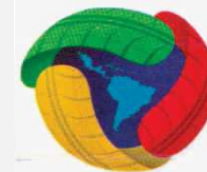


THE TIRE COLOGNE 2018

TYRE Retreading Latin AMERICA



Recent figures and developments

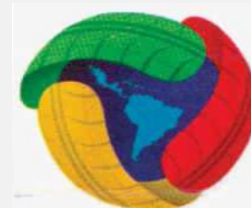


by
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DE RENOVADORES DE NEUMATICOS



Who`s ALARNEU?

Latin American Tyre Retreading Association



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ASOCIACION LATINOAMERICANA
DE RENOVADORES DE NEUMATICOS



Your speaker ... **Leandro Rigon**

Finance Director at **ALARNEU**

International Business Director at **VIPAL RUBBER**



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a bit of history

- **Evidences of retreading activity from the 30s' in Argentina and Brazil (hot cure PCT & LT)**
- **Company profile - family business**
- **Back in time many imports from Europe**
- **80s' – cold cure migration**

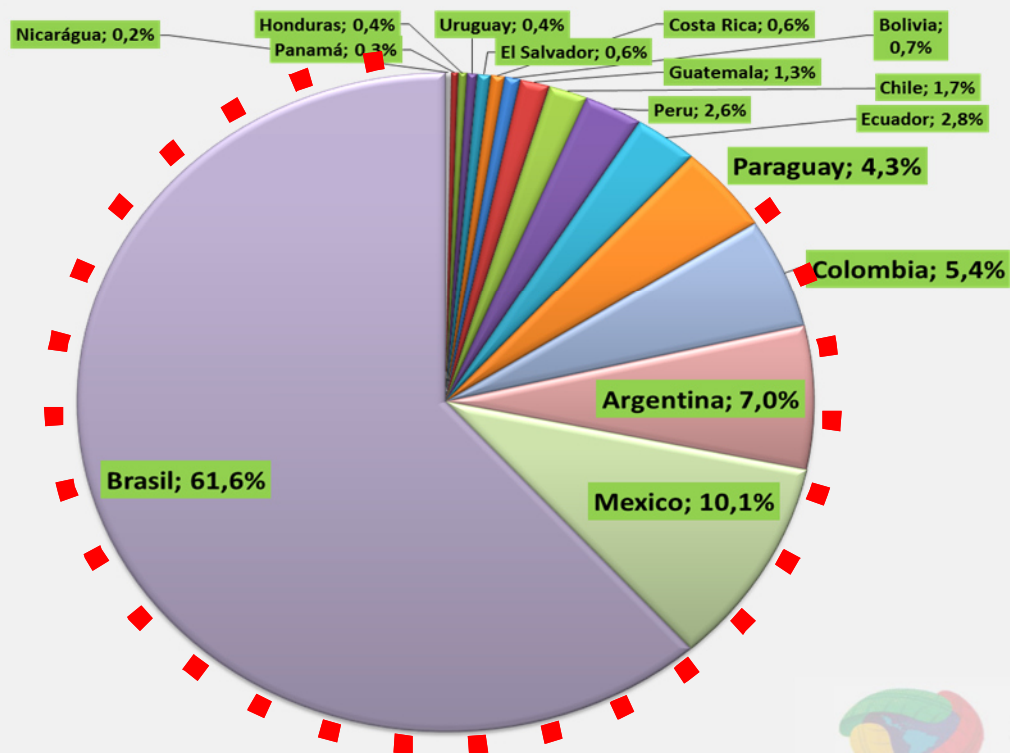


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share

85%



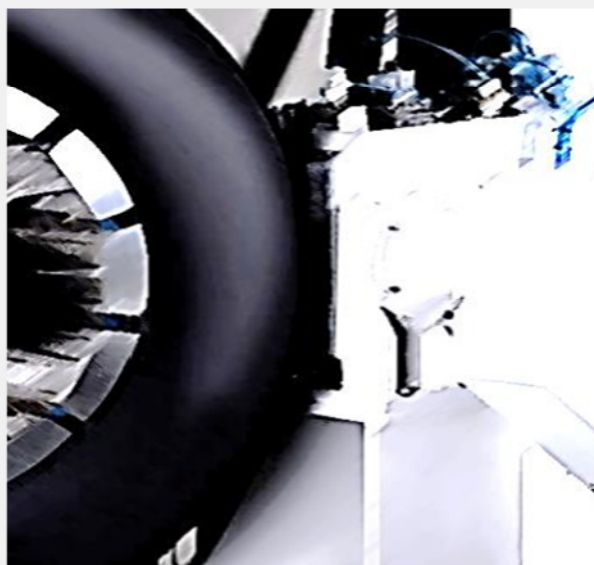
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2017 figures

RETREADING PRODUCTION

- 11.7 M – commercial tyres
 - 5 M - small tyres
 - 530 K - OTR tyres
 - 2040 shops
- Retreadability LATAM -
from 0.20 to 1.80





threats

- Indiscriminate and uncontrolled imports of cheap tyres
- Direct sales from factories in China to fleets
- Tyre prices at end user very close to retreads (120% aver.)

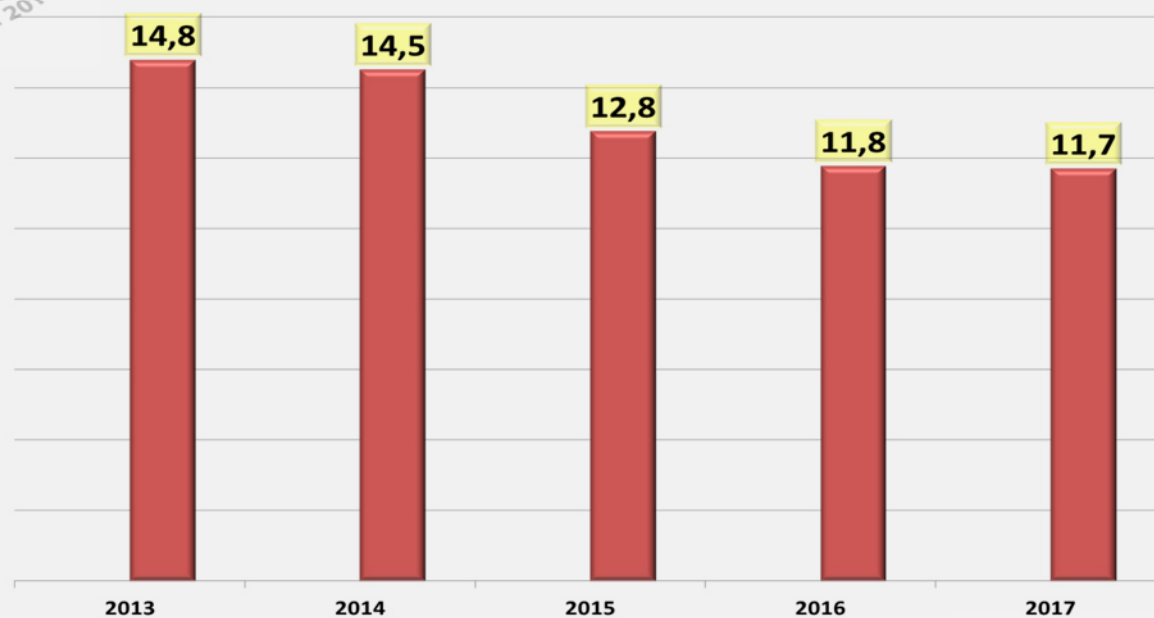


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coml. tyres five years

Million tyres - Y



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import certifications and/or compliance barriers

- **Antidumping and countervailing duties**
- **Certifications by local authorities**
- **Supplier facilities inspection and product homologation**
- **Import ban for used and retreaded tyres**



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retreading certifications

- **Retreading shops**
 - Regulative procedures such as factory inspections, product verifications, fatigue test...
- **Material suppliers**
 - Product certification by local governmental testing institutes – cushion gum



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mandatory

- **ARGENTINA** – Tyres to be followed from beginning to the final disposition through retreading. Nowadays retreading is second priority after any kind of re-use.



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mandatory

- **BRAZIL** – Local industry and importers are required to collect all end of life tyres and give it a final disposition (ruled by the local environmental institute).
- Yet, if the tyre can be reused it should follow the retreading program, before.
- Green Label – considered as green product by the Brazilian Technical Standards Association (ABNT)



mandatory

- **CHILE** – Work in progress with government for end of life tyres program
- LEY REP – Agreement for “clean production” between ARNEC and the Chilean Sustainability and Climate Change Agency.
- Carbon foot print study



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mandatory

- **COLOMBIA**
- Retreading is first option at the disposition program
- Updating the technical regulations for retreads. Green label also will be available.



mandatory

- **COSTA RICA** – comprehensive waste management law, defining final disposition for end of life tyres.
- Import ban for used and retreaded tyres



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mandatory

- **ECUADOR** - tyre import companies are subjected to a retreading plan.
60% from all imports must be retreaded.



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mandatory

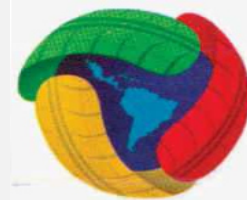
- **URUGUAY** – All imports to be enrolled in an end of life disposition plan thought retreading.



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GRACIAS! OBRIGADO!



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