European Tyre & Rubber Industry

Statistics

EDITION 2019






N. 10

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 will 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:
Each section of is colour-marked. 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, OICA & the IRSG

FOREWORD

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 towards 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 with emerging countries 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.

N.B.: data originating from industry sources is regularly updated. Therefore, there may be discrepancies with historic data shown in this booklet.

The European Tyre and Rubber Industry

ETRMA

2017/2018 Key Figures

VEHICLE INDUSTRY DATA

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 Members

Tyre Corporate*

www.apollovredestein.com

www.bridgestone.eu

www.conti-online.com

www.coopertire.co.uk

www.goodyear.eu

www.hankooktire.com

www.michelin.com

www.nokiantyres.com

www.pirelli.com

www.srigroup.co.jp

www.trelleborg.com

National Associations

Belgium
www.essenscia.be

France
www.lecaoutchouc.com

Germany
www.wdk.de

The Netherlands
www.vereniging-nvr.nl

Finland
www.kumiteollisuus.fi

Italy
www.federazionegommaplastica.it

Spain
www.consorciocaucho.es

Affiliated members

www.brisa.com.tr

www.marangoni.com

www.prometeon.com

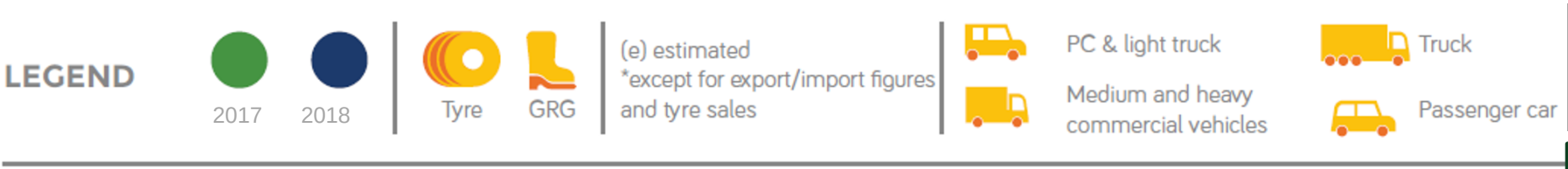
www.btmauk.com

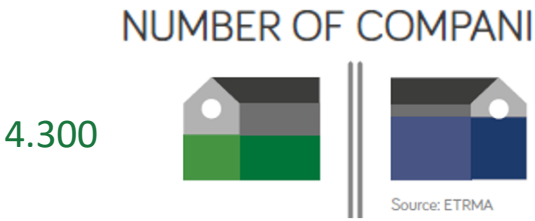
www.hta.org.hu

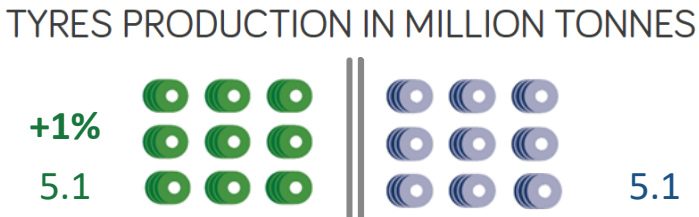
www.pzpo.org.pl

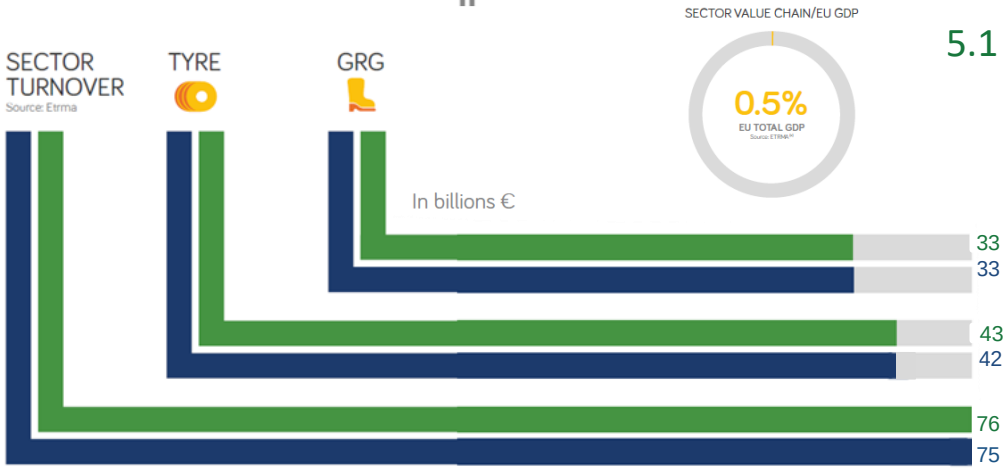
2017/2018 Key Figures

2017/2018 Key Figures



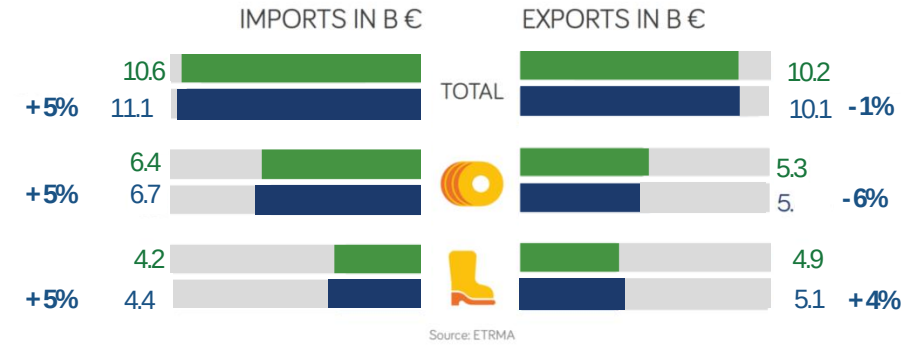


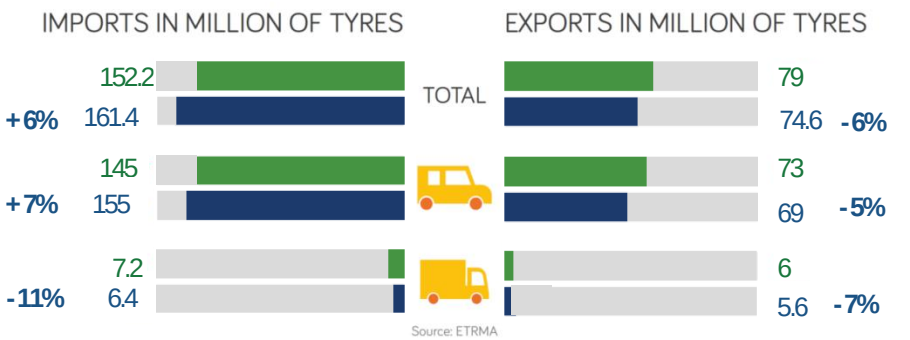


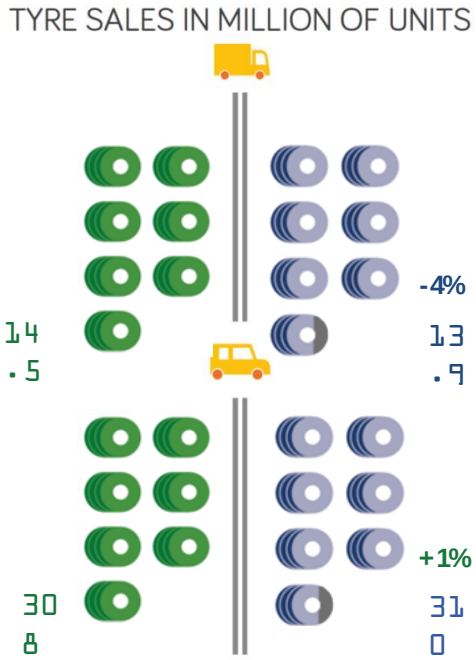


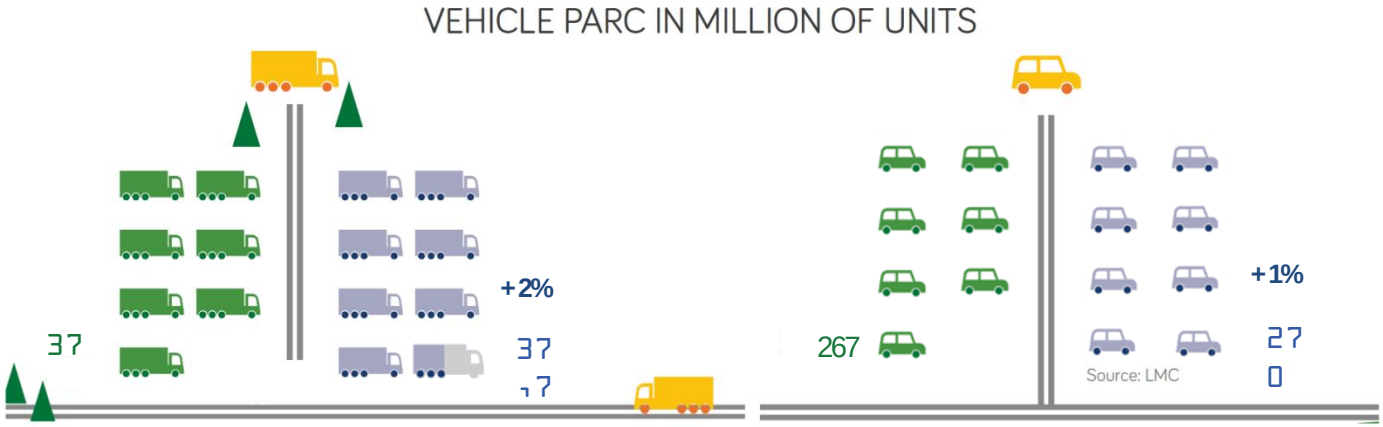
COMPRISING 70% OF THE WORLD TYRE INDUSTRY TURNOVER

2017/2018 Key Figures





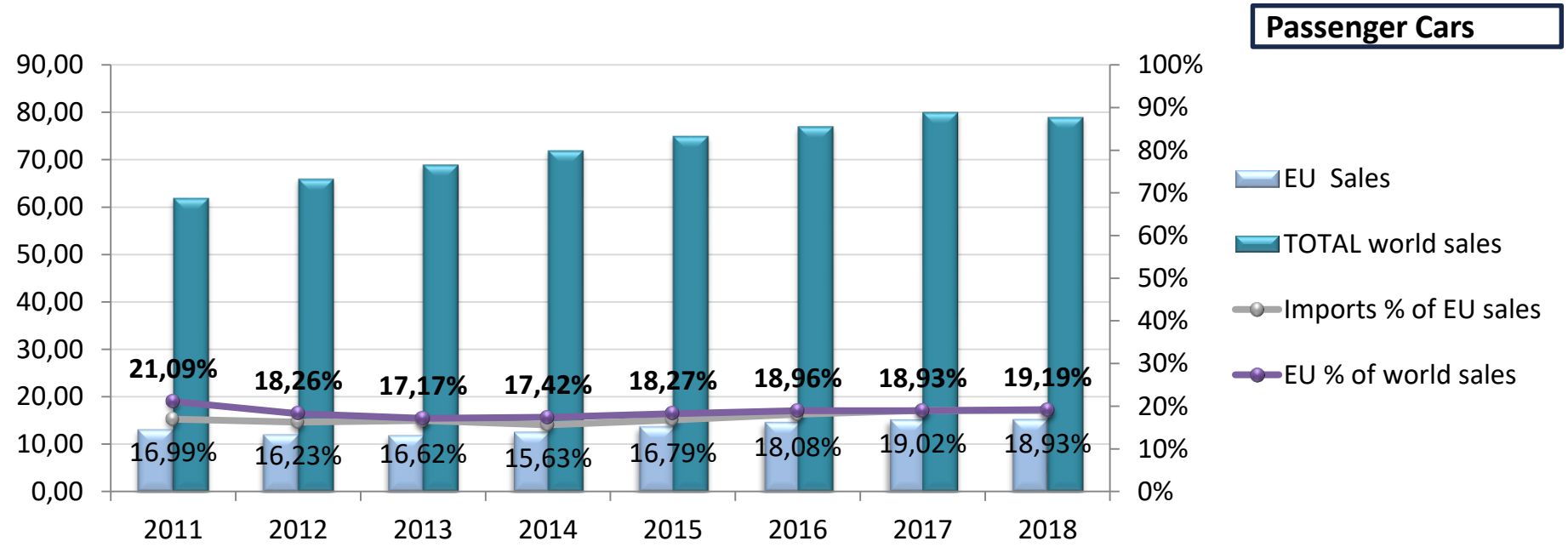


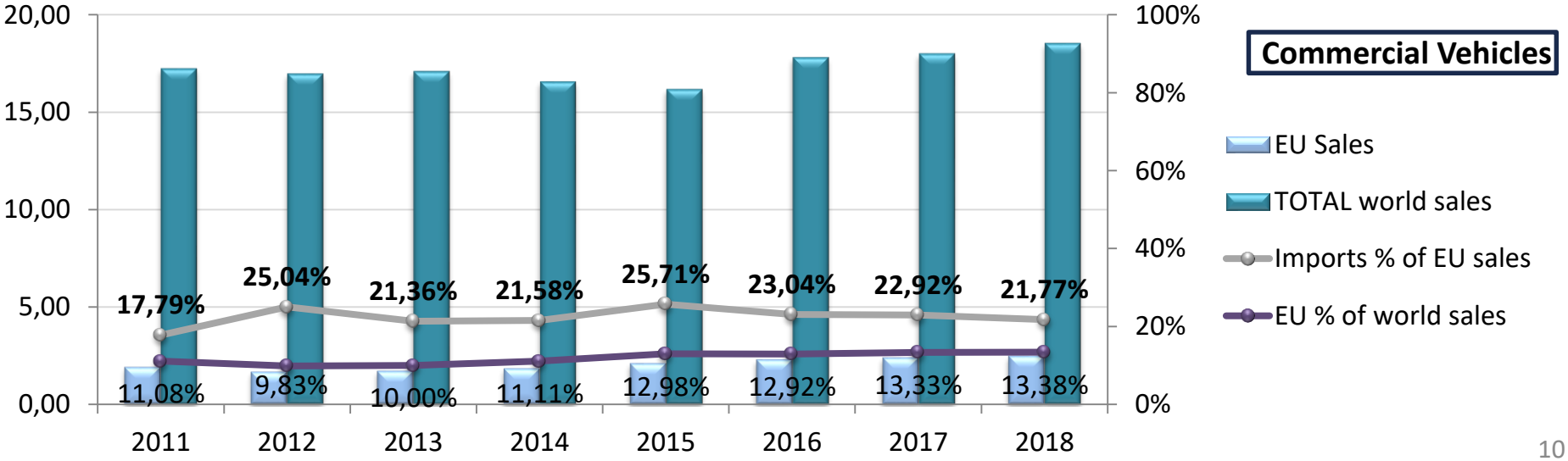


Vehicle Data

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

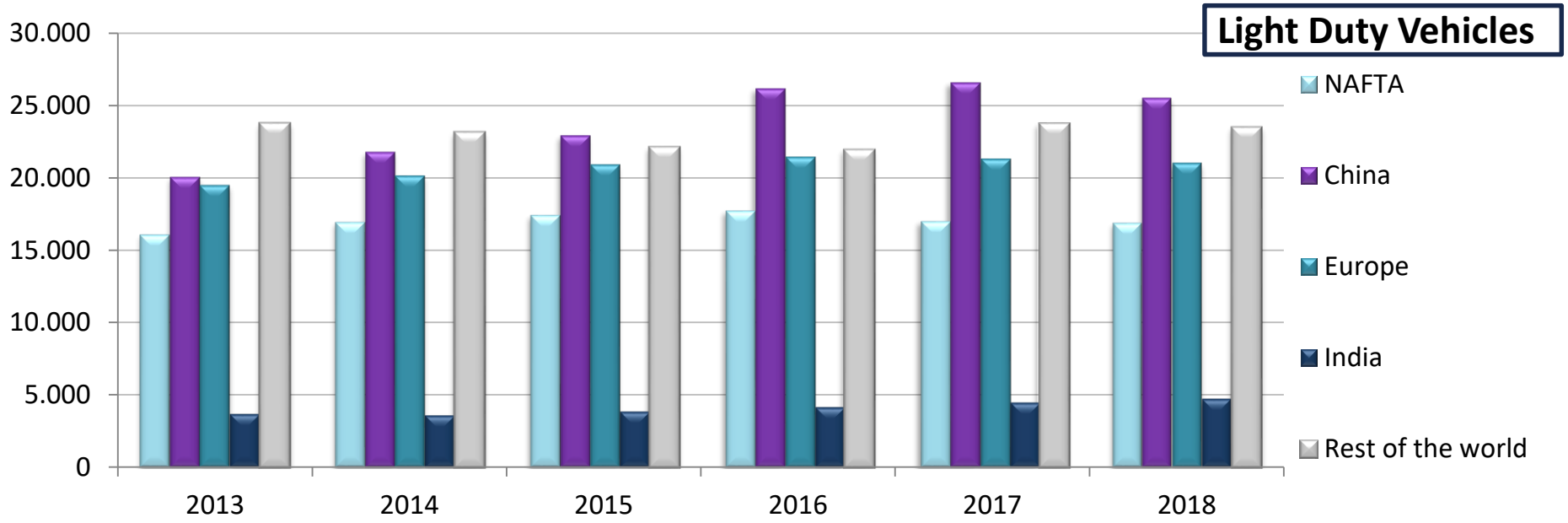
Source: ACEA and Eurostat/in '000.000 units

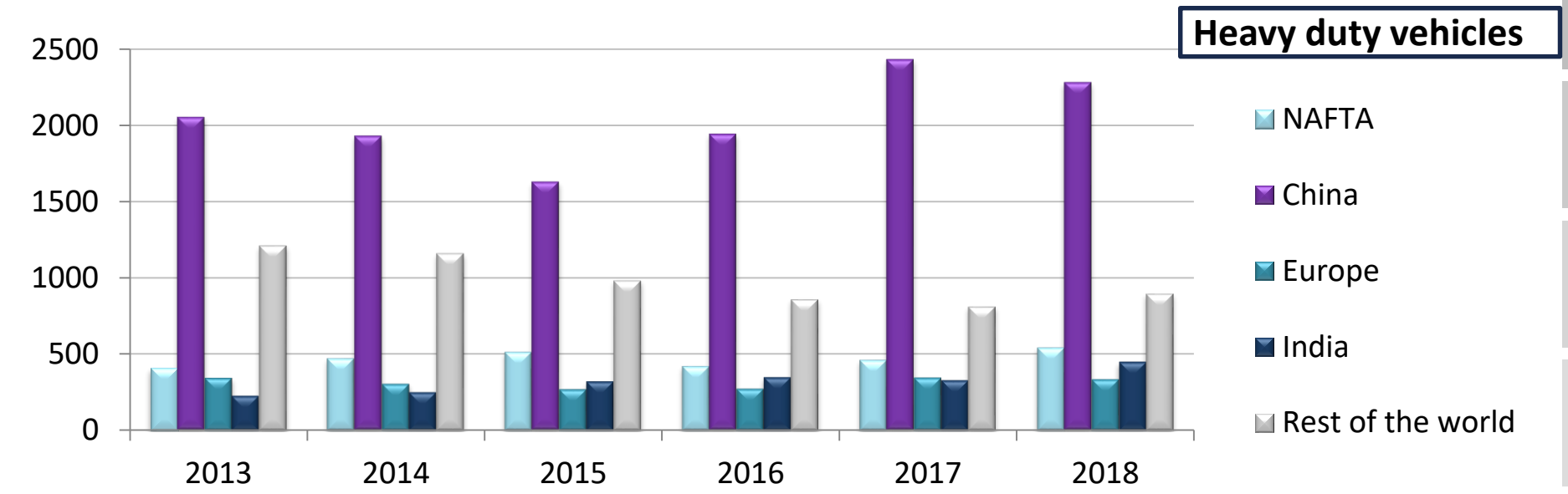




Production of passenger cars, LCV and MHCV - major markets

Source: OICA/ in '000 units





GENERAL RUBBER GOODS

General Rubber Goods (GRGs) in Europe are a high technology enabler for other industries from the automotive industry to pharmaceutical one.

In 2018, the production of GRGs remained mostly stable.

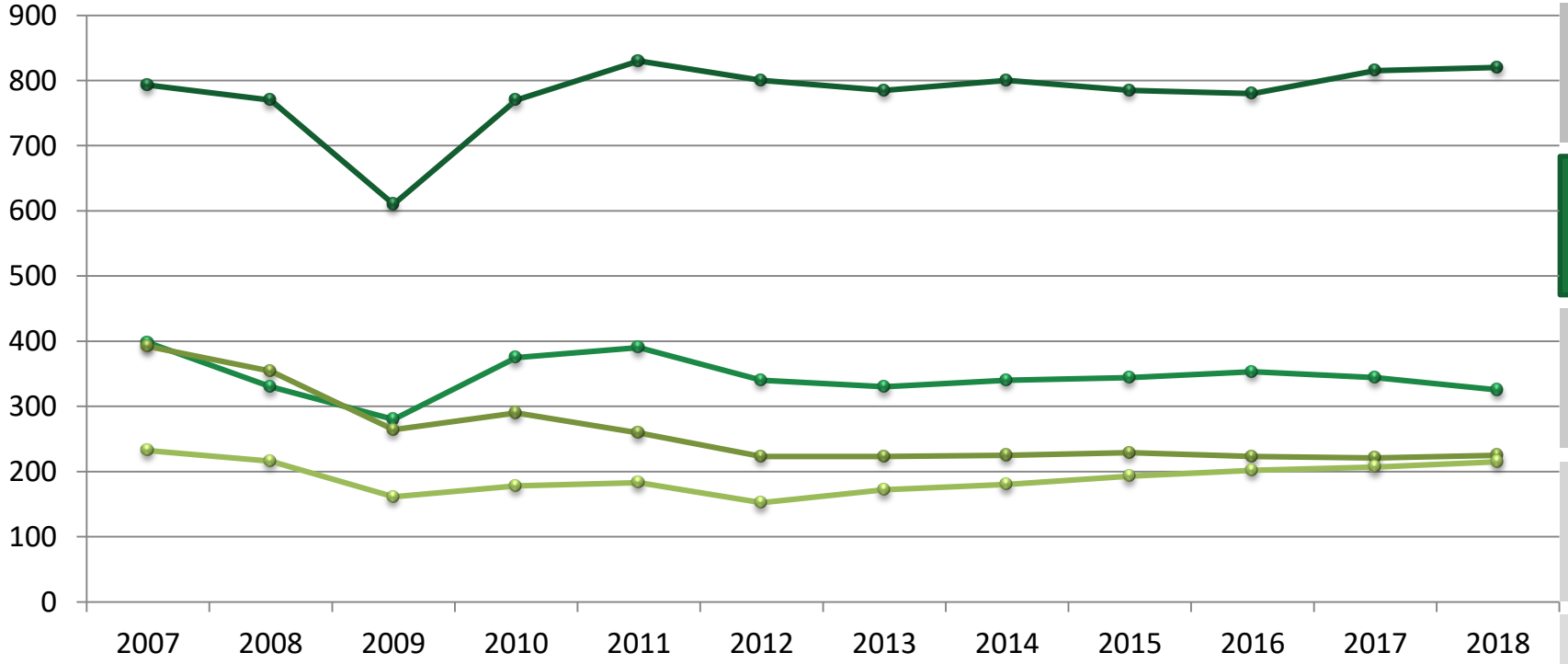
Export and imports of General Rubber Goods grew in 2017 and 2018 in parallel, after a couple of years of receding data.

The distribution of imports and exports amongst the world's markets remain mostly unchanged.

Evolution of GRG production*

Source: ETRMA/in '000 tonnes

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
France	398	330	280	375	390	340	330	340	344	353	344	325
Germany	793	770	610	770	830	800	785	800	785	780	815	820
Italy	392	354	264	290	259	223	223	225	229	223	221	225
Spain	232	216	161	178	183	168	172	180	193	202	207	215



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

Top 10 global GRG companies

Source: ERJ

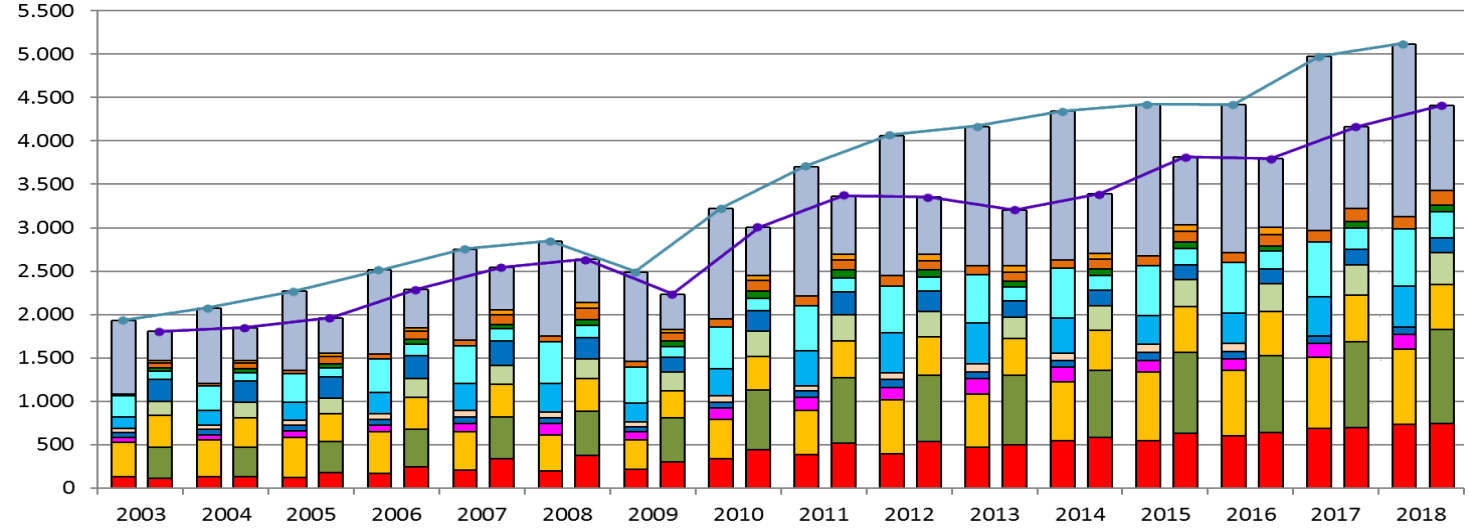
Rank 2017	Rank 2018	Company	Headquarter	2017 Non tyre rubber sales in $M	2018 Non tyre rubber sales in $M	Variation
1	1	Continental Ag(e)	Germany	6,45	6,80	↑ 5%
2	2	Freudenberg Group(e)	Germany	6,32	6,68	↑ 6%
3	3	Hutchinson SA	France	4,63	5,78	↑ 25%
4	4	Sumitomo Riko (e)	Japan	3,92	4,04	↑ 3%
5	5	CooperStandardAuto(e)	USA	3,44	3,45	0%
8	6	Gates Corp (e)	USA	3,04	3,35	↑ 10%
6	7	Bridgestone Corp. (e)	Japan	3,09	3,31	↑ 7%
7	8	NOK Inc. (e)	Japan	3,06	3,26	↑ 7%
11	9	Parker Hannigin Corp.	US	2,40	2,86	↑ 19%
10	10	Trelleborg AB(e)	Sweden	2,64	2,81	↑ 6%

(e)= estimate

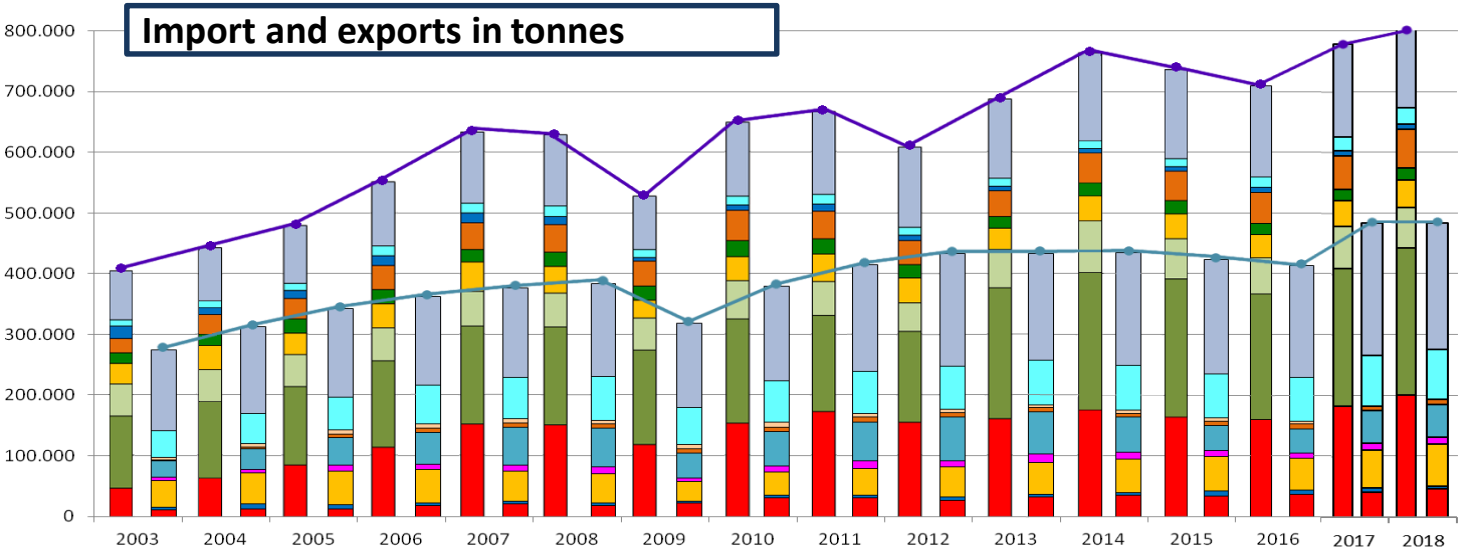
GRG°Import/Export

Source: Eurostat

Import and exports in M€



Import and exports in tonnes



EU imports

EU exports

- Other
- Non EU Europe
- South Korea
- Japan
- India
- RussiaUkraine
- Indonesia
- United States
- BRAZIL
- Thailand
- Malaysia
- China

°HS Codes: 4007, 4008, 4009, 4010, 4014, 4015, 4016.9100, 4016.9200, 4016.9300

TYRES

The tyre industry has a strong and stable presence in the EU, with new investments being made, especially in Central and Eastern Europe.

Tyre production in Europe remains stable and some new players are entering the top ten of world manufacturers for turnover. 7 of these are ETRMA members and all ETRMA Members pulled together, count for 73% of the industry's global turnover.

ETRMA's members sales remained stable in 2018, but the market shrank for truck and bus tyres and for agricultural tyres. The retreading market slightly increased in 2018, for the first time since 2011.

When looking at imports and exports, imports generally kept increasing, whilst exports decreased for all segments. Exports remains strongly reliant on NAFTA, non-EU European countries, Russia, Ukraine and Turkey.

With regard to imports of PC Tyres, China alone makes up for 48% of all EU imports and in 2018, Chinese exports to the EU went up by almost 10%. Chinese exports to the EU are now more than the total of EU exports to the rest of the world.

As for TB Tyres, imports from China decreased by 52% – as a result of anti-dumping duties. Imports from ASEAN (especially Thailand), South Korea and Turkey partially filled in the gap in the market.

For Moto tyres, ASEAN countries remain the most important importers.

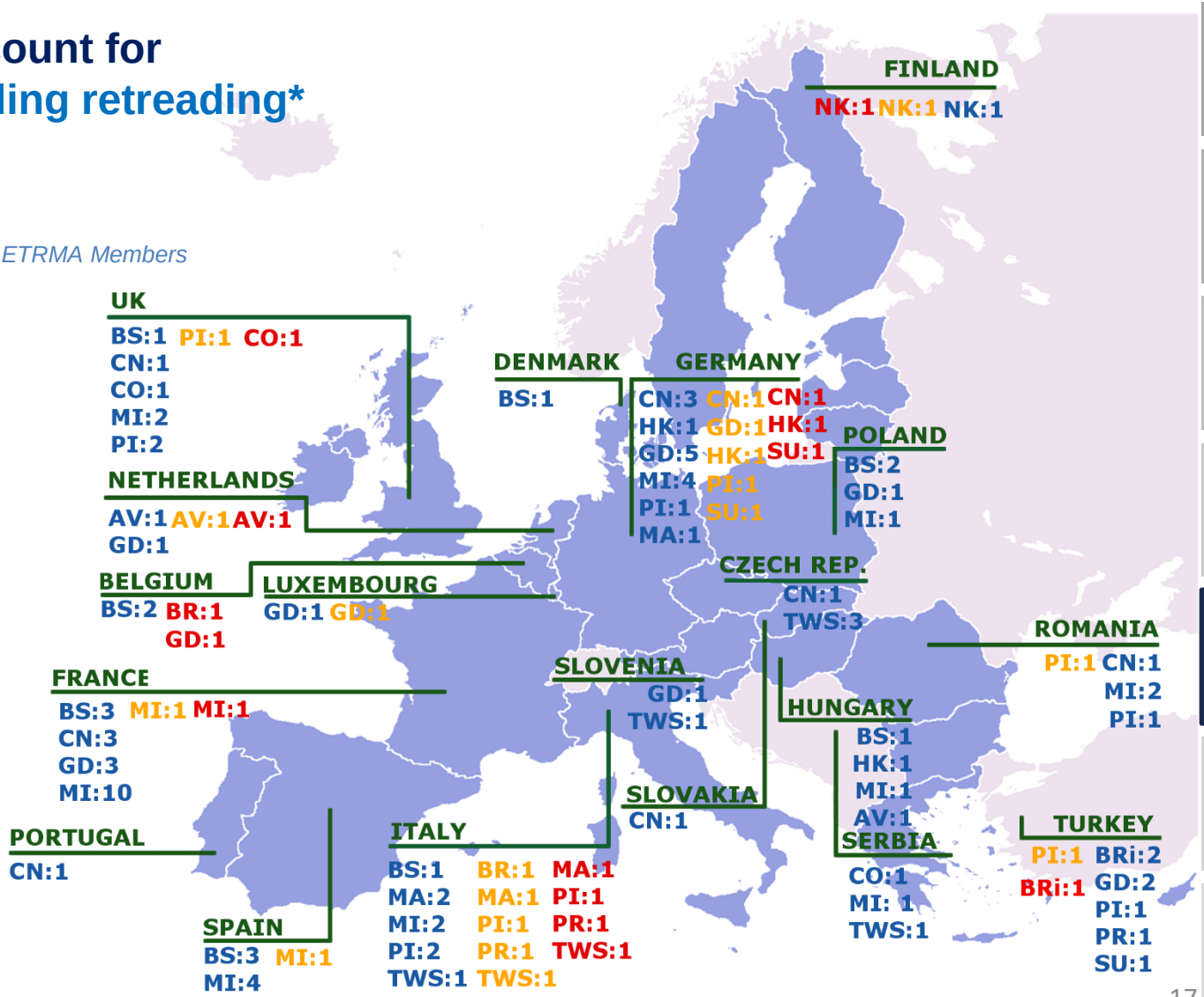
ETRMA's tyre companies plants

Situation at June 2019

ETRMA members account for

- **92 tyre plants, including retreading***
- **18 R&D centres**
- **14 HQs**

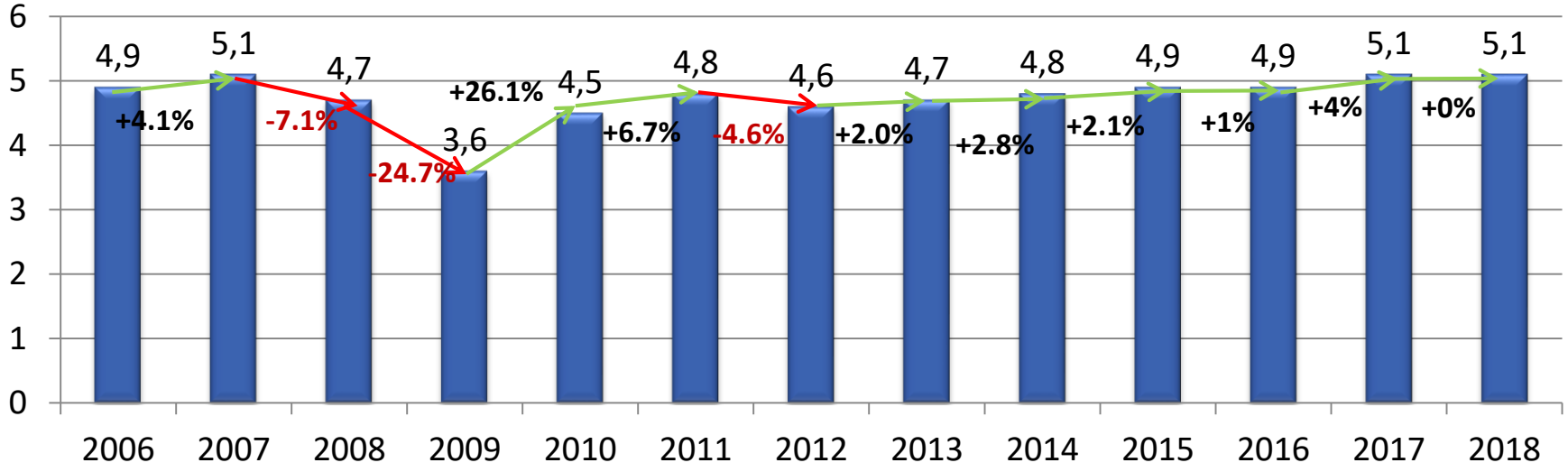
** Only retreading operations belonging to ETRMA Members*



AV=Apollo Vredestein
BS=Bridgestone
BRi=Brisa
CN=Continental
CO=Cooper
GD=Goodyear Dunlop
HK=Hankook
MA=Marangoni
MI=Michelin
NK=Nokian
PI=Pirelli
PR=Prometeon
SU=Sumitomo
TWS= Trelleborg Wheel Systems

EU tyre production and ranking of world tyre companies' sales

Source: ETRMA/'000.000 tonnes and Tyre and Accessories

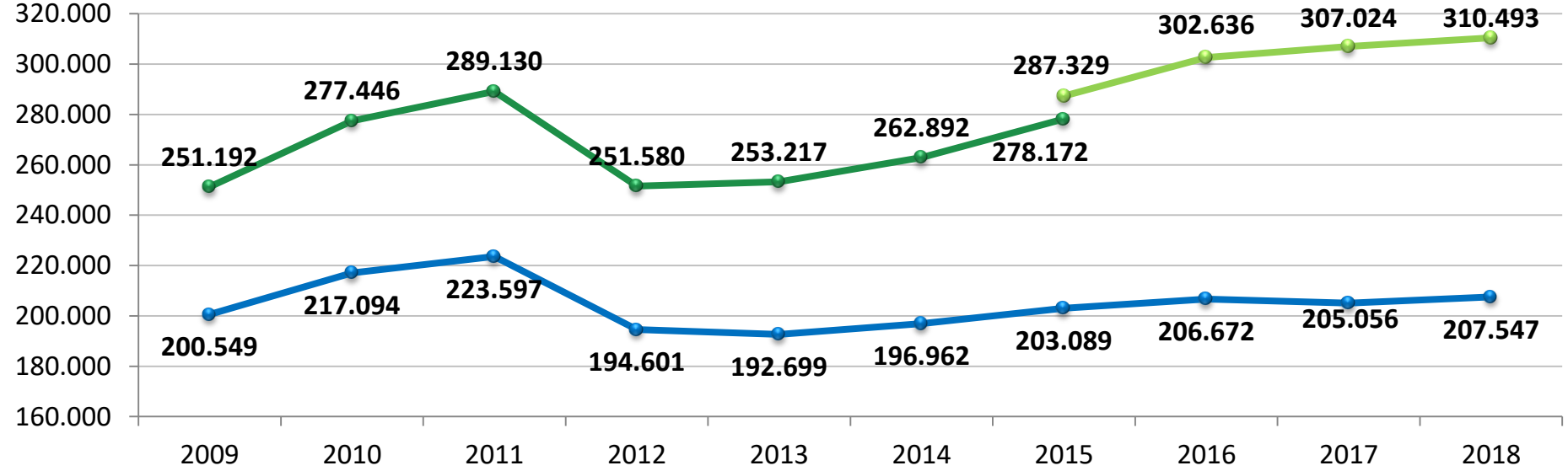


2017	2018	Company	Headquarter	2017 sales in €M	2018 sales in €M	Variation
1	1	Bridgestone	Japan	22.560	24.247	↑ 7%
2	2	Michelin	France	21.521	21.587	0%
3	3	Goodyear	USA	12.822	13.515	↑ 5%
4	4	Continental	Germany	11.326	11.352	0%
7	5	Sumitomo	Japan	5.605	6.104	↑ 9%
6	6	Hankook	South Korea	5.325	5.317	0%
5	7	Pirelli	Italy	5.352	5.194	↓ -3%
8	8	Yokohama	Japan	3.567	3.612	↑ 1%
10	9	ZC Rubber	China	3.063	3.413	↑ 11%
9	10	Maxxis	Taiwan	3.156	3.120	↓ -1%

Annual sales trends on the European tyre replacement market

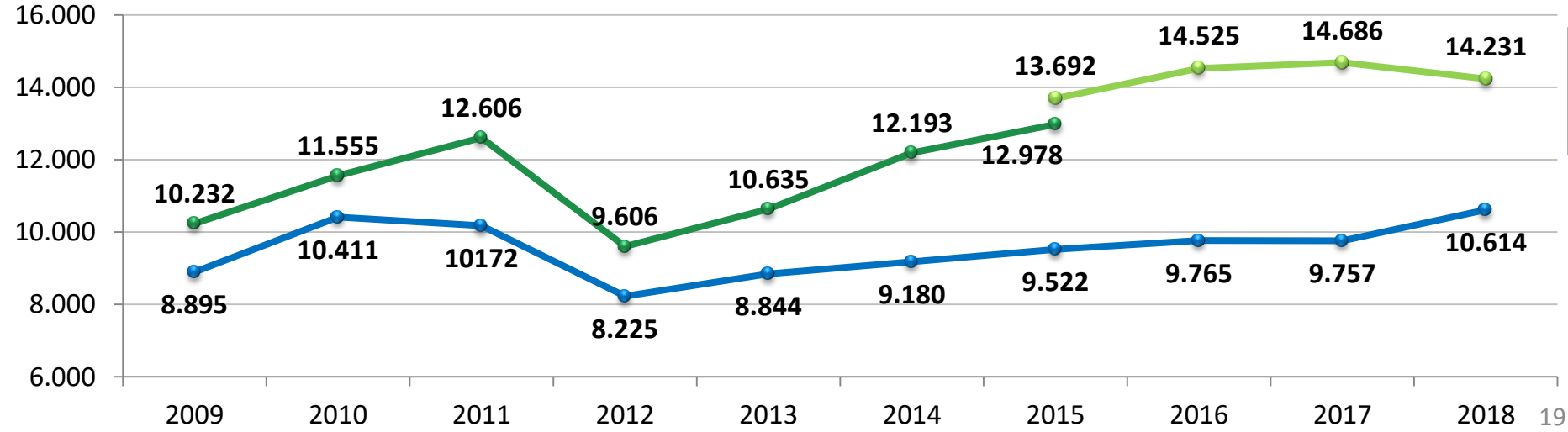
Source: Europool and Eurostat/in '000 units / replacement market

Cars and light truck tyres HS Code: 40111000; 40112010



Truck and bus tyres HS Code: 4011.2090

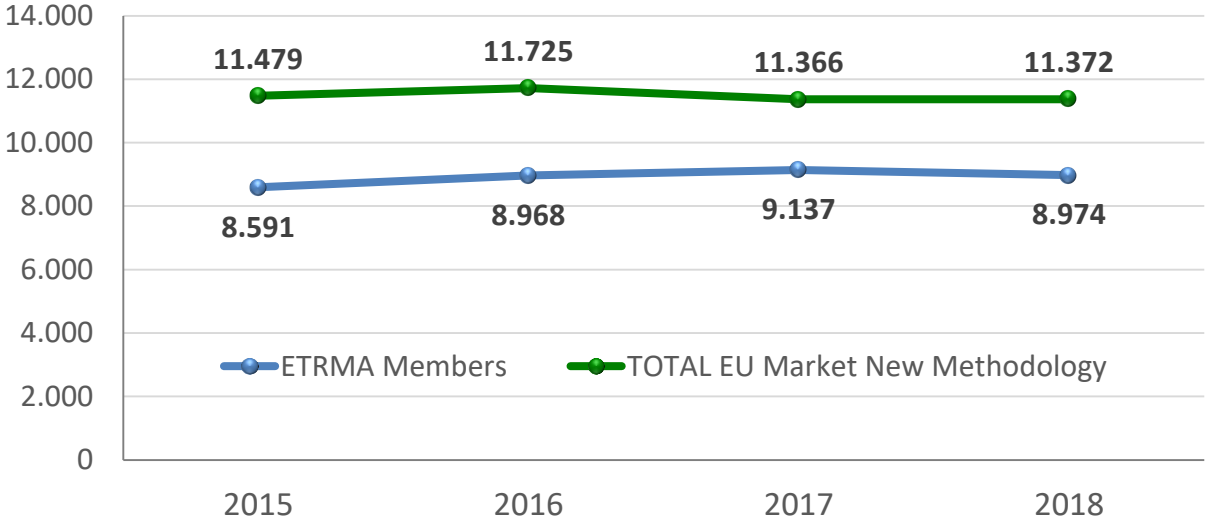
Tot. Market | ETRMA Members | TOTAL MARKET NEW METHODOLOGY



Annual sales trends on the European tyre replacement market

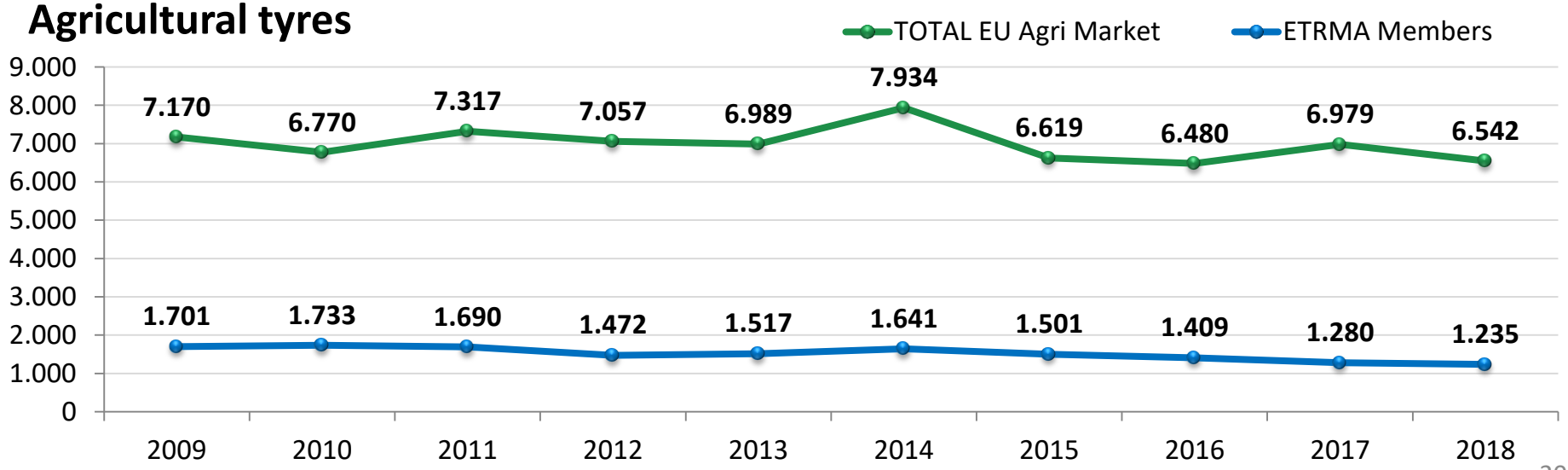
Source: Europool and Eurostat/in '000 units / replacement market

Motorcycle and scooter tyres



Data calculated with the new methodology is not comparable with data previously provided for this tyre segment. A new data series is therefore provided starting from 2015.

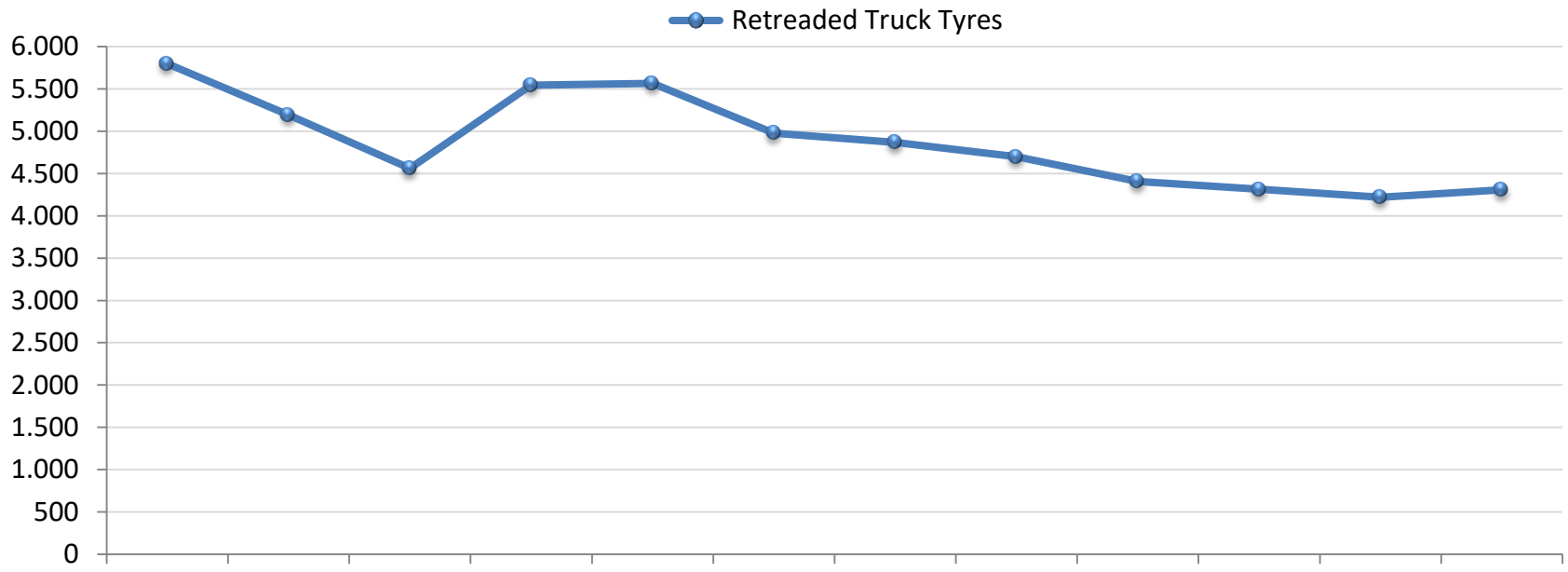
Agricultural tyres



Truck tyre Retreading market in Europe

Source: Europool / '000 units – perimeter includes Turkey

Retreaded truck tyres 2007 - 2018

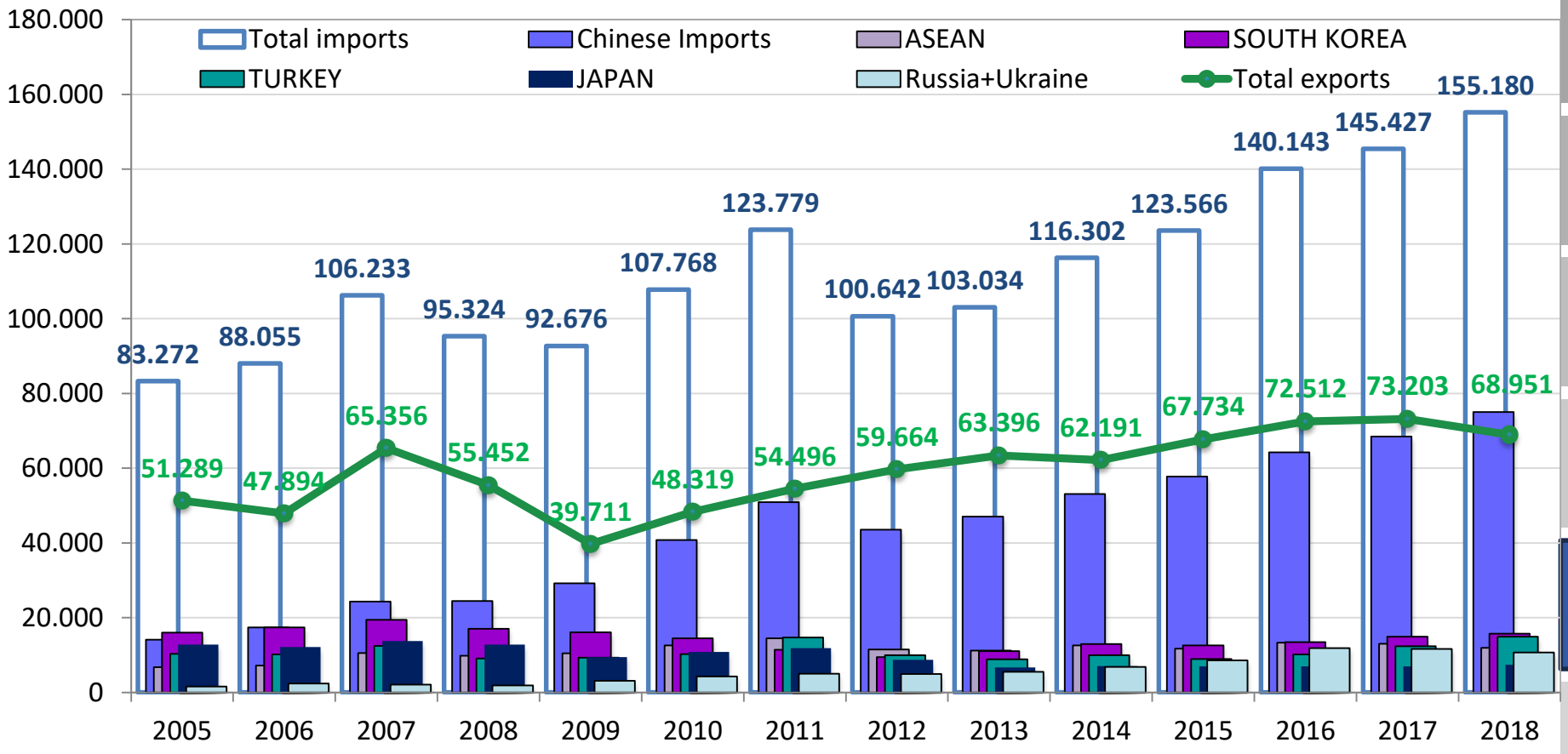


	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Retreaded Truck Tyres	5.800	5.193	4.561	5.546	5.567	4.978	4.867	4.699	4.406	4.316	4.218	4.307

EU Imports of passenger and light commercial vehicle tyres

Source: Eurostat/ Trade in '000 units

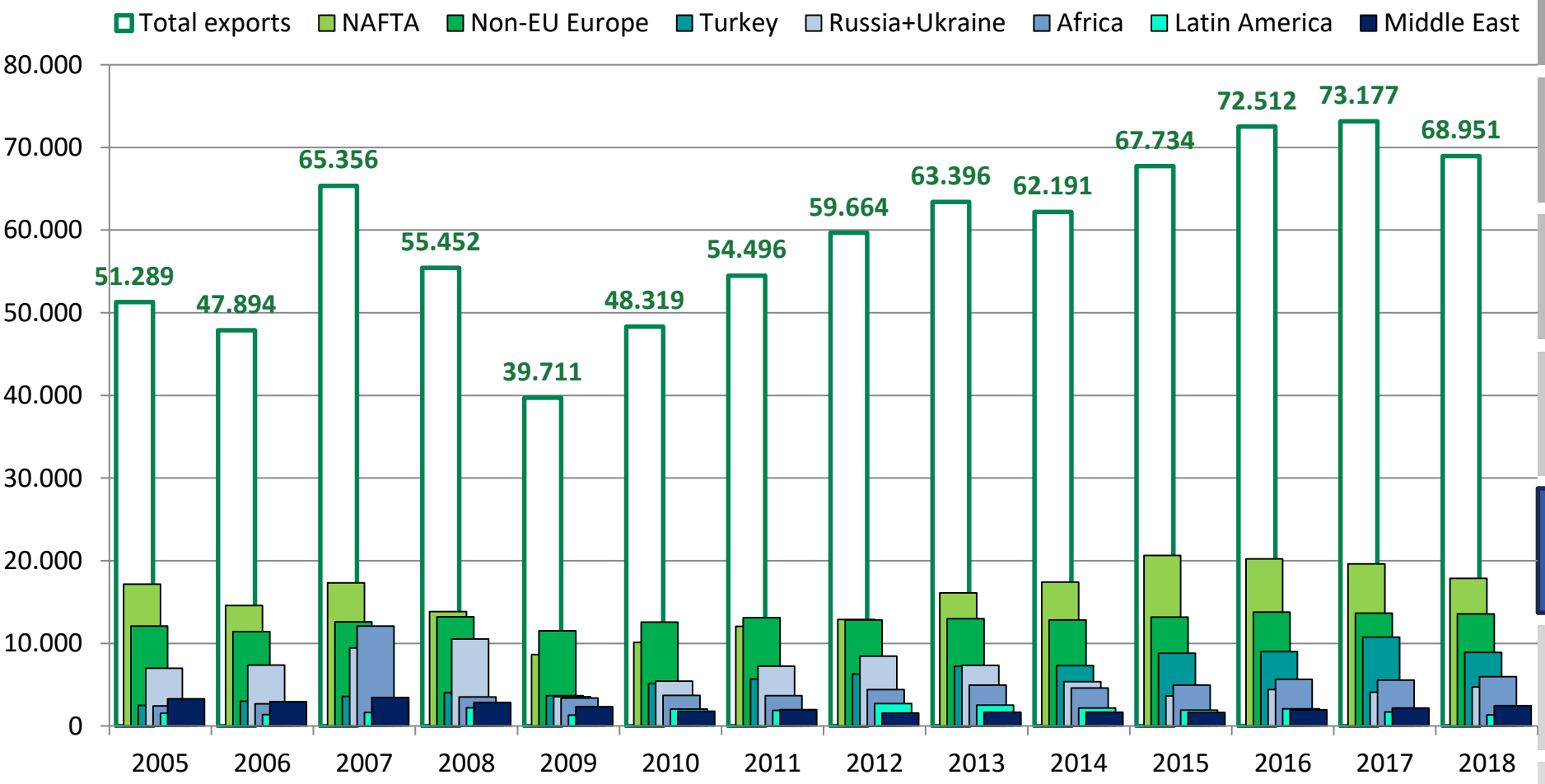
Total EU Imports and main import origins



EU Exports of passenger and light commercial vehicle tyres

Source: Eurostat/ Trade in '000 units

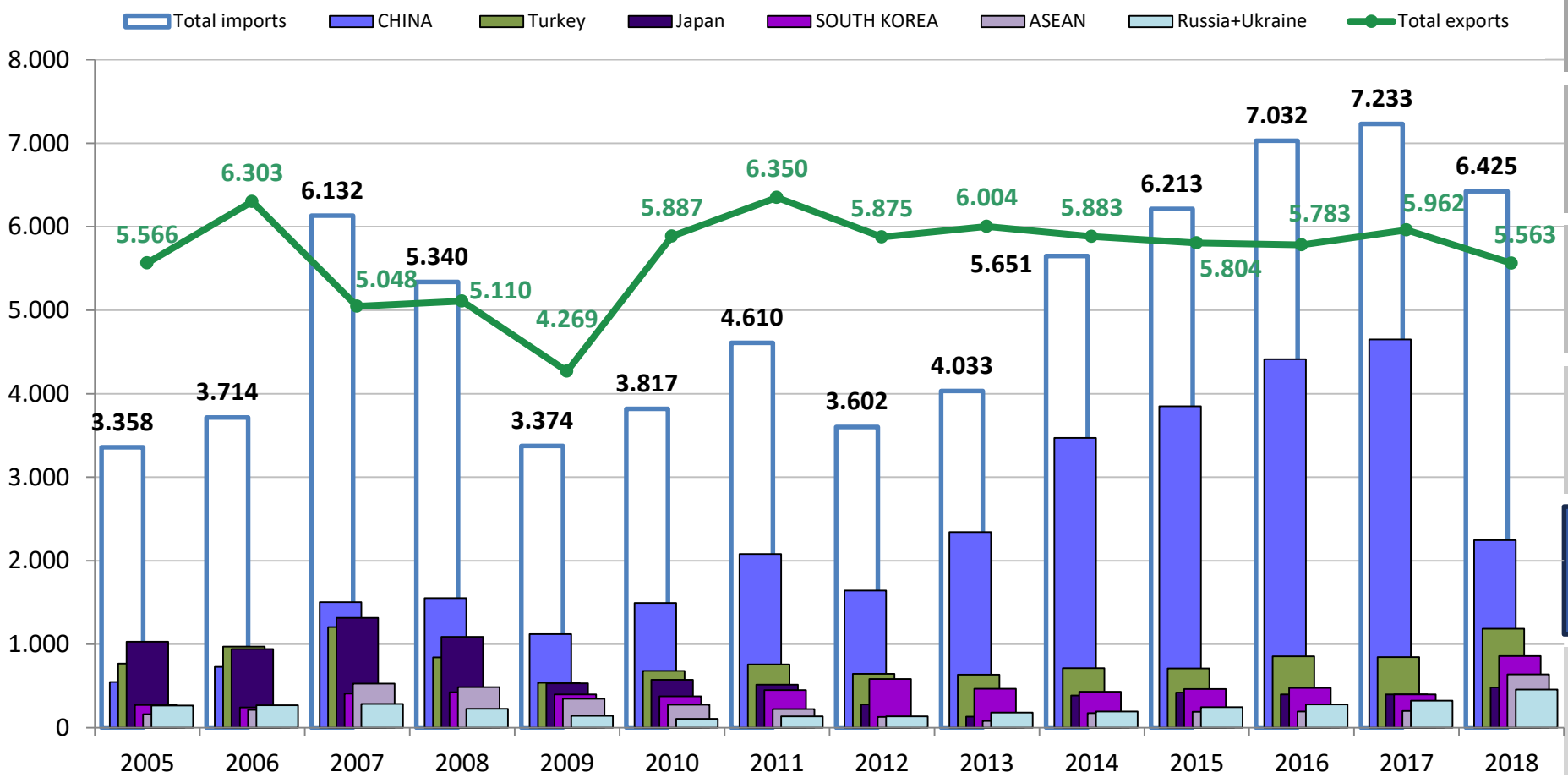
Total Exports and main export destinations



EU Imports of truck and bus tyres

Source: Eurostat/ Trade in '000 units

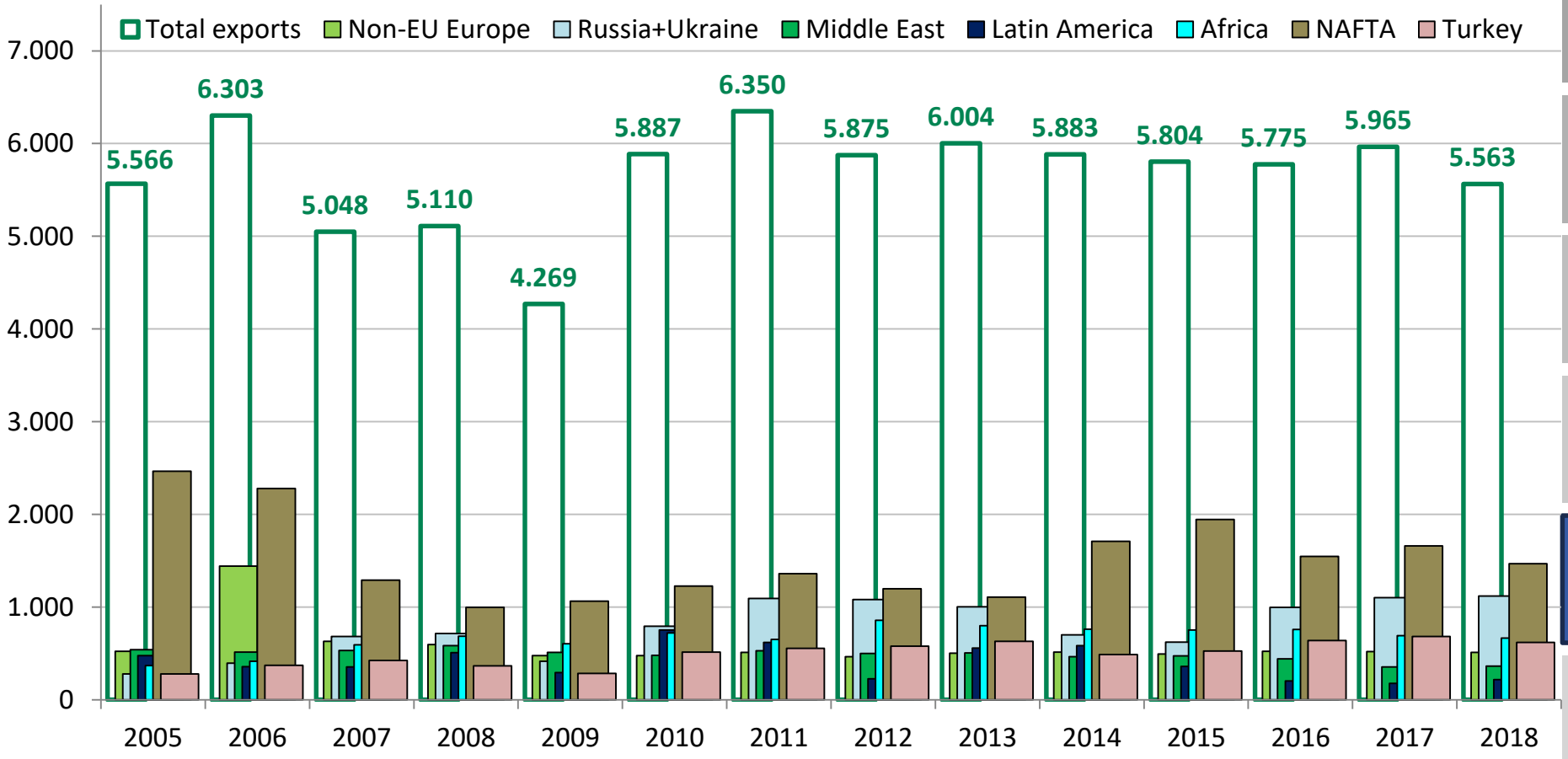
Total EU Imports and main import origin 2005 - 2018



EU Exports of truck and bus tyres

Source: Eurostat/ Trade in '000 units

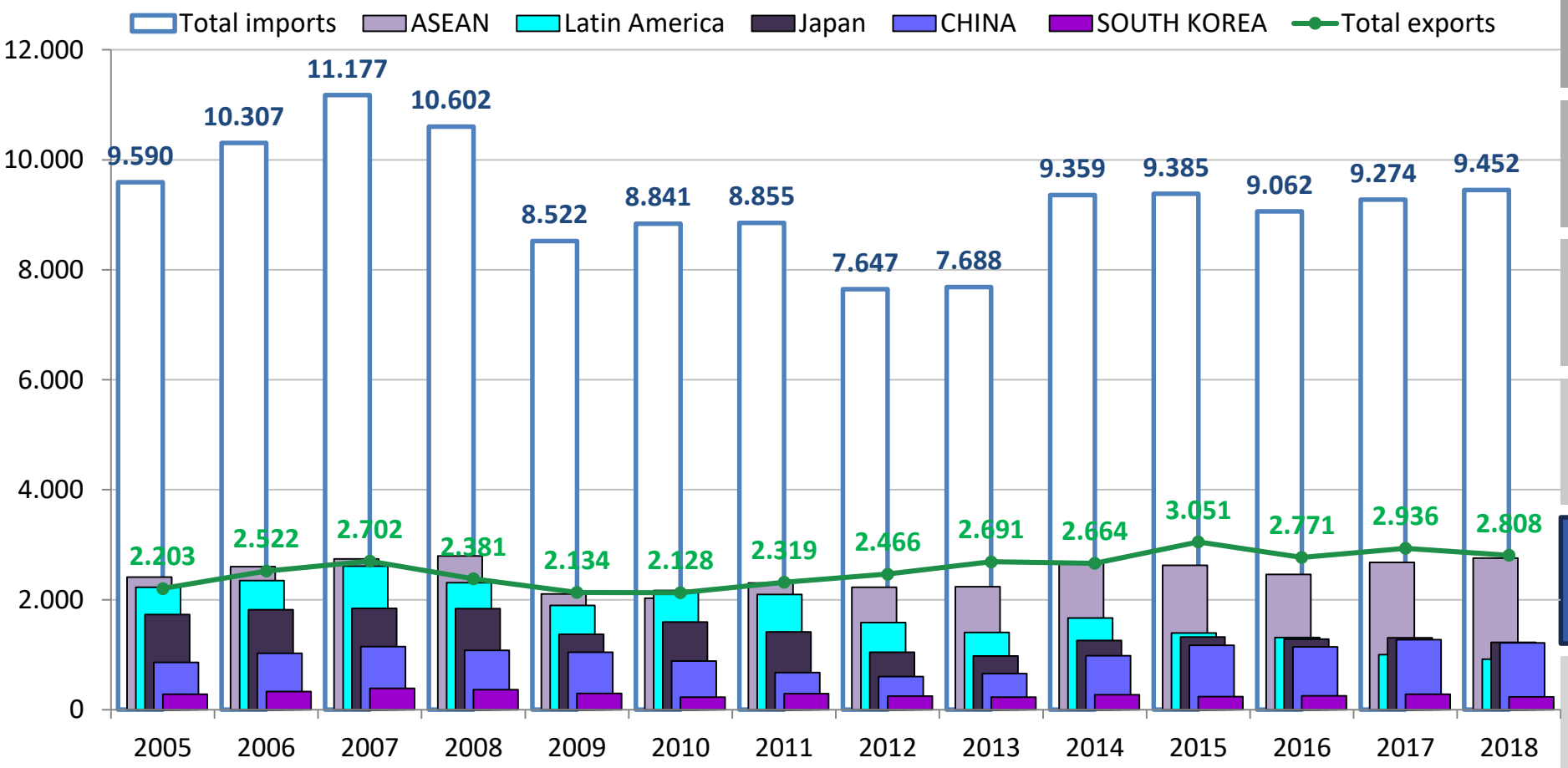
Total Exports and main export destinations 2005 - 2018



EU Imports of moto/scootertyres*

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

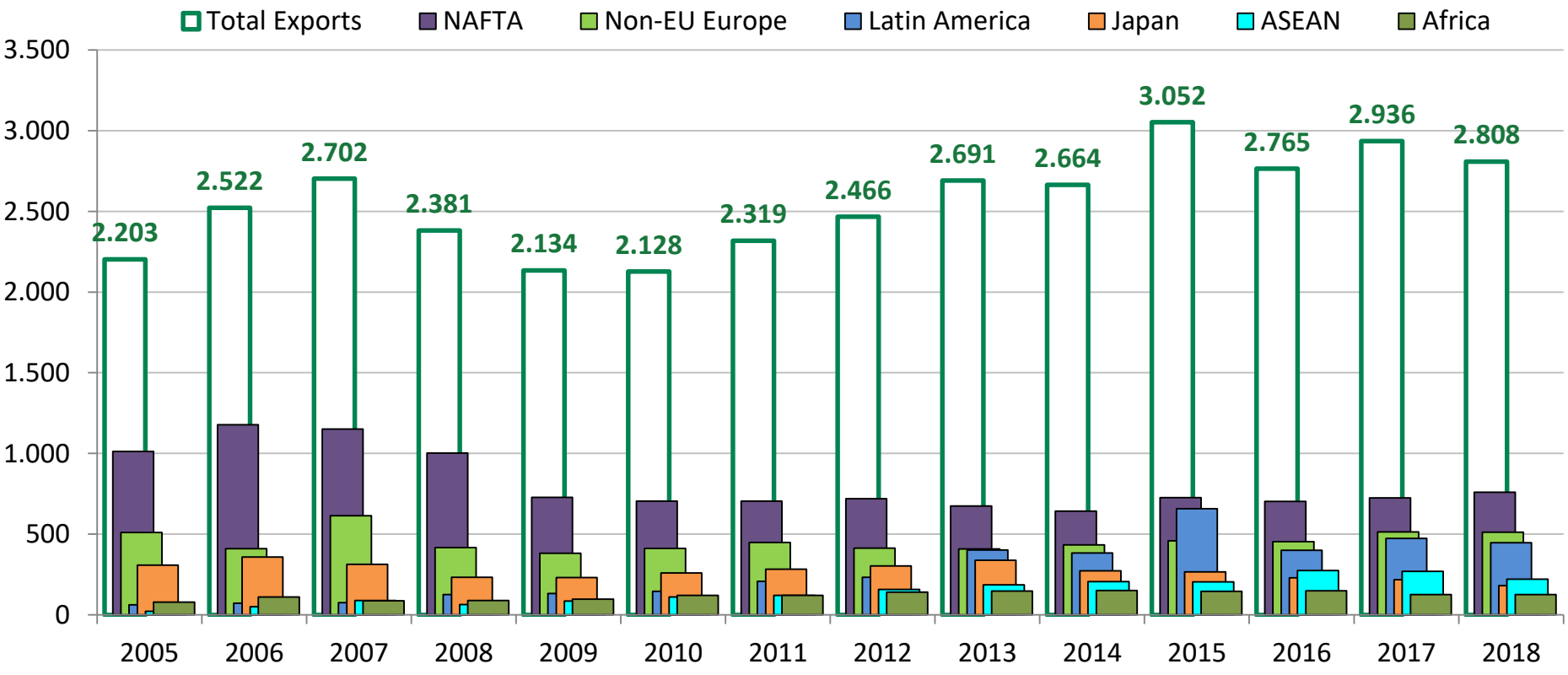
Total Imports and main import origin 2005 - 2018



EU Exports of moto/scootertyres*

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

Total Exports and main export destination 2005 - 2018

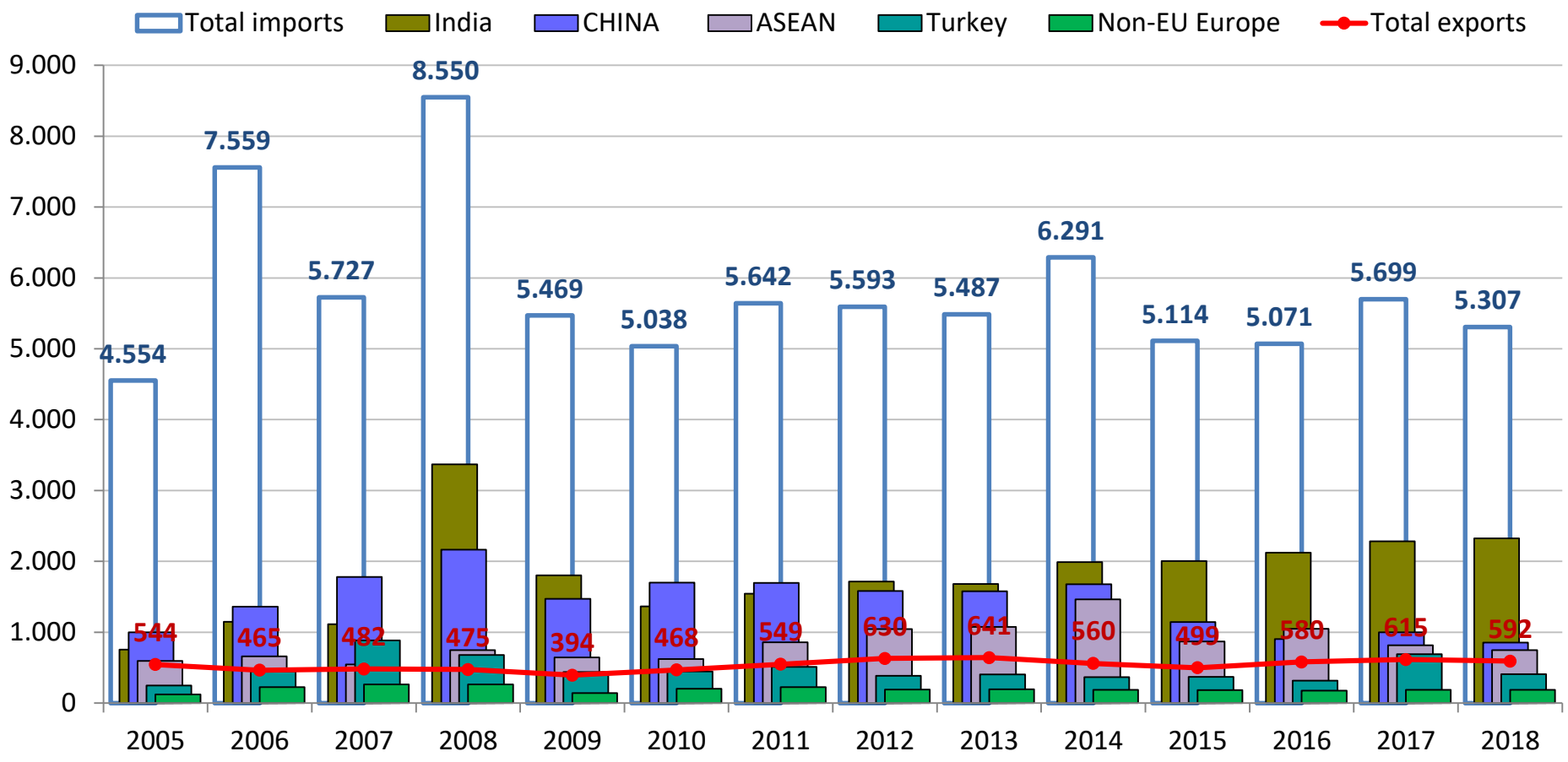


EU Imports of agricultural tyres*

Source: Eurostat/ import and exports in '000 units

*HS Code: 4011.6100 and 4011.9200

Total Imports and main import origins 2005 - 2018

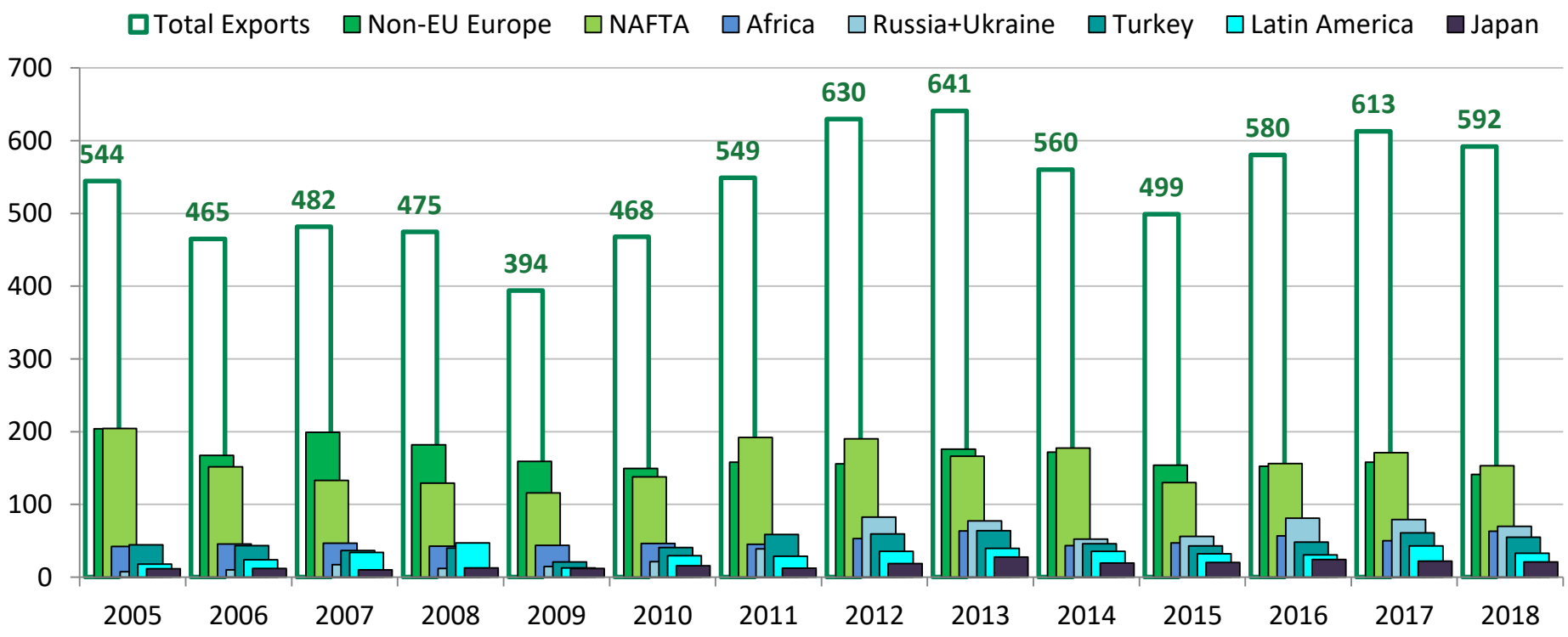


Exports of agricultural tyres*

Source: Eurostat/ import and exports in '000 units

*HS Code: 4011.6100 and 4011.9200

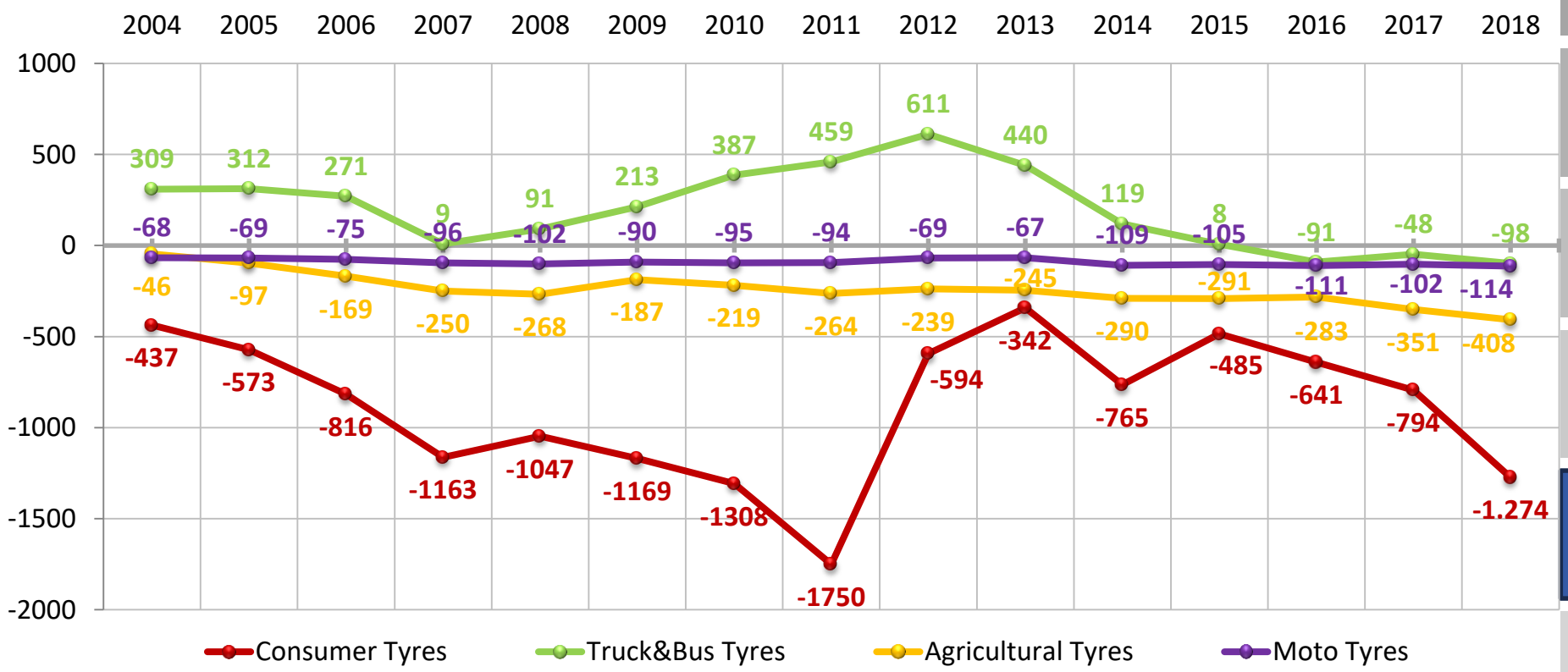
Total Exports and main export destinations



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

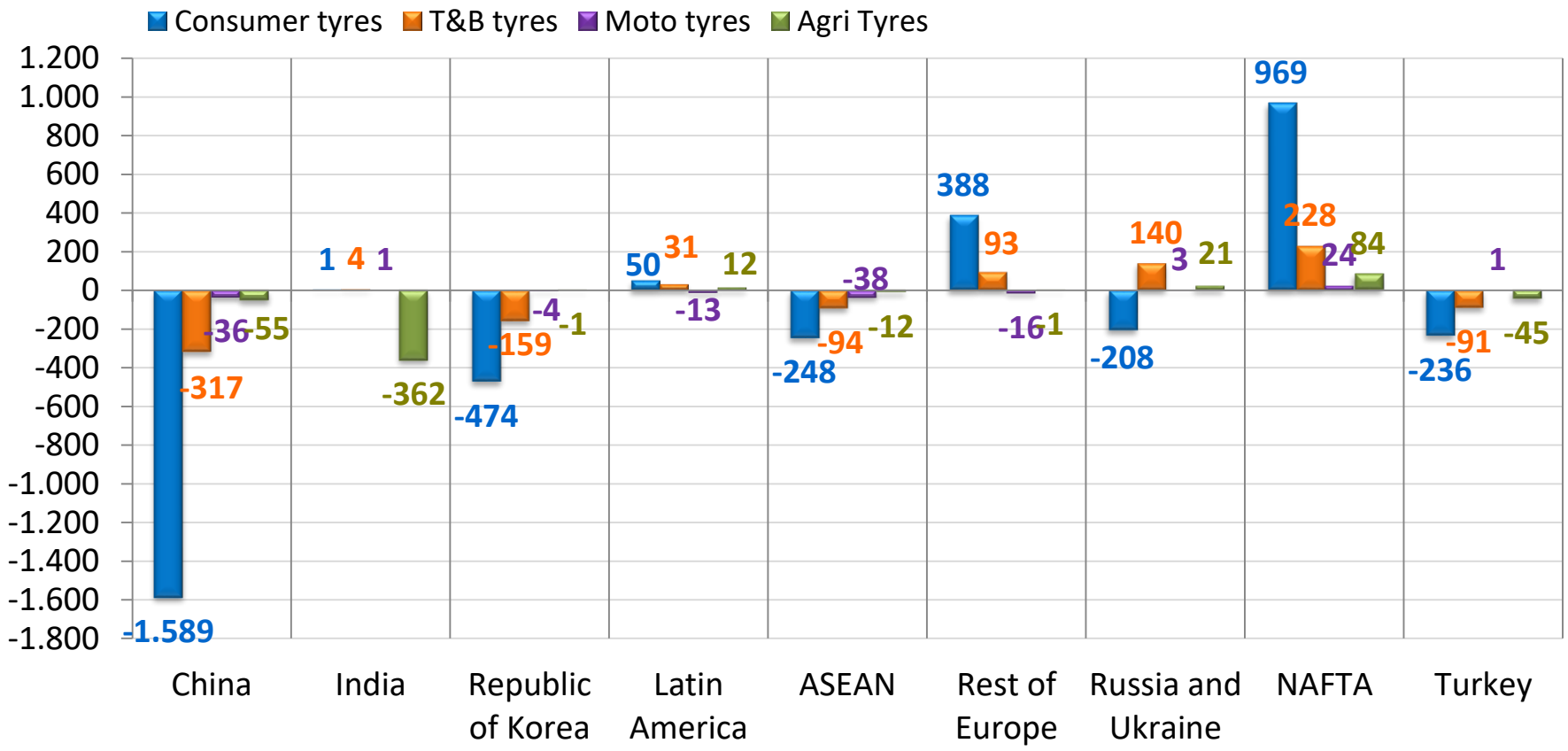
Evolution Trade Balance /tyre type



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

Trade Balance 2016/tyre type and commercial partner

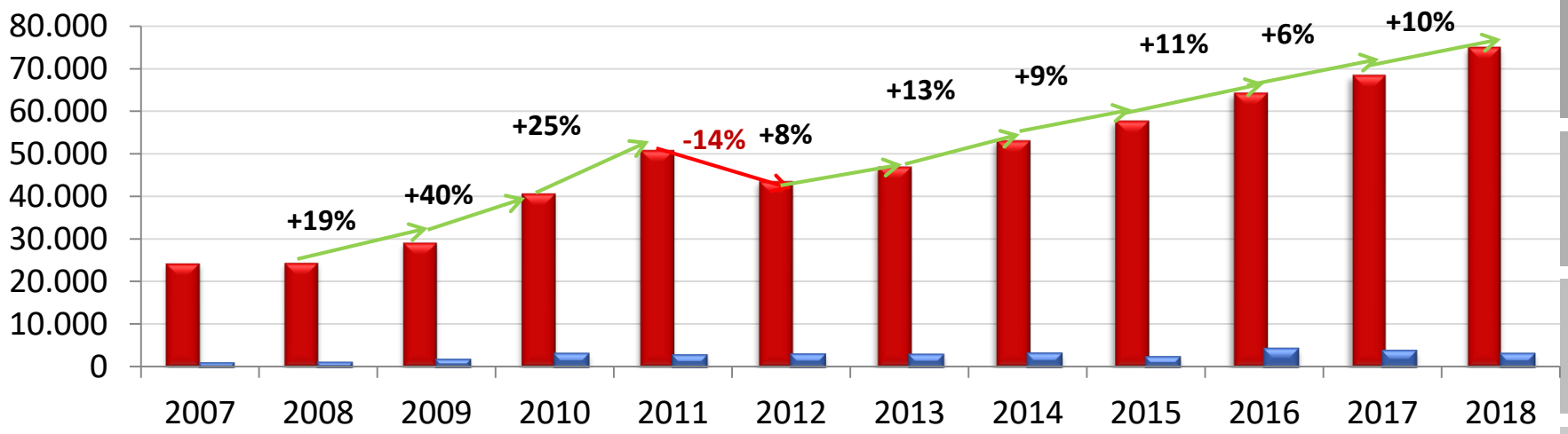


"Rest of Europe" includes the following countries: Albania, Bosnia, Switzerland, Croatia, Iceland, Moldova, Montenegro, Norway, Kosovo, Serbia, Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Liechtenstein.

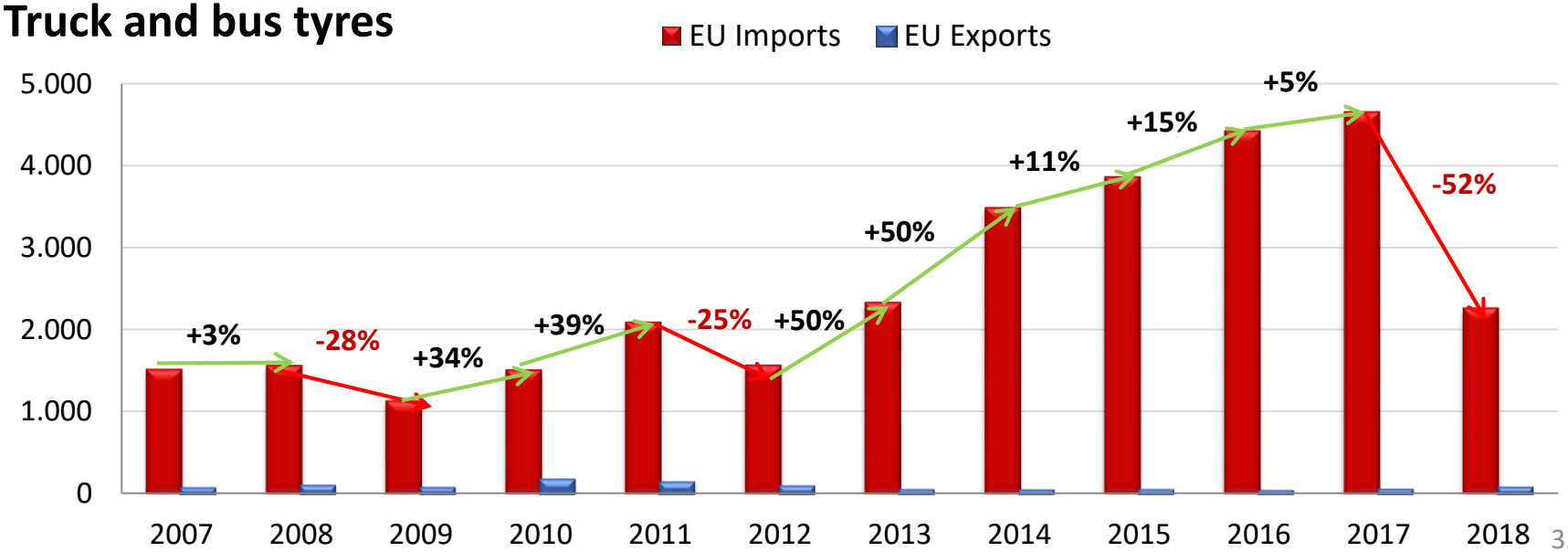
Tyre Import / export with China

Source: Eurostat/'000 units

Cars and light truck tyres



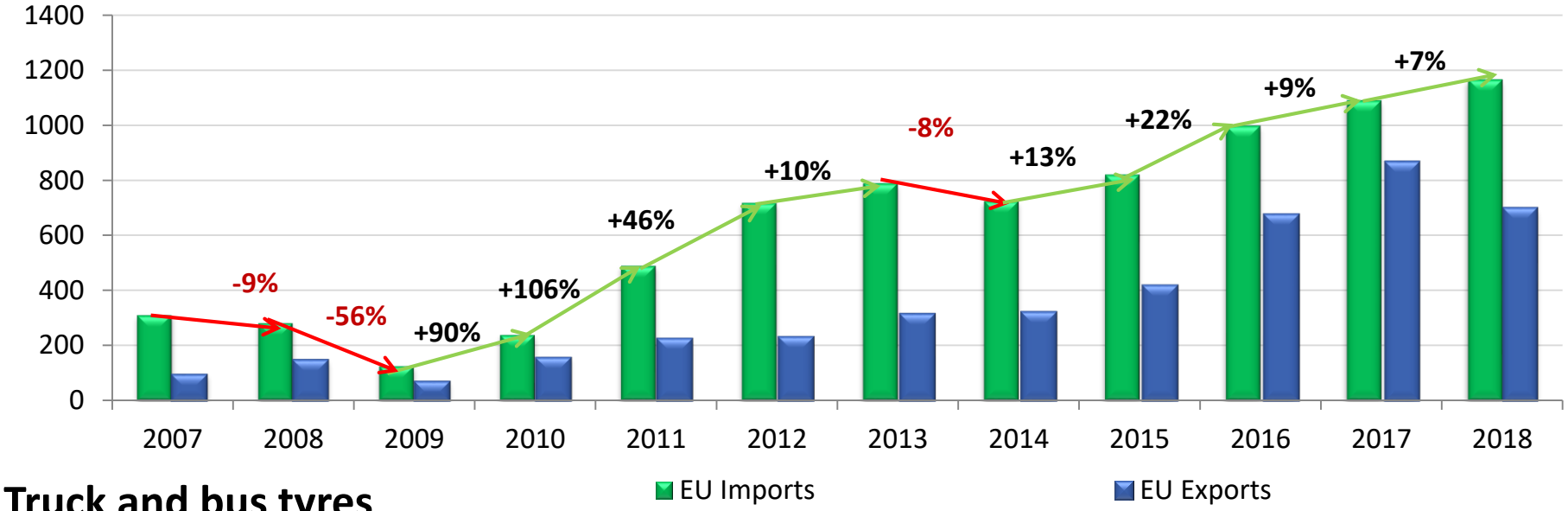
Truck and bus tyres



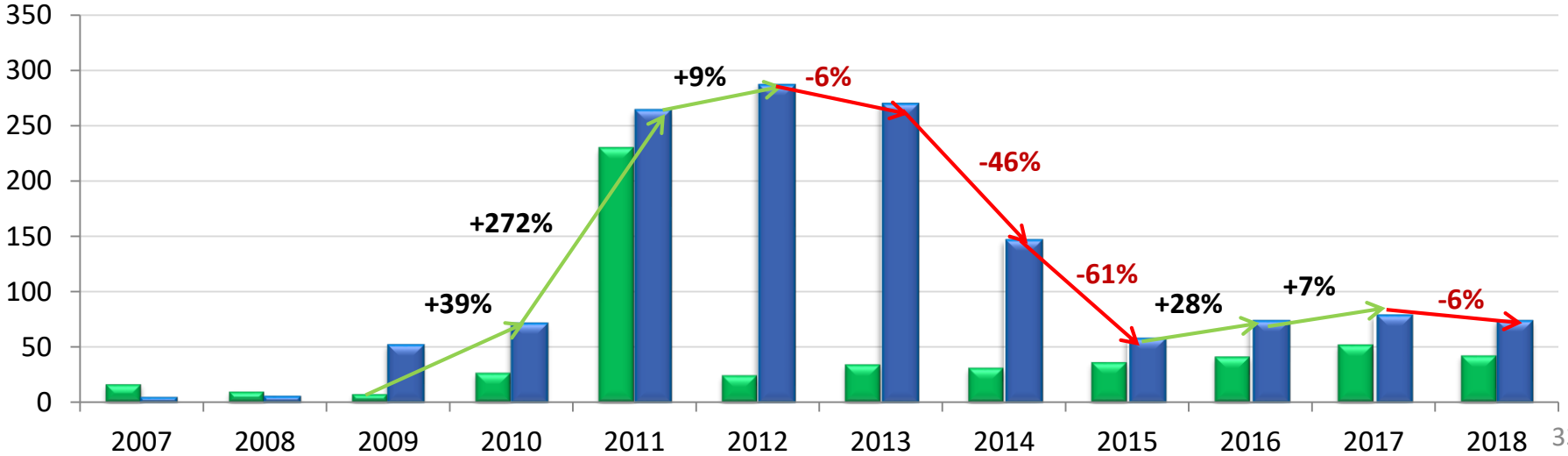
Tyre Import / export with India

Source: Eurostat/'000 units

Cars and light truck tyres



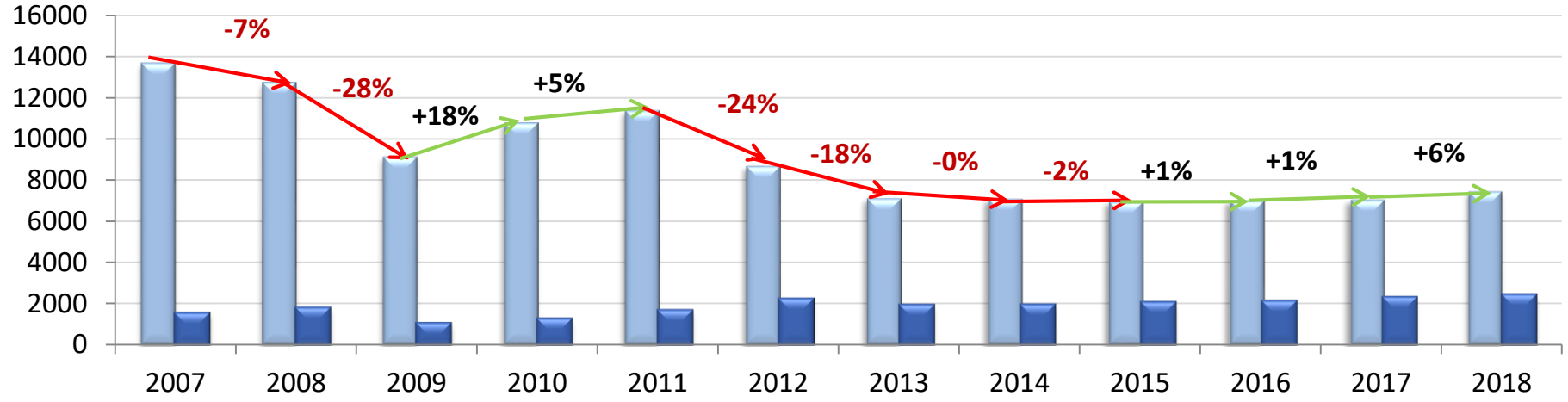
Truck and bus tyres



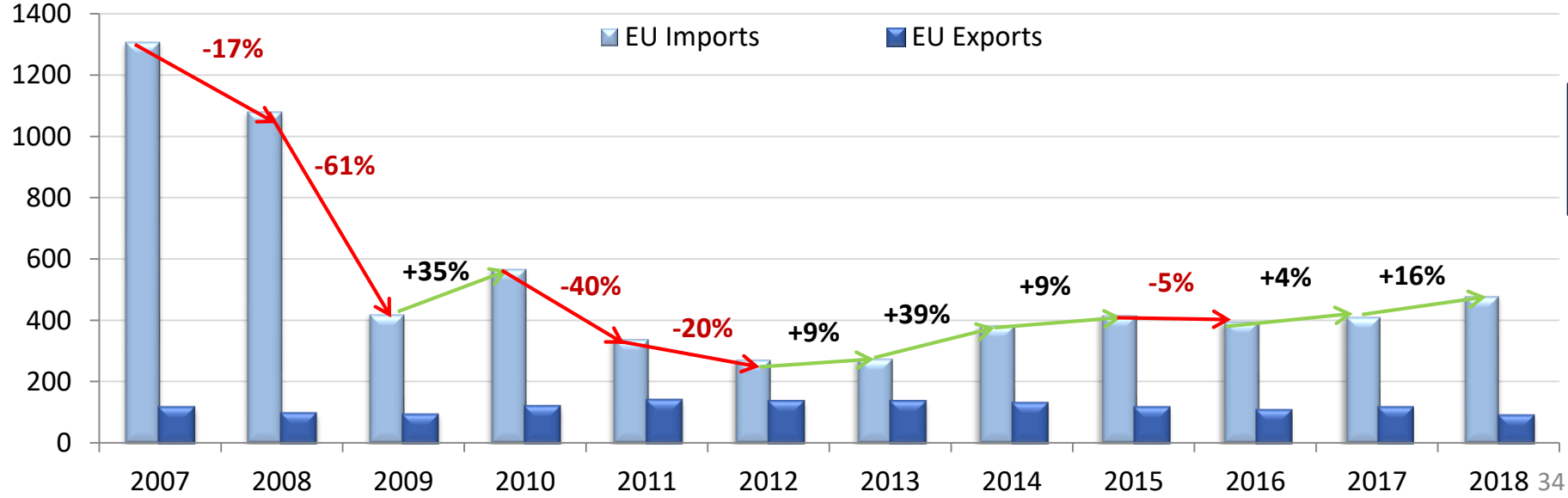
Tyre Import / export with Japan

Source: Eurostat/'000 units

Cars and light truck tyres



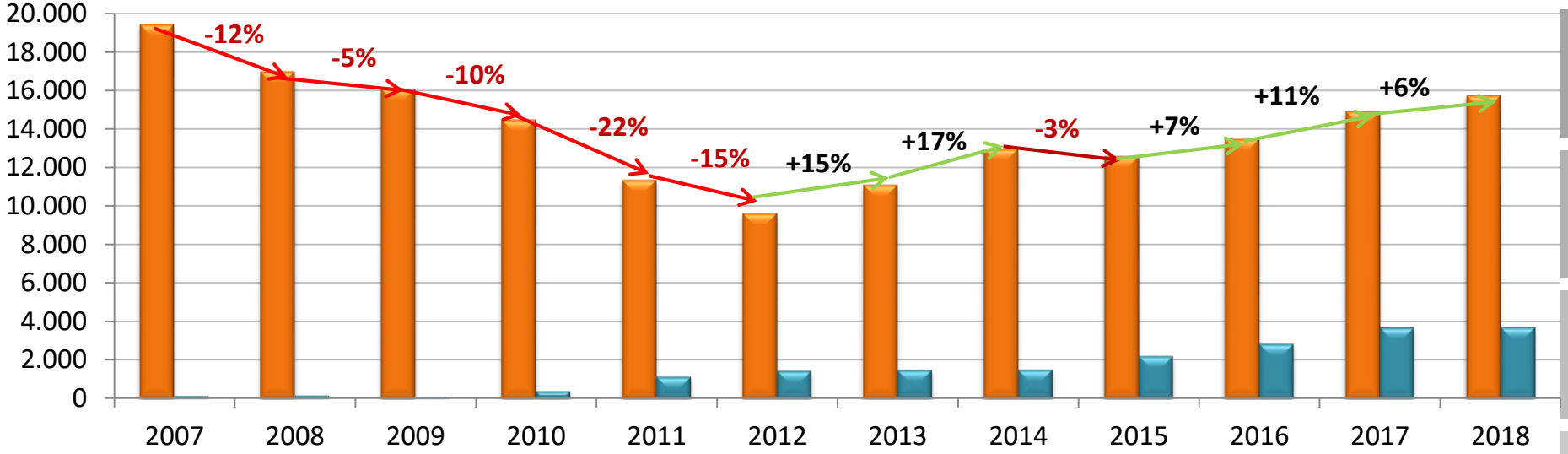
Truck and bus tyres



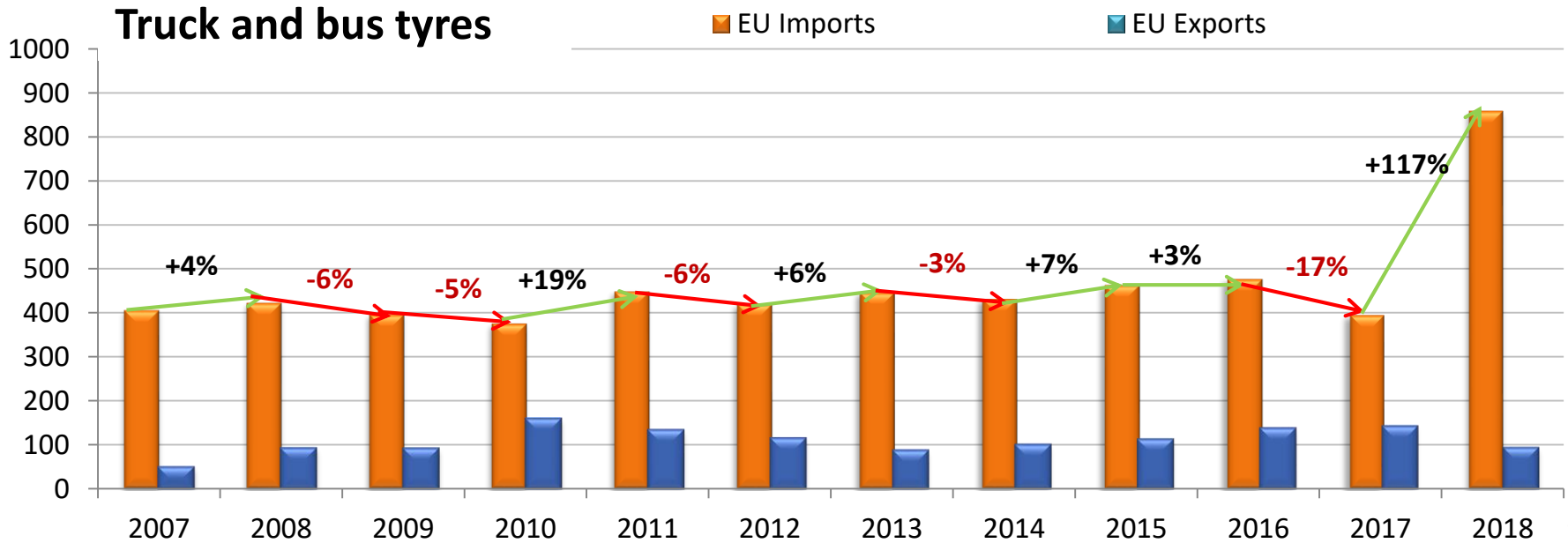
Tyre Import / export with Republic of Korea

Source: Eurostat/'000 units

Cars and light truck tyres



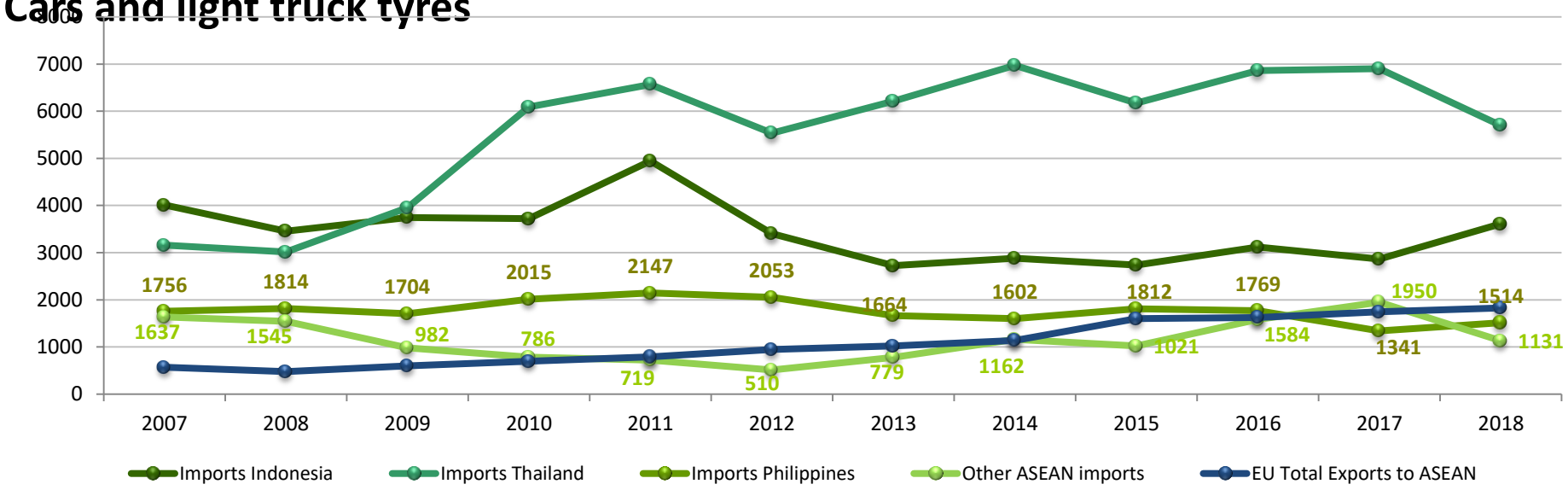
Truck and bus tyres



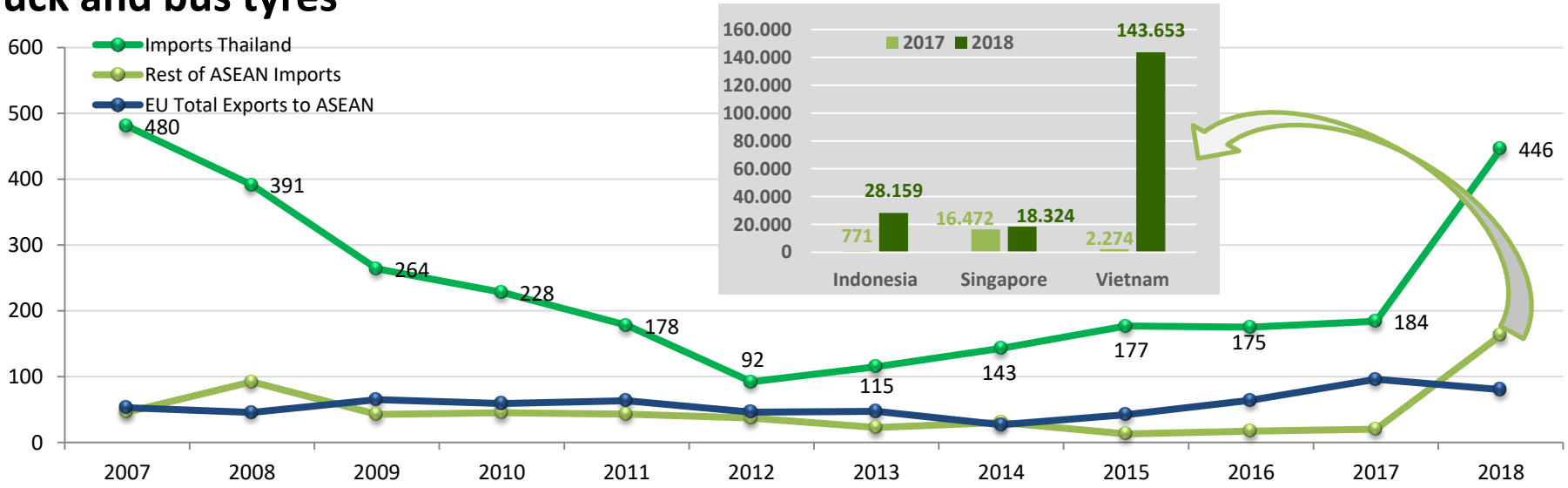
Tyre Import / export with ASEAN

Source: Eurostat/'000 units – EU28

Cars and light truck tyres



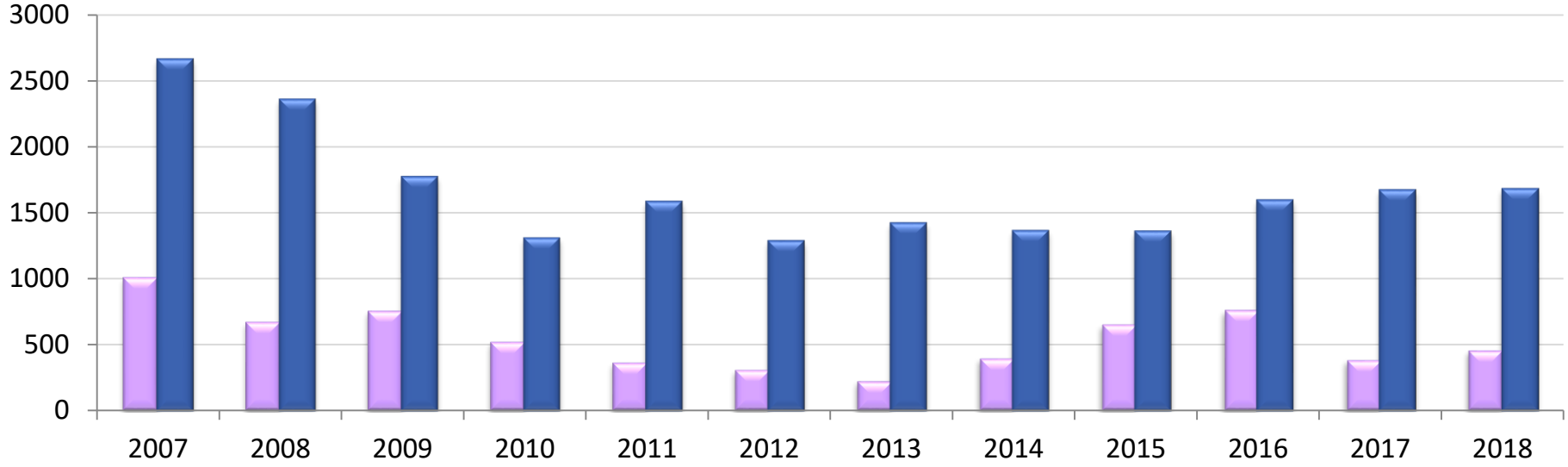
Truck and bus tyres



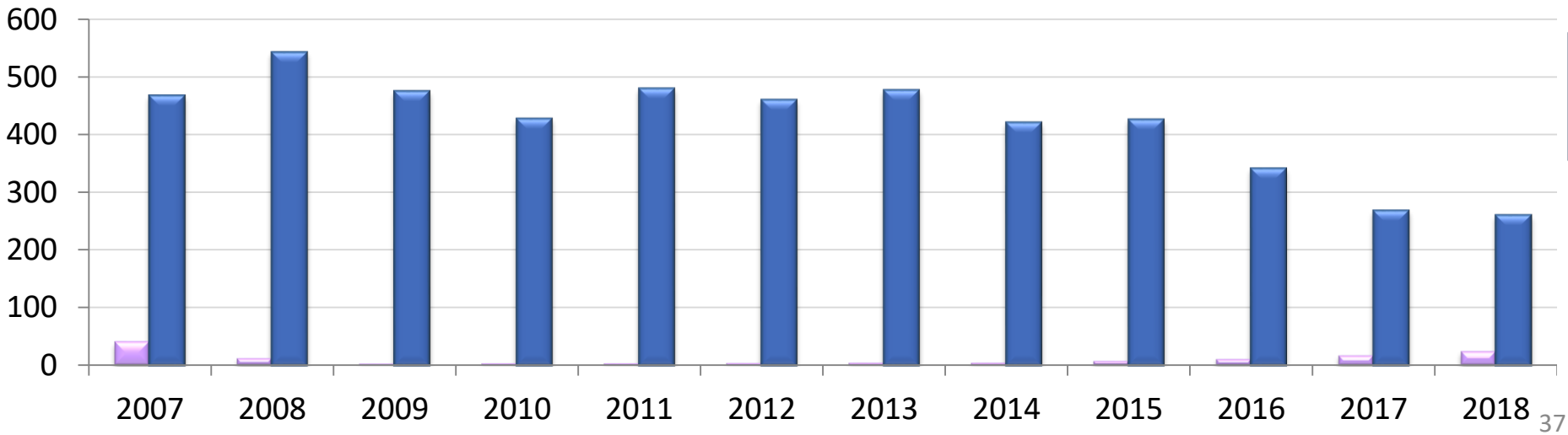
Tyre Import / export with GCC

Source: Eurostat/'000 units

Cars and light truck tyres



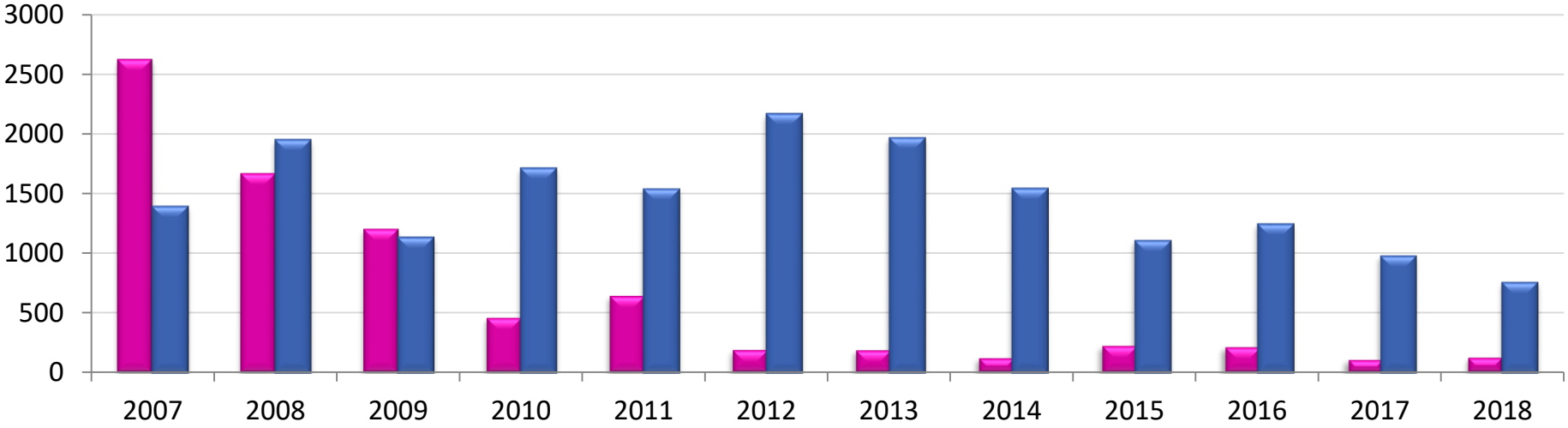
Truck and bus tyres



Tyre Import / export with Mercosur

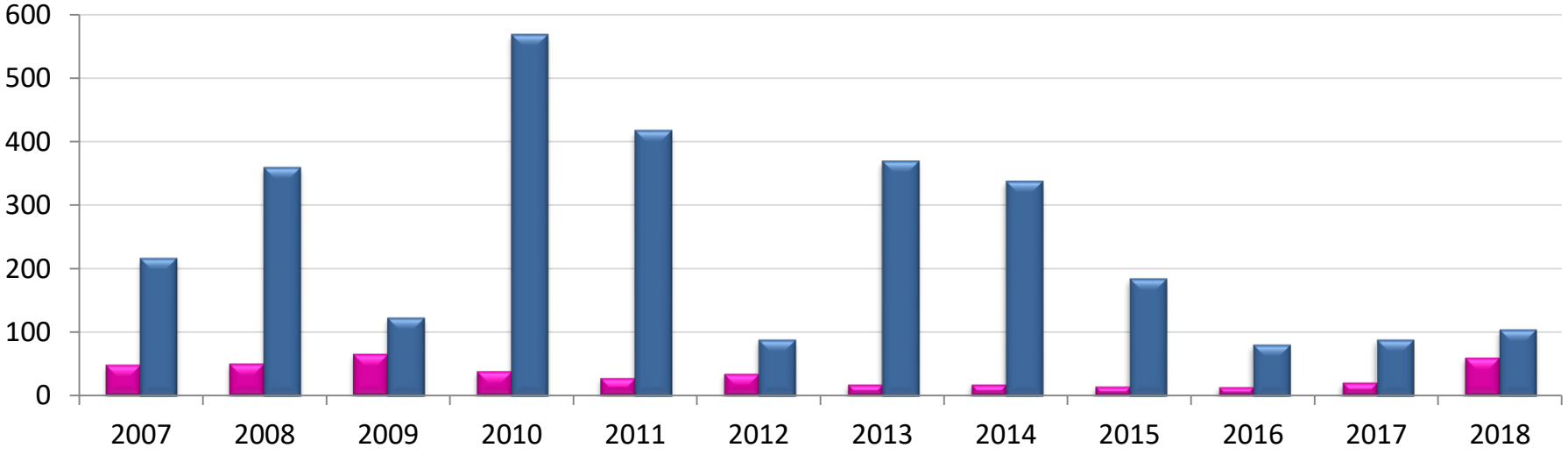
Source: Eurostat/'000 units

Cars and light truck tyres



Truck and bus tyres

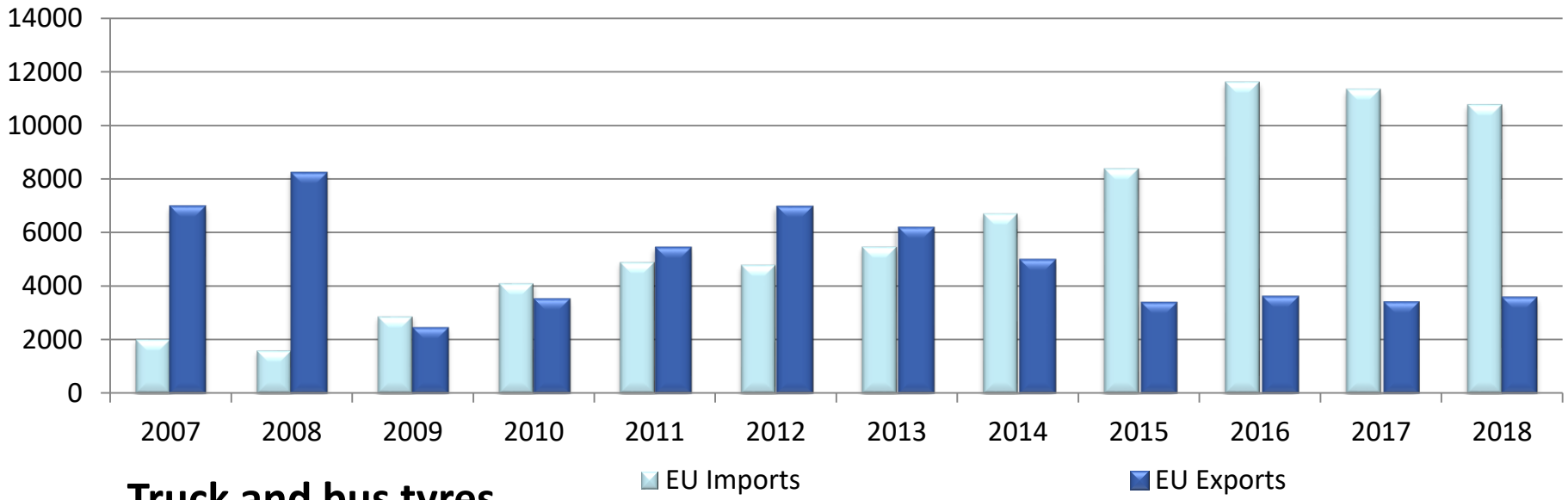
EU Import EU Export



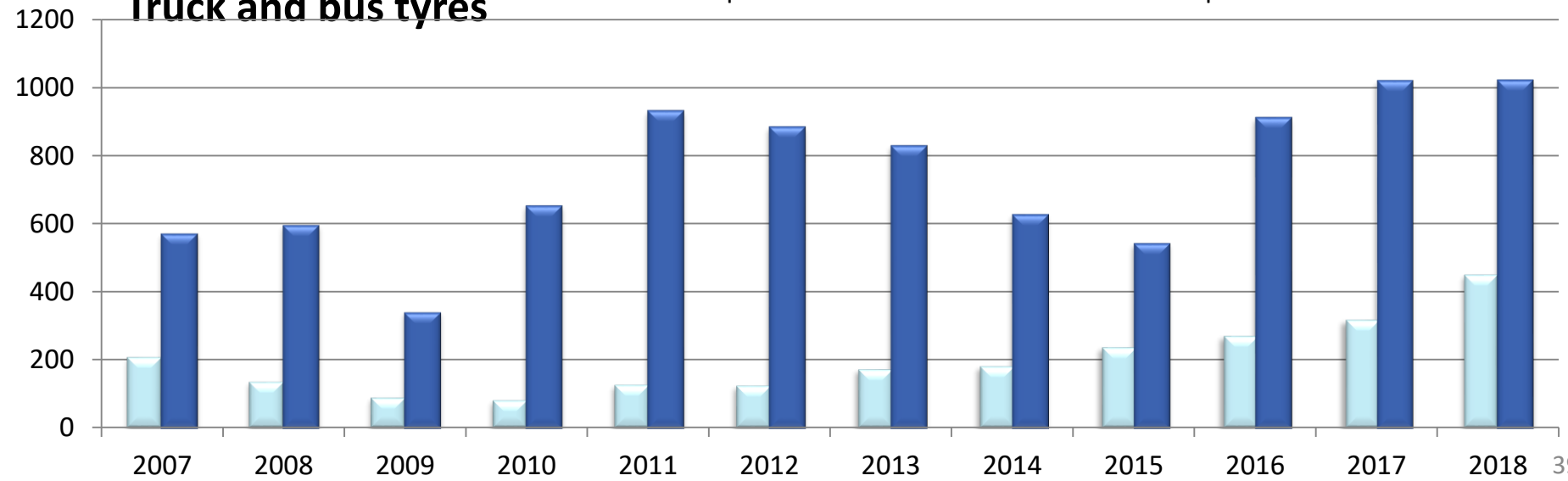
Tyre Import / export with Russia

Source: Eurostat/'000 units

Cars and light truck tyres



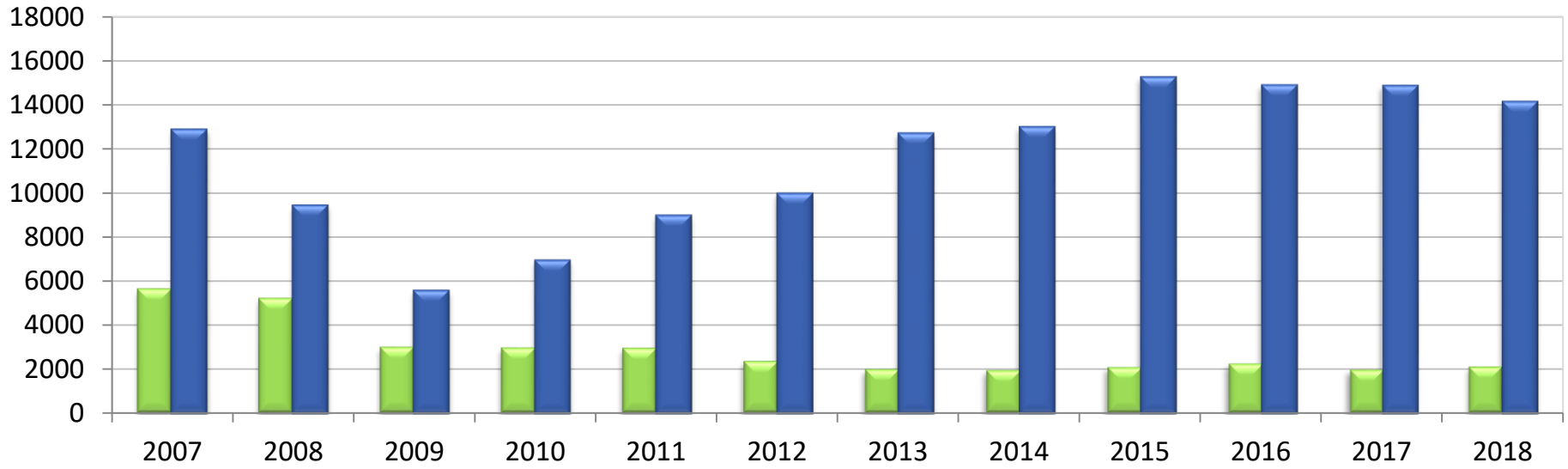
Truck and bus tyres



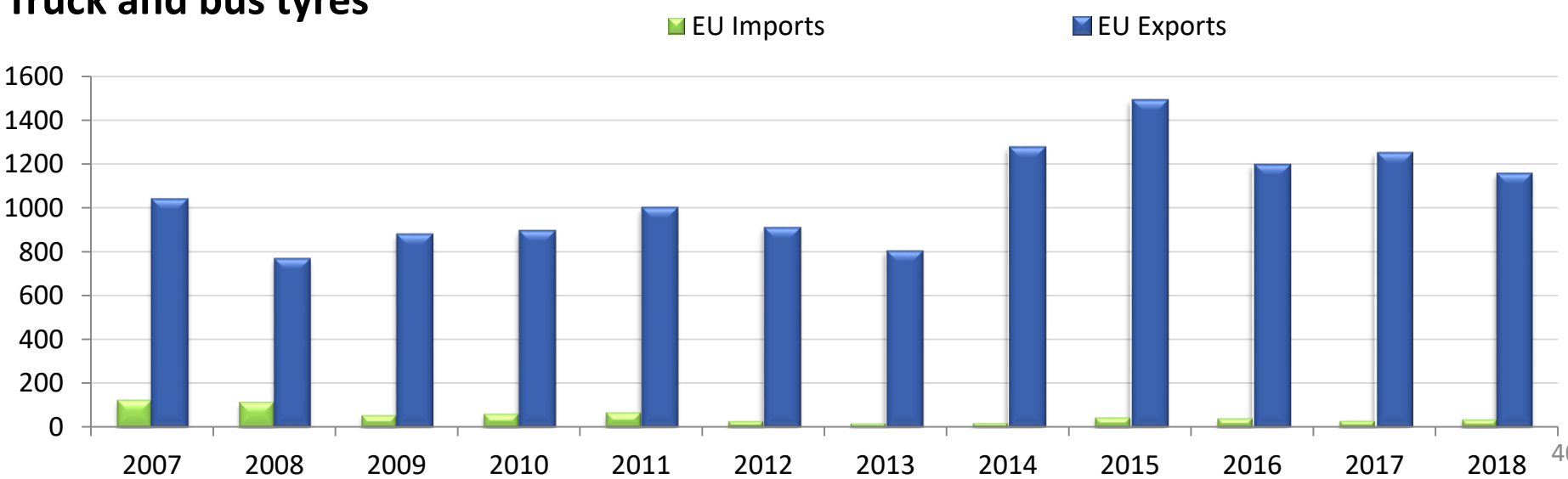
Tyre Import / export with US

Source: Eurostat/'000 units

Cars and light truck tyres



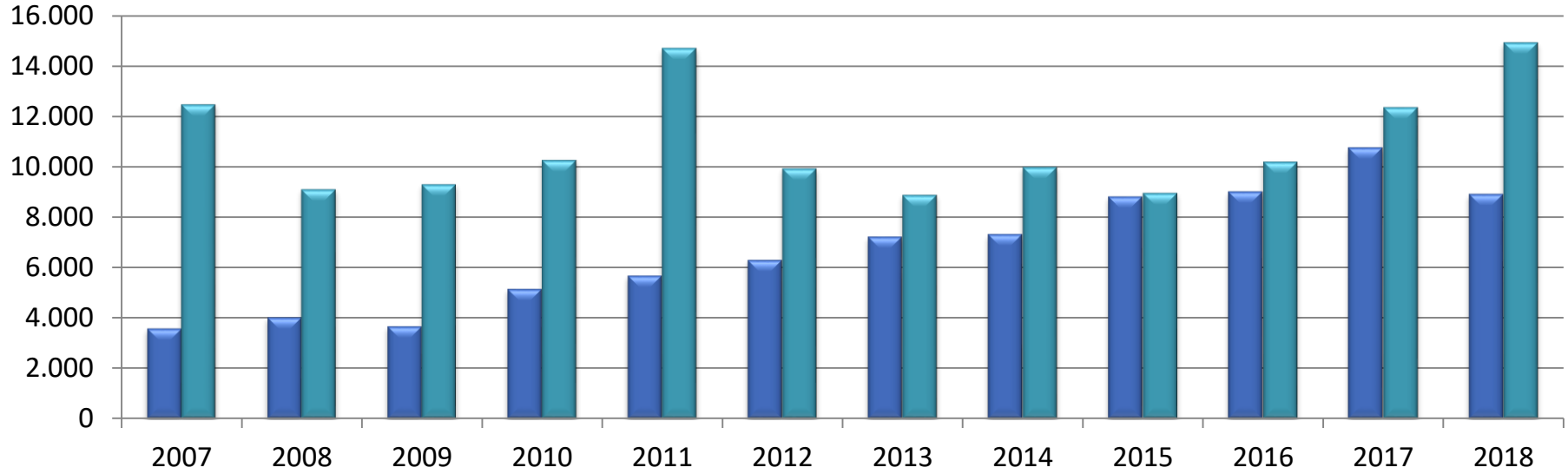
Truck and bus tyres



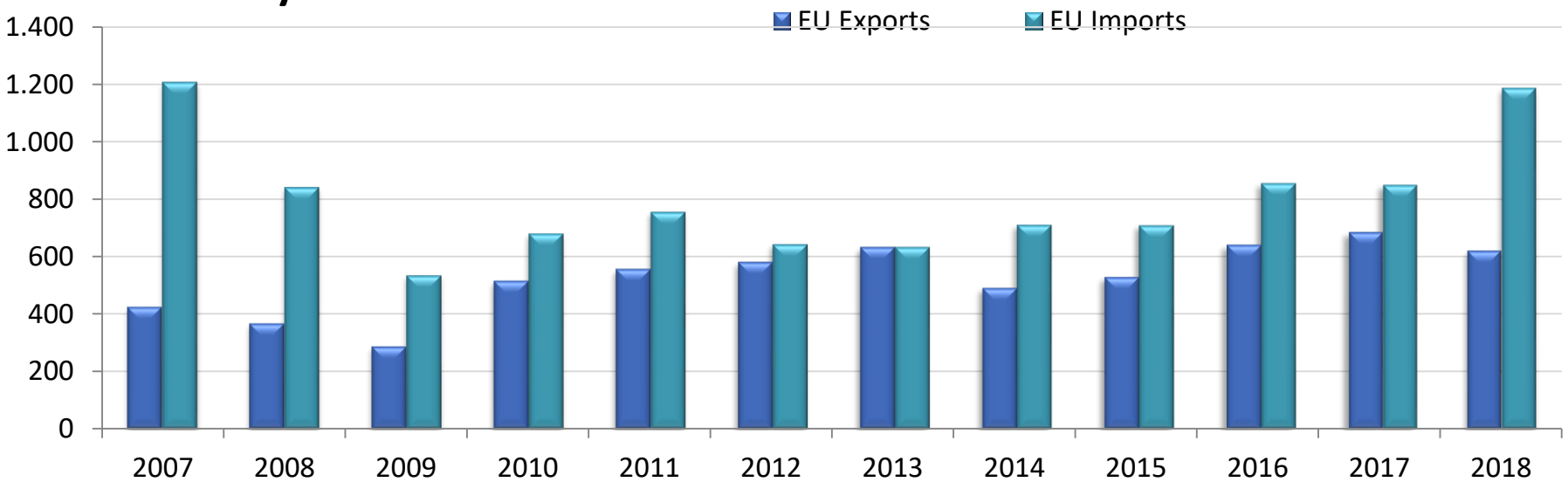
Tyre Import / export with Turkey

Source: Eurostat/'000 units

Cars and light truck tyres



Truck and bus tyres



RUBBER

EU Consumption of Natural and Synthetic Rubber remained stable in 2018.

Natural rubber:

NR consumption from key countries registered a notable raise only in China and India.

ASEAN countries produced 74% of the world's natural rubber.

72% of EU imports come from these countries, whilst Cote D'Ivoire covers 19% of EU imports.

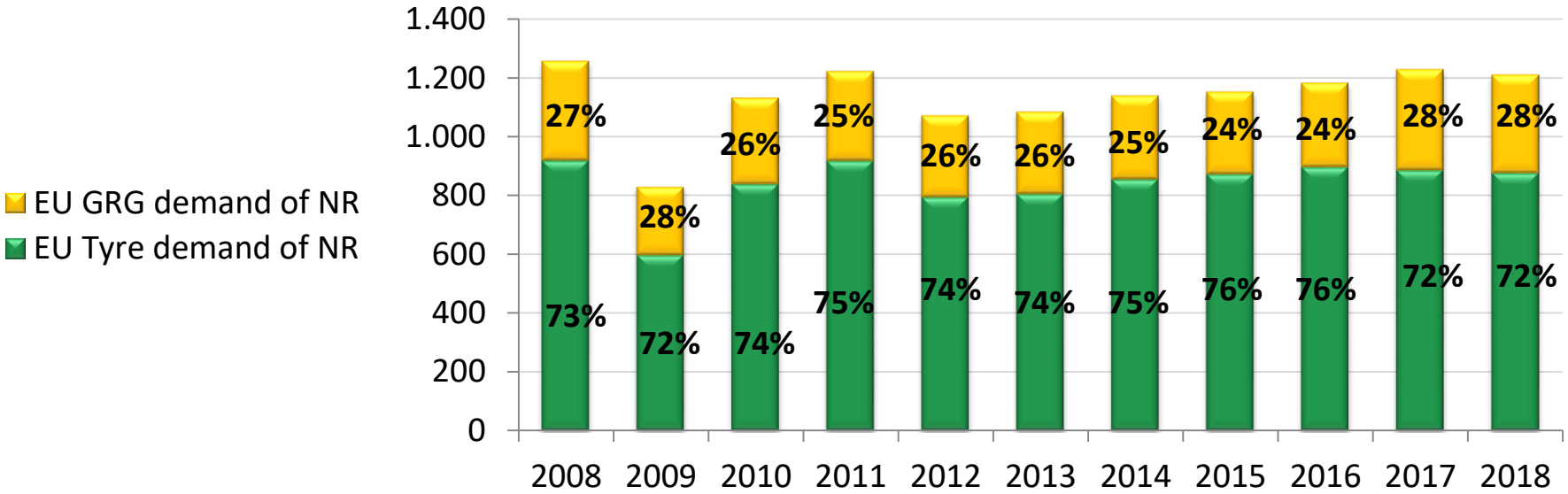
Synthetic Rubber:

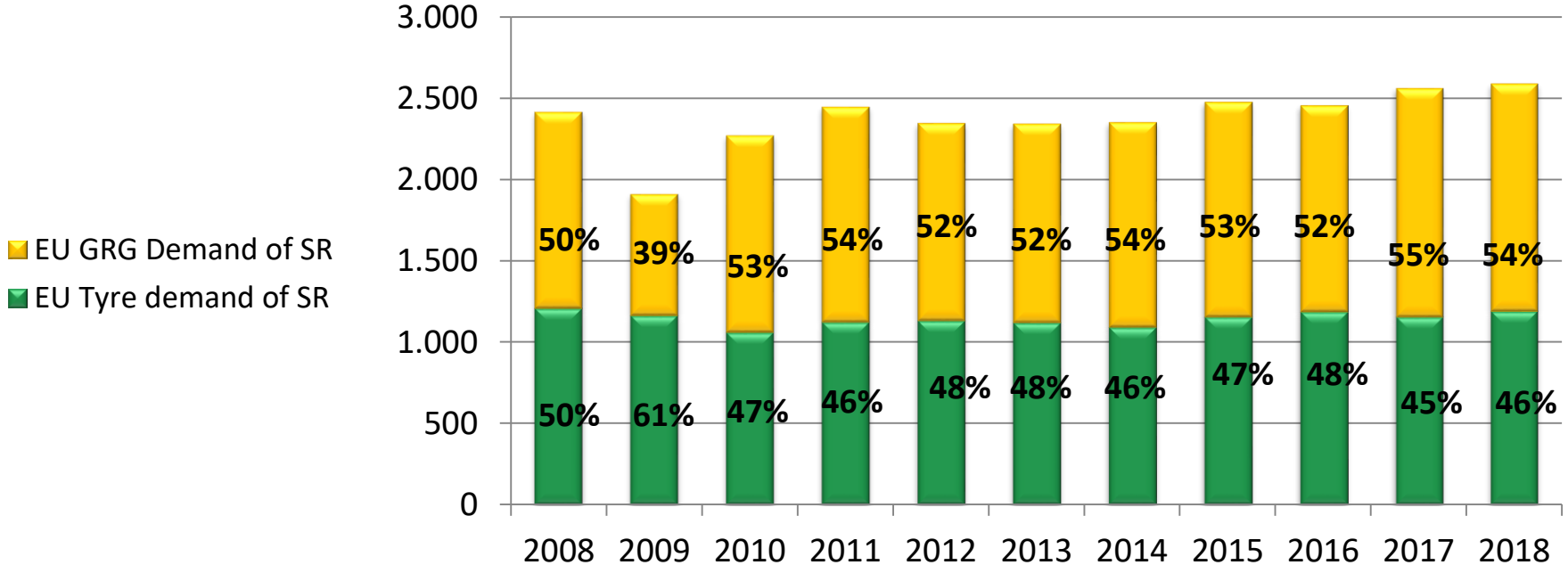
SR consumption from key countries remains stable.

China, the EU and the US are the main producers of Synthetic Rubber and are also the main users of this material.

EU Total and breakdown of consumption of rubber

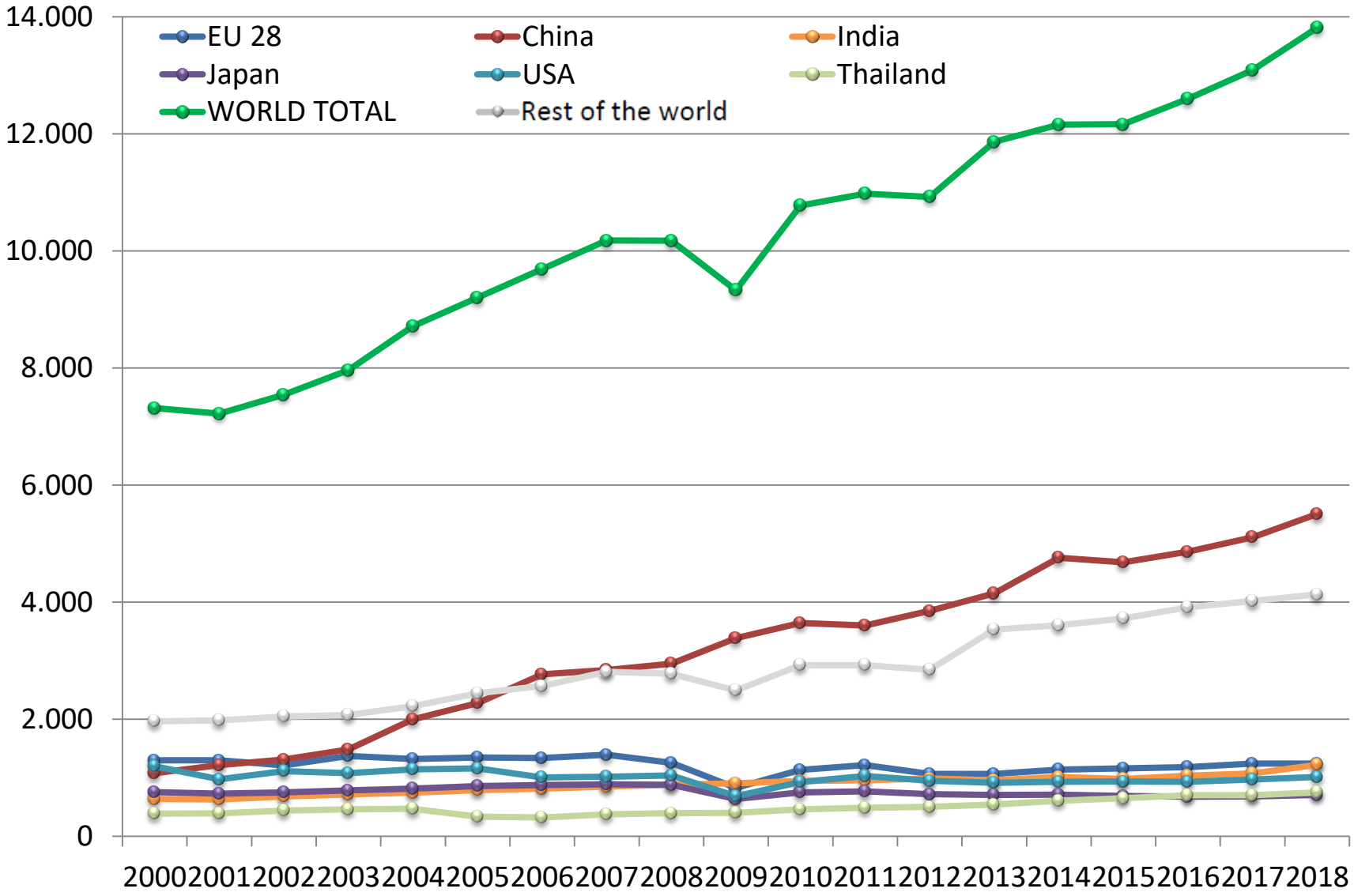
Source: IRSG /'000 tonnes





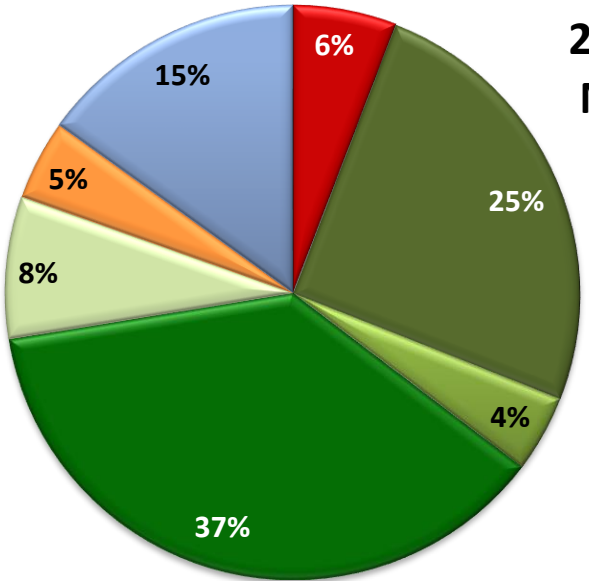
Natural rubber consumption in key countries

Source: IRSG/'000 tonnes



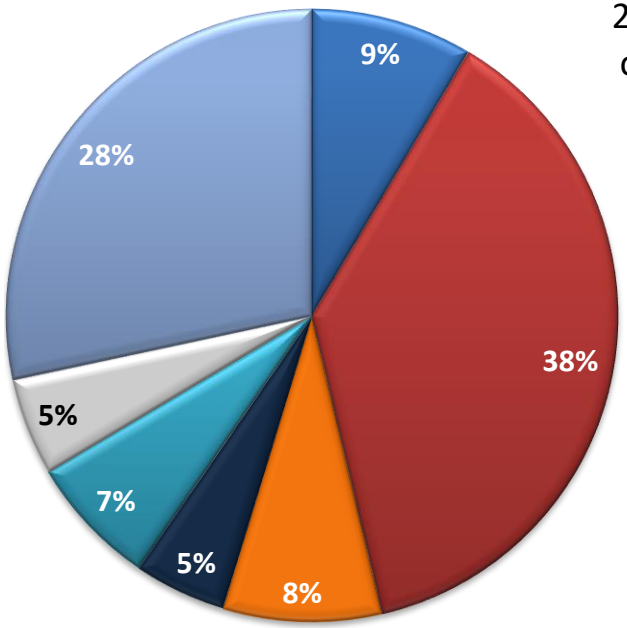
Natural rubber production / consumption / export to EU - key countries

Source: IRSG/'000 tonnes



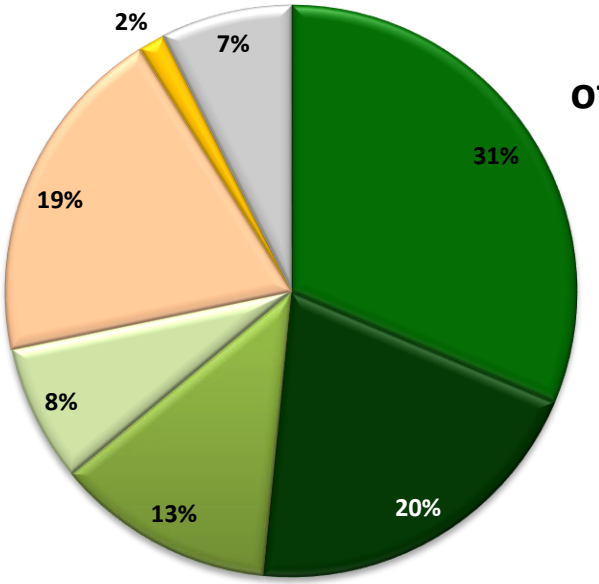
2018 Production Natural Rubber

- China
- Indonesia
- Malaysia
- Thailand
- Vietnam
- Cote d'Ivoire
- Rest of the world



2018 Consumption of Natural Rubber

- EU 28
- China
- India
- Japan
- USA
- Thailand
- Rest of the world

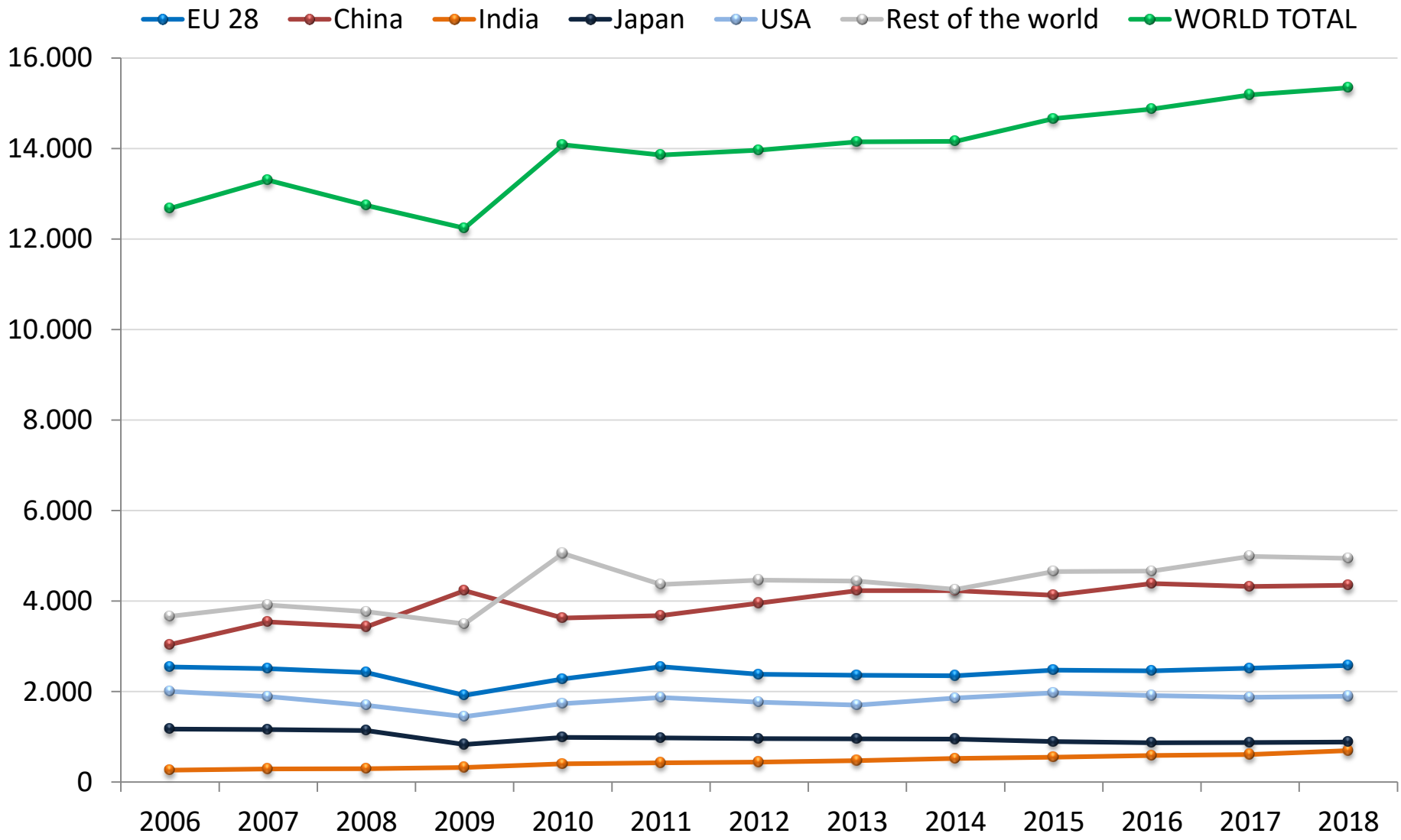


2018 Imports of Natural Rubber

- Indonesia
- Thailand
- Malaysia
- Vietnam
- Cote d'Ivoire
- Cameroon
- Rest of the world

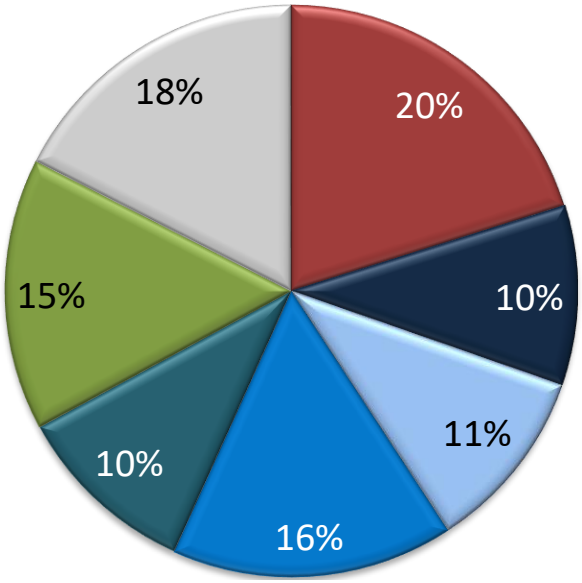
Synthetic rubber consumption in key countries

Source: IRSG/'000 tonnes



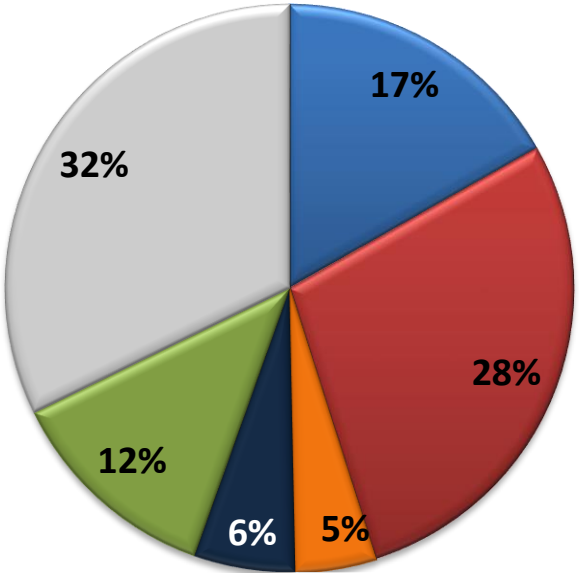
Synthetic rubber production / consumption in key countries

Source: IRSG/'000 tonnes



2018 Production Synthetic Rubber

- China
- Japan
- Korea
- EU-28
- Russia
- U.S.A.
- Rest of the world



2018 Consumption Synthetic Rubber

- EU 28
- China
- India
- Japan
- USA
- Rest of the world

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%	0%	10%	1.9%	10-15%	15%	0%	0%	40%	5%	0%	10%	0%	10%	0-3,3%	16%	3.4-4%.[1]	25%
4011.20	MHV Tyres	16-35%	16%	0%	8-10%	1.9%	10-15%	15%	0%	0%	40%	10%	0%	10%	0%	10%	2.3%	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%	0%	16%	0%	35%
4011.61/92	Agro Tyres	16%	2-16%	0%	8-25%	0%	10%	15%	0%	0%	5-30%	2-16%	0%	5%	0%	10%	0%	2-16%	0-4%	15-20%

[1] Of Free-on-Board (FOB) value

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[2]	Peru	Russia	Singapore	Thailand	Ukraine[1]	Uruguay	USA	Vietnam[1]
4011.10	Car Tyres	4.5%	4.5%	0%	4.5%	0%	0%	0%	0%	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%	0%	4.5%	0%	0%	0%	0%	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%	0%	4.5%	0%	0%	0%	3.4%	0%	4.5%	0%	0%	4.5%	4.5%	4.5%	0%	4.5%	4.5%	0%
4011.61/92	Agro Tyres	4%	4%	0%	4%	0%	0%	0%	4%	0%	4%	0%	0%	4%	4%	4%	0%	4%	4%	0%

[1] GSP Beneficiary
[2] GSP+

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%	0-5%	10%	5%	0%	0%	5-30%	11-14%	0%	5%	0%	5-30%	0%	14%	0-3,3%	3%
4009	Tubes , pipes hoses	14%	14%	0,0	10%	0-5%	10%	5%	0%	0%	30%	10%	0%	3%	0%	3-10%	0%	14%	2,5%	3%
4010	Conveyor and transmission belts	14%	14%	0%	8-10%	0%	10%	5%	0%	0%	30%	10-14%	0%	5%	0%	7-10%	0%	14%	1,9-8%	5-15%
4015	Apparel+clothing accessories	16%	16%	0%	8-10%	0-7.3%	10%	10%	0%	0%	0-15%	16%	0-3.3%	10%	0%	7-10%	0%	16%	0-4%	5-20%

[1] Of Free-on-Board (FOB) value

When importing from the trading partner country to the EU

Code	Products	Argentin	Brazil	Canada	China	Colombia	India[1]	Indonesia[1]	Japan	Korea	Malaysia	Paraguay[2]	Peru	Russia	Singapore	Thailand	Ukraine[1]	Uruguay	USA	Vietnam[1]
4008	Plates, sheets, strips, rods, profile shapes*	3%	3%	0%	3%	0%	0%	0%	0%	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%	3%	0%	3%	0%	0%	0%	0%	0%	3%	0%	0%	3%	3%	3%	0%	3%	3%	0%
4010	Conveyor and transmission belts*	6,5%	6,5%	0%	6,5%	0%	0%	0%	0%	0%	6,5%	0%	0%	6,5%	6,5%	6,5%	0%	6,5%	6,5 %	0%
4015	Apparel+clothing accessories*	2%	2%	0%	2-5%	0%	0%	0%	0%	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
[2] GSP+
* Certain products at 8 digit level can be subject to the Airworthiness Tariff Suspension (0%) or to the Suspension for goods for certain categories of ships, boats and other vessels and for drilling or production platforms (0%)

Notes

60th anniversary

Driving change since 1959

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EUROPEAN TYRE & RUBBER manufacturers' association