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# The "14th Five-Year Plan" of the rubber industry was released, creating a new era of glory

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On November 25, at the 21st National Rubber Industry Information Conference, the China Rubber Industry Association officially released the "Guidelines for the "14th Five-Year Plan" Development Plan of the Rubber Industry" (hereinafter referred to as the "Plan").

The "Plan" covers 14 industries in the rubber industry chain, and provides guidance for the development of the "14th Five-Year Plan" to seize opportunities and meet challenges.

According to Zhu Hong, deputy secretary-general of China Rubber Association and director of the Technical and Economic Committee, during the "Tenth Five-Year Plan" period, China's rubber products have made great strides to the world.

During the "Eleventh Five-Year Plan" period, my country's rubber industry completed its sprint towards becoming a major rubber country and became the largest rubber manufacturing country in the world, with the output of major products ranking among the top in the world. The product structure has been continuously optimized, and the transformation of the growth mode has achieved initial results, laying a good foundation for the development of the rubber industry during the "Twelfth Five-Year Plan". From the "Tenth Five-Year Plan" to the "Eleventh Five-Year Plan", it is the 10 years with the fastest growth of China's rubber industry. Compared with the end of the "Tenth Five-Year Plan", the growth of the rubber industry in the "Eleventh Five-Year Plan" has more than doubled by 1.5 times. In 2010 and 2005, the total industrial output value increased by 178%, with an average annual growth rate of 36%.

During the "Twelfth Five-Year Plan" period, the growth rate slowed down, and the development of the industry entered an important period of transition from the old model to the new model. The output of rubber products continues to grow, and the specifications and varieties are more abundant; the scale of enterprises has increased significantly, and the industrial concentration has increased; the technological innovation capabilities of enterprises have improved, and the adjustment of product structure has been promoted. The proportion of energy-saving, environmental protection, safety, and high-tech products has increased significantly. increase; the integration of industry intelligence and informatization is accelerating, intelligent manufacturing has started, and comprehensive strength has improved, laying a solid foundation for the transformation into a world rubber industry power.

During the "Thirteenth Five-Year Plan" period, the pursuit and promotion of high-quality development has become the theme. The rubber industry closely follows the new connotation of important strategic opportunities, accelerates the optimization and upgrading of economic structure, improves technological innovation capabilities, and turns pressure into a driving force for high-quality economic development. Intelligent manufacturing characterized by digitalization, networking, and intelligence has become a new force, and green development and environmental protection have become the consensus of the industry.

The guiding ideology of the "Plan" is to follow the guidance of Xi Jinping Thought on Socialism with Chinese Characteristics for a New Era, fully implement the spirit of the Party's "Nineteenth National Congress" and the Second, Third, Fourth, and Fifth Plenary Sessions of the Nineteenth Central Committee, and adhere to the "innovation", coordination, green, openness, and sharing" new development concept and the general tone of the work of seeking progress while maintaining stability, with the theme of promoting high-quality development, deepening supply-side structural reform as the main line, reform and innovation as the fundamental driving force, and building a domestic Taking the opportunity of a new development pattern in which the big cycle is the main body and the domestic and international dual cycles promote each other, we

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will implement innovation strategies, green sustainable development strategies, digital and intelligent transformation development strategies, and build a group of internationally competitive enterprise groups and industrial clusters. Create a group of well-known brands with international influence, and promote China's progress from a big rubber country to a rubber power.

The development goal of the "Plan" is to realize the transformation of the rubber industry through structural adjustment, scientific and technological innovation, and green development, adopting digitization, intelligence, platformization, and greenization, and promote quality change, efficiency change, and power change to achieve higher quality and more Efficiency, fairer, more sustainable and safer development. Focus on improving product quality, automation level, informatization level, production efficiency, energy saving, environmental protection, industrial concentration, enterprise competitiveness and economic benefits, and accelerate the pace of building a powerful country in the rubber industry. The total amount of the rubber industry must maintain a steady growth, but the average annual growth rate is slightly lower than the current level, and continue to stabilize the international leading scale influence and export share of China's rubber industry. Strive to enter the intermediate stage of a powerful country in the rubber industry by the end of the "14th Five-Year Plan" (2025).



“十四五”主要产品产量预测和规划目标

行业	“十四五”产量预测目标	规划目标
轮胎	70400万条，子午化率96%，其中：乘用车轮胎52700万条，载重子午轮胎14800万条，农业轮胎2900万条，巨型工程子午轮胎2万条，子午化率达到100%；农业胎1200万条，子午化率16%；航空胎5.4万条，扁平化率15%；航空子午胎实现产业化。	随着汽车行业增速放缓，全球轮胎行业也处于饱和状态，轮胎子午化率达到96%，全钢胎内胎率70%，扁平化乘用车子午胎胎面扁平率30%（以55-45系列为例），农业胎子午化率由目前2.5%提升至15%左右，巨型工程胎发展迅速，年产量约为2万条，子午化率100%。绿色轮胎的市场化率将升至70%以上，达到世界一流水平。
力车胎	摩托车外胎12070万条摩托车内胎21110万条自行车外胎42000万条自行车内胎55000万条电动车外胎36300万条电动车内胎7700万条	摩托车胎子午化实现产业化，超等自行车胎合模率（26×1.95外胎总重不超过260克）达到98.50%，子午线摩托车胎合模率98%，开发超等自行车胎、电动自行车胎、行业自行车胎和电动自行车胎轻量化产品比例提高到30%左右，加大用于电动自行车胎生产的橡胶弹性体材料或其他具有良好性能、耐高温、弹性好、可再循环利用的复合材料的自主研发力度，逐步扩大免充气轮胎的应用市场，由共享单车逐步延伸到儿童玩具车、家庭用自行车和电动自行车市场，开发警用摩托车胎等高性能自行车胎，开发胎面厚度0.5 mm的丁基内胎，开发子午线摩托车外胎等高速重型的摩托车胎，自行车由代步交通工具向时尚的体育运动器械发展，自行车胎向着轻量化发展。
胶管胶带	输送带8.1亿平方米V带14亿条胶管20亿米	严格控制产能盲目扩张，提高产业自动化、智能化及信息化水平，向低浪费阻力的方向发展。产业集中度行业前10家销售收入占全国70%；V带产业集中度行业前10家销售收入占全国95%，企业竞争力有2家进入全球50强，主导产品有2-3件高端产品，至少有一家中国品牌进入世界名牌，特种输送带占比50%，提高芳纶、碳纤维、三元乙丙胶等高性能材料和结构转化率。



行业	“十四五”产量预测目标	规划目标
橡胶制品	密封制品45亿件减振制品25亿件工程橡胶制品0.06亿件电子家电橡胶制品15亿件	满足行业的需求，积极开发高端产品，提高行业自动化智能化水平，产业集中度（按工业总产值计）橡胶密封制品40%，橡胶减振制品50%，工程橡胶制品60%，汽车胶管制品60%，电子家电橡胶制品40%；预计到“十四五”末期，我国橡胶密封制品市场的需求将达到400亿元以上，其中高端橡胶密封制品市场的需求将在160亿元以上；重点发展高压回转马达密封、高压柱塞泵密封、高压柱塞密封及密封系统橡胶减振制品的发展是多元化的，根据不同使用条件向主动型、高温型、复合型等方向发展，总体发展趋势就是提高减振效能，同时提高产品寿命和可靠性。
胶鞋	15亿双	胶鞋行业从技术创新、绿色环保方面出发，提高产业集中度。提高行业的自动化、智能化及信息化水平。
乳胶	避孕套86亿只外科手套35亿副检查手套300亿只家用手套8亿副织物浸渍乳胶防护手套36亿副	国家仍然加大对医疗卫生单位的监督，在内需增长和国际市场需求下，需进一步调整产品结构，促进产业的健康发展。解决好天然橡胶乳胶蛋白过敏问题，加强新型弹性体材料在乳胶制品上的应用研究，为消费者提供安全舒适、健康环保、使用方便等高品质乳胶制品。
炭黑、白炭黑	炭黑608万吨白炭黑175万吨	90%企业利用湿气的汽电共生装置，80%企业能耗达标，实现智能制造，完成2-3个系列绿色轮胎专用炭黑的产业化开发，针对炭黑尾气锅炉产生的废气进行焚烧、投资少、运行费用低的脱氮、脱磷处理技术，对现有生产装置中核心设备如反应炉、耐火材料等关键技术加强研发与应用，实现炭黑核心技术专利2-3项，树立国内10家以上有影响力的白炭黑知名品牌，2-3家国际知名品牌，行业内可推广、可复制的智能化设备、节能和先进工艺不少于5项；通过科技投入，引导企业进行技术改造、技术升级，提高质量、降低成本，提高行业整体竞争能力，实现行业可持续发展。
废橡胶	再生胶500万吨胶粉、胶粒550万吨	通过协会标准的引领行业的技术进步，再生橡胶产品90%以上符合《E系再生橡胶》团体标准要求，建立5-10家具有广泛示范效应的生产基地，建立示范化绿色工厂；进一步加强设备研发，在常温破碎、常压连续脱胶、自动化设备上进一步取得突破性进展并普遍得到应用；鼓励水磨法、水切法胶粉生产应用，建设水磨法、水切法示范工厂；企业整体能耗达标率达到80%，行业整体自动化水平得到明显提升，破碎粉碎环节70%以上使用联动化破碎机、脱胶环节80%使用连续脱胶设备，压延80%使用联动自动化设备。



行业	“十四五”产量预测目标	规划目标
橡胶助剂	173万吨	橡胶助剂行业发展的速度平均在年5.7%， “十四五”末（2025年），行业集中度（前十名企业销售收入占全行业比率）≥75%，其中销售收入30亿元以上企业≥2家，20亿元以上企业≥4家。橡胶助剂行业90%以上实现清洁生产，大力推进橡胶硫化促进剂的清洁生产，淘汰污染物排放量大的落后工艺、落后产能。行业溶剂无水法MBT工艺、氧气氧化法TBB5工艺、双氧水法MBTS工艺覆盖率≥95%。
骨架材料	钢丝帘线277万吨胎圈钢丝100万吨胶管钢丝25万吨尼龙帘布33.7万吨聚酯帘线33.5万吨芳纶帘线0.3万吨	将产品升级换代放在首位，调整产品结构；开发高端品种和新骨架材料的应用，同时防止同质化发展。结合国内实际情况，“十四五”期间橡胶骨架材料行业在橡胶中推进应用的主要新材料：异型胎圈钢丝、三相合金镀层帘线、提高帘线强度；开发高模量低收缩的聚酯材料及尼龙66帘布条，以提高轮胎的相关性能及降低轮胎生产成本。

Zhu Hong said that during the “Thirteenth Five-Year Plan” period, the rubber industry has achieved outstanding results, but compared with the world’s rubber industry powerhouses, there is still a big gap. The “14th Five-Year Plan” period is the key five years for the transformation and upgrading of the rubber industry and the realization of high-quality development. It is also a critical stage for China’s rubber industry to become a world rubber industry power. To this end, the industry must adhere to independent innovation, improve the technical content of products; improve the level of intelligent manufacturing in the industry; save energy, protect the environment, and vigorously promote green production; strengthen industry self-discipline, cultivate brand products, and promote the healthy development of the industry; strengthen international production capacity cooperation, Adjust the industrial layout.

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