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How to act in the "14th Five-Year Plan" of the tire industry in Shandong Province

Time: 2022-02-07 Source: China Auto News Comment

Carbon Black Industry Network According to China Automobile News, recently, the Department of Industry and Information Technology of Shandong Province issued the "14th Five-Year Plan for the Development of the Chemical Industry in Shandong Province" (hereinafter referred to as the "Plan"), which was formulated for the development of the tire manufacturing industry in Shandong Province. detailed planning. Over the years, as the largest tire production province in China, the development of the tire industry in Shandong Province has been hotly discussed by the industry. The directional provisions of the "Plan" on the development of the "14th Five-Year Plan" of the tire industry in Shandong Province have also attracted the attention of the industry.

The layout of the output value target of 200 billion yuan is further optimized

In 2020, enterprises above designated size in Shandong Province will produce 385 million rubber tire casings and 323 million radial tire casings annually, accounting for 47% and 53.8% of the national output respectively, ranking first in the country. At the same time, among the 9 tire companies listed on the A-share market, 5 are from Shandong, namely Linglong Tire, Sailun Tire, Triangle Tire, Sentury and Qingdao Double Star.

Zhang Hongmin, president of the Shandong Rubber Industry Association, said in an interview with a reporter from China Automobile News that the advantage of the tire industry in Shandong Province lies in the fact that the efficiency, scale and development momentum of key enterprises are in a leading position in the country.

The "Plan" proposes that by 2025, the output value of the tire industry will reach 200 billion yuan; the number of tire companies with sales revenue exceeding 10 billion yuan will reach

h 8. Among them, there are more than two companies with more than 20 billion yuan, and one or two companies have entered the top 10 in the global tire industry.

Zhang Hongmin expressed that these goals are hopeful to be achieved. He revealed that the Shandong Provincial Rubber Industry Association participated in the formulation of the tire industry plan in the "Planning". Therefore, Zhang Hongmin is optimistic about the completion of the "14th Five-Year" development goal of Shandong's tire industry in the "Plan": "During the '14th Five-Year Plan' period, Shandong's leading tire companies such as Linglong Tire and Sailun Tire will rank higher in the international arena. Great improvement. At present, Linglong Tire ranks 14th in the world's tire industry. The number of enterprises will be greatly reduced, the scale of key enterprises will be further expanded, and the degree of industrial concentration will be further improved."

The reporter learned that Linglong Tire's 2020 operating income will be 18.383 billion yuan, and Sailun Tire's 2020 operating income will be 15.405 billion yuan. Therefore, there will be more than two companies with an annual operating income of more than 20 billion yuan mentioned in the "Planning". It is not difficult to achieve.

In September 2021, a higher-level "Shandong Province's "14th Five-Year Plan" Manufacturing Powerful Province Construction Plan" (hereinafter referred to as the "Strong Province Plan") was issued, and the overall layout of the tire-related industrial chain in Shandong Province was carried out. According to the "Strong Province Planning", Yantai City, Qingdao City, Weihai City, Dongying City, and Jining City actively explore high-end product markets, vigorously develop wide-section, flat, low-rolling resistance, low-noise high-end tire products, and develop new environmental protection and energy-saving tires. Tire retreading technology realizes the industrialization and greenization of waste tire recycling. Qingdao City and Weifang City have increased the research and development of tire manufacturing equipment such as rubber refining, molding, vulcanization, molds, and testing, and vigorously developed tire intelligent manufacturing equipment. Weifang City and Weihai City have developed tire frame materials such as new structural steel cords and high-modulus, low-shrinkage polyester cord fabrics to promote the development of lightweight tires. Zibo City, Yantai City, Binzhou City, and Qingdao City will speed up the industrialization process of new rubber varieties such as solution-polymerized styrene-butadiene rubber, isoprene rubber, rare earth butadiene rubber, halogenated butyl rubber, and new chemical mixing materials, and improve high-quality synthetic rubber quality. Liaocheng City, Heze City, and Dezhou City will accelerate the development and promotion of accelerators, anti-aging agents, anti-scorch agents, carbon black and other new environmental protection additives, and promote the high-end and green development of the rubber additives industry.

Cities in Shandong Province have a clear division of labor and orderly regional coordination, intending to build a relatively complete tire industry system, which is of great benefit to t

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the realization of the tire industry goals in the "Plan".

Clear out backward production capacity and create an internationally competitive brand

Zhang Hongmin pointed out: "The problem of the tire industry in Shandong Province is that it is severely polarized. There are too many small-scale tire companies, and outdated production capacity needs to be eliminated in time. In addition, the overall product brand awareness and level are not high, and most companies are homogenized and competitive."

The "Plan" proposes to strictly implement industrial policies and industry standards, integrate and withdraw all-steel radial tires with an annual production capacity of less than 1.2 million (except for engineering tires, aviation tires, and wide-section tubeless tubes), and semi-steel radial tires with an annual production capacity of less than 5 million (Except for high-end products of racing tires and ultra-low profile tires) enterprises that exit production capacity can carry out reduction replacement. Eliminate rubber mixing machines that cannot realize closed automatic feeding, and vulcanization equipment in the radial tire industry that cannot realize nitrogen filling process.

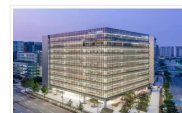
Exiting outdated production capacity has been the key task of the tire industry in Shandong Province for many years. During the "13th Five-Year Plan" period, the tire industry in Shandong Province eliminated low-end rubber mixing and vulcanization equipment, and reduced the production capacity of low-end bias tires by 22 million. According to statistics from the Shandong Provincial Chemical Special Action Office, in 2020, 65 companies in Shandong Province will withdraw from the production capacity of 17.32 million bias tires.

In April 2021, the "Provincial Implementation of the "Three Resolute" Action Plan (2021-2022)" issued by Shandong Province has almost the same expression as the "Plan", and set its withdrawal time as 2022. The document involves a total of 18 companies, including 8 all-steel tire companies with a total annual production capacity of 5.56 million pieces; 10 semi-steel tire companies with a total annual production capacity of 25.61 million pieces.

The replacement of production capacity reduction also provides new opportunities for Shandong tire companies to promote technology upgrades and enter high-end markets such as aviation tires. Among them, Sentury has signed a relevant cooperative research and development agreement with COMAC to cooperate in the research and development of domestic large aircraft aviation tires, and became a qualified supplier of COMAC ARJ21-700 aviation tires in 2019. The company's IPO raised funds to invest in the "annual production of 80,000 aviation tires (including 50,000 retreaded tires) project" is advancing in an orderly manner.

In addition, the "double carbon" goal forces all industrial restructuring and high-quality development, and the tire industry is no exception. To this end, the "Plan" proposes to actively promote green tire production processes such as chemical rubber refining and radiation pre-

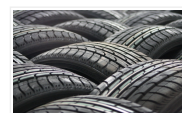
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vulcanization technology, encourage the secondary use of tires, promote green cracking of waste tires and carbon black regeneration technologies, and promote the green and circular development of the industry.

In terms of improving product power and brand power, the "Plan" proposes to develop high-end products such as ultra-low section, flattened, low rolling resistance, and low noise based on high-end and segmented markets, and increase smart tires, safety tires, and low-cost tires. R&D and production of rolling resistance tires, super wear-resistant and other high-performance radial tires, aviation tires, giant all-steel engineering tires, and high-performance motorcycle radial tires, increase product added value and market share, and establish a high-end, green tire series standard system, focus on increasing variety, improving quality, creating brand, and creating an internationally competitive tire brand.

International trade friction restricts the development of tire industry

Zhang Hongmin believes that the uncertainty of the international competitive environment and trade friction will become the main factors restricting the realization of the "plan" for the tire industry in Shandong Province. Zhang Hongmin pointed out that in the first half of 2021, due to the repeated epidemics at home and abroad, the continued high volatility of bulk raw material prices, the continued sharp rise in foreign trade sea freight, and the tight international shipping capacity, the tire industry has been severely challenged.

In addition, the risk of international trade frictions cannot be ignored. In recent years, countries and regions such as the United States, Brazil, India, and the European Union have launched anti-dumping investigations or raised access thresholds on China's tire export products, restricting China's tire exports. Since April 2018, Sino-US trade frictions have continued to escalate, and Chinese tire companies are facing higher tariffs on products exported to the United States, which has restricted Chinese tire companies' export business to the United States to a certain extent. "These all limit the further development of the tire industry in Shandong Province to a certain extent." Zhang Hongmin said.

Linglong Tire stated in its 2021 semi-annual report that in recent years, trade protectionism in major Western countries has risen. Countries and regions such as the United States, Brazil, India, and the European Union have launched anti-dumping investigations or raised entry thresholds on Chinese tire exports, restricting Chinese tire exports. Therefore, Chinese tire companies have gone abroad to avoid trade barriers.

With the anti-dumping and anti-subsidy investigations launched by the United States against South Korea, Thailand, Vietnam and other countries and regions in 2020, the wave of globalization is facing a "countercurrent". Coupled with the continuous recurrence of the epidemic, it is difficult to smooth the global industrial chain and supply chain, and the momentum of anti-globalization has intensified.

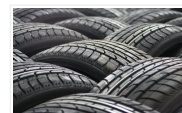
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For this reason, Linglong Tire will adjust its "6+6" strategy to a "7+5" strategy (7 producti on bases in China + 5 production bases overseas) in 2021. "Spring River Plumbing Duck Prop het." The strategic adjustment of leading enterprises has aroused the attention of the tire ind ustry in Shandong Province and even the whole country to the unstable factors at the interna tional level.

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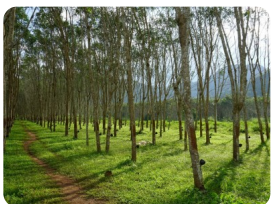
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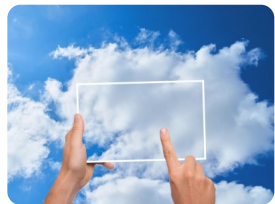
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