



# Global and China Automotive Tire Industry Report, 2010-2011

Nov. 2011

## ***This report***

- ◆ **Analyzes Global and China automotive tire industry**
- ◆ **Focuses on tire market**
- ◆ **Highlights the major tire manufacturers worldwide .**

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## Abstract

In 2010, global tire market size approximated US\$160 billion. In 2011, the European and North American markets of CV (Commercial Vehicle) tire presented strong recovery.

It is expected that, CV output in Europe will reach 540,000 units in 2011, a rise of 37% from 395,000 units in 2010; and CV output in North America will soar 48% from 254,000 units in 2010 to 375,000 units in 2011. The output of commercial vehicle in Asia is estimated to hit 2.366 million units in 2011, a slight rise from 2.342 million units in 2010. The depressed Asia-Pacific market was mainly ascribed to the enforcement of tight monetary policy in China as well as the severe Earthquake in Japan.

In particular, medium-truck among commercial vehicle showed robust resilience. The OE tire of medium-truck grew 48% in Europe, 60% in North America and even high up to 114% in Africa and the Middle East, while it fell around 8% in Asia-Pacific. In the replacement market, it rose 12% or so in Europe, about 15% in North America, and just 5% in Asia-Pacific.

The majority of local Chinese tire producers take CV tire as their core business as the passenger car tire market is dominated by foreign vendors. Even if the quality problem of Kumho tire is exposed by CCTV, South Korean companies still firmly sweep 30% shares of Chinese passenger car tire OE market; around 60% shares are seized by corporations from Japan, Europe and America, and the remaining 10% goes to Chinese local companies.

In 2011, Chinese commercial vehicle market is depressed, and most companies strive to explore overseas markets. Even faced with trade disputes, the revenue of Chinese tire manufacturers increased significantly due to the sound CV market situation in Europe and America. Approximately 75% of Chinese local tire enterprises are concentrated in Shandong province whose tire export accounts for roughly 80% of national total tire export. From January to September of 2011, the export value of Shandong province achieved US\$5.662 billion, a 58.88% rise from 2010.

## Revenue and Operating Margin of Top 20 Tire Vendors Worldwide, 2010-2011

	2010 (\$ mln)	2011E (\$ mln)	Growth Rate	Operating Margin, 2010	Operating Margin, 2011
Michelin	23696	28398	19.8%	9.5%	9.6%
Bridgestone	29200	32028	9.7%	6.4%	6.9%
Goodyear	18832	21218	11.3%	4.9%	7.2%
Continental	13460	16184	20.2%	15.2%	14.0%
Pirelli	6326	7738	22.3%	9.5%	10.8%
Sumitomo	5838	7085	21.4%	4.5%	6.7%
Hankook	4943	5716	15.6%	11.5%	11.0%
Yokohama	4691	4998	6.5%	5.7%	5.5%
Zhongce Rubber	3345	4286	28.1%		
Cooper	3360	3958	17.8%	5.6%	4.5%
Cheng Shin	3256	3868	18.8%	11.9%	10.8%
Kumho	3026	3627	19.8%	3.6%	7.3%
Toyo	2506	2969	18.5%	4.1%	5.3%
Triangle	2262	2894	27.9%		
Apollo Tyres	1943	2538	30.6%	4.9%	5.3%
GITI	2370	2528	6.7%		
MRF	1740	2408	38.4%		
Linglong	1429	2324	62.6%		
Nokian	1402	2053	46.4%	21.0%	27.4%
Double Coin	1344	1685	25.4%		

Another reason for the substantial rise in revenue is the price hike of tires. Due to the mounting pressure of the rising cost of raw materials, nearly all tire companies raise the prices. As revenue increases, profit somewhat falls. Most of Chinese tire companies just make meager profit. According to the data of China Rubber Industry Association, from January to July, the loss-making percentage of the entire industry was up to 25%, but the average profit margin was merely 3%.

Continental is not only one of the tire giants in first echelon but the tire corporation with most profit. In June 2011, Kumho Tire expected its annual sales would approximate US\$3.91 billion; moreover, the operating margin also rose greatly as it was reorganized in 2011.

The two India-based companies Apollo Tyres and MRF presented significant growth. Finland-based Nokian also saw remarkable growth powerfully driven by the Russian market.

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