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The Rubber Letter

Hydrogen, EUDR at 62 days, synthetic rubber sharply up: which elastomer for which temperature before winter.



FROM THE EDITOR

With 62 days to the application of the EUDR to large and medium-sized companies, the question is no longer whether to prepare, but how.

This issue follows two signals that weigh on seals: the rise of hydrogen electrolysis in Europe, which raises the bar for elastomers, and a synthetic rubber market that has become much more expensive over the past year. It also offers a selection grid for low-temperature use as winter approaches.

KEY FIGURES

1.1 GW

Electrolysis capacity selected in the 3rd European Hydrogen Bank auction (9 projects, €1.09 bn)

62 days

Between today and the application of the EUDR (30.12.2026) for large companies

+47.7%

Rise in the price of synthetic rubber over one year (CNY 16,700/t on 28 October)

Industry news

REGULATION

EUDR: the product scope is frozen for 2026

The deforestation regulation applies to natural rubber from 30 December 2026 for large and medium-sized companies. The seven raw materials covered do not change. Derived products have however been adjusted by the delegated act of 13 July: some leave the scope, and additions will only take effect from 30 December 2027. For a seal distributor, the priority remains

PFAS

PFAS restriction: final SEAC opinion expected by year-end

The consultation on the draft opinion of the socio-economic committee (SEAC) closed on 25 May. Contributions are being reviewed before the final opinion is adopted, which will conclude ECHA's scientific evaluation. The decision will then rest with the European Commission, with a derogation regime for uses without alternatives. The list of fluoropolymers concerned (FKM, FFKM, PTFE) is not yet fixed in its final form.

collecting geolocation data from natural rubber suppliers.

PRICES

Natural rubber: a market that is stabilising

In Shanghai, the benchmark contract moved between CNY 19,200 and 19,300/t at the end of October (CNY 19,325/t on 23 October, CNY 19,225/t on 28 October). After the strong spring rebound, rising stocks slowed the move. One market bulletin reports a 1.9% fall over the week to 15 October. The dry season remains the main risk factor for supply in Southeast Asia.

SYNTHETICS

Synthetic rubber: +47.7% over one year

Synthetic rubber reached CNY 16,700/t on 28 October, up 5.4% over the month. Butadiene, a key raw material, has risen over recent months in Europe and North-East Asia. For EPDM, NBR or HNBR, the cost therefore remains closely tied to energy and petrochemical prices.

Trends & outlook

01

Electrolysis: demand rises

The selected projects represent more than 1 GW of electrolysis. Each stack uses hundreds of seals, making this a volume market, not just a specialty one.

02

Supplier documentation

Due-diligence statements, composition sheets and REACH compliance are becoming purchasing criteria in their own right, on a par with price and lead times.

03

Indexed contracts

With natural rubber stable and synthetics volatile, raw-material indexation clauses are returning to annual negotiations.

04

Year-end stocks

Buyers are securing critical references before year-end, especially those whose supplier must provide full traceability.

TECHNICAL TIP OF THE MONTH

Low temperatures: choose the elastomer before winter

Below a few degrees, an elastomer stiffens and loses its elasticity. The seal no longer holds compression and the risk of leakage at start-up increases. The right choice depends on the actual service range, not on the workshop's ambient temperature.

01

Establish the real minimum temperature

Including during cold shutdowns and start-ups. Indicative references, to be checked against the compound datasheet: silicone (VMQ) ≈ −55 °C, EPDM ≈ −40 °C, NBR ≈ −30 °C, FKM ≈ −20 °C.

02

Compare the range with the compound datasheets

Not with the elastomer name alone: grade, fillers and plasticisers significantly change the lower limit.

03

Test under the coldest start-up conditions

Before series production, on the actual seal and its service fluid.

DID YOU KNOW?

An EPDM seal stored near petroleum products, solvents or oils can swell or degrade before it is even fitted. Storing it away from these products is part of seal quality.

SOURCES — EUROPEAN COMMISSION (DG ENVIRONMENT, EUDR DELEGATED ACT OF 13 JULY 2026), ECHA (PFAS RESTRICTION, RAC AND SEAC COMMITTEE TIMETABLE), EUROPEAN HYDROGEN BANK (RESULTS OF THE 3RD AUCTION, MAY 2026), TRADING ECONOMICS AND SHFE (NATURAL AND SYNTHETIC RUBBER PRICES, 28 OCTOBER 2026), RUBBER MARKET BULLETINS (OCTOBER 2026), ELECTROLYSER AND SEAL MANUFACTURER DATASHEETS.

Information provided for guidance only; it does not constitute legal or regulatory advice.