Quarterly Update

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Quarterly Replacement Tyre Market Review Q3 2025

Markets were relatively stable in Q3, but remain weak in the year to date

Tyres Europe has published its members' replacement tyre sales figures for the third quarter, and the first three quarters of 2025.

Adam McCarthy, Tyres Europe's Secretary General, said, "Tyre markets were generally stable in the third quarter of 2025, although demand in the Truck & Bus tyre segment remained weak. Data for the first three quarters shows tyre volumes generally lower than the same period in 2024.

In the Consumer segment, sales were flat in the third quarter and are down slightly in the year to date. Demand for car tyres is clearly shifting from summer tyres toward all-season and winter products.

The declines experienced in the Truck & Bus tyre segment during the second quarter continued into the third quarter. Year to date sales are down slightly, reflecting subdued economic activity across the region and an increase in imported tyres.

In the Agricultural tyre category volumes are still far below pre-Covid benchmarks, although they were stable in the quarter."

000s Units	Q2 Change	2024 Q3	2025 Q3	Q3 Change	2024 9M	2025 9M	9M Change
Consumer	-4%	59.220	58.932	0%	170.213	169.333	-1%
~ Car Summer	-9%			-12%			-7%
~ Car All Seasons	-5%			3%			5%
~ Car Winter	9%			5%			6%
Truck & Bus	-5%	3.155	3.015	-4%	8.532	8.414	-1%
Agricultural	-5%	161	162	0%	563	543	-4%
Moto & Scooter	2%	1.849	1.875	1%	7.876	8.198	4%

Discrepancies with data previously published could happen because of periodic data corrections
Consumer = Passenger car, SUVs and light commercial vehicles
Source: EUROPOOL Tyres Europe

About Tyres Europe

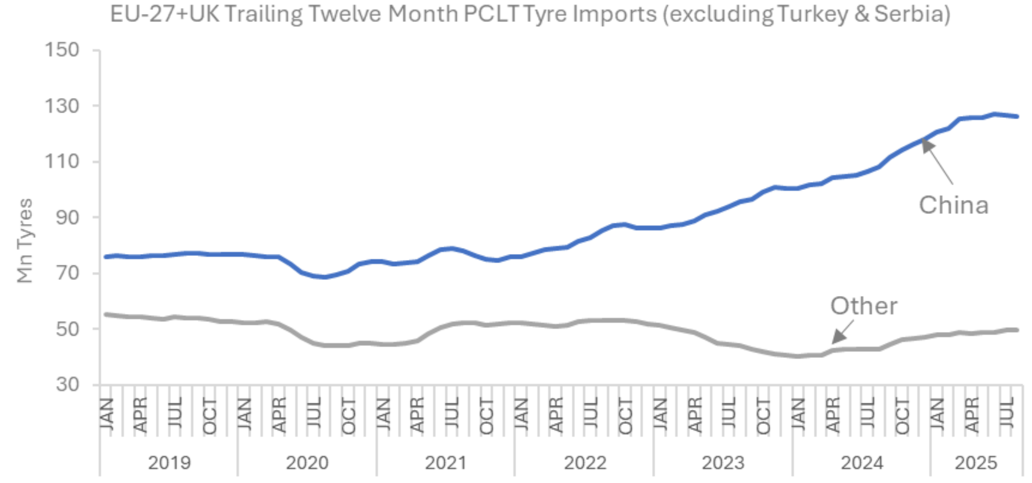
Tyres Europe represents 13 corporate members whose global sales account for 70% of the worldwide tyre market, including 8 of the top 10 industry leaders. Collectively, these manufacturers maintain a robust presence in the European Union (EU) and candidate countries, operating over 70 production facilities and more than 20 R&D centres. In total, the tyre sector supports nearly 500,000 jobs across the EU.

For further information, please contact communications@tyreseurope.org

EU27+UK Tyre Imports

* Data excludes imports from Serbia and Turkey. See note 1 in references, page 4 for more information

The pace of growth in PCLT tyre imports has slowed recently



	Jan-Aug 2025 Mn Units	Y-o-Y Change
Total*	116	10%
	83	11%
	14	-2%
	4	8%
	3	13%
	2	532%

Source: Astutus Research, Eurostat, HMRC

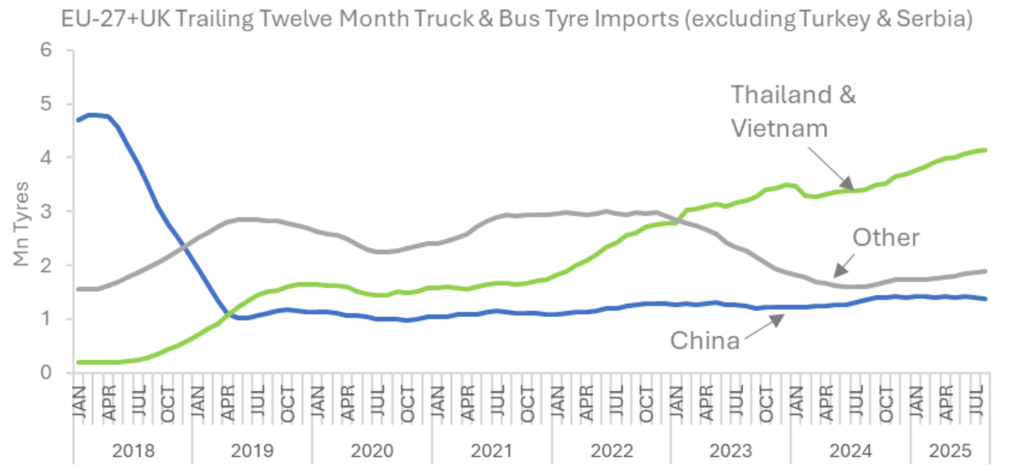
Import volumes of passenger car and light truck (PCLT) tyres into Europe (EU27 plus UK) are up 10% in the first eight months of 2025. The pace of growth has, however, slowed significantly as 2025 has progressed. After increasing by more than a quarter in both Q4 2024 and Q1 2025, the rate of increase fell sharply to just 3% in the following five months. Whilst China remains clearly dominant as a source of imports, and represents over 70% of volumes, in line with the market the pace of growth has slowed significantly in recent months. Although from a low base, imports from Vietnam are up six-fold year on year, now surpassing volumes from India.

Truck & Bus tyre imports from Vietnam continue to advance in 2025

Mn Units	Jan - Aug 2019	Jan - Aug 2025
Total*	3.8	4.8
Thailand	0.8	1.4
Vietnam	0.3	1.2
	1.1	2.6
China	0.8	0.9
Korea	0.7	0.3
Egypt	0.2	0.3

* Excludes tyres from Serbia & Turkey

Totals may not add due to rounding

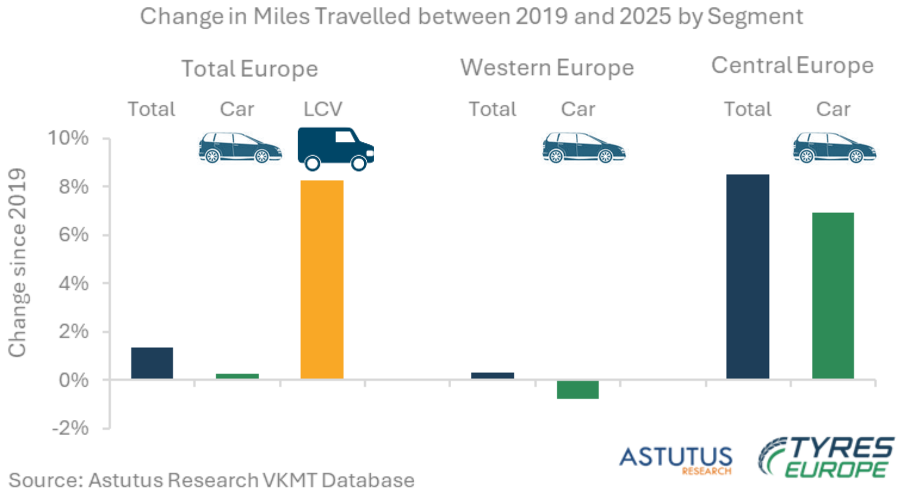


Source: Astutus Research, Eurostat, HMRC

Truck and bus (TBR) tyre imports (EU27+UK) from outside Europe rose by almost 14% in the first eight months of 2025. Tyres from Thailand and Vietnam accounted for a combined 55% of import volumes, up from a 52% share in the same period of 2024. China lost some share in the first eight months of 2025; having been surpassed by Vietnam it is now in third place amongst importers. Korea became the fourth largest importer, ahead of Egypt, with units increasing by almost 50%; nevertheless, import volumes and share remain significantly below that achieved in 2019.

Mobility and Freight Trends

Recovery in light vehicle mileage varies significantly by segment and region

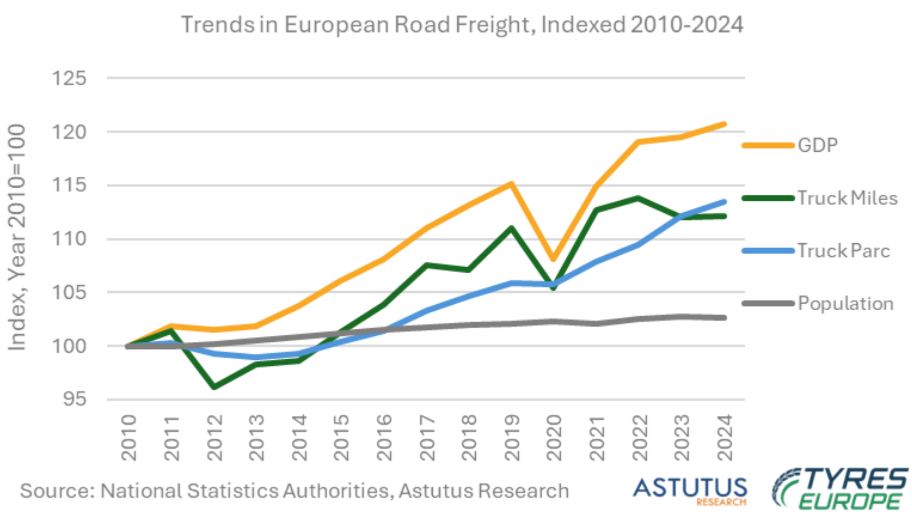


'Total' refers to miles travelled for light vehicles (cars and light commercials)

PCLT tyre replacement is strongly related to aggregate vehicle mileage. Across Europe, miles travelled by light vehicles (cars and light commercials) will finally exceed pre-pandemic levels on an annual basis in 2025. Whilst miles travelled for light commercial vehicles (LCVs) are already significantly above pre-Covid levels, car traffic will be barely above 2019 volumes by the end of 2025. Regional differences remain and in Western Europe mileage travelled by car is now set to recovery fully in 2026, and in some markets this milestone will only be achieved in 2027 or 2028.

See note 2 in references on page 4

Truck mileage lags growth in real GDP



For trucks, growth in miles travelled is closely correlated with changes in real GDP. However, the VKMT intensity of GDP has declined, especially in Western Europe. This is the result of various factors including the use of larger trucks, more efficient routing, faster growth in economic sectors that require less movement of physical goods and slower growth or declines in manufacturing. There has, however, been a shift towards carriers based in Central Europe 'exporting' their services across the region, resulting in a sharp eastward-shift in growth in the truck parc and truck miles.

See note 3 in references, page 4

Quarterly Update

Sustainability in the Tyre Industry

Harmonised End-of-Waste criteria is a key step to strengthening Europe's tyre recycling market

The European rubber recycling industry is fully prepared to process End-of-Life Tyres (ELTs) generated in Europe, recovering valuable resources and reintegrating them into the value chain as high-performance materials. This can only be achieved by developing markets for ELT derived materials.

Recycling Europe and Tyres Europe call for the development of EU-wide End of Waste (EoW) criteria for the ELT-derived Rubber Waste Stream. The rubber supply chain is ready for the next step in the advancement and uptake of the recycling of ELT-derived materials.

A major and persistent barrier for the tyre recycling industry is the lack of harmonised end-of-waste criteria throughout Europe. The lack of harmonisation creates significant difficulties for the tyre recycling industry and its supply chain, threating the sector's viability

Today, a tyre granule made in Spain may lose its "product" status the moment it crosses into France, because each Member State sets its own End-of-Waste (EoW) criteria to answer the growing need for the raw materials produced by the tyre recycling industry.

EoW criteria for rubber from End-of-Life Tyres (ELTs) would turn today's patchwork into a genuine single market for recycled materials.

- Different national criteria create uncertainty, extra paperwork and delays for operators moving materials across borders.
- A single EU definition and verification approach would enable predictable trade and scale investment, especially for SMEs.

"Standardised End-of-Waste criteria will boost demand for high-quality secondary raw materials and reduce dependence on virgin resources," said Adam McCarthy, Secretary General of Tyres Europe. "These standards will support the uptake of recycled inputs in tyre manufacturing, thus supporting the objectives of the Ecodesign for Sustainable Products Regulation (ESPR)."

See note 4, below, for link to the Recycling Europe and Tyres Europe joint position paper

References

1) Imports relate to total volume (units) imported by the EU27 plus the UK from outside 'greater Europe'. For this analysis imports from Serbia and Turkey are therefore excluded.
PCLT = Sum of HS Codes 40111000 & 40112010; Truck & Bus – HS Code 40112090
2) Data for light vehicle miles travelled relates to the EU27, plus UK, Switzerland, Norway but excludes Bulgaria, Cyprus and Malta.
3) Data relates to trucks with a GVW exceeding 3.5 tonnes. Country coverage is the EU27, plus UK, Switzerland, Norway but excludes Bulgaria, Cyprus and Malta.
4) https://tyreseurope.org/wp-content/uploads/2025/08/ETRMA-and-EuRIC-Joint-Position-on-Harmonised-End-of-Waste-criteria.pdf

About Astutus Research

This Quarterly Update has been prepared for Tyres Europe by Astutus Research, an independent provider of market intelligence focused on the tyre industry, mobility (tyre use) and tyre recovery & recycling.

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