

European Tyre & Rubber Industry

Statistics

EDITION 2016



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

2014/2015 Key Figures

VEHICLE DATA from 2008 to 2015 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

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 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 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.

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

Tyre Corporate*

National Associations Affiliated members



www.apollovredestein.com



www.bridgestone.eu



Belgium
www.federplast.be



France
www.lecaoutchouc.com



Tyre Corporate – BRISA
www.brisa.com.tr



Tyre Corporate – MARANGONI
www.marangoni.com



www.conti-online.com



www.coopertire.co.uk



Germany
www.wdk.de



The Netherlands
www.vereniging-nvr.nl



National Association – UK: BTMA
www.btmauk.com



www.goodyear.eu



www.hankooktire.com



Finland
www.kumiteollisuus.fi



Hungarian Tire Association
www.hta.org.hu/



www.michelin.com



www.nokiantyres.com



www.federazionegommaplastica.it



www.pzpo.org.pl



www.pirelli.com



www.trelleborg.com



Spain
www.consortiocaucho.es

* Mitas was bought by Trelleborg in 2016

ETRMA's Secretariat



**The Secretary General,
Fazilet Cinaralp**



**Mirella Larsen,
Office Manager**

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



**TO BE ANNOUNCED,
Coordinator Environment
and Transport**

**Jean Pierre Taverne,
ELT EU Coordinator &
Circular Economy**



**Meglena Mihova,
Coordinator
Chemicals, Materials & HS**

**Marta Conti,
Manager, Trade, Communication
and Parliamentary Affairs**



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2014/2015 Key Figures

LEGEND

-  2014
-  2015
-  Tyre
-  GRG
- (e) estimated
*except for export/import figures
and tyre sales
-  PC & light truck
-  Truck
-  Medium and heavy commercial vehicles
-  Passenger car

DIRECT EMPLOYMENT



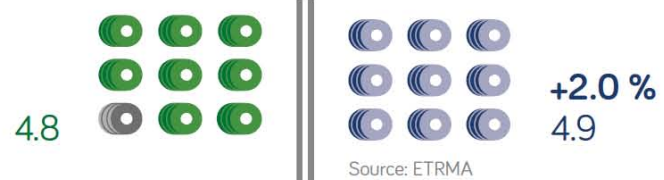
NUMBER OF COMPANIES



GRG PRODUCTION IN MILLION TONNES



TYRES PRODUCTION IN MILLION TONNES

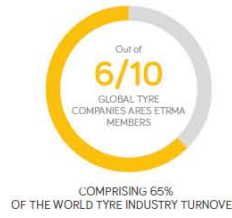
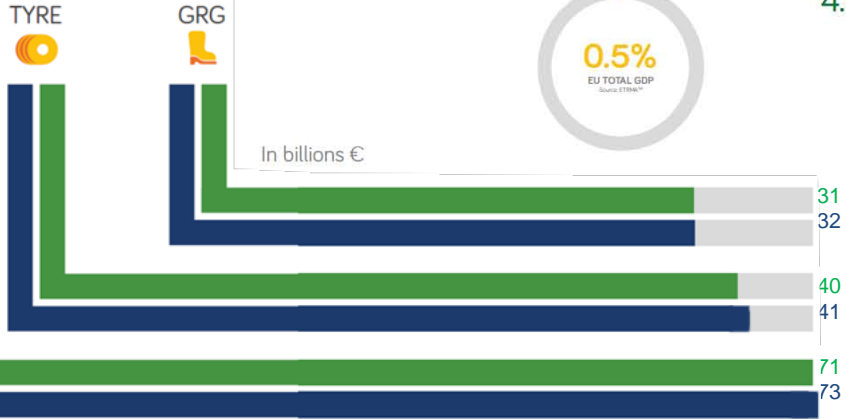


SECTOR VALUE CHAIN/EU GDP



SECTOR TURNOVER

Source: Etrma



2014/2015 Key Figures

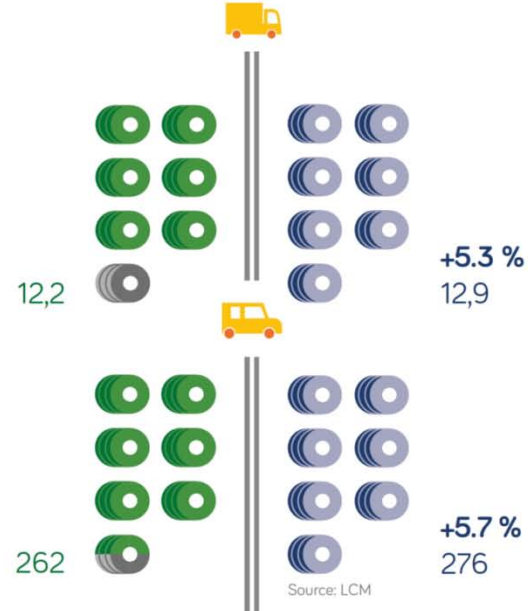
IMPORTS IN B €

EXPORTS IN B €



Source: ETRMA

TYRE SALES IN MILLION OF UNITS



Source: LCM

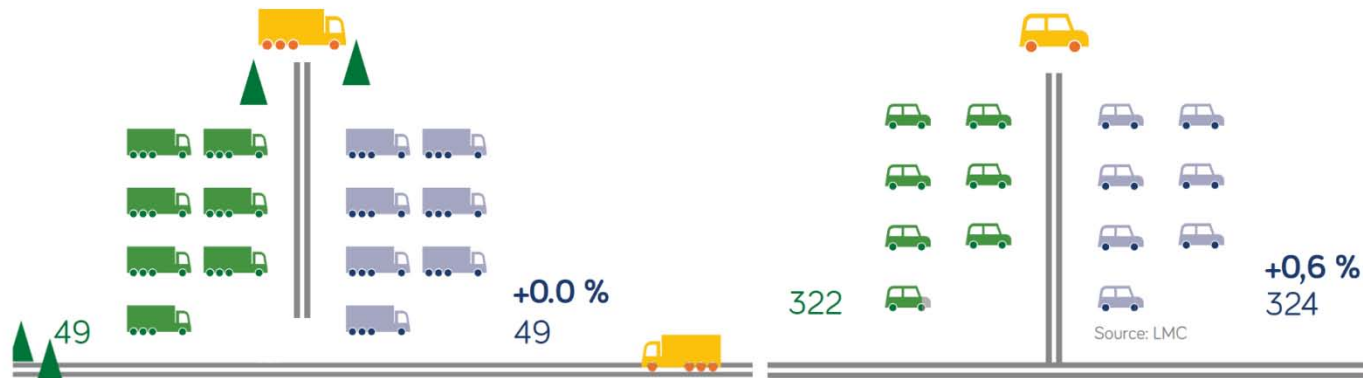
IMPORTS IN MILLION OF TYRES

EXPORTS IN MILLION OF TYRES



Source: ETRMA

VEHICLE PARC IN MILLION OF UNITS



Source: LMC

Vehicle Data

ETRMA

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Evolution of car parc on world major markets

Source: LMC/in 000.000 passenger cars

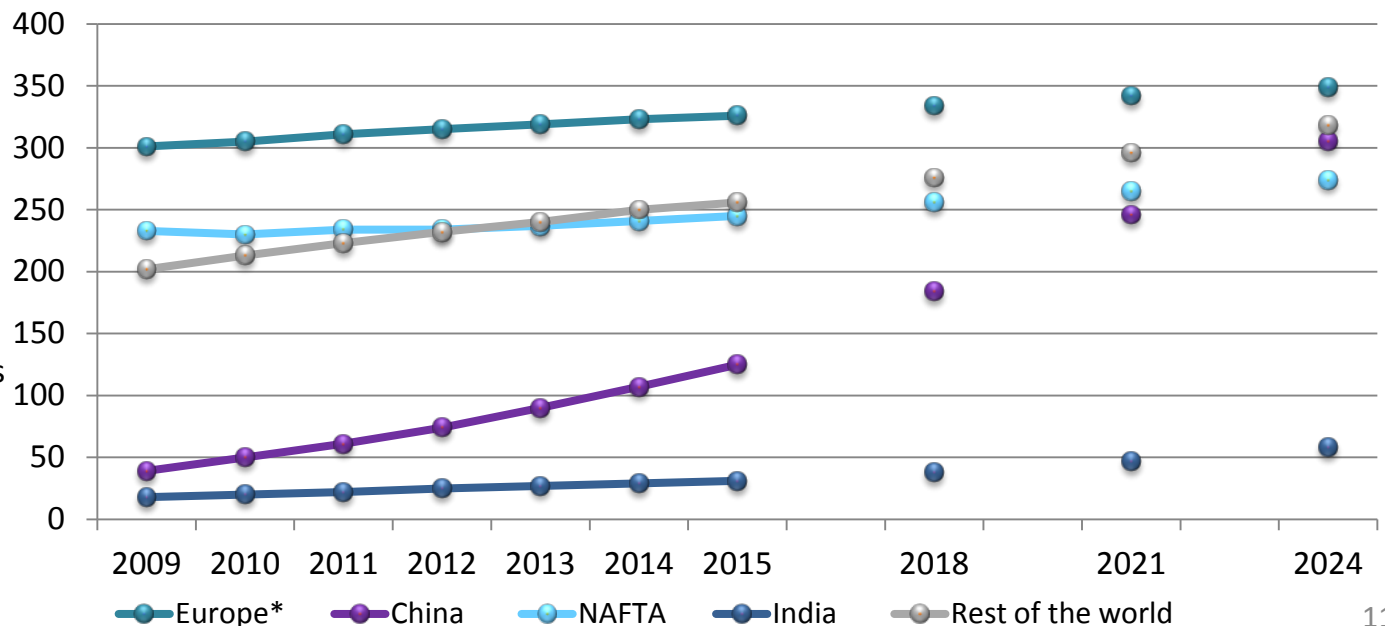
Rest of the world

	2009	2010	2011	2012	2013	2014	2015	2018	2021	2024
Africa	12	12	13	14	14	15	16	18	20	23
ASEAN	22	24	25	27	29	31	33	38	43	48
East Asia	77	78	79	80	81	83	84	86	87	87
Middle East	32	37	40	42	44	46	47	53	59	66
Oceania	15	15	16	16	16	17	17	18	19	20
South America	44	47	50	53	56	58	59	63	68	74
Europe*	301	305	311	315	319	323	326	334	342	349
China	39	50	61	74	90	107	125	184	246	305
India	18	20	22	25	27	29	31	38	47	58
NAFTA	233	230	234	234	237	241	245	256	265	274

*Europe includes all of Eastern, Central and Western Europe

India: in 2015, LMC removed the double counting of some buses. Furthermore, CV imports have also been reduced to bring them in line with official trade data.

NAFTA: double counting of buses was also removed from NAFTA. Furthermore, pick-up trucks were removed from LCV segment and placed in the PC one, correcting also historical data.



Evolution of Commercial Vehicle parc on world major markets

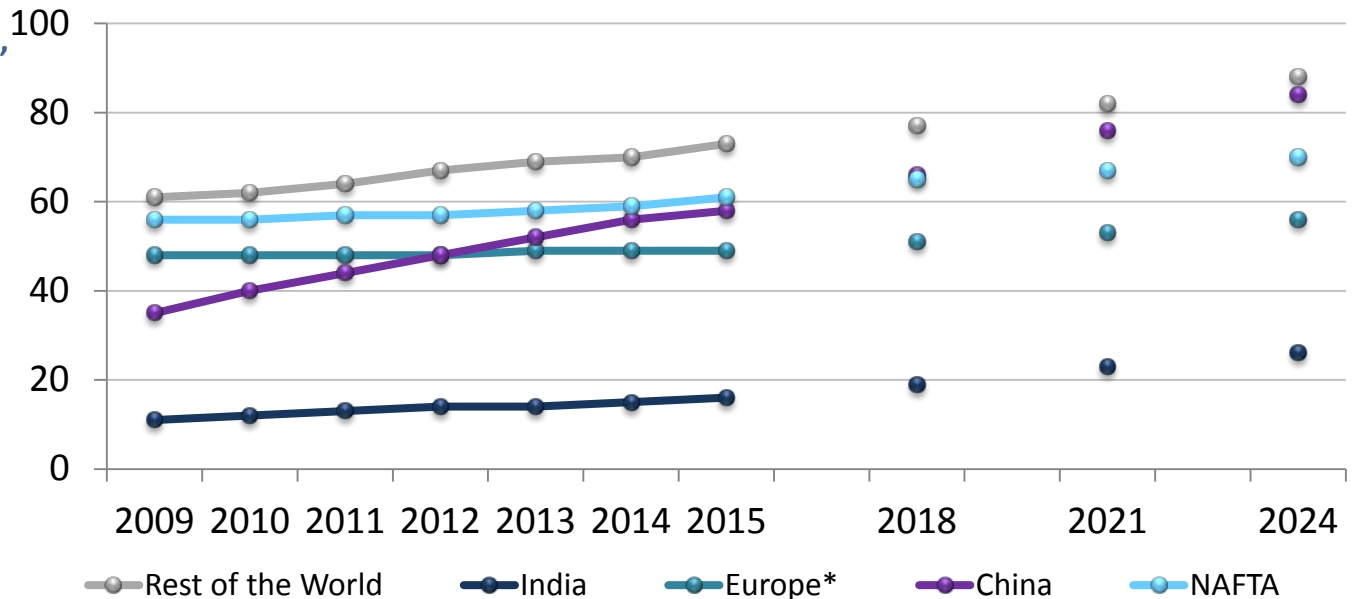
Source: LMC**/in 000.000 units

Rest of the world

	2009	2010	2011	2012	2013	2014	2015		2018		2021		2024
Africa	6	6	6	7	7	8	8		9		10		10
ASEAN	15	15	16	17	18	18	19		21		24		26
East Asia	22	22	22	22	22	21	21		21		20		20
Middle East	11	12	12	13	14	14	15		17		19		21
Oceania	4	4	4	4	4	4	5		5		5		6
South America	14	15	16	17	18	19	20		21		23		26
Europe*	48	48	48	48	49	49	49		51		53		56
China	35	40	44	48	52	56	58		66		76		84
India	11	12	13	14	14	15	16		19		23		26
NAFTA	56	56	57	57	58	59	61		65		67		70

*Europe includes all of Eastern, Central and Western Europe

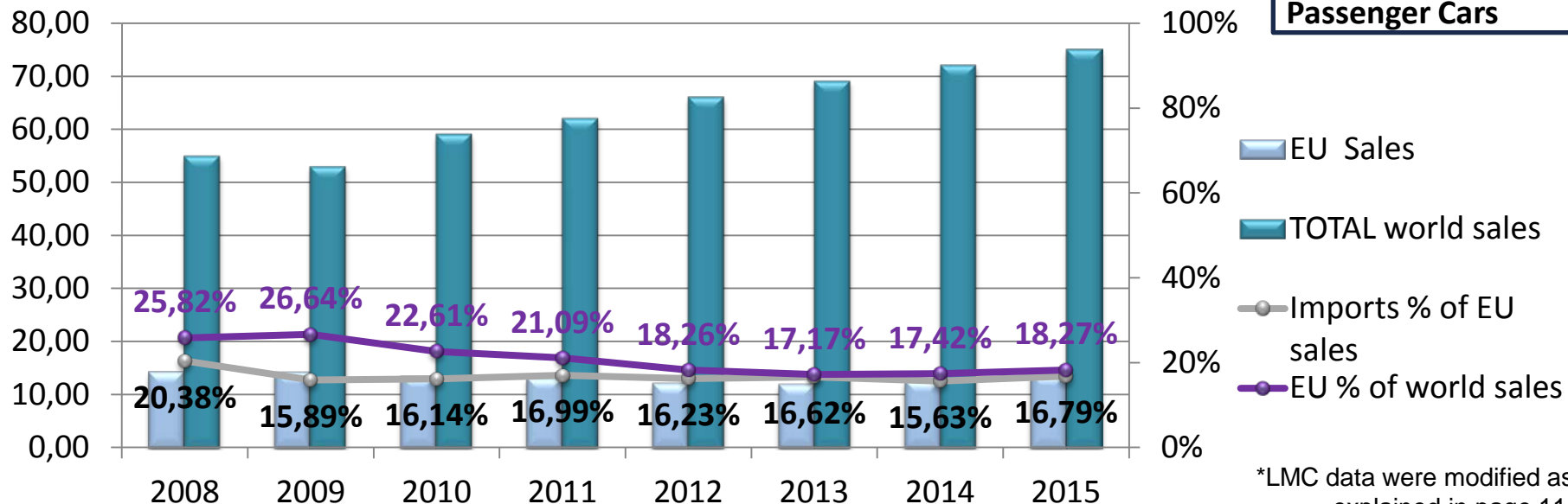
**LMC data were modified as explained in page 12.



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

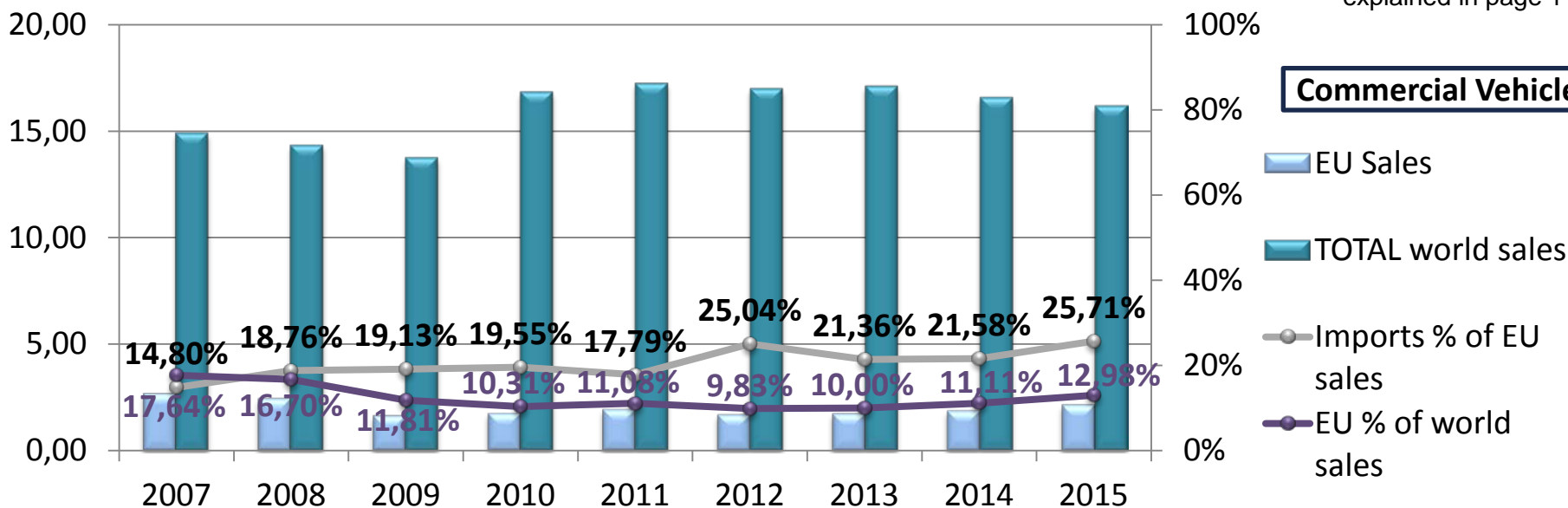
Source: LMC*, ACEA and Eurostat/in 000.000 units

Passenger Cars



*LMC data were modified as explained in page 11.

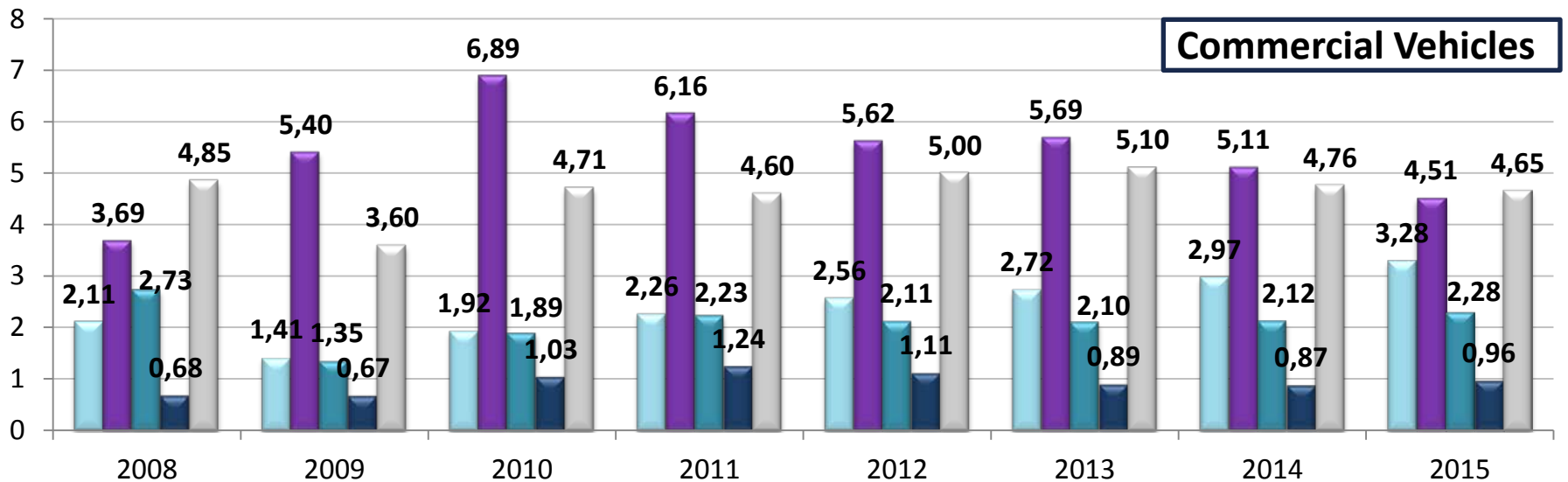
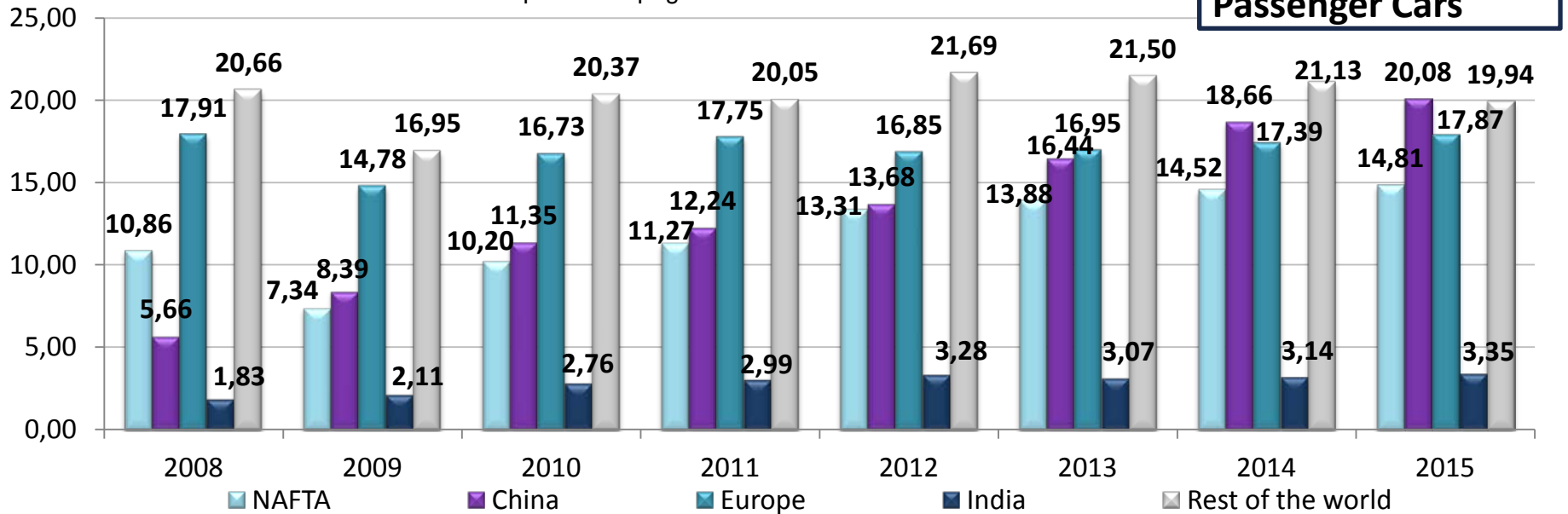
Commercial Vehicles



Production of passenger cars, LCV and MHCV - major markets

Source: LMC */in 000.000 units

*LMC data were modified as explained in page 11.



GENERAL RUBBER GOODS

ETRMA

2014/2015 Key Figures

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GENERAL RUBBER GOODS Production and Trade

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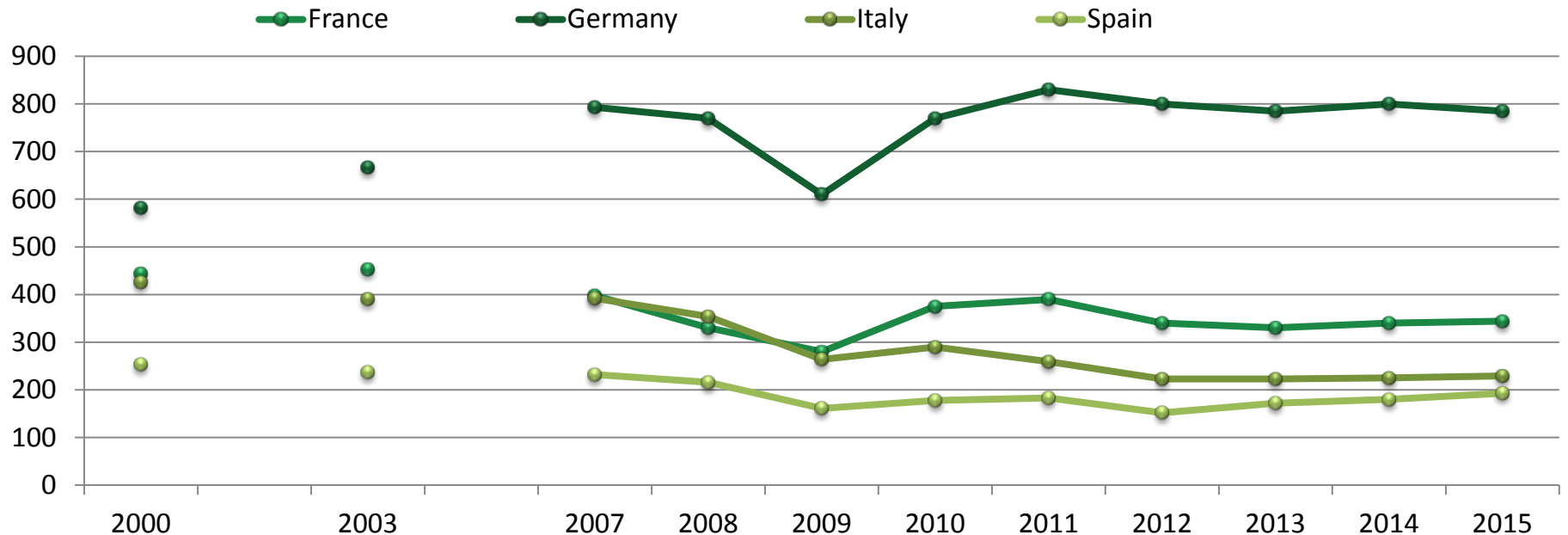
RUBBER

Appendix: Export and Import Tariffs

Evolution of GRG production*

Source: ETRMA/in 000 tonnes











	2000	2003	2007	2008	2009	2010	2011	2012	2013	2014	2015
France	444	453	398	330	280	375	390	340	330	340	344
Germany	582	667	793	770	610	770	830	800	785	800	785
Italy	426	391	392	354	264	290	259	223	223	225	229
Spain	253	237	232	216	161	178	183	168	172	180	193



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

Top 10 global GRG companies

Source: ERJ

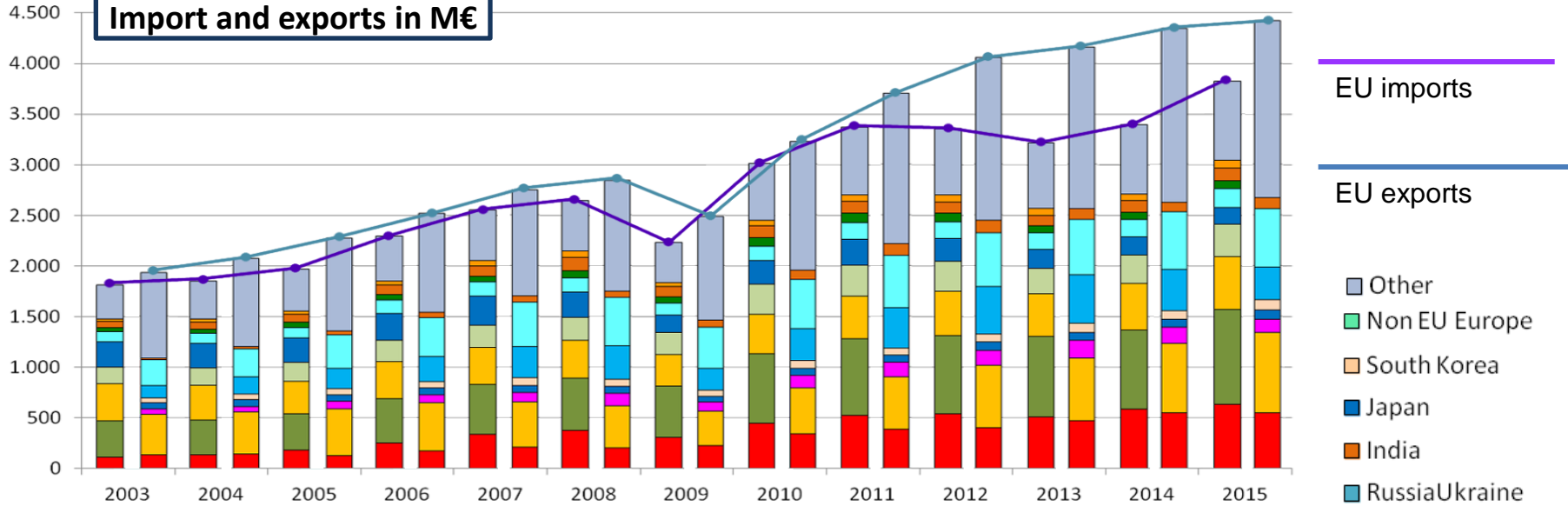
Rank 2015	Rank 2014	Company	Headquarter	2015 Non tyre rubber sales in \$M	2014 Non tyre rubber sales in \$M	Variation
1	1	Continental Ag	Germany	5,3	4,7	 13%
2	2	Hutchinson SA	France	4,3	4,6	 -7%
3	3	Freudenberg Group ^(e)	Germany	3,7	4,2	 -12%
4	6	Cooper Standard Auto	USA	3,3	3,2	 3%
5	4	Sumitomo Riko ^(e)	Japan	3,1	3,5	 -11%
6	5	Bridgestone Corp. ^(e)	Japan	3,1	3,4	 3%
7	7	Gates Corp ^(e)	USA	3	3.1	 -11%
8	8	NOK Inc. ^(e)	Japan	2,9	2,9	 -9%
9	10	Parker-Hannifin Corp ^(e)	USA	2,5	2,6	 0%
10	9	Trelleborg AB	Sweden	2,5	2,7	 4%

^(e)= estimate

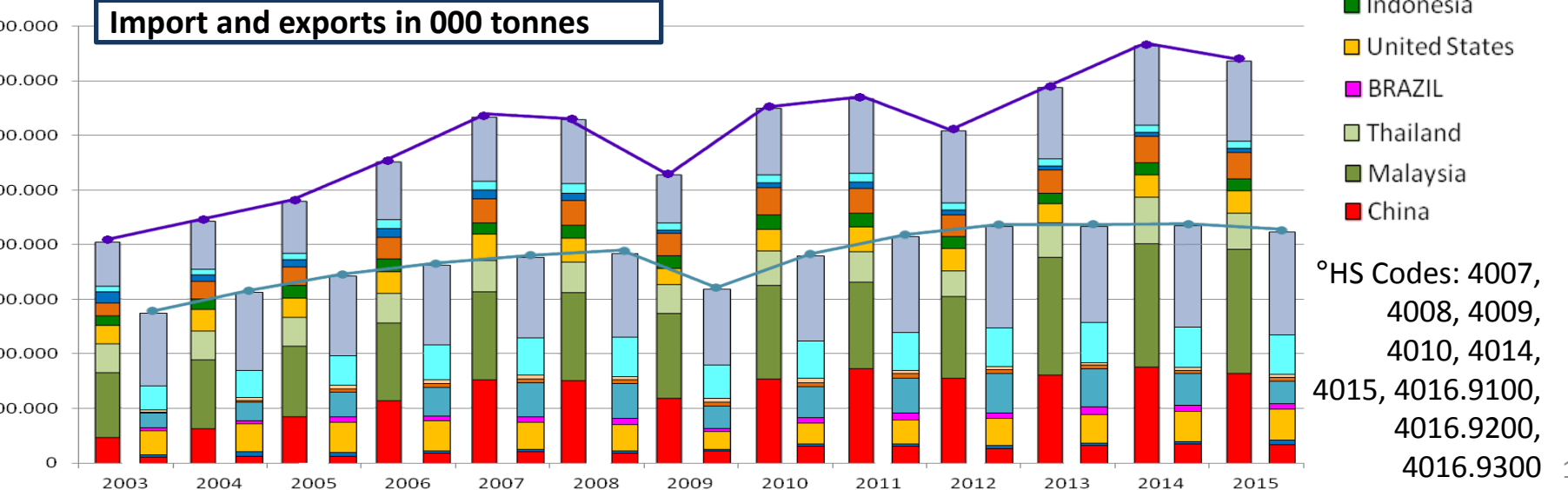
GRG° Import/Export

Source: Eurostat

Import and exports in M€



Import and exports in 000 tonnes



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

TYRES

ETRMA

2014/2015 Key Figures

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beyond

GENERAL RUBBER GOODS Production
and Trade

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

RUBBER

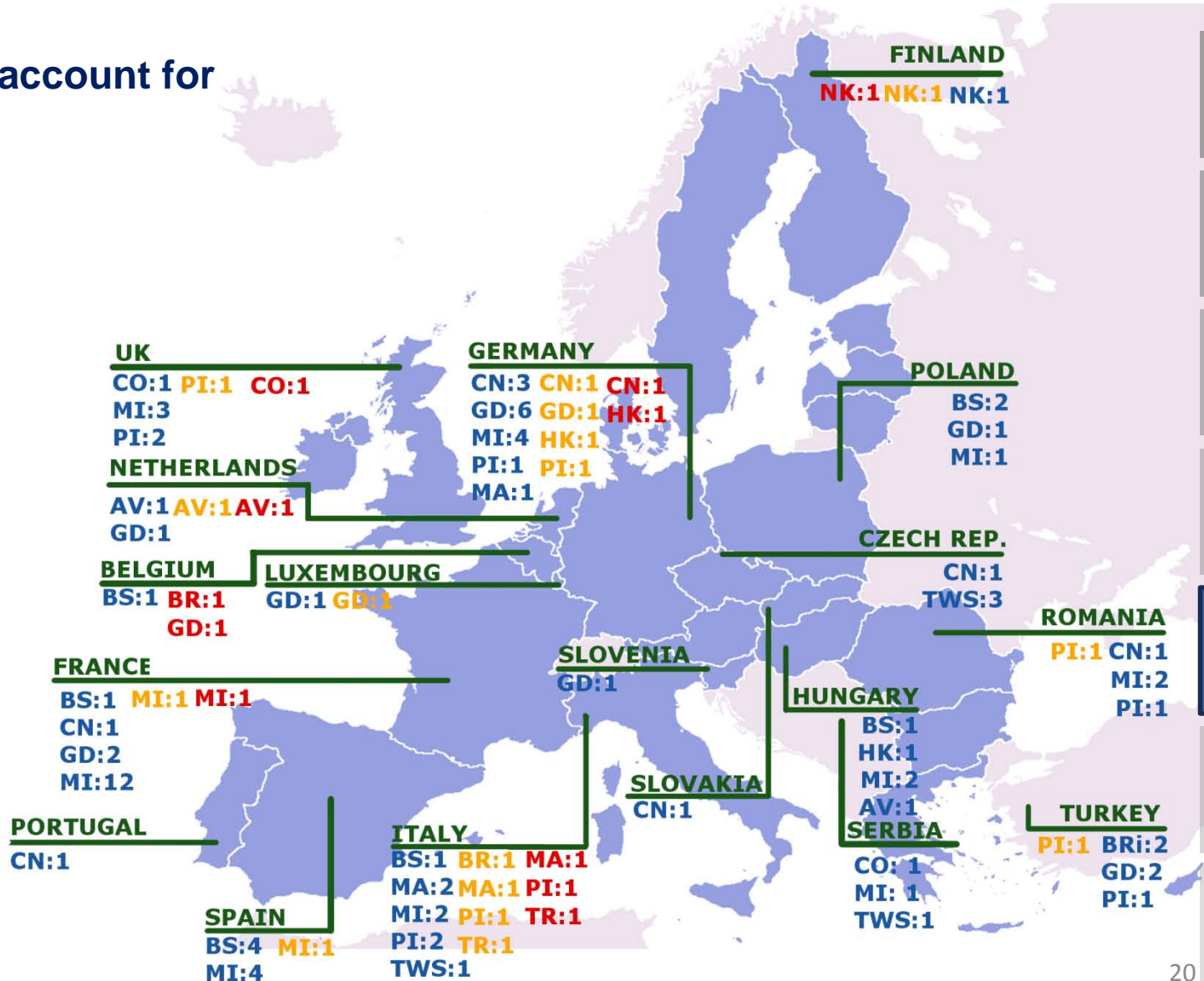
Appendix: Export and Import Tariffs

ETRMA's tyre companies plants

Situation at Jan. 2017

ETRMA members account for

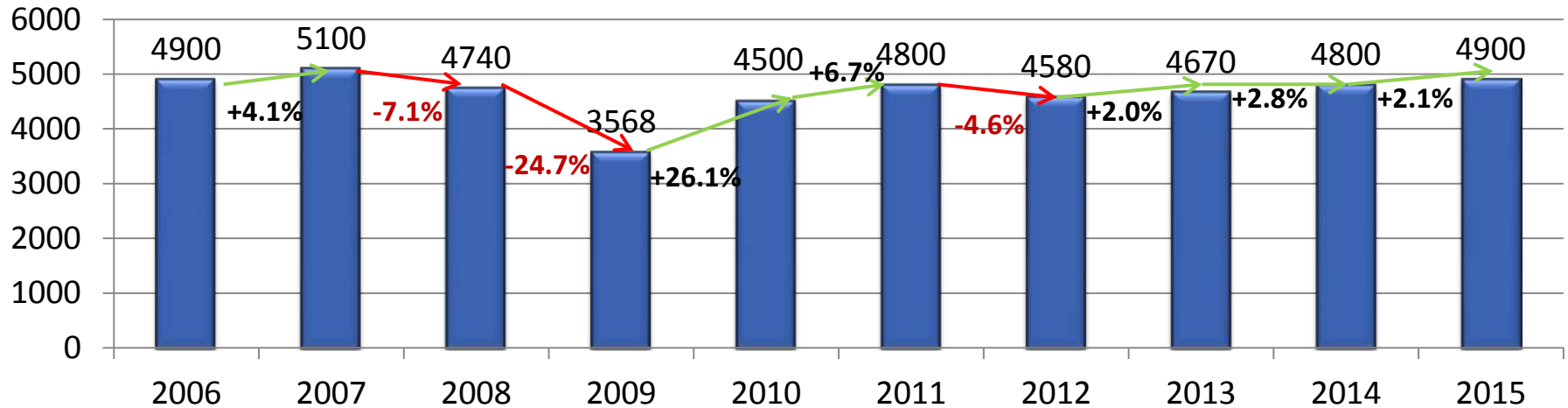
- 86 tyre plants
- 16 R&D centres
- 11 HQs



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

EU tyre production and ranking of world tyre companies' sales

Source: ETRMA/000 tonnes and Tyre and Accessories



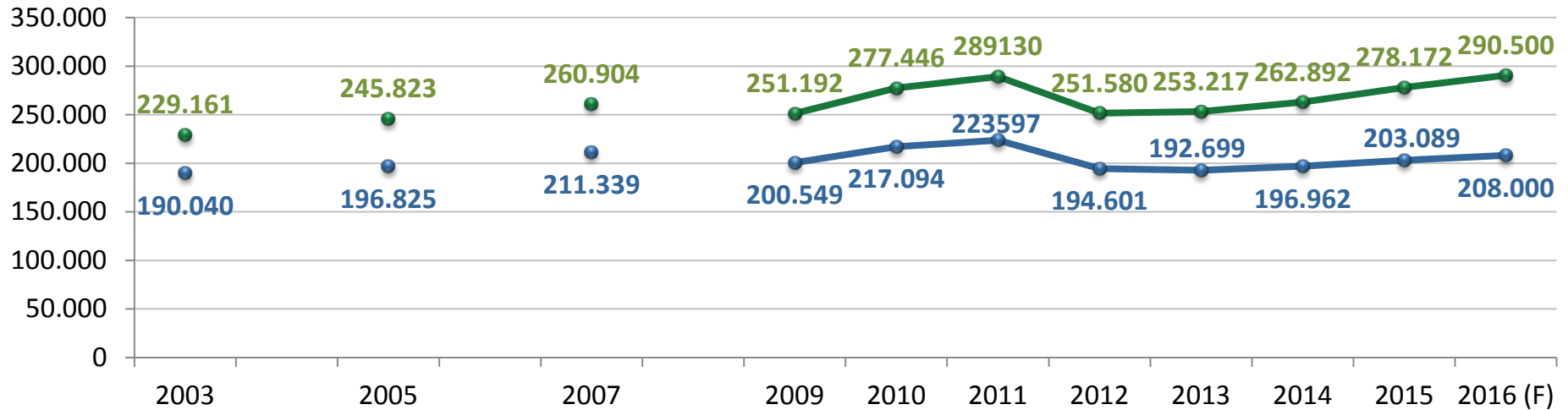
2015	2014	Company	Headquarter	2015 sales in €M	2014 sales in €M	Variation
1	1	Bridgestone ^(e)	Japan	24.233	21.300	↑ 14%
2	2	Michelin ^(e)	France	20.775	19.161	↑ 8%
3	3	Goodyear ^(e)	USA	15.103	14.939	↑ 1%
4	4	Continental ^(e)	Germany	10.387	9.784	↑ 6%
5	5	Pirelli	Italy	6.300	6.007	↑ 5%
6	7	Sumitomo	Japan	5.587	5.035	↑ 11%
7	6	Hankook	South Korea	5.018	5.041	↔ 0%
8	8	Yokohama	Japan	3.820	3.426	↑ 12%
9	9	Maxxis	Taiwan	3.262	3.358	↓ -3%
10	11	Giti	Singapore	2.762	2.754	↔ 0%

Europe Commercial and Truck/Bus Tyre Market

Source: Europool and Eurostat/in 000 units

Cars and light truck tyres

HSCode: 4011.1000; 40112010

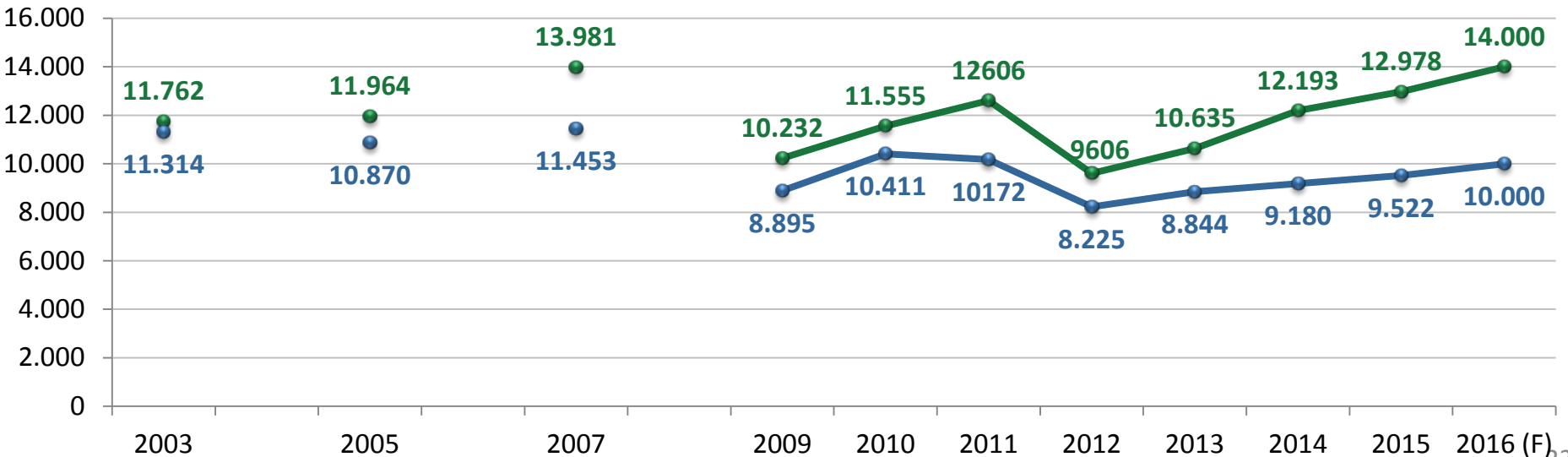


Truck and bus tyres

HS Code: 4011.2090

Tot. Market

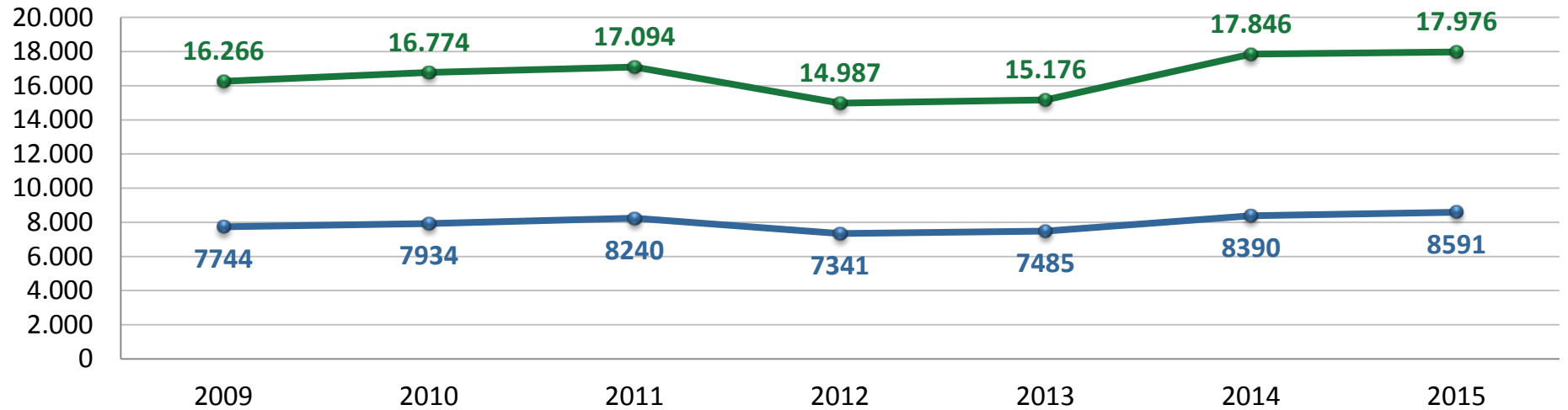
ETRMA Members



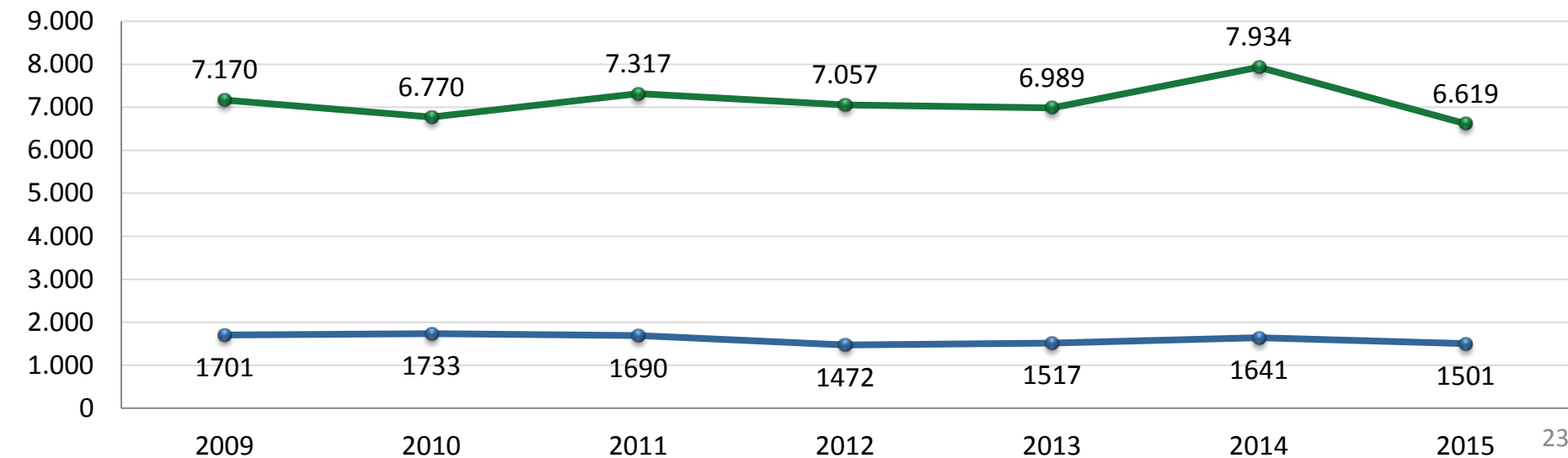
Europe Moto/Scooter and Agri Tyre Market

Source: Europool and Eurostat/ '000 units

Motorcycle and scooter tyres sales in the EU



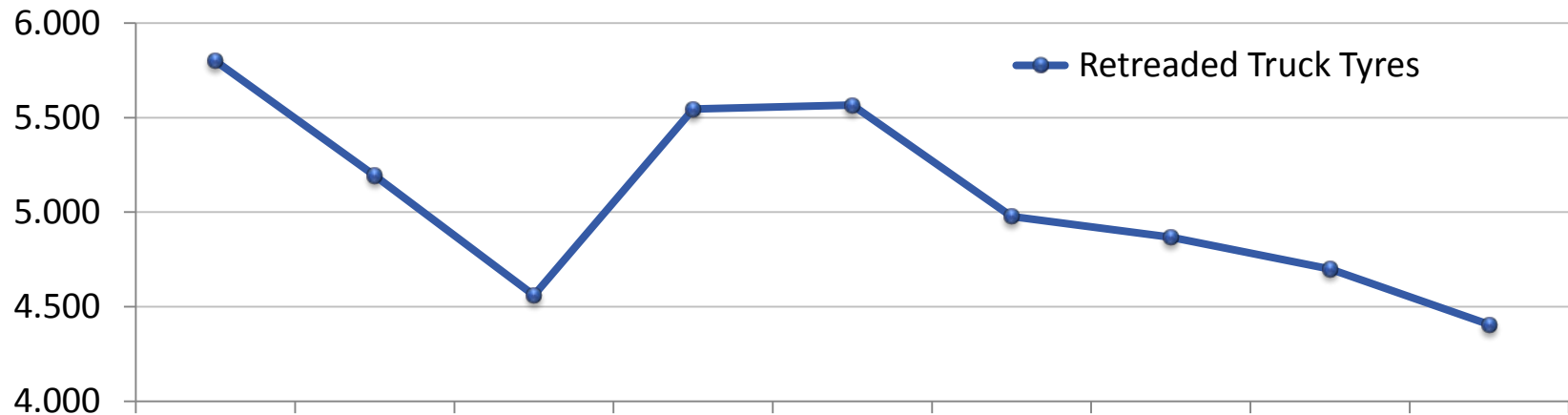
Agricultural tyres sales in the EU



Truck tyre Retreading market in Europe

Source: Europool / 000 units

Retreaded truck tyres

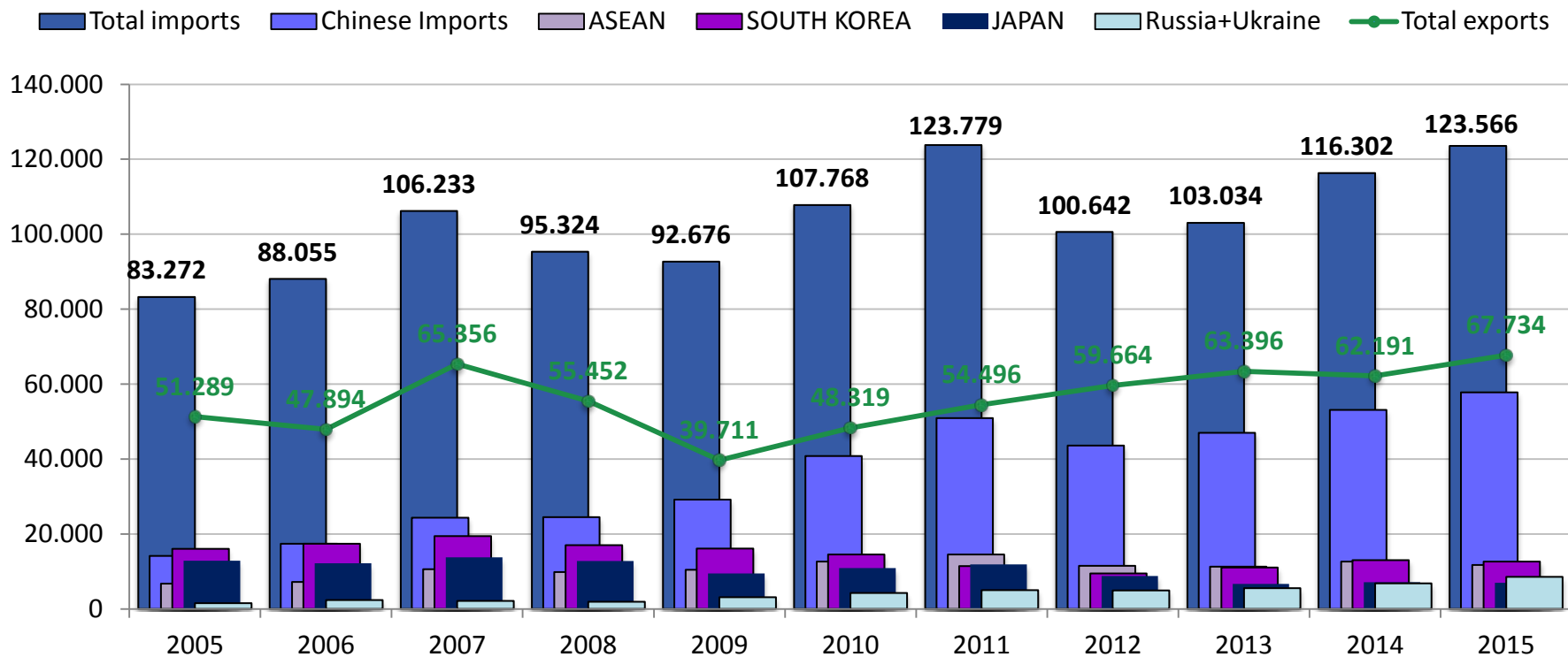


	2007	2008	2009	2010	2011	2012	2013	2014	2015
Retreaded Truck Tyres	5.800	5.193	4.561	5.546	5.567	4.978	4.867	4.699	4.406

Imports of passenger and light vehicles tyres

Source: Eurostat/ Trade in 000 units

Total Imports and main import origins

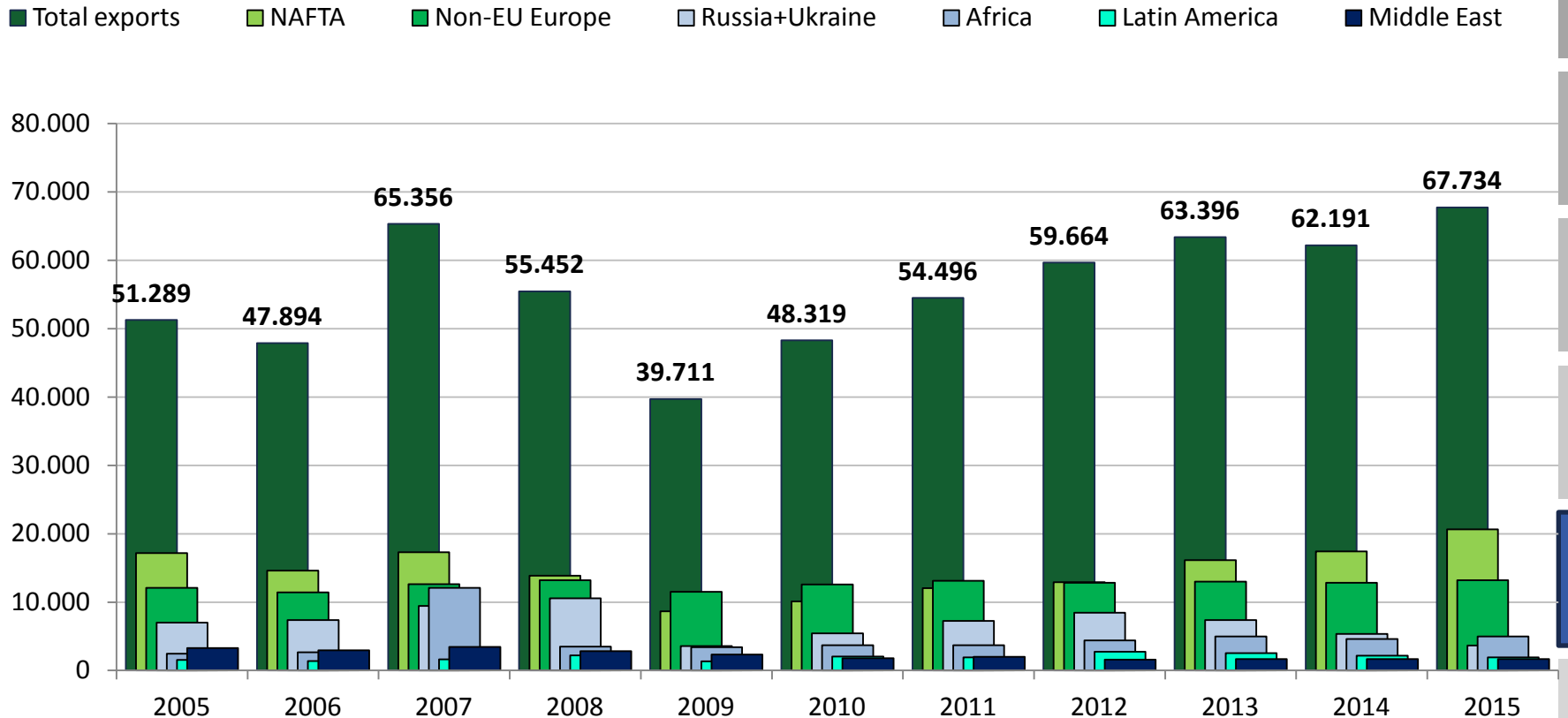


Imports from these five countries constitute 79% of all EU imports

Exports of passenger and light vehicles tyres

Source: Eurostat/ Trade in 000 units

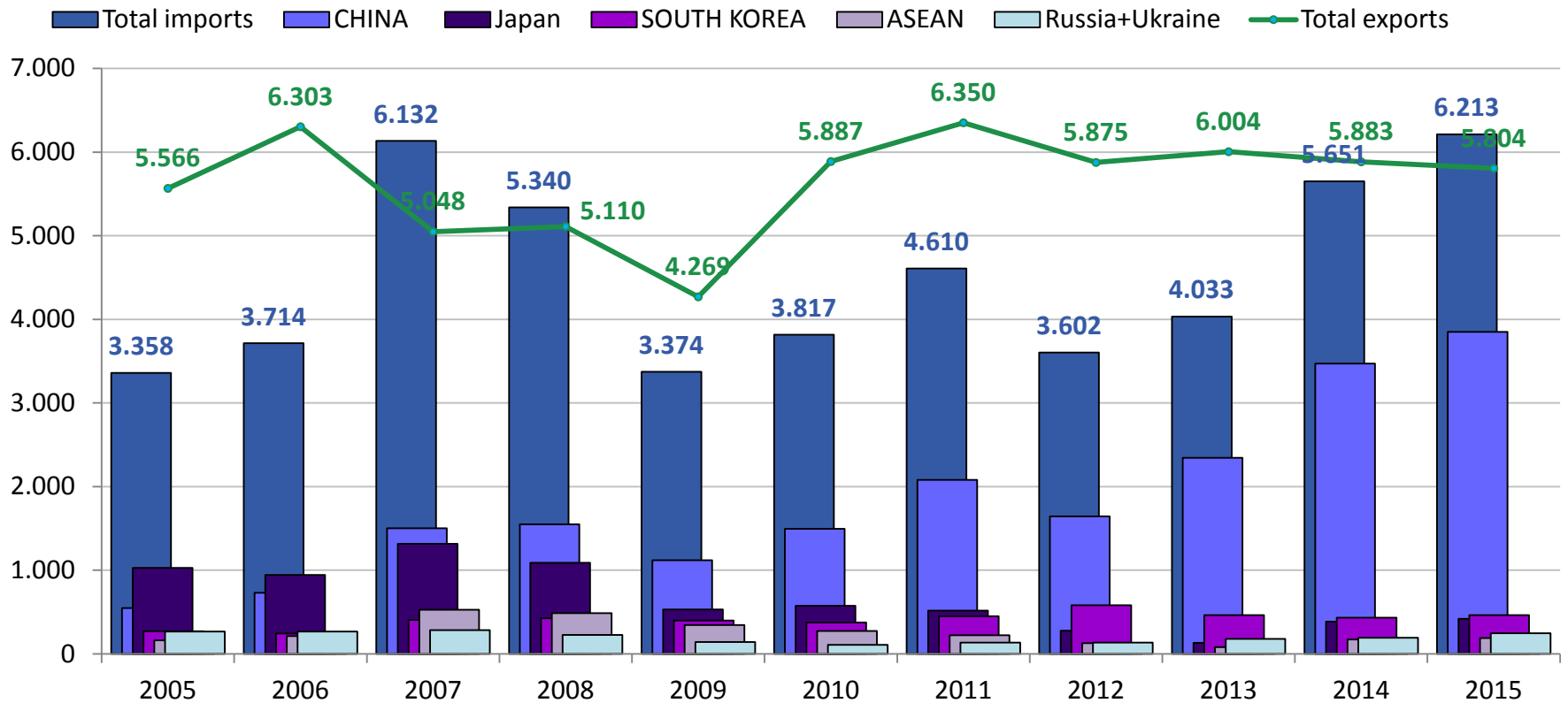
Total Exports and main export destinations



Imports of truck and bus tyres

Source: Eurostat/ Trade in 000 units

Total Imports and main import origin

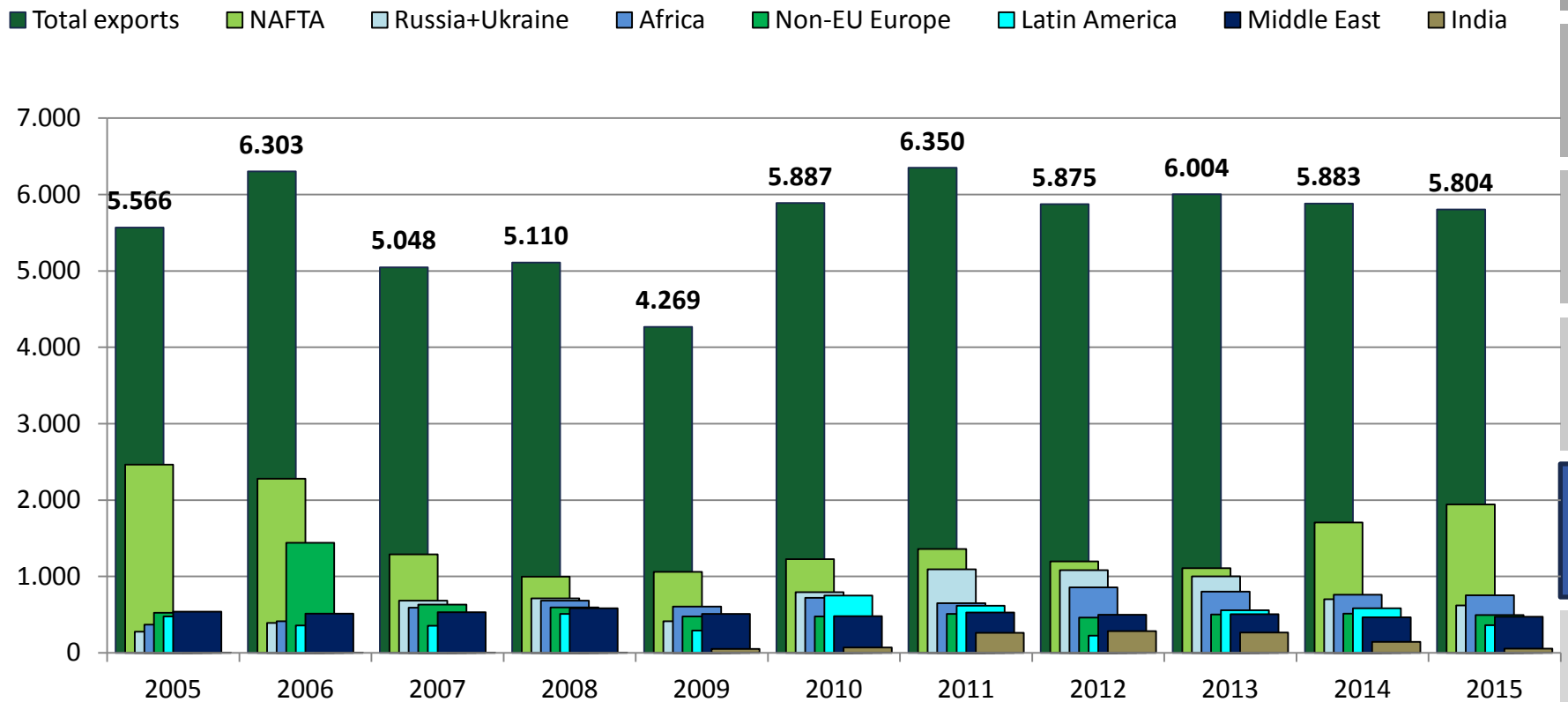


Imports from these five countries constitute 83% of all EU imports

Exports of truck and bus tyres

Source: Eurostat/ Trade in 000 units

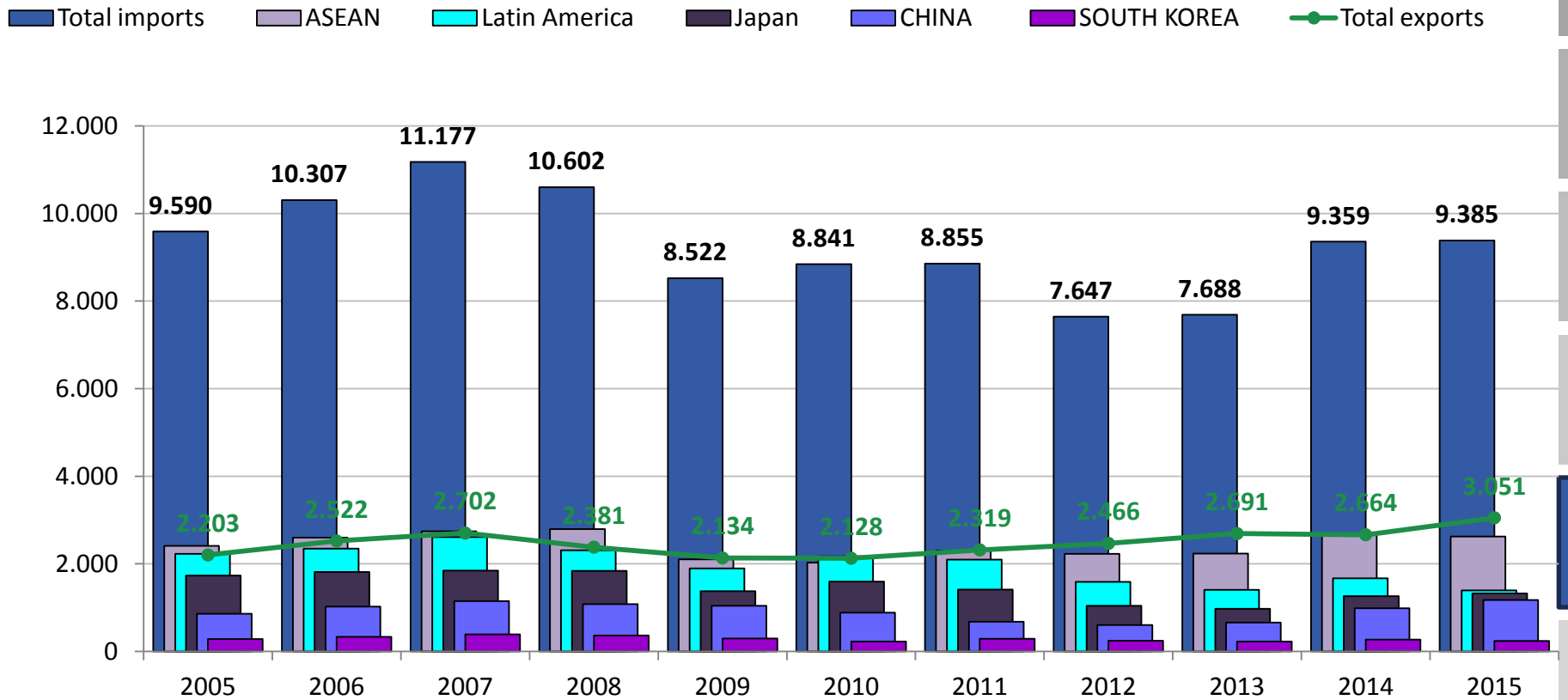
Total Exports and main export destinations



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

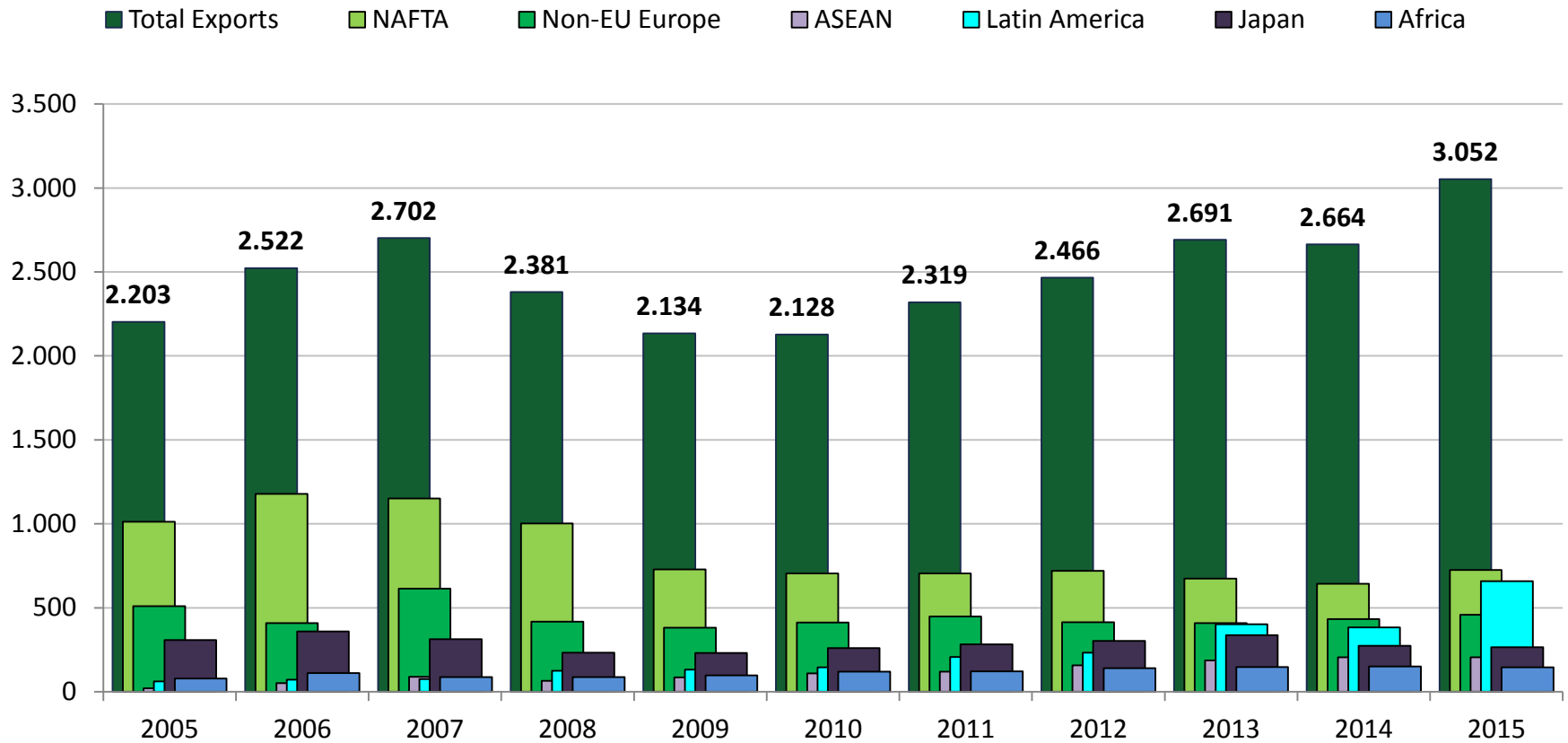
Total Imports and main import origin



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

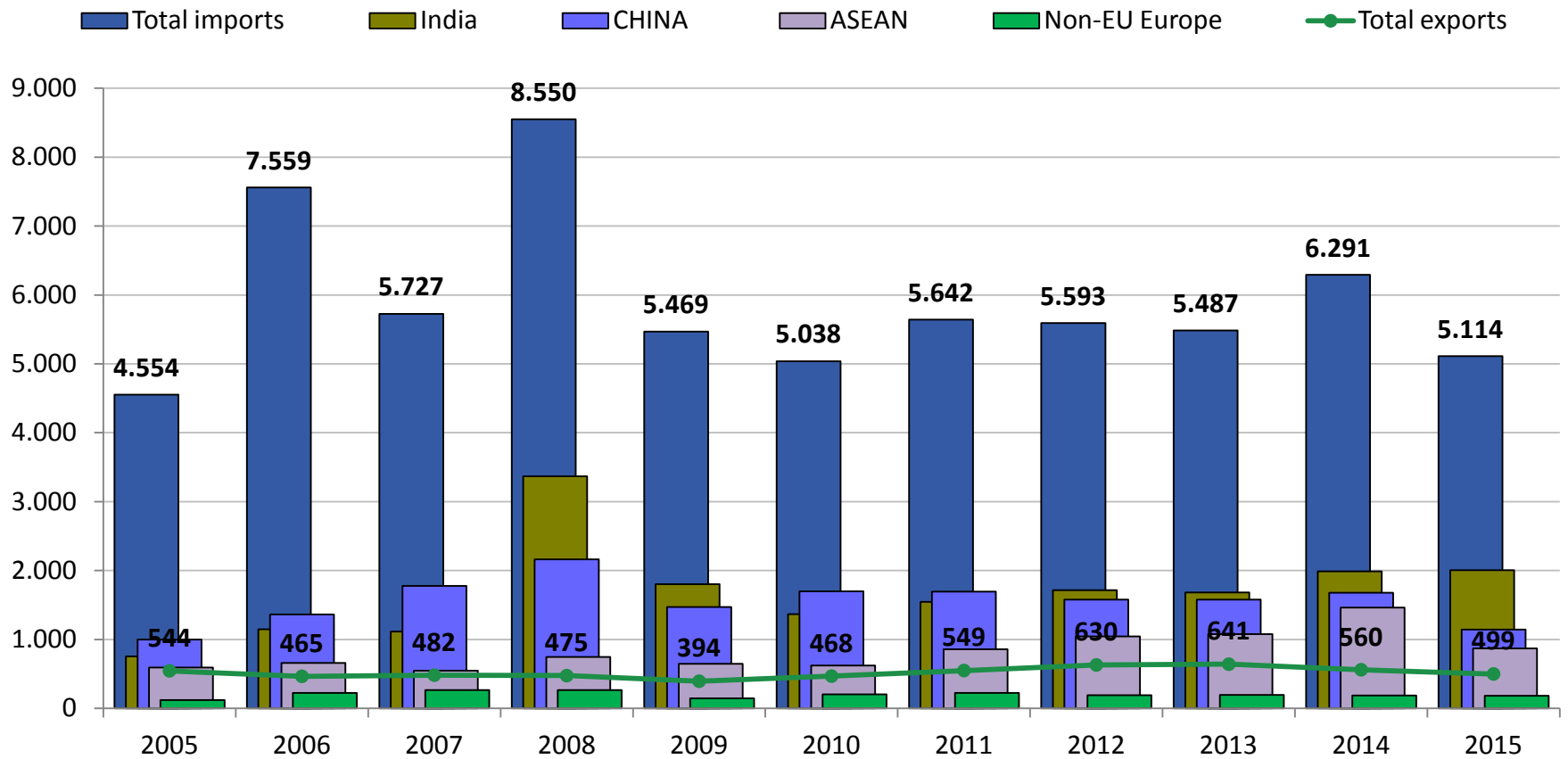


Imports of agricultural tyres*

Source: Eurostat/ import and exports in 000 units

*HS Code: 4011.6100 and 4011.9200

Total Imports and main import origins

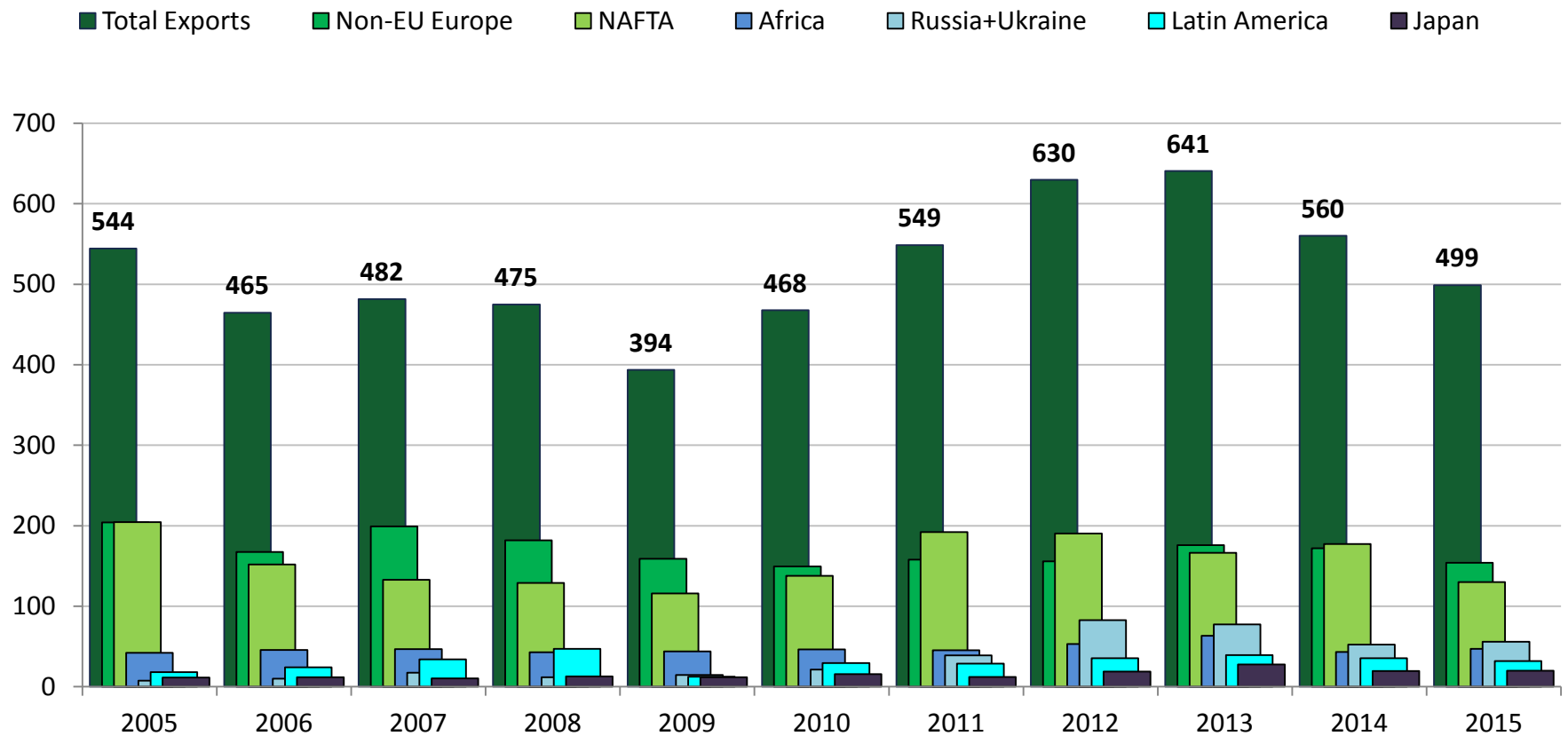


Exports of agricultural tyres*

Source: Eurostat/ import and exports in 000 units

*HS Code: 4011.6100 and 4011.9200

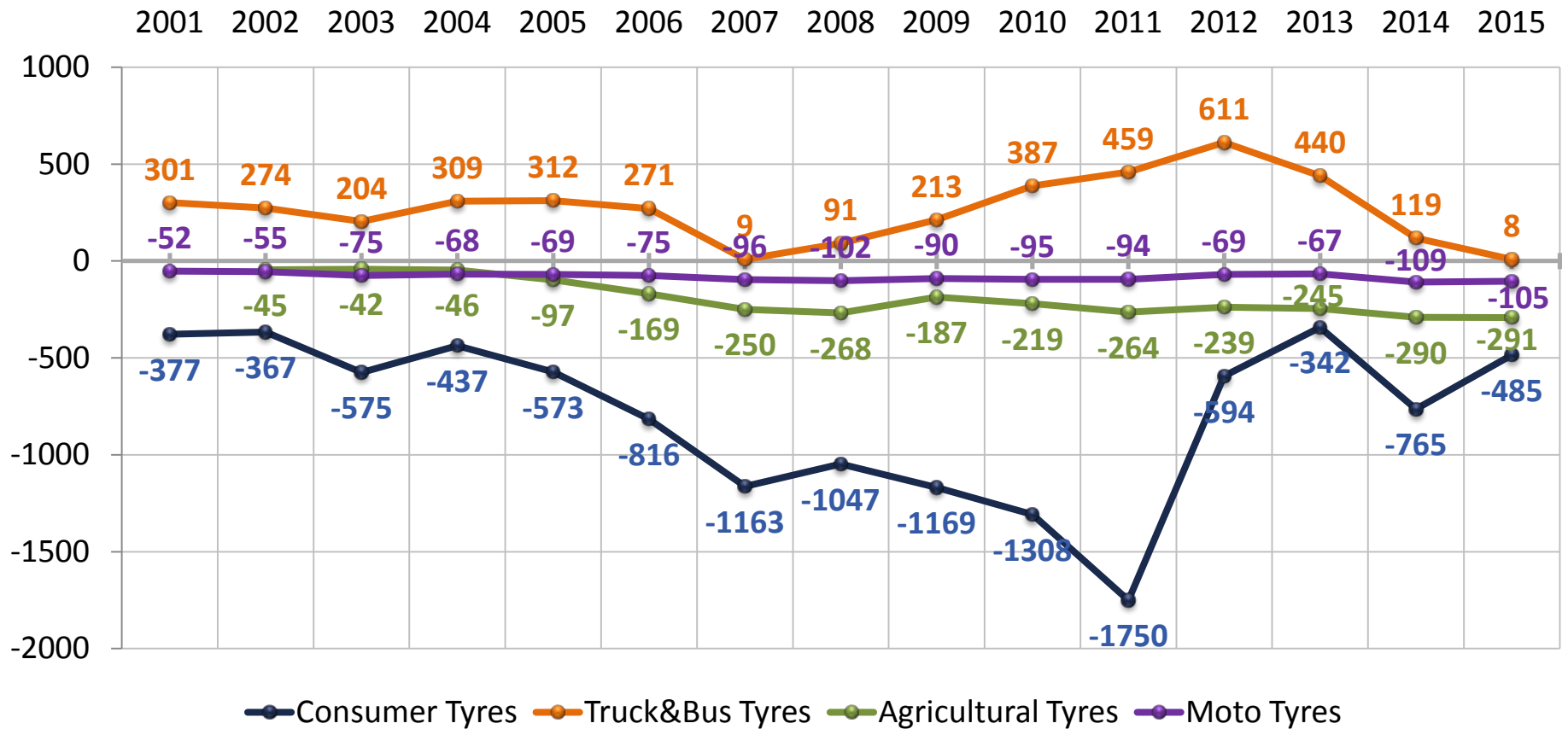
Total Exports and main export destinations



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

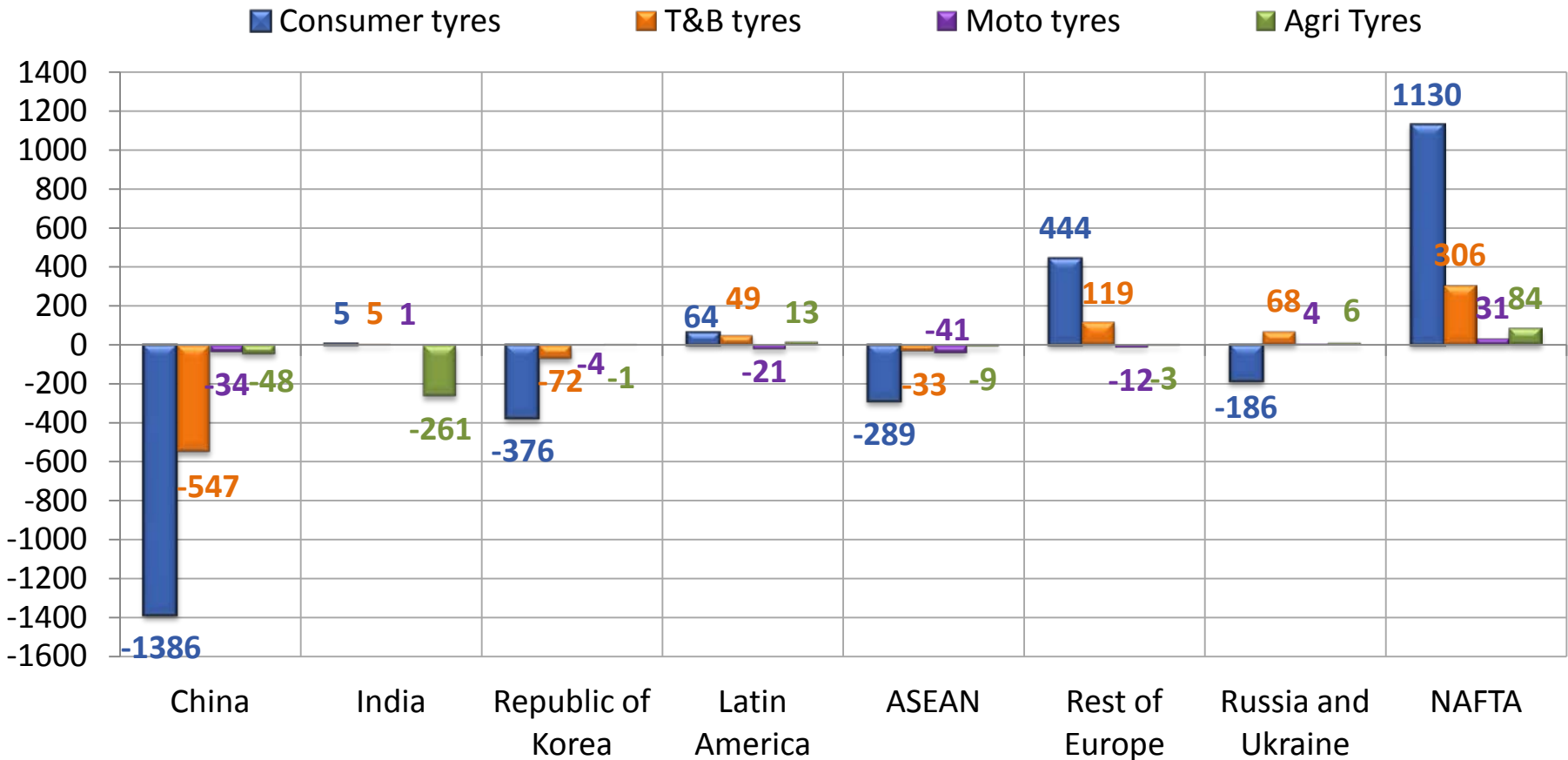
Evolution Trade Balance /tyre type



Trade Balance – all tyre types

Source: Eurostat/ trade balance in EUR Million

Trade Balance 2015/tyre type and commercial partner

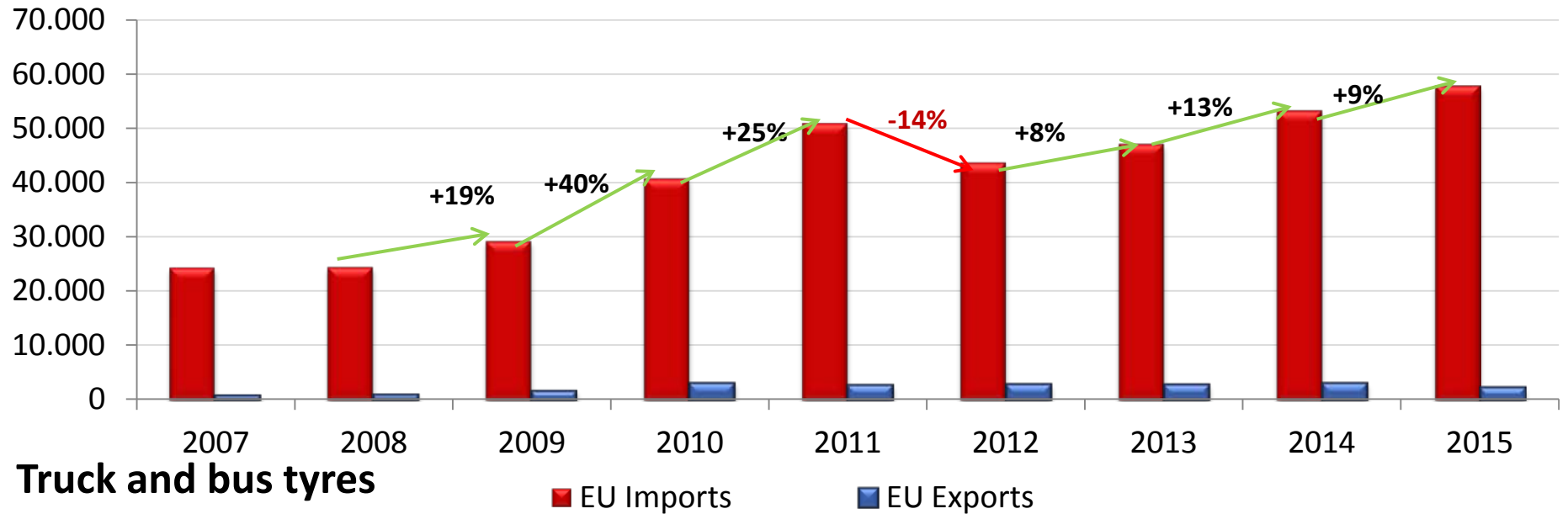


“Rest of Europe” includes the following countries: Albania, Bosnia, Switzerland, Croatia, Iceland, Moldova, Montenegro, Norway, Kosovo, Serbia, Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Liechtenstein.

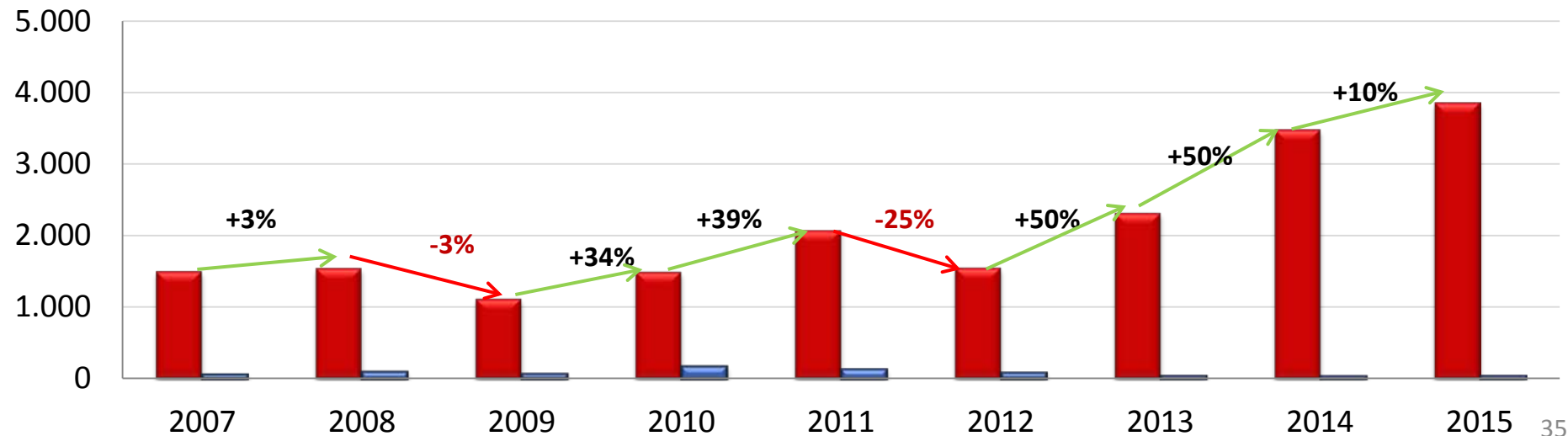
Tyre Import / export with China

Source: Eurostat/000 units

Cars and light truck tyres



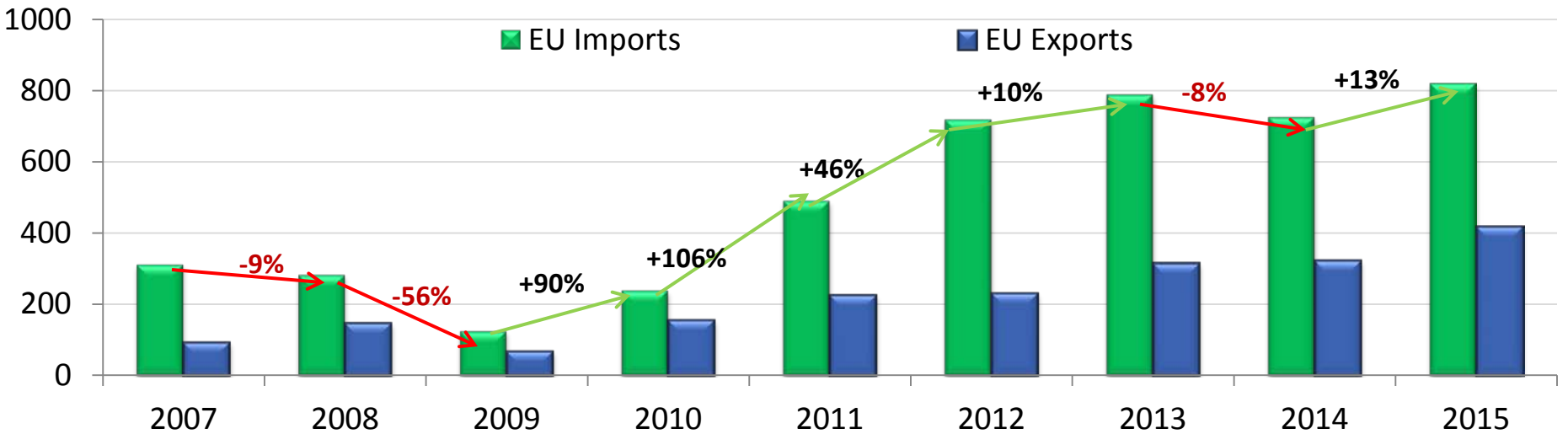
Truck and bus tyres



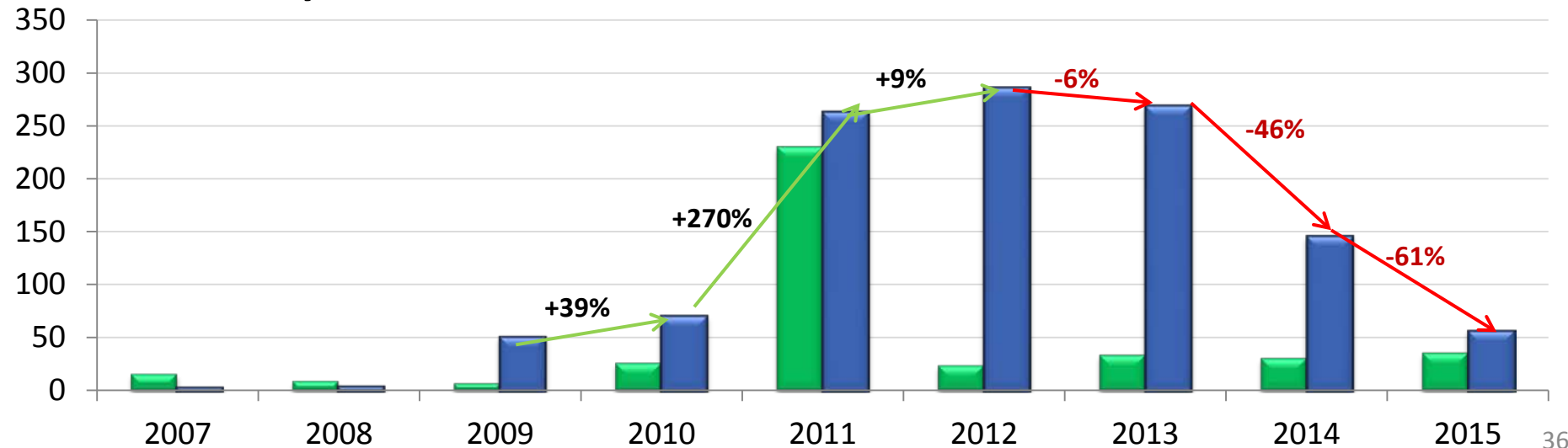
Tyre Import / export with India

Source: Eurostat/000 units

Cars and light truck tyres



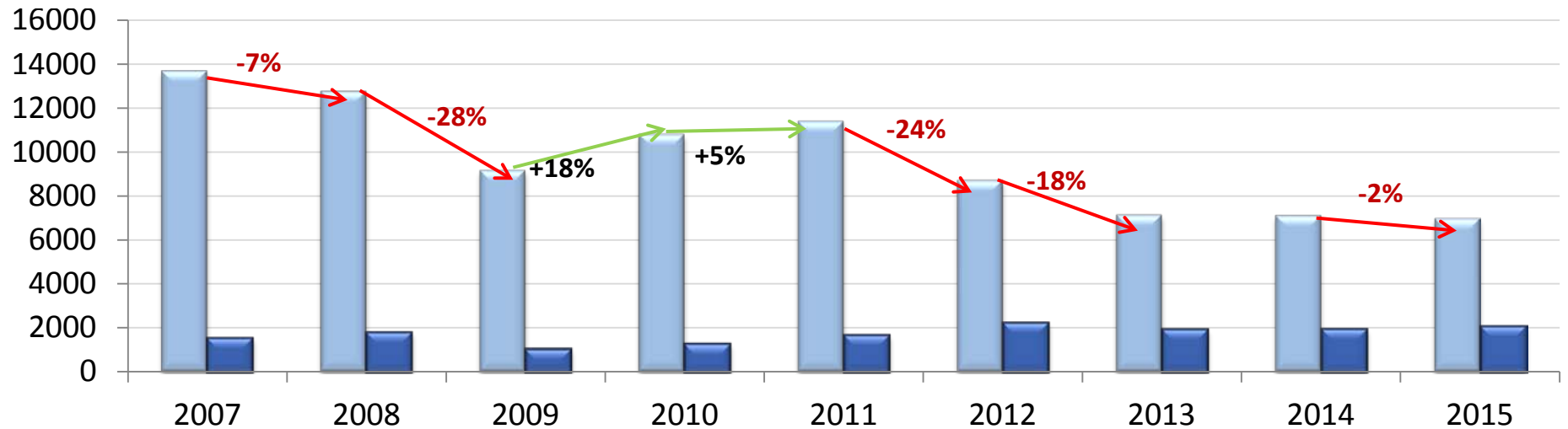
Truck and bus tyres



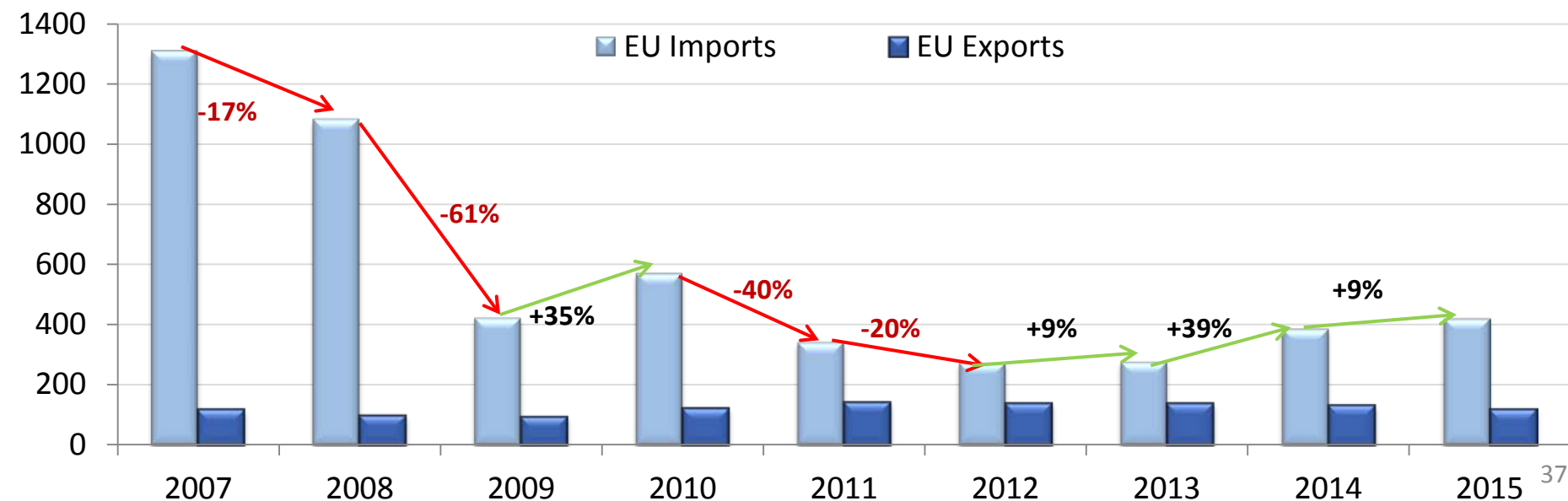
Tyre Import / export with Japan

Source: Eurostat/000 units

Cars and light truck tyres



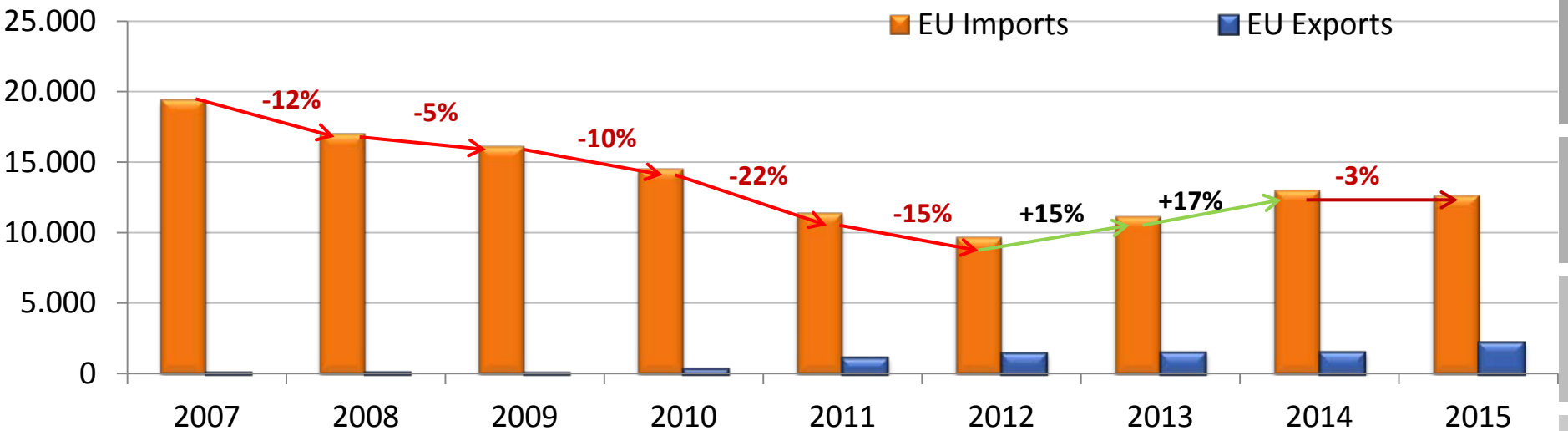
Truck and bus tyres



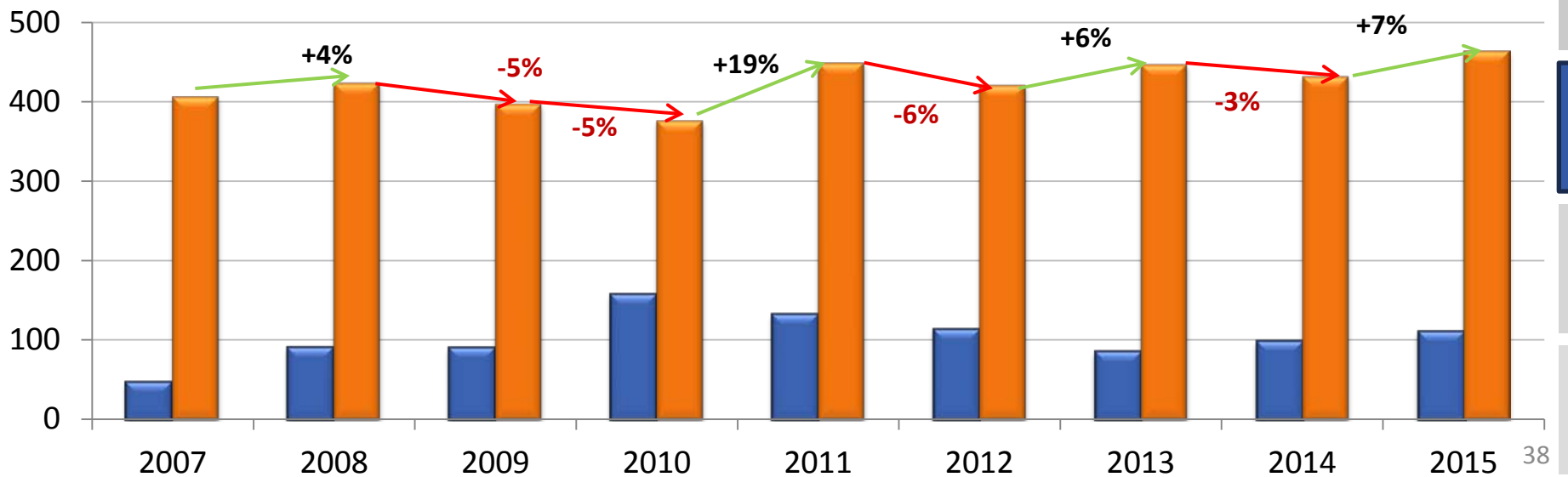
Tyre Import / export with Republic of Korea

Source: Eurostat/000 units

Cars and light truck tyres



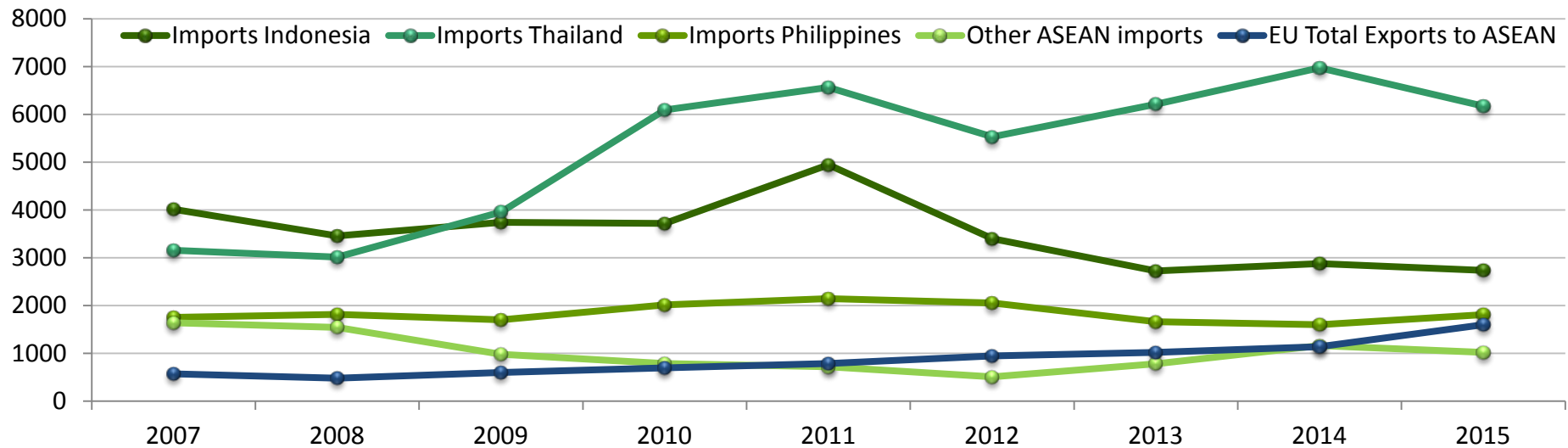
Truck and bus tyres



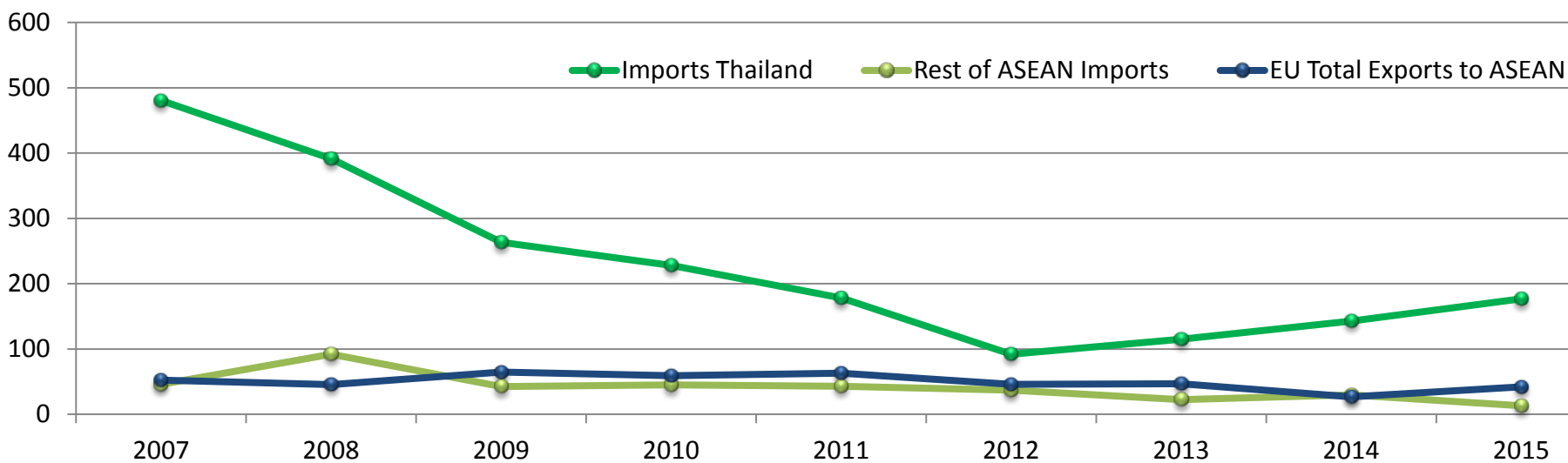
Tyre Import / export with ASEAN

Source: Eurostat/000 units – EU28

Cars and light truck tyres



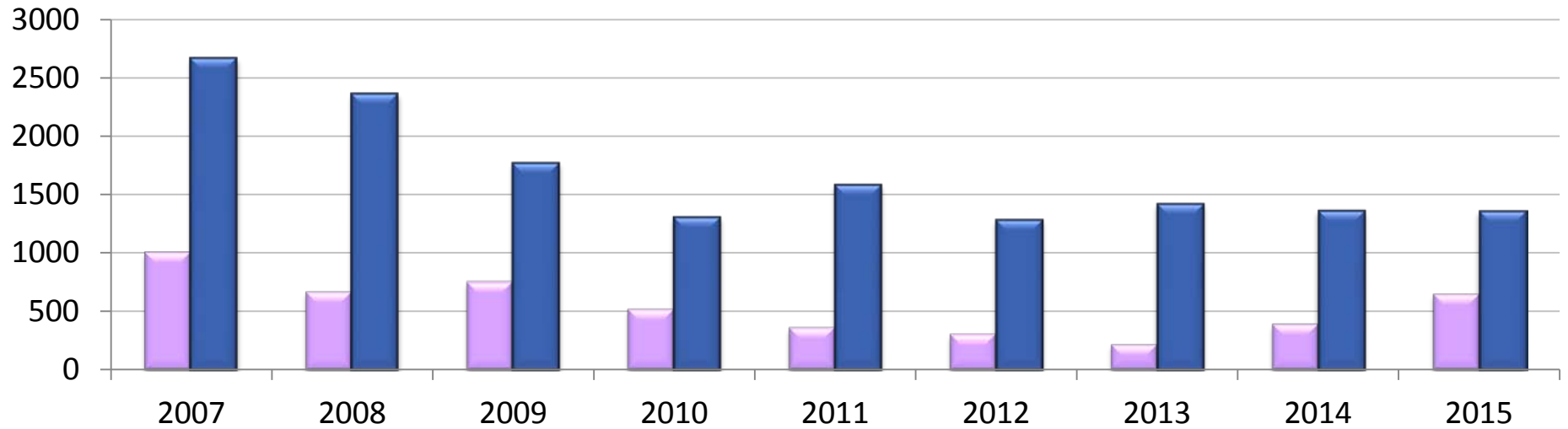
Truck and bus tyres



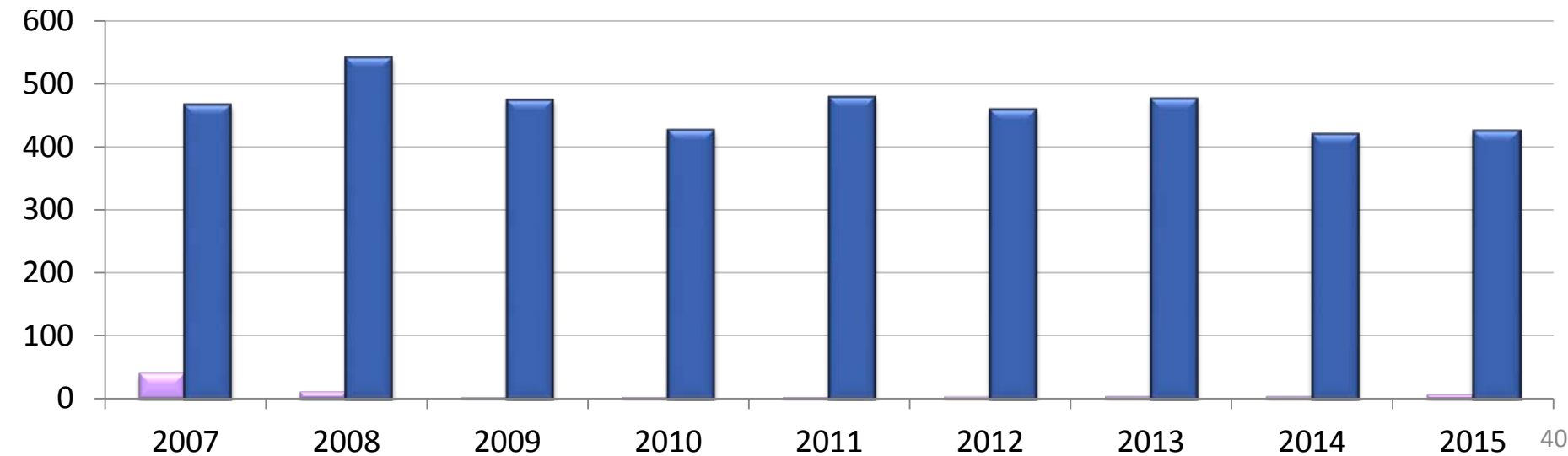
Tyre Import / export with GCC

Source: Eurostat/000 units

Cars and light truck tyres



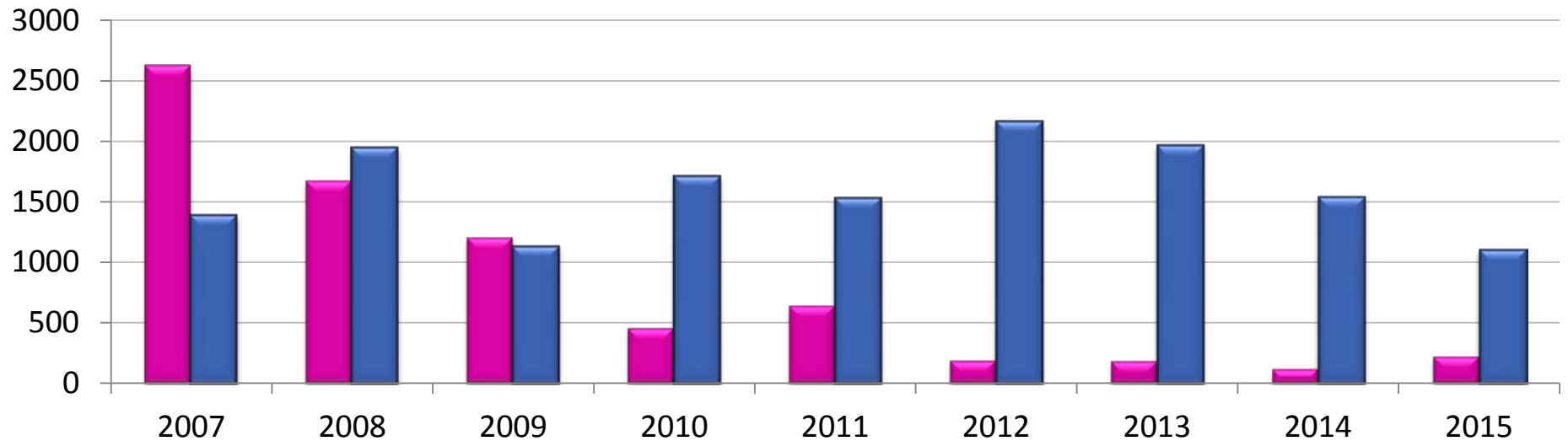
Truck and bus tyres



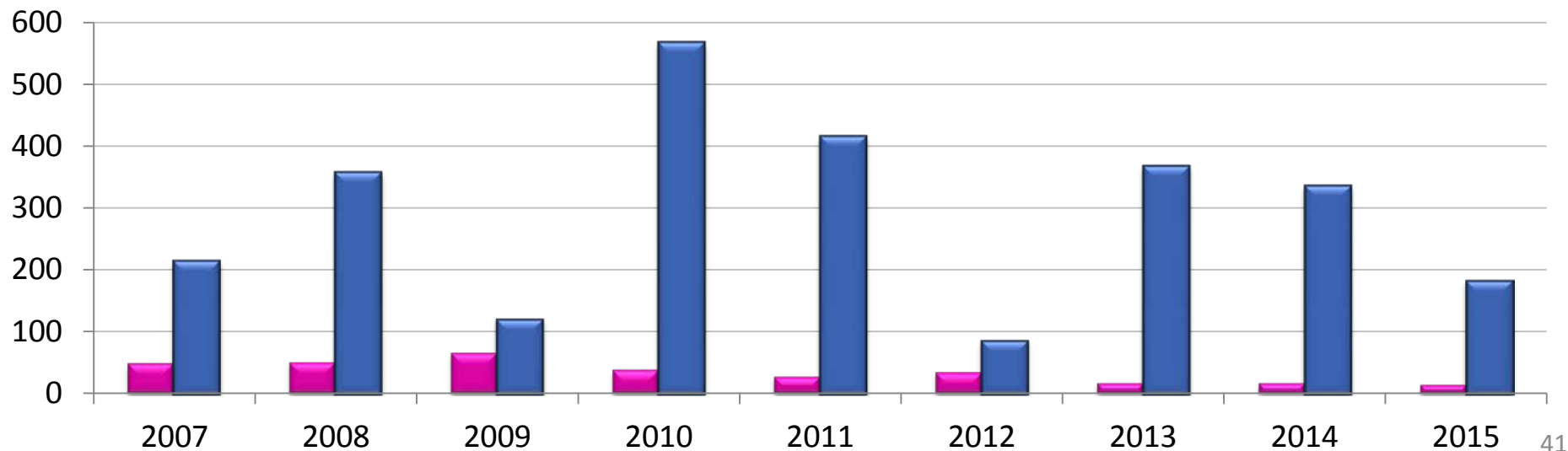
Tyre Import / export with Mercosur

Source: Eurostat/000 units

Cars and light truck tyres



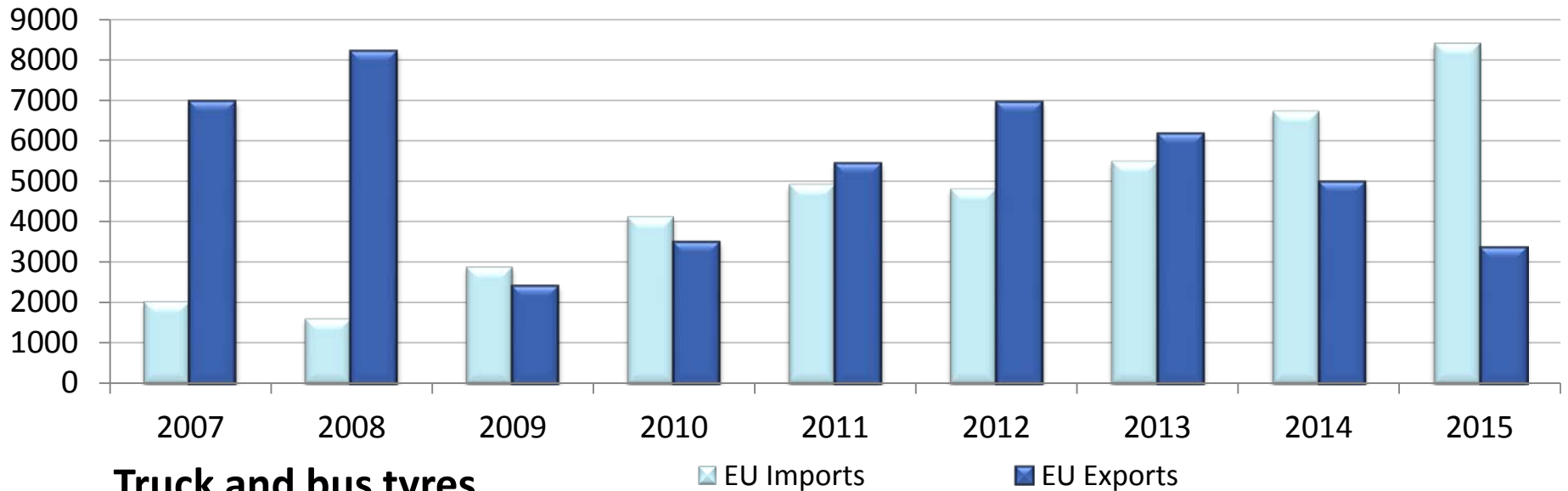
Truck and bus tyres



Tyre Import / export with Russia

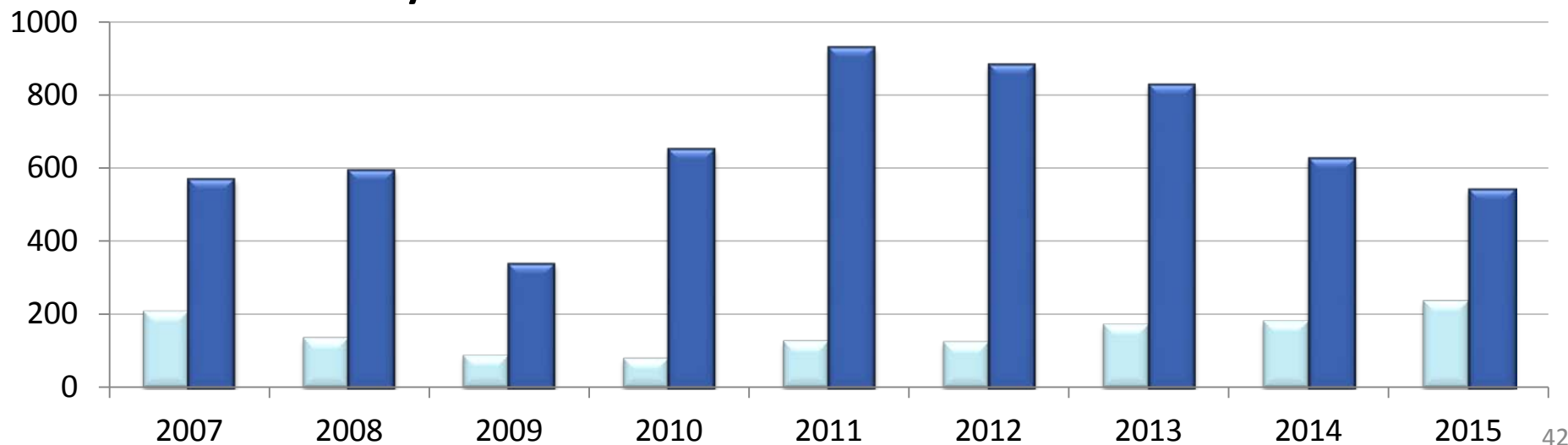
Source: Eurostat/000 units

Cars and light truck tyres



Truck and bus tyres

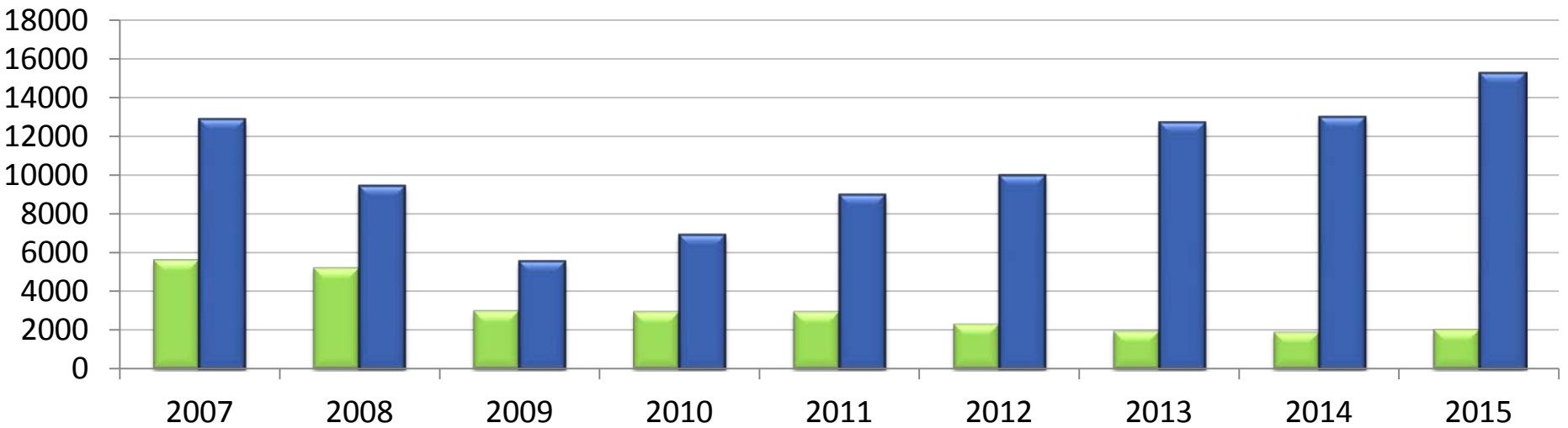
Legend: EU Imports (light blue), EU Exports (dark blue)



Tyre Import / export with US

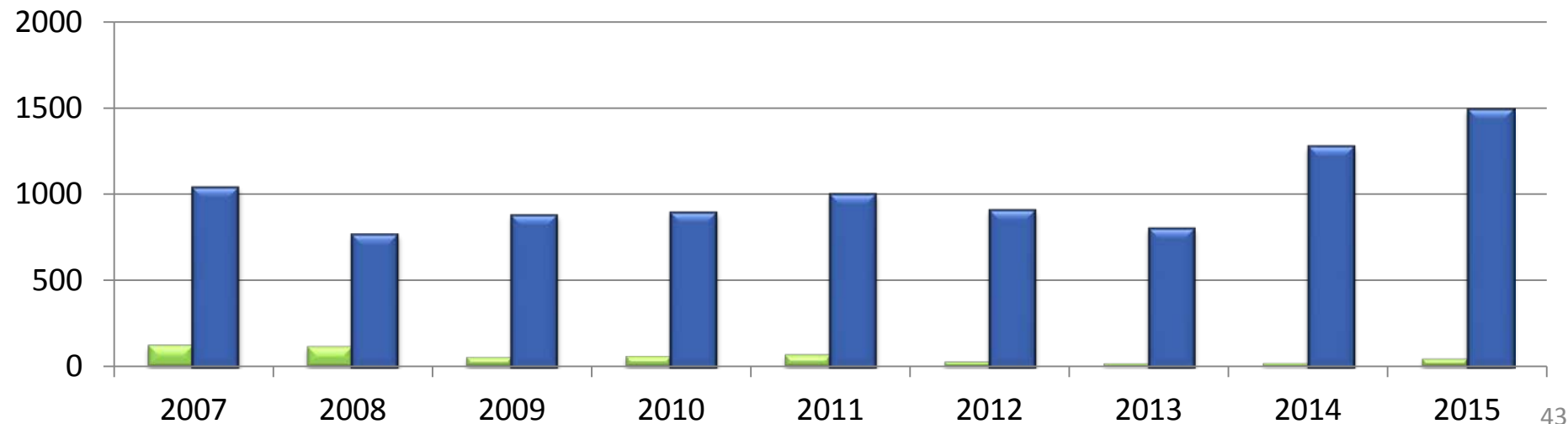
Source: Eurostat/000 units

Cars and light truck tyres



Truck and bus tyres

■ EU Imports ■ EU Exports



RUBBER

ETRMA

2014/2015 Key Figures

VEHICLE DATA from 2008 to 2015 and beyond

GENERAL RUBBER GOODS Production and Trade

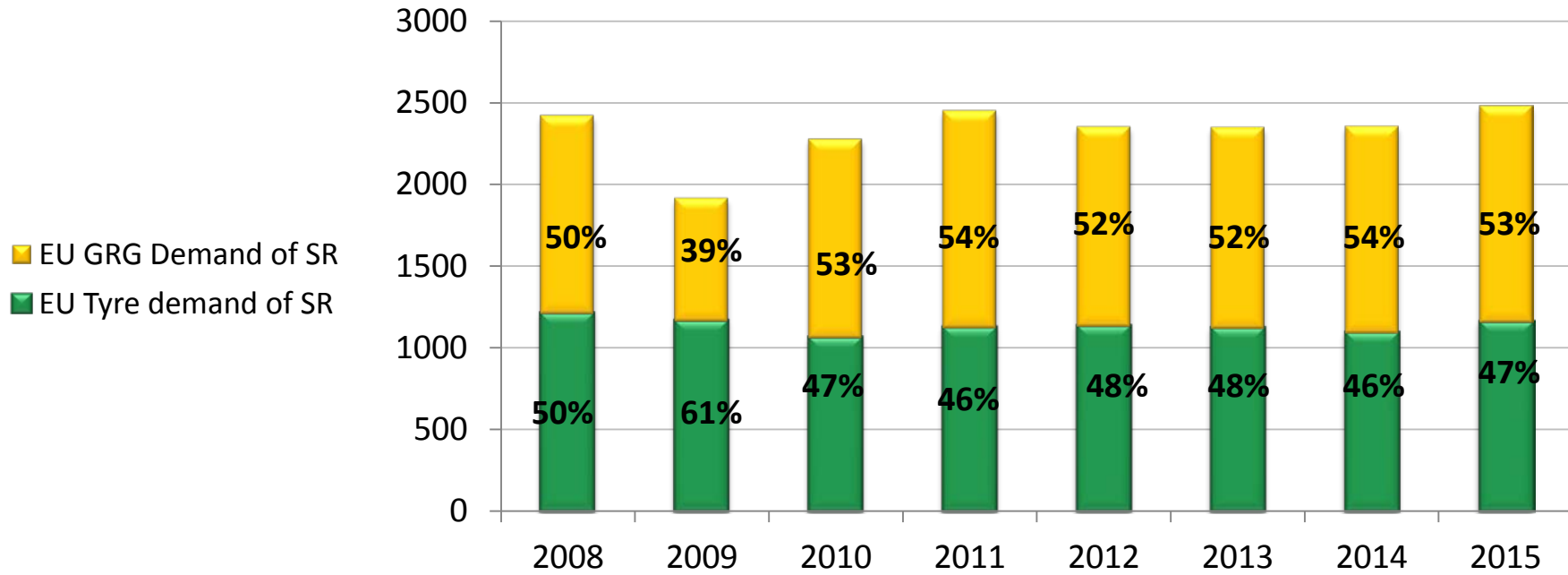
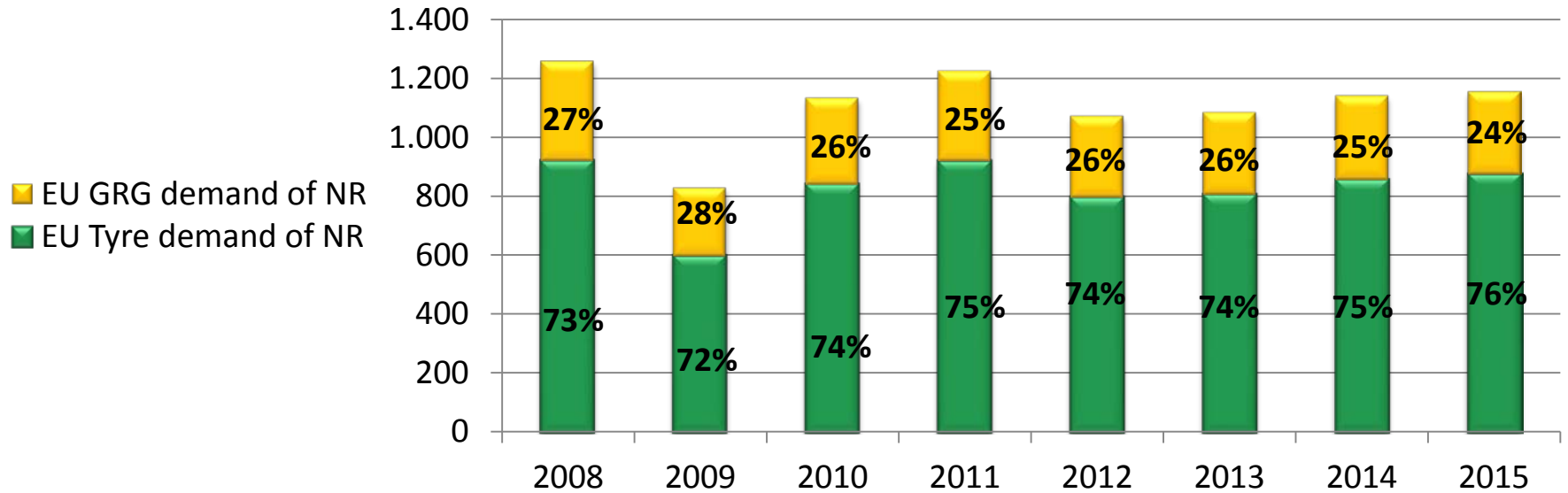
TYRES: Production, New and Retread Sales, Trade and End of Life

RUBBER

Appendix: Export and Import Tariffs

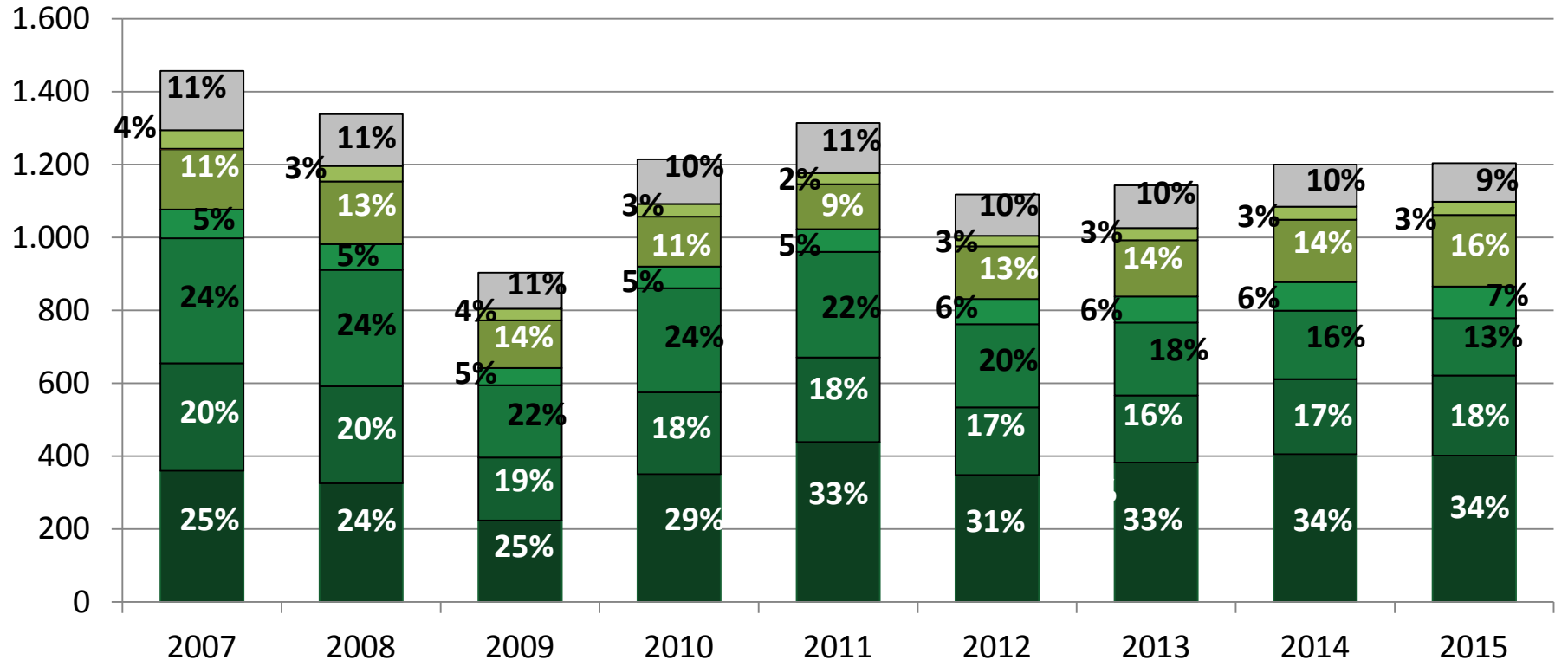
EU Total and breakdown of consumption of rubber

Source: IRSG /000 tonnes



Natural rubber export to EU from key countries

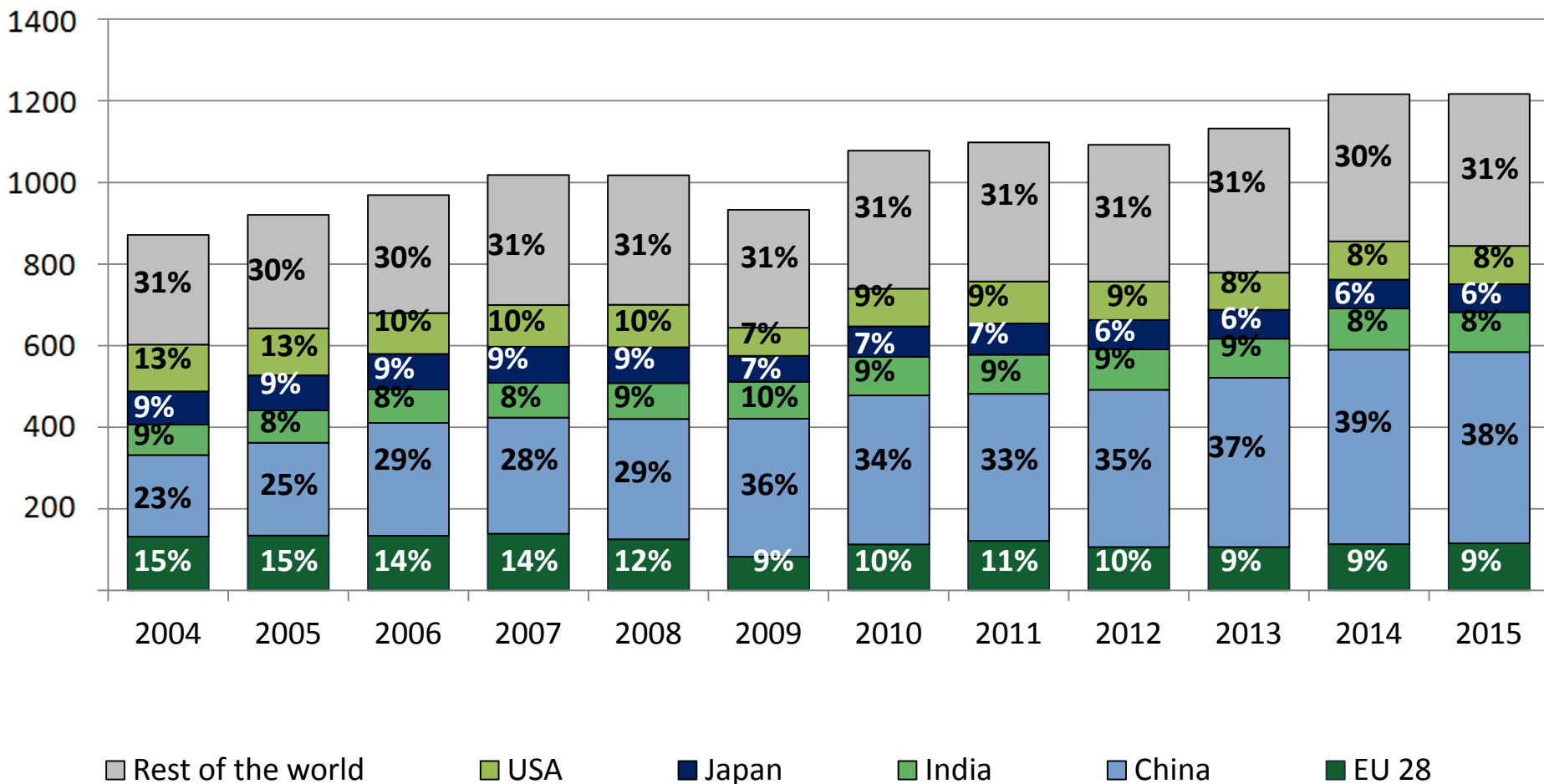
Source: Eurostat/ 000 tonnes



Rest of the world CAMEROON COTE D'IVOIRE VIETNAM MALAYSIA THAILAND INDONESIA

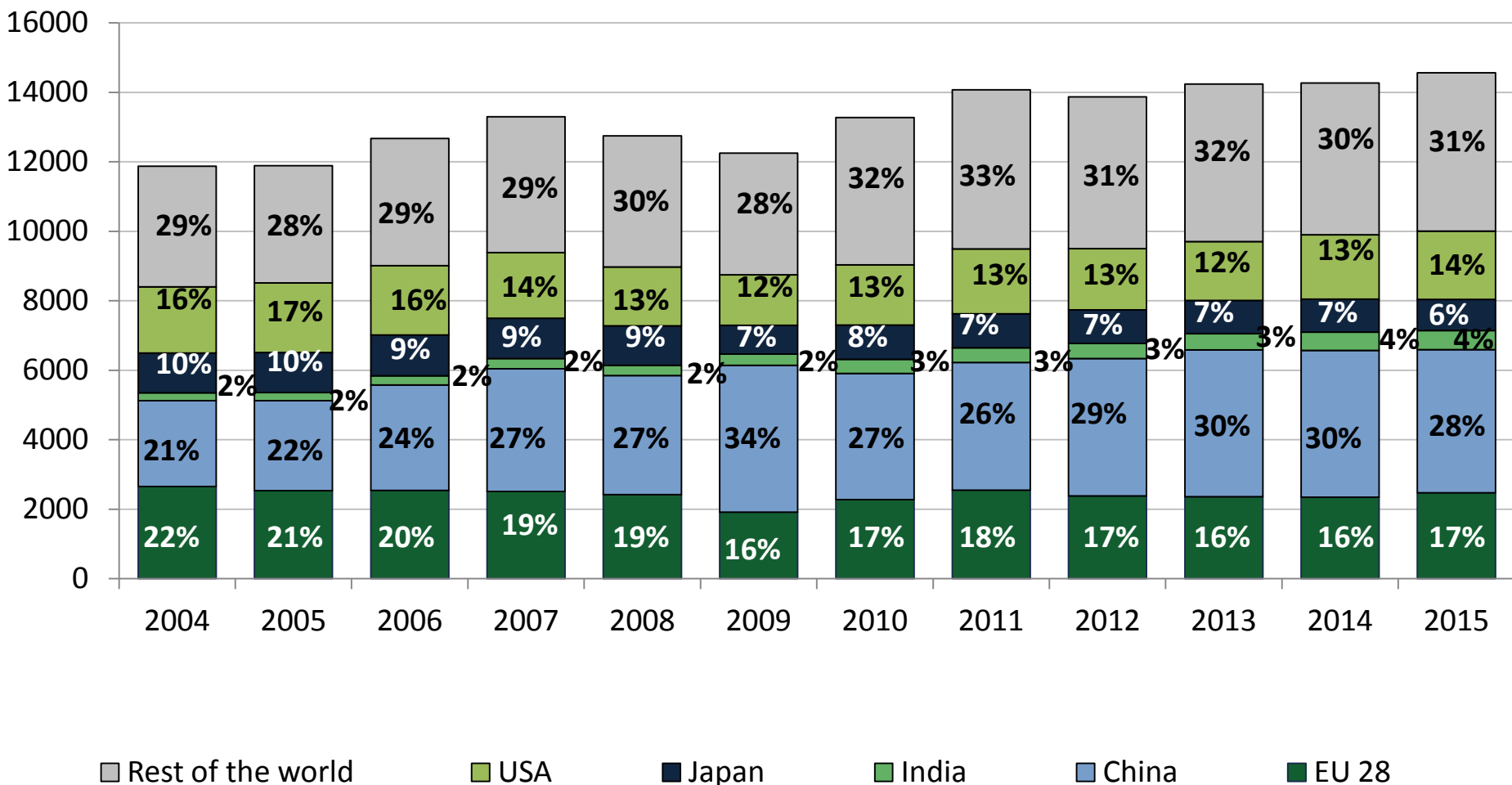
Natural rubber consumption in key countries

Source: IRSG/000 tonnes



Synthetic rubber consumption in key countries

Source: IRSG/000 tonnes



Appendix: Export and Import Tariffs

ETRMA

2014/2015 Key Figures

VEHICLE DATA from 2008 to 2015 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	8-10%	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%	0-6.5%	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 ²	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

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%	0-10%	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 ²	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

² GSP+



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