

# China Tire Retreading Industry - Overview and Forecast to 2017

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## Abstracts

In 2012, the output volume of radial tires in China reached over 460 million and the volume of scrap tires exceeded 200 million. The output volume of retreaded tires in 2012 was 18 million, increasing by more than 10% over 2011 and the market scale exceeded CNY 6 billion. However, the market concentration rate of China tire retreading industry is rather low. According to incomplete statistics, although there are about 500 regular tire retreading enterprises and a number of small workshops in China, retreading over 30 million tires annually, less than 20 of them had an annual production of more than 100,000 units in China in 2012.

With the yearly increase of automobile reserves in China, the volume of scrap tires generated has kept growing by over 10% annually and scrap tires have become a major source of solid waste pollution. There are many ways in recycling tires and retreading is one of the important ways. Compared with new tires, retreaded tires consume less resource and are sold at lower prices. However, the overall development of China tire retreading industry lags behind that of new tire industry due to many special reasons.

Firstly, Chinese consumers usually have misconceptions about the tire retreading industry. Retreaded tires are often considered to be unsafe and produced by small workshops. Besides, some Chinese media constantly vilify tire retreading industry as "illegal business" and "highly polluting". As a result, many vehicle owners refuse to use retreaded tires.

Secondly, China still lacks corresponding regulations or policies in charge of the pollution and recycling of scrap tires. On one hand, scrap tires are burned and discarded in large amounts, which not only severely pollutes the environment, but is also a waste of resources; on the other hand, it causes a serious shortage of raw

materials for enterprises processing and recycling scrap tires in China.

Finally, because of misconceptions, many drivers in China tend to keep using the tires till the tires are scrapped instead of retreading or recycling the tires according to wear limit signs, which not only leads to unsafe driving, but also leaves tires little utilization value for retreading due to excessive wear.

Due to the above factors, China tire retreading industry has been developing very slowly in the past decade. In 2012, scrap tire retreading rate in China was less than 7%, far lower than that in developed countries.

Along with China's economic development, China automobile market develops rapidly and China has become the largest automobile producer and consumer in the world. Automobile reserves in China have been rising as well, reaching about 120 million and increasing by 13.4% in 2012. Private cars have gradually transformed from "luxury" to "daily commodities", and many car owners now prefer "practical cars" to "new cars", which is conducive to the development of tire retreading industry. As shown by the survey conducted by CRI, car owners in China became more willing to accept retreaded tires from 2005 to 2012.

As highway networks in China are gradually improved in recently years, highway transportation has become the primary means of transportation in China. The development of China highway transportation industry also drives the usage volume of tires, which provides favorable conditions for the development of tire retreading industry.

In recent years, the Chinese government has significantly increased investment in such fixed assets as highway, railway, metro, etc. to promote economic growth. In 2012, investment in fixed assets (excluding rural households) in China reached CNY 36.4835 trillion, increasing by 20.6% YOY, much higher than the GDP growth rate. The rapid growth of fixed assets investment also continuously raises the demand for and reserves of OTR tires. CRI estimates that China needs over 5 million OTR tires annually in recently years, with the annual OTR tire market scale being over USD 1 billion. In China, a retreaded OTR tire has the service life about 70% that of a new tire, but the price only 40%-50% that of a new one. The OTR tire retreading market capacity of China is expected to be over USD 100 million annually, which indicates promising development prospects.

In 2012, the Chinese government issued Access Conditions of the Tire Retreading Industry and Access Conditions of Scrap Tire Utilization Industry, which regulates China

tire retreading industry to some degree and provided policy support for the development of the industry.

China automobile market is expected to maintain the world's leading growth rate in the next few years and automobile reserves will continue to rise as well, which will bring an increasingly higher volume of scrap tires in China, providing sufficient raw materials for China tire retreading industry. On the whole, China tire retreading industry possesses great prospects. There are many opportunities for tire retreading enterprises and tire retreading equipment enterprises to invest. Tire manufacturers can also enter the tire retreading industry at a proper time.

Readers can obtain the following information or more through this report:

Development Process of China Tire Retreading Industry

Economy and Policy Environment Faced by Tire Retreading Industry

Demand and Supply Status of China Tire Retreading Industry

Market Competition Status of China Tire Retreading

Operation Status of Key Enterprises in China Tire Retreading Industry

Development Trend of China Tire Retreading Industry

Investment Opportunities in China Tire Retreading Industry

The Following Enterprises and People Are Recommended to Purchase This Report:

Tire Retreading Enterprises

Tire Manufacturers

Tire Retreading Equipment Manufacturers

Investors and Research Institutions Concerned About China Tire Retreading Industry

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