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World Tires

Industry Study with Forecasts for **2015 & 2020**

Study #2860 | February 2012 | \$5800 | 478 pages

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INDUSTRY STRUCTURE

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The large motor vehicle tire market will see an acceleration in growth through 2015 as motor vehicle industries in many important producing countries rebound from recent declines.

World demand to rise 4.7% annually through 2015

World demand for tires is forecast to rise 4.7 percent per year through 2015 to 3.3 billion units. In value terms, the tire market is projected to advance 6.5 percent annually over the same span to \$220 billion. The large motor vehicle tire market will see an acceleration in growth through 2015, advancing to 1.9 billion units as motor vehicle industries in many important producing countries rebound. Stronger gains will be registered by the industrial and other tires segment, which includes a variety of tire types, including bicycle, motorcycle and off-road tires.

Asia/Pacific region to offer best growth opportunities

The Asia/Pacific region is by far the largest market for tires, accounting for over half of global tire demand in 2010, thanks in large part to its huge appetite for bicycle and motorcycle tires. In addition, the region will register the strongest growth in tire demand through 2015, despite the fact that the large Japanese tire market is expected to see extremely sluggish growth. The massive Chinese tire market, which alone accounted for more than one-quarter of global tire demand in 2010, will record the strongest gains of any country through 2015. Although the majority of tire demand in China is comprised of motorcycle and bicycle tires, sales of motor vehicle tires in the country are also the second highest in the world,

World Tire Demand, 2015 (3.3 billion units)



| | |
|--------------------|-----|
| China | 34% |
| Other Asia/Pacific | 23% |
| North America | 15% |
| Western Europe | 12% |
| Other Regions | 16% |

photo: AP

behind only the US. The tire markets in North America and Western Europe will continue to see advances below the global average, although both regions will rebound from the declines recorded during the 2005 to 2010 period.

Motor vehicle tires to remain largest market

Motor vehicle tires, which accounted for over 60 percent of all tire demand in 2010, will remain the largest segment of the tire market in 2015. As income levels increase worldwide, the share of the global population able to own a vehicle will rise. This growth will bolster demand for both OEM and replacement motor vehicle tires, especially for light vehicles.

Although the industrial and other tires segment includes a wide range of tires, the vast majority of demand is comprised of bicycle and motorcycle tires used in developing nations worldwide. The Asia/Pacific region will account for more than 90 percent of growth in unit terms through 2015. The massive size of this segment in the Asia/Pacific region is reflective of the large population levels, as well as of the low motor vehicle utilization rates throughout the region, except in Japan and South Korea. Although tires employed in some industrial applications will comprise a small portion of total unit sales, these products' share of sales in value terms is much more significant.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Tire Supply & Demand

The market for tires in India, which was 154.5 million units in 2010, is the fourth largest in the world. Through 2015, demand is forecast to rise 7.6 percent per annum to 223.0 million units, driven by growth in the domestic light vehicle market and industry. Heavy industrial and other tire sales, which accounted for 70 percent of total market in 2010, will remain the more important segment. Despite rapid growth in the motor vehicle tire market, the low vehicle utilization rate in India will limit demand for those tires.

Demand for motor vehicle tires in India, which totaled 40 million units in 2010, is expected to rise 7.6 percent per year through 2015. This growth is spurred by advances in technology and a rapidly expanding fleet of motor vehicles in use. The market for motor vehicle tires in India is expected to account for 83 percent of motor vehicle tire demand through 2015. Despite this robust growth, motor vehicle tire demand remains much smaller than the industrial and other tire segment. India continues to have one of the world's lowest vehicle utilization rates, a 2010 rate of just 16 vehicles per 1,000 persons. As a result, the market offers ample new sales opportunities for motor vehicle tire makers, and thus, tire makers. Rapid growth in these markets is expected to continue for the foreseeable future.

A large percentage of motor vehicle tire demand in India is for bias-ply (also called cross-ply) tires. Bias-ply tires are less expensive than radial tires and are often more durable on very rough roads. As roads in India continue to improve (e.g., a newly constructed highway now connects India's four largest cities), a growing share of the country's tire sales are expected to be derived from radial tires.

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TABLE VI-11

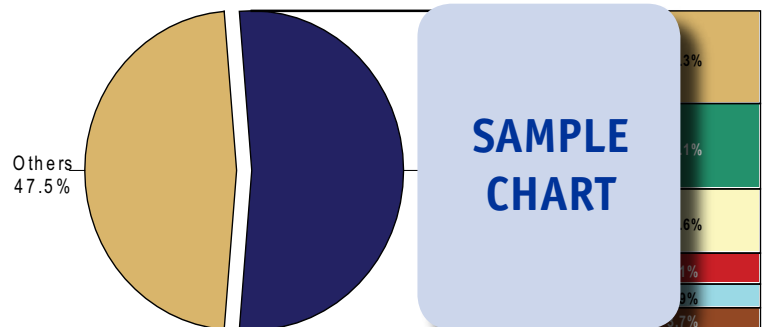
INDIA: TIRE SUPPLY & DEMAND
(million units)

| Item | 2000 | 2005 | 2010 | 2015 | 2020 |
|--|------|-------|-------|-------|-------|
| Motor Vehicle Production (000) | | | | | |
| OEM tires per vehicle | | | | | |
| Motor Vehicles in Use (million) | | | | | |
| replacement tires per vehicle | | | | | |
| Tire Demand | | | | | |
| Motor Vehicle: | | | | | |
| Light | | | | | |
| OEM | | | | | |
| Replacement | | | | | |
| Medium & Heavy | | | | | |
| OEM | | | | | |
| Replacement | | | | | |
| Industrial & Other | | | | | |
| net exports | | | | | |
| Tire Production | | | | | |
| Motor Vehicle: | | | | | |
| Light | | | | | |
| Medium & Heavy | | | | | |
| Industrial & Other | | | | | |
| % India | | | | | |
| Asia/Pacific Tire Production (mil units) | 91.0 | 120.7 | 170.0 | 200.0 | 240.0 |

SAMPLE
TABLE

CHART VIII-1

WORLD TIRE MARKET SHARE, 2010
(\$160 billion)

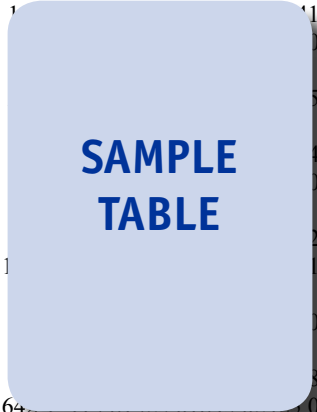


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-10
INDIA:
MARKET ENVIRONMENT FOR TIRES

| Item | 2000 | 2005 | 2010 | 2015 | 2020 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Population (million) | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| per capita GDP | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| Gross Domestic Product (bil 2009\$) | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| % GFI | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| Gross Fixed Investment (bil 2009\$) | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| tires/mil \$ GDP | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| tires/mil \$ GFI | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| Tire Demand (mil units) | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| % India | 1,028 | 1,106 | 1,199 | 1,296 | 1,398 |
| Asia/Pacific Tire Demand (mil units) | 64,000 | 64,000 | 64,000 | 64,000 | 64,000 |



COMPANY PROFILES

Aeolus Tyre Company Limited

48 Jiaodong South Road
 Jiaozuo, Henan 454003
 China
 86-391-391-3913
 http://www.aeolustyre.com

Sales: \$1.2 billion
 Employees: 10,000

Key Products: off-road, truck and bus bias-ply, light truck, medium- and heavy-duty truck, military, agricultural equipment and industrial types.



Aeolus Tyre manufactures and sells tires, tire-related raw materials, parts and machinery. The Company is partially owned by China Haohua Chemical Industrial Group Corporation, a subsidiary of China National Chemical Corporation.

The Company's tires include off-road, truck and bus radial, truck and bus bias-ply, light truck, medium- and heavy-duty truck, military, agricultural equipment and industrial types. These products are available under the AEOLUS and HENAN brand names. In July 2011, the Company introduced the AGT tire, an environmentally friendly product that utilizes a reduced amount of heavy metals and is made using a less energy-intensive process.

Manufacturing activities are conducted at a 640,000-square-meter production facility in Jiaozhou, China. As of 2011, the plant had an annual production capacity of six million tires. The Company expects to open a second plant in Jiaozhou, China by the end of 2011 to manufacture passenger car tires, as well as off-road tires. This will mark Aeolus

"India possesses the third largest global tire industry, with 2010 shipments of 166.0 million units. Production is expected to increase 7.7 percent annually through 2015 to 241.0 million units, driven by the strong domestic tire market. Locally owned firms such as MRF, Apollo Tyres, Ruia Group, JK Tyre, Birla Tyres and CEAT dominate domestic tire production. India, which had a 2010 trade surplus in tires equivalent to ..."
 --Section VI, pg. 190

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OTHER STUDIES

World Rubber Processing Chemicals

Global demand for rubber processing chemicals will rise 4.7 percent yearly to 1.4 million metric tons in 2015. China will remain the largest and fastest growing market. Accelerators and processing aids will be among the fastest growing types, while antidegradants will remain the largest segment. This study analyzes the 1.1 million metric ton world rubber processing chemical industry, with forecasts for 2015 and 2020 by type of rubber, chemical, market, world region and for 27 countries. The study also evaluates company market shares and profiles industry players.

#2863 March 2012..... \$6100

Special Offer: Buy both World Rubber and World Tires for \$8700

Global rubber consumption is forecast to rise 4.3 percent annually through 2015 to 30.5 million metric tons, driven by increasing tire output as global motor vehicle production accelerates from a weak base. The Asia/Pacific market will remain dominant and grow the fastest. Non-tire rubber sales will outpace growth in tire rubber sales. This study analyzes the 24.8 million metric ton world rubber industry, with forecasts for 2015 and 2020 by market, world region and for 30 countries. The study also evaluates company market shares and profiles industry players.

#2843 March 2012..... \$5800

World Kaolin

The world market for kaolin is projected to grow 3.7 percent per year through 2015 to 28.4 million metric tons. The biggest gains will be in China, which will easily overtake the US to become the world's largest kaolin market. Paper will remain the largest segment while ceramics will grow the fastest. This study analyzes the 24 million metric ton world kaolin industry, with forecasts for 2015 and 2020 by market, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#2846 February 2012..... \$5900

World Specialty Silicas

World demand for specialty silicas will grow 5.6 percent annually to 2.8 million metric tons in 2016. Precipitated silica will remain dominant, with good growth fueled by the adoption of "green tires", especially in North America and the Asia/Pacific region. China will be the largest and fastest growing market. This study analyzes the 2.1 million metric ton world specialty silica industry, with forecasts for 2016 and 2021 by product, market, world region and for 16 major countries. The study also evaluates company market share and profiles industry players.

#2596 February 2010..... \$5700

Specialty Silicas

US demand for specialty silicas is forecast to rise 5.8 percent annually through 2015. Fumed silica will be the fastest growing type, fueled by a strong rebound in nontire rubber consumption. Precipitated silica will remain the leading segment, based in part on gains in silica-reinforced low rolling-resistance tires, which offer greater fuel efficiency than conventional tires. This study analyzes the \$1.3 billion US specialty silica industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2762 May 2011..... \$4800

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