

Research Report on Tire Steel Cord Industry in China, 2018-2022

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Abstracts

DESCRIPTION

Steel cord is an important kind of framework material for the production of radial tires, which has an impact on maintaining the stability of tire shapes and sizes as well as meeting the properties of anti-fatigue, anti-impact and anti-deformation that are required by tires. In addition, it plays a critical role in the comfortability, noise, high-speed performance and longevity of tires.

The joining of WTO contributes to the rapid development of China's automobile industry and a growth of tire export, promoting the fast growth of the production volume of radial tires in China. In 2016, the production volume exceeded 600 million with a CAGR of over 8% during 2012 and 2016. China has been the world's biggest producer and exporter of automobile tires. The development of the radial tire industry also promotes the development of the steel cord industry in China.

CRI analyzes that China's steel cord has generally realized 100% of domestic manufacturing since 2005. By the end of 2017, there have been approximately 50 steel cord manufacturers in China. They are primarily located in Shandong, Jiangsu and Liaoning provinces, amongst which the production volume of steel cord in Shandong and Jiangsu accounts for over 60% of the national production volume. In addition, the steel cord industry in Zhejiang and Hubei provinces develops at a fast growth rate. Generally, China's steel cord industry experiences a high concentration rate, with the two biggest companies of Jiangsu Xingda and Bekaert occupying more than half of the market shares. The production volume of ten major steel cord manufacturers represents over 80% of the entire industry, demonstrating a highly concentrated industry.

According to CRI, the two biggest companies of Jiangsu Xingda and Bekaert possess high production capacity and production volume, far superior to other competitors. Due to the impact of capital, technologies, sales channels and such factors, China's steel cord industry exhibits a high level of concentration rate, with overcapacity of steel cord and fierce industry competition. Some steel cord plants are in process of establishment in Shaanxi, Shandong and Henan provinces and exiting plants are continuously expanding their production capacity. It is estimated that the market competition will become fiercer between 2018 and 2022 because of the lack of industry plans.

Analyzed by CRI, the production volume of steel cord exceeds 2 million tons in China in 2017, representing over 60% of the global production volume. The single use of steel cord limits its application only to the production of radial tires. The market distribution of steel cord is closely associated with the production of radial tires. From the perspective of the production status of radial tires in China, its production demonstrates a remarkable regional pattern, with the demand of East China accounting for over 70% of the total market.

China has been the net exporter of steel cord since 2006. The domestic steel cord can basically satisfy the market demand, with few exceptional models that demand high requirements being imported. China exports a certain amount of steel cord annually, the proportion of which accounts for approximately 5%-10% of the production volume of steel cord in China.

CRI predicts that the proportion of radial tires to commercial vehicle tires will continue to grow between 2018 and 2022, stimulating the export of radial tires in China. Accompanied by the continuous growth of China's production volume and reserve volume of vehicles, the domestic demand for radial tires is expected to grow. In the coming years, China will hold its position of the world's biggest producer and exporter of tires. The annual growth rate of the production volume of radial tires is projected to maintain over 8% in China, with an increasing demand for steel cord.

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

Economic and Policy Environment of China Steel Cord Industry

Analysis on Supply and Demand of China Steel Cord Industry

Analysis on Major Global Steel Cord Manufactures

Market Competition of Steel Cord

Trend of Production Cost and Sales Price of Steel Cord

Import and Export of Steel Cord in China

Driving Forces and Market Opportunities of China Steel Cord Industry,
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Risks and Challenges Faced by China Steel Cord Industry, 2018-2022

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