

# **Tire Industry Overview in China, 2011-2020 - Status Quo, Barriers, Top 5, Cost and Sales analysis**

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## **Abstracts**

### **Description**

China's output volume of tires broke through 280 million pieces and surpassed the U.S.A. to be the leading manufacturer and exporter in the world for the first time from 2006. However, it decreased by 17.33% YOY to 925.16 million compared to 2014 because of the economy slump in 2015.

The sales revenue of the tire industry continuously increased in China during these years. However, it experienced a decline with the decreasing output volume of tires in 2015. The total export value increased from USD 3.284 billion in 2005 to USD 13.846 billion in 2015 (tires for bicycles and motorcycles are not included) with the CAGR of 15.48%. The market share of radial tires accounted for over 80% in total export value, transferring from focusing on the export of bias tires to radial tires, which increased the added value of exported tire products. Due to the low average price, tires exported from China were confronted with many trade barriers including anti-dumping.

According to CRI, the production capacity of low and mid end tires is surplus because low barriers to entry and investment costs and lack of market information lead to universal blind investments. At present, the concentration rate of the tire industry is low, and small-scale enterprises are numerous. According to CRI, there were more than 500 tire manufacturing enterprises with an average annual output volume of less than 2 million by the end of 2015. According to CRI, the aggregate market share of top 5 tire manufacturers was less than 15%, which led to a fierce competition in 2015. Due to the high growth rate of the tire industry in China in recent years, all global leading manufacturers enter China. Most market shares of whole vehicle matching tires are occupied by foreign-owned enterprises.

Major raw materials of tires include natural rubber, synthetic rubber, steel cord material, carbon black and rubber adjuvant. The costs of raw materials accounted for about 70% of the total, which is a key factor influencing the production and operation of the tire industry.

In 2013, the State Council of China issued Guidance on Resolving the Overcapacity Problems, and provincial government of Shandong issued On the Implementation of Resolving the Overcapacity Problems (No. 41?2013?of the State Council), then the tire industry was included in industries with overcapacity in Shandong Province. According to CRI, the implementation of the fore-mentioned industry policies raise the barriers to entry in the industry to a certain extent. However, it needs a relatively long term to change the competition pattern of the tire industry in China.

The sales volume of automobiles was 24.598 million, increasing by 4.7% YOY in China in 2015. Meanwhile, the sales volume of passenger vehicles reached 21.1463 million, increasing by 7.3% YOY. The automobile industry enters a stage of stable development, which leads to a slump growth rate of the demand for tires. The large vehicle reserve determines the large demand for replacement tires in China. At the end of 2015, the private vehicle reserve volume reached 172.28 million and the number is still increasing. CRI analyses that the replacement tire market will be the major tire consumption subject in the future. China has many cost advantages due to the perfect industry chain of tire manufacturing. Therefore, tire products exported from China will still be competitive in the international market and export will remain one of the major driving forces in the tire manufacturing industry in China.

Through this report, the readers can acquire the following information:

Definition and Classification of Tires

Research Methods of the Report

Development Environment of Tires in China

Competition in Tire Market in China

Top 5 Enterprises in Tire Market in China

Major Development Opportunities and Driving Forces Faced by Tire Industry in

China

Risks and Challenges in the Development of Tire Industry in China

Price Trend of Raw Materials of Tires in China

Trend of Retail Prices of Tires in China

## Contents

### **1 RELEVANT CONCEPTS OF TIRE MANUFACTURING INDUSTRY**

- 1.1 Definition of Tires
- 1.2 Classification of Tires
- 1.3 Research Methods of the Report
  - 1.3.1 Parameters and Assumptions
  - 1.3.2 Data Sources
  - 1.3.3 About CRI

### **2 OPERATION STATUS OF TIRE MANUFACTURING INDUSTRY IN CHINA, 2011-2015**

- 2.1 Development Environment of Tire Industry in China
  - 2.1.1 Economic Environment
  - 2.1.2 Policy Environment Faced by Tire Industry in China
- 2.2 Analysis of Tires Supply in China
- 2.3 Analysis on Demand for Tires in China
- 2.4 Export of Tires in China
  - 2.4.1 Export Overview
  - 2.4.2 Major Export Destinations of Tires in China

### **3 COMPETITION STATUS OF TIRE MANUFACTURING INDUSTRY IN CHINA, 2013-2015**

- 3.1 Barriers to Entry in Tire Manufacturing Industry in China
  - 3.1.1 Coerce Certification Barriers
  - 3.1.2 Policy Barriers
  - 3.1.3 Technical Barriers
  - 3.1.4 Capital Barriers
  - 3.1.5 Barriers of Customer Resources
- 3.2 Competition Structure of Tire Manufacturing Industry in China
  - 3.2.1 Bargaining Ability of Raw Material Suppliers of Tires
  - 3.2.2 Bargaining Ability of Tire Clients
  - 3.2.3 Internal Competition of Tire Industry in China
  - 3.2.4 Potential Entrants of Tire Industry in China
  - 3.2.5 Substitutes of Tires

## **4 TOP 5 TIRE MANUFACTURERS IN CHINA, 2013-2015**

### **4.1 Zhongce Rubber Co., Ltd.**

#### **4.1.1 Enterprise Profile of Zhongce Rubber Co., Ltd.**

#### **4.1.2 Analysis on Tire Business of Zhongce Rubber Co., Ltd.**

### **4.2 Triangle Tyre Co., Ltd.**

#### **4.2.1 Enterprise Profile of Triangle Tyre Co., Ltd.**

#### **4.2.2 Tire Business of Triangle Tyre Co., Ltd.**

### **4.3 Giti Tire Investment Co., Ltd. (China)**

#### **4.3.1 Enterprise Profile of Giti Tire**

#### **4.3.2 Tire Business of Giti Tire**

### **4.4 Shandong Linglong Rubber Co., Ltd.**

#### **4.4.1 Enterprise Profile of Shandong Linglong Rubber Co., Ltd.**

#### **4.4.2 Tire Business of Shandong Linglong Rubber Co., Ltd.**

### **4.5 Xiamen Cheng Shin Rubber Ind. Co., Ltd.**

#### **4.5.1 Enterprise Profile of Xiamen Cheng Shin**

#### **4.5.2 Tire Business of Xiamen Cheng Shin**

## **5 ANALYSIS ON COST AND PRICE IN TIRE MANUFACTURING INDUSTRY IN CHINA, 2013-2015**

### **5.1 Analysis on Cost in Tire Manufacturing Industry in China, 2013-2015**

### **5.2 Analysis on Sales Price of Tires in China, 2013-2015**

## **6 PREDICTION ON THE DEVELOPMENT OF TIRE MANUFACTURING INDUSTRY IN CHINA, 2016-2020**

### **6.1 Factors Influencing the Development of Tire Industry in China**

#### **6.1.1 Forecast on Major Driving Forces and Market Opportunities in Tire Industry in China**

#### **6.1.2 Risks and Challenges in Tire Industry in China**

### **6.2 Prediction on Supply in Tire Industry in China**

### **6.3 Forecast on Demand in Tire Industry in China**

## Selected Charts

### SELECTED CHARTS

Chart Output Volume of Automobiles in China, 2011-2015  
Chart Reserve of Civil Automobiles in China, 2011-2015  
Chart Related Policies and Regulations in Tire Industry in China, 2011-2015  
Chart Output Volume of Rubber Tires in China, 2011-2015  
Chart Sales Revenue of Tire Manufacturing Products, 2011-2015  
Chart Export Status of Tires in China, 2011-2015  
Chart Major Export Destinations of Tires in China, 2015  
Chart Major Tire Manufacturers and Their Market Share in China, 2013-2015  
Chart Sales Revenue of Tires of Zhongce Rubber, 2013-2015  
Chart Market Share of Tires of Zhongce Rubber in China, 2013-2015  
Chart Sales Revenue of Triangle Tyre, 2013-2015  
Chart Market Share of Tires of Triangle Tyre in China, 2013-2015  
Chart Market Share of Tires of Giti in China, 2013-2015  
Chart Market Share of Tires of Shandong Linglong, 2013-2015  
Chart Market Share of Tires of Xiamen Cheng Shin in China, 2013-2015  
Chart Price Trend of Imported No.3 Smoked Sheet Rubber in China, 2013-2015  
Chart Price of Synthetic Rubber and Styrene Butadiene Rubber in China, 2013-2015  
Chart Price Index of Dealers of Tires for Basic Passenger Vehicles (Limousine) in China, 2013-2015  
Chart Price Index of Dealers of Tires for Trucks and Passenger Vehicles in China, 2013-2015  
Chart Forecast on Output Volume of Tires in China, 2016-2020  
Chart Forecast on Sales Revenue of Tire Manufacturing Industry in China, 2016-2020

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