

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

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