Quarterly Update

In this update:

1. Replacement Tyre Market Review
2. Original Equipment Market; Mobility Trends
3. EU27+UK Tyre Imports
4. Sustainability in the Tyre Industry

Quarterly Replacement Tyre Market Review Q4 2025

Replacement markets were weak in Q4 and for the full year 2025

Tyres Europe has published its members' replacement tyre sales figures for the fourth quarter, and full year 2025. Adam McCarthy, Tyres Europe's Secretary General, said, "European replacement tyre demand remained weak through 2025, with softness across the key segments.

Consumer tyres (passenger car, SUV and light commercial) fell 5% in Q4 2025 vs Q4 2024, ending the full year 2% down. The decline reflects continued macro pressure: low consumer confidence, limited growth in miles travelled and, over the full year, rising import penetration.

- Summer tyres posted the sharpest drop, down 7%, as they continued to lose share to All Season tyres.
- Winter tyres declined 2% for the year. The steep Q4 drop was driven by milder weather, contrasting with Q4 2024 when early heavy snow-fall in parts of Europe boosted demand.

Truck & Bus tyre volumes also weakened: down 2% in Q4 and 4% for FY 2025, consistent with muted freight activity: sales remain sensitive to industrial output which stayed subdued. Again, volumes were also impacted by an increase in imports.

Agricultural tyres were broadly flat in Q4 but finished the year 4% lower, reflecting continued caution in farm investment."

000s Units	2024 Q4	2025 Q4	Q4 Change	2024 12M	2025 12M	Annual Change
Consumer	57.619	54.799	-5%	227.741	224.133	-2%
~ Car Summer			-6%			-7%
~ Car All Seasons			5%			5%
~ Car Winter			-14%			-2%
Truck & Bus	2.924	2.857	-2%	11.456	11.020	-4%
Agricultural	152	145	-5%	715	688	-4%
Moto & Scooter	1.151	1.146	0%	9.027	9.345	4%

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

Original Equipment Tyre Market in 2025

Light vehicle output falls again in 2025; truck & bus original equipment tyre volumes edge up

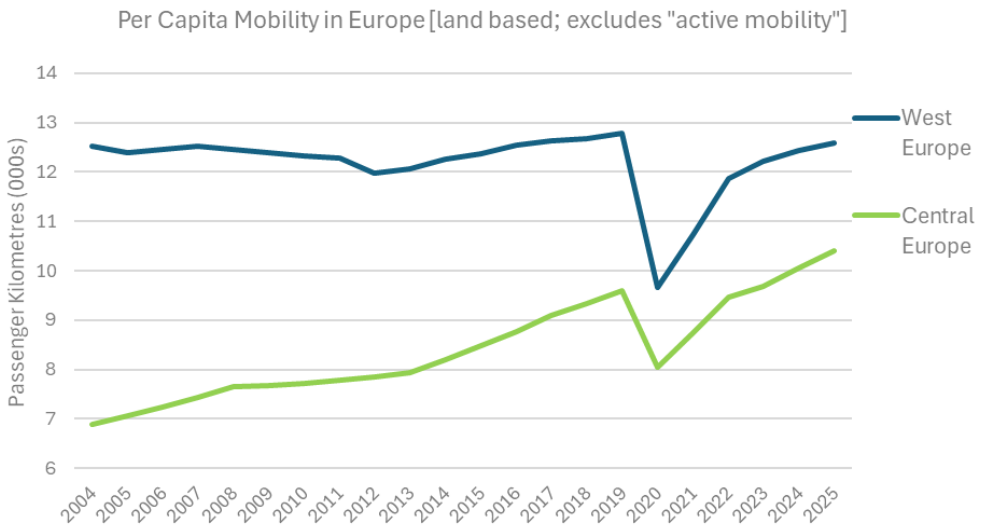
Original Equipment 2025	Full Year Change
Consumer	-3%
Truck & Bus	2%

Soft domestic demand, rising import pressure and weaker exports led to another drop in Europe's light-vehicle production. As a result, members' original-equipment volumes in the consumer segment fell by 3% in 2025.

After a steep decline the previous year, European truck and bus production continued to contract in early 2025 before recovering later in the year. This rebound delivered a modest full-year increase of 2% in original-equipment tyre volumes for the segment.

Mobility Trends in Europe

Per-capita mobility demand returning, but Western Europe still lags



Land based mobility here includes travel by car, train, bus & coach and light rail (tram, metro). Excludes walking and cycling.

Source: Astutus Research, Eurostat, National Sources, Companies

European land-based mobility (car, train, bus, coach and light rail) has largely normalised after the Covid shock and, by late 2025, had returned to pre-pandemic levels.

In Western Europe, per-capita mobility had stayed within a narrow band before 2019. It then recovered steadily from 2021 to 2025, ending close to 12,600 passenger-kilometres (PKM) — broadly matching the 2015–2019 average, though still below the 2019 peak. Central Europe shows a stronger structural rise, climbing from under 7,000 PKM in 2004 to 10,400 in 2025, driven by income growth, increasing car ownership and deeper EU economic integration.

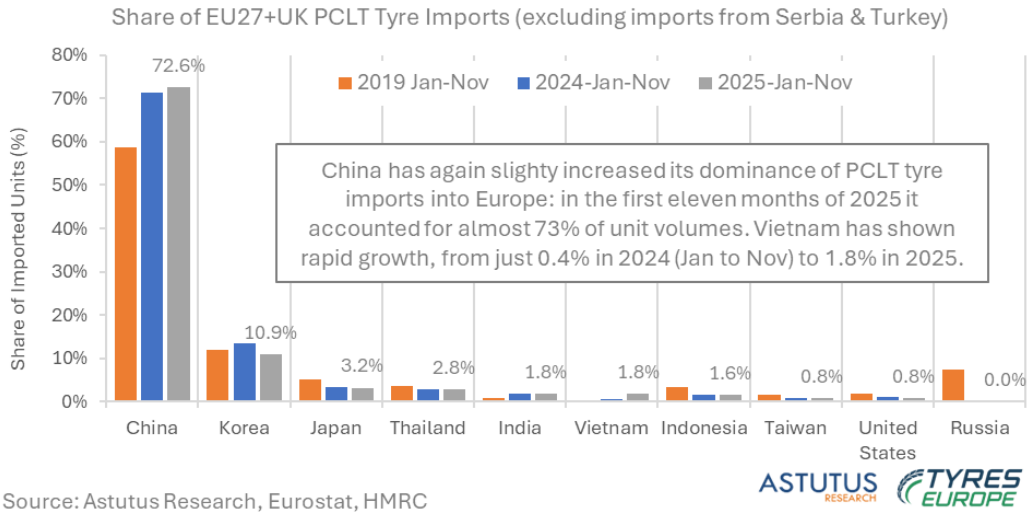
In Western Europe, total mobility demand historically grew because population growth offset flat per-capita trends. Over the forecast period, however, the region's population is expected to decline, with sharp differences between countries. Central Europe will see an even faster population fall. Even so, rising per-capita mobility, supported by higher incomes, is expected to more than compensate, resulting in continued overall demand growth.

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

European PCLT tyre imports slow sharply after early-year surge



Source: Astutus Research, Eurostat, HMRC

Jan-Nov 2025	Mn Units	Y-o-Y Change
Total*	162	5%
	118	7%
	18	-14%
	5	1%
	5	2%
	3	8%

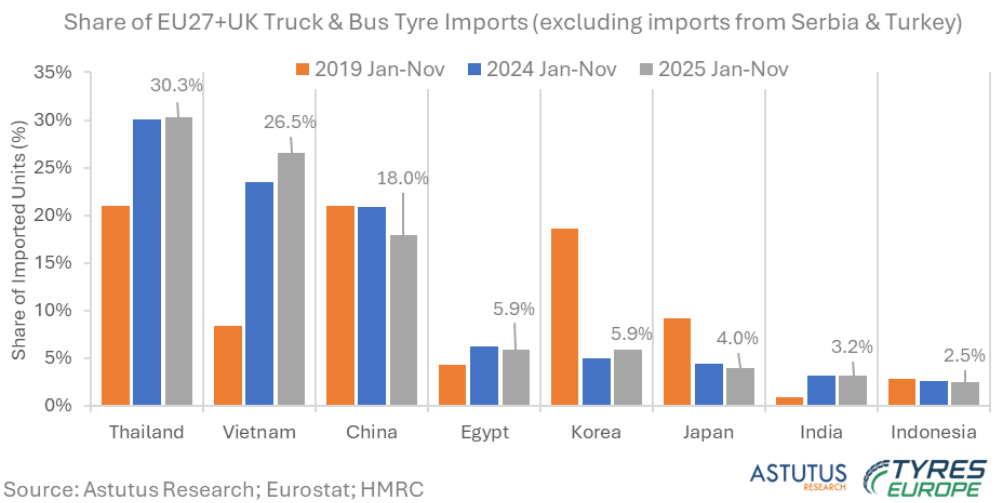
Passenger car and light truck (PCLT) tyre imports into Europe (EU27 plus UK) rose 5% in the year to November 2025, largely driven by a 25% jump in Q1. By Q3, growth had slowed to 1%, and volumes fell 10% in the first two months of Q4. Wholesalers front-loaded Chinese passenger car tyre shipments ahead of anticipated EU tariffs, which made up 76% of imports in September–October. Korea remained the second-largest source, though volumes declined 14% over the eleven months versus 2024. India saw above average growth and ranked fifth, just ahead of Vietnam, which recorded a more than four-fold increase in imports a single year.

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

Mn Units	Jan - Nov 2019	Jan - Nov 2025
Total*	5.2	6.9
Thailand	1.1	2.1
Vietnam	0.4	1.8
	1.5	3.9
China	1.1	1.2
Egypt	0.2	0.4
Korea	1.0	0.4

* Excludes tyres from Serbia & Turkey

Totals may not add due to rounding



Source: Astutus Research; Eurostat; HMRC

Truck and bus (TBR) tyre imports into the EU27+UK from non-European markets rose nearly 10% in the first eleven months of 2025. Shipments from Thailand and Vietnam grew 16% versus the same period in 2024, lifting their combined share to almost 57%. China's position weakened, with import volumes dropping by more than 5%. Egypt remained the fourth-largest source, just ahead of Korea, though its shipments grew only 4%, less than the market. Korean imports jumped almost 30% year on year but remain around 60% lower than in 2019, when the country held an almost 19% share.

TYRES EUROPE

Quarterly Update

Sustainability in the Tyre Industry

Tyre-to-Tyre Recycling & Substitution of Virgin Raw Material

Major manufacturers are committed to increasing the share of recycled and sustainable content in their tyres. This includes tyre to tyre recycling, such as the use of recovered carbon black (rCB) and inputs derived from tyre pyrolysis oil. Other initiatives aim to replace virgin raw materials with recycled or bio-based alternatives from non tyre sources, including chemically recycled PET for tyre cord and rice husk ash as a sustainable silica substitute.

Tyre to Tyre Recycling Moves Towards Scale

Tyre to tyre recycling is now moving beyond the pilot stage as improvements in pyrolysis technology can deliver more consistent, higher quality outputs at industrial scale. rCB has advanced to the point where it is suitable for selected tyre applications without compromising performance. Upgraded pyrolysis oils can now be refined into chemical feedstocks for new synthetic rubber. Europe's high End of Life Tyre (ELT) collection rates provide manufacturers with a reliable supply base to expand circular inputs. As processes mature, integration levels exceeding double digit percentages of total raw materials are becoming feasible, signaling the start of a broader shift toward circular production.

Substituting Virgin Materials Through Broader Sustainable Inputs

Manufacturers are also replacing virgin materials with recycled or bio derived inputs. Chemically recycled PET can be spun into high strength tyre cord with properties comparable to virgin polyester. Rice husk ash offers a lower carbon, renewable source of silica for rolling resistance optimised compounds. These substitutions not only reduce lifecycle emissions but also diversify material options at a time of increasing raw material volatility.

Policy and Market Signals Reinforcing Uptake

EU wide End of Waste criteria could remove cross border barriers for ELT derived materials and give manufacturers greater certainty when scaling recycled content strategies. Regulatory shifts such as the ban on rubber-granulate turf infill, while disruptive in the near term, could redirect recycled rubber toward higher value tyre to tyre applications. At the same time, manufacturers anticipating future recycled content requirements, and responding to stronger customer and regulatory expectations, are investing heavily in product development and deeper supply chain partnerships. The result is growing demand for high quality secondary materials and increasing collaboration across recyclers, compounders, and technology providers as the industry moves toward genuinely scalable circularity.

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

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 or visit www.astutusresearch.com