

Global Tire Cord Fabrics(Including Steel Cord) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Tire Cord Fabrics(Including Steel Cord) market size was valued at US\$ 13856 million in 2025 and is forecast to a readjusted size of US\$ 19568 million by 2032 with a CAGR of 5.1% during review period.

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.

Report Scope

This report is a detailed and comprehensive analysis for global Tire Cord Fabrics(Including Steel Cord) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Tire Cord Fabrics(Including Steel Cord) market size and forecasts, in consumption value (\$ Million), sales quantity (K Tons), and average selling prices (US\$/Ton), 2021-2032

Global Tire Cord Fabrics(Including Steel Cord) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Tons), and average selling prices (US\$/Ton), 2021-2032

Global Tire Cord Fabrics(Including Steel Cord) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Tons), and average selling prices (US\$/Ton), 2021-2032

Global Tire Cord Fabrics(Including Steel Cord) market shares of main players, shipments in revenue (\$ Million), sales quantity (K Tons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Tire Cord Fabrics(Including Steel Cord)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Tire Cord Fabrics(Including Steel

Cord) market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Tire Cord Fabrics(Including Steel Cord) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Steel Tire Cord

Nylon Tire Cord

Polyester Tire Cord

Rayon Tire Cord

Hybrid Tire Cord

Aramid

Market segment by Technical Performance Level

Standard Tire Cord

HMLS Tire Cord

Others

Market segment by End-User

Auto Tire Cord

OTR Tire Cord

Others

Market segment by Application

Radial Tire

Bias Tire

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Tire Cord Fabrics(Including Steel Cord) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Tire Cord Fabrics(Including Steel Cord), with price, sales quantity, revenue, and global market share of Tire Cord Fabrics(Including Steel Cord) from 2021 to 2026.

Chapter 3, the Tire Cord Fabrics(Including Steel Cord) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Tire Cord Fabrics(Including Steel Cord) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Tire Cord Fabrics(Including Steel Cord) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Tire Cord Fabrics(Including Steel Cord).

Chapter 14 and 15, to describe Tire Cord Fabrics(Including Steel Cord) sales channel, distributors, customers, research findings and conclusion.

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