

OTR Tires Market by Application (Construction & Mining Equipment, Agriculture Tractors, ATVs, Industrial Equipment), Agriculture Tractor by Power Output, Tire Type (Radial, Solid, Bias), Rim Size, Retreading (Application & Process), Aftermarket, Region - Global Forecast to 2032

<https://marketpublishers.com/r/O6714D60C2DEEN.html>

Date: May 2025

Pages: 462

Price: US\$ 4,950.00 (Single User License)

ID: O6714D60C2DEEN

Abstracts

The OTR tires market is estimated to grow from USD 3.66 billion in 2024 to USD 5.58 billion by 2032 at a CAGR of 6.2%.

The growth in infrastructure, construction, and mining activities worldwide is primarily driving the OTR tires market. In the US, significant investments are being made for critical minerals mining and infrastructure, with an investment of USD 3.8 million for the Ozark Plateau under the Bipartisan Infrastructure Law. Also, the Trump administration aims to accelerate critical mineral production domestically, reducing dependence on foreign sources, which will have an institutional investment of up to USD 800 million from the US Export-Import Bank for NioCorp's Elk Creek Critical Minerals. Moreover, China's investment of USD 70.7 billion in construction contracts and USD 21.4 billion in overseas mining under the Belt and Road Initiative from 2024 -2025 would drive the market for OTR tires in Asia Pacific. Also, the rapid growth in the construction, mining, and agriculture sectors is driven by infrastructure investments, urbanization, and increased use of heavy machinery in emerging economies. However, the OTR tires market faces some challenges with the volatility of raw material prices, high manufacturing costs, supply chain disruptions, and the need to adapt to evolving vehicle technologies and environmental regulations, all of which impact profitability.

Solid tires are the second fastest-growing segment of the construction equipment

market.

Solid tires are gaining popularity in the construction industry, particularly for compact equipment categories such as skid-steer loaders, RTLT-Telescopes, and compact wheeled loaders. These tires are made from solid rubber or rubber-like compounds, offering several advantages over pneumatic tires, including increased durability, puncture resistance, lower maintenance costs, and continuous operation with minimal downtime. At the regional level, the use of solid tires in construction and mining is growing steadily worldwide. The Asia Pacific region leads with rapid infrastructure and mining expansion, driving strong demand, whereas North America and Europe are witnessing gradual growth due to increased focus on durability, safety, and low maintenance in heavy equipment. For forklifts, solid tires are offered in a smaller size, ranging from 7.5-20 to 10.00- 20-inch, whereas for tow tractors, the solid tires typically range between 20.5 and 16-inch, which are designed to handle heavy loads in a harsh environment. These tires are replaced at very low rates and have lower maintenance costs, which improves and increases industrial operational efficiency and uptime. Also, these OTR tires find their application in warehouses and the industrial sector and have higher demand in regions such as North America, Europe, and Asia Pacific, where e-commerce and logistics industries are rapidly expanding, which is driving the demand for industrial vehicles equipped with solid tires. Solid OTR tires are priced lower than biased OTR tires in many applications.

Container handlers hold the largest industrial equipment OTR tires market.

Container handlers dominate the OTR tires market in the industrial equipment segment in 2025, owing to their increased operations in ports and logistics. In container handlers, empty & laden FLT vehicles and reach stacker vehicles are considered, which are usually offered with the same size of OTR tires on the front and rear axles. The tire sizes for this vehicle differ according to the tonnage capacity. Normally, the tire size offered in container handlers ranges from 12.00-24 to 16.00-25-inch, depending on their specific models and operational requirements. These OTR tires are primarily used in container handlers and are radial. They are designed to lift goods and transport shipping containers within ports and terminals, handling loads weighing several tons. Emerging economies are investing in developing new ports due to increased supply chain management. For instance, in Europe, the Port of Genoa in Italy is undergoing around USD 1 billion breakwater upgrade to enhance protection and accommodate larger vessels, expected to be completed by 2026. The Port of Rotterdam in the Netherlands is expanding its Maasvlakte II terminal with a USD 1.1 billion project that will add new deep-sea quay facilities, also targeted for completion around 2026. These

large-scale upcoming port projects are likely to increase the demand for large tonnage capacity of container handlers and different sizes of OTR tires, which will ultimately drive the demand for OTR tires.

Asia Pacific is the fastest-growing OTR tires market globally.

The Asia Pacific region dominates the global OTR tires market, with emerging economies such as China and India being significant contributors. Countries like China and India hold the largest construction & mining and agriculture tractors market. The infrastructural development in India and China is mostly for highways, bridges, industrial facilities, and power plants, significantly increasing the need for heavy-duty vehicles that rely on OTR tires. For instance, according to the Green Finance & Development Center's 'China Belt and Road Initiative (BRI) Investment Report 2024,' China's total BRI engagement in 2024 reached USD 121.8 billion, of which nearly USD 70.7 billion was used for infrastructure construction. Hence, these investments are driving the market for OTR tires in the Asia Pacific region.

The break-up of the profile of primary participants in the OTR tires market:

By Companies: OTR Tire Manufacturers - 100%

By Designation: Manager level - 30%, C-Level Executives - 50%, Others- 20%

By Region: North America - 10%, Europe – 30%, Asia Pacific - 40%, and Rest of the World – 20%

Global players dominate the OTR tires market and comprise several regional players. The key players in the OTR tires market are Continental AG (Germany), Bridgestone Corporation (US), Michelin (France), The Yokohama Rubber Co., Ltd. (Japan), Pirelli & C. S.p.A. (Italy), Trelleborg Wheels System (Sweden), Titan International Inc. (US), Nokian Tyres plc. (Finland), CEAT (India), Magna Tyres (Netherlands), The Carlstar Group, LLC. (US), Triangle Tire Co. (China), Apollo Tyres Ltd. (India), Double Coin Tire Group Ltd (China), Techking Tires (China), JK Tyre & Industries Ltd (India), Linglong Tire (China), Belshina (China), MRF Tyres (India), Qingdao Rhino Tire Co., Ltd. (China), Otani Tire Co. Ltd. (Thailand), and Balkrishna Industries Limited (India).

Research Coverage:

Equipment Type (Articulated Dump Truck, Asphalt Finisher, Backhoe Loader, Motor

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Grader, Rigid Dump Truck, RTLT-Telescope, Skid-steer Loader, Wheeled Excavator, Wheeled Loader 80 HP, Agriculture Tractor, and Others), Agriculture Tractor Tires, By Power Output (250 HP), Agriculture Tractor Tracks, By Power Output (131–250 HP, and >250 HP), Industrial Equipment By Type (Forklift, Tow Tractor, and Container Handler), Tire Type (Radial, Bias, and Solid), OTR Tires for Construction Equipment, By Tire Type (Radial, Bias, and Solid), Rim Size (14-24 Inches, 25-30 Inches, 31–50 Inches, > 50 Inches), Retreading By Process (Pre-cure and Mold Cure), Retreading By Application (Construction and Mining Equipment and Agriculture Tractor), By Application (Construction and Mining Equipment, Agriculture Tractor, Industrial Equipment, and All-terrain Vehicle), Aftermarket, By Equipment Type [Articulated Dump Truck, Asphalt Finisher, Backhoe Loader, Motor Grader, Rigid Dump Truck, RTLT-Telescope, Skid-steer Loader, Wheeled Excavator, Wheeled Loader 80 HP, By Region (Asia Pacific, Europe, North America, and Rest of the World)

The report's scope covers detailed information regarding the major factors influencing the growth of the OTR tires market. A thorough analysis of the key industry players has provided insights into their business overview, products, key strategies, contracts, partnerships, agreements, product launches, mergers and acquisitions, recession impact, and recent developments in the OTR tires market.

Key Benefits of Buying the Report:

The report will help market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall OTR tires market and the sub-segments. It will also help stakeholders understand the competitive landscape, gain insights into positioning their businesses better, and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following points:

Analysis of critical drivers (infrastructure development and growth in construction and mining activities, shift toward mechanization, and expanding off-highway equipment rental market), restraints (availability of low-cost tires from unorganized markets and commercialized use of integrated advanced sensor-based technologies), opportunities (focus on sustainability manufacturing techniques, rise in adoption for retreading method, and increase in sales of all-terrain vehicles), and challenges (high R&D cost, stringent emission regulations) influencing the growth of the OTR tires market

Product Development/Innovation: Detailed insights into upcoming technologies and products launched in the OTR tires market

Market Development: Comprehensive market information – the report analyzes the authentication and brand protection market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the OTR tires market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the OTR tires market, such as Continental AG (Germany), Bridgestone Corporation (US), Michelin (France), The Yokohama Rubber Co., Ltd. (Japan), and Pirelli & C. S.p.A. (Italy)

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