EU-NIGERIA
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MARKET INTELLIGENCE BRIEF

NATURAL RUBBER

HS 400110 / 400122 / 400129 | EUNAC 2026

Global Gateway

Funded by the European Union

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AGRIBUSINESS REGISTER LIMITED

EU Market: USD 2.76 Billion	Nigeria Target: USD 134.1 Million (5%)

EU MARKET SNAPSHOT & NIGERIA'S STRATEGIC POSITION

The EU automotive sector — the world's largest consumer of high-performance tyres — is wholly dependent on imported natural rubber. No synthetic substitute can replicate natural rubber's heat resistance, rolling resistance, and durability in truck, aircraft, and high-performance passenger tyres. Crucially, EV tyre requirements (enhanced load-bearing for battery weight, improved rolling resistance for range) are increasing natural rubber demand in key segments. EU imports total USD 2.76 billion annually. Nigeria holds ~2.5% of the EU market share — a fraction of Côte d'Ivoire's 23%, achieved under EPA zero-tariff access and sustained investment. .

The gap is not structural: Nigeria has more rubber hectares than Côte d'Ivoire. The gap is policy (EPA), quality (aging plantation stock), and certification (GPSNR/FSC). All three are addressable.

PARAMETER	MARKET INTELLIGENCE
EU Import Value (2024)	USD 2.76 billion (all grades: latex, TSNR, sheets)
Top EU Suppliers	Indonesia 28% | Côte d'Ivoire 23% | Thailand 18% | Malaysia 12% | Vietnam 8%
Key EU Demand Driver	Automotive tyres — Continental, Michelin, Pirelli, Bridgestone, Goodyear; industrial rubber
Nigeria Current EU Export	~USD 70.9 million | ~2.5% EU market share — well below productive potential
Nigeria Target (5%)	USD 134.1 million | Côte d'Ivoire benchmark: 23% under EPA — Nigeria's achievable path
Nigeria's Rubber Belt	200,000+ hectares | Edo, Delta, Cross River, Rivers states | 100,000–150,000 smallholders
EPA Tariff Impact	3% MFN = USD 60–144/tonne penalty vs Côte d'Ivoire under EPA. EPA ratification equalises.
EUDR Compliance Deadline	Large operators: 30 Dec 2026 | SMEs: 30 Jun 2027 — farm-plot geolocation required
Sustainability Requirement	GPSNR certification — Continental targets 100% responsible sourcing by 2030; Michelin, Pirelli aligned
Primary Constraint	Ageing plantation stock (1960s–70s vintage) — yields at 600–800 kg/ha vs. 1,200–1,800 kg/ha potential

NIGERIA'S RUBBER SECTOR - SCALE, STRENGTHS & THE YIELD GAP

Nigeria's rubber industry has the geographic and productive foundation to rival Côte d'Ivoire's 23% EU market share — but a critical structural constraint stands in the way: most of the country's 200,000+ hectares was planted in the 1960s and 1970s. Rubber trees over 35 years old decline sharply in latex yield and quality. Today, Nigerian plantations yield an estimated 600–800 kg/hectare of dry rubber equivalent — barely 40–60% of the 1,200–1,800 kg/ha achievable with modern RRIM 600 and GT1 clonal material developed by the Rubber Research Institute of Nigeria (RRIN). Systematic replanting of 80,000–120,000 hectares is the single most commercially transformative intervention available. Beyond yield, Nigeria currently exports primarily TSNR to Germany — Europe's largest automotive hub — as well as to China, Turkey, and Brazil. Quality, certification, and EPA tariff parity are the remaining barriers between Nigeria and a doubling of its EU market presence.

THE CÔTE D'IVOIRE BENCHMARK	*Côte d'Ivoire achieves 23% EU rubber market share — a 9× multiple of Nigeria's ~2.5% — primarily because of its EU EPA zero-tariff advantage and systematic investment in TSNR quality certification. Nigeria's MFN tariff of 3% creates a USD 60–144/tonne cost penalty at current prices. EPA ratification immediately closes this gap. With equivalent tariff access and the plantation rehabilitation programme in place, Nigeria is structurally capable of reaching and exceeding Côte d'Ivoire's EU position within a decade.*

EXPORT CONSTRAINTS

- Plantation Age & Yield Gap: 40–60-year-old stock at 40–60% yield potential. Replanting 80,000–120,000 ha with RRIM 600 / GT1 / PB260 clones is the enabling condition for the 5% EU share target.
- TSNR Quality: EU tyre manufacturers require ISO 2000/ASTM D2227 compliance for dirt content, nitrogen, volatile matter, ash, and Plasticity Retention Index (PRI). Investment in modern TSNR processing facilities is required.
- GPSNR / FSC Certification Gap: Continental (100% target by 2030), Michelin, and Pirelli require GPSNR-aligned sustainability sourcing. Nigeria's low deforestation risk makes FSC certification achievable but requires investment in management systems and auditor fees.
- EPA Tariff Disadvantage: 3% MFN tariff = USD 60–144/tonne cost penalty vs Côte d'Ivoire. EPA ratification eliminates this structural disadvantage.
- Evacuation Infrastructure: Access roads from rubber estates to processing plants and Apapa/Onne ports need upgrading to reduce post-harvest latex contamination losses.

EU BUYER LANDCAPE - TYPE MANUFACTURERS & TRADERS

EU BUYER / INSTITUTION	STRATEGIC OPPORTUNITY
Continental AG (Germany)	World's 4th largest tyre maker | GPSNR 100% target 2030 | Hanover desk sources West African rubber directly | Priority EUNAC B2B target
Michelin (France)	World's 2nd largest tyre co. | RubberWay app active in Nigeria | SIPH subsidiary has 60,000+ ha across West Africa incl. Nigeria | FSC/GPSNR aligned
Pirelli (Italy)	Premium tyre manufacturer | 73% of rubber from GPSNR-member suppliers (2022) | Target for high-grade Nigerian TSNR in premium auto tyre applications
Hankook Tyre (EU plants: HU/CZ)	Korean maker with EU production | Active buyer of West African rubber for EU market | Growing GPSNR participation
Kraton Corporation (Netherlands)	Specialty rubber & polymer company | Uses natural rubber derivatives | Target for high-value RSS and TSNR
Sinochem / GMG / Socfin (traders)	Major rubber trading companies with West Africa operations | Logistics and origination partners for Nigerian rubber to EU tyre manufacturers

STRATEGY TO REACH 5% EU MARKET SHARE

- **Plantation Rehabilitation (Core Investment):** USD 60 million blended finance facility — targeting BII, AFD, DEG as European DFI co-investors — to replant 80,000–120,000 ha with RRIM 600 and GT1 clones. Continental AG and Michelin's sustainable rubber procurement teams should be engaged as European anchor partners and potential co-investors.
- **TSNR Quality Infrastructure:** USD 8–12 million investment in modern TSNR processing plants with ISO-compliant QC laboratories in Edo and Delta states. Partner with RRIN for technical standards; SGS or Bureau Veritas for independent certification.
- **GPSNR Membership & FSC Certification:** Initiate formal Nigerian rubber GPSNR membership and FSC certification for commercial estates. Target Continental AG and Michelin's sustainable rubber programmes as commercial offtake anchors for certified product.
- **EPA Ratification:** FMITI to designate EPA finalisation as a 2026–2027 priority. For rubber, the commercial impact is immediate: EPA eliminates the USD 60–144/tonne tariff disadvantage and places Nigeria on equal footing with Côte d'Ivoire in every EU tender process.

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What Is EUNAC

ENGAGE WITH NIGERIA AT EUNAC 2026
LAGOS, 25 JUNE 2026

B2B Matchmaking | Investment Wall | Commodity Showcase | Policy Dialogue | Deal Signing

EU–Nigeria Agribusiness Connect 2026 (EUNAC 2026) is a EU–Nigeria agribusiness trade and investment platform designed to connect Nigerian and European businesses, investors, exporters, and technology providers through B2B matchmaking, partnerships, and market access opportunities. The event promotes two-way trade by supporting Nigerian exports to the EU while creating opportunities for European agribusiness products, technology, and services in Nigeria.

EUNAC will be an annual event from the first edition in 2026.

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