Tire Manufacturing

Description: Brief Excerpt from Industry Overview Chapter:

Companies in this industry manufacture tires and inner tubes for a variety of vehicles. Major companies include Goodyear and Cooper (US), Michelin (France), Bridgestone Corporation and Sumitomo Rubber Industries (Japan), Continental AG (Germany), Pirelli (Italy), and Hankook (South Korea).

Worldwide tire sales are forecast to grow 7% annually to reach a value of about $260 billion by 2019, according to the Freedonia Group. In addition to the US, France, Japan, China, and Germany are major sources of tire production. The industry is dominated by large players that typically have manufacturing operations in multiple markets around the world.

The US tire manufacturing industry consists of about 110 establishments (single-location companies and units of multi-location companies) with combined annual revenue of about $20 billion.

Competitive Landscape

Demand is driven by sales of new vehicles and the need for replacement tires. Because tires are largely a commodity, profitability depends on cost-efficient operations. Large companies can afford the research to develop tires from new, technologically advanced materials and can invest in improving production efficiency. Small companies can compete by producing tires or tire-related products for niche markets, such as bicycles or farm equipment. The US industry is highly concentrated: the top four companies generate more than 70% of revenue.

Products, Operations & Technology

Major products are tires for passenger cars (about 45% of industry revenue); trucks and buses (30%); and tractor, farm and industrial vehicles (5%).

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