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# Top 10 News of China Rubber Industry in 2022

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1. Rubber industry suffers unprecedented difficulties

Affected by the domestic epidemic in the first half of the year and the end of the year, as well as the Russian-Ukrainian conflict and other factors beyond expectations, the downward pressure on the economic operation of the rubber industry continued to increase, manifested by a serious contraction of the domestic market, a significant decline in industry efficiency, a continuous rise in factory inventories, and a continuation of the low start-up rate. To this end, the China Rubber Industry Association in the first half of the organization tires, tire marketing, rubber materials, hose tape, force car tires, rubber machinery and molds, skeleton materials, rubber products and other key industry enterprises held an online forum to understand the problems of the industry, and timely report to the relevant state departments on the difficulties faced by the industry.

In 2022, raw materials such as rubber, carbon black, additives, cord fabric, steel cord and energy prices rose sharply, driving up the cost of rubber products enterprises and seriously eroding their profits. According to the statistics of the Rubber Association, from January to October, the industry's key member enterprises achieved a year-on-year (the same below) profit decline of 13.18%, the number of loss-making enterprises increased by 70.37%, and the amount of finished goods inventory increased by 27.69%, experiencing unprecedented difficulties since the outbreak of the epidemic. Although tire companies frequently raised prices during the year, but in the case of weak demand overlaid with rising costs, product prices can not be properly transmitted, resulting in high inventory of channels and production enterprises, tire companies are increasingly weak ability to bear pressure, in the rubber coordination research tire industry domestic main business profits fell by more than 50%. According to the profit statistics of key member enterprises in the rubber association, from January to October, the profit of each profession decreased more and increased less, including the profit of the force tire industry decreased by 17.81%, the hose tape industry decreased by 5.42%, the rubber products industry increased slightly 1.06%, the rubber shoe industry grew 29.30%, latex industry fell 15.77%, carbon black industry fell 78.55%, rubber machinery and mold industry fell 2.28%, comprehensive utilization of waste rubber industry fell 31.96%, rubber chemicals industry grew 16.34%, the skeleton material industry fell 47.79%.

According to the China Rubber Coordination Study, due to the severe contraction of the domestic market, the domestic all-steel tire capacity utilization rate in 2022 is about 60.8%, a decrease of 17.7 percentage points; semi-steel tire capacity utilization rate is about 70.2%, a decrease of 6.3 percentage points; all-steel tire replacement and repair consumption fell by about 30%, and semi-steel tire replacement and repair consumption fell by about 20%. According to the rubber association statistics, 1 to October, key tire enterprises radial tire production fell 5.12%, all-steel tire production fell 10.45%; most of the professional finished goods inventory amount is growing, including tire growth of 13.73%, force car tire growth of 9.05%, hose tape growth of 10.99%, rubber products growth of 10.59%, rubber shoes growth of 26.29%, latex fell 9.65%, carbon black growth of 50.20%, rubber machinery mold down 12.57%, waste rubber comprehensive utilization growth of 1.64%, skeleton material growth of 17.12%.

2. Tire companies through the judicial process to achieve a new breakthrough in trade friction

As foreign trade friction with China intensifies, domestic tire enterprises have made positive progress in defending their rights through judicial procedures. The case made a first instance ruling, ruling that all the "double anti" tariff order against the Chinese prosecution enterprises was withdrawn. On July 8, the EC issued the "Re-investigation Notice" and "Import Product Registration Procedures Open" notice, announcing that the EC abandoned the appeal, and the Chinese side locked the results of the first trial; at the same time, the EC decided to conduct a re-investigation on Chinese enterprises. At the same time, the EC decided to conduct re-investigation on Chinese enterprises that won the case. During the re-investigation period, the EU Customs will not impose "double anti" taxes on the litigating enterprises, and only the new measures may be paid after the re-investigation results are announced; after the re-investigation is completed,

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Mexican Tire Anti-Dumping Case, Complaint Response Meeting

On April 10th, China Rubber Industry Association held an analysis meeting on "Mexico's anti-dumping case against China's passenger cars and tires" in Beijing in an online + offline way (/newsdetail/64870.html)

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3 group standards of China National Rubber Association passed the review

On April 7, China Rubber Industry Association hosted the "Self Rubber Anti-corrosion Lining", "Test Methods for Grammage of Impregnated Cord Fabric" and (/newsdetail/64871.html)

- [ 04-13 ] Carbon Black World Congress, held for the first time in China! (/newsdetail/64876.html)
- [ 04-11 ] Tire technical reform project, topping out is completed! (/newsdetail/64869.html)
- [ 04-11 ] Demand recovery, tire companies net 200 million in a quarter!... (/newsdetail/64868.html)
- [ 04-10 ] Steady revenue growth, oak enterprises net profit of 1.7 billion yuan!... (/newsdetail/64865.html)

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Commerce ruled that the dumping margin of Senkylin tires was 4.41% in the first final anti-dumping review of the U.S. passenger car and light truck tires against China, and Senkylin Tire believed that the ruling allegedly violated the U.S. law and decided to engage a team of

lawyers to sue the U.S. Department of Commerce for the final ruling to the U.S. Court of International Trade. After four years of arguing, the U.S. Court finally ruled in favor of our claim and requested the U.S. Department of Commerce to recalculate the dumping duty rate for Senkylin. In June 2022, the U.S. Department of Commerce announced that the dumping duty rate for Senkylin tires was lowered to 1.27%.

3. General Administration of Customs to carry out tire processing trade unit consumption management reform to reduce the burden of enterprises

In order to promote foreign trade to maintain stability and improve quality, support the high-quality development of processing trade and enhance the core competitiveness of processing trade enterprises, the Inspection Department of the General Administration of Customs promoted the reform of the unit consumption management model of tire processing trade nationwide in 2022 on the basis of joint research, preliminary pilot (2 enterprises) and risk assessment with China Rubber Industry Association in 2021. In this regard, China Rubber Association has set up an industry unit consumption working group and formulated the "Industry Quota Parameters for Tire Processing Trade" as supporting materials for the comprehensive promotion of tire industry processing trade unit consumption management reform; cooperated with the relevant work of the General Administration of Customs and provided professional support as needed; at the same time, combined with the development of the industry, summarized the feedback from enterprises and communicated with the General Administration of Customs to explore the implementation of dynamic industry quota parameters. Management mode. Tire enterprises generally believe that the use of industry quota parameters for the implementation of management, for enterprises to save a lot of human and material resources, while avoiding the risk of business, has been the unanimous support of enterprises.

4. Industry associations actively promote the green and low-carbon development of the rubber industry

In order to promote the low-carbon development of the rubber industry, China Rubber Industry Association actively cooperates with the relevant state departments to implement the policy implementation and standard formulation and revision, while developing industry green development-related group standards, and innovating green tire safety week social public welfare publicity activities.

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In line with the implementation of national policies, for the Ministry of Industry and Information Technology and other four departments jointly issued the "raw materials industry," the implementation of the "three products" program, the Association from the tire industry development status, the "three products" implementation program on the tire industry, the tire industry to implement the guidance role of the tire industry. The "three products" implementation program of the main initiatives, such as authoritative interpretation, and put forward policy recommendations. Interpretation of the program pointed out that the tire industry to focus on the development of green low-carbon products, enriching the variety of new materials, optimize product design means, strengthen quality target management, improve the effectiveness of the quality system, the establishment of innovation evaluation system, build brand globalization development strategy, strengthen the upstream and downstream linkage and other seven aspects, accelerate the industry "increase variety, improve quality, create brand." To effectively promote the development mode of the industry from scale and speed to quality and efficiency transformation.

In the revision of national standards, firstly, in response to the Ministry of Industry and Information Technology's public consultation on the revision of mandatory national standards such as "car tires" (GB 9743) and "heavy vehicle tires" (GB 9744), the China National Tire Association organized experts from domestic and foreign tire enterprises to conduct in-depth discussions on the contents of the two national standards, and incorporated the tire rolling resistance and wet road grip limit values into the Chinese green tires in accordance with the China Green Tire Roadmap developed by the China National Tire Association. Roadmap into the standard. Secondly, the National Standards Committee included the two standards of "Tire Unit Product Energy Consumption Limit" (GB 29449-2012) and "Carbon Black Unit Product Energy Consumption Limit" (GB 29440-2012) in the integration and revision plan, and CRA was responsible for organizing and implementing the integration and revision of the standards. Through extensive data research, as well as analysis and processing of research data of enterprises, the boundary of the standards was redefined; the first proposal was made to separate raw material oil and fuel oil, and not to include raw material oil in the calculation of carbon black energy consumption, so that the energy consumption limit per unit product of carbon black was significantly reduced; the two products of tires and carbon black were integrated into one energy consumption standard, and the finalized "Rubber Industry (Tires and Carbon Black) Energy Consumption Limit per Unit Product Limit" for public comments. Third, the Ministry of Industry and Information Technology released the "Tire Industry Green Factory Evaluation Requirements" (HG/T 6061-2022) and "Tire Manufacturing Green Supply Chain Management Requirements" (HG/T 6062-2022), which were developed by the industry and organized by the China Rubber Association, with the implementation date of April 1, 2023. basis.

In terms of social welfare publicity, the China Rubber Tire Association has organized the "6-15 China Green Tire Safety Week" large-scale public welfare activities for eight consecutive years. It also opened a classroom for the tire boy to promote tire labeling and tire safety maintenance knowledge to the general consumers; opened a micro-vision number to spread the image of how to choose tires, read the numbers on tires, tire use and maintenance through WeChat videos, and also opened two special sessions for enterprises; recorded a total of 30 videos to improve the credibility of tire brands and popularize green tire knowledge to the public. Tire knowledge, and from the consumer side to promote the development of green upgrade of the tire industry.

##### 5. Tire companies restructuring investment in new hot spots

2022 domestic auto market new energy vehicle production and sales of a single, to China's independent brand tires brought opportunities, tire companies seize the opportunity to actively adjust the product structure, from the profile, pattern, formula, structure, materials, technology and other multi-dimensional technological innovation, new energy vehicle tires new products have been listed. Zhongce, Linglong, Sen Kirin, Puling Chengshan and other enterprises in the field of new energy tires ahead of the layout, is the world's first batch of R & D and manufacturing of new energy tires, has achieved technical maturity, quality maturity, production maturity, and is forming a sustained leading R & D capabilities and manufacturing capabilities. Truck and bus production and sales continue to be sluggish, some foreign companies adjust their operating strategies and exit the Chinese truck and bus tire market. On April 6, Feng Shen tire with a total investment of 95.01 million yuan, the annual output of 30,930 large-size wide-body dump truck with engineering radial tire quality improvement project started; April 19, Haian Group with a total investment of 7 billion yuan, including an annual output of 300,000 all-steel large engineering radial tires, 15,000 all-steel giant engineering radial tires and other projects started; September 13, Zhongce Tianjin high-end green tire manufacturing industry chain upgrading a project - agricultural radial tires and twill engineering tire workshop expansion project started; Guizhou tire to accelerate the implementation of 380,000 all-steel engineering radial tire intelligent manufacturing project. In addition, Sai Lun Group, Fengshen Tire, Shuangqian Tire, Linglong Tire and other enterprises also issued announcements or environmental assessment public notice, phased investment in the construction of off-highway tire projects, products covering giant tires, large and small and medium-sized engineering tires, agricultural radial tires, small industrial tires, solid tires and other products.

#### 6. Rubber industry leading companies have merged and reorganized

Since 2022, domestic rubber enterprises have been frequently merged and reorganized, and many industry leaders are involved in them. on January 30, Zhongce Rubber and Tianjin Guolian mixed formally established Zhongce Rubber (Tianjin) Co. and officially opened on April 3, Zhongce Tianjin plans to invest 2.8 billion yuan in 3 years to make the Tianjin plant the largest off-highway tire production plant in Asia. Daye completed the acquisition of Shengtong Steel Cord and started the consolidated statement from May. on June 1, Heavy Industry -On June 29, Dalian Heavy Industry Equipment Group Co., Ltd. was listed after the restructuring of Dalian Rubber & Plastics and Jinzhou Heavy Machinery. Ltd. intends to acquire 77% equity interest in Nantong Haili, the largest domestic recycled rubber enterprise, for RMB331 million; on August 16, Nantong Haili has completed the registration procedures for industrial and commercial changes and is fully engaged in the construction of a new factory, planning to resume butyl recycled rubber production capacity by the end of the year. On November 16, Hainan Rubber disclosed its intention to acquire 36% equity interest of Sinochem International's listed company in Singapore (Hersheng), i.e. Sinochem International's natural rubber business segment, by cash payment. In addition, on September 22, Anhui Zhongding Seals Co., Ltd. made an announcement to jointly establish Huzhou Hongtian Equity Investment Partnership (Limited Partnership) with other investors, through which it will expand its business in the field of new energy vehicles; on December 23, the company made another announcement to acquire 100% equity interests in SchmitterGroup GmbH (Schmitter) and Jinmeijia Electronics (Shenzhen) Co. Ltd. to accelerate the development of its triboelectric cooling system and fluid piping system assembly products in the field of new energy vehicles.

#### 7. Outstanding achievements in science and technology innovation in the rubber industry

In 2022, the rubber industry insisted on low-carbon emission reduction, innovative development and outstanding achievements in science and technology innovation. 7 projects were included in the public list of the 2022 China Petroleum and Chemical Industry Federation Science and Technology Award, of which 4 projects won the second prize of the Science and Technology Progress Award: four international standards for RFID electronic tags for tires, key technology and application of mesh-type load-free pneumatic hollow tires, high dimer content TMQ Green Synthesis Process Development and Industrialization Project of Rubber Antioxidant, Green Key Technology Development of High Performance Insoluble Sulfur Yellow; 3 projects won the Third Prize of Science and Technology Progress Award: Key Technology and Industrialization of Heat Resistant Oxygen Resistant Cut Tires Based on Low Temperature Balanced Curing, Industrialization Technology and Application of High Performance Terpene Resin for Green Tires, Technology Development and Industrial Application of High Aromatic Carbon Environmental Protection Aromatic Rubber Oil. 5 projects were selected for the Seventh China Industry Award, Commendation Award, Nomination Award candidate enterprises and projects, China Industry Award candidate projects: National Rubber and Tire Engineering Technology Research

The project of "Public Relations and Application Demonstration of Key Technologies of the Whole Industry Chain of Rubber Tires" of the Research Center; Candidates for China Industry Award Commendation: "Intelligent Manufacturing in Tire Industry" of Qingdao Senkylin Tire Co. Ltd.'s "Research and Application of Intelligent Green Manufacturing Technology Based on Big Data, AI, IOT and Other Information Technologies"; China Industry Award Nomination Candidate: Shandong Weipus Rubber Co. Ltd.'s "Five Compound Rubber Extrusion Unit Development" project. In addition, Dalian Rubber and Plastic Machinery Co., Ltd. won the "Ninth Liaoning Governor's Quality Award Silver Award". Triangle Tire's C919 aviation radial tire project for domestic aircraft won the gold medal in the fourth "Governor's Cup" industrial design competition in Shandong Province. The key technology development and industrialization application project of continuous liquid-phase compounding of synthetic rubber jointly carried out by Yiwei Rubber Research Institute, Yikai New Material and Sailun Group won the first prize of Shandong Provincial Technical Invention Award in 2022, which is the first time in the world to achieve subversive innovation of traditional rubber compounding technology. Sai Lun Group, Zhongce Rubber, Chengshan Group, Yanggu Huatai, Beijing Rubber Industry Research and Design Institute and China Chemical Industry Guilin Engineering Co., Ltd. entered the list of "China Petroleum and Chemical Industry Technology Innovation Demonstration Enterprises" in 2022.

#### 8. Rubber companies increase investment in overseas projects to accelerate internationalization

With the gradual recovery of foreign markets in 2022, domestic rubber enterprises have increased investment in overseas projects to accelerate the process of internationalization. On January 27, the foundation stone laying ceremony was held for the Cambodia project with a total investment of 1.9 billion yuan for General Motors, which is expected to have an annual production capacity of 5 million semi-steel radial tires and 900,000 all-steel radial tires. On March 28, Longma Tire held the inauguration ceremony for its joint venture in Pakistan, Servius Longma Tire (Private) Co. On May 19, the first overseas factory of Sheng'ao Chemical was officially put into operation in Thailand and the first batch of orders were successfully shipped. On October 3, the land signing ceremony of the second phase project of Xingda Steel Cord (Thailand) Co. Senkylin Tire Spain project passed the approval of the Spanish Parliament of Galicia and was recognized as a strategic industrial project. The plant is planned to produce 12 million high performance car and light truck radial tires per year. The expansion project of Twin Star Kumho Vietnam Plant entered the final stage, all administrative procedures related to the trial run have been completed, Qingdao Twin Star wholly-owned subsidiary directly holds 42.409% of the equity of Kumho Vietnam Plant. 27th December, the groundbreaking ceremony of the second plant of Haomai (Thailand) Co.

#### 9. Exports have become a bright spot to drive industry growth

In 2022, the domestic market shrank severely, and exports became the bright spot to pull the industry growth. According to the statistics of key member enterprises in the rubber association, from January to October, except for the force car tires, latex and waste rubber comprehensive utilization of three professional export delivery value fell year-on-year, the rest of the professional have increased significantly, the industry-wide export rate (value) of 35.67%, tire and mold professional export rate (value) close to 50%. Among them, the export delivery value of carbon black increased by 60.95%, additives increased by 37.16%, rubber shoes increased

23.65%, 23.64% growth in hose tape, 17.42% growth in tires, 16.69% growth in skeleton materials, 4.54% growth in molds, and a slight increase of 0.04% in rubber products. Tire exports accounted for 51.65% of all production in the first half of 2022, exceeding 50% for the first time, the highest percentage ever. In the case of a decline in total tire production, the export volume accounted for more than 50%, indicating that foreign sales support the operation of the industry. But after July, tire export sales began to pressure, according to customs statistics, August to November, the month of tire exports were down in the ring, including November tire exports with the ring than the double drop; 1 to November, the cumulative export volume of rubber tires increased by 5.1%, an increase of 2.4 percentage points less than the first 10 months, the export value increased by 16.4%.

#### 10. Rubber additives and skeleton material industry respectively celebrate the birthday

Seventy years ago, in 1952, Shenyang New Life Chemical Factory and Nanjing Chemical Factory built rubber accelerator and rubber antioxidant production units respectively, with a total output of 38 tons in that year, thus opening up China's rubber chemicals industry. 70 years later, China's rubber chemicals industry has grown from scratch, from small to large, from big to strong, entering a new period of green, intelligent and microchemical. According to the statistical estimation of Rubber Additives Special Committee of China Rubber Association, the domestic production of rubber additives will reach about 1.4 million tons in 2022, accounting for 76.2% of the global production capacity, with the ability to ensure a stable global supply and an absolute right to speak in the international arena. Through technological innovation, the promotion of clean production technology, compared with the "12th Five-Year Plan" at the end of the "13th Five-Year Plan" tons of

rubber chemicals products to reduce energy consumption by about 30%; product green rate of more than 92%, the effectiveness of structural adjustment; promoter clean production process Innovation has made significant achievements, the overall level of clean production technology in the industry has reached the international advanced level. In recent years, new processes have emerged in the industry, such as Yanggu Huatai insoluble sulfur yellow continuous production process, greatly reducing production costs, becoming the third company in the world to master the process; Sheng'ao Chemical high content antioxidant TMQ, using a new liquid catalyst developed independently, the development of continuous flow reactor preparation, to achieve continuous production; Weilin New Materials in conjunction with Tsinghua University to develop a continuous flow process for the preparation of vulcanization The continuous flow process for the preparation of vulcanization accelerator MBTS has reduced the "three wastes" and improved the production efficiency; Comai Chemical has developed a continuous flow process for the preparation of vulcanization accelerator CBS and TBBS; Shandong Shangshun has developed a continuous process for the production of vulcanization accelerator MBT with an annual capacity of 60,000 tons in conjunction with Tsinghua University and will be put into production soon. These advanced processes signify the continuous advancement of enterprises on the road of innovation. Industry entrepreneurs forge ahead to create a number of influential enterprises in the international arena, a number of enterprises or a single product production and sales volume ranked first in the world, China's rubber chemicals industry has stepped into the ranks of the world's leading countries, a number of products in the world's leading position.

In 2002, in response to the development needs of the rubber industry, the Rubber Skeleton Material Committee was established. 20 years later, the Rubber Skeleton Material Committee has been committed to promoting the technological progress, green and intelligent development of the industry, and the skeleton material industry has made rapid development. 2002, China's steel cord production of 92,000 tons, bead wire production of 155,000 tons, nylon cord fabric production of 236,000 tons, and polyester cord fabric production of 18,000 tons. In 2002, China produced 92,000 tons of steel cord, 155,000 tons of tire bead wire, 236,000 tons of nylon cord fabric, and 18,000 tons of polyester cord fabric; today, China is the world's largest producer and consumer of rubber frame materials, with the global production of major products accounting for more than 50%. At present, the total capacity of domestic steel cord reaches 3.45 million tons, accounting for about 63% of the world; the total capacity of tire bead steel wire is 1.35 million tons, accounting for about 56% of the world; the total capacity of nylon cord fabric is about 500,000 tons, accounting for about 52% of the world; the total capacity of polyester cord fabric is about 1.5 million tons.

420,000 tons, accounting for 53% globally. The capacity of the five head enterprises in each sub-sector accounts for 62% to 78% of the total domestic production capacity, with a high degree of industry concentration. Since the "Thirteenth Five-Year Plan", domestic key skeleton material enterprises have been exploring and practicing in intelligent manufacturing, and many enterprises have carried out intelligent transformation, basically realizing the automation of internal transportation, finished product packaging and storage management, and some leading enterprises have realized the intelligent manufacturing of production and testing links.

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