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World Tires

Industry Study with Forecasts for **2017 & 2022**

Study #3105 | January 2014 | \$6100 | 448 pages



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Growth will continue to be led by developing countries in the Asia/Pacific region, particularly China and India, and supported by better economic conditions in developed Western countries.

World demand to rise 4.3% annually through 2017

World demand for tires is forecast to rise 4.3 percent per year to 2.9 billion units in 2017. In value terms, sales of tires are projected to increase 7.9 percent annually to \$281 billion. Growth in the tire market will continue to be led by developing countries in the Asia/Pacific region, particularly China and India. Global demand for tires will also be supported by improved economic conditions in the developed countries of Western Europe and North America, but gains in these regions will continue to trail the global average.

Majority of new growth to occur in the Asia/Pacific region

The Asia/Pacific region will be responsible for the bulk of global tire demand gains, accounting for two-thirds of total growth through 2017. China is the largest national market for tires in the world, representing 22 percent of global demand in 2012. Growth in demand for tires in China will not match the rapid gains posted over the 2007-2012 period -- as expansion of both motor vehicle production and usage will slow -- but China will remain among the world's fastest growing markets. Other major tire markets in the Asia/Pacific region include Japan and India, which ranked as the world's third and fourth largest, respectively, in 2012. India is expected to surpass Japan as the world's third largest tire consumer by 2017.

World Tire Demand, 2017 (2.9 billion units)



photo: Doublestar

Demand for tires in North America and Western Europe will show improvement relative to the 2007-2012 period, but gains will remain below two percent per annum in both regions through 2017. Stronger economic environments will result in advances in both new vehicle production and vehicle usage, supporting growth in demand for tires. However, slow growth in population and the motor vehicle stock will serve to constrain gains. In addition, the losses in new vehicle production that occurred in both regions between 2007 and 2012 will not be fully recovered, as significant production capacity was permanently transferred to lower-cost developing countries.

Non-motor vehicle markets to grow fastest

Gains in the dominant motor vehicle market will be driven by growing motor vehicle usage in developing countries, spurring demand for tires in both OEM and replacement applications. The market for motorcycle tires is forecast to expand at an above average rate through 2017. Relative to motor vehicles, usage of motorcycles is concentrated in faster growing developing regions. The tire segment that includes industrial, agricultural, aircraft, and other tires will post the fastest growth, supported by demand in developing regions; however, these will remain a very small portion of overall tire demand.

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Sample Text, Table & Chart

ASIA/PACIFIC

Vietnam: Tire Market Outlook

The market for tires in Vietnam is forecast to climb over annually to 42.1 million units, continuing to be the fastest growing in the world. Gains will come from the motorcycle industry, as well as by the gains, other factors, such as a centrally planned economy, made car ownership in Vietnam rare. In 2012, only eight motorcycles were owned per 1,000 people in the country. This utilization among the lowest of any country in the world. Although incomes are rising, vehicle ownership will remain very uncommon in the foreseeable future. As a result, motor vehicle tires will remain an insignificant share of the tire market.

Vietnam's population, which were 1.1 million in 2012, are projected to rise to 1.5 million through 2022. This growth will be fueled by a robust double-digit annual increase in the motor vehicle industry, but the market size will nevertheless be miniscule by regional standards. Because the country has had extremely low income levels, ownership of motor vehicles among the Vietnamese population. Other factors, such as a centrally planned economy, made car ownership in Vietnam rare. In 2012, only eight motorcycles were owned per 1,000 people in the country. This utilization among the lowest of any country in the world. Although incomes are rising, vehicle ownership will remain very uncommon in the foreseeable future. As a result, motor vehicle tires will remain an insignificant share of the tire market.

Other tire demand in Vietnam in 2012, is projected to rise over 42.1 million units. Gains will come from the motorcycle industry, as well as by the gains, other factors, such as a centrally planned economy, made car ownership in Vietnam rare. In 2012, only eight motorcycles were owned per 1,000 people in the country. This utilization among the lowest of any country in the world. Although incomes are rising, vehicle ownership will remain very uncommon in the foreseeable future. As a result, motor vehicle tires will remain an insignificant share of the tire market.

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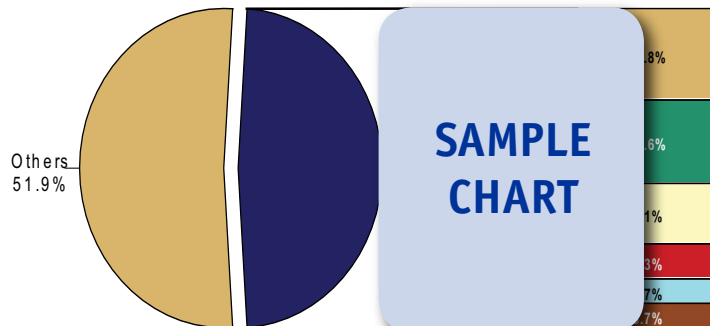
TABLE VI-30

VIETNAM: TIRE SUPPLY & DEMAND (million units)

Item	2002	2007	2012	2017	2022
Population (million persons)	80.2	87.5	92.0	95.3	98.3
per capita GDP	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2011\$)	100	150	200	250	300
% GFI	15	18	20	22	25
Gross Fixed Investment (bil 2011\$)	15	27	40	55	75
tires/mil \$ GDP	0.0001	0.0001	0.0001	0.0001	0.0001
tires/mil \$ GFI	0.0007	0.0007	0.0007	0.0007	0.0007
Tire Demand	10	15	20	25	30
net exports	0	0	0	0	0
Tire Production	0	0	0	0	0
Motor Vehicle:					
Light					
Medium & Heavy					
Other					
% Vietnam					
Asia/Pacific Tire Production	80.2	115.7	150.2	195.3	250.0

CHART VIII-1

WORLD TIRE MARKET SHARE (\$192 billion, 2012)



Sample Profile, Table & Forecast

TABLE VI-31
VIETNAM: TIRE DEMAND BY MARKET
 (million units)

Item	2002	2007	2012	2017	2022
Motor Vehicle Production (000 units)					95
OEM tires per motor vehicle					6
Motor Vehicles in Use					7
replacement tires per motor vehicle					9
Tire Demand					8
Motor Vehicle:					7
Light					7
OEM					5
Replacement					2
Medium & Heavy					0
OEM					-
Replacement					0
Other					1
% Vietnam					4
Asia/Pacific Tire Demand					0.0



COMPANY PROFILES

Aeolus Tyre Company Limited
 48 Jiaodong South Road
 Jiaozuo, Henan 454003
 China
 86-391-3
 http://www

SAMPLE PROFILE

Sales: \$
 Geograph
 Country
 Employ

Key Products: off-road, truck and bus radial, truck and bus bias-ply, passenger car and light truck, medium and heavy duty truck, military, agricultural equipment, and industrial tires

Aeolus Tyre produces 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, passenger car and light truck, medium and heavy duty truck, military, agricultural equipment, and industrial types. These products are available under the AEOLUS, HENAN, and WINDPOWER brand names. In 2012, Aeolus Tyre's tire sales totaled \$1.4 billion.

Production activities are conducted at two facilities in Jiaozhou, China, one of which occupies 600,000 square meters of space and other 640,000 square meters of space. The 600,000 square meter site manufactures passenger car tires, as well as off-road tires. Outside of China,

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STUDY COVERAGE

This Freedonia study, *World Tires*, offers historical data (2002, 2007, 2012) as well as forecasts for 2017 and 2022 for tire supply and demand, as well as demand by market in six regions and 26 major countries. The study also assesses key market environment factors, details industry structure, evaluates company market share and profiles 32 competitors in the global tire industry.

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OTHER STUDIES

World Motorcycle Components

World demand for motorcycle components, including those for electric bicycles (e-bikes) and motorcycles (e-cycles), will grow 7.5 percent annually to \$119.5 billion in 2017. Engine and drivetrain parts will remain the largest category, while tires will grow the fastest. The Asia/Pacific region will remain the dominant market. This study analyzes the \$83.2 billion world motorcycle component industry, with forecasts for 2017 and 2022 by market, product, world region, and for 20 countries. The study also evaluates company market share and profiles industry participants.

#3061 August 2013 \$5900

Motorcycles in China

Demand for motorcycles in China is projected to increase 5.5 percent per annum through 2016 to 57.7 million units. Electric motorcycles will outpace gas motorcycles, with mopeds the most popular electric model because they are faster than electric bicycles and cost less than scooters. This study analyzes the 44.1 million unit motorcycle industry in China, with forecasts for 2016 and 2021 by product, gas engine displacement, electric battery type, market and geographic region. The study also evaluates company market share and profiles industry participants.

#2988 February 2013 \$5400

World Motorcycles

The global market for motorcycles, including electrically-powered machines, will grow 7.2 percent annually to 134.5 million units in 2016. China will remain by far the largest national market, followed by India and Indonesia. Sales of e-bikes and e-cycles will grow roughly in line with internal combustion engine (ICE) motorcycle demand. This study analyzes the 95 million unit world motorcycle industry, with forecasts for 2016 and 2021 by type, world region and for 23 countries. The study also evaluates company market share and profiles industry players.

#2972 January 2013 \$6300

World Buses

The world market for buses will grow 5.0 percent annually to 632,000 units in 2016. Type C school buses will lead gains, due largely to rapidly expanding use in China. Transit bus demand will rise at the next fastest rate. The Asia/Pacific region will offer the best growth opportunities, with China and India alone accounting for three-fifths of all new bus demand. This study analyzes the 495,000 unit global bus market, with forecasts for 2016 and 2021 by type, world region and for 25 countries. The study also evaluates company market share and profiles industry participants.

#2933 November 2012 \$6100

Automotive Aftermarket in North America

The North American light vehicle aftermarket is projected to rise 3.2 percent annually to \$85.5 billion in 2016. The US will record the slowest gains but will represent four-fifths of the region's total sales growth. Electronics will be the fastest growing product segment. The dominant professional market will outpace the DIY segment. This study analyzes the \$73 billion automotive aftermarket in North America, with forecasts for 2016 and 2021 by country, product and service performer. The study also evaluates company market shares and profiles industry participants.

#2927 August 2012 \$5100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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