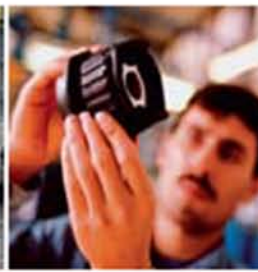


European Tyre & Rubber Industry

Statistics

EDITION 2015



The ETRMA Statistics Report

What is this report: part of the work of ETRMA is that of collecting information and data with regard to the tyre and general rubber goods industry. This report should give you a clear picture of the size of the European Industry and its relations with the rest of the world.

How to use this report: as you can see on the right each section of the report is marked by a colour. These colours will guide you through the report and will help you skipping to the section you want to review.

Our sources: ETRMA used for this report a variety of sources. These include its own members, Eurostat, LMC, ACEA and the International Rubber Study Group.

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2014 and beyond

GENERAL RUBBER GOODS Production and Trade

TYRES: Production, New and Retread Sales, Trade and End of Life

RUBBER

Appendix: Export and Import Tariffs



ETRMA is the leading voice of tyre and rubber goods producers. Since 1959, the Association is devoted to advocating the interests of the tyre and rubber manufacturing industries with the European Union institutions and other international organizations.

ETRMA contributes to ensuring the development, competitiveness and growth of the tyre and rubber industry in contributing to all the initiatives in favour of health, safety & environment protection, transport and road safety and access to third markets in coordination with the European public authorities.

Statistical data are an important element of the knowledge about our sector consisting of a wide range of products, many of which are traded internationally. The product range of our Members is extensive from tyres, construction and automotive rubber goods to pharmaceutical, baby care, etc.

Trade has become a more important and sensitive issue than in the past: Europe is still recovering from the financial crisis, whilst emerging countries are catching up and rapidly increasing their market share in the EU.

For this reason it is essential to have a complete picture of the tyre and general rubber goods sector through accurate statistics.

For all other information, we invite you to visit our website www.etrma.org or contact the ETRMA secretariat.

The European Tyre and Rubber Industry

This section will run you through the following points:

- Who are the Members of ETRMA;
- Where are their Brussels Offices;
- Where are their European plants;
- ETRMA's Secretariat.

ETRMA

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Appendix: Export and Import Tariffs

ETRMA's Members and

Tyre Corporate

National Associations Affiliated members



Apollo Vredestein
www.vredestein.com



www.coopertire.com



www.marangoni.com



www.nokiantyres.com



www.bridgestone.eu



www.goodyear.com



www.michelin.com



www.pirellityre.com



www.conti-online.com



www.hankooktire-eu.com



www.mitas-tyres.com



www.trelleborg.com



Belgium
www.federplast.be



Germany
www.wdk.de



France
www.lecaoutchouc.com



The Netherlands
www.vereniging-nvr.nl



Kumiteollisuus ry

Finland

www.kumiteollisuus.fi



ASSOGOMMA
Federazione Gomma Plastica

www.federazionegommaplastica.it



Spain

www.consorti Caucho.es



Tyre Corporate – BRISA
www.brisa.com.tr



National Association – UK: BTMA
www.btmauk.com



Hungarian Tire Association
www.hta.org.hu/



POLISH TYRE INDUSTRY ASSOCIATION
www.pzpo.org.pl

...their Brussels' Representation



Continental Benelux
Square de Meeûs 37
1000 Brussels



Goodyear Dunlop Tires Europe
Culliganlaan 2A
1831 Diegem



Michelin
Avenue de Tervuren 12
1040 Brussels



Pirelli
Rue de Namur 73/D
1000 Bruxelles

ETRMA's Secretariat



**The President,
Mr Christian Kötz
(Continental)**



**The Secretary General,
Mrs Fazilet Cinaralp**



**Mirella Larsen,
Office Manager**

**Heinz-Jürgen Schmidt,
Director, Europool**



**The Vice-President,
Mr Thierry du
Granrut
(Syndicat National du
Caoutchouc et des
Polymères)**



**Marta Conti,
Coordinator , Trade and
Parliamentary Affairs**

**Jean Pierre Taverne,
Coordinator ELT-Technical
and Environmental Affairs**



**Lorenzo Zullo, Manager
Chemical Legislation and
Advocacy**



2013/2014 Key Figures

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2014 and beyond

GENERAL RUBBER GOODS Production and Trade

TYRES: Production , Sales and Trade

RUBBER

Appendix: Export and Import Tariffs

2013/2014 Key Figures

Source: ETRMA - Eurostat

LEGEND  Tyre  GRG (e) estimated  2012  2013  2014

DIRECT EMPLOYMENT (e)

Source: ETRMA



NUMBER OF COMPANIES

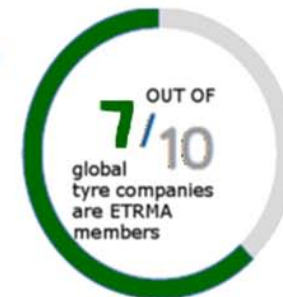
Source: EUROSTAT



GRG PRODUCTION IN MILLION TONNES (e)

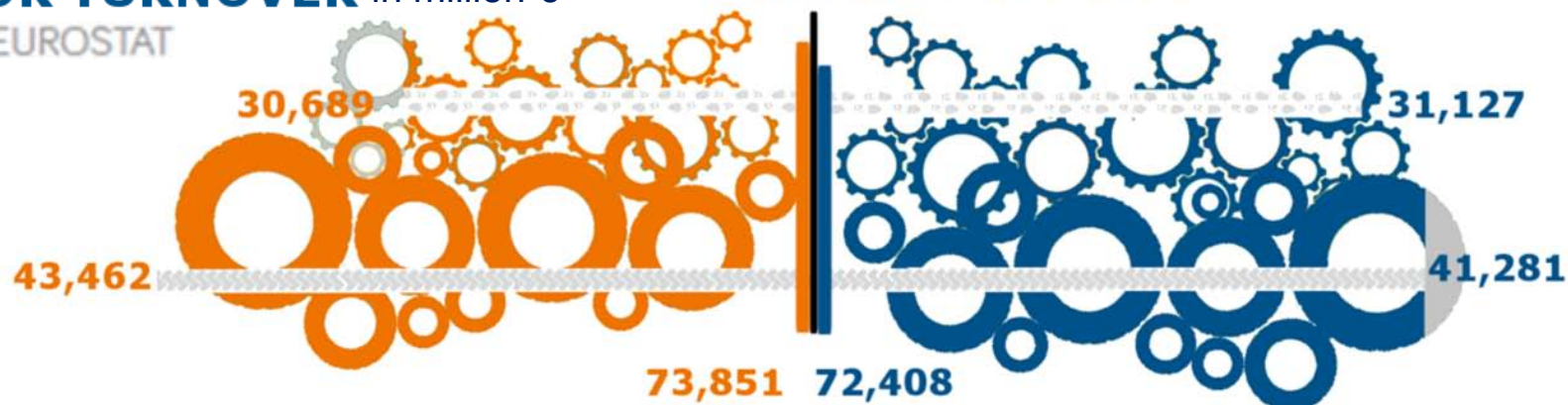


TYRES PRODUCTION IN MILLION TONNES (e)



SECTOR TURNOVER in million €

Source: EUROSTAT



2013/2014 Key Figures

Source: ETRMA, Eurostat, LMC – EU 27*

 Agro
  Moto
  PC & Light truck
  Medium and heavy commercial vehicles
  Truck
  Passenger car

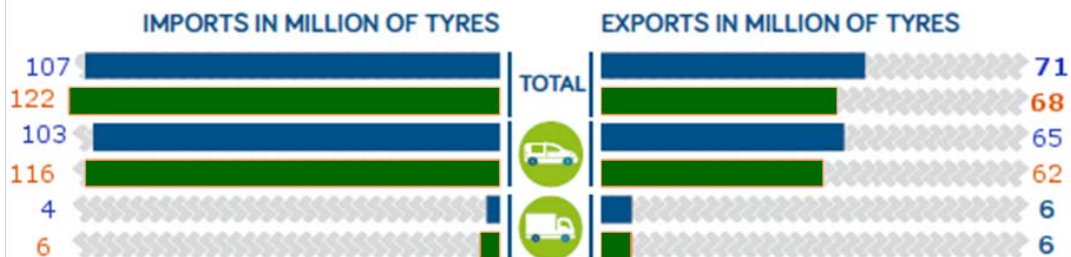
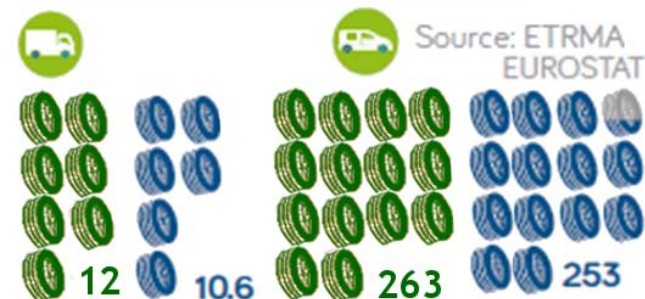
2012

2013

2014

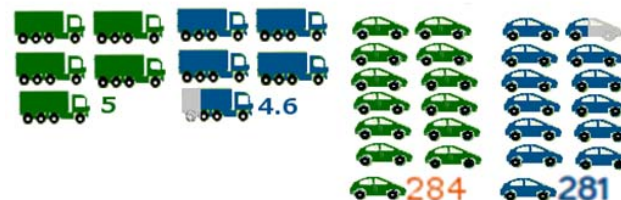


TYRE SALES IN MILLION OF UNITS



Source: EUROSTAT

VEHICLE PARK IN MILLION OF UNITS Source: LMC



Vehicle Data

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2014 and beyond

GENERAL RUBBER GOODS Production and Trade

TYRES: Production, New and Retread Sales, Trade and End of Life

RUBBER

Appendix: Export and Import Tariffs

Evolution of car parc on world major markets

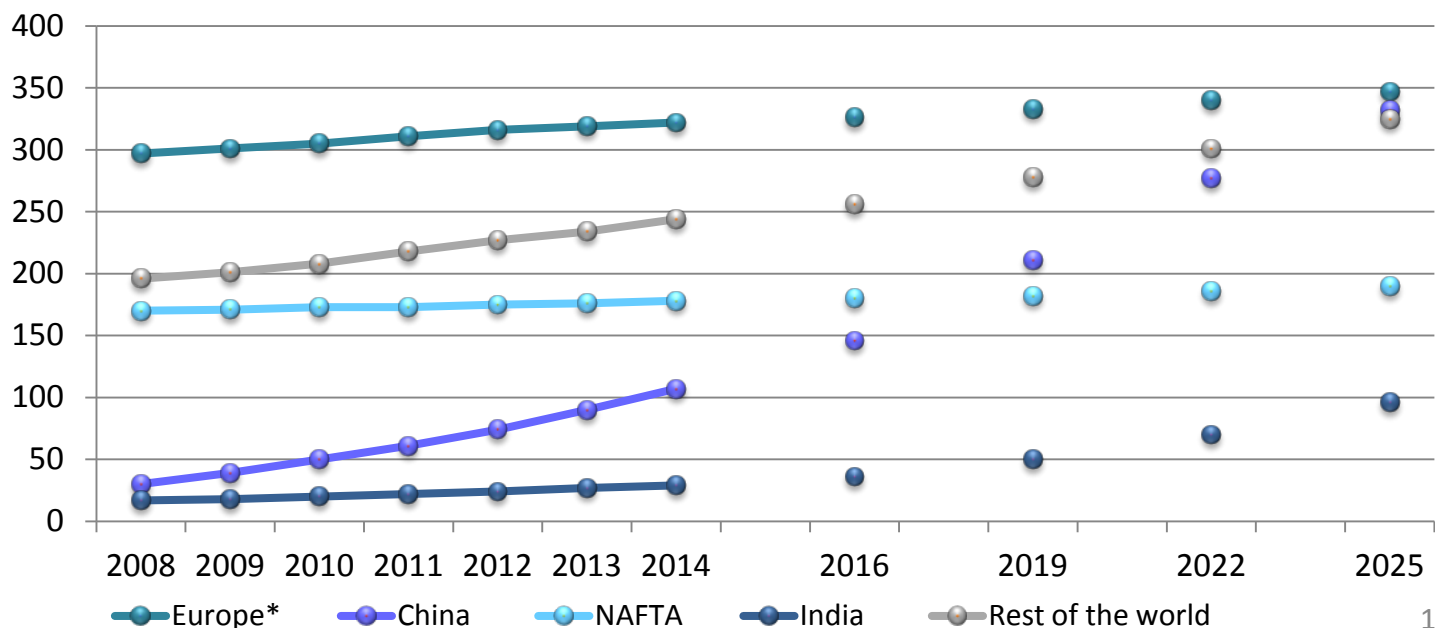
Source: LMC/in 000.000 passenger cars

	2008	2009	2010	2011	2012	2013	2014	2016	2019	2022	2025
Africa	12	12	12	13	13	14	14	16	18	21	24
ASEAN	20	21	23	24	26	28	30	34	39	45	52
East Asia	76	77	78	79	81	82	84	85	86	87	87
India	17	18	20	22	24	26	28	32	40	52	69
Middle East	31	32	34	37	39	40	42	45	51	57	64
Oceania	15	15	15	16	16	16	17	17	19	20	21
South America	42	44	46	49	52	54	57	59	65	71	77
Europe*	297	301	305	311	316	319	322	326	333	340	347
China	30	39	50	61	74	90	107	146	211	277	332
NAFTA	170	171	173	173	175	176	178	180	182	186	190

China and Rest of the world's car parcs are expected to experience a staggering growth

Europe and NAFTA's vehicles parc are expected to grow at a constant rate

*Europe includes all of Eastern, Central and Western Europe

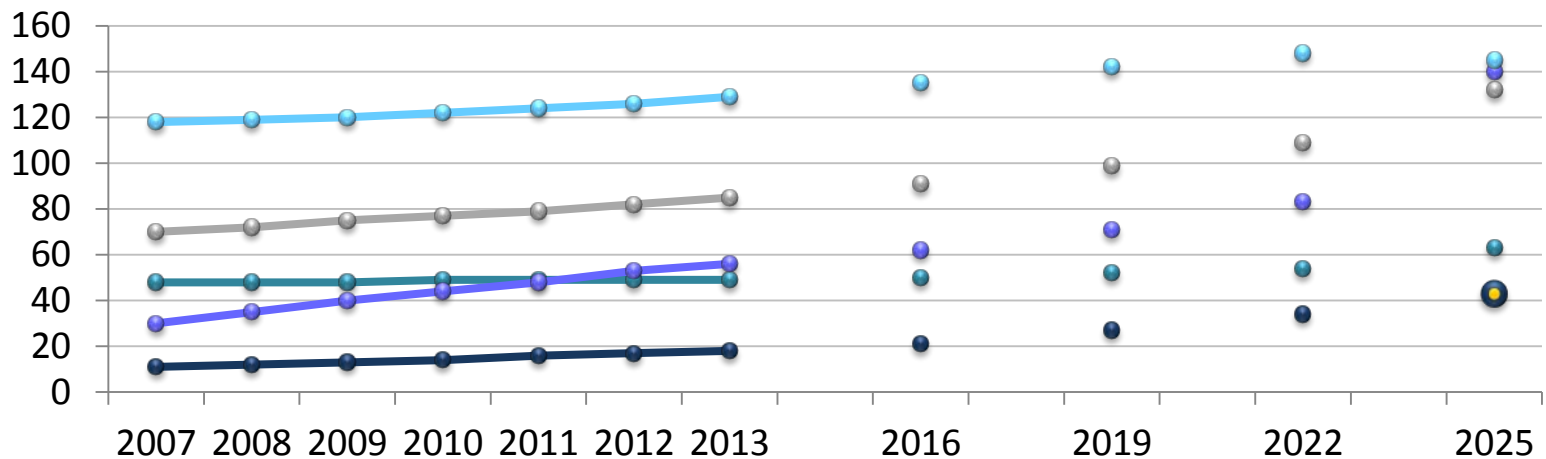


Evolution of Commercial Vehicle parc on world major markets

Source: LMC/in 000.000 units

Rest of the world

	2008	2009	2010	2011	2012	2013	2014		2016		2019		2022		2025
Africa	6	6	6	7	7	7	8		8		9		10		12
ASEAN	15	15	16	16	17	18	19		21		23		27		30
East Asia	22	22	22	22	21	21	21		20		20		19		19
India	11	12	13	14	16	17	18		21		27		34		43
Middle East	10	11	12	12	13	14	14		16		18		20		22
Oceania	4	4	4	4	4	4	4		5		5		6		6
South America	13	14	15	16	17	18	19		21		24		27		30
Europe*	48	48	48	49	49	49	49		50		52		54		57
China	30	35	40	44	48	53	56		62		71		83		92
NAFTA	118	119	120	122	124	126	129		135		142		148		153

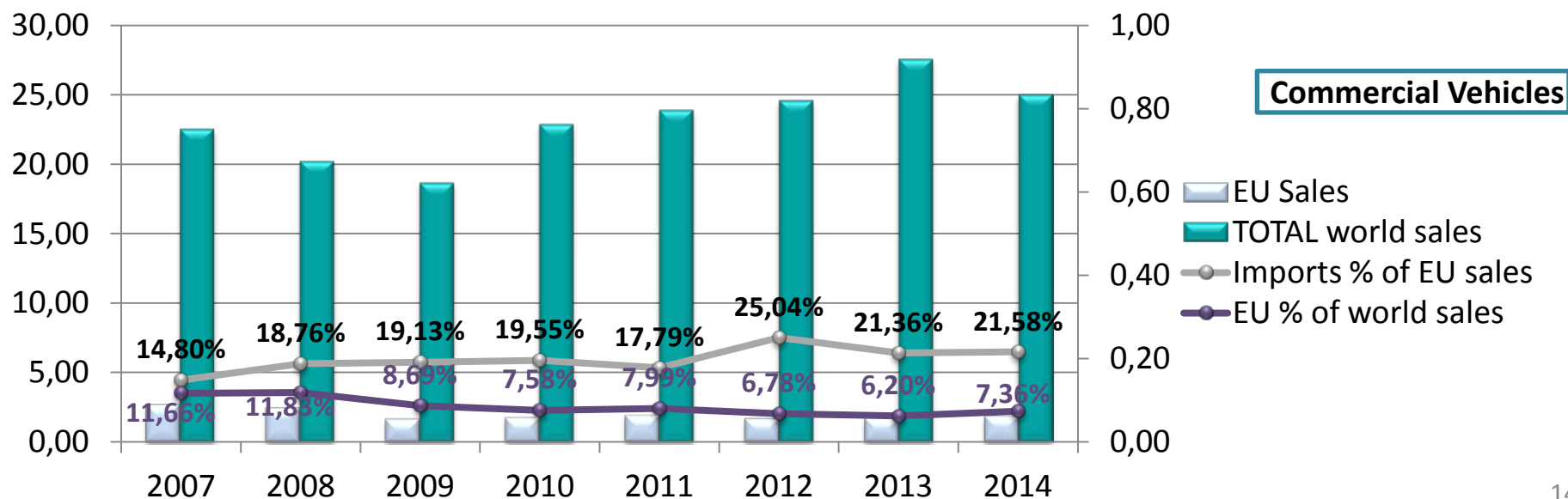
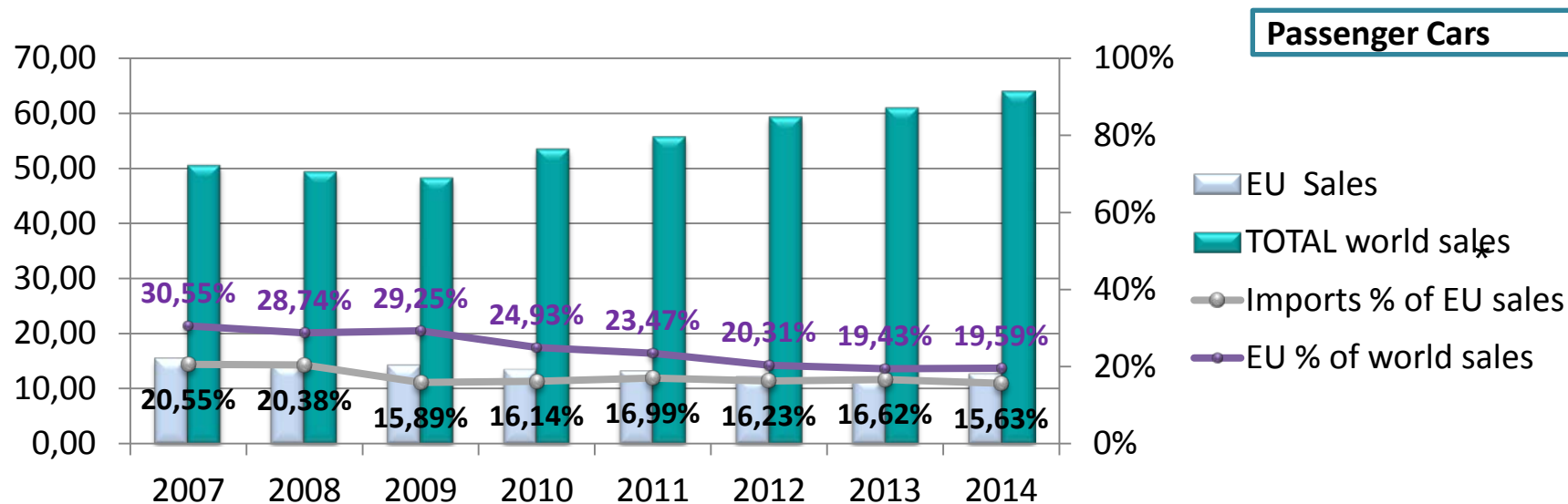


*Europe includes all of Eastern, Central and Western Europe

Rest of the World India Europe* China NAFTA

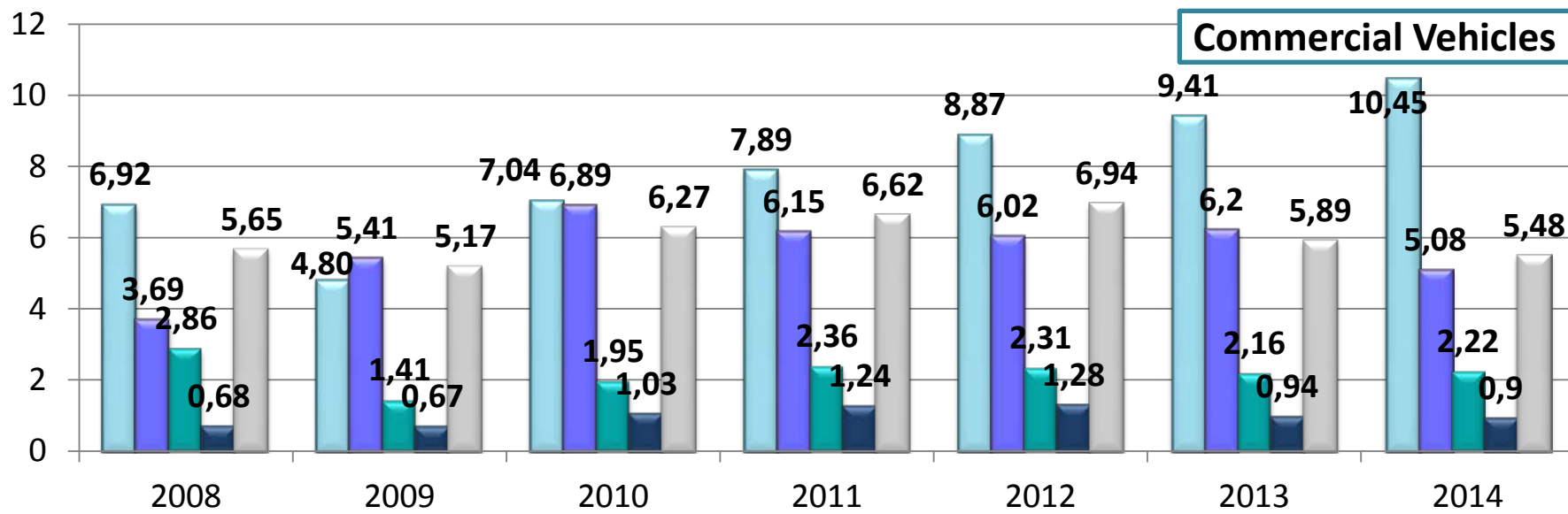
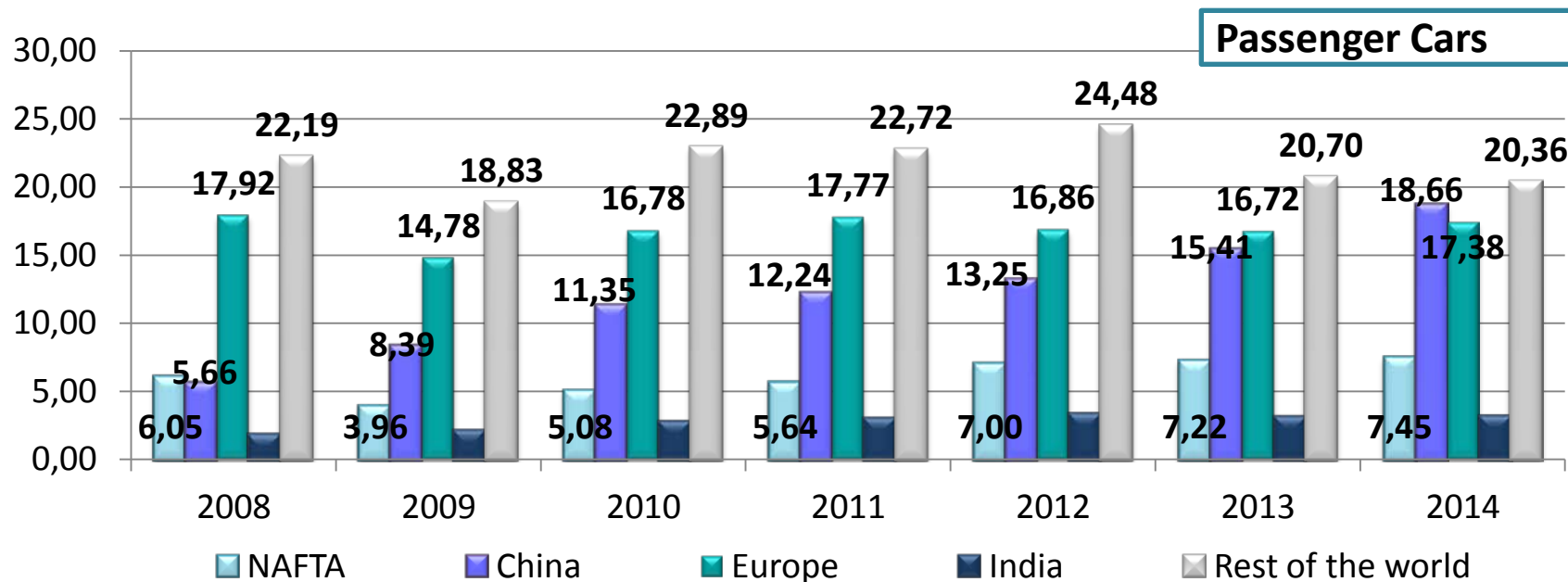
Sales and imports of passenger cars, LCV and MHCV in the EU and the world

Source: LMC, ACEA and Eurostat/in 000.000 units



Production of passenger cars, LCV and MHCV - major markets

Source: LMC /in 000.000 units



GENERAL RUBBER GOODS

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2014 and
beyond

**GENERAL RUBBER GOODS Production
and Trade**

TYRES: Production, New and Retread
Sales, Trade and End of Life

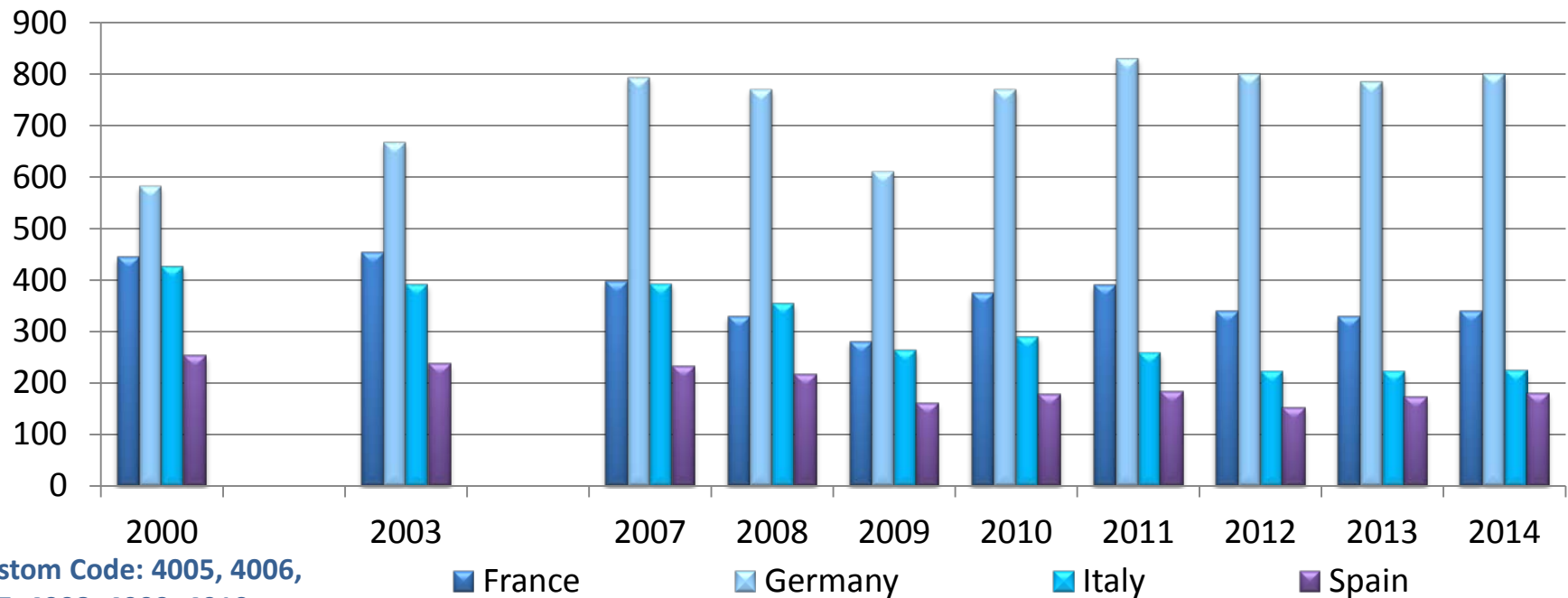
RUBBER

Appendix: Export and Import Tariffs

Evolution of GRG production*

Source: ETRMA/in 000 tonnes

	2000	2003	2007	2008	2009	2010	2011	2012	2013	2014
France	444	453	398	330	280	375	390	340	330	340
Germany	582	667	793	770	610	770	830	800	785	800
Italy	426	391	392	354	264	290	259	223	223	225
Spain	253	237	232	216	161	178	183	168	172	180



*Custom Code: 4005, 4006, 4007, 4008, 4009, 4010, 4014, 4015, 4016, and 4017

Top 10 global GRG companies

Source: ERJ

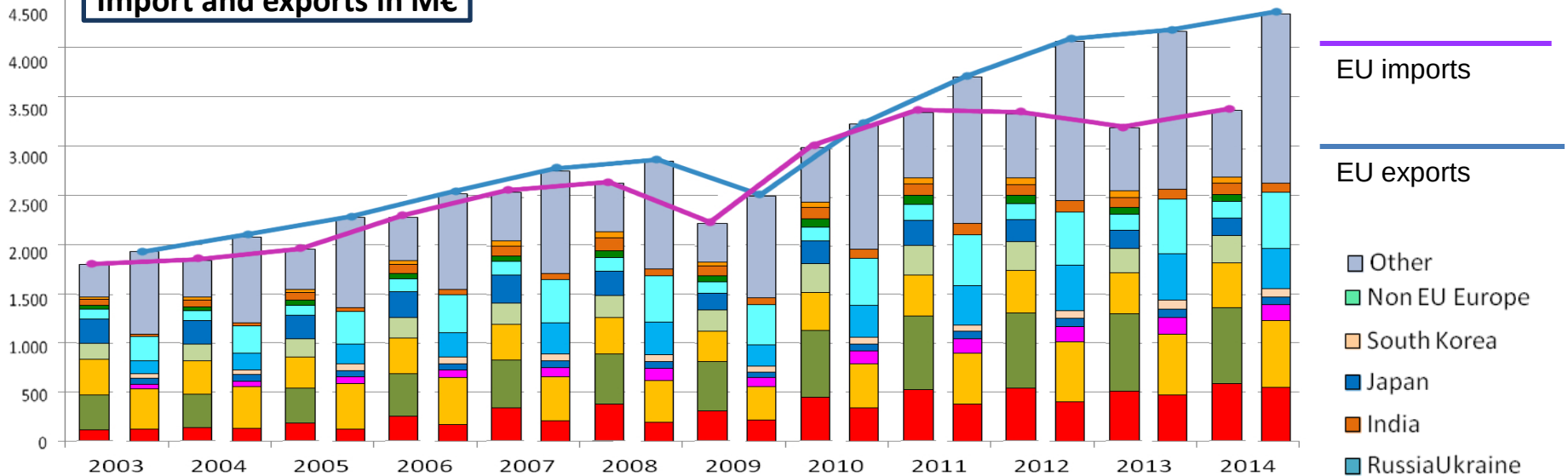
Rank 2013	Rank 2014	Company	Headquarter	2013 Non tyre rubber sales in \$B	2014 Non tyre rubber sales in \$B	Variation
1	1	Continental Ag	Germany	4,6	4,7	 2%
2	2	Hutchinson SA	France	4,3	4,6	 7%
3	3	Freudenberg Group ^(e)	Germany	3,9	4,2	 8%
N/A	4	Sumitomo Riko ^(e)	Japan	N/A	3,5	
5	5	Bridgestone Corp. ^(e)	Japan	3,3	3,4	 3%
8	6	Cooper Standard Auto	USA	3,1	3,2	 3%
N/A	7	Gates Corp	USA	N/A	3.1	
6	8	NOK Inc.	Japan	3,2	2,9	 -9%
9	9	Trelleborg AB	Sweden	2,6	2,7	 4%
10	10	Parker-Hannifin Corp ^(e)	USA	2,6	2,6	 0%

^(e)= estimate

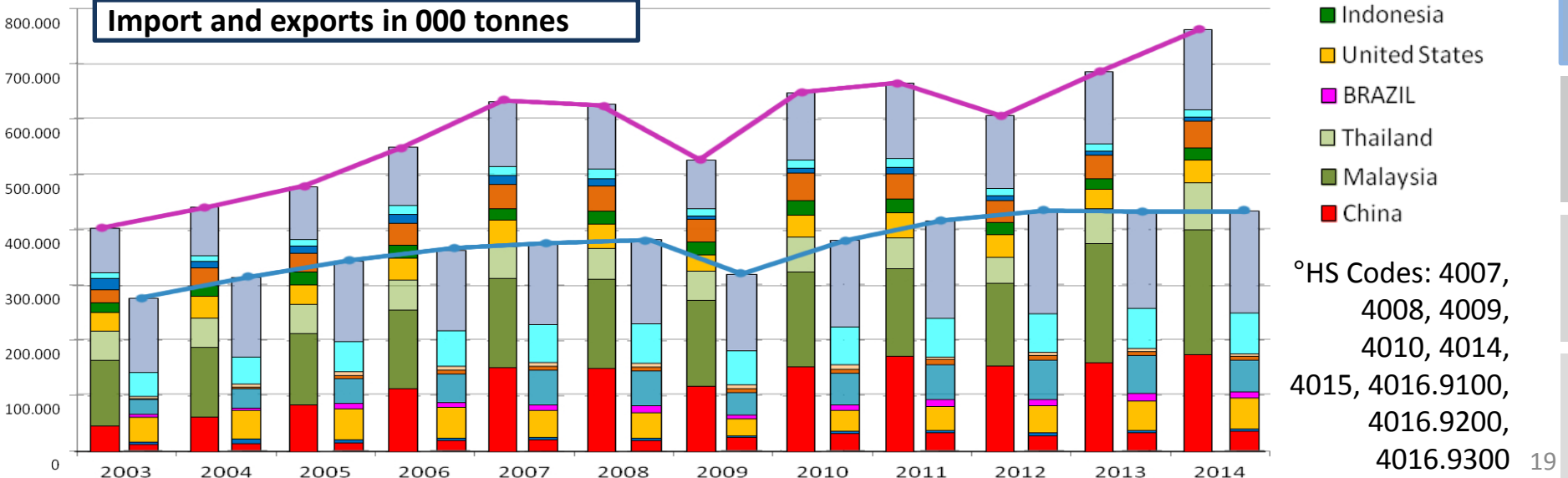
GRG° Import/Export

Source: Eurostat

Import and exports in M€



Import and exports in 000 tonnes



TYRES

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2014 and
beyond

GENERAL RUBBER GOODS Production
and Trade

TYRES: Production, New and Retread
Sales, Trade and End of Life

RUBBER

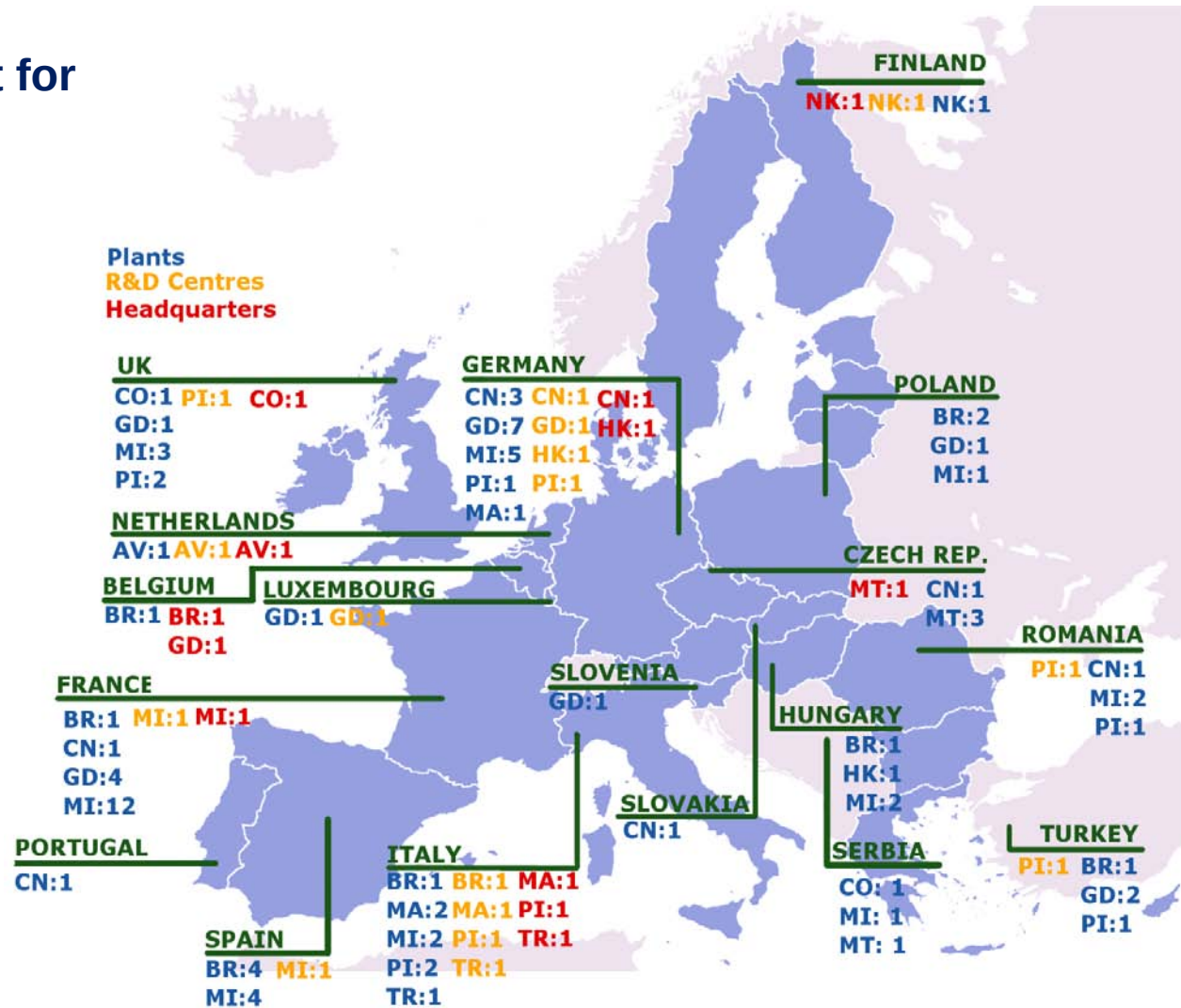
Appendix: Export and Import Tariffs

ETRMA's tyre companies plants

ETRMA members account for

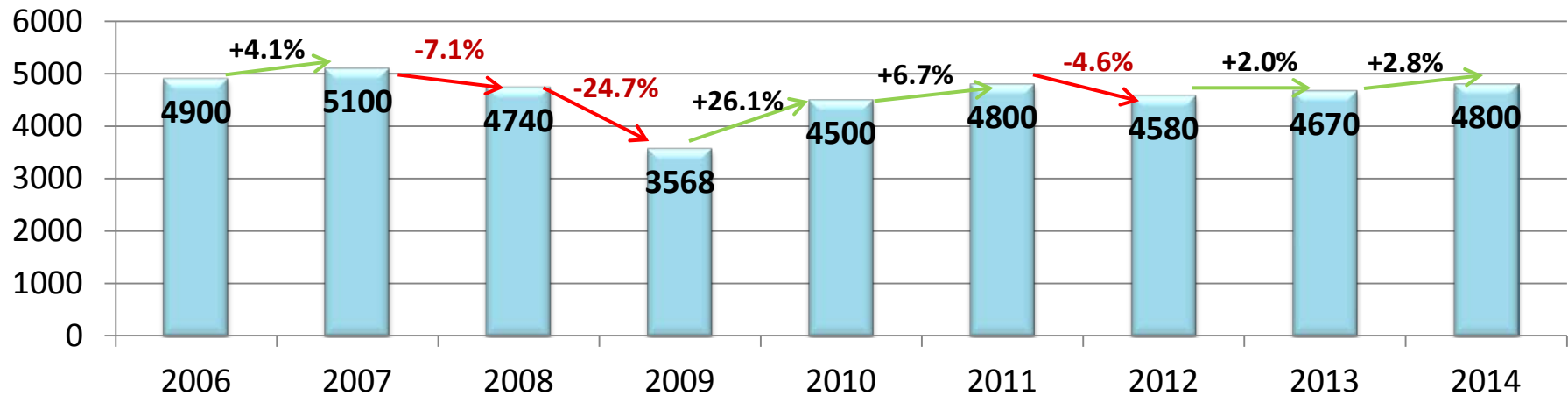
- 89 tyre plants
- 16 R&D centres
- 12 HQs

AV=Apollo Vredestein
BR=Bridgestone
CN=Continental
CO=Cooper
GD=Goodyear Dunlop
HK=Hankook
MA=Marangoni
MI=Michelin
MT=Mitas
NK=Nokian
PI=Pirelli
TR= Trelleborg Wheel Systems



EU tyre production and ranking of world tyre companies' sales

Source: ETRMA/000 tonnes and Tyre and Accessories

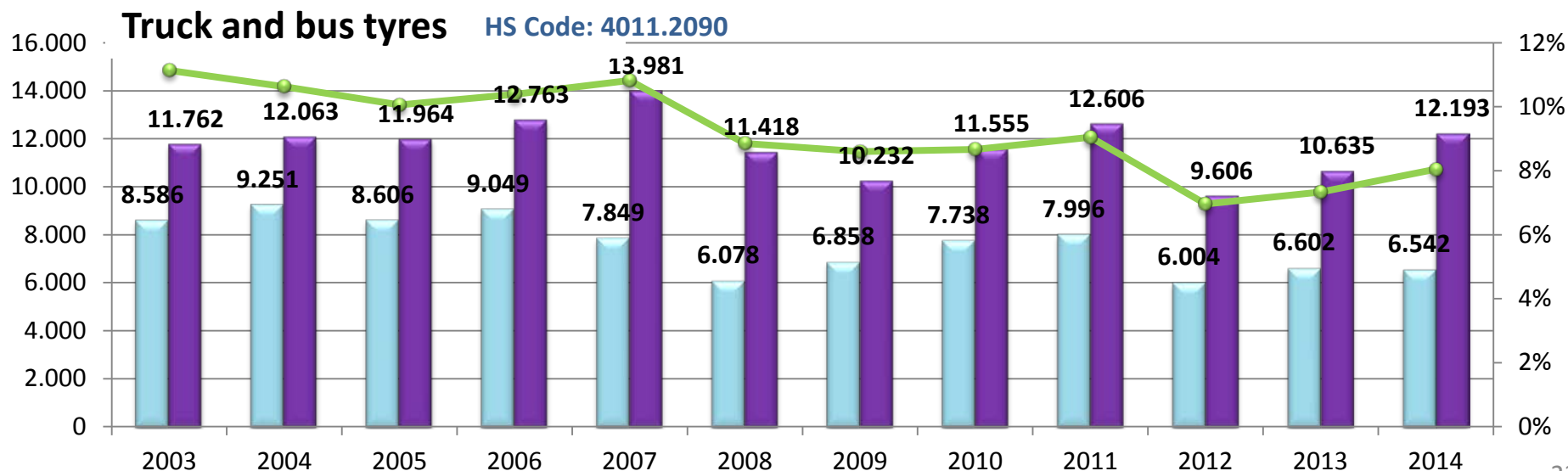
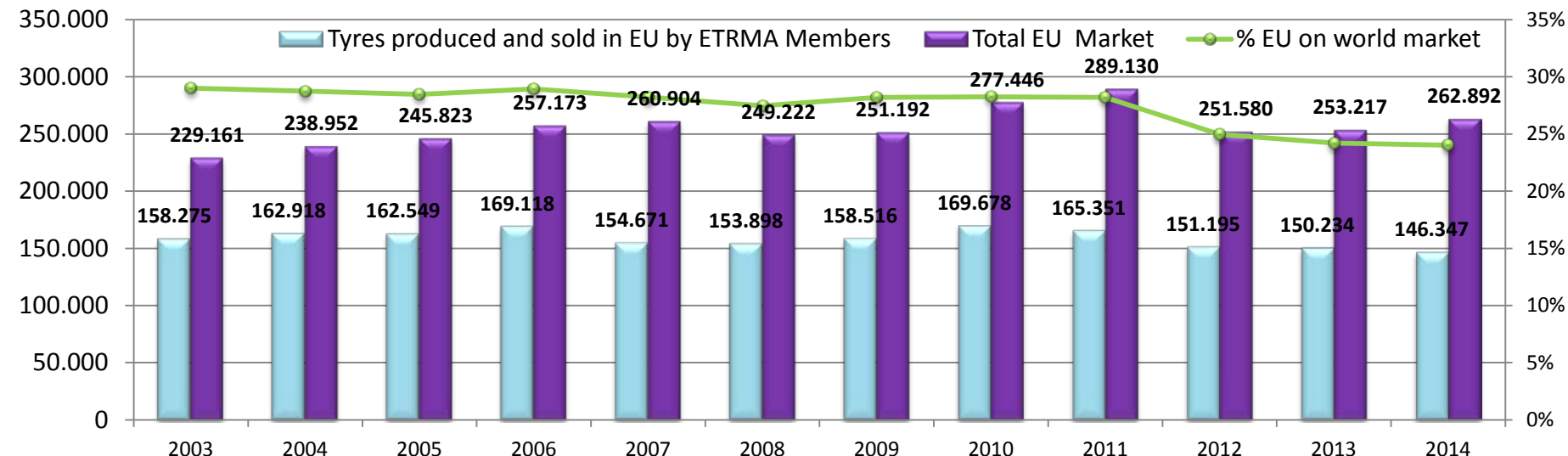


2013	2014	Company	Headquarter	2013 sales in €M	2014 sales in €M	Variation
1	1	Bridgestone ^(e)	Japan	21.573	21.300	↓ -1%
2	2	Michelin ^(e)	France	19.842	19.161	↓ -3%
3	3	Goodyear ^(e)	USA	14.216	14.939	↑ 5%
4	4	Continental ^(e)	Germany	9.583	9.784	↑ 2%
5	5	Pirelli	Italy	6.116	6.007	↓ -2%
7	6	Hankook	South Korea	4.947	5.041	↑ 2%
6	7	Sumitomo	Japan	4.840	5.035	↑ 4%
8	8	Yokohama	Japan	3.423	3.426	0%
9	9	Maxxis International	Taiwan	3.237	3.358	↑ 4%
13	10	Cooper Tires	USA	3.566	2.821	↓ -21%

Annual sales trends on the European tyre replacement market

Source: Europool and Eurostat/in 000 units

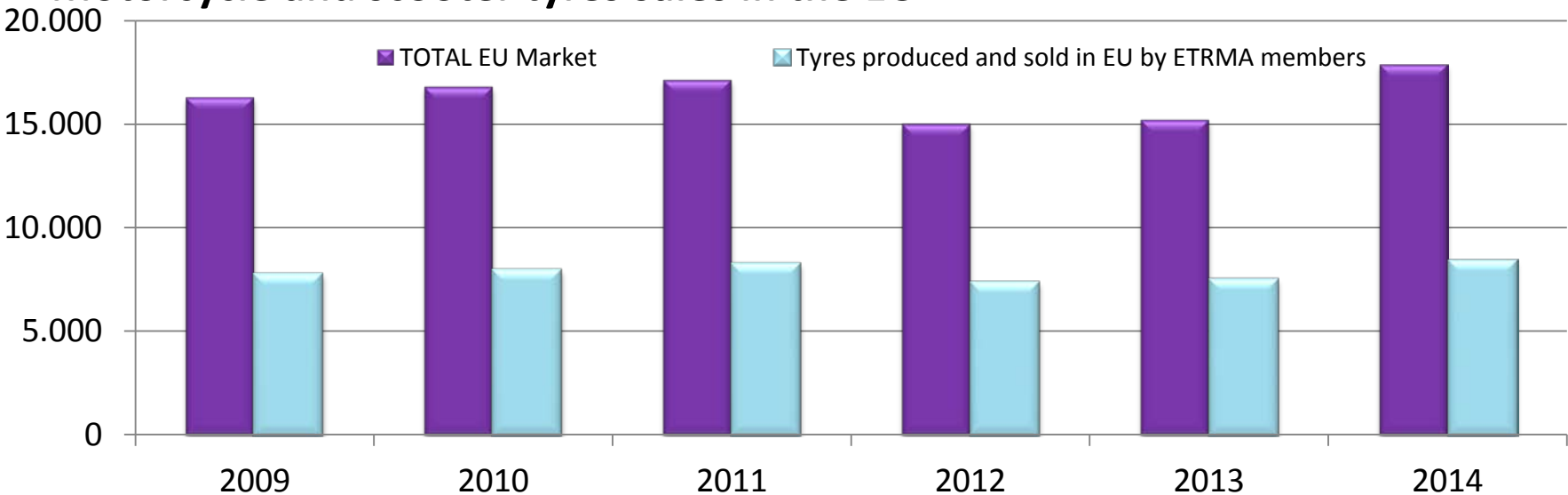
Cars and light truck tyres HSCode: 4011.1000; 40112010



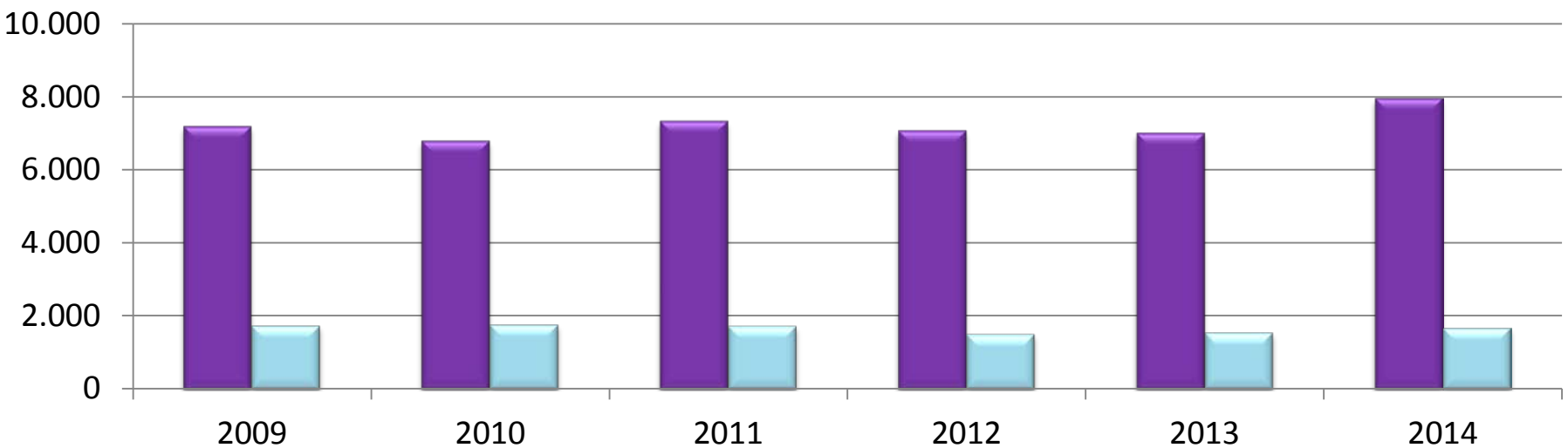
Europe Moto/Scooter and Agri Tyre Market

Source: Europool and Eurostat/ '000 units

Motorcycle and scooter tyres sales in the EU



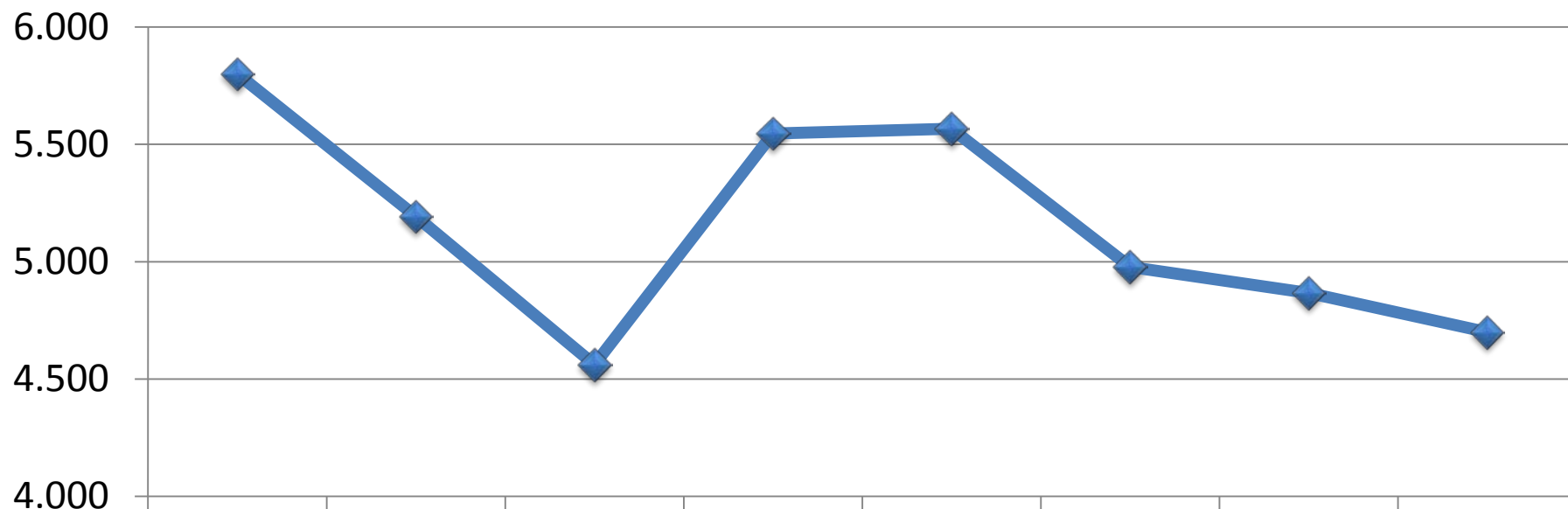
Agricultural tyres sales in the EU



Truck tyre Retreading market in Europe

Source: Europool / 000 units

Retreaded truck tyres

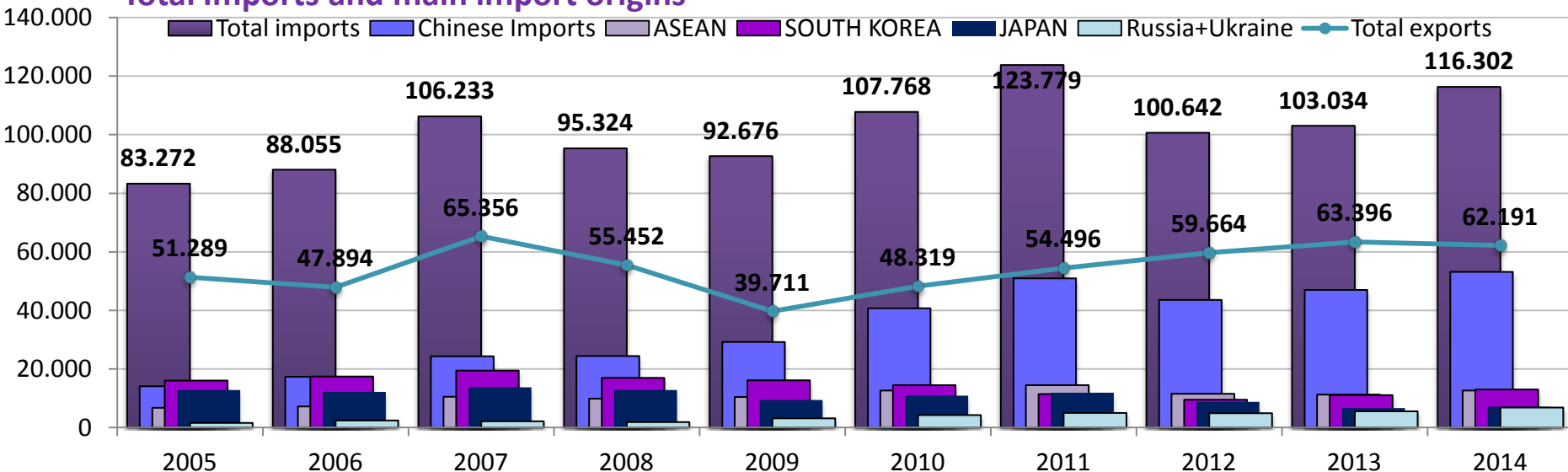


	2007	2008	2009	2010	2011	2012	2013	2014
Retreaded Truck Tyres	5.800	5.193	4.561	5.546	5.567	4.978	4.867	4.699

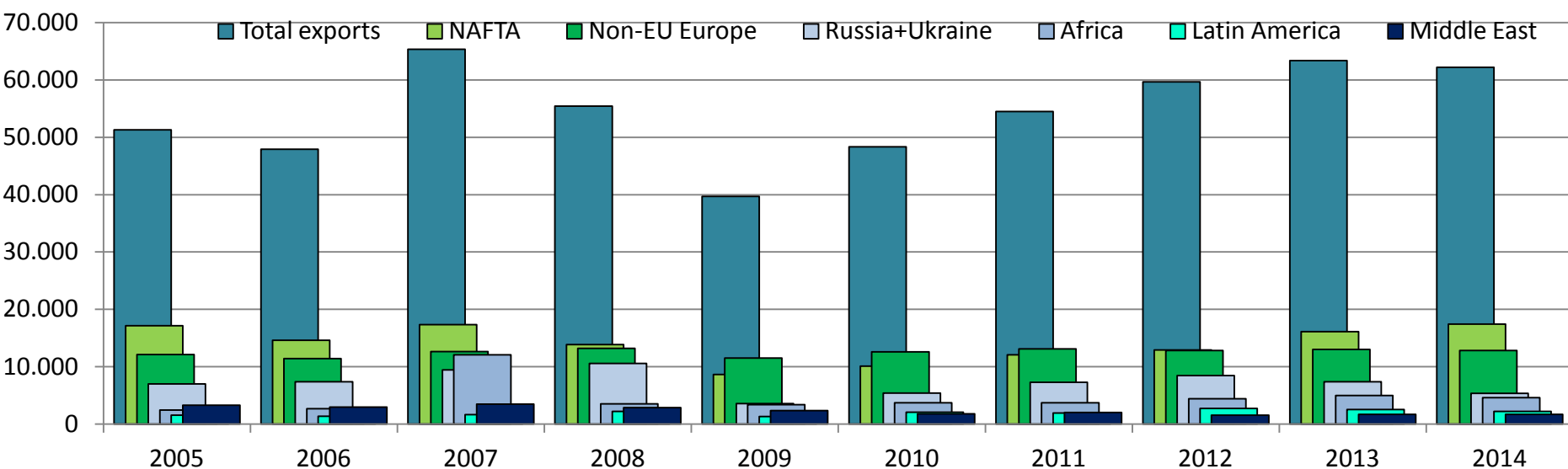
Import / export of passenger and light vehicles tyres

Source: Eurostat/ Trade in 000 units

Total Imports and main import origins



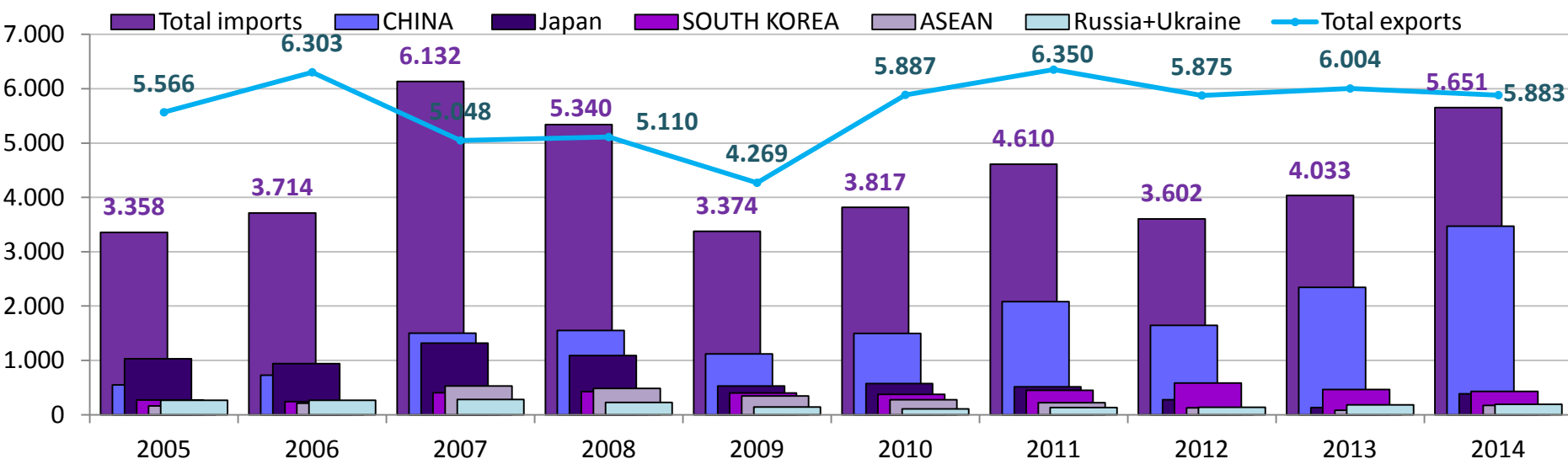
Total Exports and main export destinations



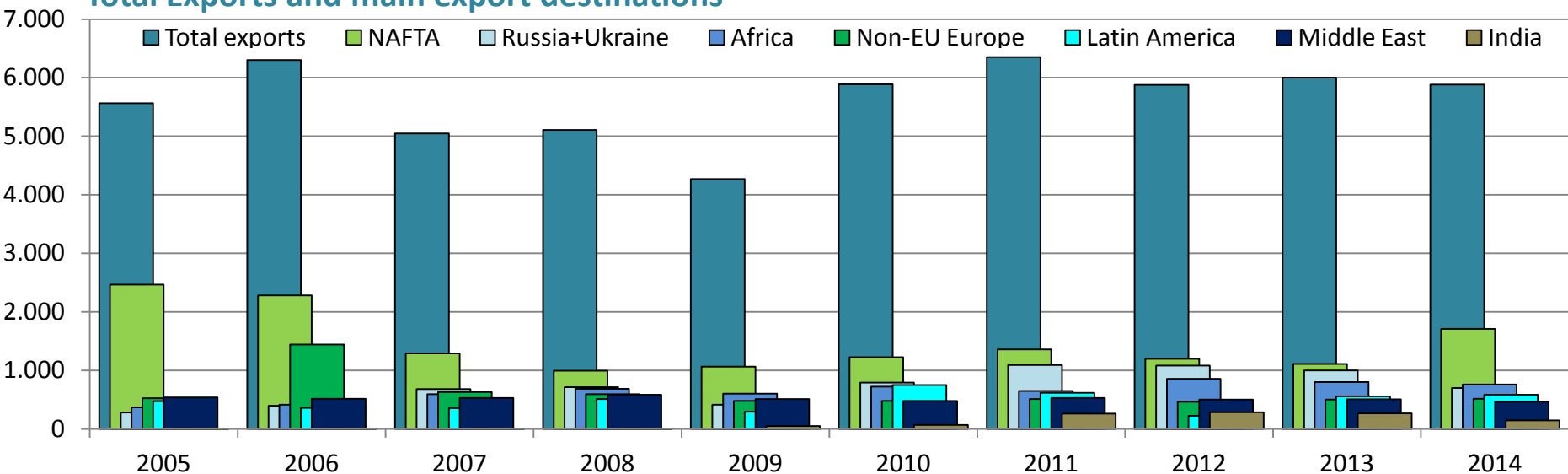
Import / export of truck tyres

Source: Eurostat/ Trade in 000 units

Total Imports and main import origin



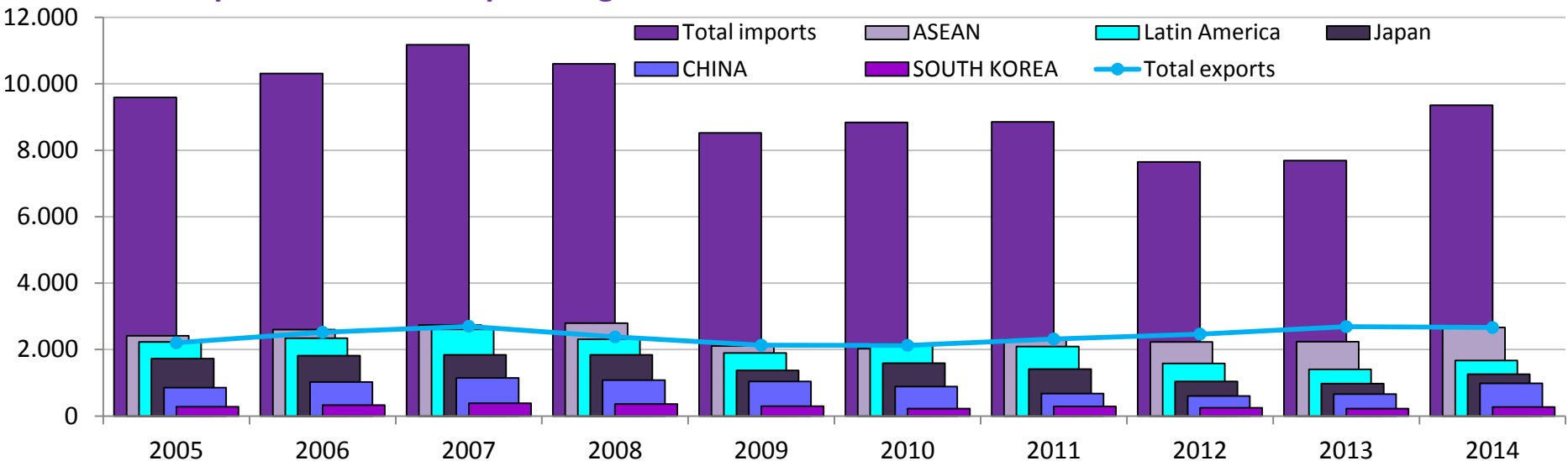
Total Exports and main export destinations



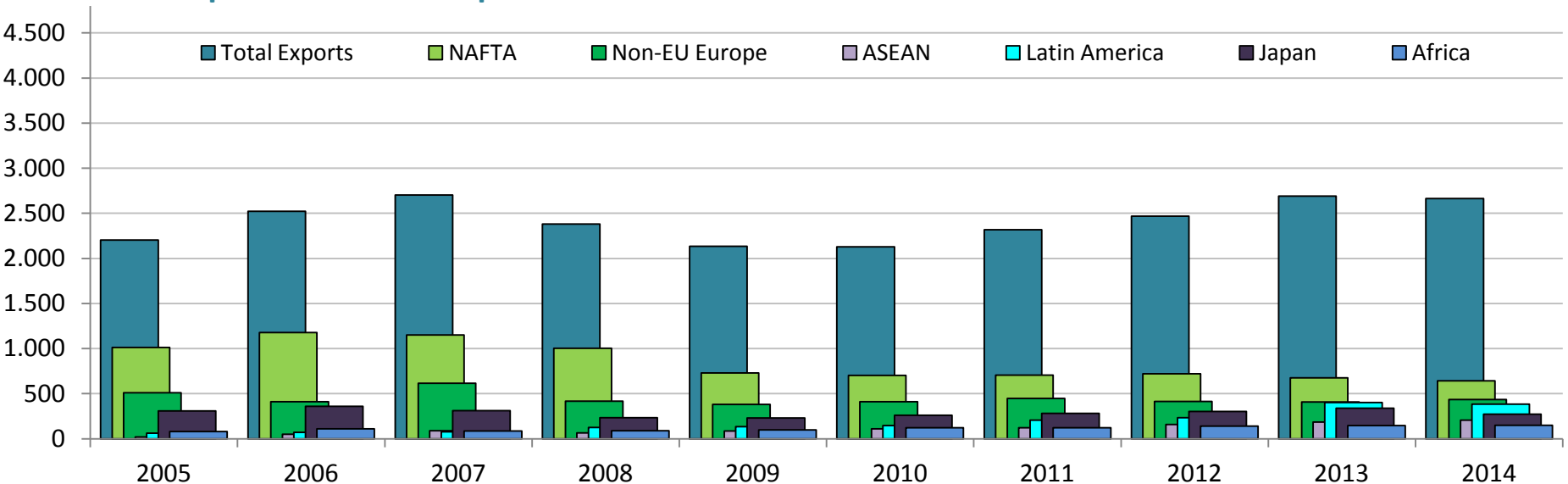
Import / export of moto/scooter tyres*

Source: Eurostat/ import and exports in 000 units *HS Code: 4011.4000 to 4011.4020 + 4011.4080 + 4011.4091 + 4011.4099

Total Imports and main import origin



Total Exports and main export destination

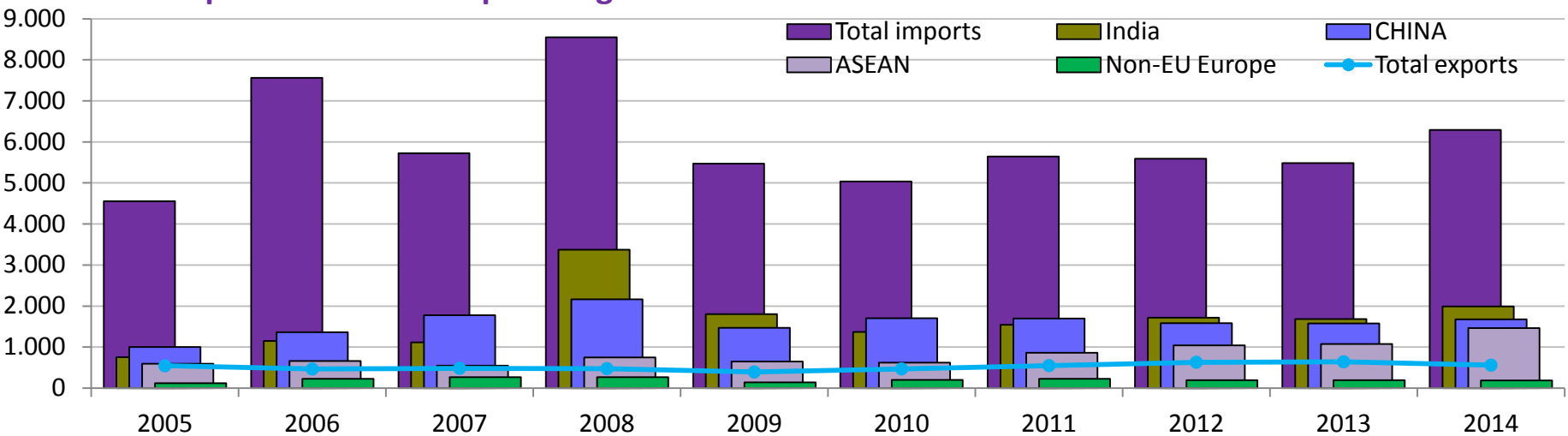


Import / export of agricultural tyres*

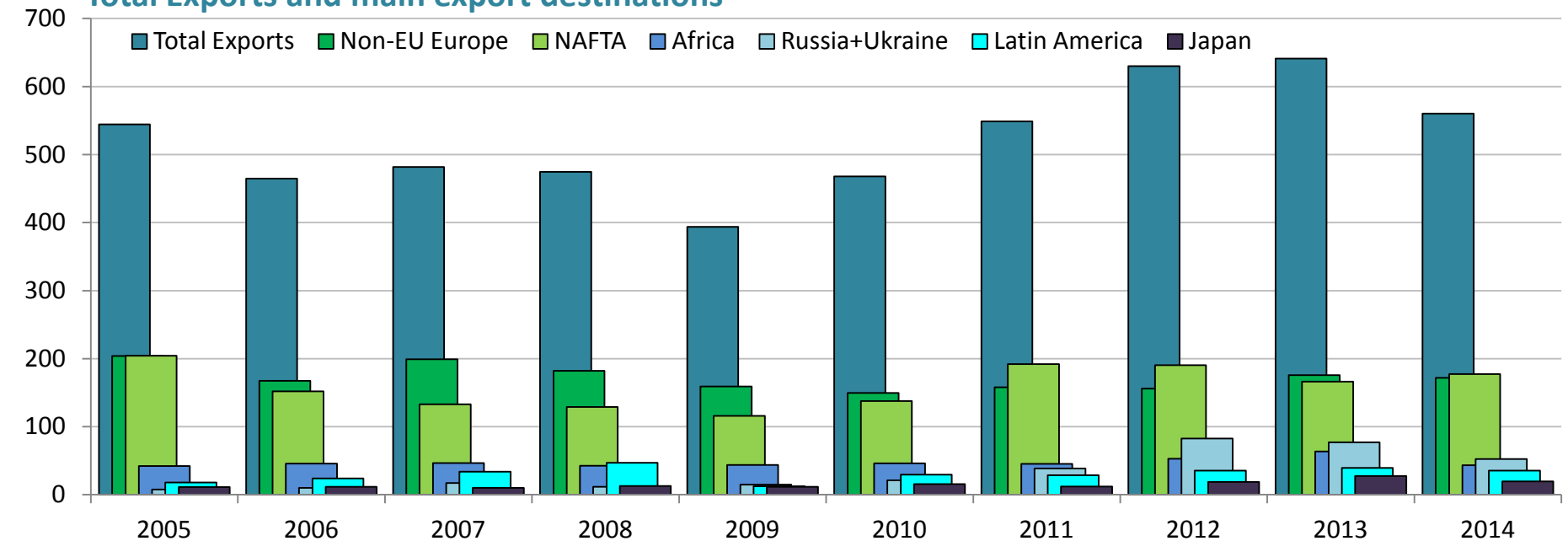
Source: Eurostat/ import and exports in 000 units

*HS Code: 4011.6100 and 4011.9200

Total Imports and main import origins



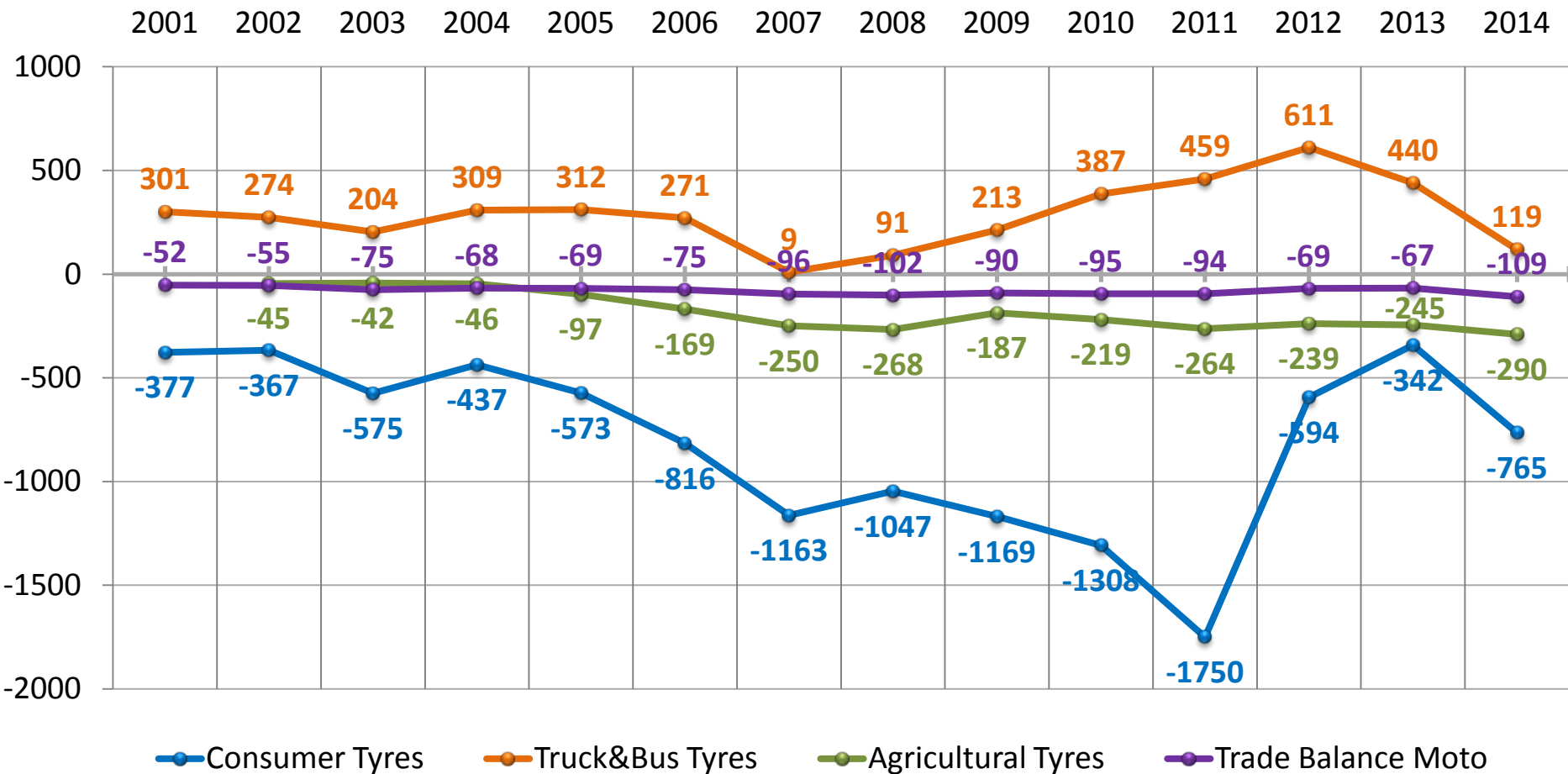
Total Exports and main export destinations



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

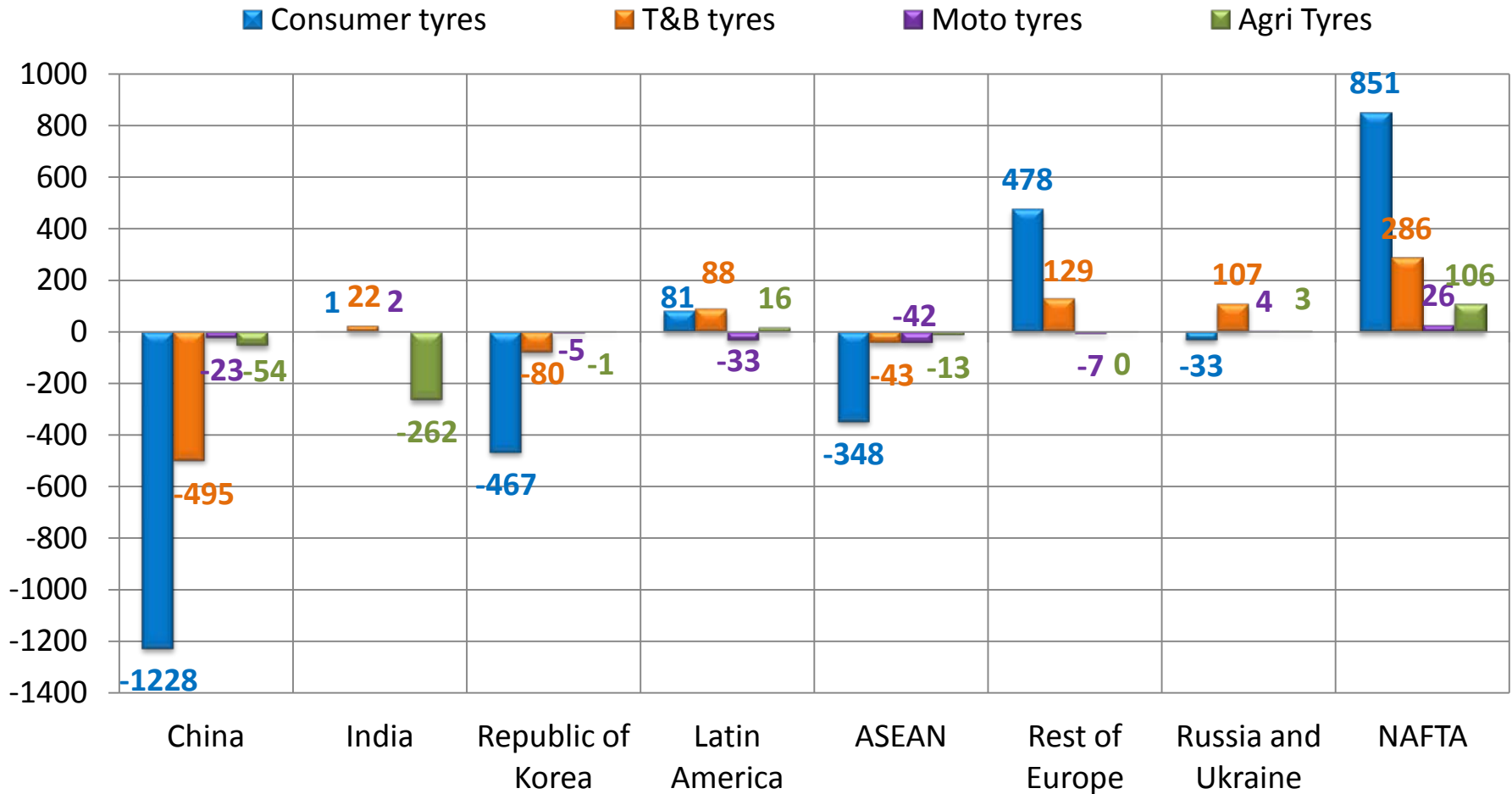
Evolution Trade Balance /tyre type



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

Trade Balance 2014/tyre type and commercial partner

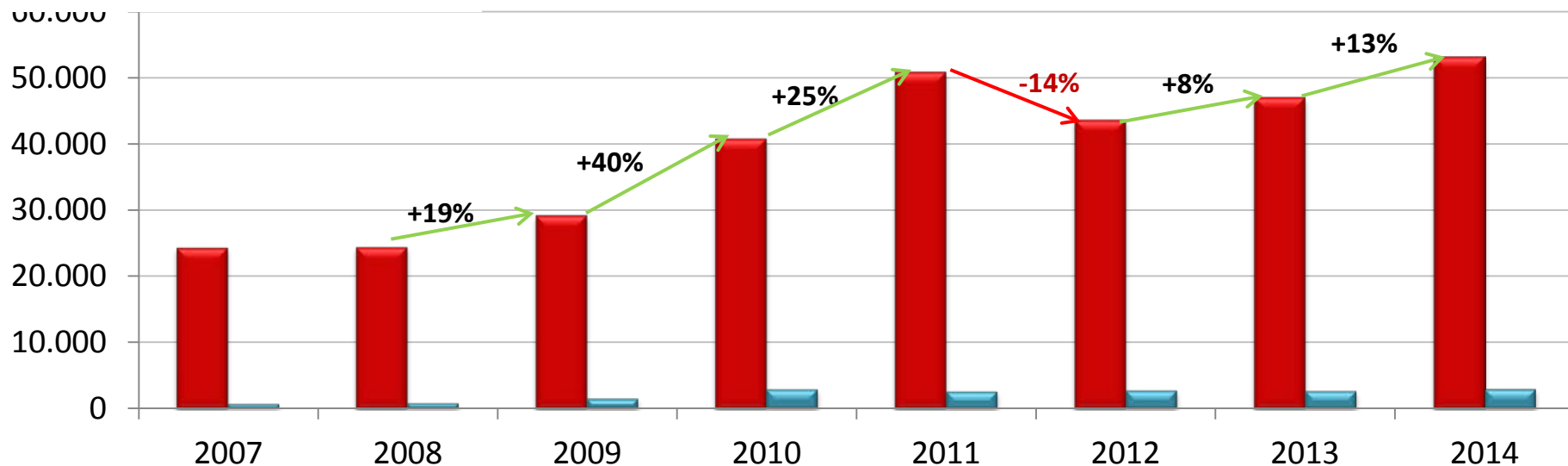


“Rest of Europe” includes the following countries: Albania, Bosnia, Switzerland, Croatia, Iceland, Moldova, Montenegro, Norway, Kosovo, Serbia, Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Liechtenstein.

Tyre Import / export with China

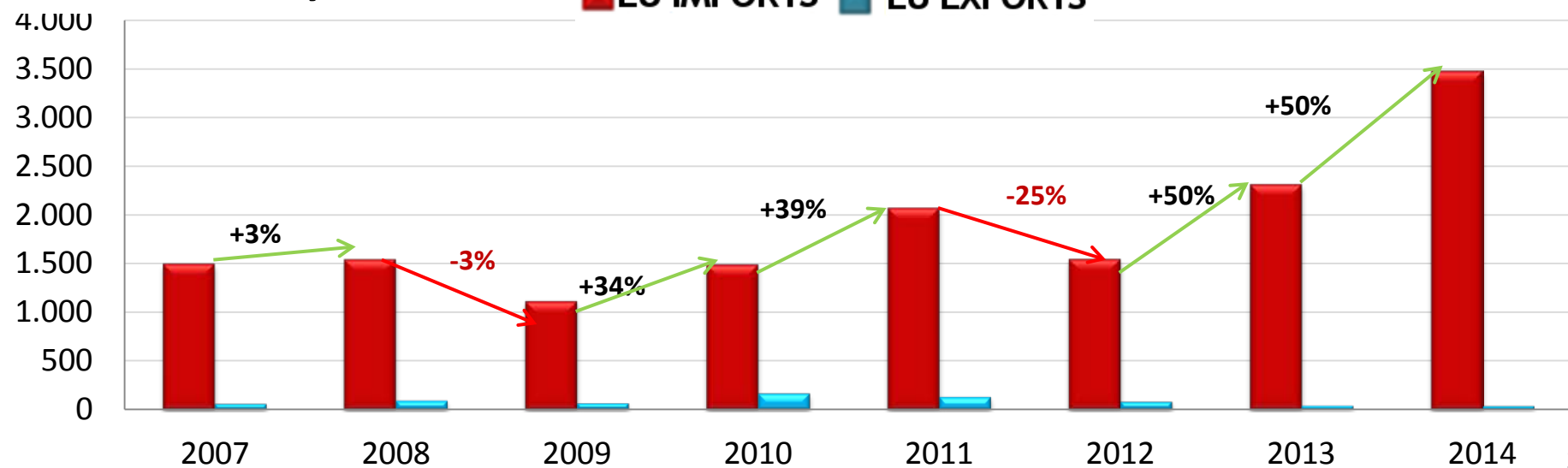
Source: Eurostat/000 units

Cars and light truck tyres



Truck and bus tyres

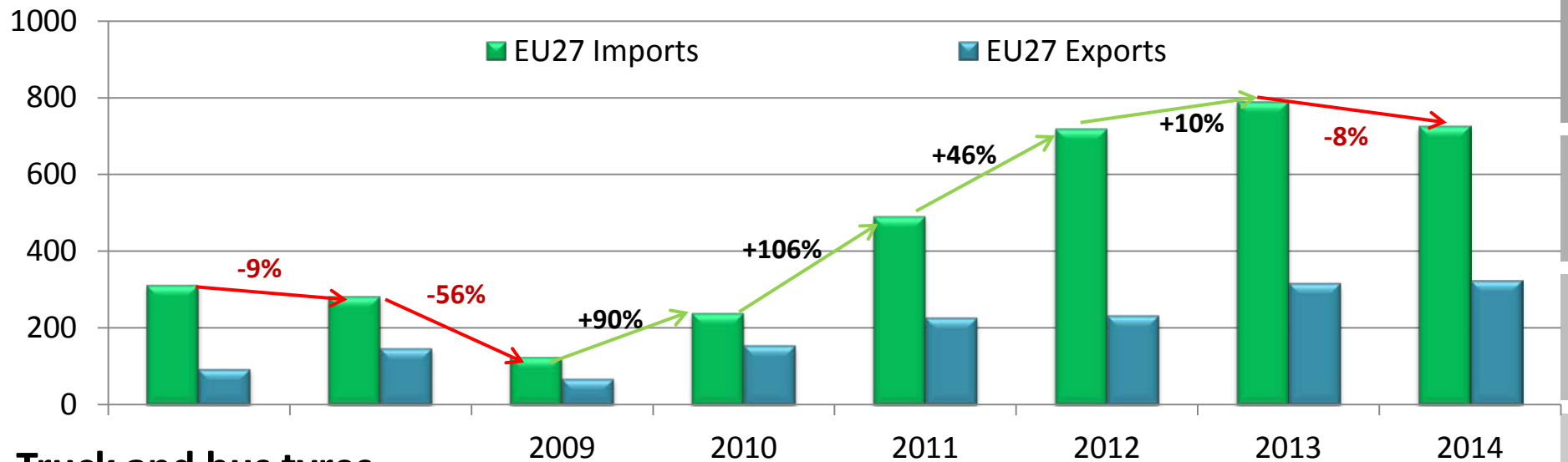
■ EU IMPORTS ■ EU EXPORTS



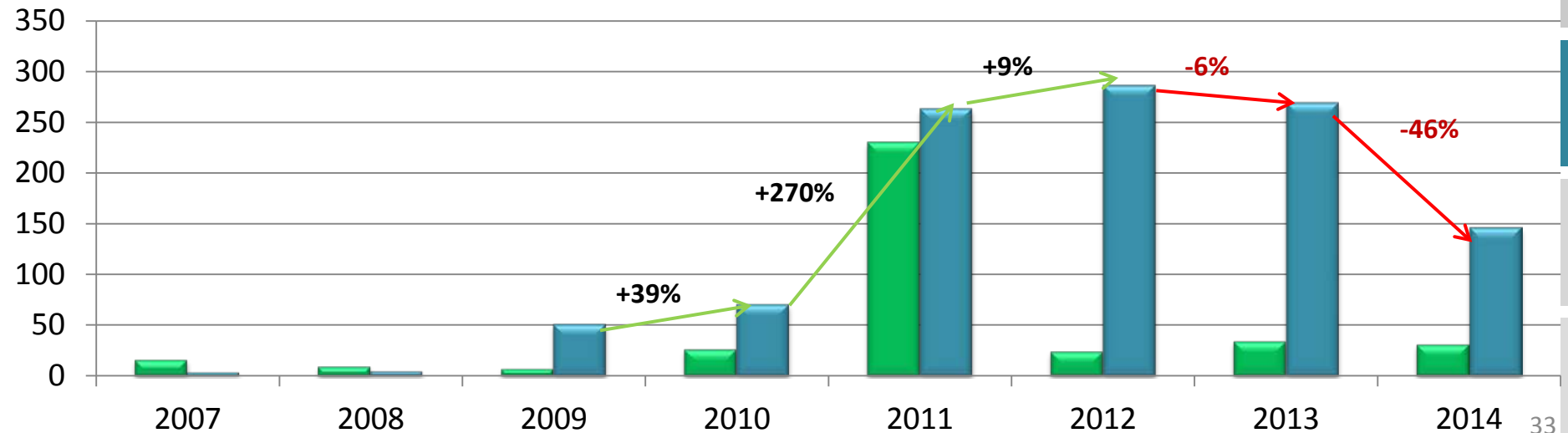
Tyre Import / export with India

Source: Eurostat/000 units

Cars and light truck tyres



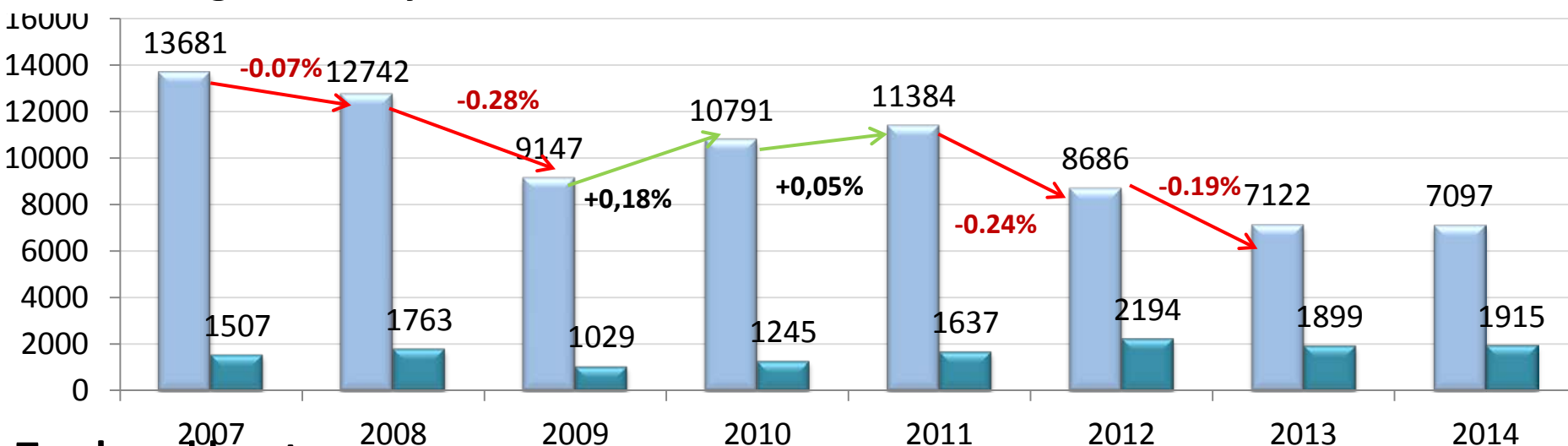
Truck and bus tyres



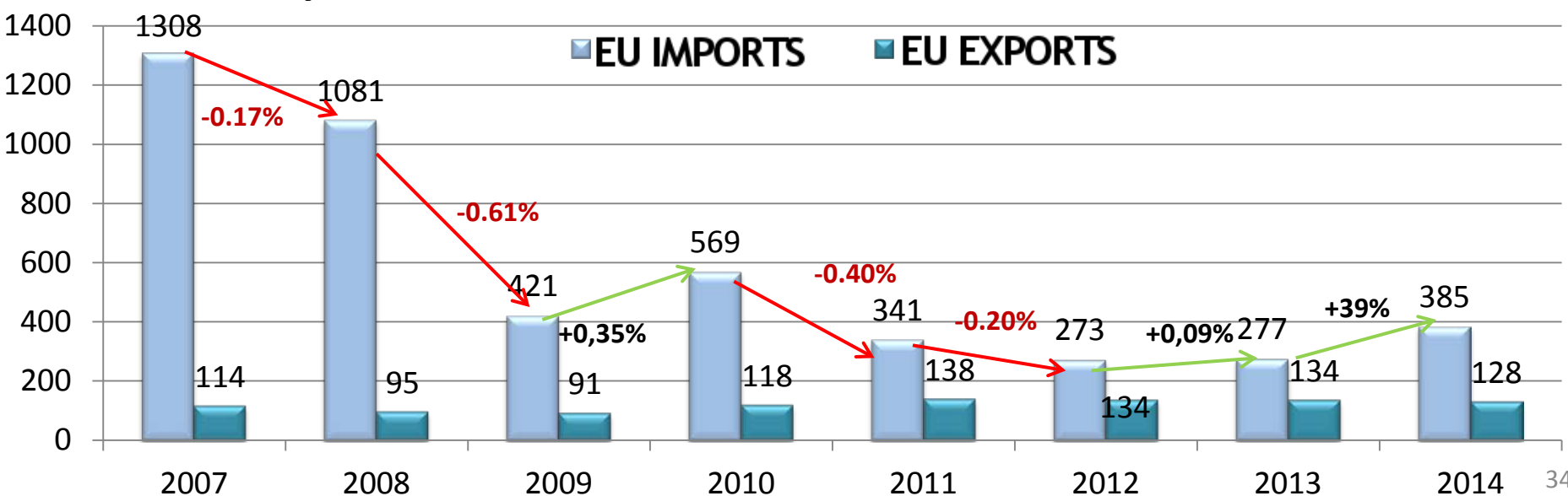
Tyre Import / export with Japan

Source: Eurostat/000 units

Cars and light truck tyres



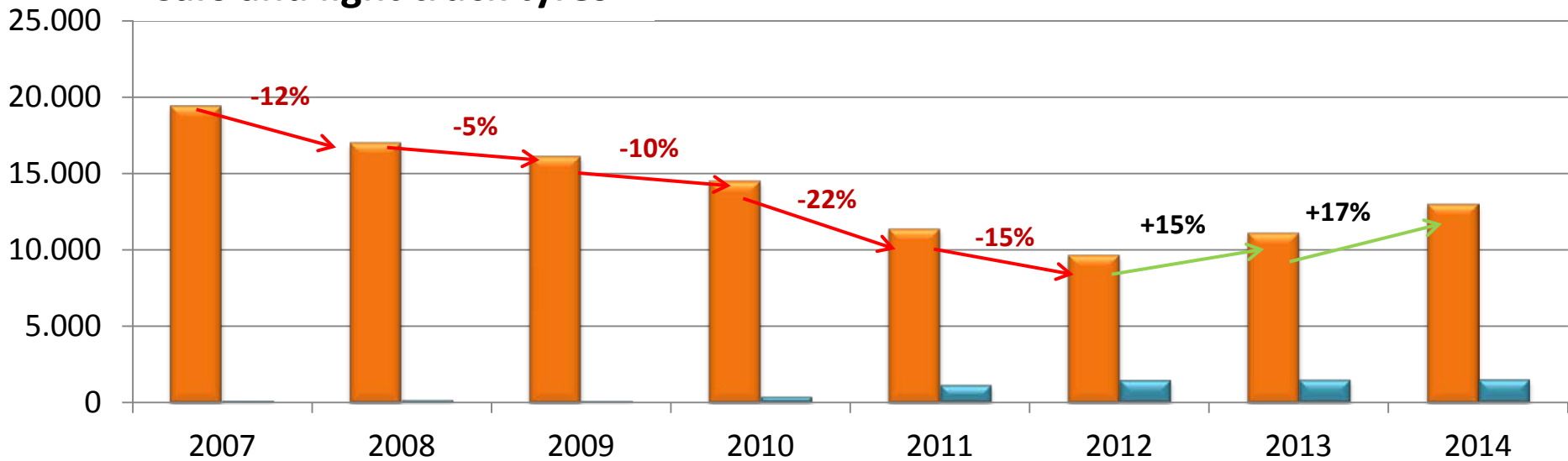
Truck and bus tyres



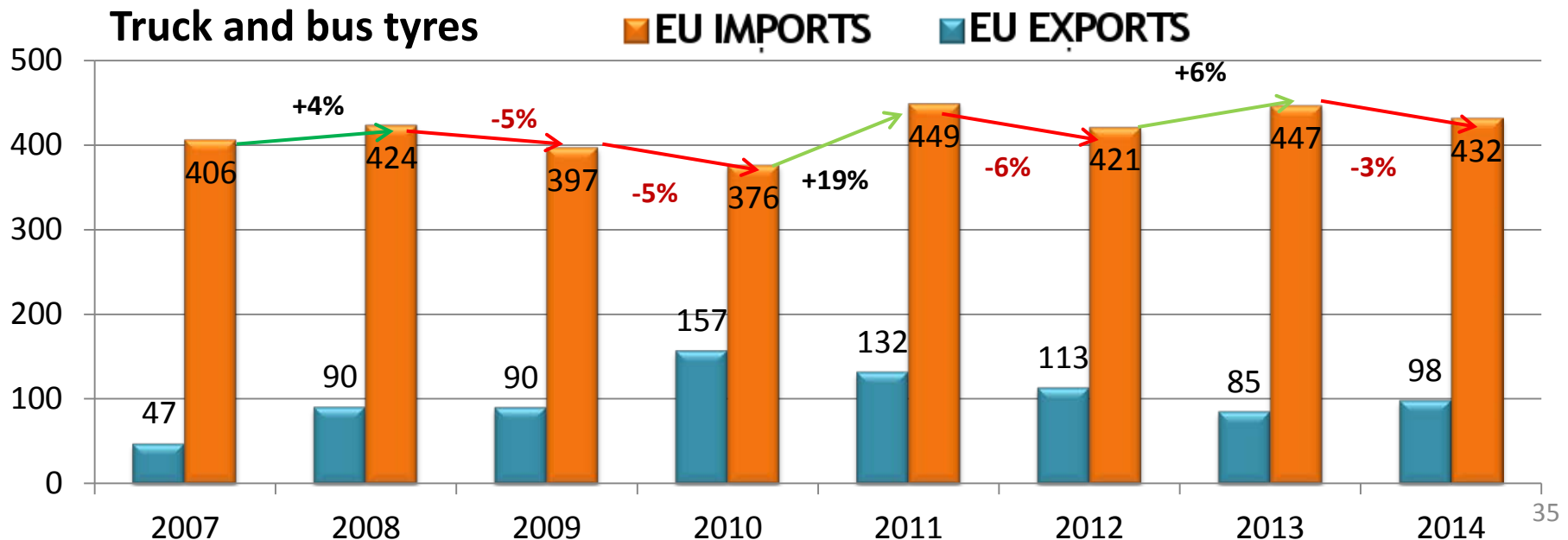
Tyre Import / export with Republic of Korea

Source: Eurostat/000 units

Cars and light truck tyres



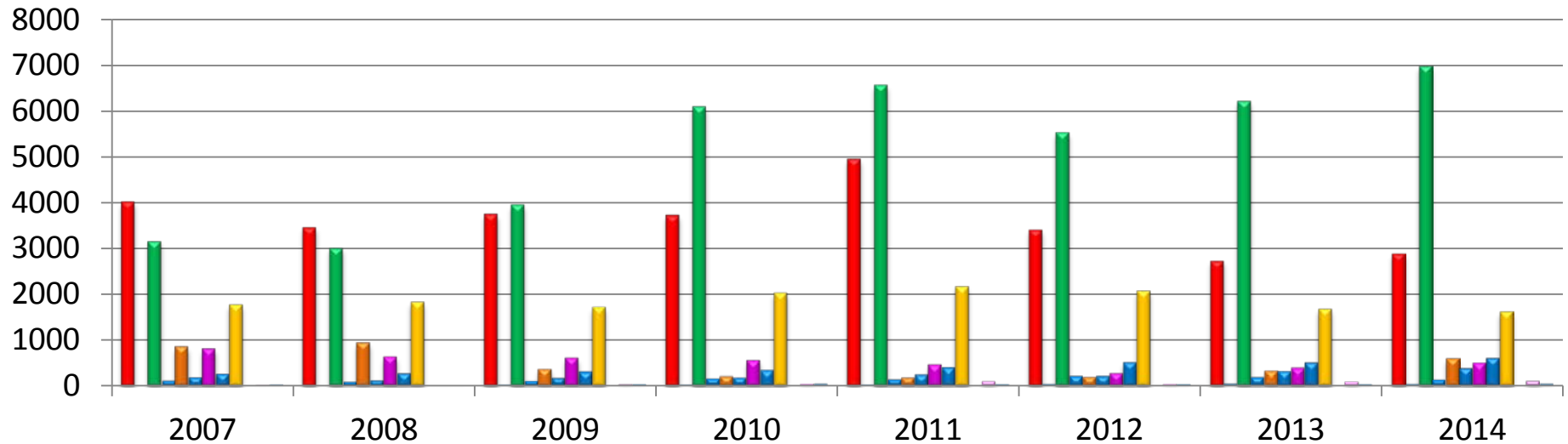
Truck and bus tyres



Tyre Import / export with ASEAN

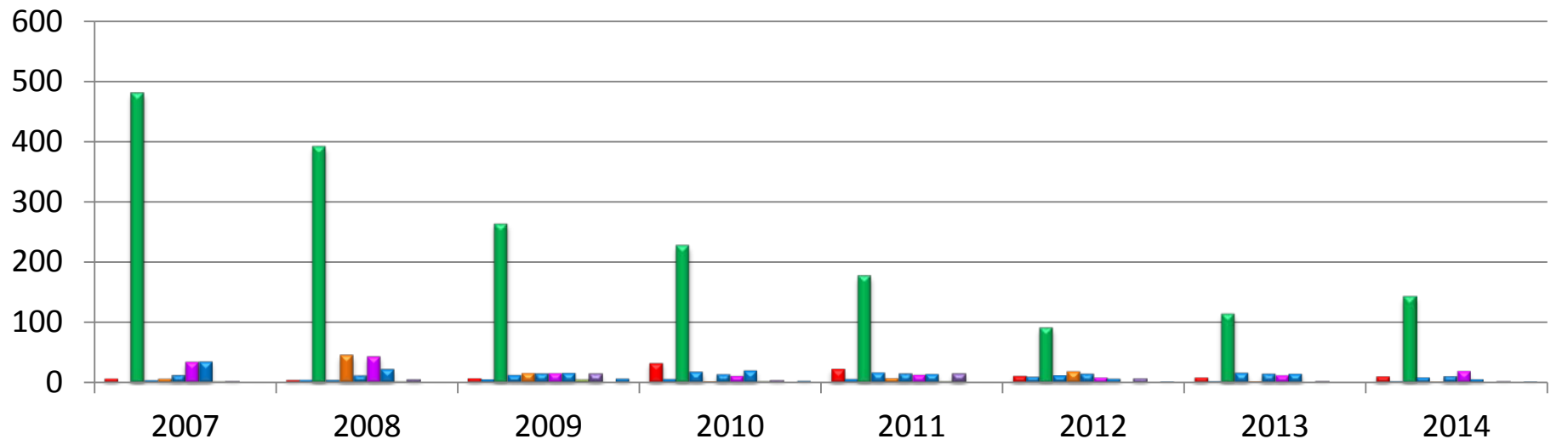
Source: Eurostat/000 units – EU28

Cars and light truck tyres



Truck and bus tyres

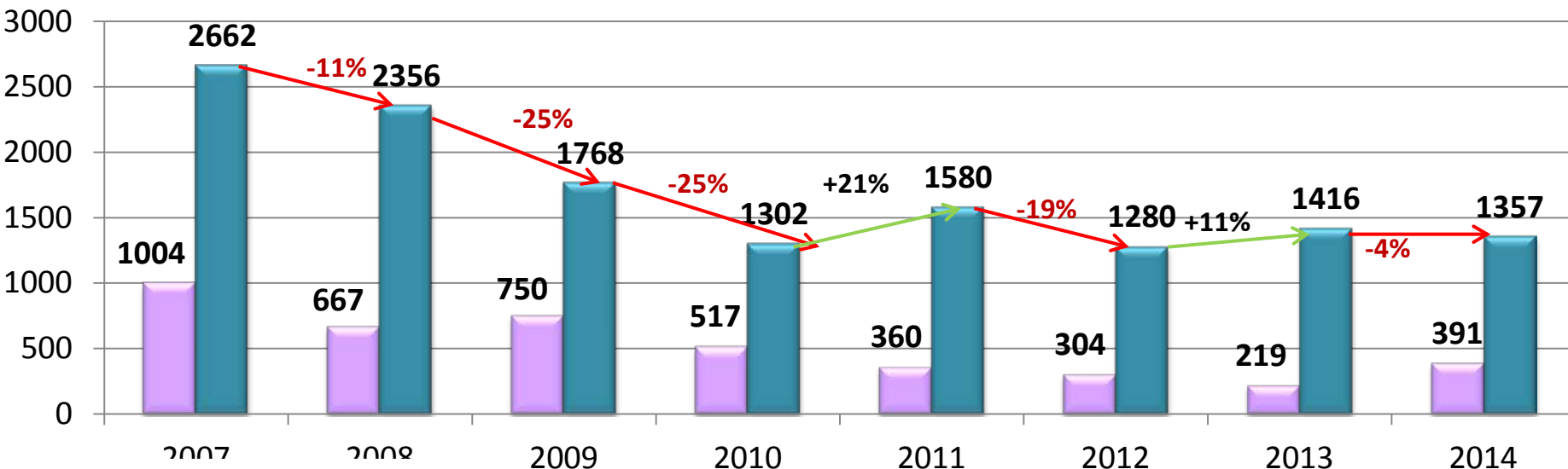
■ Imports Indonesia ■ Imports Thailand ■ Imports Malaysia ■ Imports Singapore ■ Imports Philippines ■ Imports Vietnam
■ Exports Indonesia ■ Exports Thailand ■ Exports Malaysia ■ Exports Singapore ■ Exports Philippines ■ Exports Vietnam



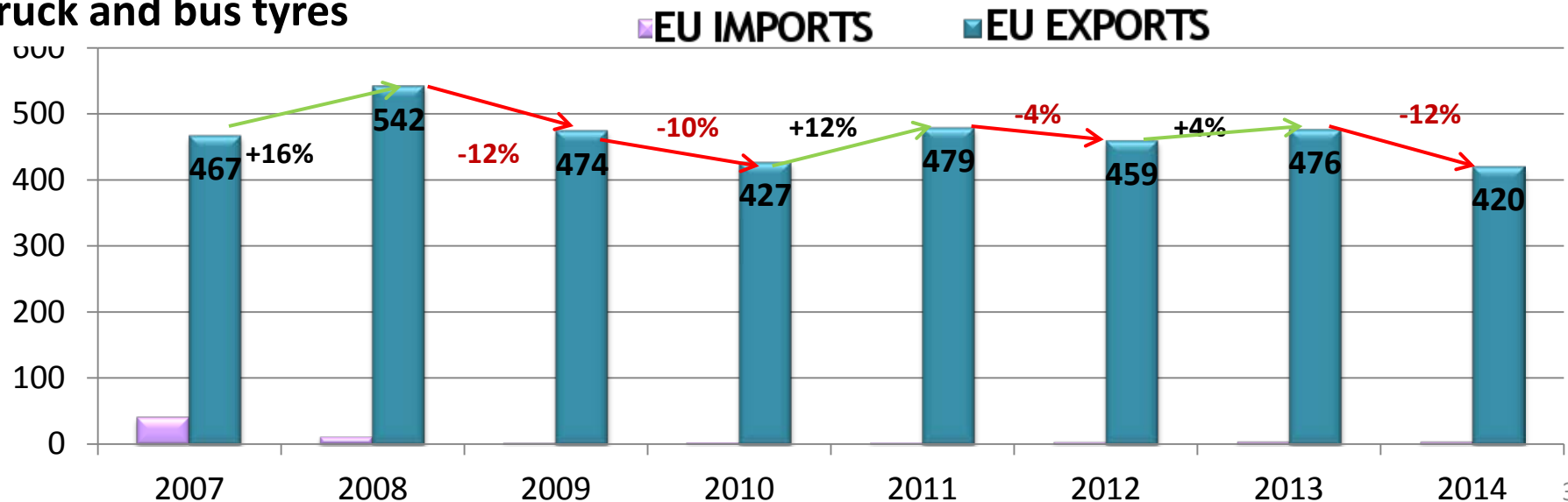
Tyre Import / export with GCC

Source: Eurostat/000 units

Cars and light truck tyres



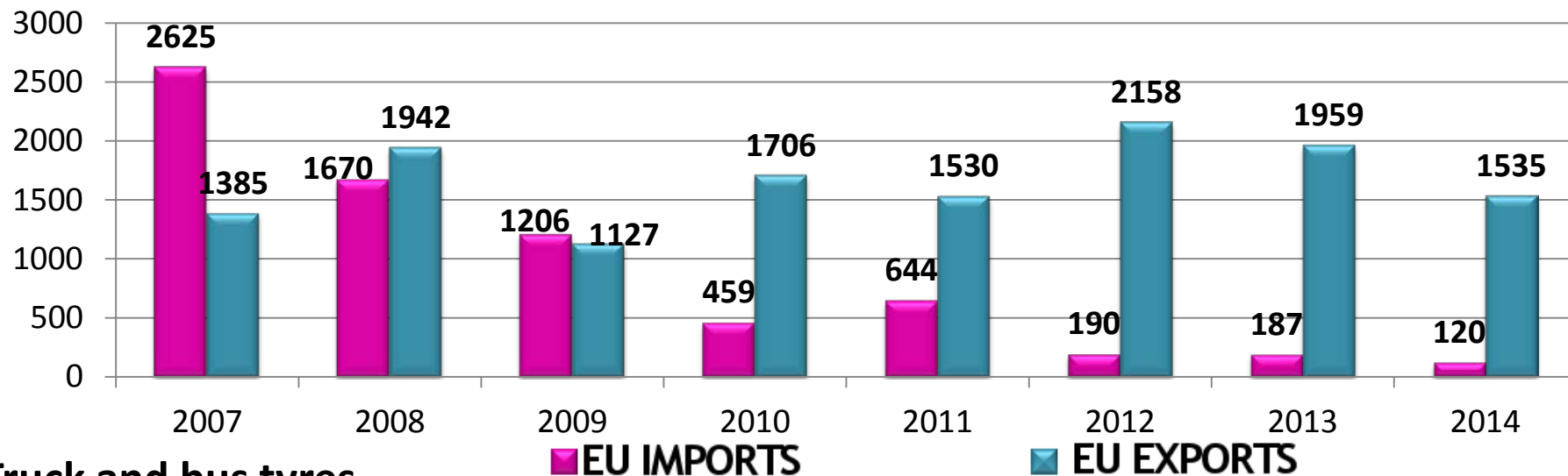
Truck and bus tyres



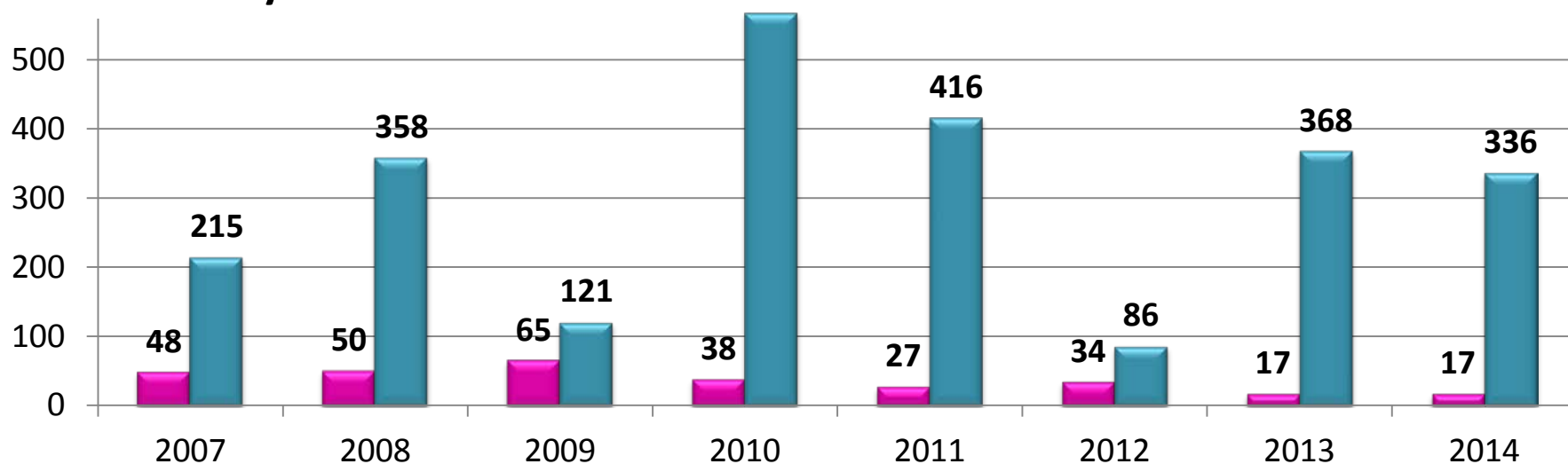
Tyre Import / export with Mercosur

Source: Eurostat/000 units

Cars and light truck tyres



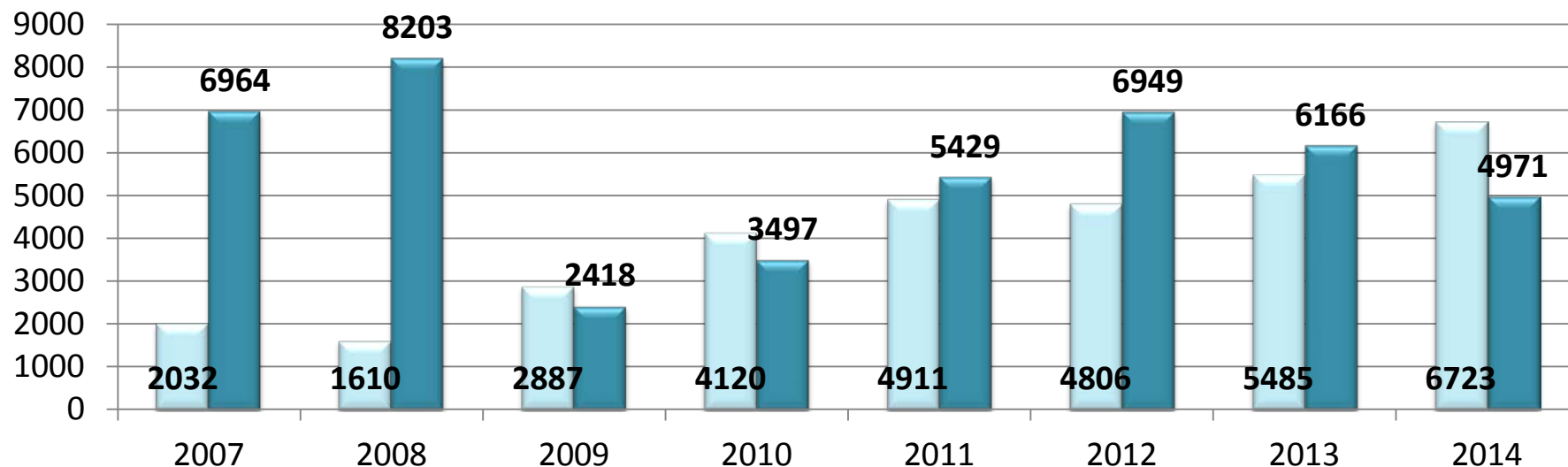
Truck and bus tyres



Tyre Import / export with Russia

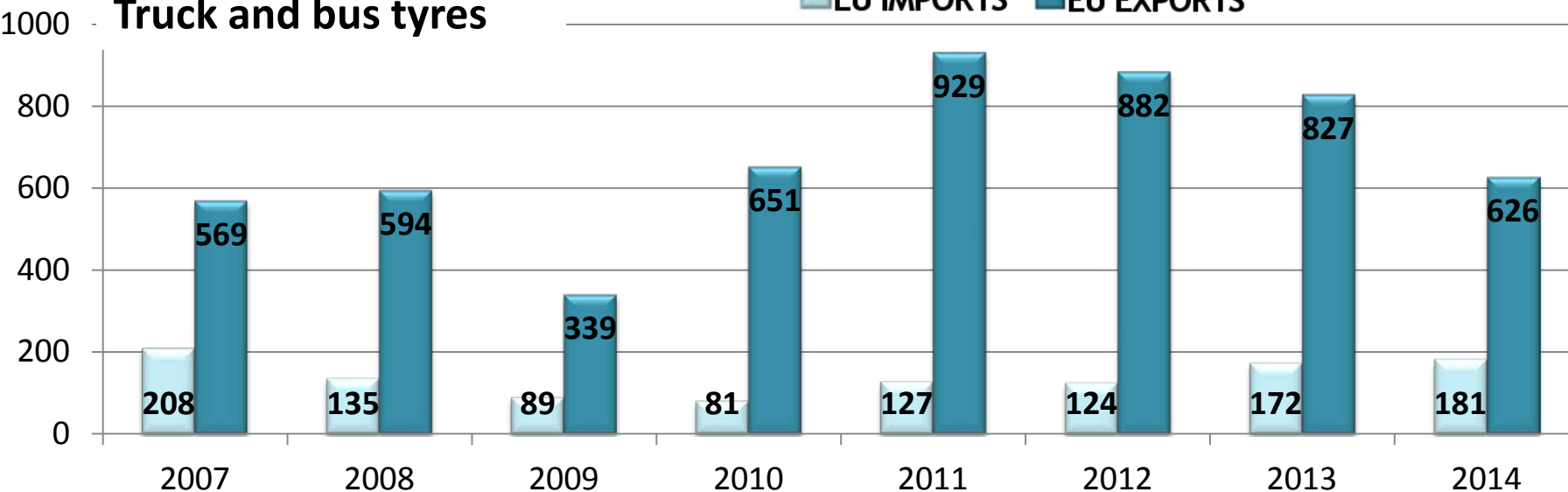
Source: Eurostat/000 units

Cars and light truck tyres



■ EU IMPORTS ■ EU EXPORTS

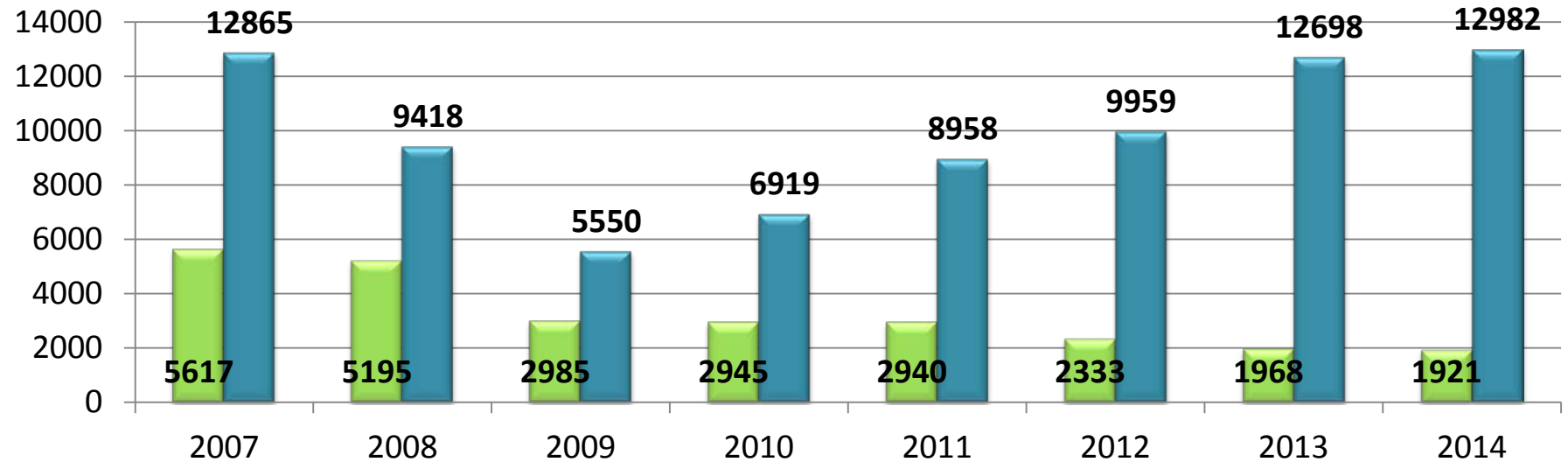
Truck and bus tyres



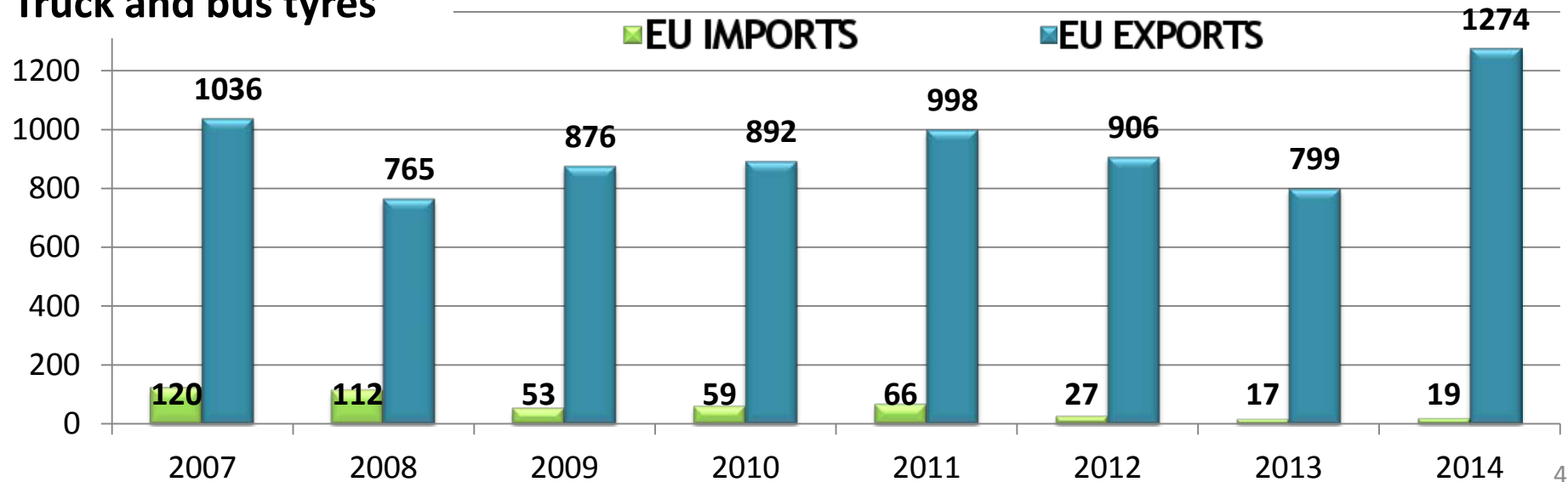
Tyre Import / export with US

Source: Eurostat/000 units

Cars and light truck tyres



Truck and bus tyres



RUBBER

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2013 and
beyond

GENERAL RUBBER GOODS Production
and Trade

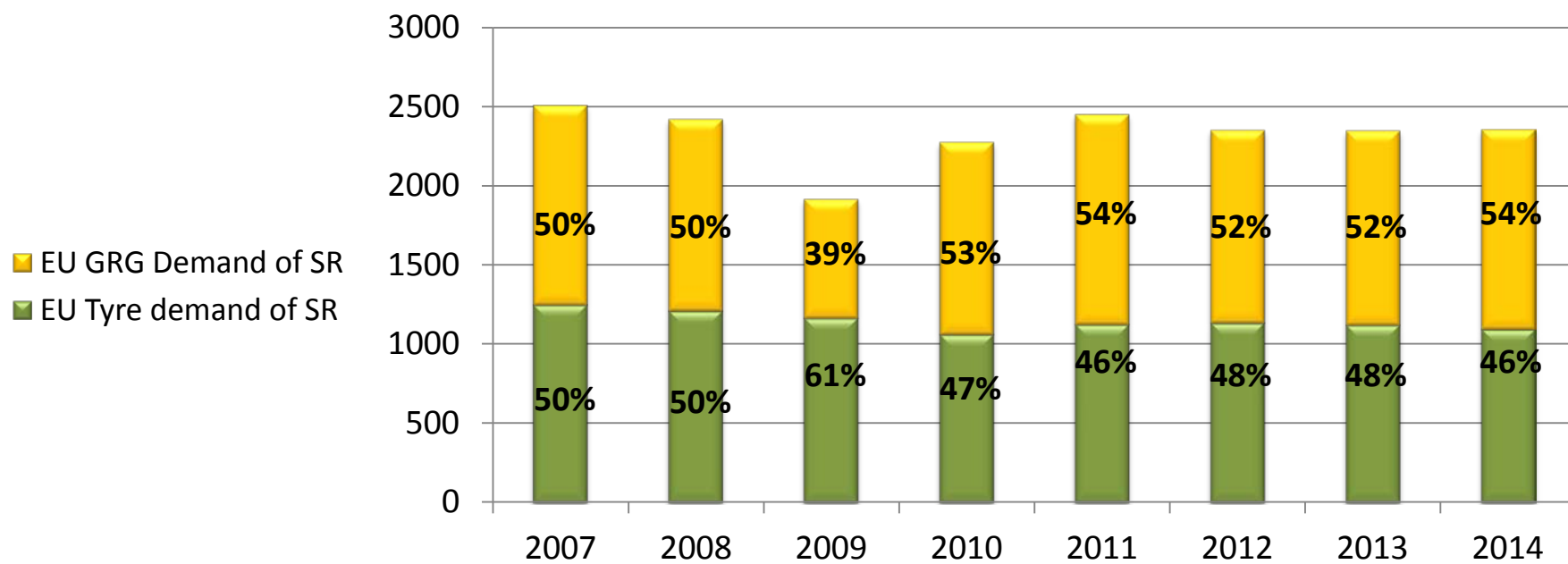
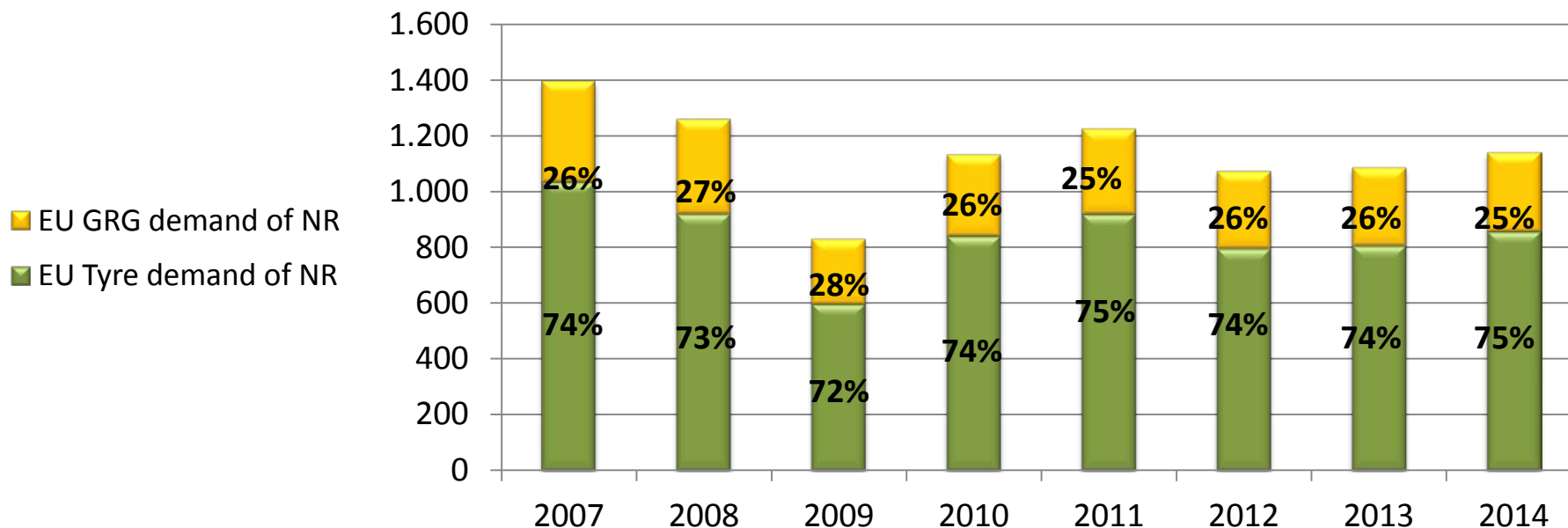
TYRES: Production, New and Retread
Sales, Trade and End of Life

RUBBER

Appendix: Export and Import Tariffs

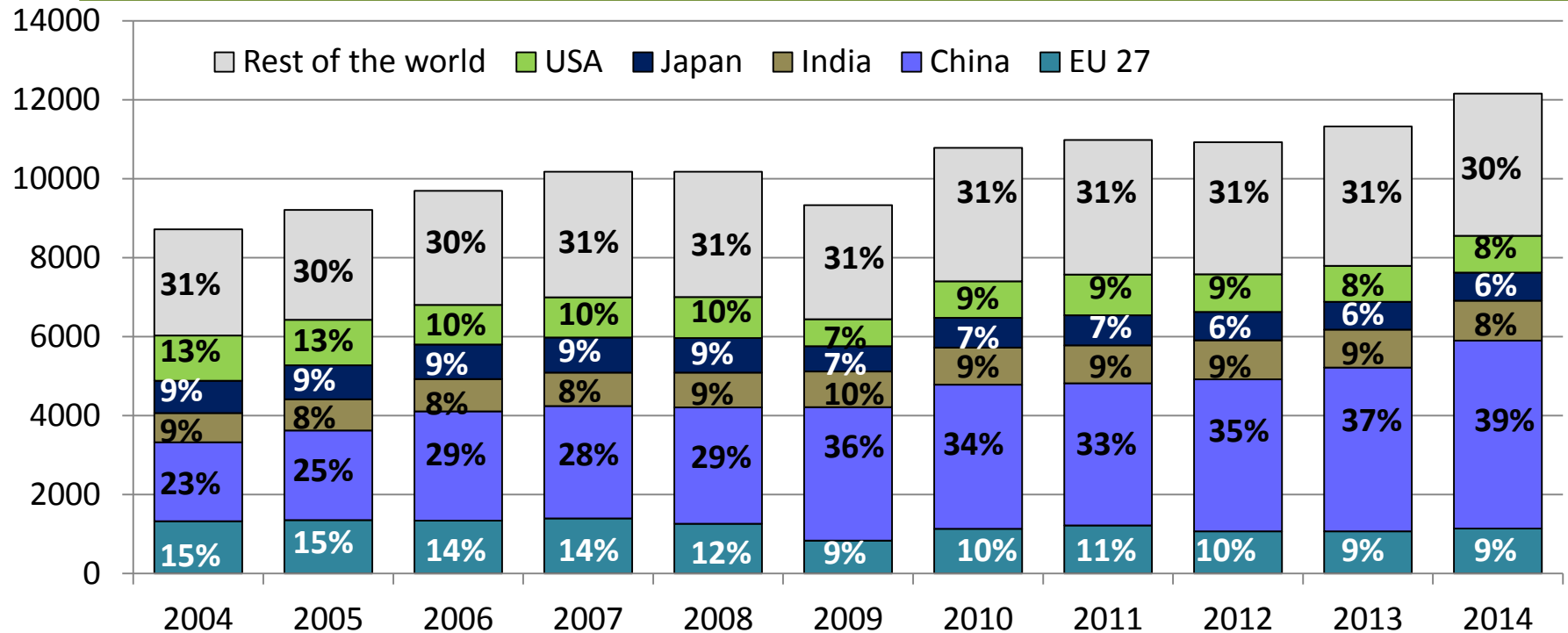
EU Total and breakdown of consumption of rubber

Source: IRSG /000 tonnes

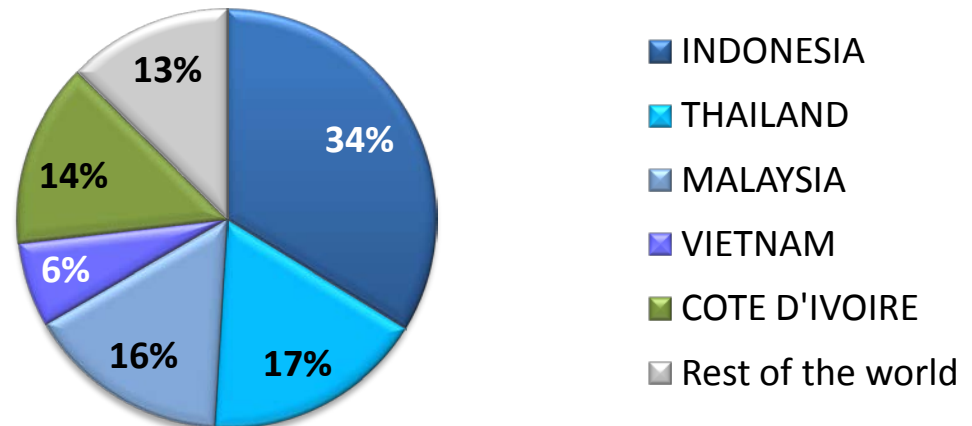


Natural rubber consumption in key countries

Source: IRSG/000 tonnes

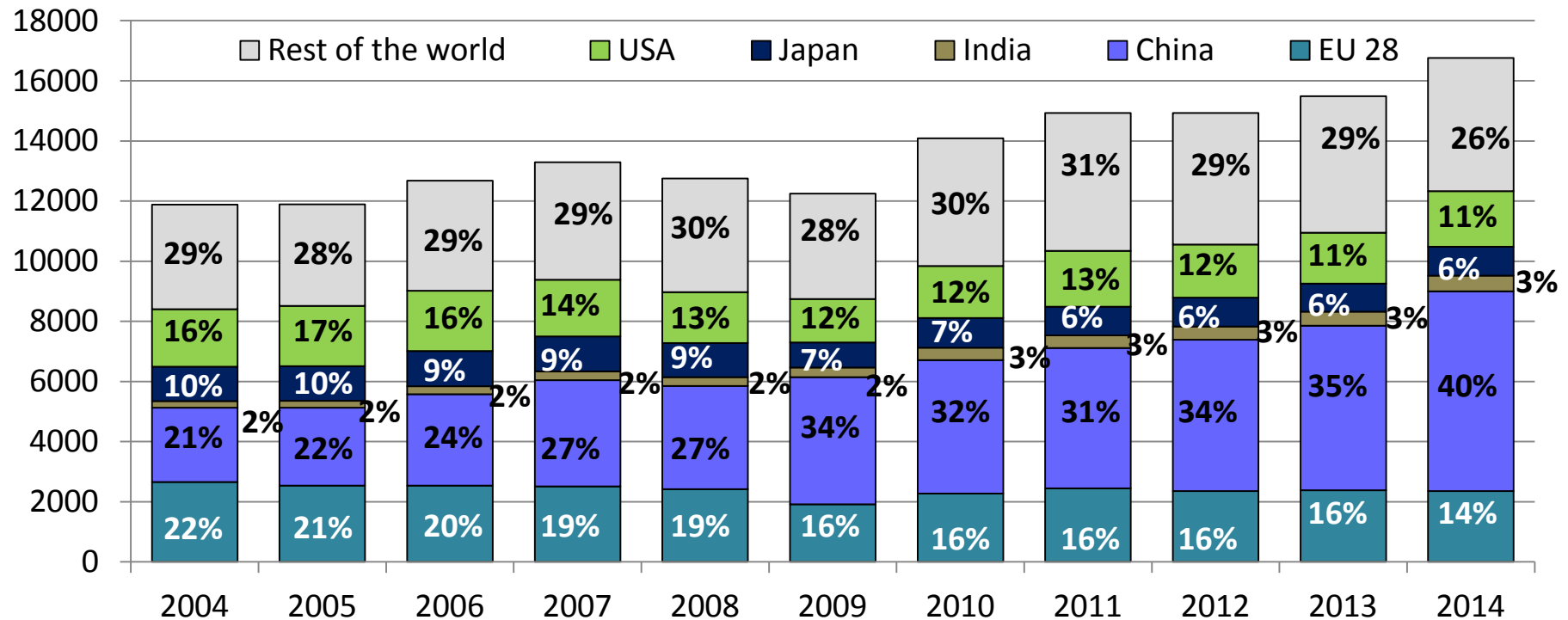


EU Imports of Natural Rubber 2014



Synthetic rubber consumption in key countries

Source: IRSG/000 tonnes



Appendix: Export and Import Tariffs

ETRMA

2013/2014 Key Figures

VEHICLE DATA from 2008 to 2013 and
beyond

GENERAL RUBBER GOODS Production
and Trade

TYRES: Production, New and Retread
Sales, Trade and End of Life

RUBBER

Appendix: Export and Import Tariffs

Export and import tariffs for tyres

Source: export duties, www.madb.europa.eu; import tariffs, TARIC database

When exporting from the EU to the trading partner country

Code	Products	Argentina	Brazil	Canada	China	Colombia	India	Indonesia	Japan	Korea	Malaysia	Paraguay	Peru	Russia	Singapore	Thailand	Ukraine	Uruguay	USA	Vietnam
4011.10	Car Tyres	35%	16%	7% ¹	10%	10%	10%	15%	0%	0%	40%	5%	0%	14% ²	0%	10%	0-10%	16%	3.4-4%. ¹	25%
4011.20	MHV Tyres	16-35%	16%	7% ¹	3-10%	10%	10%	15%	0%	0%	40%	10%	0%	10%	0%	10%	7%	16%	3.4-4%. ¹	25%
4011.40	Moto Tyres	35%	16%	0%	15%	0%	10%	15%	0%	0%	30%	16%	0%	5%	0%	10%	10%	16%	0%	35%
4011.61/92	Agro Tyres	16%	16%	0%	6-25%	10-0%	10%	15%	0%	0%	30%	16%	0%	5%	0%	10%	10%	16%	0%	15-20%

¹ Of Free-on-Board (FOB) value

² But not less than €4.34/unit

When importing from the trading partner country to the EU

Code	Products	Argentina	Brazil	Canada	China	Colombia	India ¹	Indonesia ¹	Japan	Korea	Malaysia	Paraguay ¹	Peru	Russia	Singapore	Thailand	Ukraine ¹	Uruguay	USA	Vietnam ¹
4011.10	Car Tyres	4.5%	4.5%	4.5%	4.5%	0%	0%	0%	4.5%	0%	4.5%	0%	0%	4.5%	4.5%	4.5%	0%	4.5%	4.5%	0%
4011.20	MHV Tyres	4.5%	4.5%	4.5%	4.5%	0%	0%	0%	4.5%	0%	4.5%	0%	0%	4.5%	4.5%	4.5%	0%	4.5%	4.5%	0%
4011.40	Moto Tyres	4.5%	4.5%	4.5%	4.5%	0%	0%	0%	4.5%	0%	4.5%	0%	0%	4.5%	4.5%	4.5%	0%	4.5%	4.5%	0%
4011.61/92	Agro Tyres	4%	4%	4%	4%	0%	0%	0%	4%	0%	4%	0%	0%	4%	4%	4%	0%	4%	4%	0%

¹ GSP Beneficiary

Export and import tariffs for GRG

Source: export duties, www.madb.europa.eu; import tariffs, TARIC database

When exporting from the EU to the trading partner country

Code	Products	Argentina	Brazil	Canada	China	Colombia	India	Indonesia	Japan	Korea	Malaysia	Paraguay	Peru	Russia	Singapore	Thailand	Ukraine	Uruguay	USA ¹	Vietnam
4008	Plates, sheets, strips, rods, profile shapes	14%	14%	0,0	8%	0-10%	10%	5%	0%	0-1.3%	5-30%	11-14%	0%	5%	0%	5-30%	0-5%	14%	0-3,3%	3%
4009	Tubes , pipes hoses	14%	14%	0,0	10-10,5%	0-5%	10%	5%	2,3-2,5%	0-1.3%	30%	10%	0%	0-3%	0%	5-10%	0-10%	14%	2,5%	3%
4010	Conveyor and transmission belts	14%	14%	0%	8-10%	0%	10%	5%	1,9%	0-1.3%	30%	10-14%	0%	5%	0%	10%	0-10%	14%	1,9-8%	7.5-22.5%
4015	Gloves	16%	16%	10-15,5% ¹	8-18%	0-14.5%	10%	10%	0%	0%	0-15%	16%	0-6%	10%	0%	10%	5-10%	16%	0-4%	5-20%

¹ Of Free-on-Board (FOB) value

When importing from the trading partner country to the EU

Code	Products	Argentina	Brazil ¹	Canada	China	Colombia	India ¹	Indonesia ¹	Japan	Korea	Malaysia	Paraguay ¹	Peru	Russia	Singapore	Thailand	Ukraine ¹	Uruguay	USA	Vietnam ¹
4008	Plates, sheets, strips, rods, profile shapes	2,9-3%	0%	2,9-3%	2,9-3%	0%	0%	0%	2,9-3%	0%	2,9-3%	0%	0%	2,9-3%	2,9-3%	2,9-3%	0%	2,9-3%	2,9-3%	0%
4009	Tubes , pipes hoses	3%	0%	3%	3%	0%	0%	0%	3%	0%	3%	0%	0%	3%	3%	3%	0%	3%	3%	0%
4010	Conveyor and transmission belts	6,5%	0%	6,5%	6,5%	0%	0%	0%	6,5%	0%	6,5%	0%	0%	6,5%	6,5%	6,5%	0%	6,5%	6,5%	0%
4015	Gloves	2,0-5%	0%	2,0-5%	2-5%	0%	0%	0%	2,0-5%	0%	2,0-5%	0%	0%	2,0-5%	2,0-5%	2,0-5%	0%	2,0-5%	2,0-5%	0%

¹ GSP Beneficiary



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