

# Global Tire Cord Fabrics Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Tire Cord Fabrics market size is expected to reach \$ 19568 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

In 2025, global Tire Cord Fabrics production capacity is 10 million tons, with production reached approximately 6.44 million tons, with an average global market price of around US\$ 2,089 per ton. The market gross margin is mainly 30%-40%.

Tire cord fabrics, also known as tire cord textiles or tire reinforcement fabrics, are textile materials used in the construction of tires to provide structural strength, stability, and durability. These fabrics play a crucial role in reinforcing the tire and ensuring it can withstand the stresses and loads experienced during vehicle operation. Tire cord fabrics are typically made from materials such as nylon, polyester, rayon, aramid, or steel, and they are woven or constructed in a specific manner to meet the tire's performance requirements.

The Tire Cord Fabrics (TCF) industrial chain starts upstream with raw materials, primarily industrial yarns and wires. Key inputs include polyester (PET) industrial yarn, nylon (PA6/PA66) yarn, high-carbon steel wire rod, and specialty fibers such as aramid. These materials are supplied by petrochemical producers, chemical fiber manufacturers, and steel wire companies, where feedstock price volatility (oil, caprolactam, PTA, steel) directly affects cost structures.

The midstream segment consists of tire cord fabric manufacturers, which carry out yarn twisting, dipping (RFL treatment), weaving or cabling, and heat-setting processes. This stage is technology- and capital-intensive, requiring tight control over adhesion, tensile strength, fatigue resistance, and dimensional stability. Product portfolios typically

include PET cord fabric, nylon cord fabric, steel cord, and hybrid cord structures, tailored for different tire types.

The downstream market is dominated by tire manufacturers, including producers of passenger car tires, truck & bus radial (TBR) tires, off-the-road (OTR) tires, agricultural tires, and specialty tires. Demand is closely linked to global vehicle production, replacement tire cycles, infrastructure activity, mining, and agricultural mechanization.

The global Tire Cord Fabrics market is expected to maintain steady medium-term growth, driven by structural demand from the tire industry and long replacement cycles. Growth is underpinned by expanding vehicle parc worldwide, especially in emerging markets, where replacement tire demand increasingly outweighs OEM demand.

From a material perspective, polyester tire cord fabrics will remain the dominant segment due to their favorable balance of cost, performance, and dimensional stability, particularly in passenger car and light truck radial tires. Steel cord demand will continue to grow in line with truck, bus, and OTR tire production, supported by infrastructure investment, mining activity, and logistics expansion. Nylon cord fabrics are expected to remain stable, retaining their role in agricultural and heavy-duty bias tires where impact resistance and fatigue performance are critical. Aramid and hybrid cords will see niche growth in high-performance, aviation, and premium OTR applications, though their overall volume contribution will remain limited by cost.

Regionally, Asia-Pacific will continue to be the largest and fastest-growing market, driven by China, India, and Southeast Asia, benefiting from expanding vehicle fleets and local tire manufacturing capacity. North America and Europe will show more mature growth, primarily supported by replacement demand and higher value-added tire segments.

Key industry trends include light-weighting, higher durability requirements, and sustainability pressures, pushing cord manufacturers toward higher-modulus materials, longer fatigue life, and recycled or bio-based inputs. At the same time, the market faces challenges from raw material price volatility, trade barriers, and customer concentration, reinforcing the importance of scale, technology differentiation, and long-term supply relationships.

This report studies the global Tire Cord Fabrics production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tire Cord Fabrics and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Tire Cord Fabrics that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Tire Cord Fabrics total production and demand, 2021-2032, (K Tons)

Global Tire Cord Fabrics total production value, 2021-2032, (USD Million)

Global Tire Cord Fabrics production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Tons), (based on production site)

Global Tire Cord Fabrics consumption by region & country, CAGR, 2021-2032 & (K Tons)

U.S. VS China: Tire Cord Fabrics domestic production, consumption, key domestic manufacturers and share

Global Tire Cord Fabrics production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Tons)

Global Tire Cord Fabrics production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

Global Tire Cord Fabrics production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

This report profiles key players in the global Tire Cord Fabrics market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hyosung, Junma, Indorama Ventures, Kordsa Global, Kolon Industries, Shenma, SRF Ltd, Haiyang Chemical, Hailide, Teijin, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Tire Cord Fabrics market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by

year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

#### Global Tire Cord Fabrics Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Tire Cord Fabrics Market, Segmentation by Type:

Steel Tire Cord

Nylon Tire Cord

Polyester Tire Cord

Rayon Tire Cord

Hybrid Tire Cord

Aramid

#### Global Tire Cord Fabrics Market, Segmentation by Technical Performance Level:

Standard Tire Cord

HMLS Tire Cord

Others

Global Tire Cord Fabrics Market, Segmentation by End-User:

Auto Tire Cord

OTR Tire Cord

Others

Global Tire Cord Fabrics Market, Segmentation by Application:

Radial Tire

Bias Tire

Companies Profiled:

Hyosung

Junma

Indorama Ventures

Kordsa Global

Kolon Industries

Shenma

SRF Ltd

Haiyang Chemical

Hailide

Teijin

Century Enka

Jinlun Group

Maduratex

Far Eastern Group

Shifeng

Firestone

Dikai

Helon Polytex

Taiji

Cordenka

Bestory

Unifull

DONGPING JINMA

### **Key Questions Answered:**

1. How big is the global Tire Cord Fabrics market?
2. What is the demand of the global Tire Cord Fabrics market?
3. What is the year over year growth of the global Tire Cord Fabrics market?
4. What is the production and production value of the global Tire Cord Fabrics market?
5. Who are the key producers in the global Tire Cord Fabrics market?

6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Tire Cord Fabrics Introduction
- 1.2 World Tire Cord Fabrics Supply & Forecast
  - 1.2.1 World Tire Cord Fabrics Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Tire Cord Fabrics Production (2021-2032)
  - 1.2.3 World Tire Cord Fabrics Pricing Trends (2021-2032)
- 1.3 World Tire Cord Fabrics Production by Region (Based on Production Site)
  - 1.3.1 World Tire Cord Fabrics Production Value by Region (2021-2032)
  - 1.3.2 World Tire Cord Fabrics Production by Region (2021-2032)
  - 1.3.3 World Tire Cord Fabrics Average Price by Region (2021-2032)
  - 1.3.4 India Tire Cord Fabrics Production (2021-2032)
  - 1.3.5 South Korea Tire Cord Fabrics Production (2021-2032)
  - 1.3.6 China Tire Cord Fabrics Production (2021-2032)
  - 1.3.7 China Taiwan Tire Cord Fabrics Production (2021-2032)
  - 1.3.8 Japan Tire Cord Fabrics Production (2021-2032)
  - 1.3.9 Turkey Tire Cord Fabrics Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Tire Cord Fabrics Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Tire Cord Fabrics Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Tire Cord Fabrics Demand (2021-2032)
- 2.2 World Tire Cord Fabrics Consumption by Region
  - 2.2.1 World Tire Cord Fabrics Consumption by Region (2021-2026)
  - 2.2.2 World Tire Cord Fabrics Consumption Forecast by Region (2027-2032)
- 2.3 United States Tire Cord Fabrics Consumption (2021-2032)
- 2.4 China Tire Cord Fabrics Consumption (2021-2032)
- 2.5 Europe Tire Cord Fabrics Consumption (2021-2032)
- 2.6 Japan Tire Cord Fabrics Consumption (2021-2032)
- 2.7 South Korea Tire Cord Fabrics Consumption (2021-2032)
- 2.8 ASEAN Tire Cord Fabrics Consumption (2021-2032)
- 2.9 India Tire Cord Fabrics Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Tire Cord Fabrics Production Value by Manufacturer (2021-2026)
- 3.2 World Tire Cord Fabrics Production by Manufacturer (2021-2026)
- 3.3 World Tire Cord Fabrics Average Price by Manufacturer (2021-2026)
- 3.4 Tire Cord Fabrics Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Tire Cord Fabrics Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Tire Cord Fabrics in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Tire Cord Fabrics in 2025
- 3.6 Tire Cord Fabrics Market: Overall Company Footprint Analysis
  - 3.6.1 Tire Cord Fabrics Market: Region Footprint
  - 3.6.2 Tire Cord Fabrics Market: Company Product Type Footprint
  - 3.6.3 Tire Cord Fabrics Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Tire Cord Fabrics Production Value Comparison
  - 4.1.1 United States VS China: Tire Cord Fabrics Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Tire Cord Fabrics Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Tire Cord Fabrics Production Comparison
  - 4.2.1 United States VS China: Tire Cord Fabrics Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Tire Cord Fabrics Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Tire Cord Fabrics Consumption Comparison
  - 4.3.1 United States VS China: Tire Cord Fabrics Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Tire Cord Fabrics Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Tire Cord Fabrics Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Tire Cord Fabrics Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Tire Cord Fabrics Production Value (2021-2026)

4.4.3 United States Based Manufacturers Tire Cord Fabrics Production (2021-2026)  
4.5 China Based Tire Cord Fabrics Manufacturers and Market Share

4.5.1 China Based Tire Cord Fabrics Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Tire Cord Fabrics Production Value (2021-2026)

4.5.3 China Based Manufacturers Tire Cord Fabrics Production (2021-2026)

4.6 Rest of World Based Tire Cord Fabrics Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Tire Cord Fabrics Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Tire Cord Fabrics Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Tire Cord Fabrics Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Tire Cord Fabrics Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Steel Tire Cord

5.2.2 Nylon Tire Cord

5.2.3 Polyester Tire Cord

5.2.4 Rayon Tire Cord

5.2.5 Hybrid Tire Cord

5.2.6 Aramid

5.3 Market Segment by Type

5.3.1 World Tire Cord Fabrics Production by Type (2021-2032)

5.3.2 World Tire Cord Fabrics Production Value by Type (2021-2032)

5.3.3 World Tire Cord Fabrics Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY TECHNICAL PERFORMANCE LEVEL**

6.1 World Tire Cord Fabrics Market Size Overview by Technical Performance Level: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Technical Performance Level

6.2.1 Standard Tire Cord

6.2.2 HMLS Tire Cord

6.2.3 Others

6.3 Market Segment by Technical Performance Level

6.3.1 World Tire Cord Fabrics Production by Technical Performance Level  
(2021-2032)

6.3.2 World Tire Cord Fabrics Production Value by Technical Performance Level  
(2021-2032)

6.3.3 World Tire Cord Fabrics Average Price by Technical Performance Level  
(2021-2032)

## **7 MARKET ANALYSIS BY END-USER**

7.1 World Tire Cord Fabrics Market Size Overview by End-User: 2021 VS 2025 VS 2032

7.2 Segment Introduction by End-User

7.2.1 Auto Tire Cord

7.2.2 OTR Tire Cord

7.2.3 Others

7.3 Market Segment by End-User

7.3.1 World Tire Cord Fabrics Production by End-User (2021-2032)

7.3.2 World Tire Cord Fabrics Production Value by End-User (2021-2032)

7.3.3 World Tire Cord Fabrics Average Price by End-User (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Tire Cord Fabrics Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Radial Tire

8.2.2 Bias Tire

8.3 Market Segment by Application

8.3.1 World Tire Cord Fabrics Production by Application (2021-2032)

8.3.2 World Tire Cord Fabrics Production Value by Application (2021-2032)

8.3.3 World Tire Cord Fabrics Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Hyosung

9.1.1 Hyosung Details

- 9.1.2 Hyosung Major Business
- 9.1.3 Hyosung Tire Cord Fabrics Product and Services
- 9.1.4 Hyosung Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Hyosung Recent Developments/Updates
- 9.1.6 Hyosung Competitive Strengths & Weaknesses
- 9.2 Junma
  - 9.2.1 Junma Details
  - 9.2.2 Junma Major Business
  - 9.2.3 Junma Tire Cord Fabrics Product and Services
  - 9.2.4 Junma Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.2.5 Junma Recent Developments/Updates
  - 9.2.6 Junma Competitive Strengths & Weaknesses
- 9.3 Indorama Ventures
  - 9.3.1 Indorama Ventures Details
  - 9.3.2 Indorama Ventures Major Business
  - 9.3.3 Indorama Ventures Tire Cord Fabrics Product and Services
  - 9.3.4 Indorama Ventures Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 Indorama Ventures Recent Developments/Updates
  - 9.3.6 Indorama Ventures Competitive Strengths & Weaknesses
- 9.4 Kordsa Global
  - 9.4.1 Kordsa Global Details
  - 9.4.2 Kordsa Global Major Business
  - 9.4.3 Kordsa Global Tire Cord Fabrics Product and Services
  - 9.4.4 Kordsa Global Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 Kordsa Global Recent Developments/Updates
  - 9.4.6 Kordsa Global Competitive Strengths & Weaknesses
- 9.5 Kolon Industries
  - 9.5.1 Kolon Industries Details
  - 9.5.2 Kolon Industries Major Business
  - 9.5.3 Kolon Industries Tire Cord Fabrics Product and Services
  - 9.5.4 Kolon Industries Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 Kolon Industries Recent Developments/Updates
  - 9.5.6 Kolon Industries Competitive Strengths & Weaknesses
- 9.6 Shenma

- 9.6.1 Shenma Details
- 9.6.2 Shenma Major Business
- 9.6.3 Shenma Tire Cord Fabrics Product and Services
- 9.6.4 Shenma Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Shenma Recent Developments/Updates
- 9.6.6 Shenma Competitive Strengths & Weaknesses
- 9.7 SRF Ltd
  - 9.7.1 SRF Ltd Details
  - 9.7.2 SRF Ltd Major Business
  - 9.7.3 SRF Ltd Tire Cord Fabrics Product and Services
  - 9.7.4 SRF Ltd Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 SRF Ltd Recent Developments/Updates
  - 9.7.6 SRF Ltd Competitive Strengths & Weaknesses
- 9.8 Haiyang Chemical
  - 9.8.1 Haiyang Chemical Details
  - 9.8.2 Haiyang Chemical Major Business
  - 9.8.3 Haiyang Chemical Tire Cord Fabrics Product and Services
  - 9.8.4 Haiyang Chemical Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Haiyang Chemical Recent Developments/Updates
  - 9.8.6 Haiyang Chemical Competitive Strengths & Weaknesses
- 9.9 Hailide
  - 9.9.1 Hailide Details
  - 9.9.2 Hailide Major Business
  - 9.9.3 Hailide Tire Cord Fabrics Product and Services
  - 9.9.4 Hailide Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Hailide Recent Developments/Updates
  - 9.9.6 Hailide Competitive Strengths & Weaknesses
- 9.10 Teijin
  - 9.10.1 Teijin Details
  - 9.10.2 Teijin Major Business
  - 9.10.3 Teijin Tire Cord Fabrics Product and Services
  - 9.10.4 Teijin Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.10.5 Teijin Recent Developments/Updates
  - 9.10.6 Teijin Competitive Strengths & Weaknesses

## 9.11 Century Enka

9.11.1 Century Enka Details

9.11.2 Century Enka Major Business

9.11.3 Century Enka Tire Cord Fabrics Product and Services

9.11.4 Century Enka Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Century Enka Recent Developments/Updates

9.11.6 Century Enka Competitive Strengths & Weaknesses

## 9.12 Jinlun Group

9.12.1 Jinlun Group Details

9.12.2 Jinlun Group Major Business

9.12.3 Jinlun Group Tire Cord Fabrics Product and Services

9.12.4 Jinlun Group Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Jinlun Group Recent Developments/Updates

9.12.6 Jinlun Group Competitive Strengths & Weaknesses

## 9.13 Maduratex

9.13.1 Maduratex Details

9.13.2 Maduratex Major Business

9.13.3 Maduratex Tire Cord Fabrics Product and Services

9.13.4 Maduratex Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Maduratex Recent Developments/Updates

9.13.6 Maduratex Competitive Strengths & Weaknesses

## 9.14 Far Eastern Group

9.14.1 Far Eastern Group Details

9.14.2 Far Eastern Group Major Business

9.14.3 Far Eastern Group Tire Cord Fabrics Product and Services

9.14.4 Far Eastern Group Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Far Eastern Group Recent Developments/Updates

9.14.6 Far Eastern Group Competitive Strengths & Weaknesses

## 9.15 Shifeng

9.15.1 Shifeng Details

9.15.2 Shifeng Major Business

9.15.3 Shifeng Tire Cord Fabrics Product and Services

9.15.4 Shifeng Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Shifeng Recent Developments/Updates

- 9.15.6 Shifeng Competitive Strengths & Weaknesses
- 9.16 Firestone
  - 9.16.1 Firestone Details
  - 9.16.2 Firestone Major Business
  - 9.16.3 Firestone Tire Cord Fabrics Product and Services
  - 9.16.4 Firestone Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.16.5 Firestone Recent Developments/Updates
  - 9.16.6 Firestone Competitive Strengths & Weaknesses
- 9.17 Dikai
  - 9.17.1 Dikai Details
  - 9.17.2 Dikai Major Business
  - 9.17.3 Dikai Tire Cord Fabrics Product and Services
  - 9.17.4 Dikai Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.17.5 Dikai Recent Developments/Updates
  - 9.17.6 Dikai Competitive Strengths & Weaknesses
- 9.18 Helon Polytex
  - 9.18.1 Helon Polytex Details
  - 9.18.2 Helon Polytex Major Business
  - 9.18.3 Helon Polytex Tire Cord Fabrics Product and Services
  - 9.18.4 Helon Polytex Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.18.5 Helon Polytex Recent Developments/Updates
  - 9.18.6 Helon Polytex Competitive Strengths & Weaknesses
- 9.19 Taiji
  - 9.19.1 Taiji Details
  - 9.19.2 Taiji Major Business
  - 9.19.3 Taiji Tire Cord Fabrics Product and Services
  - 9.19.4 Taiji Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.19.5 Taiji Recent Developments/Updates
  - 9.19.6 Taiji Competitive Strengths & Weaknesses
- 9.20 Cordenka
  - 9.20.1 Cordenka Details
  - 9.20.2 Cordenka Major Business
  - 9.20.3 Cordenka Tire Cord Fabrics Product and Services
  - 9.20.4 Cordenka Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.20.5 Cordenka Recent Developments/Updates
- 9.20.6 Cordenka Competitive Strengths & Weaknesses
- 9.21 Bestory
  - 9.21.1 Bestory Details
  - 9.21.2 Bestory Major Business
  - 9.21.3 Bestory Tire Cord Fabrics Product and Services
  - 9.21.4 Bestory Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.21.5 Bestory Recent Developments/Updates
  - 9.21.6 Bestory Competitive Strengths & Weaknesses
- 9.22 Unifull
  - 9.22.1 Unifull Details
  - 9.22.2 Unifull Major Business
  - 9.22.3 Unifull Tire Cord Fabrics Product and Services
  - 9.22.4 Unifull Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.22.5 Unifull Recent Developments/Updates
  - 9.22.6 Unifull Competitive Strengths & Weaknesses
- 9.23 DONGPING JINMA
  - 9.23.1 DONGPING JINMA Details
  - 9.23.2 DONGPING JINMA Major Business
  - 9.23.3 DONGPING JINMA Tire Cord Fabrics Product and Services
  - 9.23.4 DONGPING JINMA Tire Cord Fabrics Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.23.5 DONGPING JINMA Recent Developments/Updates
  - 9.23.6 DONGPING JINMA Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 Tire Cord Fabrics Industry Chain
- 10.2 Tire Cord Fabrics Upstream Analysis
  - 10.2.1 Tire Cord Fabrics Core Raw Materials
  - 10.2.2 Main Manufacturers of Tire Cord Fabrics Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Tire Cord Fabrics Production Mode
- 10.6 Tire Cord Fabrics Procurement Model
- 10.7 Tire Cord Fabrics Industry Sales Model and Sales Channels
  - 10.7.1 Tire Cord Fabrics Sales Model

10.7.2 Tire Cord Fabrics Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. World Tire Cord Fabrics Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Tire Cord Fabrics Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Tire Cord Fabrics Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Tire Cord Fabrics Production Value Market Share by Region (2021-2026)
- Table 5. World Tire Cord Fabrics Production Value Market Share by Region (2027-2032)
- Table 6. World Tire Cord Fabrics Production by Region (2021-2026) & (K Tons)
- Table 7. World Tire Cord Fabrics Production by Region (2027-2032) & (K Tons)
- Table 8. World Tire Cord Fabrics Production Market Share by Region (2021-2026)
- Table 9. World Tire Cord Fabrics Production Market Share by Region (2027-2032)
- Table 10. World Tire Cord Fabrics Average Price by Region (2021-2026) & (US\$/Ton)
- Table 11. World Tire Cord Fabrics Average Price by Region (2027-2032) & (US\$/Ton)
- Table 12. Tire Cord Fabrics Major Market Trends
- Table 13. World Tire Cord Fabrics Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Tons)
- Table 14. World Tire Cord Fabrics Consumption by Region (2021-2026) & (K Tons)
- Table 15. World Tire Cord Fabrics Consumption Forecast by Region (2027-2032) & (K Tons)
- Table 16. World Tire Cord Fabrics Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Tire Cord Fabrics Producers in 2025
- Table 18. World Tire Cord Fabrics Production by Manufacturer (2021-2026) & (K Tons)
- Table 19. Production Market Share of Key Tire Cord Fabrics Producers in 2025
- Table 20. World Tire Cord Fabrics Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 21. Global Tire Cord Fabrics Company Evaluation Quadrant
- Table 22. World Tire Cord Fabrics Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Tire Cord Fabrics Production Site of Key Manufacturer
- Table 24. Tire Cord Fabrics Market: Company Product Type Footprint
- Table 25. Tire Cord Fabrics Market: Company Product Application Footprint

Table 26. Tire Cord Fabrics Competitive Factors

Table 27. Tire Cord Fabrics New Entrant and Capacity Expansion Plans

Table 28. Tire Cord Fabrics Mergers & Acquisitions Activity

Table 29. United States VS China Tire Cord Fabrics Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Tire Cord Fabrics Production Comparison, (2021 & 2025 & 2032) & (K Tons)

Table 31. United States VS China Tire Cord Fabrics Consumption Comparison, (2021 & 2025 & 2032) & (K Tons)

Table 32. United States Based Tire Cord Fabrics Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Tire Cord Fabrics Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Tire Cord Fabrics Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Tire Cord Fabrics Production (2021-2026) & (K Tons)

Table 36. United States Based Manufacturers Tire Cord Fabrics Production Market Share (2021-2026)

Table 37. China Based Tire Cord Fabrics Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Tire Cord Fabrics Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Tire Cord Fabrics Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Tire Cord Fabrics Production, (2021-2026) & (K Tons)

Table 41. China Based Manufacturers Tire Cord Fabrics Production Market Share (2021-2026)

Table 42. Rest of World Based Tire Cord Fabrics Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Tire Cord Fabrics Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Tire Cord Fabrics Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Tire Cord Fabrics Production, (2021-2026) & (K Tons)

Table 46. Rest of World Based Manufacturers Tire Cord Fabrics Production Market Share (2021-2026)

Table 47. World Tire Cord Fabrics Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Tire Cord Fabrics Production by Type (2021-2026) & (K Tons)

Table 49. World Tire Cord Fabrics Production by Type (2027-2032) & (K Tons)

Table 50. World Tire Cord Fabrics Production Value by Type (2021-2026) & (USD Million)

Table 51. World Tire Cord Fabrics Production Value by Type (2027-2032) & (USD Million)

Table 52. World Tire Cord Fabrics Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Tire Cord Fabrics Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Tire Cord Fabrics Production Value by Technical Performance Level, (USD Million), 2021 & 2025 & 2032

Table 55. World Tire Cord Fabrics Production by Technical Performance Level (2021-2026) & (K Tons)

Table 56. World Tire Cord Fabrics Production by Technical Performance Level (2027-2032) & (K Tons)

Table 57. World Tire Cord Fabrics Production Value by Technical Performance Level (2021-2026) & (USD Million)

Table 58. World Tire Cord Fabrics Production Value by Technical Performance Level (2027-2032) & (USD Million)

Table 59. World Tire Cord Fabrics Average Price by Technical Performance Level (2021-2026) & (US\$/Ton)

Table 60. World Tire Cord Fabrics Average Price by Technical Performance Level (2027-2032) & (US\$/Ton)

Table 61. World Tire Cord Fabrics Production Value by End-User, (USD Million), 2021 & 2025 & 2032

Table 62. World Tire Cord Fabrics Production by End-User (2021-2026) & (K Tons)

Table 63. World Tire Cord Fabrics Production by End-User (2027-2032) & (K Tons)

Table 64. World Tire Cord Fabrics Production Value by End-User (2021-2026) & (USD Million)

Table 65. World Tire Cord Fabrics Production Value by End-User (2027-2032) & (USD Million)

Table 66. World Tire Cord Fabrics Average Price by End-User (2021-2026) & (US\$/Ton)

Table 67. World Tire Cord Fabrics Average Price by End-User (2027-2032) & (US\$/Ton)

Table 68. World Tire Cord Fabrics Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Tire Cord Fabrics Production by Application (2021-2026) & (K Tons)

- Table 70. World Tire Cord Fabrics Production by Application (2027-2032) & (K Tons)
- Table 71. World Tire Cord Fabrics Production Value by Application (2021-2026) & (USD Million)
- Table 72. World Tire Cord Fabrics Production Value by Application (2027-2032) & (USD Million)
- Table 73. World Tire Cord Fabrics Average Price by Application (2021-2026) & (US\$/Ton)
- Table 74. World Tire Cord Fabrics Average Price by Application (2027-2032) & (US\$/Ton)
- Table 75. Hyosung Basic Information, Manufacturing Base and Competitors
- Table 76. Hyosung Major Business
- Table 77. Hyosung Tire Cord Fabrics Product and Services
- Table 78. Hyosung Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 79. Hyosung Recent Developments/Updates
- Table 80. Hyosung Competitive Strengths & Weaknesses
- Table 81. Junma Basic Information, Manufacturing Base and Competitors
- Table 82. Junma Major Business
- Table 83. Junma Tire Cord Fabrics Product and Services
- Table 84. Junma Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Junma Recent Developments/Updates
- Table 86. Junma Competitive Strengths & Weaknesses
- Table 87. Indorama Ventures Basic Information, Manufacturing Base and Competitors
- Table 88. Indorama Ventures Major Business
- Table 89. Indorama Ventures Tire Cord Fabrics Product and Services
- Table 90. Indorama Ventures Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Indorama Ventures Recent Developments/Updates
- Table 92. Indorama Ventures Competitive Strengths & Weaknesses
- Table 93. Kordsa Global Basic Information, Manufacturing Base and Competitors
- Table 94. Kordsa Global Major Business
- Table 95. Kordsa Global Tire Cord Fabrics Product and Services
- Table 96. Kordsa Global Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Kordsa Global Recent Developments/Updates
- Table 98. Kordsa Global Competitive Strengths & Weaknesses
- Table 99. Kolon Industries Basic Information, Manufacturing Base and Competitors
- Table 100. Kolon Industries Major Business

- Table 101. Kolon Industries Tire Cord Fabrics Product and Services
- Table 102. Kolon Industries Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Kolon Industries Recent Developments/Updates
- Table 104. Kolon Industries Competitive Strengths & Weaknesses
- Table 105. Shenma Basic Information, Manufacturing Base and Competitors
- Table 106. Shenma Major Business
- Table 107. Shenma Tire Cord Fabrics Product and Services
- Table 108. Shenma Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Shenma Recent Developments/Updates
- Table 110. Shenma Competitive Strengths & Weaknesses
- Table 111. SRF Ltd Basic Information, Manufacturing Base and Competitors
- Table 112. SRF Ltd Major Business
- Table 113. SRF Ltd Tire Cord Fabrics Product and Services
- Table 114. SRF Ltd Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. SRF Ltd Recent Developments/Updates
- Table 116. SRF Ltd Competitive Strengths & Weaknesses
- Table 117. Haiyang Chemical Basic Information, Manufacturing Base and Competitors
- Table 118. Haiyang Chemical Major Business
- Table 119. Haiyang Chemical Tire Cord Fabrics Product and Services
- Table 120. Haiyang Chemical Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Haiyang Chemical Recent Developments/Updates
- Table 122. Haiyang Chemical Competitive Strengths & Weaknesses
- Table 123. Hailide Basic Information, Manufacturing Base and Competitors
- Table 124. Hailide Major Business
- Table 125. Hailide Tire Cord Fabrics Product and Services
- Table 126. Hailide Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Hailide Recent Developments/Updates
- Table 128. Hailide Competitive Strengths & Weaknesses
- Table 129. Teijin Basic Information, Manufacturing Base and Competitors
- Table 130. Teijin Major Business
- Table 131. Teijin Tire Cord Fabrics Product and Services
- Table 132. Teijin Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Teijin Recent Developments/Updates

- Table 134. Teijin Competitive Strengths & Weaknesses
- Table 135. Century Enka Basic Information, Manufacturing Base and Competitors
- Table 136. Century Enka Major Business
- Table 137. Century Enka Tire Cord Fabrics Product and Services
- Table 138. Century Enka Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Century Enka Recent Developments/Updates
- Table 140. Century Enka Competitive Strengths & Weaknesses
- Table 141. Jinlun Group Basic Information, Manufacturing Base and Competitors
- Table 142. Jinlun Group Major Business
- Table 143. Jinlun Group Tire Cord Fabrics Product and Services
- Table 144. Jinlun Group Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Jinlun Group Recent Developments/Updates
- Table 146. Jinlun Group Competitive Strengths & Weaknesses
- Table 147. Maduratex Basic Information, Manufacturing Base and Competitors
- Table 148. Maduratex Major Business
- Table 149. Maduratex Tire Cord Fabrics Product and Services
- Table 150. Maduratex Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Maduratex Recent Developments/Updates
- Table 152. Maduratex Competitive Strengths & Weaknesses
- Table 153. Far Eastern Group Basic Information, Manufacturing Base and Competitors
- Table 154. Far Eastern Group Major Business
- Table 155. Far Eastern Group Tire Cord Fabrics Product and Services
- Table 156. Far Eastern Group Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. Far Eastern Group Recent Developments/Updates
- Table 158. Far Eastern Group Competitive Strengths & Weaknesses
- Table 159. Shifeng Basic Information, Manufacturing Base and Competitors
- Table 160. Shifeng Major Business
- Table 161. Shifeng Tire Cord Fabrics Product and Services
- Table 162. Shifeng Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. Shifeng Recent Developments/Updates
- Table 164. Shifeng Competitive Strengths & Weaknesses
- Table 165. Firestone Basic Information, Manufacturing Base and Competitors
- Table 166. Firestone Major Business
- Table 167. Firestone Tire Cord Fabrics Product and Services

- Table 168. Firestone Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. Firestone Recent Developments/Updates
- Table 170. Firestone Competitive Strengths & Weaknesses
- Table 171. Dikai Basic Information, Manufacturing Base and Competitors
- Table 172. Dikai Major Business
- Table 173. Dikai Tire Cord Fabrics Product and Services
- Table 174. Dikai Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. Dikai Recent Developments/Updates
- Table 176. Dikai Competitive Strengths & Weaknesses
- Table 177. Helon Polytex Basic Information, Manufacturing Base and Competitors
- Table 178. Helon Polytex Major Business
- Table 179. Helon Polytex Tire Cord Fabrics Product and Services
- Table 180. Helon Polytex Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Helon Polytex Recent Developments/Updates
- Table 182. Helon Polytex Competitive Strengths & Weaknesses
- Table 183. Taiji Basic Information, Manufacturing Base and Competitors
- Table 184. Taiji Major Business
- Table 185. Taiji Tire Cord Fabrics Product and Services
- Table 186. Taiji Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 187. Taiji Recent Developments/Updates
- Table 188. Taiji Competitive Strengths & Weaknesses
- Table 189. Cordenka Basic Information, Manufacturing Base and Competitors
- Table 190. Cordenka Major Business
- Table 191. Cordenka Tire Cord Fabrics Product and Services
- Table 192. Cordenka Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 193. Cordenka Recent Developments/Updates
- Table 194. Cordenka Competitive Strengths & Weaknesses
- Table 195. Bestory Basic Information, Manufacturing Base and Competitors
- Table 196. Bestory Major Business
- Table 197. Bestory Tire Cord Fabrics Product and Services
- Table 198. Bestory Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 199. Bestory Recent Developments/Updates
- Table 200. Bestory Competitive Strengths & Weaknesses

- Table 201. Unifull Basic Information, Manufacturing Base and Competitors
- Table 202. Unifull Major Business
- Table 203. Unifull Tire Cord Fabrics Product and Services
- Table 204. Unifull Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 205. Unifull Recent Developments/Updates
- Table 206. Unifull Competitive Strengths & Weaknesses
- Table 207. DONGPING JINMA Basic Information, Manufacturing Base and Competitors
- Table 208. DONGPING JINMA Major Business
- Table 209. DONGPING JINMA Tire Cord Fabrics Product and Services
- Table 210. DONGPING JINMA Tire Cord Fabrics Production (K Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 211. DONGPING JINMA Recent Developments/Updates
- Table 212. DONGPING JINMA Competitive Strengths & Weaknesses
- Table 213. Global Key Players of Tire Cord Fabrics Upstream (Raw Materials)
- Table 214. Global Tire Cord Fabrics Typical Customers
- Table 215. Tire Cord Fabrics Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Tire Cord Fabrics Picture

Figure 2. World Tire Cord Fabrics Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Tire Cord Fabrics Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 5. World Tire Cord Fabrics Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Tire Cord Fabrics Production Value Market Share by Region (2021-2032)

Figure 7. World Tire Cord Fabrics Production Market Share by Region (2021-2032)

Figure 8. India Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 9. South Korea Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 10. China Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 11. China Taiwan Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 12. Japan Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 13. Turkey Tire Cord Fabrics Production (2021-2032) & (K Tons)

Figure 14. Tire Cord Fabrics Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 17. World Tire Cord Fabrics Consumption Market Share by Region (2021-2032)

Figure 18. United States Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 19. China Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 20. Europe Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 21. Japan Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 22. South Korea Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 23. ASEAN Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 24. India Tire Cord Fabrics Consumption (2021-2032) & (K Tons)

Figure 25. Producer Shipments of Tire Cord Fabrics by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Tire Cord Fabrics Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Tire Cord Fabrics Markets in 2025

Figure 28. United States VS China: Tire Cord Fabrics Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Tire Cord Fabrics Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Tire Cord Fabrics Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Tire Cord Fabrics Production Market Share 2025

Figure 32. China Based Manufacturers Tire Cord Fabrics Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Tire Cord Fabrics Production Market Share 2025

Figure 34. World Tire Cord Fabrics Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Tire Cord Fabrics Production Value Market Share by Type in 2025

Figure 36. Steel Tire Cord

Figure 37. Nylon Tire Cord

Figure 38. Polyester Tire Cord

Figure 39. Rayon Tire Cord

Figure 40. Hybrid Tire Cord

Figure 41. Aramid

Figure 42. World Tire Cord Fabrics Production Market Share by Type (2021-2032)

Figure 43. World Tire Cord Fabrics Production Value Market Share by Type (2021-2032)

Figure 44. World Tire Cord Fabrics Average Price by Type (2021-2032) & (US\$/Ton)

Figure 45. World Tire Cord Fabrics Production Value by Technical Performance Level, (USD Million), 2021 & 2025 & 2032

Figure 46. World Tire Cord Fabrics Production Value Market Share by Technical Performance Level in 2025

Figure 47. Standard Tire Cord

Figure 48. HMLS Tire Cord

Figure 49. Others

Figure 50. World Tire Cord Fabrics Production Market Share by Technical Performance Level (2021-2032)

Figure 51. World Tire Cord Fabrics Production Value Market Share by Technical Performance Level (2021-2032)

Figure 52. World Tire Cord Fabrics Average Price by Technical Performance Level (2021-2032) & (US\$/Ton)

Figure 53. World Tire Cord Fabrics Production Value by End-User, (USD Million), 2021 & 2025 & 2032

Figure 54. World Tire Cord Fabrics Production Value Market Share by End-User in 2025

Figure 55. Auto Tire Cord

Figure 56. OTR Tire Cord

Figure 57. Others

Figure 58. World Tire Cord Fabrics Production Market Share by End-User (2021-2032)

Figure 59. World Tire Cord Fabrics Production Value Market Share by End-User (2021-2032)

Figure 60. World Tire Cord Fabrics Average Price by End-User (2021-2032) & (US\$/Ton)

Figure 61. World Tire Cord Fabrics Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 62. World Tire Cord Fabrics Production Value Market Share by Application in 2025

Figure 63. Radial Tire

Figure 64. Bias Tire

Figure 65. World Tire Cord Fabrics Production Market Share by Application (2021-2032)

Figure 66. World Tire Cord Fabrics Production Value Market Share by Application (2021-2032)

Figure 67. World Tire Cord Fabrics Average Price by Application (2021-2032) & (US\$/Ton)

Figure 68. Tire Cord Fabrics Industry Chain

Figure 69. Tire Cord Fabrics Procurement Model

Figure 70. Tire Cord Fabrics Sales Model

Figure 71. Tire Cord Fabrics Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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