

European Tyre & Rubber Industry

Statistics

EDITION 2021



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 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

ETRMA

2019/2020 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

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

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Appendix: Export and Import Tariffs

ETRMA's Members

Tyre Corporate*

APOLLO
TYRES LTD

BRIDGESTONE

Continental
The Future in Motion

GOODYEAR

HANKOOK
driving emotion

NEXEN
NEXEN TIRE
we got you

MICHELIN
UNE MEILLEURE FAÇON D'AVANCER

NOKIAN
TYRES

PIRELLI

TRELLEBORG

SUMITOMO
RUBBER INDUSTRIES

National Associations

General Rubber Goods

ASSOGOMMA
Federazione Gomma Plastica

CONSORCIO NACIONAL DE
INDUSTRIALES DEL CAUCHO

Kumiteollisuus ry

VERENIGING
NVRTRA
TECHNISCHE RUBBER ARTIKELEN

sncp
wdk

Affiliated Members*

BriSA
BRISA BRIDGESTONE SABANCI
TYRE MANUFACTURING AND TRADING INC.

MARANGONI

PROMETEON

ASOCIACE
VÝROBCŮ
PNEUMATÍK

ASOCIÁCIA
VÝROBCOV
PNEUMATÍK

BTMA
British Tyre Manufacturers' Association

HUNGARIAN
TIRE
ASSOCIATION
HTA
MAGYAR
GUMIABRONCS
SZÖVETSEG

POLISH
TIRE
INDUSTRY
ASSOCIATION

From 2022, Nexen and Tyre National Association from the Czech Republic and Slovakia will join ETRMA. Their data will not be included in this booklet until then.

2019/2020 Key Figures

ETRMA

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Source: ETRMA, Eurostat, LMC, ERJ

LEGEND



2019



2020



Tyre



GRG

(e) estimated
*except for export/import figures
and tyre sales



Truck



Passenger car

DIRECT EMPLOYMENT^(e)



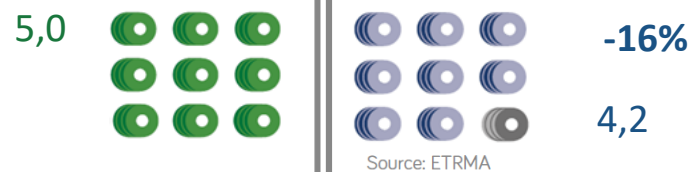
NUMBER OF COMPANIES^(e)



GRG PRODUCTION IN MILLION TONNES^(e)



TYRES PRODUCTION IN MILLION TONNES^(e)



SECTOR^(e) TURNOVER

Source: Etrma

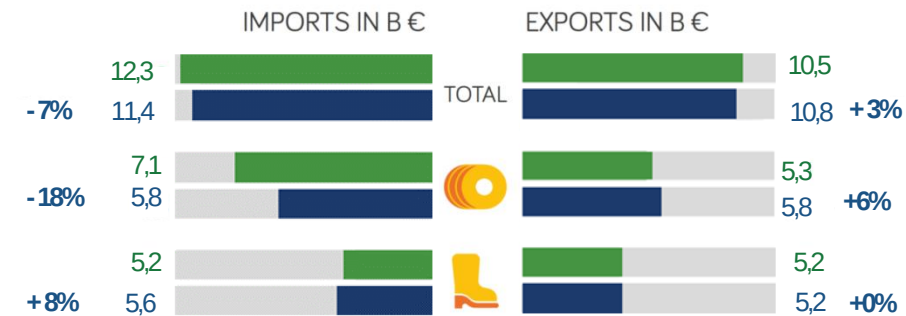


COMPRISING 70% OF THE WORLD
TYRE INDUSTRY TURNOVER



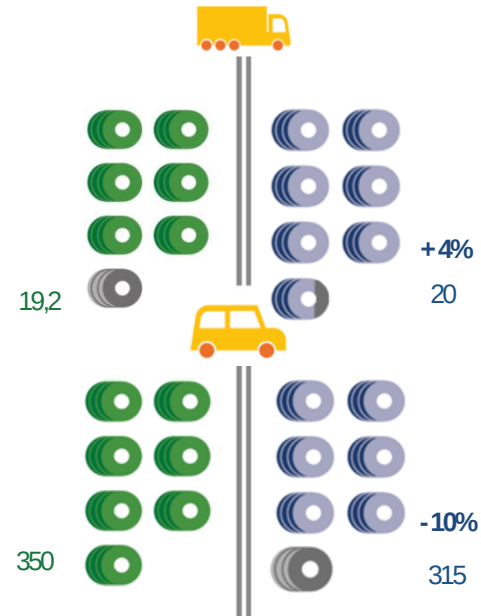
2019/2020 Key Figures

Source: ETRMA, Eurostat, LMC, ERJ

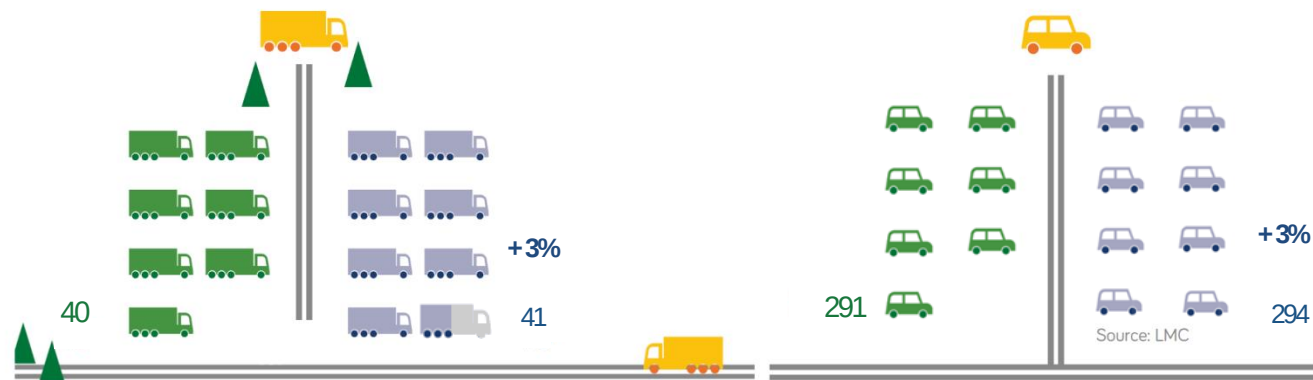


2020 trade refers to EU27 (UK became a third market)

TYRE SALES IN MILLION OF UNITS



VEHICLE PARC IN MILLION OF UNITS



Source: LMC

Vehicle Data

ETRMA

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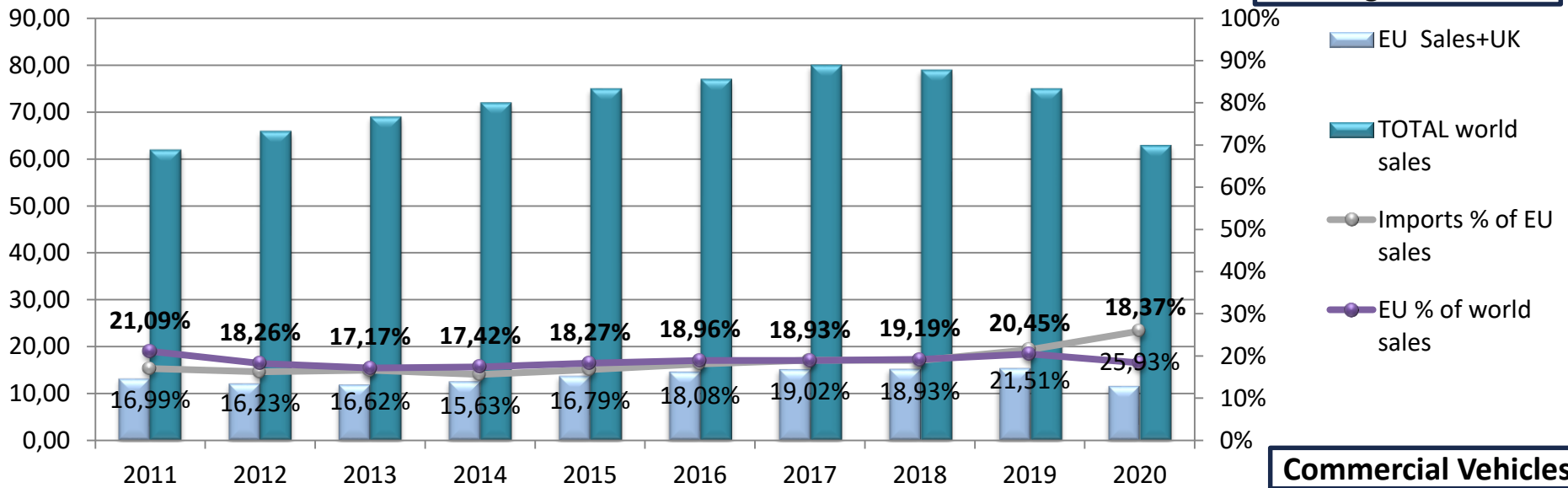
RUBBER

Appendix: Export and Import Tariffs

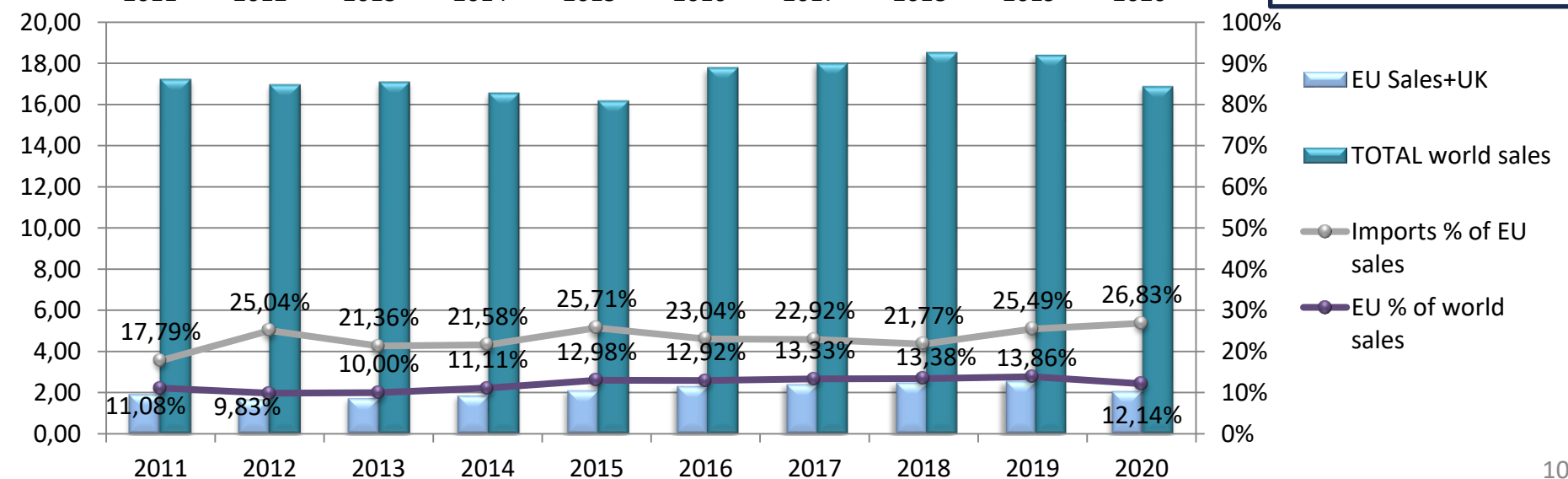
Sales and imports of passenger cars, LCV and MHCV in the EU and the world

Source: ACEA and Eurostat/in '000.000 units

Passenger Cars



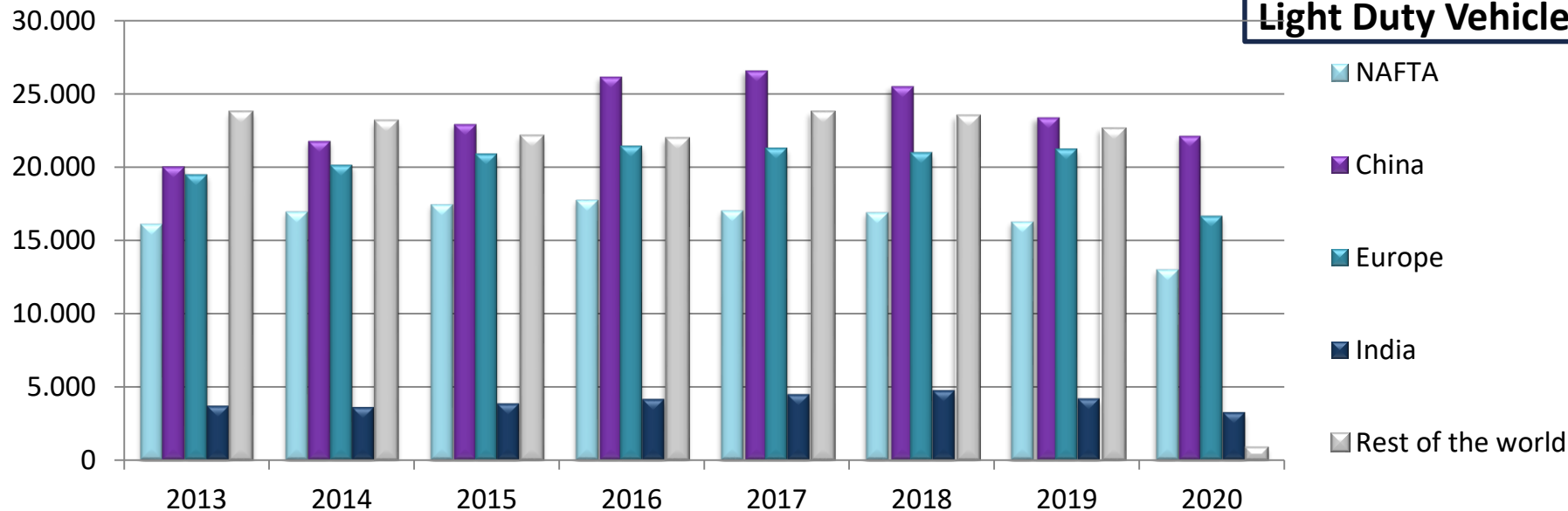
Commercial Vehicles



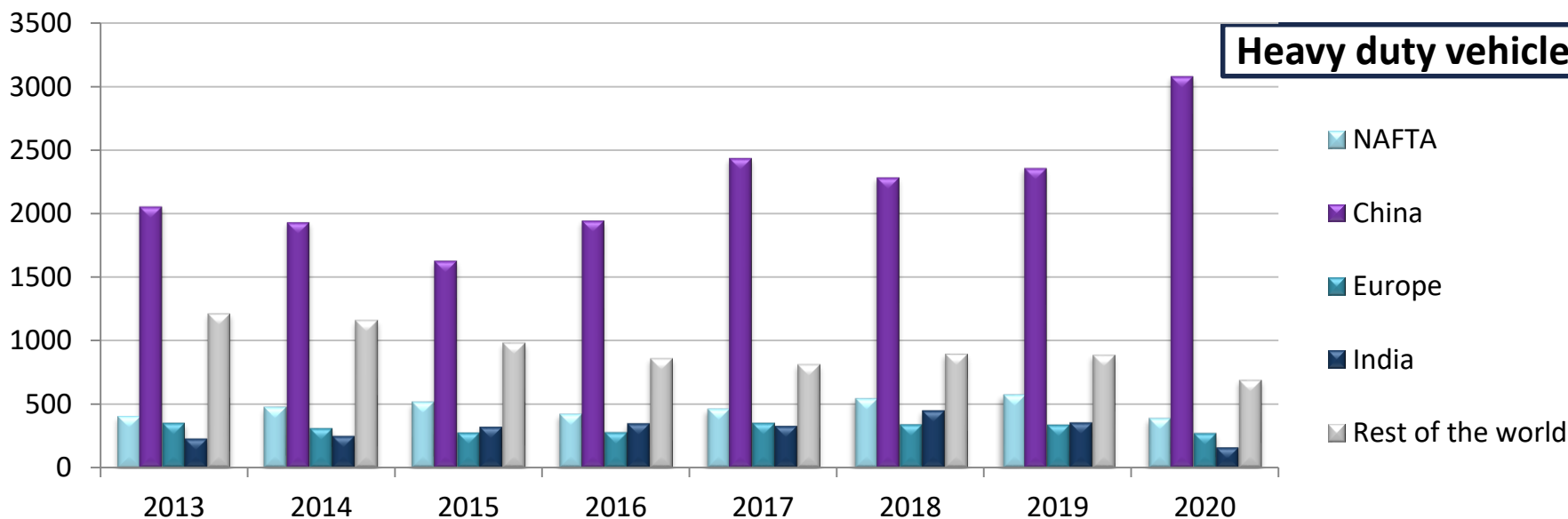
Production of passenger cars, LCV and MHCV - major markets

Source: OICA/ in '000 units

Light Duty Vehicles



Heavy duty vehicles



GENERAL RUBBER GOODS

ETRMA

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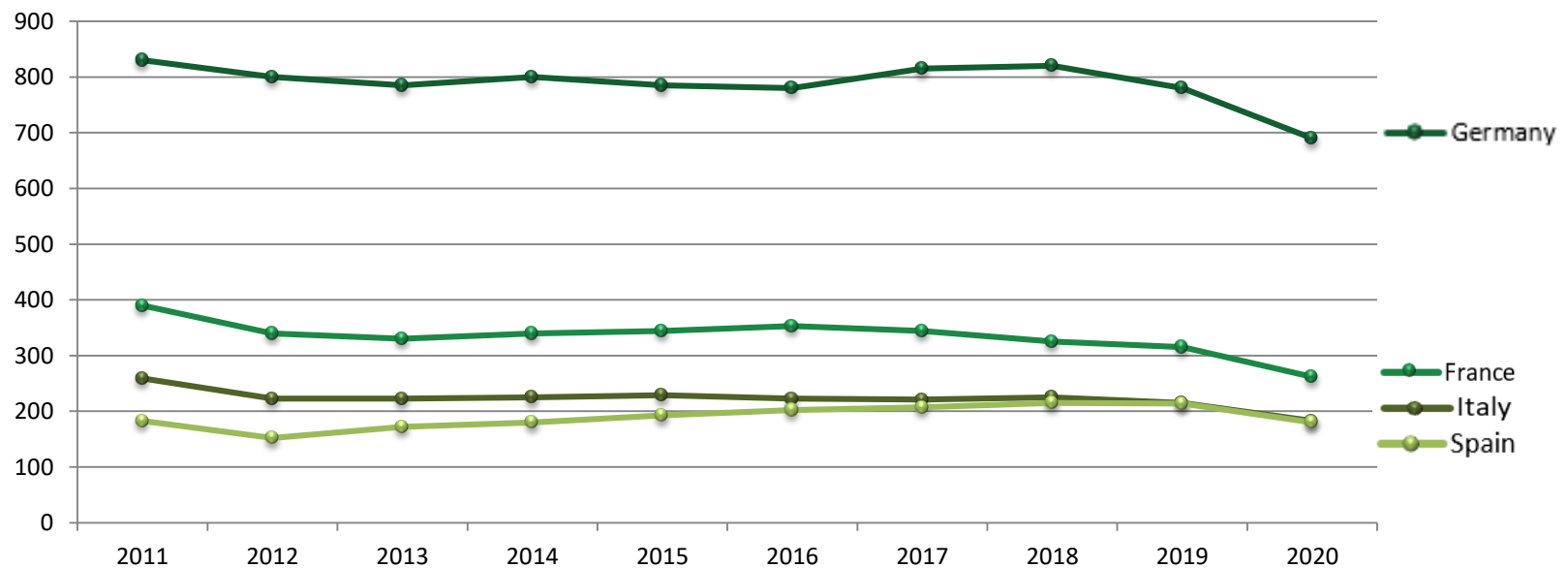
RUBBER

Appendix: Export and Import Tariffs

Evolution of GRG production*

Source: ETRMA/in '000 tonnes

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
France	390	340	330	340	344	353	344	325	315	262
Germany	830	800	785	800	785	780	815	820	780	690
Italy	259	223	223	225	229	223	221	225	215	183
Spain	183	168	172	180	193	202	207	215	214	180



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

Top 10 global GRG companies

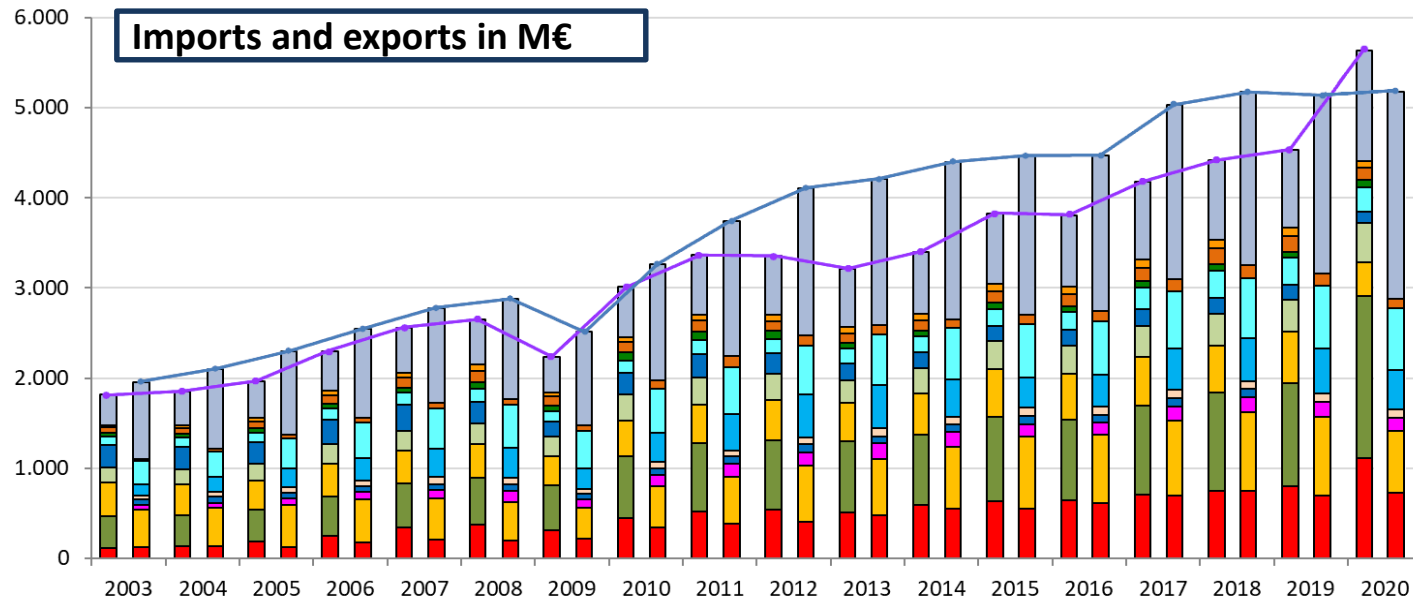
Source: ERJ

Rank 2019	Rank 2020	Company	Headquarter	2019 Non tyre rubber sales in \$M	2020 Non tyre rubber sales in \$M	Variation
2	1	Freudenberg Group(e)	Germany	6,36	6,03	 -5%
1	2	Continental Ag(e)	Germany	6,47	5,57	 -14%
3	3	Hutchinson SA	France	4,83	4,31	 -11%
4	4	Sumitomo Riko (e)	Japan	3,89	4,04	 4%
5	5	Bridgestone Corp. (e)	USA	3,24	3,37	 4%
8	6	Parker Hannigin Corp.	Japan	2,92	3,29	 13%
9	7	NOK Inc. (e)	USA	2,91	2,97	 2%
6	8	Gates Corp (e)	USA	3,09	2,79	 -10%
10	9	Trelleborg AB(e)	Sweden	2,86	2,61	 -9%
11	10	Reckitt Benckiser Group	UK	2,12	2,33	 10%

(e)= estimate

GRG° Import/Export

Source: Eurostat



EU imports

EU exports

Other

Non EU Europe

South Korea

Japan

India

RussiaUkraine

Indonesia

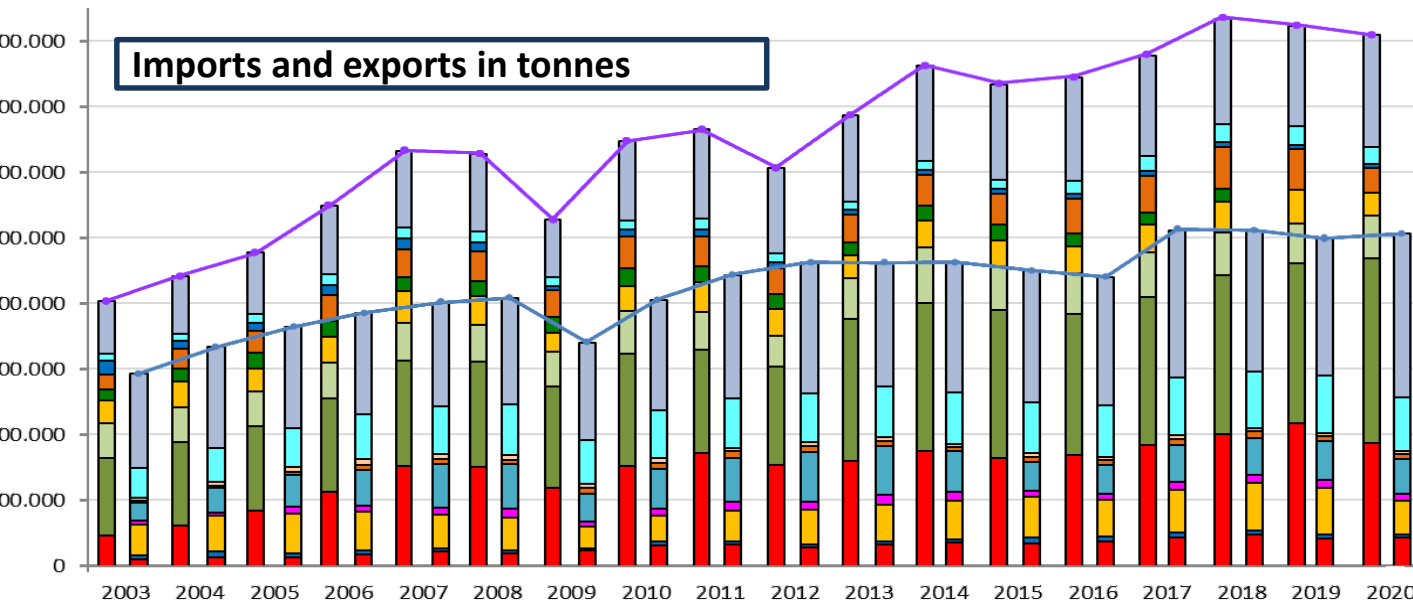
United States

BRAZIL

Thailand

Malaysia

China



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

TYRES

ETRMA

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ETRMA tyre manufacturers' plants

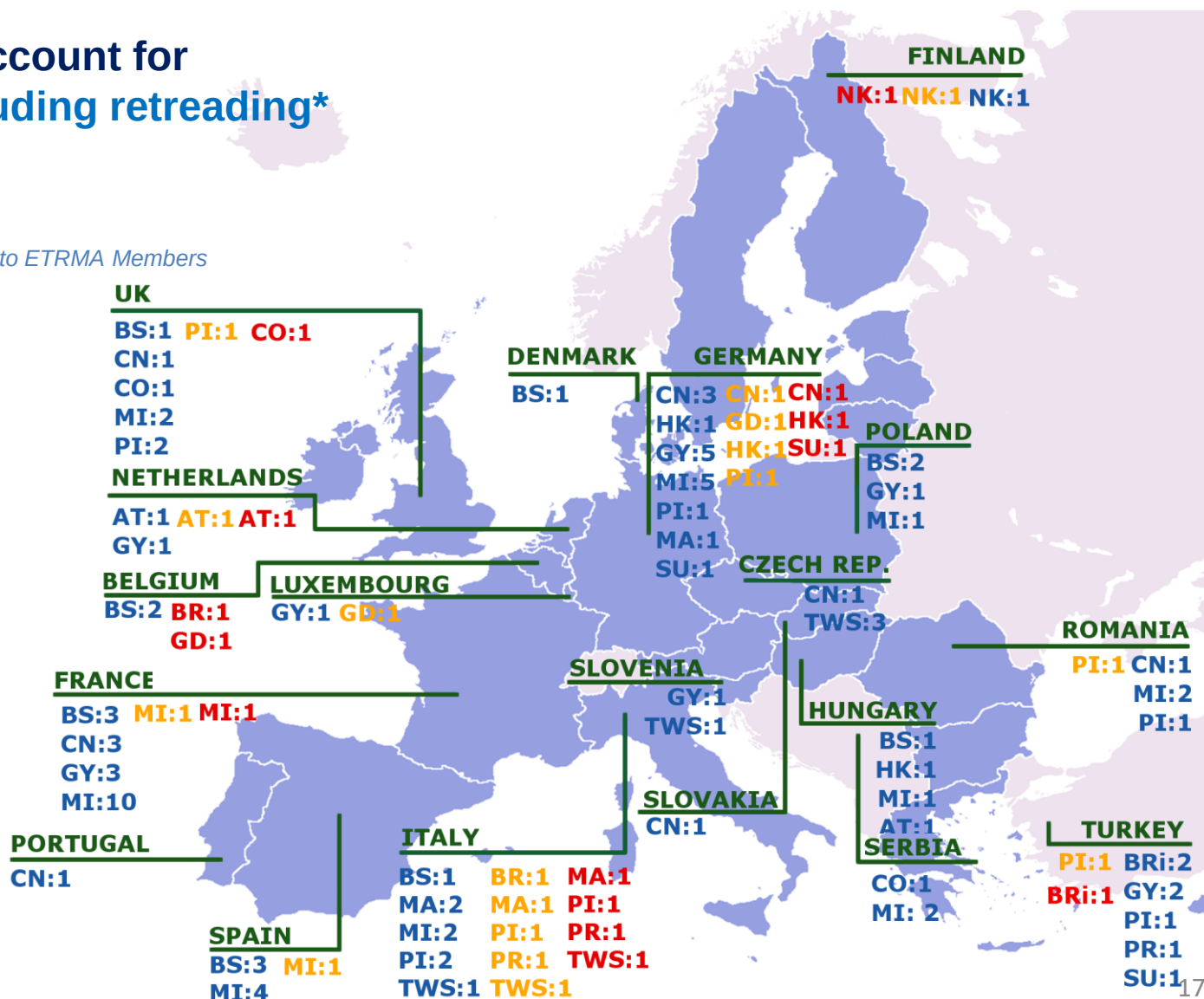
Situation at Dec 2020

- ETRMA members account for
- 93 tyre plants, including retreading*
- 17 R&D centres
- 14 HQs

*Only retreading operations belonging to ETRMA Members

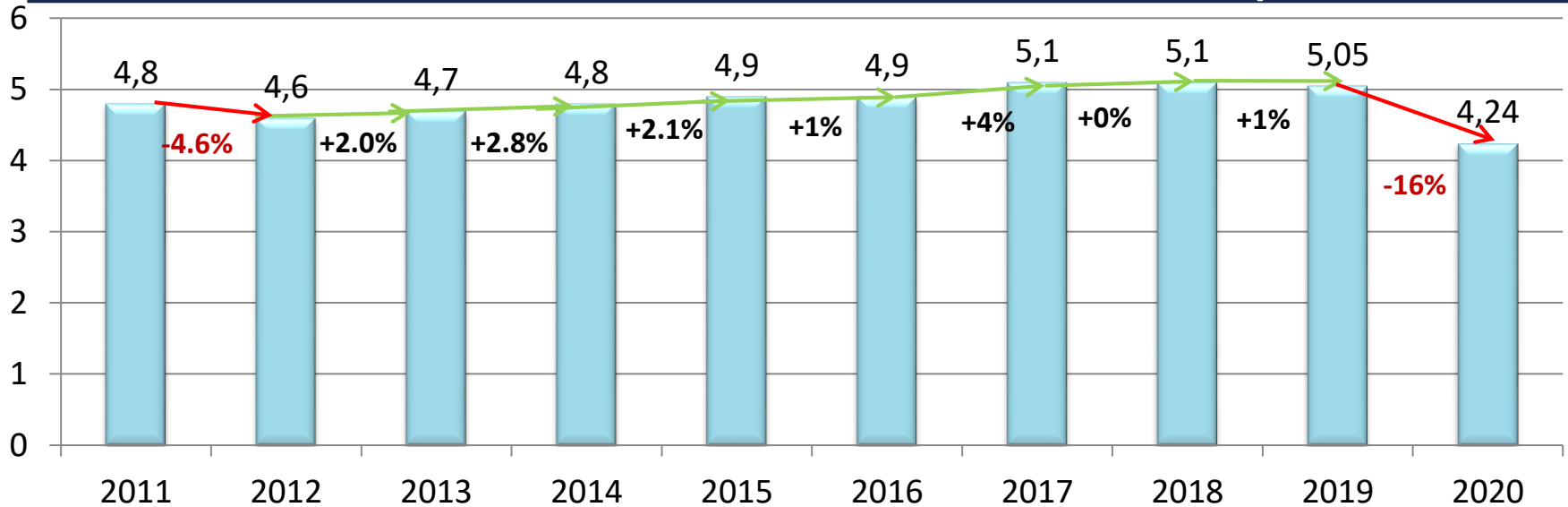
**2021 Goodyear acquires Cooper

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



EU tyre production and global ranking of world tyre companies' sales

Source: ETRMA/'000.000 tonnes and ERJ (Exchange rate \$-->€ (03/11/2021))

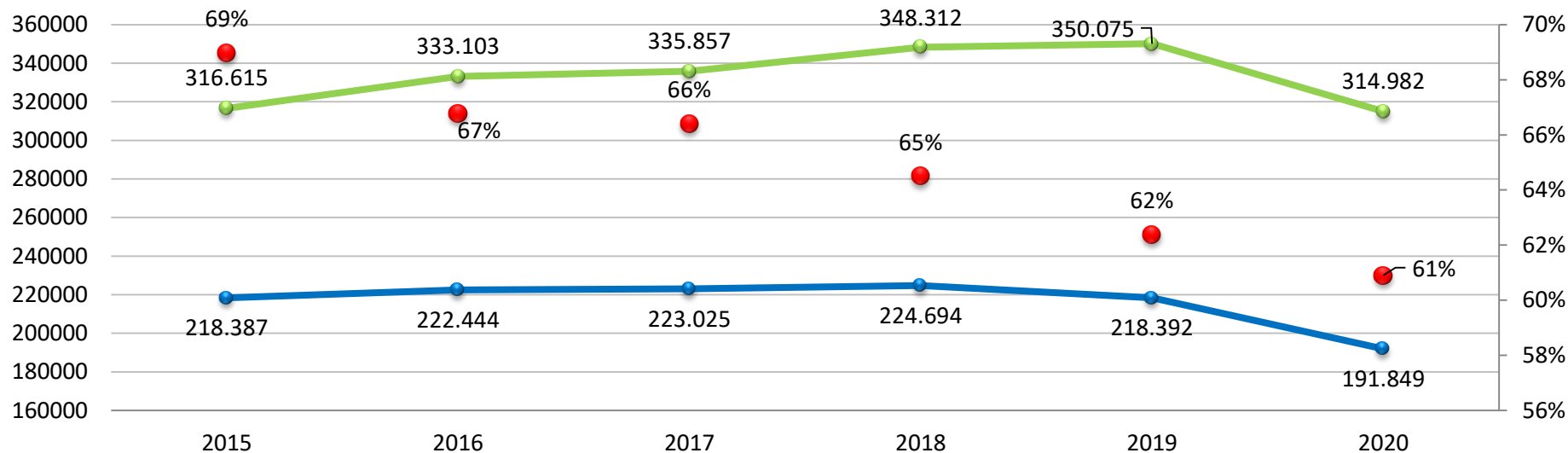


2020	2019	Company	Headquarter	2020 sales in €M	2019 sales in €M	Variation
1	1	Michelin	France	19.908	21.701	↓ -8%
2	2	Bridgestone	Japan	18.012	21.115	↓ -15%
3	3	Goodyear	USA	9.930	11.883	↓ -16%
4	4	Continental	Germany	8.600	9.787	↓ -12%
5	5	Sumitomo	Japan	5.528	6.128	↓ -10%
6	7	Hankook	South Korea	4.605	4.969	↓ -7%
7	6	Pirelli	Italy	4.244	5.152	↓ -18%
8	8	Yokohama	Japan	3.775	4.175	↓ -10%
9	10	ZC Rubber	China	3.382	3.112	↑ 9%
10	9	Maxxis	Taiwan	3.289	3.392	↓ -3%

Annual sales trends on the European tyre replacement market

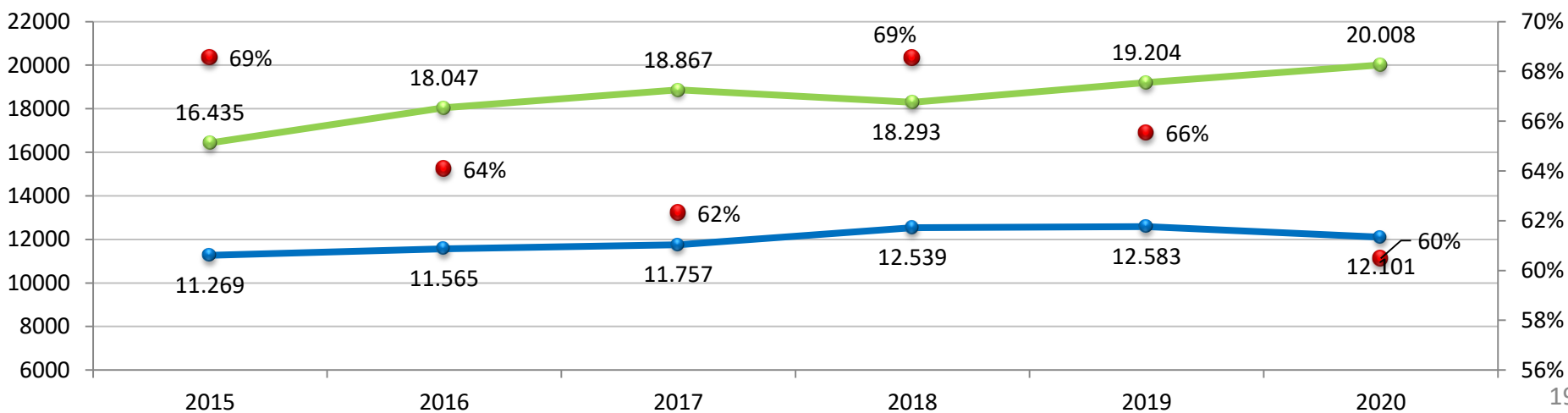
Source: Europool and Eurostat/in '000 units / replacement market

Cars and light truck tyres HS Code: 40111000; 40112010



Truck and bus tyres HS Code: 4011.2090

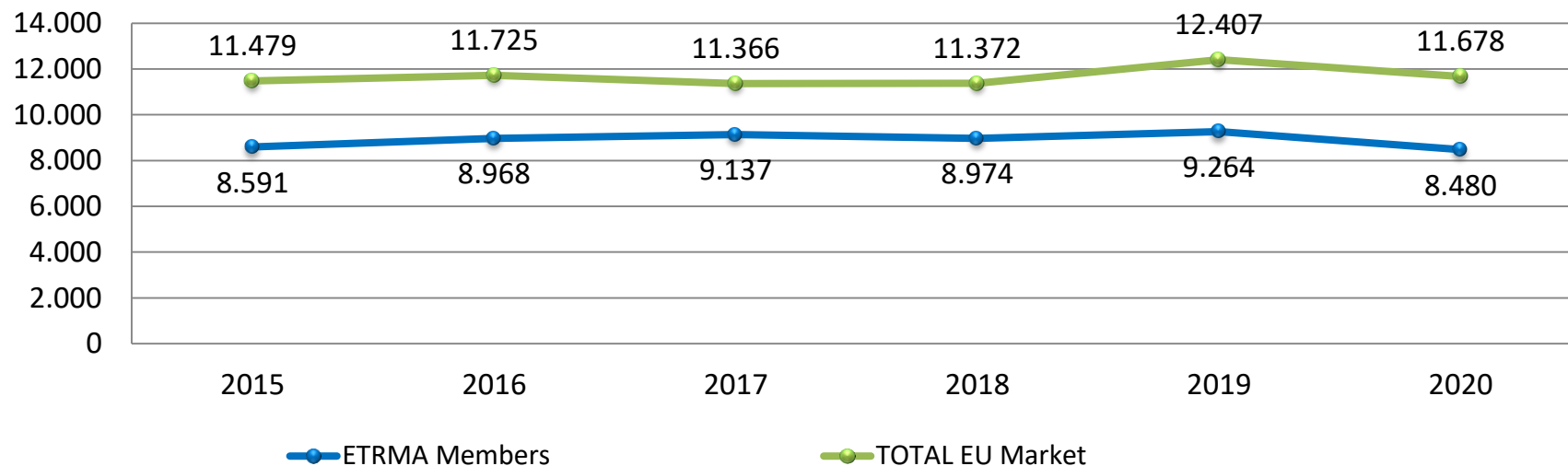
ETRMA Members TOTAL MARKET % of ETRMA sales on EU sales



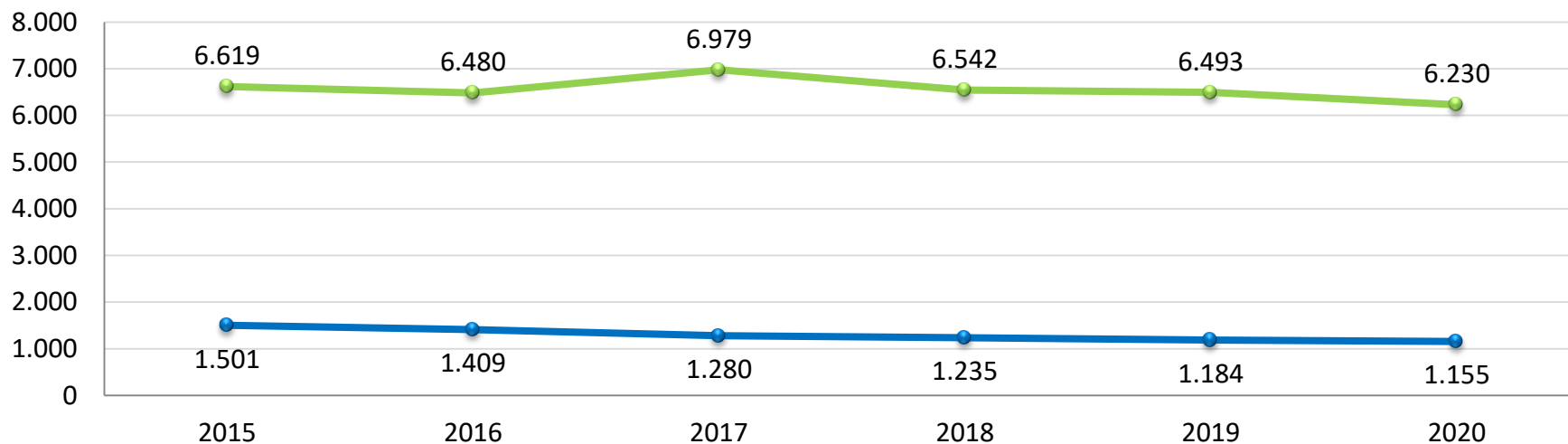
Annual sales trends on the European tyre replacement market

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

Motorcycle and scooter tyres



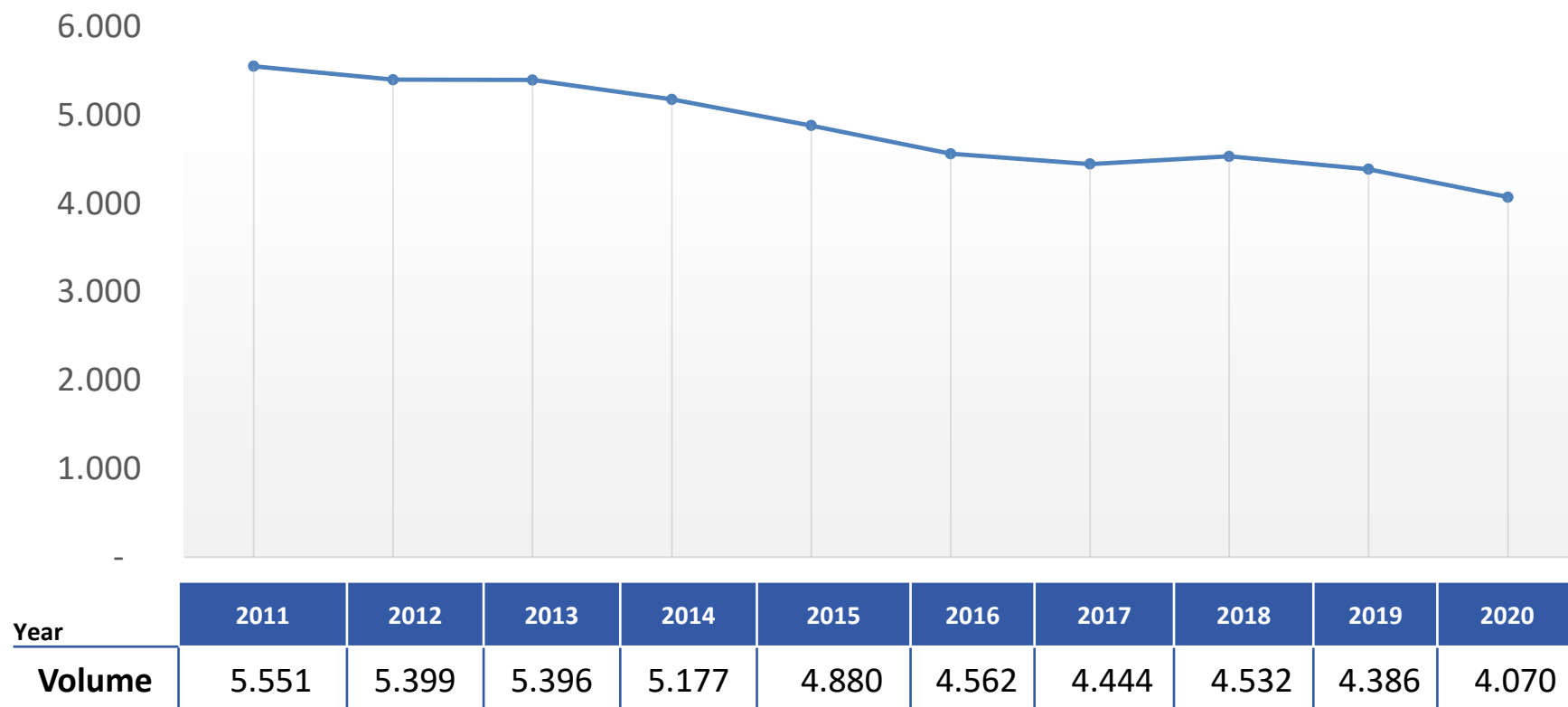
Agricultural tyres



Truck tyre Retreading market in Europe

Source: Europool / '000 units – perimeter includes Turkey

Retreaded truck tyres 2011 – 2020



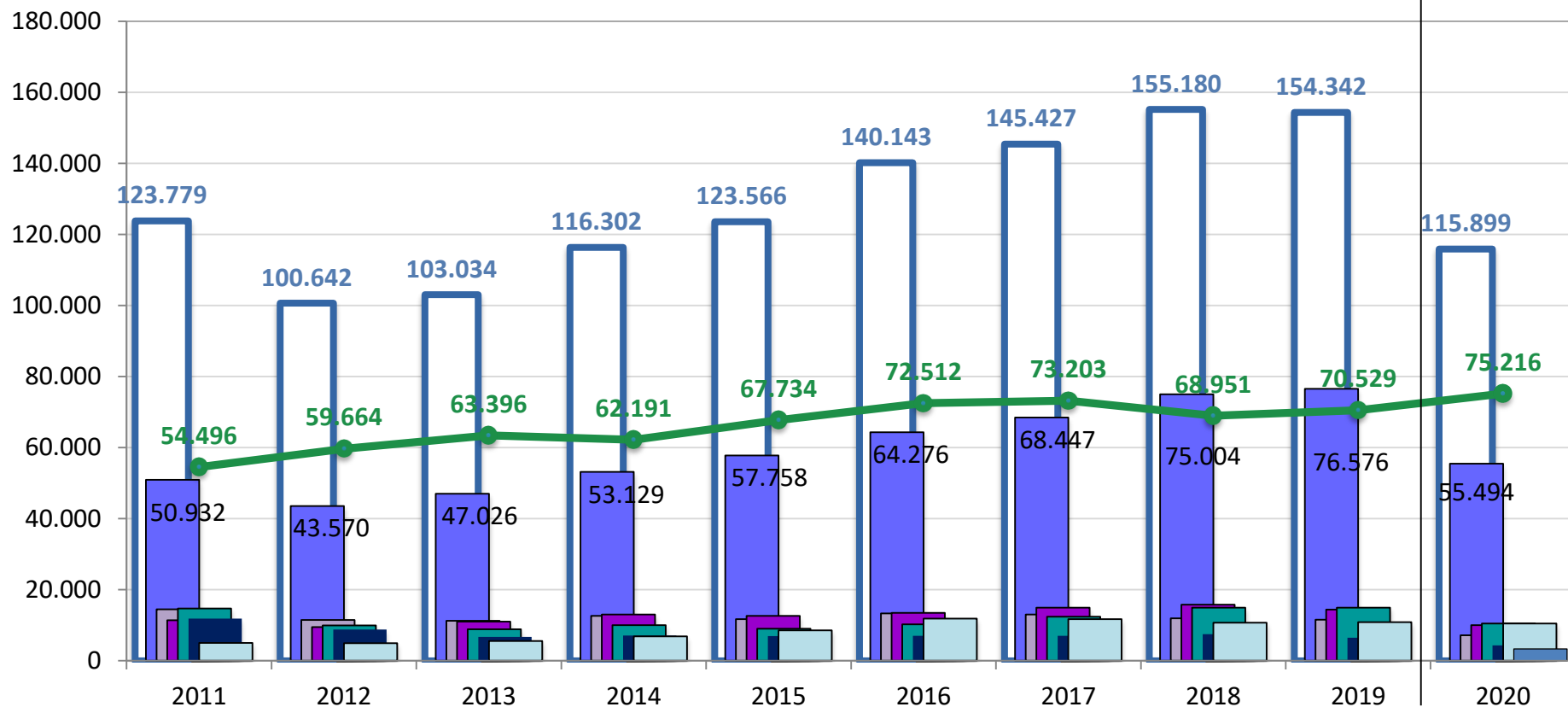
EU Imports of passenger and light commercial vehicle tyres

Source: Eurostat/ Trade in '000 units

Total EU Imports and main import origins

← EU-28 EU-27 →

▬ Total imports ▬ Chinese Imports ▬ ASEAN ▬ SOUTH KOREA ▬ TURKEY
▬ JAPAN ▬ Russia+Ukraine ▬ UK ● Total exports



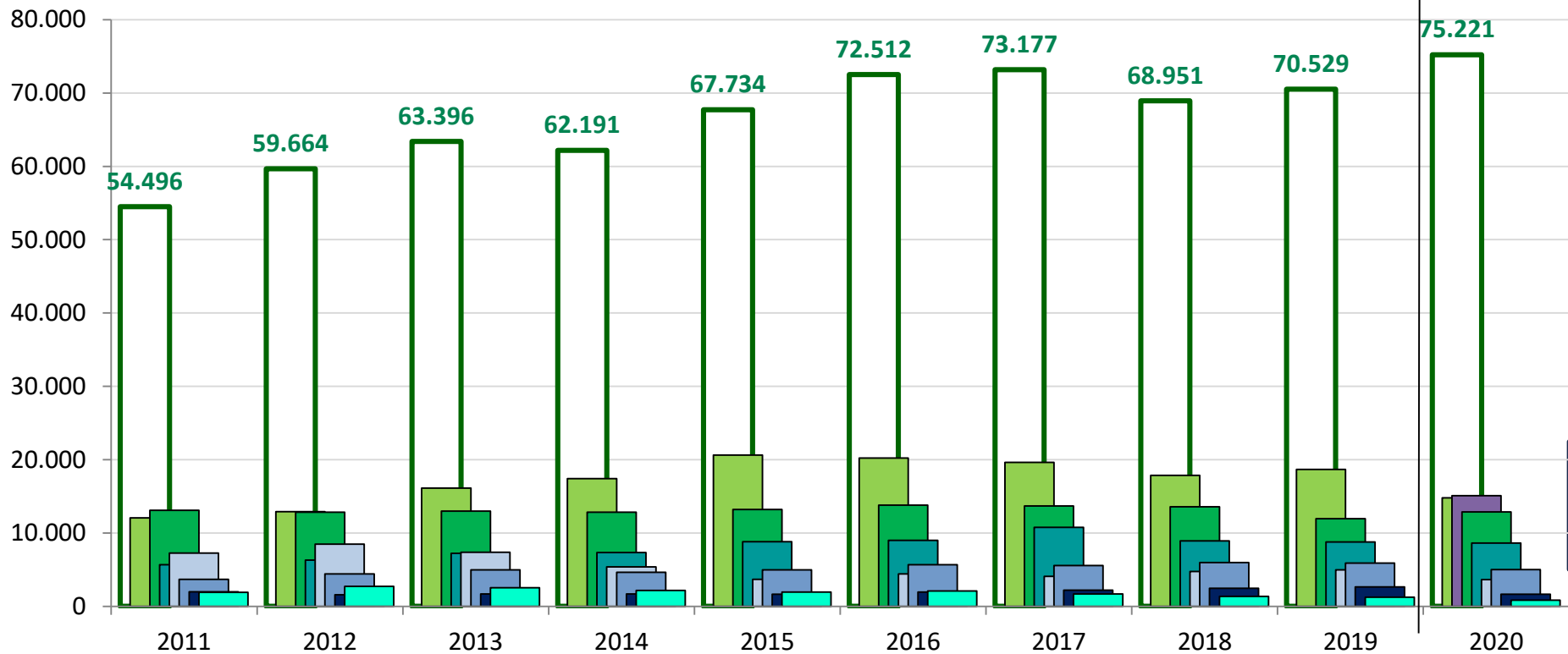
EU Exports of passenger & light commercial vehicle tyres

Source: Eurostat/ Trade in '000 units

Total Exports and main export destinations

EU-28 ← | → EU-27

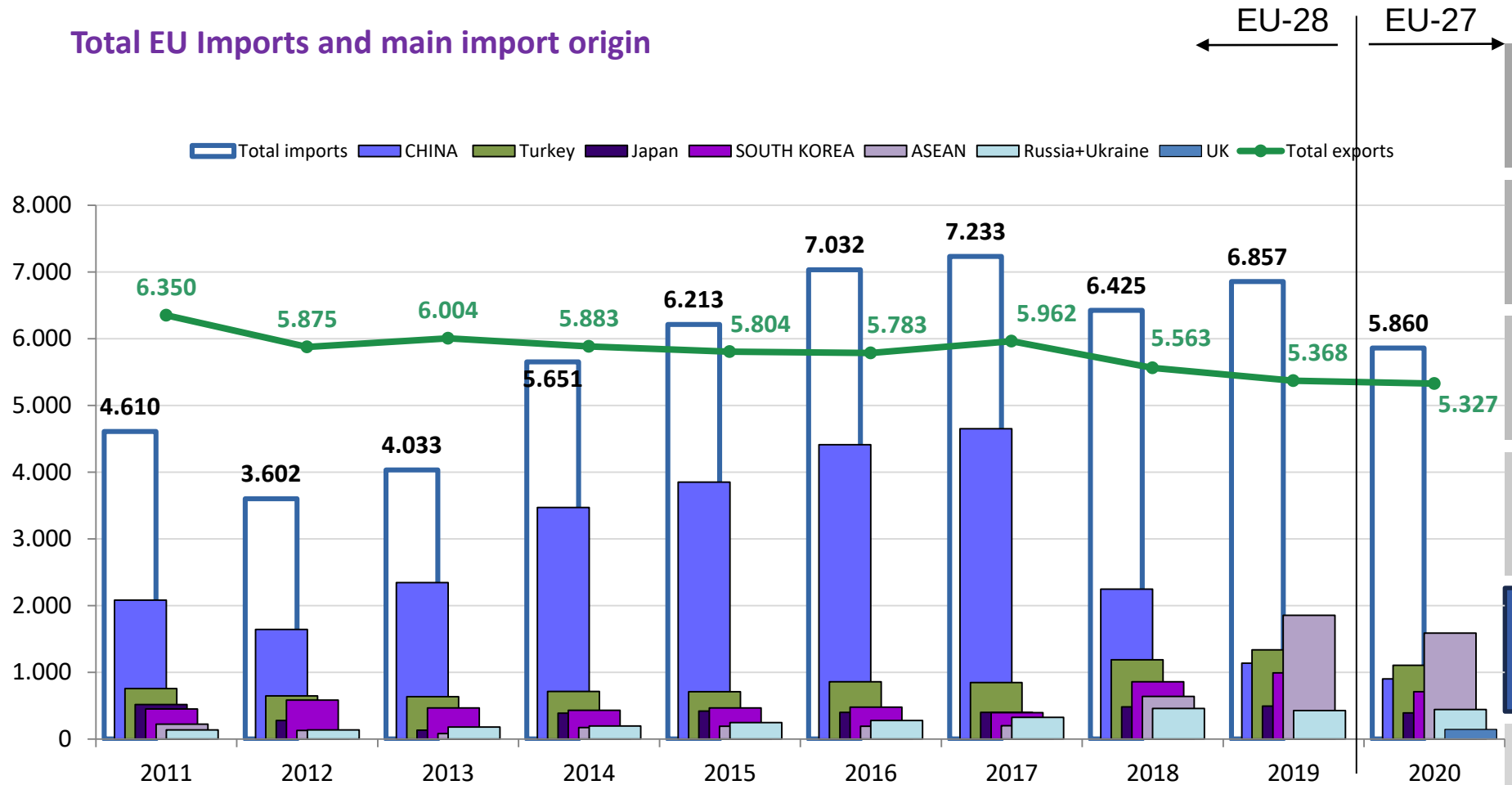
■ Total exports ■ NAFTA ■ UK ■ Non-EU Europe ■ Turkey ■ Russia+Ukraine ■ Africa ■ Middle East ■ Latin America



EU Imports of truck and bus tyres

Source: Eurostat/ Trade in '000 units

Total EU Imports and main import origin



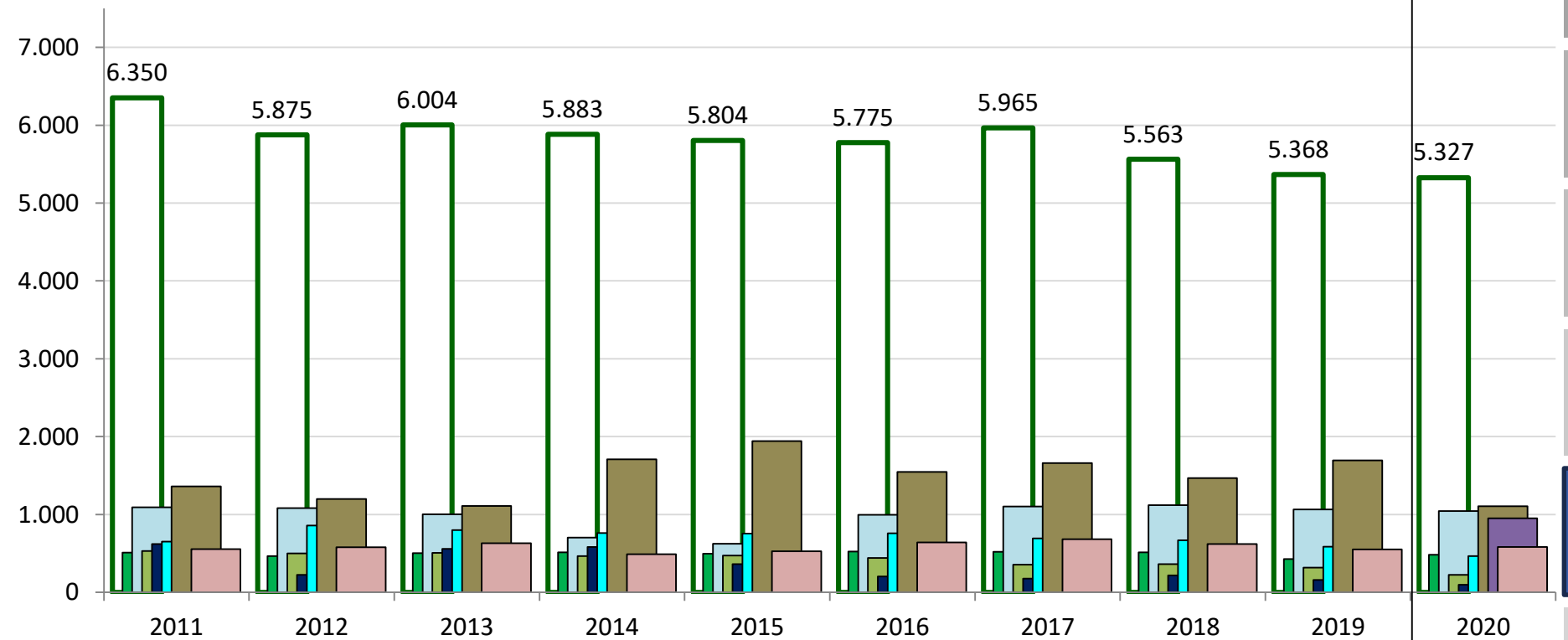
EU Exports of truck and bus tyres

Source: Eurostat/ Trade in '000 units

Total Exports and main export destinations

EU-28 ← | → EU-27

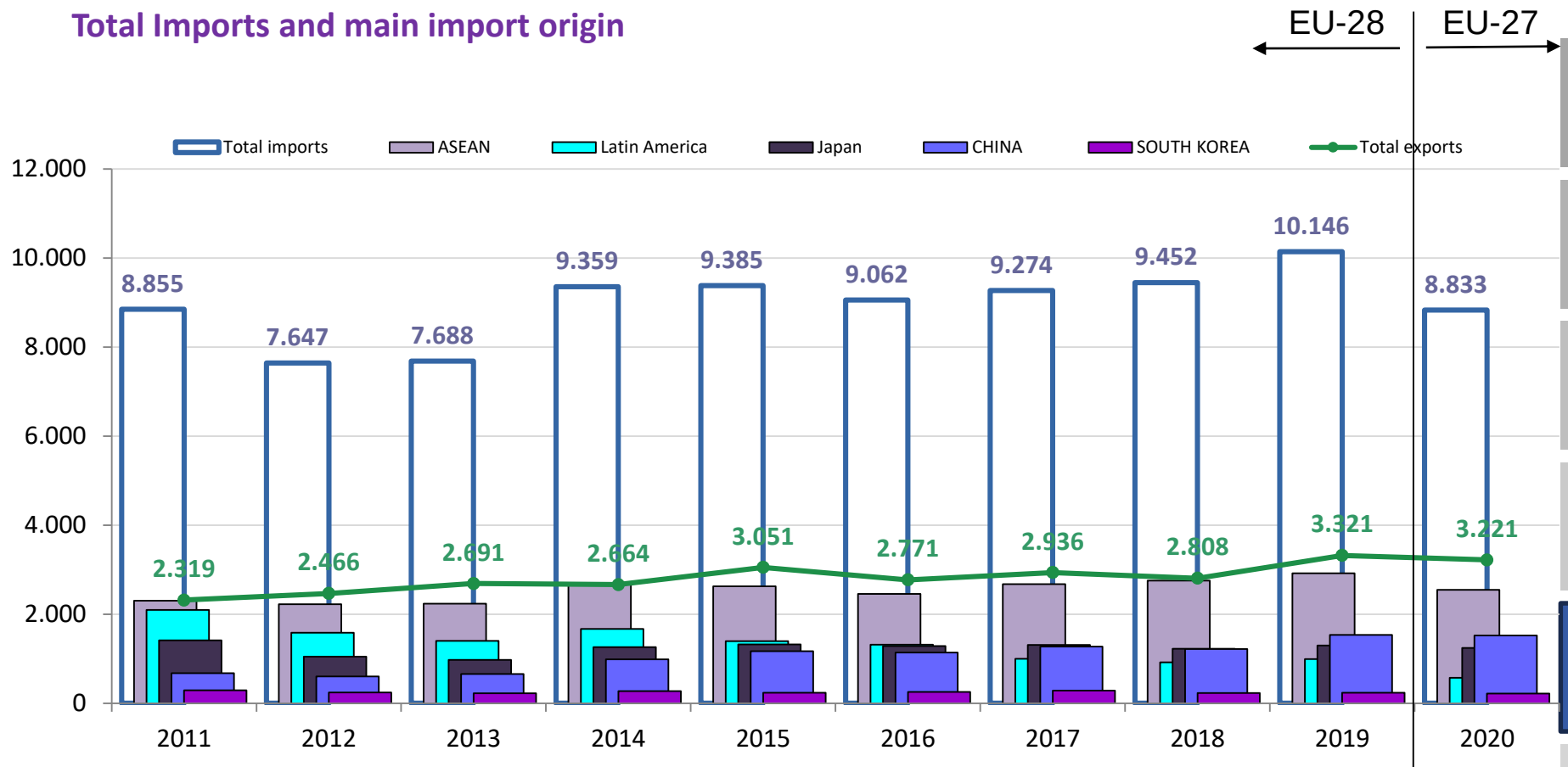
█ Total exports █ Non-EU Europe █ Russia+Ukraine █ Middle East █ Latin America █ Africa █ NAFTA █ UK █ Turkey



EU Imports 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

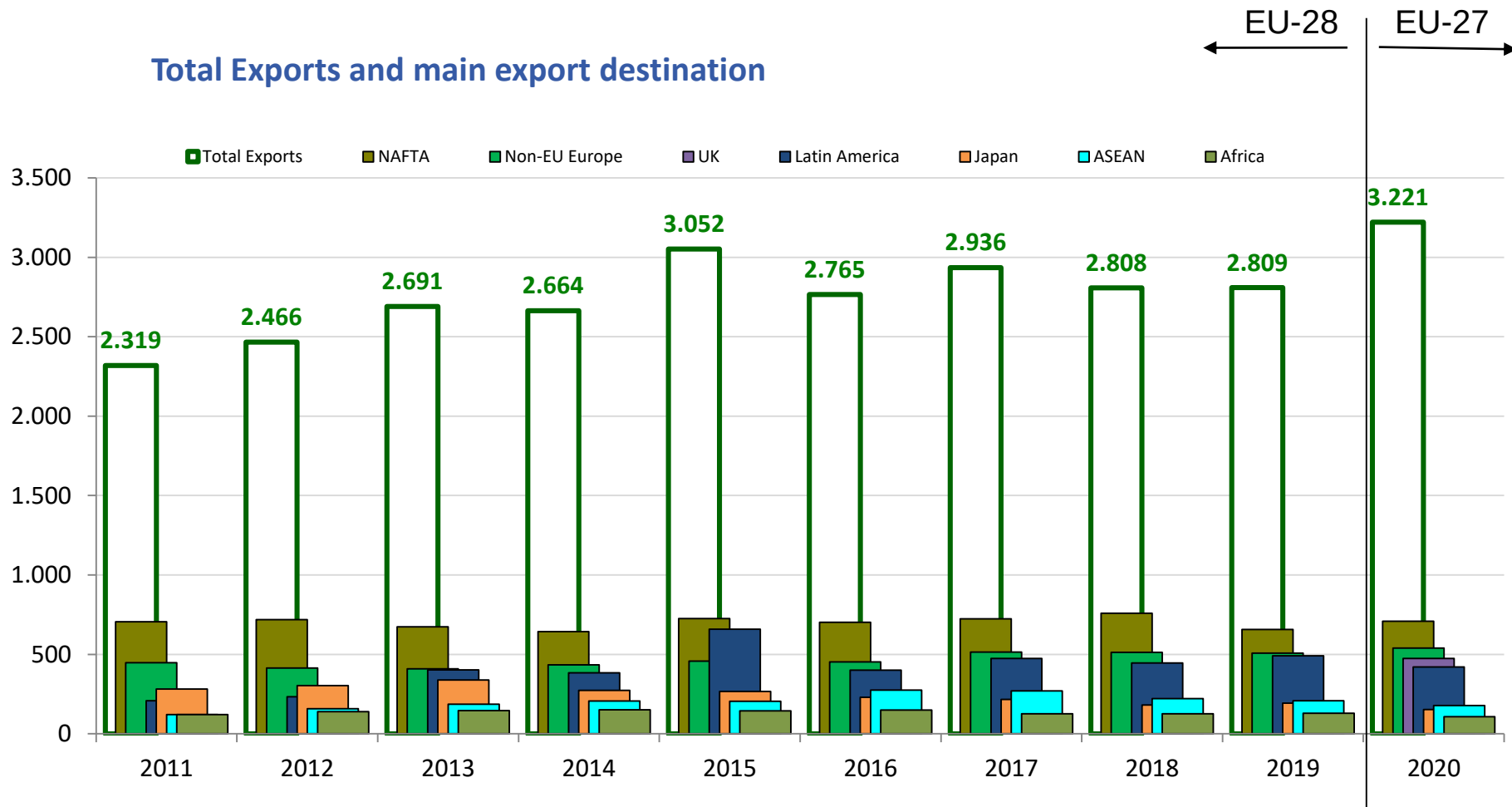
Total Imports and main import origin



EU Exports 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 Exports and main export destination



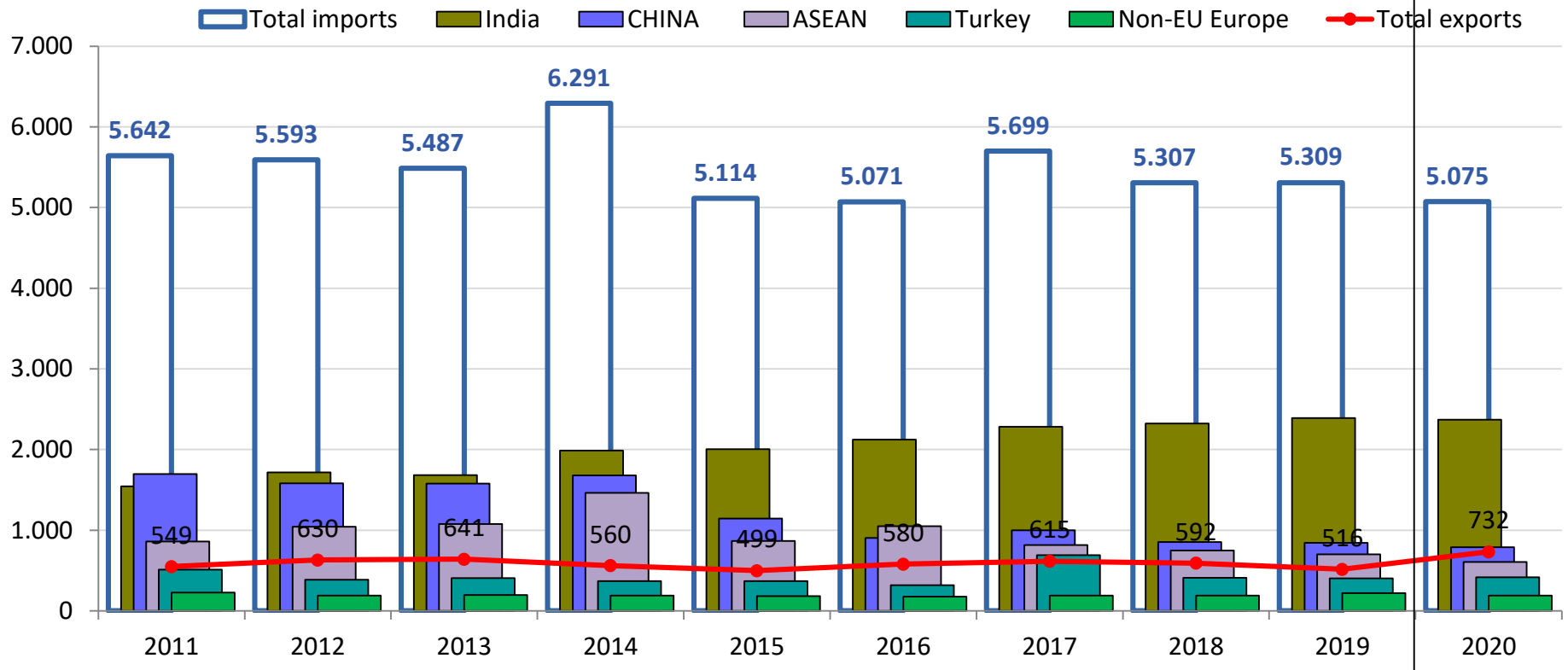
EU Imports of agricultural tyres*

Source: Eurostat/ import and exports in '000 units

*HS Code: 4011.6100 and 4011.9200

Total Imports and main import origins

EU-28 EU-27

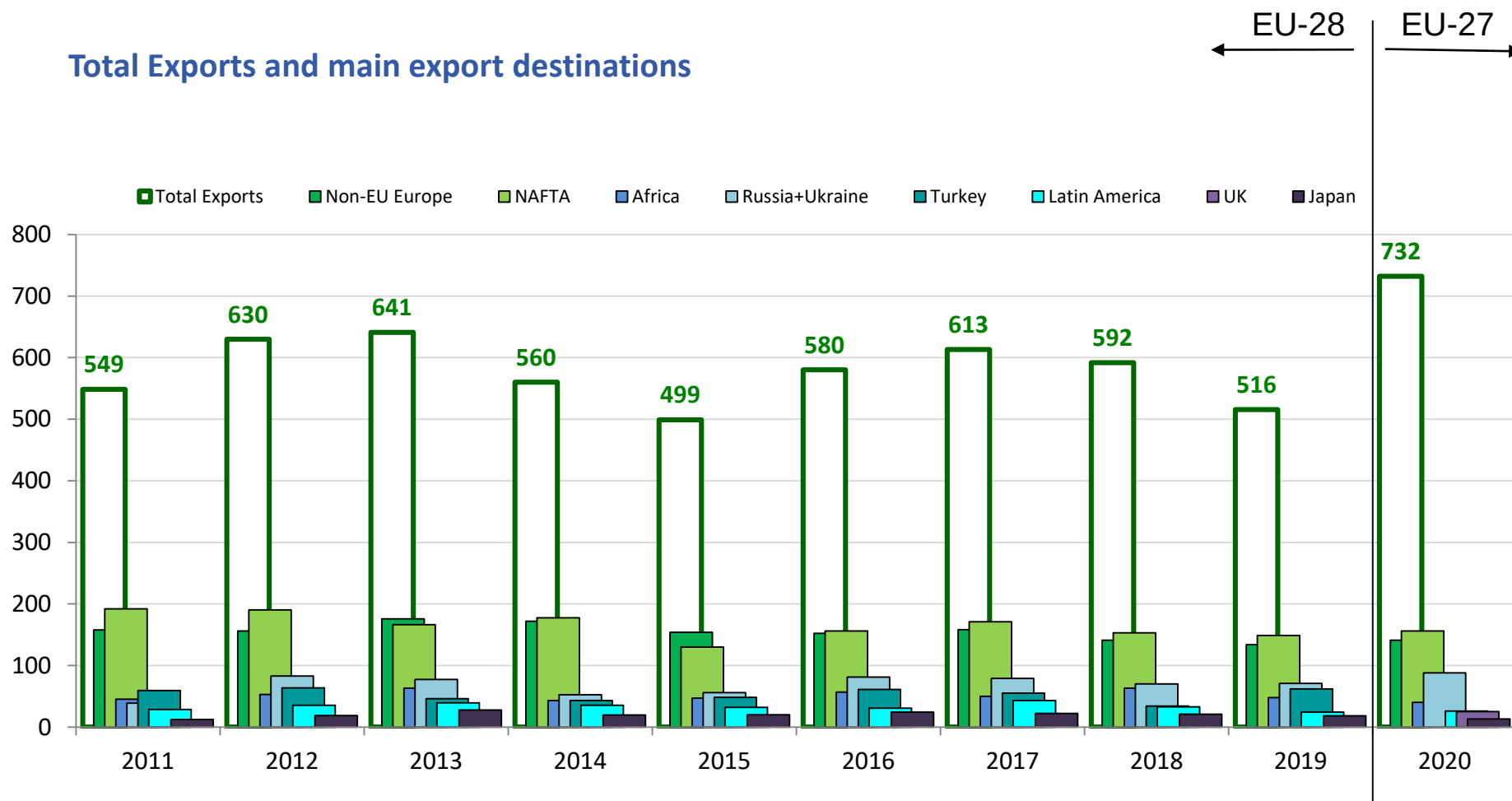


Exports of agricultural tyres*

Source: Eurostat/ import and exports in '000 units

*HS Code: 4011.6100 and 4011.9200

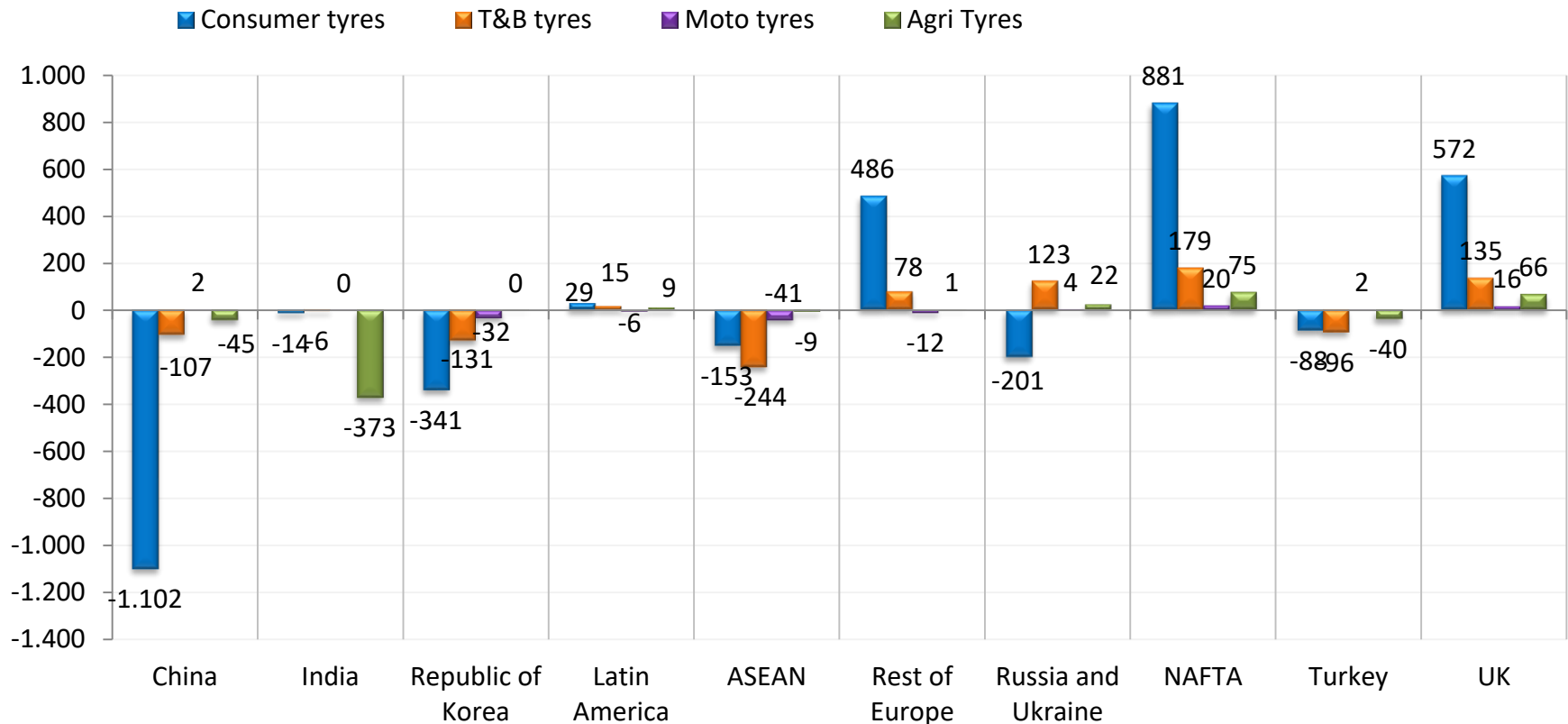
Total Exports and main export destinations



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

Trade Balance 2020/tyre type and commercial partner

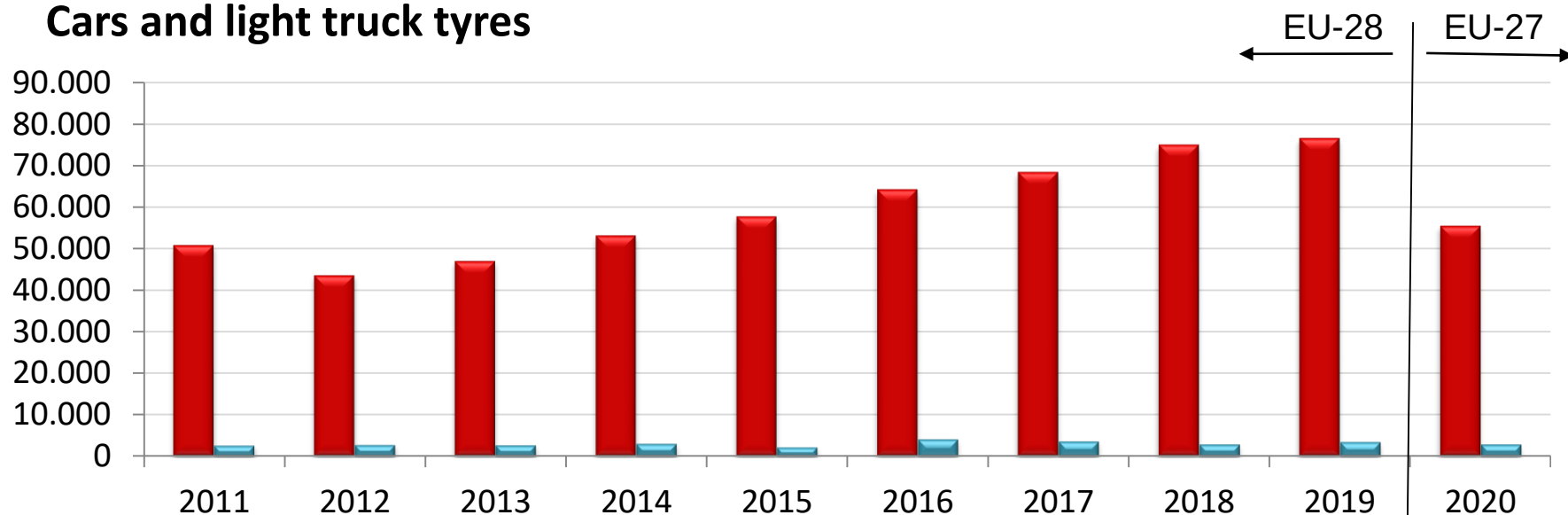


“Rest of Europe” includes the following countries: Albania, Bosnia, Switzerland, Croatia, Iceland, Moldova, Montenegro, Norway, Kosovo, Serbia, Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Liechtenstein.

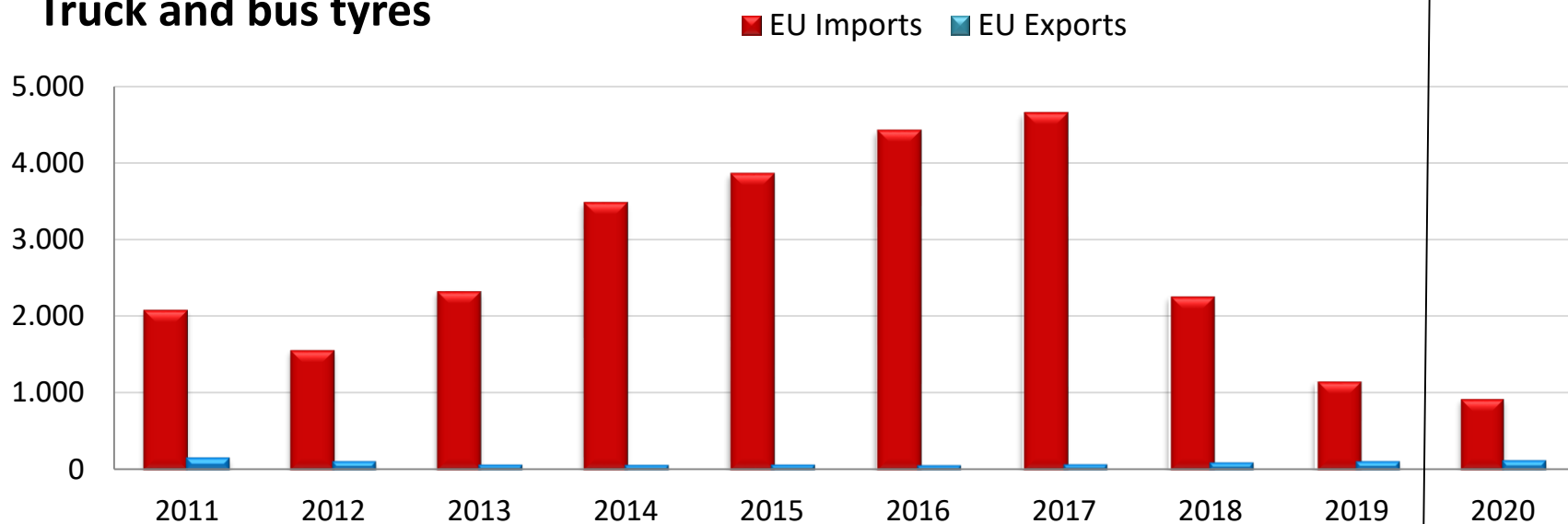
Tyre Import / export with China

Source: Eurostat/'000 units

Cars and light truck tyres



Truck and bus tyres

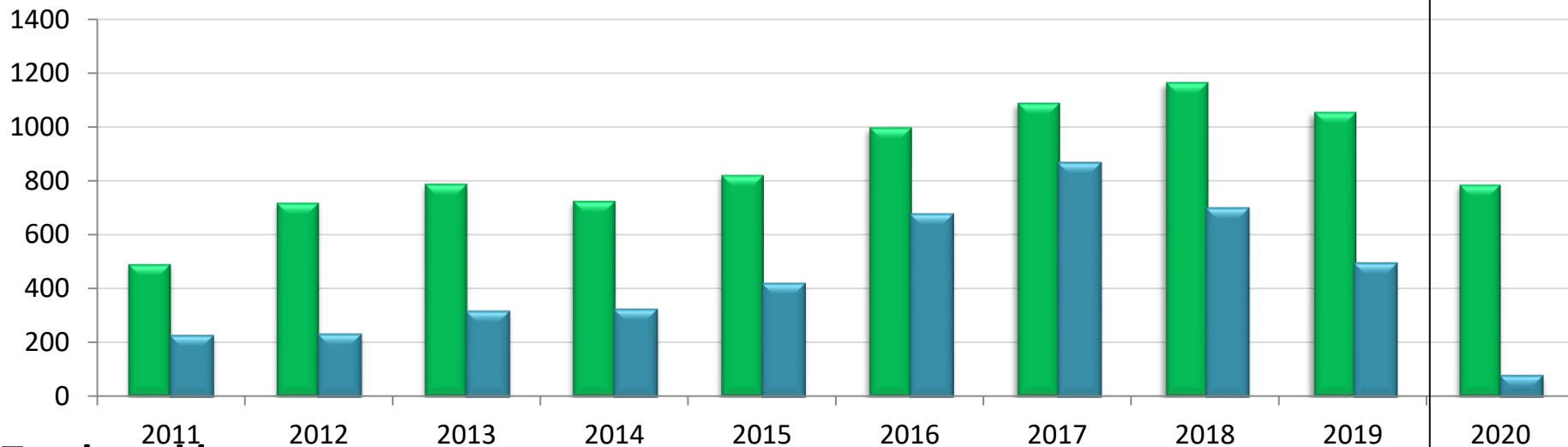


Tyre Import / export with India

Source: Eurostat/'000 units

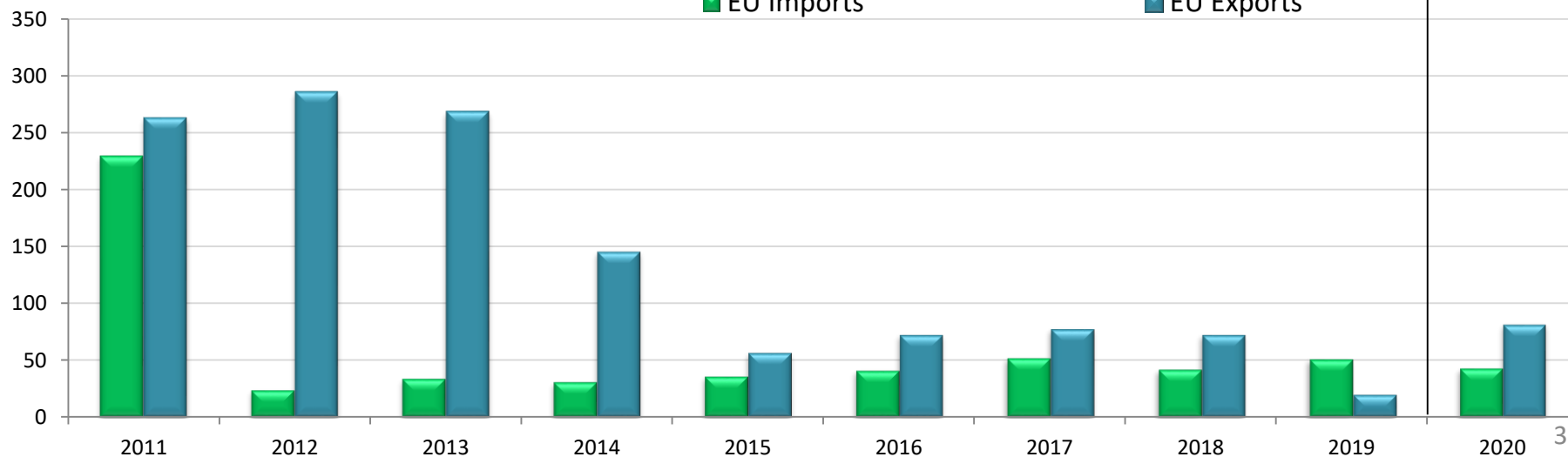
Cars and light truck tyres

EU-28 EU-27



Truck and bus tyres

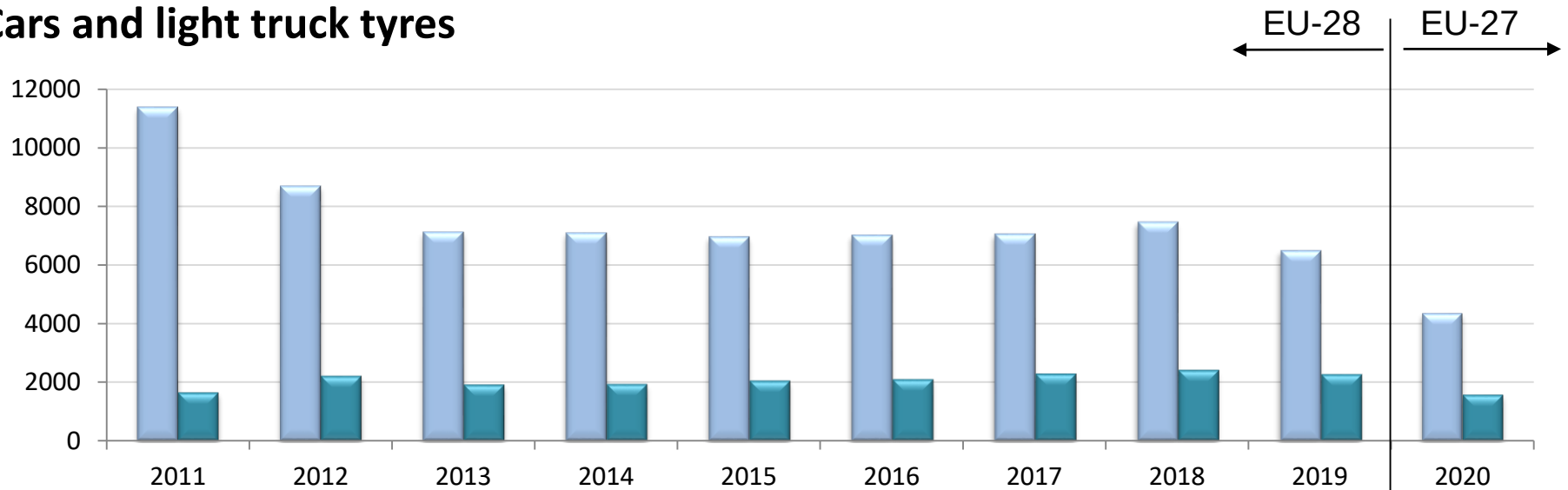
■ EU Imports ■ EU Exports



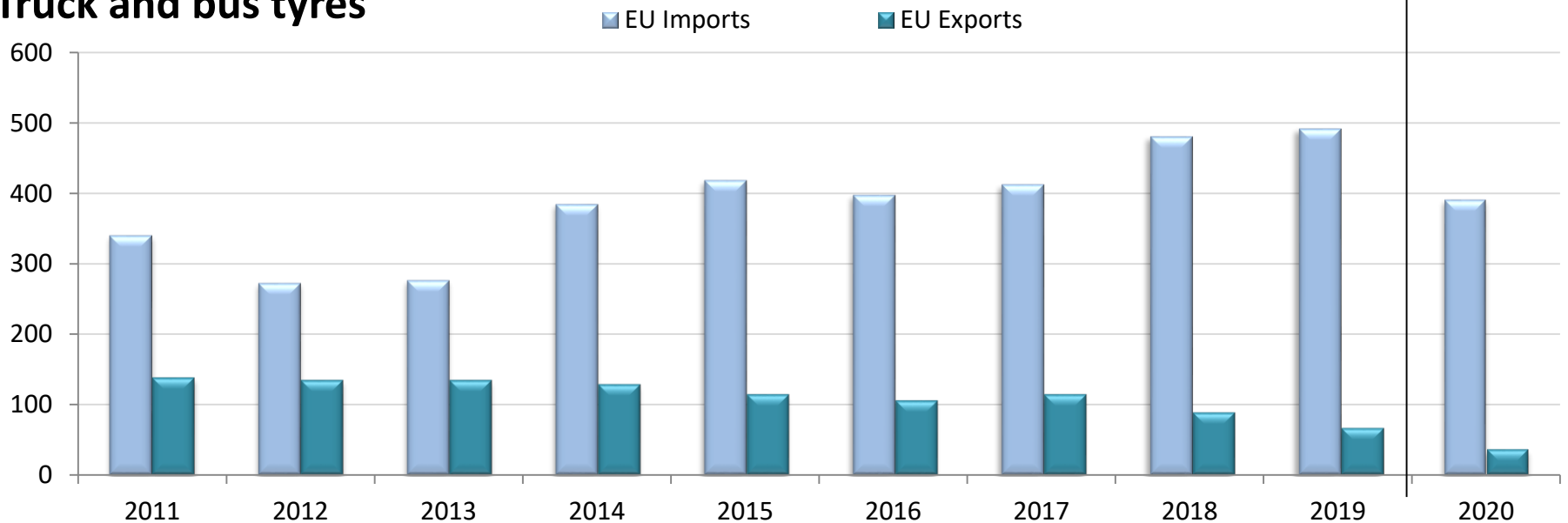
Tyre Import / export with Japan

Source: Eurostat/'000 units

Cars and light truck tyres



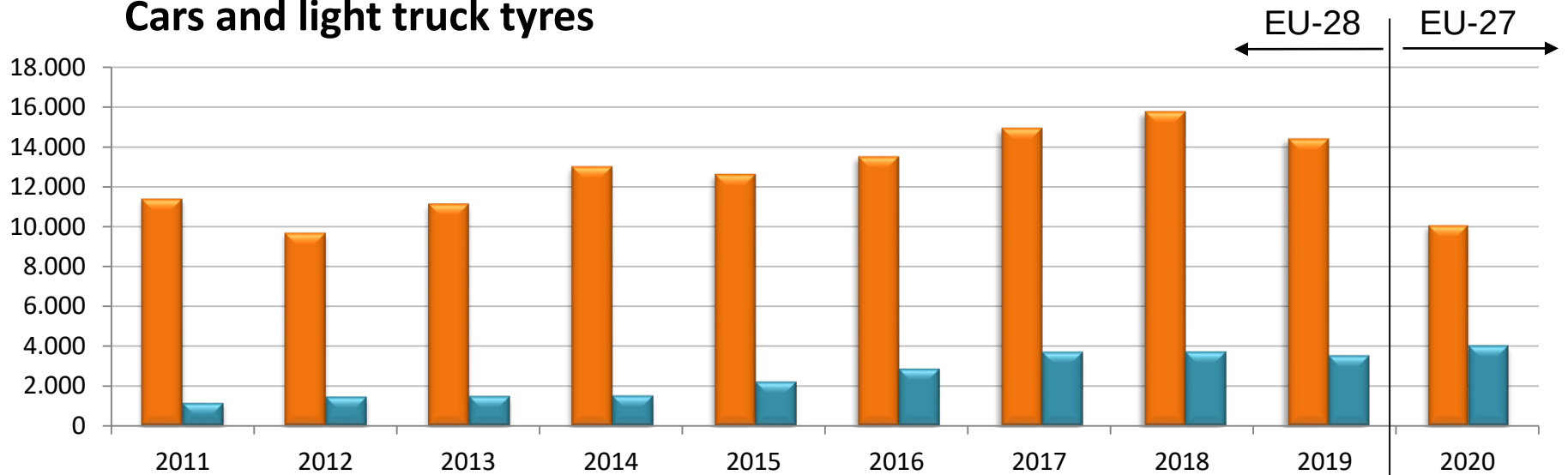
Truck and bus tyres



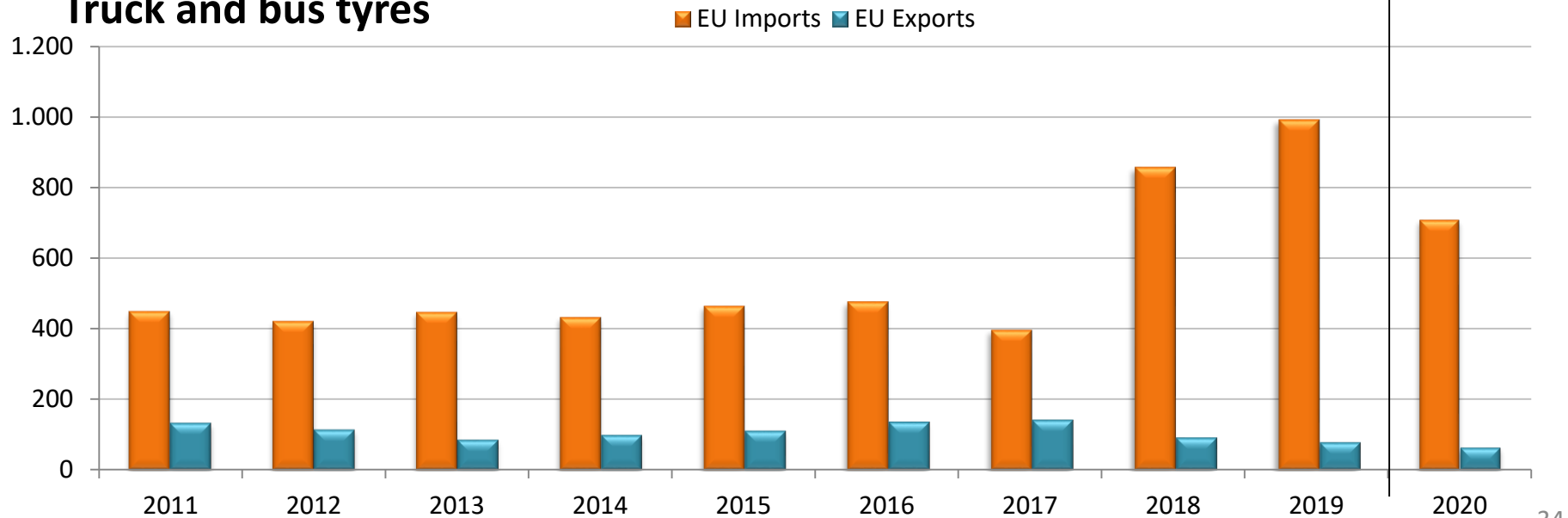
Tyre Import / export with Republic of Korea

Source: Eurostat/'000 units

Cars and light truck tyres



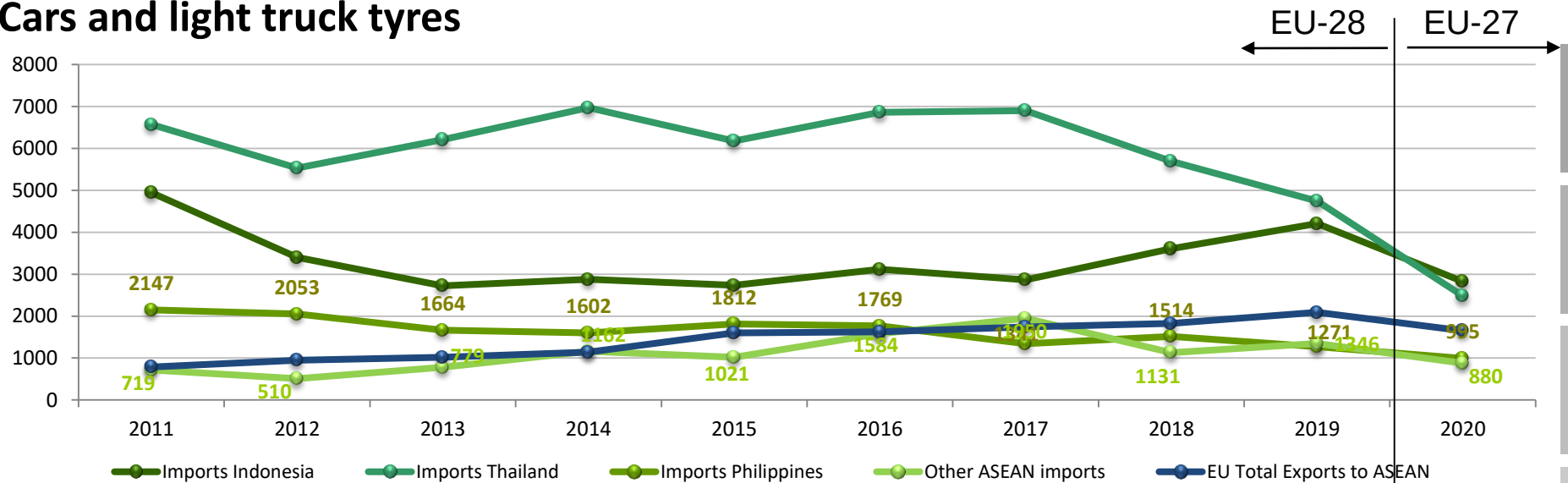
Truck and bus tyres



Tyre Import / export with ASEAN

Source: Eurostat/'000 units – EU28

Cars and light truck tyres



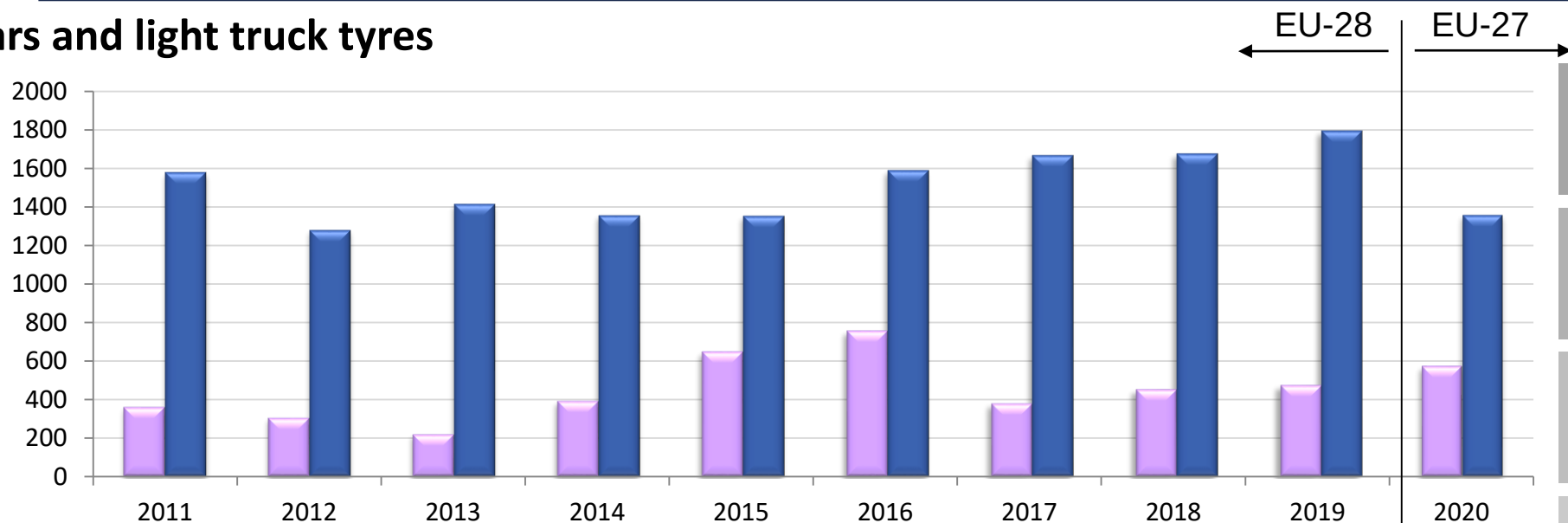
Truck and bus tyres



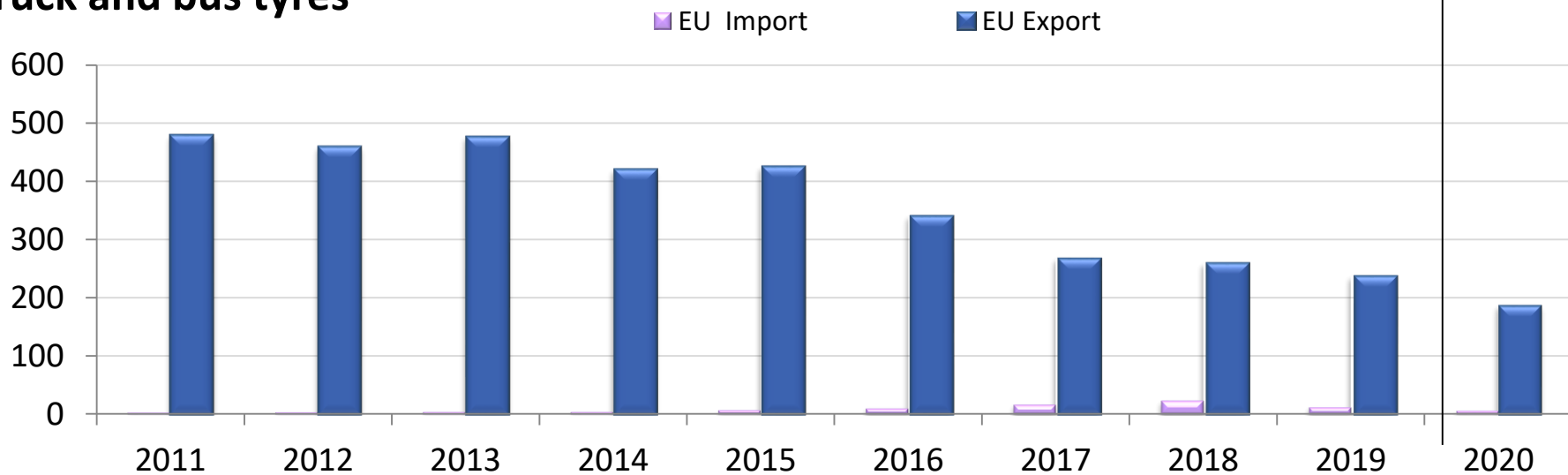
Tyre Import / export with GCC

Source: Eurostat/'000 units

Cars and light truck tyres



Truck and bus tyres

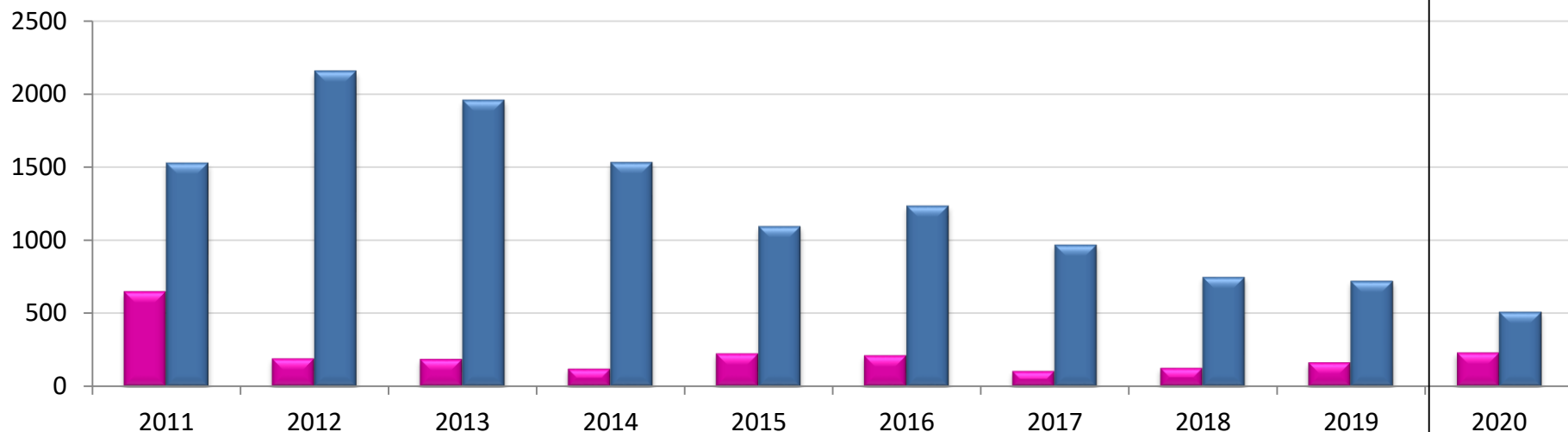


Tyre Import / export with Mercosur

Source: Eurostat/'000 units

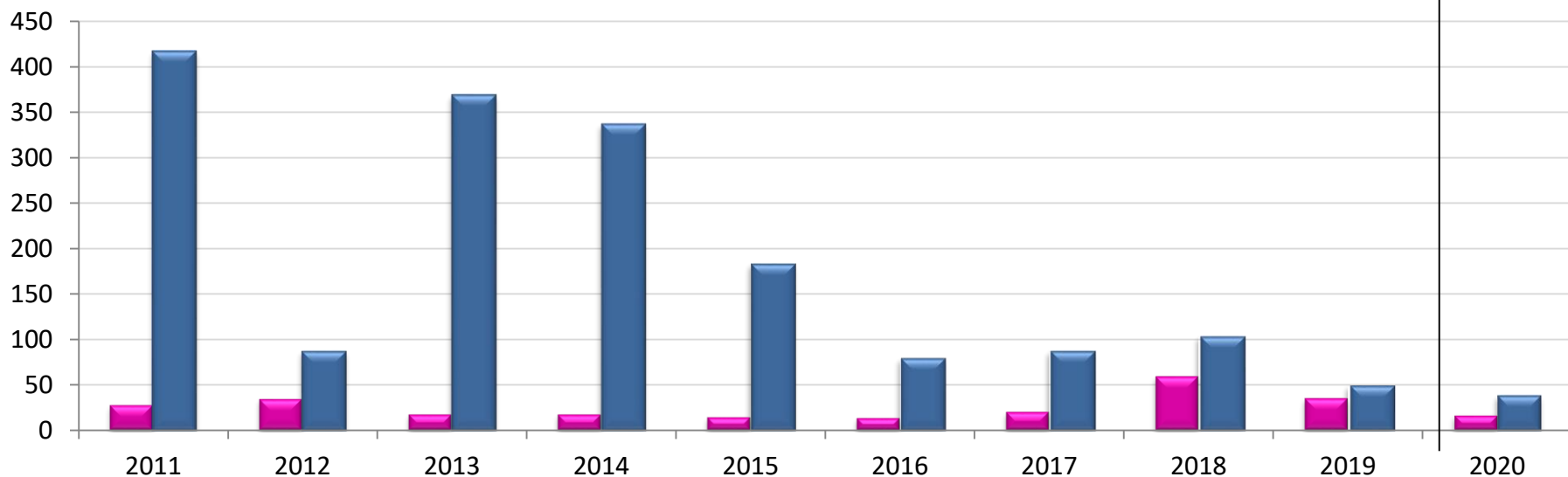
Cars and light truck tyres

EU-28 ← | → EU-27



Truck and bus tyres

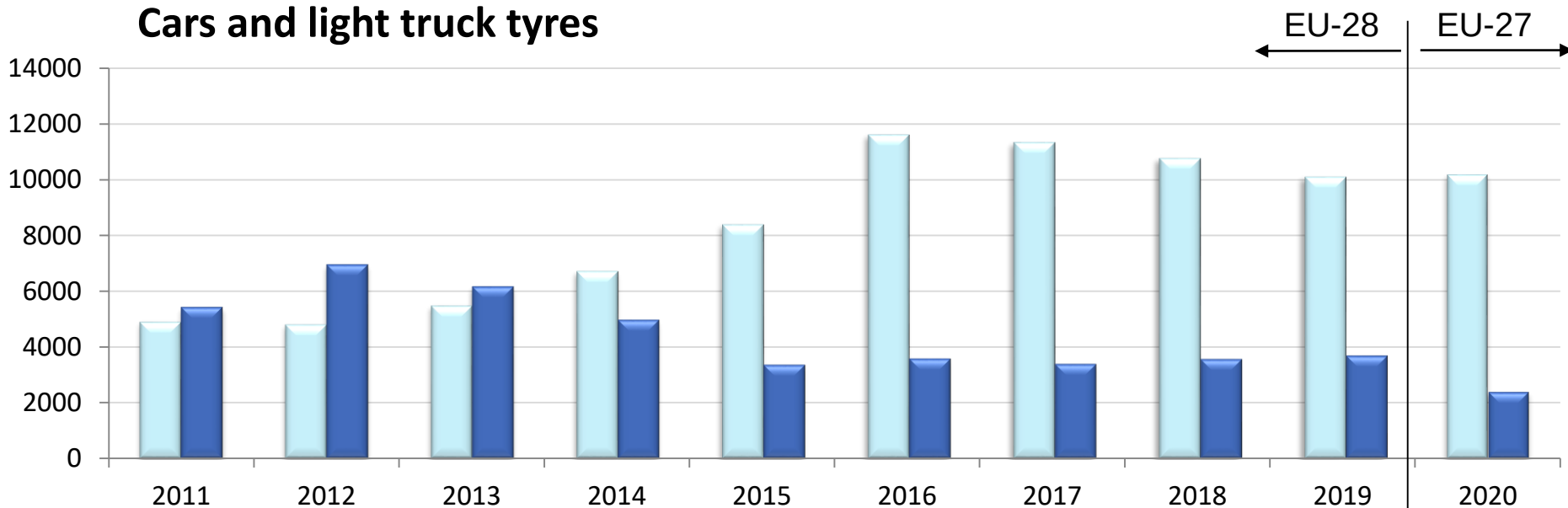
■ EU Import ■ EU Export



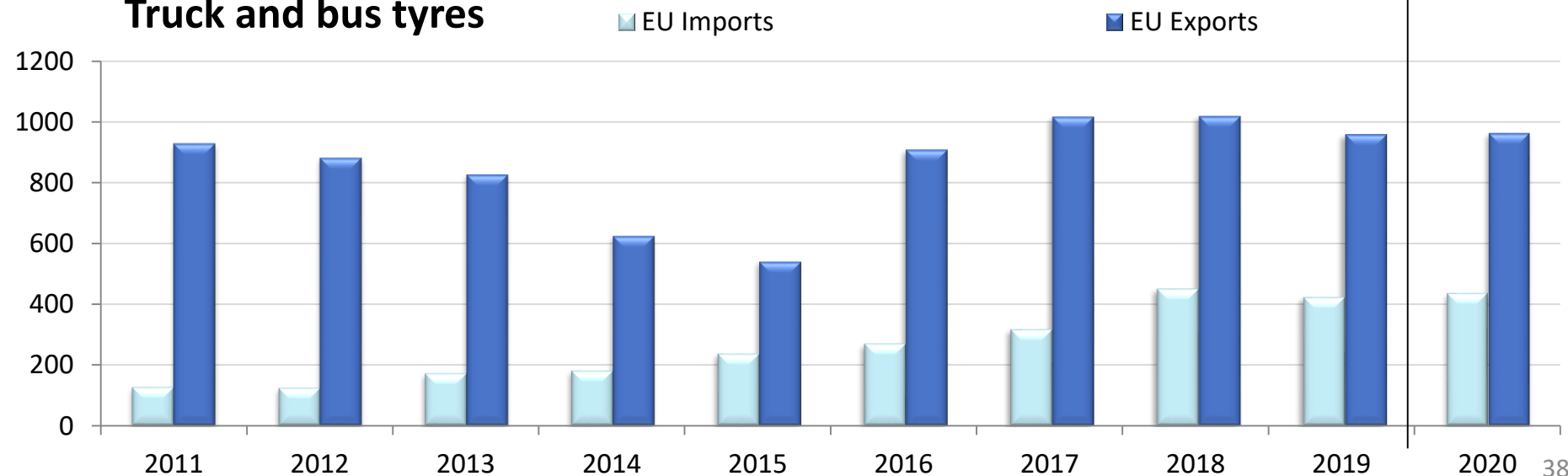
Tyre Import / export with Russia

Source: Eurostat/'000 units

Cars and light truck tyres



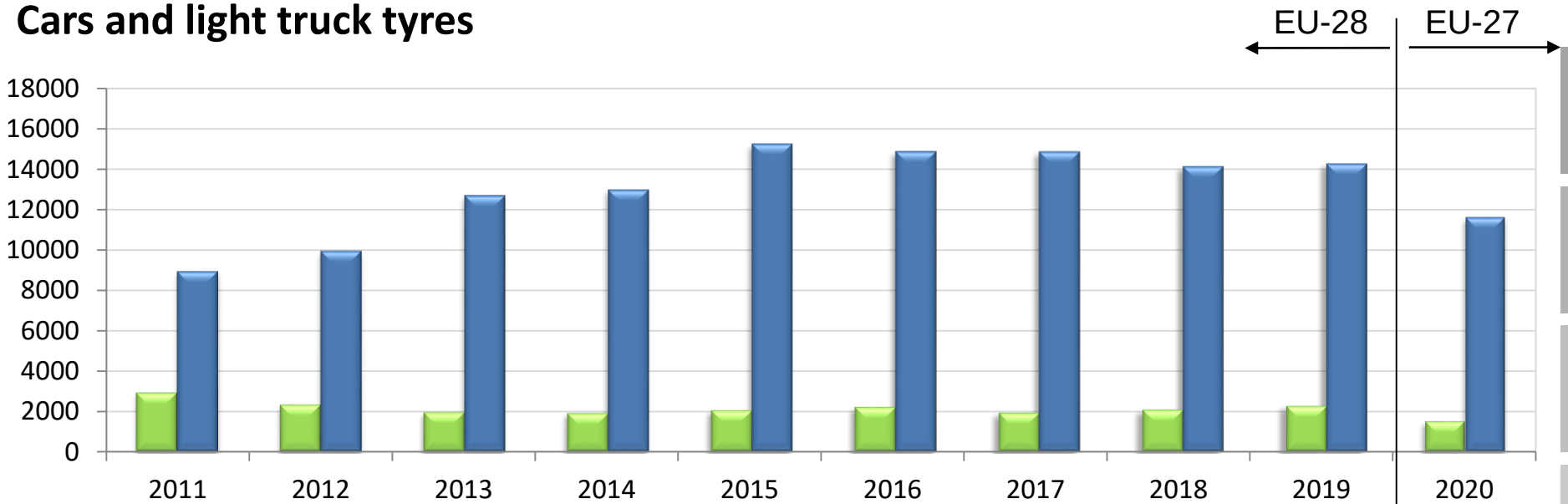
Truck and bus tyres



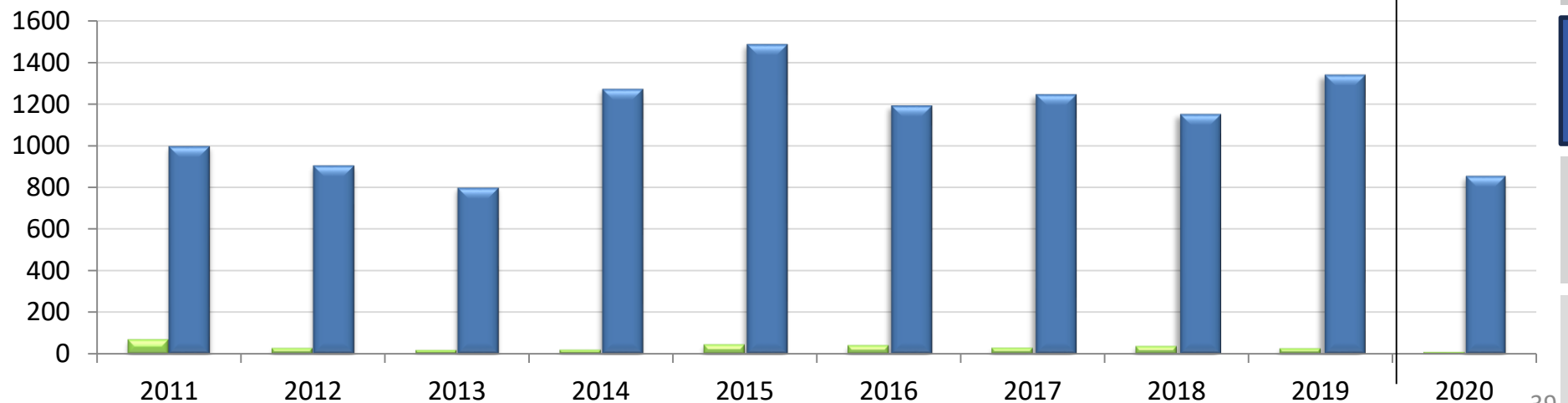
Tyre Import / export with US

Source: Eurostat/'000 units

Cars and light truck tyres



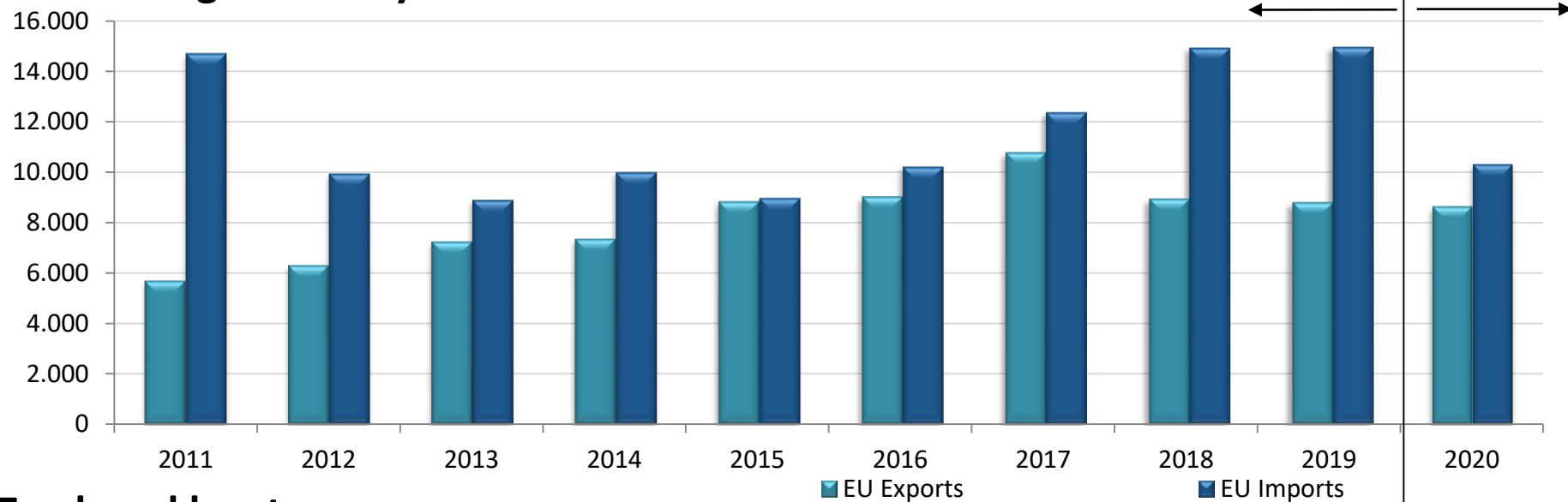
Truck and bus tyres



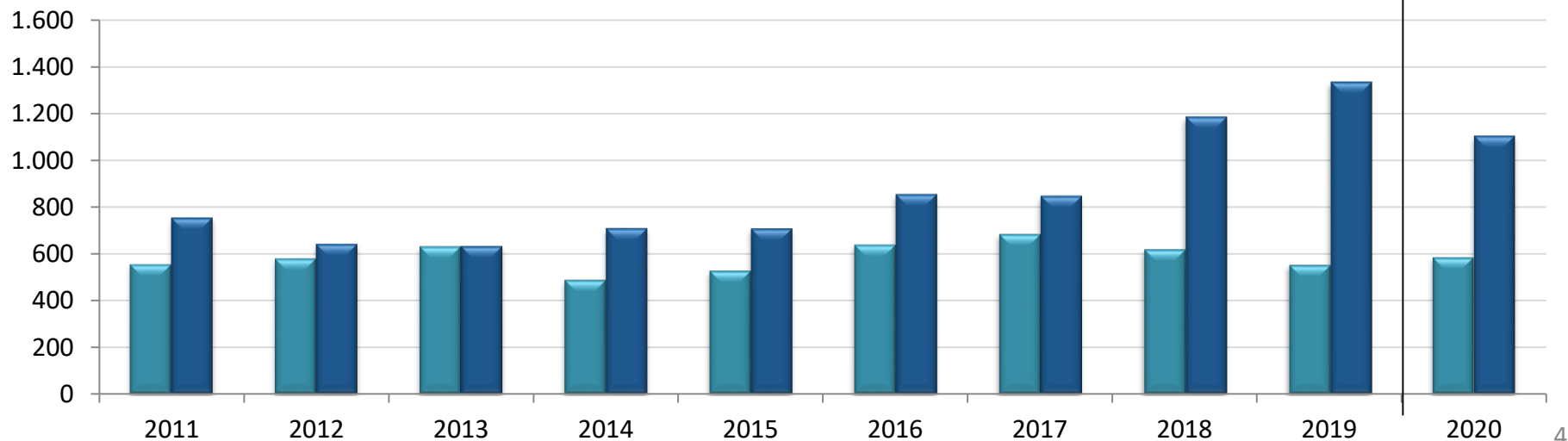
Tyre Import / export with Turkey

Source: Eurostat/'000 units

Cars and light truck tyres



Truck and bus tyres



RUBBER

ETRMA

2019/2020 Key Figures

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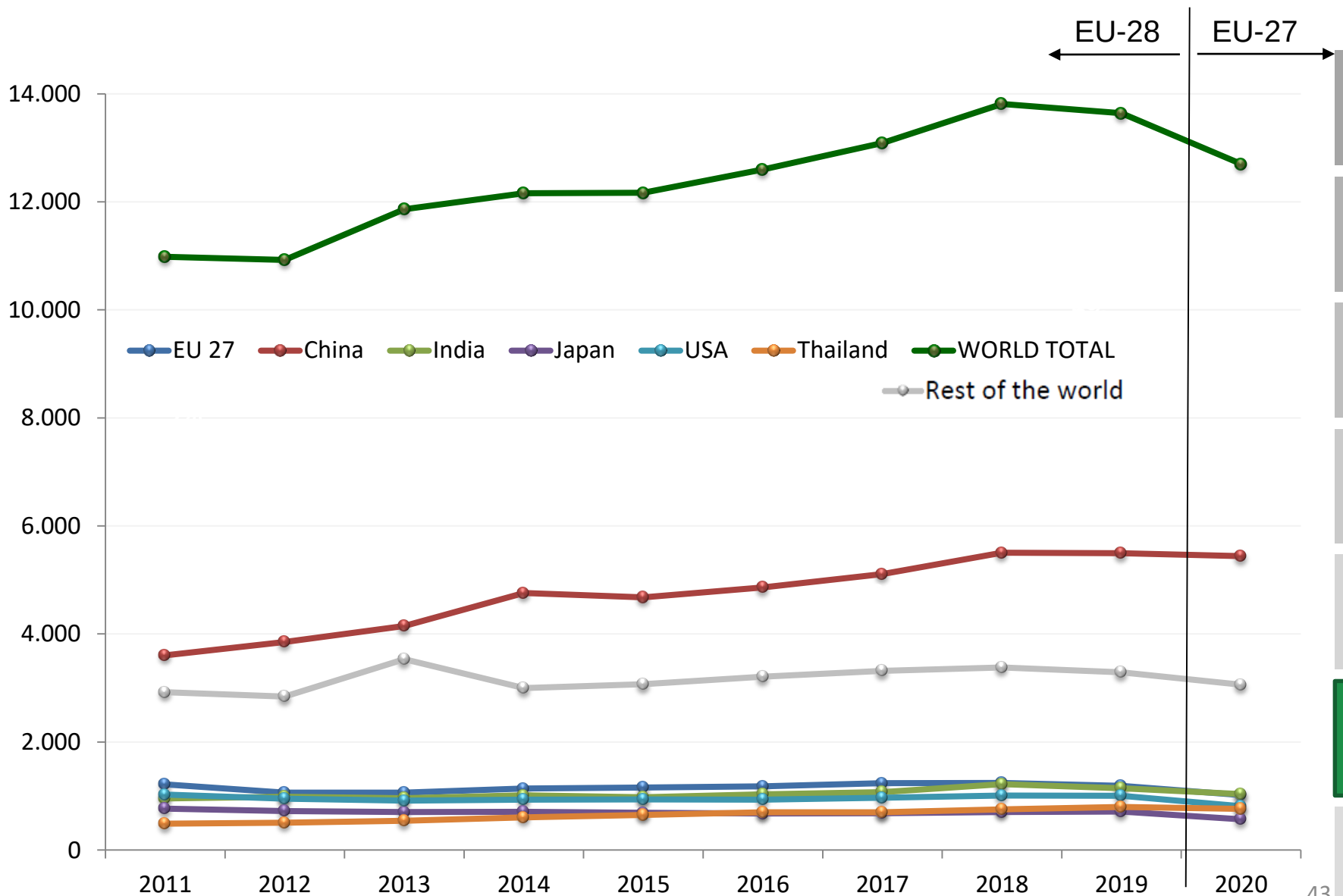
EU Total and breakdown of consumption of rubber

Source: IRSG /'000 tonnes



Natural rubber consumption in key countries

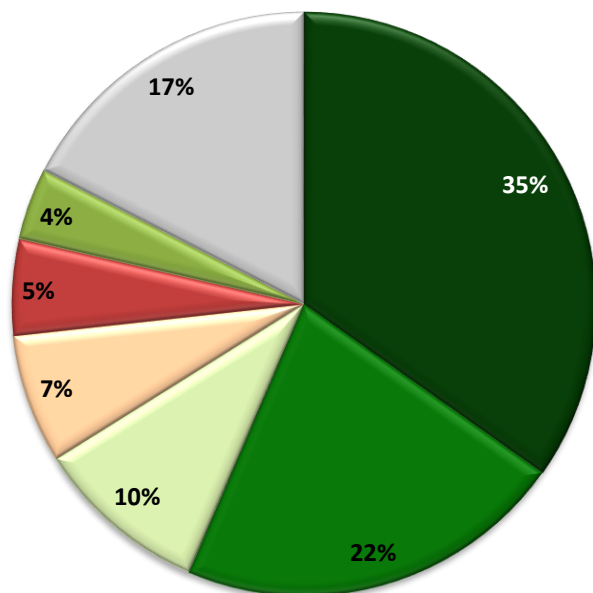
Source: IRSG/'000 tonnes



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

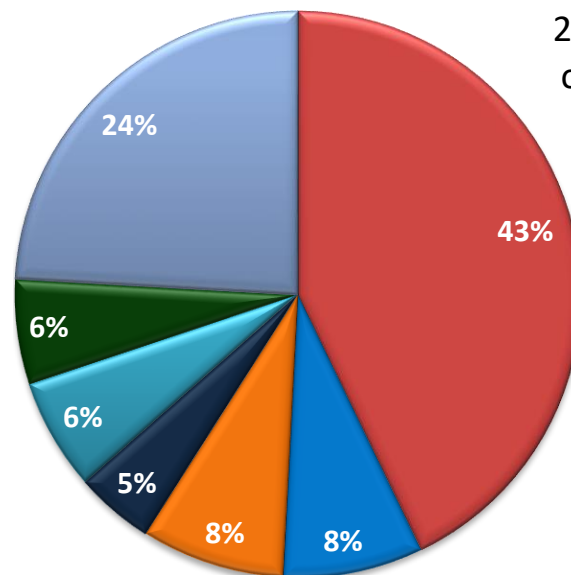
Source: IRSG/'000 tonnes

2020 Production Natural Rubber



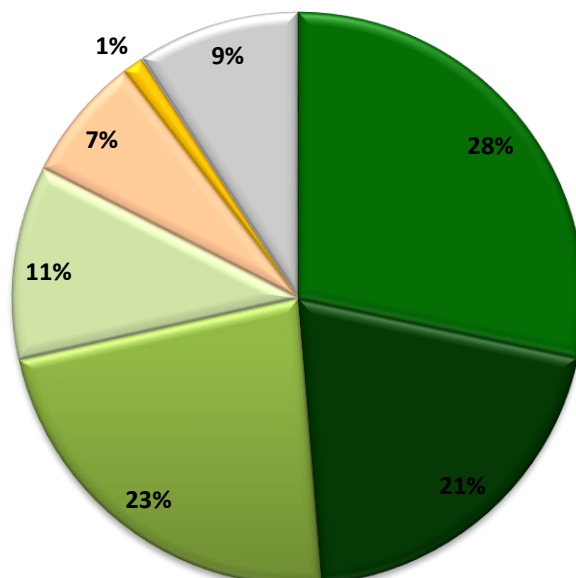
- Thailand
- Indonesia
- Vietnam
- Cote d'Ivoire
- China
- Malaysia
- Rest of the world

2020 Consumption of Natural Rubber



- China
- EU 27
- India
- Japan
- USA
- Thailand
- Rest of the world

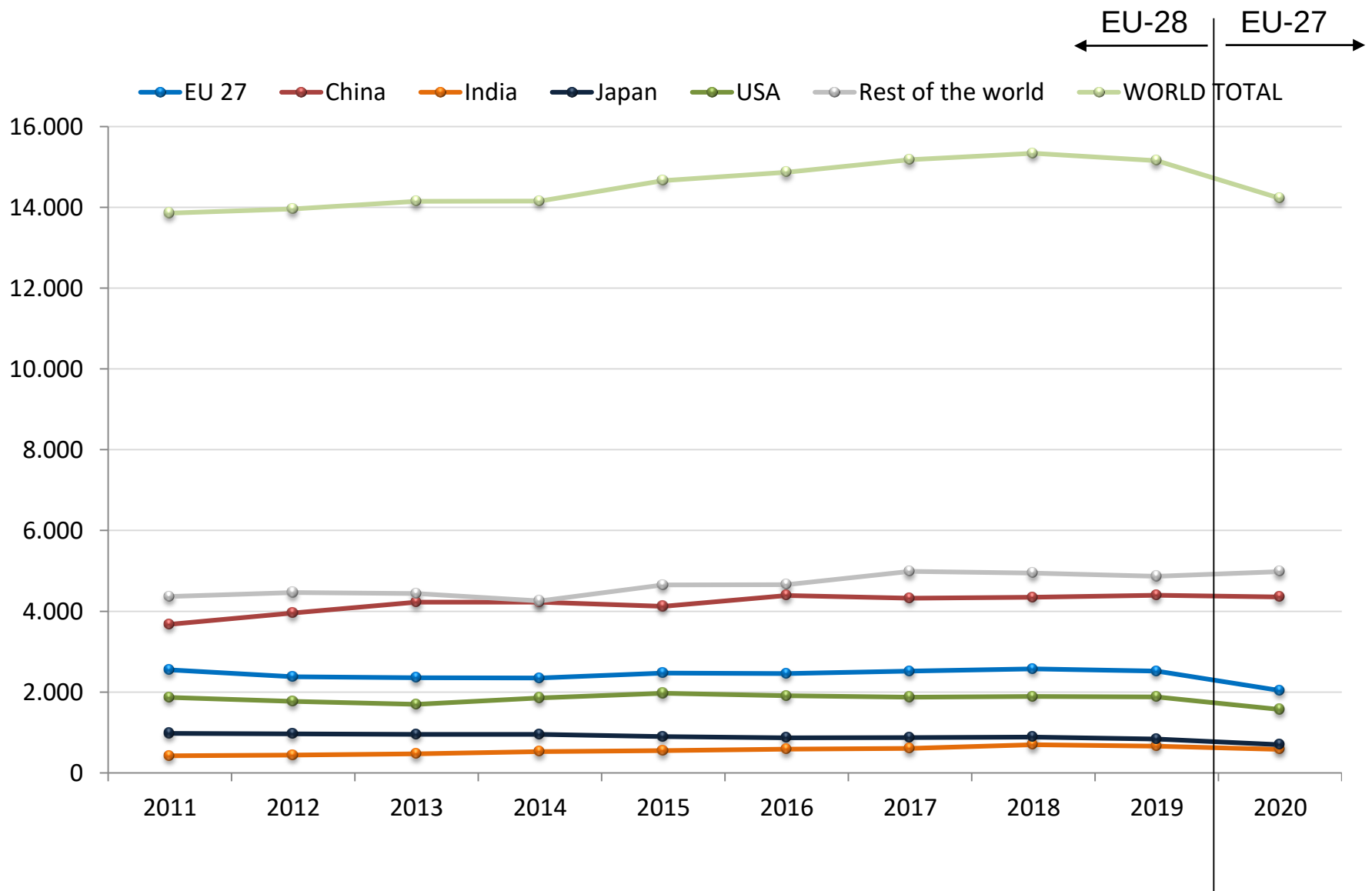
2020 Imports of Natural Rubber



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

Synthetic rubber consumption in key countries

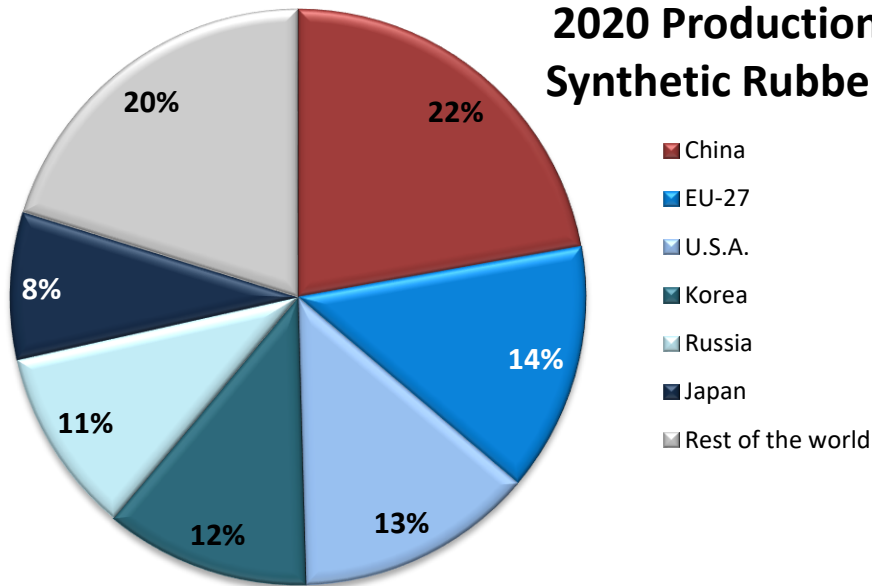
Source: IRSG/'000 tonnes



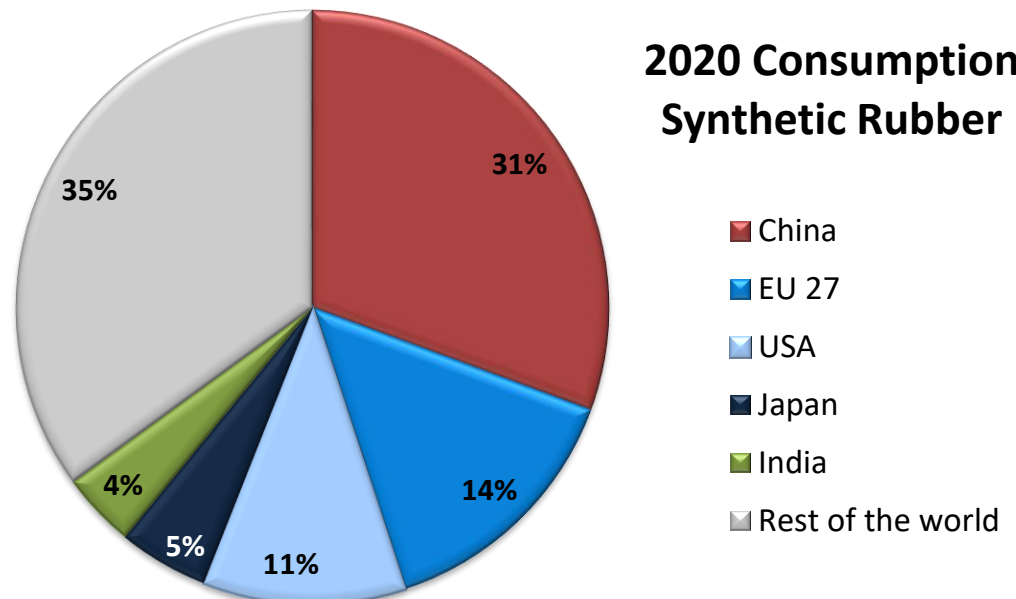
Synthetic rubber production / consumption in key countries

Source: IRSG/'000 tonnes

2020 Production Synthetic Rubber



2020 Consumption Synthetic Rubber



Appendix: Export and Import Tariffs

ETRMA

2019/2020 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

Export and import tariffs for tyres

Source: [Access2markets](#)

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%	0%	10-15%	15%	0%	0%	40%	5%	0%	10%	0%	10%	0%	16%	3,4-4% ¹	18,7%
4011.20	MHV Tyres	16-35%	16%	0%	10%	0%	10-15%	15%	0%	0%	40%	10%	0%	10%	0%	10%	0%	16%	3,4-4% ¹	20,4-8,1%
4011.40	Moto Tyres	35%	16%	0%	15%	0%	10%	15%	0%	0%	30%	16%	0%	5%	0%	10%	0%	16%	0%	26,2%
4011.70/90	Agro Tyres	16%	2-16%	0%	17-25%	0%	10%	15%	0%	0%	5-30%	2-16%	0%	5%	0%	10%	0%	2-16%	0-4%	15-16,3%

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	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%	4,5%	0%	4,5%	0%	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%	4,5%	0%	4,5%	0%	4,5%	0%	4,5%	4,5%	0%
4011.40	Moto Tyres	4,5%	4,5%	0%	4,5%	0%	0%	0%	1,1%	0%	4,5%	4,5%	0%	4,5%	0%	4,5%	0%	4,5%	4,5%	0%
4011.61 /92	Agro Tyres	4%	4%	0%	4%	0%	0%	0%	0-4%	0%	4%	4%	0%	4%	0%	4%	0%	4%	4%	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%)

Export and import tariffs for GRG

Source: [Access2markets](#)

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%	8%	0-2,7%	10%	5%	0%	0%	5-30%	11-14%	0%	5%	0%	5-30%	0%	14%	0-3,3%	0%
4009	Tubes , pipes hoses	14%	14%	0%	10%	0-2,7%	10%	5%	0%	0%	30%	10%	0%	3%	0%	3-10%	0%	14%	2,5%	0-1,5%
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 to 8%	0 to 15%
4015	Apparel+clothing accessories	0*-16%	0*-16%	0%	8-10%	0 to 3,6%	10%	10%	0%	0%	0-15%	0*-16%	0-1,6%	0*-10%	0%	0*-10%	0%	0-16%	0-4%	2,5-13,3%

¹ Of Free-on-Board (FOB) value

* Specific goods of this subheading are duty free and exempted from the statistical fee due to the COVID-19 crisis

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	Peru	Russia	Singapore	Thailand	Ukraine ¹	Uruguay	USA	Vietnam ¹
4008	Plates, sheets, strips, rods, profile shapes*	0 to 3%	0 to 3%	0%	0-3%	0%	0%	0%	0%	0%	0 to 3%	0 to 3%	0%	0 to 3%	0%	0 to 3%	0%	0 to 3%	0 to 3%	0%
4009	Tubes , pipes hoses*	0-3%	0-3%	0%	0-3%	0%	0%	0%	0%	0%	3%	3%	0%	3%	0%	3%	0%	3%	3%	0%
4010	Conveyor and transmission belts*	6,5%	6,5%	0%	6,5%	0%	0%	0%	0%	0%	6,5%	6,5%	0%	6,5%	4,3%	6,5%	0%	6,5%	6,5%	0%
4015	Apparel+clothing accessories*	2 to 5%	2 to 5%	0%	2-5%	0%	0%	0%	0%	0%	2-5%	2-5%	0%	2-5%	0%	2-5%	0%	2-5%	2-5%	0%

¹ GSP Beneficiary

* 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

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