

Global Tire-derived Fuel (TDF) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tire-derived Fuel (TDF) market size is expected to reach \$ 1356 million by 2032, rising at a market growth of 4.9% CAGR during the forecast period (2026-2032).

In 2025, global Tire-derived Fuel (TDF) production reached approximately 9 million MT, and average price was 100 USD/MT.

Tire-derived Fuel (TDF) refers to shredded or processed end-of-life tires that are converted into a solid alternative fuel for industrial combustion systems such as cement kilns, industrial boilers, and power plants. It is used to partially replace conventional fossil fuels like coal or coke due to its relatively high calorific value and stable combustion characteristics.

TDF is primarily produced through mechanical processing rather than chemical decomposition, making it a form of solid recovered fuel. Its performance in industrial applications depends on factors such as particle size, steel content, and processing quality, which influence combustion efficiency and emissions. With increasing environmental regulations and the development of alternative technologies such as pyrolysis, the role of TDF in the energy recovery hierarchy is gradually evolving.

The gross profit margin for Tire-Derived Fuel (TDF) is remarkably high within the waste recycling and alternative fuel sectors, typically ranging from 30% to 50% globally. The primary driver behind this robust profitability is TDF's unique 'two-way revenue' or 'negative/zero raw material cost' business model. On the input side, TDF processors often receive an upfront 'tipping fee' or 'gate fee' (ranging from dozens of dollars per ton) to accept scrap tires, meaning their core raw material is essentially free or generates revenue before processing even begins. On the output side, because TDF

possesses an exceptionally high calorific value (approx. 7,500 - 8,000 kcal/kg) that rivals or exceeds high-grade coal and petroleum coke, cement kilns and pulp mills are willing to purchase it at a stable premium. The main operational expenditures are concentrated in capital depreciation of heavy-duty shredders, blade wear-and-tear, magnetic steel separation, and logistics. As long as a facility maintains a high capacity utilization rate and manages maintenance costs effectively, TDF yields highly attractive cash flows and strong gross margins.

Tire-derived Fuel (TDF) is one of the most established energy recovery pathways for end-of-life tires, widely used in cement kilns, industrial boilers, and selected power generation systems as a substitute for conventional fossil fuels such as coal. Due to its relatively high calorific value, TDF offers significant cost advantages in energy-intensive industries.

Market growth is driven by three structural forces. First, cement manufacturing remains the primary demand driver, as cement kilns operate at high temperatures that enable efficient combustion of tire-derived fuel. Second, the continuous accumulation of scrap tires globally supports the need for scalable waste-to-energy solutions. Third, tightening environmental regulations and decarbonization policies are encouraging the use of TDF as a transitional alternative fuel within circular economy frameworks.

From a value-chain perspective, the TDF industry consists of tire collection, mechanical processing (shredding and size reduction), and final energy consumption. Value capture is concentrated at the feedstock aggregation stage and at the industrial end-users capable of consistently consuming alternative fuels, particularly cement producers. North America and Europe represent mature markets, while Asia Pacific is the primary growth region due to industrial expansion and large-scale tire generation.

However, the TDF market faces structural limitations. Increasing environmental scrutiny is tightening emission standards related to particulates, sulfur compounds, and heavy metals. At the same time, emerging technologies such as tire pyrolysis and recovered carbon black (rCB) are gradually creating substitution pressure by offering higher-value material outputs. As a result, TDF is increasingly viewed as a transitional rather than end-state solution in tire circularity.

Overall, the TDF market is expected to maintain steady growth in the near to medium term, supported by rigid waste generation and strong demand from the cement industry, while long-term expansion may be constrained by the advancement of chemical recycling technologies.

This report studies the global Tire-derived Fuel (TDF) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tire-derived Fuel (TDF) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Tire-derived Fuel (TDF) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tire-derived Fuel (TDF) total production and demand, 2021-2032, (Kiloton)

Global Tire-derived Fuel (TDF) total production value, 2021-2032, (USD Million)

Global Tire-derived Fuel (TDF) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton), (based on production site)

Global Tire-derived Fuel (TDF) consumption by region & country, CAGR, 2021-2032 & (Kiloton)

U.S. VS China: Tire-derived Fuel (TDF) domestic production, consumption, key domestic manufacturers and share

Global Tire-derived Fuel (TDF) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kiloton)

Global Tire-derived Fuel (TDF) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton)

Global Tire-derived Fuel (TDF) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton)

This report profiles key players in the global Tire-derived Fuel (TDF) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Liberty Tire Recycling, Genan, CRM Rubber, Murfitts Industries, Emanuel Tire, Tire Disposal & Recycling, Entech, Mac's Tire Recyclers, Champlin Tire Recycling, Golden By-Products, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Tire-derived Fuel (TDF) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kiloton) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Tire-derived Fuel (TDF) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tire-derived Fuel (TDF) Market, Segmentation by Type:

Whole Tire TDF

Shredded TDF

Chipped TDF

Granulated TDF

Global Tire-derived Fuel (TDF) Market, Segmentation by Grade:

High-grade TDF

Standard TDF

Low-grade TDF

Global Tire-derived Fuel (TDF) Market, Segmentation by Method:

Mechanical TDF

Enhanced TDF

Global Tire-derived Fuel (TDF) Market, Segmentation by Application:

Cement Kilns

Pulp And Paper Mills

Power Plant

Others

Companies Profiled:

Liberty Tire Recycling

Genan

CRM Rubber

Murfitts Industries

Emanuel Tire

Tire Disposal & Recycling

Entech

Mac's Tire Recyclers

Champlin Tire Recycling

Golden By-Products

L&S Tire

Manhantango Enterprises

Tire Reclaim

Roadside Tire Recycling

Bridgestone

Double Star

ZC Rubber

Key Questions Answered:

1. How big is the global Tire-derived Fuel (TDF) market?
2. What is the demand of the global Tire-derived Fuel (TDF) market?
3. What is the year over year growth of the global Tire-derived Fuel (TDF) market?
4. What is the production and production value of the global Tire-derived Fuel (TDF) market?
5. Who are the key producers in the global Tire-derived Fuel (TDF) market?
6. What are the growth factors driving the market demand?

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