

# Global and China Tire Industry Report, 2014-2015

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## Abstracts

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.

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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