

# Joint Position on the Global Rubber Statistics

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We expressly welcome the dashboard presented by the European Commission. With all its visualisation and data extraction features, it appears to be an excellent research tool.

Statistical data, particularly on natural rubber, form an indispensable basis for analysing and safeguarding our companies' current and future supply of this critical and strategic non-European raw material. The timeliness, completeness and reliability of the data are of utmost importance. Thus, the quality of the data determines the usability and value of the dashboard which could become a decisive tool to strengthen strategic decision-making across the European sector.

Now that we have access to the Rubber dashboard, we were able to compare our requirements with the available data and evaluate them as follows.

## Timeliness of statistical data

We are seeing shifts in regional production, both within Asia and between continents (Africa, South America). At the same time, growth trends differ significantly with declines in Asia and increases in Africa and South America.

It is extremely important for our companies to be aware of these regional trends in a timely manner in order to assess

- the qualities and quantities of the natural rubber types and
- compliance with EU Deforestations Regulation (EUDR).

Real time quarterly data would be ideal; while a maximum time lag of three months would still be acceptable.

The Rubber dashboard currently only contains historical annual data up to 2024.

## Completeness of data

Due to market dynamics, it is necessary to collect comprehensive, continuous and comparable data from all producing countries. For natural rubber, data is required on:

- Cultivated areas (productive areas, new planting and replanting) (*partially included*)
- Tree age (a rubber tree becomes productive after 7 years and remains so for approximately 20 years) (*not included*)
- Production (*included*)
- Exports (*included*)
- Imports (*included*)
- Stocks (*not included*)
- Consumption (*not included*)

The dashboard certainly presents the historical rubber industry to anyone who is interested in a reference document such as academics and NGOs (for example). However, market players in the rubber sector need more data to carry out a business analysis.

Mixed (or Compound) Rubber does not feature in the Dashboard. In China, for example, very large quantities of blends (a mixture of natural and synthetic rubber) are imported and processed.

Latex does not seem to be defined and this is of major importance to the non-tyre sectors of the industry.

The Dashboard makes no reference to Synthetic Rubber nor the Tyre Industry data which ultimately drives the rubber industry.

### Reliability of data

To ensure the reliability of statistical data, systematic consistency checks and ongoing plausibility checks are required. With regard to the latter, we believe it would be beneficial to establish a permanent panel of experts that meets regularly to compare the statistical output with market knowledge.

The 3rd Party data sources in the Dashboard (FAO and World Bank for example) use historical data released by IRSG. If IRSG folds in the future where will the new data come from?

### Interpretability of rubber articles production data

The last version of the dashboard includes data on the production of rubber articles, sourced from Eurostat. However, the figures currently displayed appear either imprecise, incomplete or based on a methodology that is not sufficiently or clearly explained, as some results are inconsistent with the relative size of national industries when assessed against other indicators such as number of companies, turnover, and import/export volumes.

It is therefore essential that the data sources, aggregation criteria and any adjustments applied be clearly disclosed, so that users can correctly interpret the figures and assess their reliability.

### Accuracy and confidentiality of synthetic rubber data

The dashboard currently does not provide data on synthetic rubber production. This is a particularly sensitive issue in countries where the concentration of producers is such that publishing disaggregated data would risk disclosing commercially sensitive company information.

To address this, two approaches should be considered: either aggregating data at a broader geographical level, or making the data available exclusively in a restricted and confidential format. In either case, the availability of synthetic rubber production data is essential: without it, it will not be possible to calculate total rubber consumption — natural and synthetic combined — through the standard indirect method.

### Forecast of the supply situation

To date, the World Rubber Industry Outlook has been published by the IRSG on the basis of the collected statistical data. Traditionally this ten-year forecast has provided our companies with a key basis for planning. It would be highly desirable to continue to receive a forecast (forecasting model) based on the statistically recorded data. There is a clear opportunity to enhance the existing framework by bringing together historical data and forward-looking insights within a single tool. The dashboard should evolve to serve this purpose, integrating not only current data but also forecasting elements, while ensuring continuity and reinforcing the overall value of market intelligence in the absence of the IRSG.

The current rubber dashboard does not provide European market participants with the necessary market data. In its current form, the dashboard does not in any way bridge the gap posed by a potential future without the IRSG.

Great disappointment and a failure to make use of the dashboard are the predictable reactions from companies in the European rubber industry.

### *A Joint Statement of the undersigned associations*



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