



Global Technically Specified Rubber Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 17.9 bn
Forecast (2031)	USD 23.5 bn
CAGR (2021-2031)	4.6%
Study period	2021-2031
Largest region	Asia-Pacific · 70.2%
Fastest-growing region	Middle East & Africa · 6.1%
Market concentration	Moderate
Licence	Individual / Company

The global technically specified rubber market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Tire manufacturing accounted for XX% of demand, reflecting TSR's consistent impurity, ash, nitrogen, volatile-matter and plasticity specifications for high-throughput compounding. Asia-Pacific represented XX% of market value, anchored by China's tire industry and the integrated processing bases of Thailand, Indonesia, Vietnam and Malaysia. Traceable and verified deforestation-free rubber is becoming a distinct commercial tier as tire manufacturers restructure procurement ahead of the European Union Deforestation Regulation.

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Executive summary

The global technically specified rubber market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Tire manufacturing accounted for XX% of demand, reflecting TSR's consistent impurity, ash, nitrogen, volatile-matter and plasticity specifications for high-throughput compounding. Asia-Pacific represented XX% of market value, anchored by China's tire industry and the integrated processing bases of Thailand, Indonesia, Vietnam and Malaysia. Traceable and verified deforestation-free rubber is becoming a distinct commercial tier as tire manufacturers restructure procurement ahead of the European Union Deforestation Regulation.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion from XXX tonnes of technically specified rubber in 2025.
- Market value will reach USD XXX billion in 2031, while volume rises to XXX tonnes.
- TSR 20 represented XX% of 2025 market value because its property envelope aligns with high-volume tire tread and carcass compounds.
- Tire manufacturing consumed XX% of TSR value in 2025; automotive applications including tires accounted for XX%.
- Asia-Pacific held XX% of global demand, with China alone representing XX% of market value.
- ANRPC reported that global natural-rubber production reached XXX tonnes through the first months of the fourth quarter of 2024, XX% above the corresponding 2023 period.
- Malaysia produced XXX tonnes of natural rubber in December 2024; smallholders supplied XX% of that output, according to the Department of Statistics Malaysia.
- Sri Trang Agro-Industry sold XXX tonnes of natural rubber in 2025, demonstrating the scale achieved by the leading integrated processor.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Technically Specified Rubber Market Trends and Growth Drivers

Technically specified rubber sits between fragmented agricultural production and highly standardized tire manufacturing. Thousands of farmers and dealers supply cup lump into factories that must deliver repeatable dirt, ash, nitrogen, volatile-matter, plasticity and viscosity performance. The processor's commercial value therefore rests on raw-material access, laboratory control, working capital and consistent execution across seasonal supply cycles.

Demand is structurally tied to tires, especially truck, bus and off-highway products that depend heavily on natural rubber's fatigue and tear properties. Replacement demand provides resilience, while capacity growth in India and Asia supplies the strongest incremental pull. At the same time, aging plantations and climate disruption limit how quickly supply can respond to higher prices.

Traceability is reshaping competition. Farm geolocation, legality verification, satellite screening and batch-level chain of custody are moving from sustainability programs into core product specifications. This transition creates a premium segment for processors that can connect dense collection systems to auditable digital records without compromising delivery reliability.

Growth drivers

Tire Production Expands Core TSR Demand

Radial tires require natural rubber for fatigue resistance, tear strength and heat performance, particularly in truck, bus and off-highway applications. New tire plants and debottlenecking in India, China and Southeast Asia translate directly into TSR 10 and TSR 20 procurement, while replacement demand provides a more resilient base than original-equipment production.

Vehicle Parc Growth Supports Replacement Tires

The expanding installed base of passenger cars and commercial vehicles increases replacement cycles even when new-vehicle production slows. High-mileage fleets, road freight growth and harsher operating conditions in emerging markets favor natural-rubber-intensive commercial tires and strengthen recurring TSR demand.

Block Rubber Replaces Less Consistent Sheet Grades

Automated mixing lines value the reproducibility, compact bale format and laboratory certification of TSR. Processors are capturing demand previously served by visually graded sheet rubber by tightening dirt and plasticity controls and offering customer-specific viscosity ranges.

Indian Tire Capacity Creates Import Pull

India's natural-rubber consumption substantially exceeds domestic output, and tire makers require scalable supplies of consistent block rubber. Capacity investment in passenger, truck, bus and two-wheeler tires

increases import demand from Southeast Asia and West Africa and supports direct producer-to-manufacturer contracts.

Traceable Rubber Gains a Commercial Premium

European regulation and global tire-company sourcing policies are converting traceability into a procurement specification. Processors able to connect farm polygons, dealer transactions, factory batches and shipment records can access preferred programs, reduce customer compliance costs and defend higher realized prices.

West African Processing Diversifies Supply

Côte d'Ivoire's rapid production expansion has attracted modern crumb-rubber plants and international trading networks. The region gives buyers an alternative to concentrated Southeast Asian origins and supports shorter seasonal gaps when Asian tapping volumes decline.

Restraints

Raw-Material and Price Volatility

Processors buy cup lump from fragmented collection networks while selling against regional benchmark prices and customer formulas. Sudden changes in farm-gate competition, freight, exchange rates or tire demand compress processing margins and can leave factories operating below efficient utilization.

Aging Trees Constrain Yield Growth

A decade of weak planting economics reduced replanting in several established origins, leaving older trees and lower-yielding holdings in production. Because new rubber trees require several years before tapping, improved prices cannot generate an immediate supply response.

Climate and Disease Disrupt Tapping

Heavy rainfall reduces tapping days, while flooding, heat stress and leaf-fall diseases lower latex flow and complicate cup-lump collection. These disruptions raise quality variability, transport costs and the risk of seasonal factory underutilization.

Smallholder Traceability Raises Cost-to-Serve

TSR factories frequently source through multiple dealer layers and thousands of small farms lacking standardized land records. Polygon mapping, legality checks, segregation and transaction-level documentation require new field teams and systems, widening the cost gap between verified and conventional material.

Technically Specified Rubber Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Tire Production Expands Core TSR Demand	XXX	XXX	XXX
Vehicle Parc Growth Supports Replacement Tires	XXX	XXX	XXX
Block Rubber Replaces Less Consistent Sheet Grades	XXX	XXX	XXX
Indian Tire Capacity Creates Import Pull	XXX	XXX	XXX
Traceable Rubber Gains a Commercial Premium	XXX	XXX	XXX
West African Processing Diversifies Supply	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Raw-Material and Price Volatility	XXX	XXX	XXX
Aging Trees Constrain Yield Growth	XXX	XXX	XXX
Climate and Disease Disrupt Tapping	XXX	XXX	XXX
Smallholder Traceability Raises Cost-to-Serve	XXX	XXX	XXX

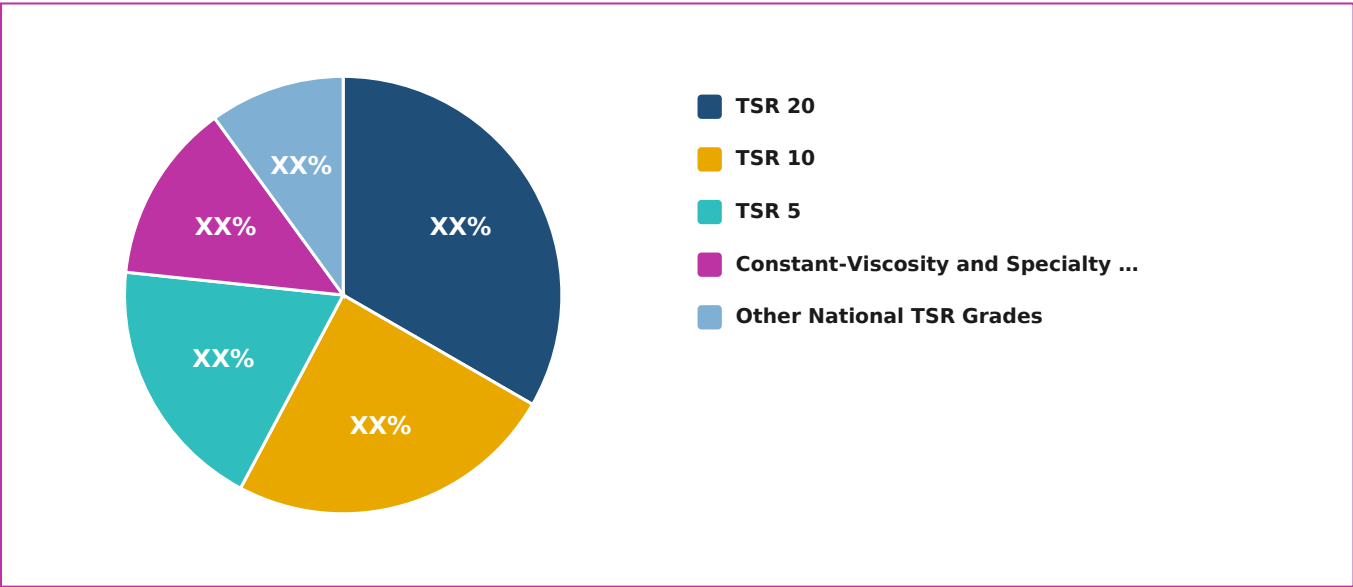
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Technically Specified Rubber Market Segmentation Analysis

By Grade

TSR 20 is the industry's workhorse because it converts cup lump and field coagulum into a consistent specification suited to high-volume tire compounds. TSR 10 serves applications requiring lower dirt limits, while TSR 5 addresses cleaner feedstock and tighter processing requirements. Constant-viscosity, low-viscosity and customer-specific grades grow fastest as automated mixing plants seek reduced batch variation and premium tire manufacturers tighten compound tolerances.

Value share by grade, 2025



Source: XXX

Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
TSR 20	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
TSR 10	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
TSR 5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Constant-Viscosity and Specialty TSR	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other National TSR Grades	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

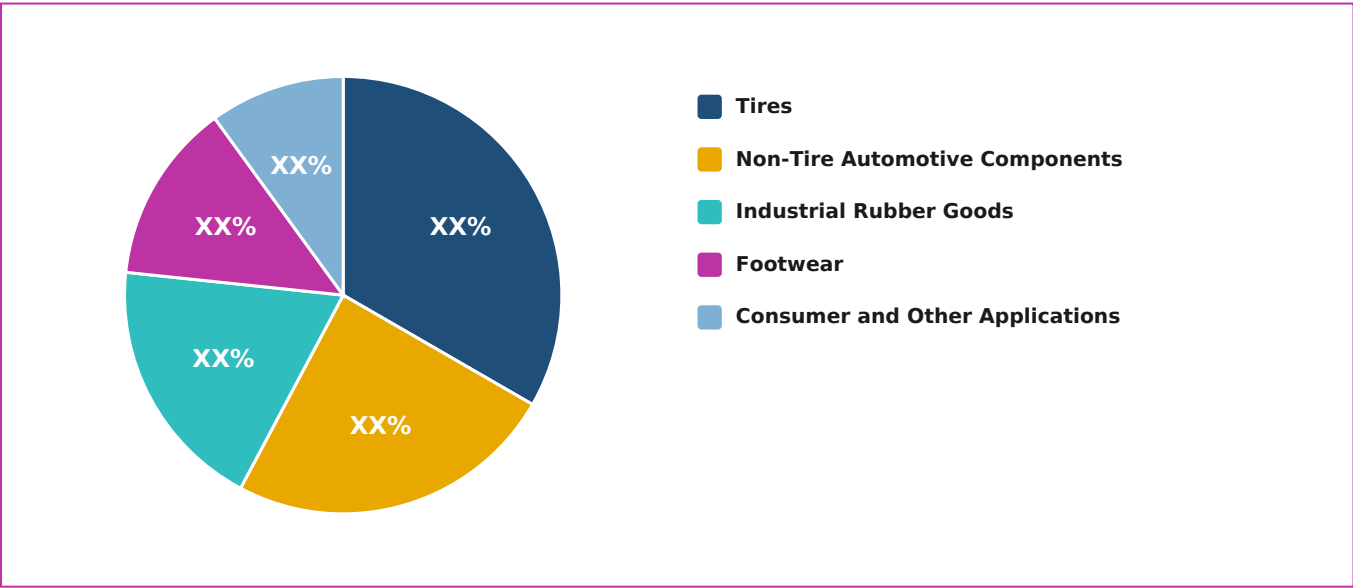
Source: XXX

By Application

Tire manufacturing dominates because natural rubber supplies resilience, fatigue resistance and strength that remain difficult to replace in demanding commercial and off-highway tires. Non-tire automotive

products use TSR in mounts, bushings, seals and vibration-control components. Industrial goods require grade-specific performance for belts, hoses and engineered products, while footwear and consumer applications remain more exposed to substitution and price-led formulation changes.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Tires	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Non-Tire Automotive Components	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Rubber Goods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Footwear	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Consumer and Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End-Use Industry

Automotive demand combines original-equipment tires, replacement tires and molded technical components, producing the market's largest and most specification-intensive customer group. Industrial manufacturing is the second-largest end use, led by material handling, mining, construction and fluid-transfer products. Healthcare demand is smaller because latex dominates many medical applications, but selected dry-rubber components sustain a specialized TSR requirement.

Value by end-Use Industry, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Automotive and Mobility	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and Manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Consumer Goods and Footwear	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Healthcare	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other End Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Supply Assurance

Conventional mass-market TSR remains dominant, particularly in Asian domestic trade and applications outside regulated supply chains. Verified traceable material is gaining share as buyers require farm coordinates, legality records, deforestation screening and batch linkage. Certified or independently assured supply commands the fastest growth but remains constrained by smallholder mapping, segregation economics and the availability of audited chain-of-custody systems.

Value by supply Assurance, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional TSR	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Verified Traceable or Certified TSR	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct contracts dominate qualified tire accounts because customers approve specific factories, grades and testing systems and frequently use formula-based pricing. Traders and distributors remain important for working-capital intermediation, multi-origin blending, prompt cargoes and smaller industrial buyers. Direct channels gain share as traceability requires tighter links between processor batches and downstream due-diligence records.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traders and Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

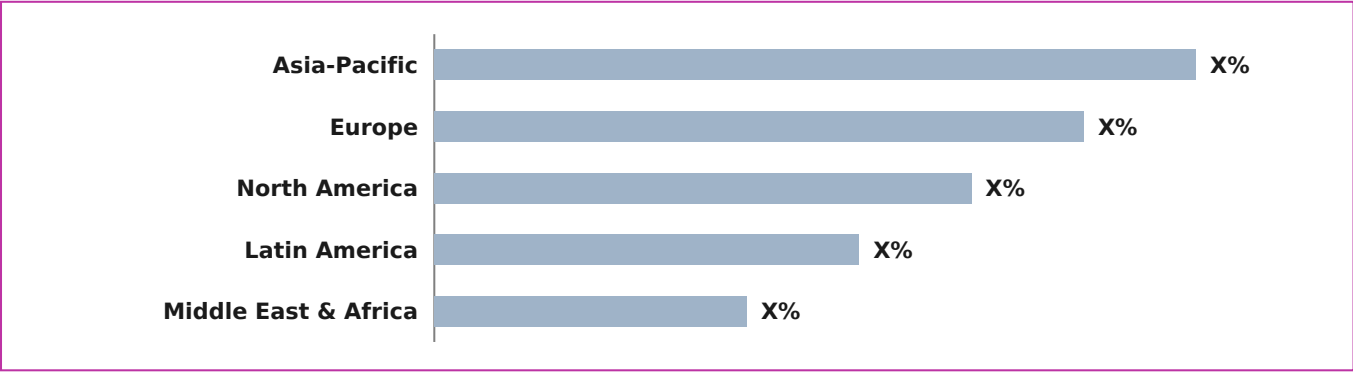
Technically Specified Rubber Market Regional Analysis and Country Outlook

Asia-Pacific accounted for XX% of 2025 demand and remains the center of both TSR processing and tire conversion. China generated XX% of global market value through its passenger, commercial and off-highway tire industries, while Thailand, Indonesia, Vietnam and Malaysia supplied the region's principal standardized block-rubber streams. Regional purchasing increasingly combines SICOM-linked pricing with factory qualification, contamination controls and farm-origin data.

India is the most consequential incremental demand market. Rubber Board data show that Indian natural-rubber consumption consistently exceeds domestic production, supporting imports for tire and industrial compounds. New tire capacity, road-freight growth and radialization lift consumption, while tariff treatment, port logistics and qualification of African origins determine the accessible supplier pool.

Middle East & Africa records the fastest regional CAGR at XX%. Côte d'Ivoire has become the leading diversification origin, producing XXX tonnes of natural rubber in 2024 and attracting larger crumb-rubber factories, including Olam Agri's acquisition of ASAF. Europe grows more slowly in physical volume but exerts outsized influence on market structure through EUDR compliance, verified sourcing and tire-company sustainability specifications.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East & Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Technically Specified Rubber Market Competitive Landscape and Company Share

The TSR processing market is moderately concentrated: the five largest groups held XX% of 2025 sales, while the remaining supply was distributed among national processors, plantation groups and merchant-owned factories. Sri Trang Agro-Industry leads through its Thai and Indonesian collection network and integrated processing footprint; Halcyon Agri, Von Bundit, Southland Rubber and Olam Agri form the next scale tier.

Competition is determined by access to cup lump, laboratory consistency, factory utilization, working-capital capacity and qualification with global tire manufacturers. Scale alone is insufficient: tire customers approve individual factories and grades, making contamination control, plasticity retention, viscosity consistency, delivery reliability and claims performance central to account retention.

Strategic activity is moving toward African capacity, digital traceability and vertical control of procurement. Olam Agri's August 2026 acquisition of ASAF added XXX tonnes of annual processing capacity in Côte d'Ivoire, lifting its national capacity to XXX tonnes. Leading processors are also registering farmers, mapping plots, linking batches to origin and developing segregated EUDR-ready supply rather than competing solely on benchmark-linked price.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Sri Trang Agro-Industry Public Company Limited	XXX	XXX	XXX	XXX
Halcyon Agri Corporation Limited	XXX	XXX	XXX	XXX
Von Bundit Co., Ltd.	XXX	XXX	XXX	XXX
Southland Rubber Group	XXX	XXX	XXX	XXX
Thai Hua Rubber Public Company Limited	XXX	XXX	XXX	XXX
Hainan Rubber Industry Group Co., Ltd.	XXX	XXX	XXX	XXX
Vietnam Rubber Group	XXX	XXX	XXX	XXX
Olam Agri	XXX	XXX	XXX	XXX
Société Internationale de Plantations d'Hévéas	XXX	XXX	XXX	XXX
Socfin Group	XXX	XXX	XXX	XXX

Source: XXX

Technically Specified Rubber Market Forecast and Investment Opportunities

Global TSR volume will increase from XXX tonnes in 2025 to XXX tonnes in 2031. Market value rises faster than volume as supply tightness, higher processing standards and the mix shift toward verified and constant-viscosity grades lift average realization. Tire demand remains the principal growth engine, with India, China and ASEAN accounting for most incremental consumption.

The base case assumes steady replacement-tire demand, measured global vehicle-production growth and continued natural-rubber supply constraints. An accelerated case emerges if Indian tire capacity ramps faster and traceable supply commands durable premiums; a downside case centers on prolonged automotive weakness, tariff-driven trade disruption and accelerated substitution where synthetic rubber can meet performance requirements.

Winning processors will combine dense origin networks with documented legality, polygon-level traceability, segregated logistics and energy-efficient factories. Buyers will favor multi-origin suppliers capable of balancing Southeast Asian and West African seasons, while standalone processors without raw-material security or compliance infrastructure face consolidation pressure.

Opportunities

- EUDR-ready segregated TSR with plot-level geolocation
- Constant-viscosity and low-contamination grades for automated tire plants
- New crumb-rubber capacity in Côte d'Ivoire, Liberia and Ghana
- Digital farmer registration and batch-level chain-of-custody platforms
- Long-term offtake structures linked to replanting and yield improvement
- Lower-carbon drying, wastewater recovery and biomass-powered processing

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