

Europe Tyre Market Assessment, By Tyre Type [Winter Tyres, Summer Tyres, All Season Tyres], By Vehicle Type [Two-Wheelers, Passenger Car, Light Commercial Vehicle, Heavy Commercial Vehicle, Others], By Rim Size [Below 18 inches, Between 18 inches and 24 inches, More than 24 inches], By Demand Type (OEMs, Replacements), By Tyre Construction Type [Radial, Basis], By Distribution Channel [Online; Offline-Original Equipment Manufacturers (OEMs), Distributors and Dealers, Retailers/Local Vendors, Others], By Region, Opportunities, and Forecast, 2018-2032F

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Abstracts

Europe Tyre Market was valued at USD 44.49 Billion in 2024 and will be valued at USD 56.31 billion in 2032 at a subdued CAGR of 2.99% during the forecast period between 2025 and 2032. The year 2022 witnessed contraction in the Europe tyre market due to the structural damage caused to the industry due to the Russia-Ukraine war which led to significant geo-political tensions between the Russia and Other European countries along with their ally, the US. Sanctions against Russia, one of the leading tyre markets in Europe along with soaring energy prices; inflation at record high levels which led to the lower discretionary purchasing power of Europeans. This contributed to the contraction of the European tyre market in 2022 at a time when the market witnessed recovery in 2021; post adverse impact of lockdown to curb COVID-19 in 2020.

While the overall tyre market contracted, increased demand from consumers was witnessed for ultra-high-performance tyres which had high levels of durability and dependability. The demand for car tyres with higher sidewall puncture resistance and high-design cushion for road stress had also led to the market expansion in this segment of tyres. Other factors driving the need for innovative and premium tyres was the higher living standards of wealthier Europeans who were not impacted significantly due to war and they supported growth in luxury vehicles. The demand for crossover utility vehicles (CUVs) and sport utility vehicles (SUVs) also spurred the market expansion for relatively costlier tyres. Additionally, the expanding presence of leading global tyre manufacturing companies such as Continental AG, Michelin, Bridgestone, Goodyear, Pirelli, etc. drove the tyres production in the market.

Growing Consumer Interest Towards Green Mobility

The growing consumer interest towards green mobility is leading to increased adoption of electric vehicles in the European region. Europe promotes electric vehicles to increase the demand and buying of electric vehicles. As a result, there is a higher consumer demand for durable tyres for electric and autonomous vehicles. Additionally, the industry is expanding as result of rising demand for green tyres. Compared to the conventional tyres, green tyres offer better road resistance and are created from biodegradable and renewable materials. These factors will drive growth of Europe Tyre Market during the forecast period.

Demand for Replacement Tyres

Winter and all-weather tyres are required across the continent due to very cold temperatures. Additionally, as a result of the unpredictable weather, tyres need to be replaced on a regular basis and according to the weather. Thus, such factors are promoting the expansion of the tyre market in Europe.

Technological advancements in Tyre Manufacturing

Technological developments are highly driving the European tyre market due to its efficiency and sustainability. Examples include smart tyres, with sensors that measure the real-time pressure, temperature, and wear, improving safety and efficiency. Further, companies are developing tyres made of Guayule rubber, an eco-friendly rubber material, and are adopting 3D printing technology. These developments support the increasing demand for high-performance and eco-friendly tyres while also aligning with the overall pattern of the industry shift into digitalization, enhancing the consumer

experience in totality and gaining market competitiveness.

For instance, in September 2024, Nokian Tyres plc inaugurated the world's first full-scale zero-CO2 emission tire factory in Oradea, Romania. The factory operates without using fossil fuels, utilizing on-site solar power and electric boilers. It aims to produce 6 million tyres annually, focusing on passenger car tyres for the Central European market. This initiative marks a significant step towards sustainable tire manufacturing.

Impact of COVID-19 on Europe Tyre Market

The COVID-19 had a significant adverse impact on the Europe Tyre Market as most of the companies in the market faced various hurdles as a result of the region's governments imposing rigorous mobility restrictions and regular lockdowns to curb the spread of COVID-19. Tyre imports and exports were impacted by travel and cross-border trade restrictions and supply chain delays which resulted in lack of supply for basic materials like rubber thus impacting production. Additionally, since logistics and shipping were also impacted, deliveries of pre-produced tyres were postponed or cancelled, which led to significant contraction of the market.

Post COVID-19 upliftment of social distancing norms in 2021 led to a smart recovery as manufacturers reinitiated their production operations as well as they focused on strengthening their supply chain network which positively influenced import and export trade of tyres in and out of Europe.

Impact of Russia-Ukraine War on Europe Tyre Market

The ongoing Russia-Ukraine war had a significant negative impact on the Europe Tyre Market due to supply chain disruptions, expensive rubber material cost, higher energy cost and inflation thus lowering automobile demand and major demand destruction in the countries engaged in war. Russia is a large source for synthetic rubber and rest of European countries' import it from Russia but due to the war rubber supply from Russia got hampered due to the sanctions imposed against the country. This also resulted in the decline in volumes of tyre sales but increase in prices thus leading to contraction in the Europe Tyre Market.

Key Player Landscape and Outlook

Inorganic growth strategies such as M&A, strategic long-term alliances and collaborations will play a vital role in reaping cost synergies and maximising the revenue

share of tyre companies in Europe. Bridgestone Europe NV/SA, Toyo Tyre Holdings of Europe GmbH, Sumitomo Rubber Industries, Ltd., Michelin Group, Continental Reifen Deutschland GmbH, Goodyear Tyre & Rubber Company, Hankook Tyre & Technology Co., Ltd., Yokohama Rubber Company, Limited, Pirelli & C. S.p.A., Trelleborg AB are some of the key players dominating Europe Tyre Market. Prominent companies expanded their production capacities during the historical period. For instance, The Goodyear Tyre and Rubber Company announced in 2019 to build a new tyre production facility near to its current innovation hub in Colmar-Berg, Luxembourg which will produce about 500,000 units annually.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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25. ABOUT US & DISCLAIMER

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