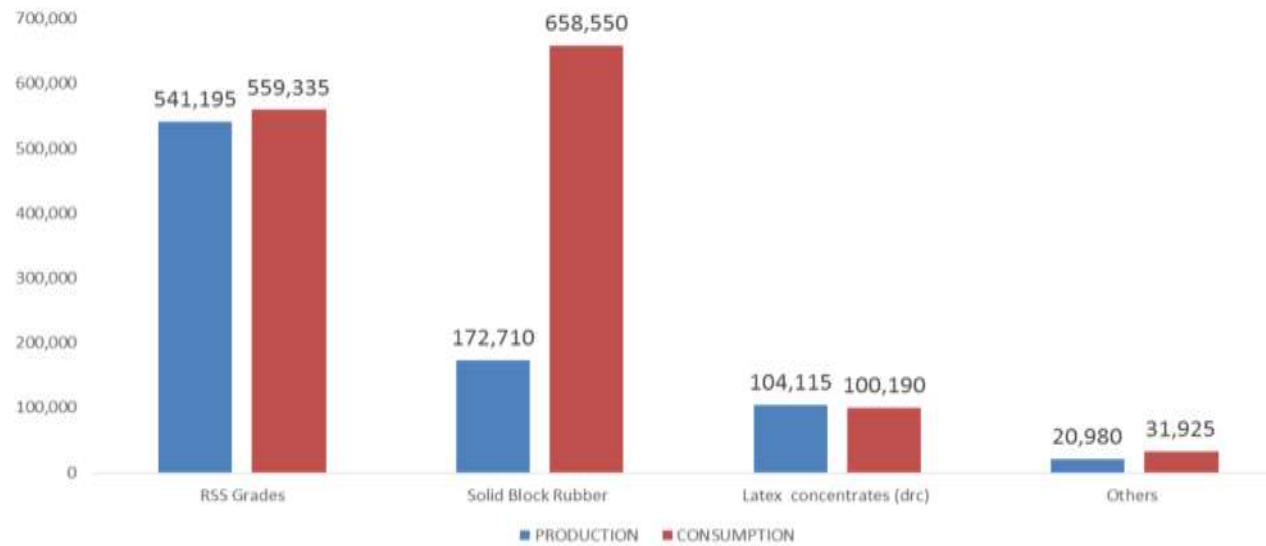


# NR IMPORT - TYPEWISE

Type-wise Import of NR (Tonnes)							
Type	2022-23p	2021 -22	% growth	2020 -21	% change of 22-23 with 20-21	2019 -20	% change of 22-23 with 19-20
Sheet	44,460	53,650	-17.1	48,800	-8.9	66,883	-33.5
Solid Block Rubber	474,050	478,260	-0.9	353,670	34.0	379,650	24.9
Latex concentrates (drc)	6,250	10,750	-41.9	4,500	38.9	8,845	-29.3
Others	3,917	3,709	5.6	3,508	11.7	1,845	112.3
<b>Total</b>	<b>528,677</b>	<b>546,369</b>	<b>-3.2</b>	<b>410,478</b>	<b>28.8</b>	<b>457,223</b>	<b>15.6</b>

# NR – TYPEWISE PRODUCTION & CONSUMPTION

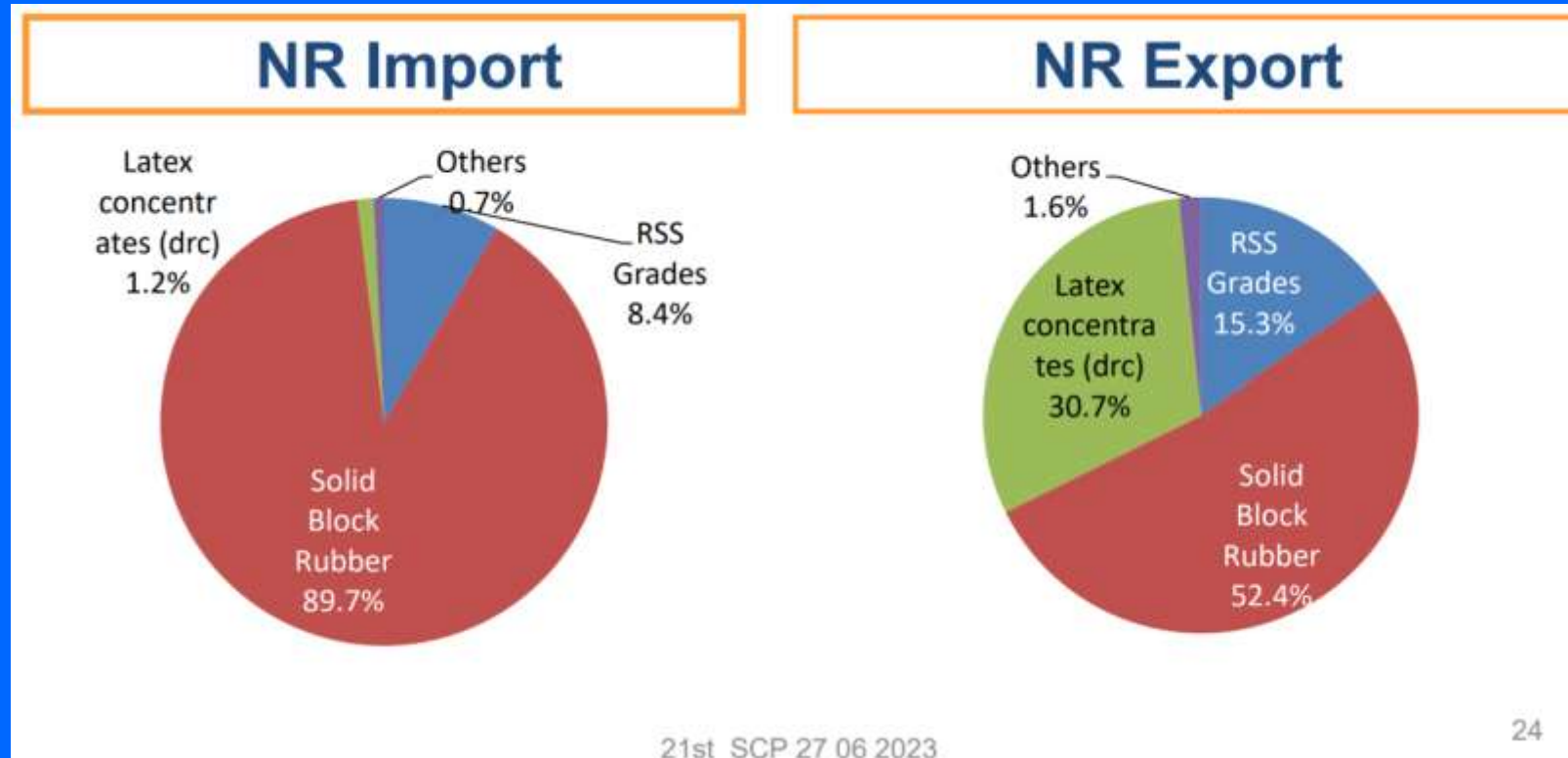
Type-wise composition of NR Production & Consumption  
2022-2023 (Tonnes)



21st SCP 27 06 2023

15

# NR IMPORT & EXPORT - TYPEWISE





# NR IMPORT – COUNTRY WISE

Country-wise import of NR- 2022-23p

Country	Quantity (Tonnes)	% share
Cote d'Ivoire	121046	22.9
Vietnam	115388	21.8
Indonesia	109599	20.7
Malaysia	74307	14.1
Thailand	56219	10.6
Ghana	14818	2.8
Singapore	14184	2.7
Myanmar	11288	2.1
Nigeria	3895	0.7
Other Countries	7933	1.5
<b>Total</b>	<b>528677</b>	<b>100</b>

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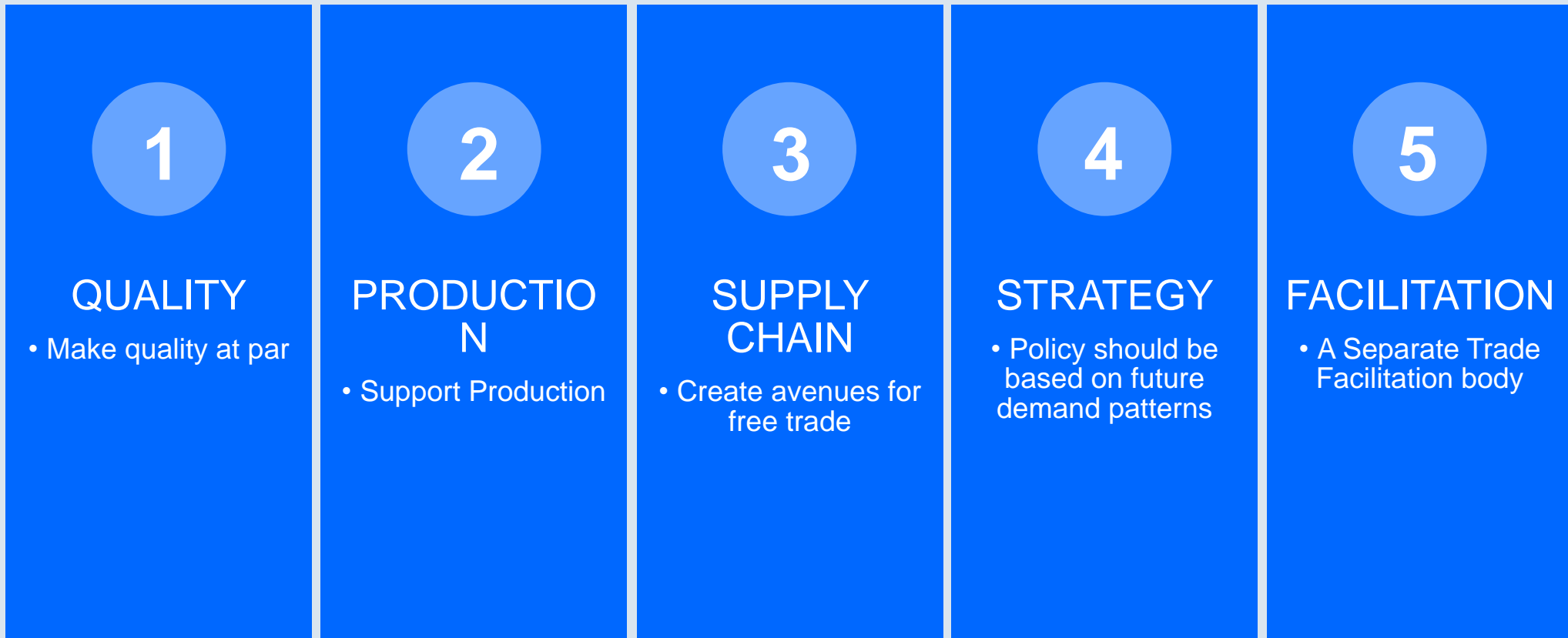
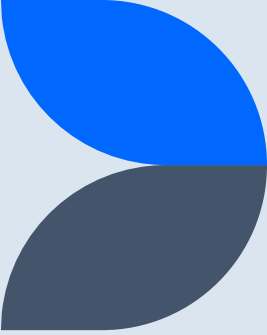
“

Indian Natural Rubber Sector should be prepared to influence the Supply Chain of Natural Rubber to sustain its growth trajectory in the Tyre /Non-Tyre Manufacturing.

”

IBRA

# 5 point plan



# Areas of focus

## **Improve Raw Material Quality**

Educate Growers

Develop Standards or Guidelines

Monitor Progress

## **Increase Production**

Collaborate with growers

Support with Inputs

Provide assured Market



# How we get there

## STANDARDS

Standardise the method of collection, storage and handling

## INCENTIVES

Supplement or Complement with Inputs

Provide assured market for the produce

## SUPPLY CHAIN

Create the infrastructure for Storage, Testing etc

Create the ecosystem for Free Trade

Make the Supply Chain Lean



# Summary

The demand for TSR (Block Rubber) is surpassing RSS. So it is high time the Policy makers take note of the situation and take steps in the direction to meet the changing consumption pattern and to prepare the Indian Natural Rubber Supply Chain to maintain its relevance in the future too.



# Thank you

*General Secretary*

IBRA

blockrubberassociation@gmail.com