

# Steel Tire Cord Market Outlook 2026-2034: Market Share, and Growth Analysis By Type (Brass Coated, Zinc Coated, Copper Coated, Others), By Application (Passenger Vehicle Tires, Commercial Vehicle Tires, Two-Wheeler Tires, Aircraft Tires, Industrial Tires)

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## Abstracts

The Steel Tire Cord Market is valued at USD 5.1 billion in 2025 and is projected to grow at a CAGR of 3.1% to reach USD 6.71 billion by 2034.

### Steel Tire Cord Market

The steel tire cord market supplies high-tensile, brass-plated steel filaments and cables that reinforce carcass and belt packages in passenger car, light truck, commercial vehicle, two-wheeler, OTR, and specialty tires. These cords deliver hoop strength, dimensional stability, and fatigue durability under cyclic loads, temperature swings, and corrosive environments - directly affecting uniformity, rolling resistance, and service life. Product innovation focuses on cleaner melts and micro-alloying to lift strength-to-diameter ratios; ultra-consistent drawing and twisting to control cast/helix; plating chemistries that stabilize rubber-brass adhesion over aging; and cable designs that balance flexibility with splice integrity. Process investments emphasize inline surface inspection, laser/eddy-current monitoring, automated spooling at high speeds, and genealogy systems that tie coil attributes to tire plant quality metrics. Demand tracks global tire production and replacement cycles, with mix shifts toward EV-ready, high-load, and high-speed tires that tighten dimensional and adhesion requirements. Sustainability programs target energy-efficient drawing, closed-loop water and plating baths, zinc stewardship, and scrap recovery. Competitive dynamics span integrated steelmakers with rod-to-cord control, specialized cord producers, and regional suppliers close to tire clusters. Differentiation hinges on melt cleanliness, plating bath stability,

winding precision at automated tire builders, and proven adhesion after heat/humidity aging. Challenges include input-cost volatility for wire rod and zinc, maintaining cross-plant uniformity, qualifying to proprietary OEM specs, and logistics resilience. As tire manufacturers automate and consolidate platforms, preferred suppliers pair metallurgy excellence with SPC-driven process capability, rapid changeovers, and co-engineering on adhesion, splice performance, and fatigue life.

## Steel Tire Cord Market Key Insights

Tire mix is the demand signal. Growth in high-load and EV-ready tires raises tensile and adhesion targets; cords must support stiffer sidewalls and compact bead/belt geometries without compromising mountability.

Metallurgy + cleanliness win fatigue. Low-inclusion rod, controlled pearlite, and fine drawing schedules deliver high strength with ductility; residual stress control improves bend fatigue at splices and terminations.

Adhesion chemistry is strategic. Brass composition, thickness, and intermetallic growth control stabilize bonding through cure and aging; bath analytics and replenishment models reduce drift and field variability.

Dimensional precision under automation. Tight diameter/ovality, exact twist, and low residual torsion cut breaks and stoppages on high-speed tire-building machines and ensure uniformity.

Cable architecture by segment. 1?N, 2+7, 3?N, and compact constructions tune flexibility vs. hoop strength for PCR, TBR, and OTR; splice technology and calendaring behavior are critical to scrap rates.

Inline inspection and traceability. Eddy current, laser gauges, and vision map defects to coil IDs; SPC dashboards and digital certificates accelerate audits and PPAP approvals.

Sustainability and compliance. Energy-efficient drawing, closed-loop plating, and zinc management support OEM ESG goals; scrap return and recycling programs improve circularity.

Cost and yield levers. Die life optimization, wire-break analytics, and plating yield control offset commodity volatility; standardized spool formats simplify

logistics and handling.

Proximity to tire plants matters. Regional cord supply shortens lead times and reduces damage risk; VMI and consignment stabilize uptime in highly automated factories.

Co-engineering secures awards. Joint trials with tire makers on adhesion promoters, apex compounds, and cure profiles deliver measurable uniformity gains and lifecycle durability.

## Steel Tire Cord Market Regional Analysis

### North America

Replacement demand and regional vehicle assembly drive steady consumption across PCR and TBR. Tire makers emphasize uniformity, adhesion after aging, and robust spool logistics for automated lines. Suppliers close to plants with strong PPAP documentation, quick technical support, and VMI programs gain share. Sustainability reporting and safety audits increasingly influence vendor selection.

### Europe

Strict quality regimes and growing EV adoption elevate requirements for high-tensile, low-ovality cords with stable plating chemistry. OEM-specific specs for high-speed and low-rolling-resistance tires demand rigorous SPC and documented genealogy. Regional suppliers benefit from proximity and flexible scheduling; environmental stewardship and zinc management are procurement gates.

### Asia-Pacific

The largest manufacturing base spans value to premium segments. Global and regional producers compete on scale, cost, and qualification speed. China and Southeast Asia drive volume in PCR/TBR; Japan and Korea prioritize high-performance uniformity and plating stability. Localized rod supply, rapid changeovers, and field service teams are decisive differentiators.

### Middle East & Africa

Emerging tire capacity and distribution hubs require reliable cords with corrosion resistance and heat tolerance for hot, saline, and dusty environments. Free-zone logistics and service partnerships reduce lead times. Buyers focus on consistent adhesion, coil integrity, and training to minimize scrap in newer, automated facilities.

### South & Central America

Regional plants serving domestic and export markets prioritize predictable delivery, coil handling quality, and responsive support during line upsets. Budget sensitivity favors efficient drawing and plating operations with strong yield control. Vendors offering consignment stock, rapid replacement for breakages, and on-site training on calendaring and splice practices gain traction.

### Steel Tire Cord Market Segmentation

#### By Type

Brass Coated

Zinc Coated

Copper Coated

Others

#### By Application

Passenger Vehicle Tires

Commercial Vehicle Tires

Two-Wheeler Tires

Aircraft Tires

Industrial Tires

## Key Market players

Bekaert, Kiswire, Hyosung Steelcord, Jiangsu Xingda, Shougang Concord Century, Tokusen Kogyo, Bridgestone Metalpha, Siam Steel Cord, Hyundai BNG Steel, ArcelorMittal, Henan Hengxing, Shagang Wire, TrefilArbed, Kobe Steel, Sumitomo Electric

## Steel Tire Cord Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

## Steel Tire Cord Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

## Countries Covered

### North America — Steel Tire Cord market data and outlook to 2034

United States

Canada

Mexico

## Europe — Steel Tire Cord market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

## Asia-Pacific — Steel Tire Cord market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

## Middle East and Africa — Steel Tire Cord market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

### South and Central America — Steel Tire Cord market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

### Research Methodology

This study combines primary inputs from industry experts across the Steel Tire Cord value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the Steel Tire Cord industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Steel Tire Cord Market Report

Global Steel Tire Cord market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Steel Tire Cord trade, costs, and supply chains

Steel Tire Cord market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Steel Tire Cord market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Steel Tire Cord market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Steel Tire Cord supply chain analysis

Steel Tire Cord trade analysis, Steel Tire Cord market price analysis, and Steel Tire Cord supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and

products

Latest Steel Tire Cord market news and developments

### Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

\* The updated report will be delivered within 3 working days

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