



**Global and China Tire Industry
Report, 2014-2015**

Apr. 2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

The report highlights:

1. Global Automobile Industry and Market;
2. China Automobile Industry and Market;
3. Global Tire Industry and Market;
4. Tire Industry and Market in China and the United States;
5. 26 Typical Tire Vendors.

2014 marked a bumper year for the tire industry. The declining price of natural rubber helped substantial cost reduction of tire vendors; the tire price performed more stably than the costs although it dropped as well. Despite the shrunk revenue in 2014, almost all tire producers saw higher profit margins. This situation continues in 2015, reflected in the falling price of natural rubber and the slight decline in the tire price.

What comes to the momentous event in the tire industry in 2015 is that the state-owned Sinochem is probable to acquire the shares of the world's fifth largest tire company -- Pirelli to demonstrate the strength of China in the capital field, which is a blockbuster in the tire industry. For a long time, Chinese tire makers have not found a way into the field of sedan OE Tires, so they primarily target RT and truck tire markets. Pirelli is the most important tire supplier for BMW, and the second largest supplier for Mercedes-Benz, also one of Ford's main suppliers. Through the acquisition of Pirelli, Chinese vendors have begun to supply OE Tires for luxury cars.

Revenue of Top 30 Tire Vendors Worldwide, 2010-2014

(USD mln)

	2010	2011	2012	2013	2014
Bridgestone	28,200	28,593	31,965	30,989	29,136
Michelin	23,696	26,829	27,590	26,927	25,947
Goodyear	18,832	22,767	20,992	19,540	18,138
Continental	10,460	11,529	12,418	12,745	12,997
Pirelli	6,326	7,783	7,749	8,134	7,981
Sumitomo	5,838	6,716	7,463	6,973	6,903
Hankook	4,943	5,692	6,242	6,447	6,344
Yokohama	4,691	5,081	5,357	6,159	5,903
Cheng Shin Tire	3,256	4,268	4,631	4,478	4,248
Zhongce	3,345	4,286	4,558	4,529	3,790
Giti Tyre	3,870	4,189	3,970	3,817	3,710
Cooper	3,360	3,908	4,201	3,439	3,425
Kumho	3,026	3,435	3,595	3,378	3,265
Toyo	2,506	2,969	3,088	2,962	2,948
Triangle Tyre	2,262	2,601	2,709	2,712	2,849
MRF	1,740	2,408	2,455	2,293	2,400
Apollo Tires	1,943	2,271	2,448	2,214	2,235
Titan International	882	1,487	1,821	2,164	1,896
Nokian	1,402	1,967	2,071	2,023	1,845
Double Coin	1,344	1,692	1,921	1,888	1,834
Xingyuan Tire	1,040	1,357	1,528	1,776	1,798
SailunTire	407	640	1,141	1,143	1,760
Nexen	1,157	1,472	1,684	1,578	1,670
Linglong Tire	1,429	2,324	2,068	1,884	1,660
AeolusTyre	1,199	1,586	1,431	1,456	1,325
Shengtai Tire	918	1,150	1,140	1,248	1,218
JK Tire	1,303	1,216	1,191	1,120	1,140
P.T Gajah Tunggal Tbk	986	1,236	1,254	1,047	1,100
Kenda	911	1,021	1,063	1,119	1,068
Ceat	760	966	897	1,002	958

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In future, Chinese companies may make more acquisitions to expand the market, obtain technologies and avoid the anti-dumping investigation of the United States. Finland-based Nokian, America-based Titan and CTP, Russia-based Nizhnekamskshina and OJSC, as well as Belarus-based JSC Belshina Belarus are likely to be potentially taken over. If Chinese companies take over Nokian, they will seize the excellent winter tire technology.

Chinese tire enterprises, especially private ones, have a high debt ratio and high financial leverage, which are vulnerable to be in bankruptcy in case of a slight decline in the market. For example, Deruibao Tire earned the revenue of close to USD1 billion with the 35th ranking worldwide in 2013, but it suddenly announced bankruptcy in February 2015.

China tire industry, especially the truck tire field, is facing serious overcapacity. Along with the decline in China's fixed investments and real estate, the demand for trucks contracts sharply, the highly competitive highway logistics industry sees low profits and minimizes the changes of tires. The US's anti-dumping investigation is almost a fatal blow on Chinese tire companies, but China still releases more truck tire capacity. In 2015, the new tire capacity hits up to 120 million and the overcapacity rate is 20%-25%.

In Chinese OE tire market, the market share of South Korean giants Hankook and Kumho Tire slumped because of consecutive quality problems. By contrast, the market share of Japan-based Dunlop and the US-based Goodyear soared, particularly Dunlop's market share almost doubled in 2014. China-based Triangle Tire and Giti Tire also witnessed significant growth.

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