



# Quarterly Update

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## Quarterly Replacement Tyre Market Review Q1 2026

### Replacement consumer tyre market returned to modest growth in Q1 2026

Tyres Europe has published its members' replacement tyre sales figures for the first quarter of 2026. Adam McCarthy, Tyres Europe's Secretary General, said, "European replacement tyre demand showed signs of recovery in Q1 2026, with consumer tyres returning to growth after a weak 2025.

Consumer tyres (passenger car, SUV and light commercial) rose 1% in Q1 2026 vs Q1 2025. However, the recovery was uneven across segments:

- All Season tyres continued their strong momentum, up 5%, as consumers favour their year-round versatility.
- Summer tyres slipped 1%, continuing to lose share to All Season. Winter tyres fell sharply, down 14%, reflecting mild conditions across much of Europe.

In a reversal from recent quarters, members' sales significantly outpaced imports which were impacted by European produced tyres and possible regulatory action. Miles travelled were subdued in the quarter, with the higher fuel prices associated with the conflict in the Middle East impacting from March.

Truck & Bus tyres edged up 1%, helped by a positive development in freight activity and an improvement in business sentiment prior to developments in the Middle East and the uncertainty caused by increased fuel costs.

Agricultural tyres declined 11%, with continued caution in farm investment. Moto & Scooter tyres were more positive, rising 6%."



000s Units	2025 Q1	2026 Q1	Change
<b>Consumer</b>	57.499	58.144	1%
~ Car Summer			-1%
~ Car All Seasons			5%
~ Car Winter			-14%
<b>Truck &amp; Bus</b>	2.638	2.674	1%
<b>Agricultural</b>	114	101	-11%
<b>Moto &amp; Scooter</b>	3.267	3.464	6%

Discrepancies with data previously published can happen because of periodic data corrections

Consumer = Passenger car, SUVs and light commercial vehicles

Source: EUROPOOL Tyres Europe

## About Tyres Europe

Tyres Europe represents 14 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](mailto:communications@tyreseurope.org)

## Passenger Mobility Trends

Middle East conflict will impact car miles driven beyond the end of hostilities

### Impact on miles driven



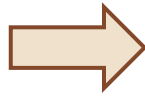
Increased fuel prices



Higher general inflation (particularly home energy costs) & higher interest rates



Fuel shortages



### Impact on tyre replacement



Fewer miles driven



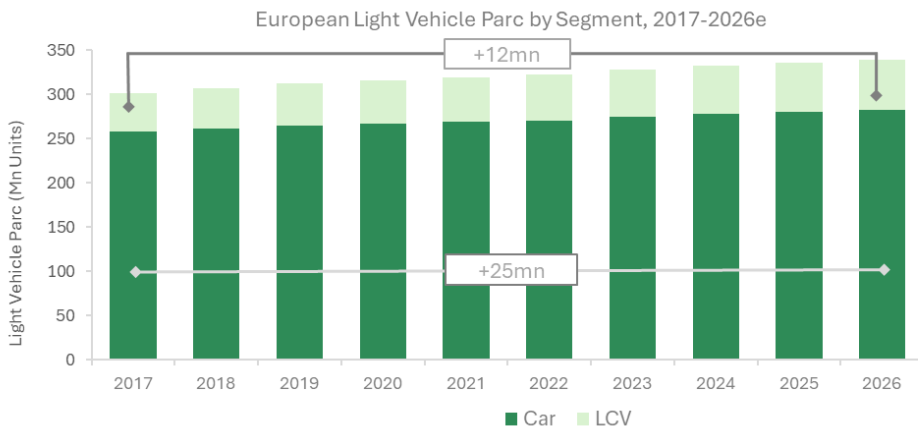
More miles between replacement

The Middle East conflict will continue to impact European miles driven through several channels, including elevated fuel prices and broader macroeconomic pressure from higher general inflation and the threat of rising interest rates. Fuel shortages have so far been avoided, but whilst Europe is a net exporter of petrol, it does rely heavily on imports of diesel (particularly from the Middle East and the US), having lost Russian supply following sanctions.

Critically, the impact on miles driven will outlast the conflict itself. Futures contracts point to a peak impact on oil prices this quarter, with an easing of pressure through to Q4, but with a lingering impact into 2027. Embedded inflation and residual supply-chain disruption will continue to weigh on the economy and therefore motorists. For the European tyre industry, this translates into a headwind for replacement tyre demand: fewer miles driven impacts replacement intervals and during periods of economic distress motorists tend to further extend the number of miles driven between replacement.

Seasonality is also important to the aggregate impact, with a higher share of discretionary mileage during the peak summer driving season. Disruption during the early part of the year therefore has less impact on the aggregate annual result.

## European light vehicle parc to reach 340 million units in 2026



The European light vehicle parc is expected to reach almost 340 million units in 2026, up 12% from just over 300 million a decade ago. Growth has been led by LCVs, expanding 28% versus 10% for passenger cars. Although new car registrations in 2025 remained 2.5 million below the total achieved in 2019, this was partially offset by lower vehicle scrappage, continuing the trend seen in the post-pandemic period.

For geographic scope see note 1 in references, page 4

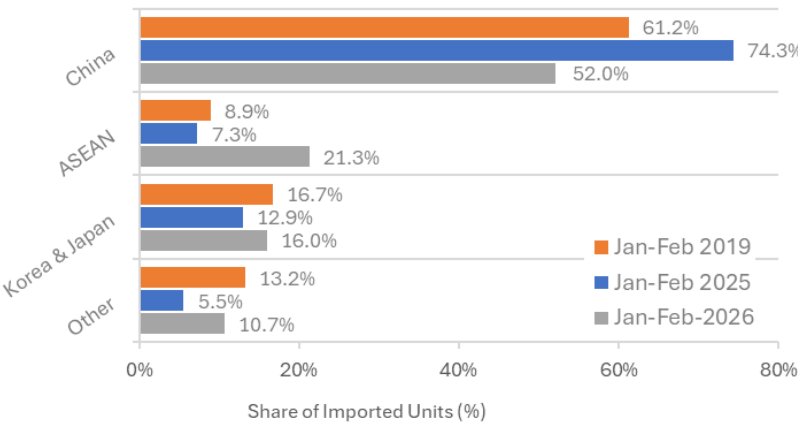
## EU27+UK Tyre Imports

\* Data excludes imports from Serbia and Turkey. See note 2 in references, page 4 for more information

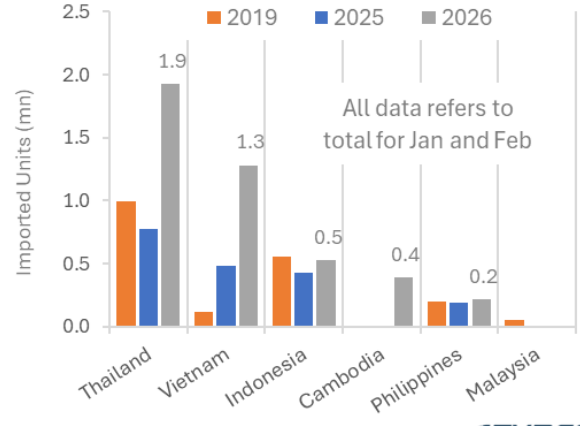
### Jan–Feb 2026 imports down 21.6% as China almost halved; ASEAN share tripled



Share of EU27+UK PCLT Tyre Imports



EU27+UK PCLT Tyre Imports from ASEAN



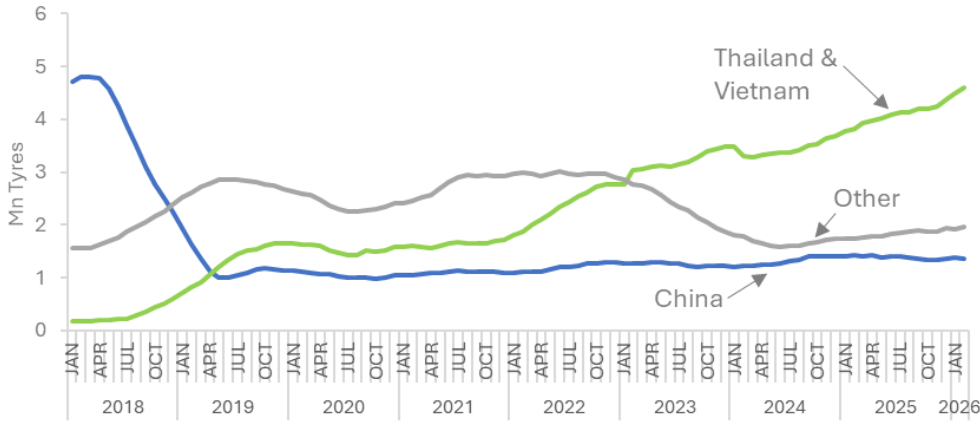
Source: Astutus Research, Eurostat, HMRC



Having increased by 26% in the first quarter of 2025, PCLT tyre imports into Europe (EU27+UK) fell almost 22% in the first two months of 2026. While the total volume of imports declined by 5.6 million units, Chinese-origin tyres fell by 8.7 million units (-45%) and China’s share declined from 74% to 52%. An ongoing EU anti-dumping investigation, with a concern that duties could be back-dated, encouraged significant pre-buying of Chinese PCLT tyres in 2025. These peaked in September 2025 before declining in Q4, with the fall accelerating into 2026. ASEAN-origin tyres (in many cases manufactured by Chinese-owned plants) have subsequently filled much of the gap, lifting their share from 7% of imports to 21% - led by Thailand (+147%) and Vietnam (+165%). Cambodia added 0.4M units from a near-zero base in 2025.

### Thailand and Vietnam continue to drive growth in Europe’s TBR tyre imports

EU-27+UK Trailing Twelve Month Truck & Bus Tyre Imports (excluding Turkey & Serbia)



TBR Import Share	Jan - Feb	
	2025	2026
Thailand	29.6%	33.6%
Vietnam	27.3%	29.9%
<b>Total Thailand &amp; Vietnam</b>	<b>56.9%</b>	<b>63.6%</b>
China	20.2%	16.3%
India	2.8%	5.4%
Egypt	6.4%	5.0%
Korea	4.6%	3.1%

Source: Astutus Research, Eurostat, HMRC



\* Excludes tyres from Serbia & Turkey

Truck and bus (TBR) tyre imports into the EU27+UK from non-European markets rose 24% in the first two months of 2026. Shipments from Thailand and Vietnam grew 39% versus the same period in 2025, lifting their combined share to over 63%. China’s position weakened: with import volumes flat the country’s share declined significantly. India became the fourth largest source, with its share now exceeding 5%. Egypt fell into fifth place, ahead of Korea.

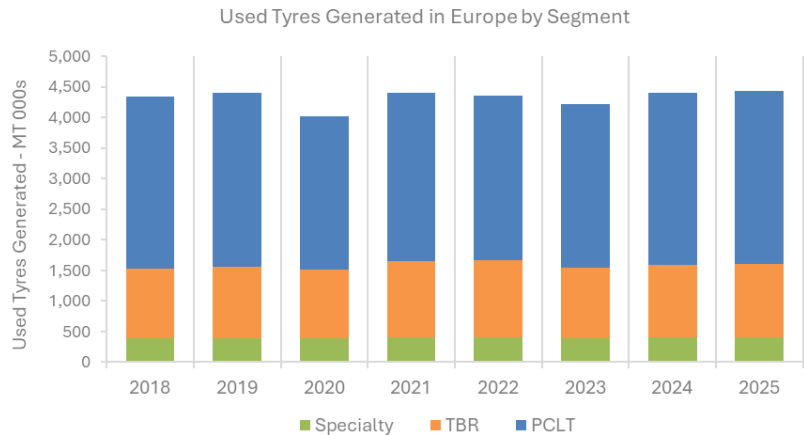
## Sustainability in the Tyre Industry

### Stable used tyre volumes mask diverging trends by sub-segment and geography

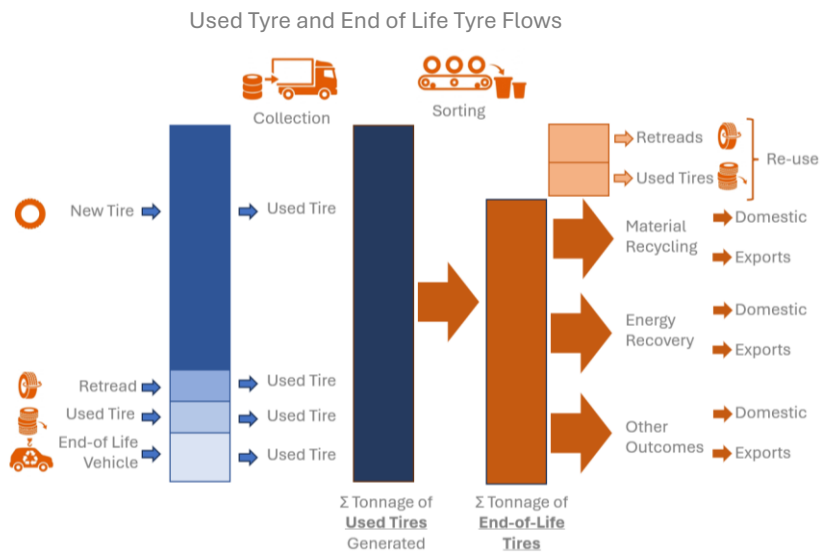
According to preliminary estimates from Astutus Research, Europe generated around 4.4 million tonnes of used tyres in 2025, with volumes essentially flat year on year (+0.5%). This headline stability masks divergent trends across segments and geographies, with Southern European markets (Spain, Portugal and Greece) and some Central European markets growing materially faster, while larger Northern European markets including the UK, Germany and France saw little or no growth.

Replacement tyres account for more than 90% of used tyre tonnage, with the remainder from end-of-life vehicles (ELVs). Of the 4.4 million tonnes generated, around 0.6 million tonnes were reused as part-worn tyres or retreaded.

'Used tyres' refers to all tyres removed from vehicles, whether on replacement or from end-of-life vehicles. 'End-of-life tyres' (ELTs) is the subset net of those reused or retreaded. A decline in retreading has increased the share classified as ELTs, adding to volumes requiring recovery or recycling.



Source: Astutus Research



Note: Data for latest year remains provisional and may be revised

## References

- 1) West Europe includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom; Central Europe includes Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia
  - 2) 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  
 Import volumes are provisional and currently exclude data for Greece in February 2026. This would not impact the overall analysis as the volumes are not material to the total.

## 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.

For further information please contact [info@astutusresearch.com](mailto:info@astutusresearch.com) or visit [www.astutusresearch.com](http://www.astutusresearch.com)