

# Global Tire Cord Fabrics Market Growth 2026-2032

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## Abstracts

The global Tire Cord Fabrics market size is predicted to grow from US\$ 13173 million in 2025 to US\$ 18943 million in 2032; it is expected to grow at a CAGR of 5.4% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Tire Cord Fabrics Industry Forecast" looks at past sales and reviews total world Tire Cord Fabrics sales in 2025, providing a comprehensive analysis by region and market sector of projected Tire Cord Fabrics sales for 2026 through 2032. With Tire Cord Fabrics sales broken down by

region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Tire Cord Fabrics industry.

This Insight Report provides a comprehensive analysis of the global Tire Cord Fabrics landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Tire Cord Fabrics portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Tire Cord Fabrics market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Tire Cord Fabrics and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Tire Cord Fabrics.

This report presents a comprehensive overview, market shares, and growth opportunities of Tire Cord Fabrics market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Steel Tire Cord

Nylon Tire Cord

Polyester Tire Cord

Rayon Tire Cord

Hybrid Tire Cord

#### Segmentation by Technical Performance Level:

Standard Tire Cord

HMLS Tire Cord

Others

Segmentation by End-User:

Auto Tire Cord

OTR Tire Cord

Others

Segmentation by Application:

Radial Tire

Bias Tire

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Tire Cord Fabrics market?

What factors are driving Tire Cord Fabrics market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Tire Cord Fabrics market opportunities vary by end market size?

How does Tire Cord Fabrics break out by Type, by Application?

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