

# Global Tire Intelligence report

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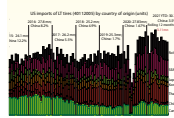
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## About this publication

This document has been prepared in response to demands from the global tire community for insight into all aspects of the global tire industry value chain.

As the tire industry transforms, increasing numbers of people in the tire industry do not have a multi-decade history in this business. This report is for them, and for the more experienced.

Everything in the report is completely independent. All our revenue comes from subscriptions. Our only loyalty is to the readers. So we have to offer reliable and insightful analysis.



**About the author.** This report is compiled by David Shaw. David publishes widely on his own website and LinkedIn about the tire industry. He has a 30-year track record reporting on the global tire industry at the highest levels. He publishes influential newsletters; offers a weekly news service and manages conferences globally.

For more information see <http://TireIndustryResearch.com>

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## Tire makers' data platform

### GDSO seeks to standardise data sharing in tires



The Global Data Services Organisation (GDSO) has launched its Tire Information Service to help stakeholders in the tire industry gain rapid access to data on specific tires. Initially that is through the Tire Information Service (TIS), but other Apps and use-cases are being developed and rolled out.

Founded in January 2022, GDSO is initially launched in the tire segment, but hopes to extend its platform and services to other types of component within the automotive industry.

Currently, the non-profit GDSO is on a mission to become the standard platform for data sharing throughout the tire ecosystem.

Its five founder members – Bridgestone, Continental, Goodyear, Michelin and Pirelli – are committed to using the platform and its data formats as the key to sharing their internal data – held exclusively on their own internal servers – with customers and other stakeholders around the industry.

The benefit to fleets, customers and others is that they will only need one set of protocols and one type of App to gain access to data from all suppliers that use the GDSO formats.

The benefit to tire makers is that they can make it easier for their customers, by using a standardised set of protocols.

And also, as cars and tires become more connected, the tire makers can start to develop real-time tire condition applications that monitor tire condition and alert drivers and fleet managers to potential failures well before they actually occur.

Furthermore, GDSO is in the process of developing support services that will help bring less advanced tire makers up to speed with their digitisation journeys. Which will enable them to become a part of GDSO.

Fundamentally, the more tire suppliers that become a part of GDSO, the easier and cheaper it will be for all stakeholders to access data on each specific tire.

The primary limitation is that each tire will have to have a unique item identifier (UII) that complies with the SGTIN-96 standard. Currently, that can only be implemented by RFID tags. However, should a different system become available in the



future, that will be an alternative to a RFID tag. The requirement is only that each tire can be identified using a SGTIN-96 compliant UII. The technology to store and transmit that to a suitable reader is not part of the TIS specification.

Thus, one of the top priorities for the GDSO is to, “create a critical mass around this Tire Information Service.” Said Riccardo Giovannotti, Secretary-General of the GDSO at our 34<sup>th</sup> Webinar held on 19 July.

He said those who join early will get the chance to formulate how the programme works, by setting the programme for the earliest years of the organisation and how it is applied in different regions of the world.

Giovannotti said, “Cooperation is key in the digital era. It’s meaningless to work alone and one company only trying to solve an issue for all the industries.” While some people use those words and don’t really mean them, Giovannotti made it clear that the world of data and especially data transfer requires common systems that are specifically designed to be used with a variety of different participants.

We have all owned electronic devices that have a proprietary charging port, or run their own proprietary operating system. They are a pain. Now that most have become standardised, it is easier to share files and data across a network.

The same applies in the world of tire data.

The idea is that the GDSO platform will be the primary means of exchanging data throughout the tire ecosystem, making it easier and simpler for everyone involved in that ecosystem.

Before that can happen, there needs to be this critical mass of tire makers who are committed to the platform.

While the five founders represent around 45% of global tire industry turnover, it is significantly less than that in terms of the number of tires made and sold – especially into the replacement market.

This is why the GDSO is working hard to bring in other tire makers, and says that it is in deep discussions with a significant number of those tire makers. If all those come in, then the membership will represent over half of global tire sales and approaching that share of the replacement market.

### Truck tires likely to be first use case

Given that the only way (currently) of associating a SGTIN-96 code with a tire is through an RFID tag, and that RFID tags are becoming standard in truck tires, but are still not common in car tires, it is very likely that the first use-case for the GDSO platform is likely to be in truck and trailer tires.

This, however, is not within the control of the GDSO.

It is the individual decision of each member-user how they use the platform.

Giovannotti said that without the GDSO, each fleet operator would have to work with each tire supplier to exchange data – Bridgestone, Goodyear, Continental etc., as well as Giti and JK Tire and Westlake (Zhongce). With the GDSO, there is one single App to communicate with any and all of the member companies, but each non-member tire maker would need to set up its own portal to communicate data.

Giovannotti said, “on the same truck you may have four, six tires manufactured by different tire companies and for each of them, the risk for the fleet manager is that he would need one solution for one company, one for another.” If all tire makers were members of the GDSO, there is just a single App that enables the fleet manager to get data instantly on any of the tires.

### Live and real-time demo

Giovannotti performed a check on live data while on the webinar. He had a specific Unique item identifier (UII) and fed that into the system. That UII appears to be just a semi-random string of numbers. There is no way to extract any meaningful data from the UII, except through the GDSO platform. In real life, a user might use an RFID reader to collect the UII and automatically send that code to the GDSO platform.

Once sent, the system automatically identifies the manufacturer of the tire and detects the user’s access privileges. It uses the UII to return to the user all the data that the user is authorised for.

Each user has to sign a B2B agreement with the owner of each database. In most cases, the agreement is the same with each tire maker. However, because each database is owned and operated by each of the different tire makers, there has to be a specific agreement with each database owner.

The amount of information displayed at the user screen is a function of the B2B agreement with each of the GDSO members.

The point, however, is that the user can get full data on any specific tire immediately within fractions of a second. And then a tire from a different (GDSO member) tire maker straight after, without needing to log into different platforms.



## Tire makers' data platform

### Webinar #34: Questions and answers



**Minardi:** I would like to congratulate you and the founders of GDSO because it's a great initiative. Following the example that you shared, is the Unique Item Identifier (UII) already associated with regular tires of all brands, or just the ones of the members of GDSO? How does it work?



**Giovannotti:** We are in a market scale-up for this opportunity right now. The five founding members have definitely got products in their line-ups with these codes. As we said, we are looking for standardised solution, and as of today, the only international standardised solution is RFID.

But we are open also to other technologies. GDSO is technology agnostic. So you may find the tires with RFID, with a UII, because they follow the international standard set by the tire industry, and it may work with the Tire Information Service if the manufacturer is a member of GDSO.

Whenever you find a tire with a UII, you can scan it, use our API, and you can get the information. But for sure, we need the market scale up.

**Minardi:** Did you gain any membership since the launch of the initiative?



**Giovannotti:** We are already in contact with many new members. I cannot provide the names right now, for sure, for privacy reasons. Some of them already applied, and the process for validating their application is running.

So we are expecting that already in 2022, additional members will be visible on our website with their logo, their name.

**Minardi:** What would you say the non-members are losing if they don't join?



**Giovannotti:** Let's go back to this ecosystem. Members have got the opportunity to get involved in a very complex environment where the target is to simplify. Not being members of GDSO means they may have to introduce their own non standardised solution that some market participants may not adopt.

Members get the benefits of Simplification. But on top of that, they can be vocal, they can be those bringing new challenges on

the table of GDSO to be solved – respecting the competition or guidelines for sure. Cooperation is key in the digital era. It's meaningless to work alone.



**Minardi:** Okay, and do the founders or the associated members need to have RFID in their tires to do this? If they're not applying for RFID as a technology, can they do it?



**Giovannotti:** I'd like to split the question into two parts.

A company may only join GDSO once they've got a clear plan in terms of time-line, technology, security and so on, to provide data to the users of the platform.

If they cannot do that, they cannot be part of the entire system. And with regard to the technology, as I said, RFID is not a requirement for us. The requirement is SGTIN-96.

I'm not saying that members cannot join without an RFID solution. It's just that today RFID is the only way to deliver a solution that is that SGINT-96 compliant. If an additional technical solution will be available, and is adopted by the industry, that's fine.

**Minardi:** In what market segments do you see the earliest adoption of this solution?



**Giovannotti:** That's really out of GDSO scope. We don't want to enter into that discussion because it is for individual companies to decide how best to use this platform. Having said that, we do see that fleet management may represent another value and asset because tire manufacturers may want to focus on new services: on prediction and diagnostic models.

And then for example, a fleet manager can have a very quick understanding of the status of their tires and reduce as much as possible the breakdowns and wasted time due to tire failures.

So for sure, we may see commercial application flying very quickly, but it also depends on the evolution of the passenger application. We are seeing more and more a different kind of fleet in sharing mobility in an autonomous vehicle.



**Minardi:** You say before you are a non-profit organisation. So how do you fund the whole activity? Is there a membership or you pay by the use? How does it work?



**Giovannotti:** Being an international non-profit organisation means that we are sustainable from a finance angle, thanks to the membership fees paid by the members. But we know that we have

to find a different solution because GDSO has got as a target to be a long lasting company.

We are already creating new services, for example, that could be sold to some users. The digital discussion has been going on for a long time. But some users may still need some support before joining. GDSO could support them through additional services. But so far our incomes are linked to the membership fees only.



**Minardi:** What is your long term vision? The system and the solution is tested, but you're growing little by little. Five years from now, do you foresee the possibility of once having sensors on the tires make this a much more dynamic tool?



**Giovannotti:** Let's start working and then let's start to run. As you said, it's a matter of standard adoption, and the implementation of the Tire Information Service. That's our first target.

The next target is to have a spread around the world. Then we can assess the local needs in each market. Depending on the inputs of the different local initiatives, we can become 'glocal'. That

means to receive local inputs from members, stakeholders and partners and provide global output.

Over the longer term, we want to integrate our API and our services to different tools, including for example, vehicle manufacturers, or to support legislative and governmental authorities.

In March, the European Commission launched a new package of sustainability activities. Among them was a European digital product passport. The Tire Information Service may play a role in that because we can support the tire manufacturers in Europe to provide this kind of information based on the Tire Information Service platform.



**Shaw:** What about the fleets? So, if I'm a fleet, for example, and I buy some tires from Bridgestone and some from Michelin and some from JK and Apollo and Linglong who are not members, how is my relationship with those various different suppliers affected by their membership or otherwise of GDSO?



**Giovannotti:** The added value for the fleet manager here will be on the technical solution itself. That means that he will have to implement only one standardised API to interact with multiple different members.

So the fleet manager will have to engage Michelin, Continental and the others to get access to

## Tire makers' data platform

some specific information that can be sensitive and that will be subject, as I said, to a B2B agreement.

**Shaw:** to be honest, it's a bit of a mess until you get Apollo and JK and Linglong all involved in the system, is that right?



**Giovannotti:** Correct. But we are having already many conversations with different regions, with different association. We are pretty vocal and we are getting a lot of positive feedback from them. It's a market scale up from a technology standpoint, but also from a Tire Information Service implementation.

I want to be crystal clear, we still have work to do on that. But again, the benefit that the members joining GDSO might get is crystal clear. Many of them are already acknowledging it.



**Shaw:** What's the relationship between a passenger car tire maker and a vehicle maker. Ford, GM, whoever.

At the moment, as I understand it, there exists already a platform from Ford that supports all of its suppliers. Do you expect any kind of change in that relationship through your own platform?



**Giovannotti:** That's very important. We are already having a lot of exchanges with different players, including the vehicle industry in Europe.

And they are excited about the solution itself because it can support their use cases in the manufacturing arena, in the replacement and so on, but also from the type approval standpoint, because very often they have to demonstrate that the proper tire with the proper rolling resistance value is properly fitted on the proper vehicle.

They can still use their own application, But we can also integrate our API and therefore improve their data retrieval based on the same application. We are not going to cannibalise what is already in place. We want to represent a boost; based on a simplified approach and on this application.



**Shaw:** The EU product database has just been launched and I think the US has also got a product database, and I think China is developing one as well. How can this interact with those regulatory product databases? Or is that a completely separate function?

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**Giovannotti:** The EPD (European Product database) is a repository created by the European Commission, it is a very big database, where the manufacturers are required to put the information of all the products that are on the European market.

The Tire Information Service and the EPD database today are not linked to each other. Possibly in the future they could be a part of the revolution.

Because as I said once, the stakeholders could be, for example, the European Commission for the digital Passport, for the EPD itself. Possibly they can integrate this kind of carrier, this Tire Information Service, into their requirements as well. So as of today, there are two different kinds of application and two targets, because the EPD database is, as I said, a repository.

While here in the GDSO with the Tire Information Service, the repository is the tire information databases owned by the manufacturer themselves.



**Shaw:** Okay, so at the moment they're separate, but who knows in the future. But for the time being, no specific plans.



**Minardi:** One last question related to RFID.

Sometime ago, I think it was about two years or so ago, Michelin announced that they were planning to produce every single tire in the world with embedded RFID. And that will enable a lot of future mobility solutions. It's not just about the tire. And today your data, GDSO data, is captured through a hand-held. Can RFID have a way of transmitting the data in a more dynamic way?



**Giovannotti:** As of today, we're looking at this kind of user with a reader, but it could be an automatic system, it could be on the production line; assembly line; the tire with the rim; the wheel on the vehicle.

But also in the future, some antennas readers sit on the vehicle themselves so that in real time, the identification of the tire can be available and prognostic models can be provided by the tire manufacturers jointly with the vehicle manufacturer and so on.

So really it's the starting point, as we said before, to unlock the tire potential and based on which a lot of new services and solution can be provided.



**Minardi:** In my personal view this is a great initiative. David and I talked during these two years running the mobility and tire webinars that the industry needs to step up and work together.

We need to see more collaboration and more maturity in the field. We know everybody is competing with each other, but there are common necessities, common elements that can make the industry evolve.

So I hope you gain scale and have more partners, so one day it will become not only the answer to identification, but the enabler to the future mobility.



**Shaw:** Of course I agree. I remember going back 10-15 years that the industry was trying to standardise on RFID data formats. It just didn't work because each company wanted to have a competitive advantage by promoting their own technology as the standard and blocking the proprietary technologies of their rivals.

It sort of worked itself out, but the industry lost ten years and I think the delays and in-fighting upset a lot of people. It certainly upset the car makers, it upset various other people.

I am absolutely thrilled to bits to see that the companies are coming together now and saying, 'look, we can make this happen faster, we can make it happen better by cooperating, and we'll all gain a share of the bigger cake by cooperating than if each of us fights to get the exclusive technology.'

So congratulations to you, Riccardo. I think you've done a fantastic job.



**Giovannotti:** Thank you. It's not just us, to me, it's the initiative of the founding members. And I'm really supported by a strong and smart board of directors. And really, to sum up, I was trying to list down some takeaway. So GDSO is a global platform really intended to cooperate. The Tire Information Service is really intended to unlock the tire potential.

And at the heart of GDSO, we have innovation services and use cases, for sure. Also, we look for a global ecosystem to tackle the challenging agenda that we have because we acknowledge that we cannot do it by our self alone. And then the last, but not the least, let me remark that the membership are open, so those are interested to have additional information, additional exchanges and to become members.

You can engage with me through cellphone or the website.

<https://gdsso.org/Contact-and-application>