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Tire-Derived Polymer Market Forecasts to 2032 – Global Analysis By Type (Reclaimed Rubber, Crumb Rubber, Rubber Mulch, Tire-Derived Fuel (TDF), Shredded Tires, Steel Wire, and Other Types), Process Method, Distribution Channel, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Tire-Derived Polymer Market is accounted for $1.41 billion in 2025 and is expected to reach $2.49 billion by 2032 growing at a CAGR of 8.5% during the forecast period.Tire-Derived Polymer (TDP) is an eco-friendly material created by recycling used tires into versatile polymer compounds. It maintains the strength, flexibility, and durability of rubber while serving as a cost-efficient solution for multiple industries. Commonly applied in automotive, construction, and consumer products, TDP supports sustainability by reducing waste, conserving resources, and promoting a circular economy, effectively converting discarded tires into valuable, high-performance materials for diverse applications.

Market Dynamics:

Driver:

Growing environmental concerns and regulations

Heightened awareness of environmental degradation is prompting stricter regulations around waste management and resource recovery. Governments and industry bodies are increasingly mandating sustainable disposal practices for end-of-life tires. This regulatory pressure is driving innovation in tire recycling technologies, including the

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extraction of tire-derived polymers. These materials offer a lower environmental footprint compared to virgin alternatives, aligning with circular economy goals. As sustainability becomes a core priority across industries, demand for eco-friendly polymer solutions is rising. Consequently, tire-derived polymers are gaining traction as a viable substitute in various applications.

Restraint:

Inconsistent quality of recycled materials

Recycled polymers often exhibit inconsistent mechanical properties due to differences in feedstock composition and processing methods. This inconsistency can hinder their performance in high-spec applications, limiting broader adoption. Manufacturers face difficulties in standardizing outputs, which affects product reliability and customer confidence. Additionally, the lack of uniform quality control frameworks across regions exacerbates the issue. These limitations pose a significant barrier to scaling tire-derived polymer usage in mainstream industries.

Opportunity:

Increasing demand for recovered carbon black (rCB)

Recovered carbon black (rCB), sourced from discarded tires, is experiencing rising adoption across a range of industries.Its use in rubber, plastics, and coatings is expanding due to its cost-effectiveness and sustainability benefits. As companies seek to reduce reliance on virgin carbon black, rCB offers a compelling alternative with comparable performance. The push for greener supply chains is encouraging manufacturers to integrate rCB into their formulations. Moreover, advancements in pyrolysis and refining technologies are improving rCB quality and consistency. This trend is opening new avenues for tire-derived polymers in high-value applications.

Threat:

Competition from alternative materials and fuels

Innovations in biodegradable polymers and advanced composites are offering attractive alternatives with superior properties. Additionally, waste tires are increasingly being diverted toward energy recovery, reducing feedstock availability for polymer extraction. These competing uses can dilute market growth and investment in tire-derived

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technologies. Furthermore, shifting industry preferences toward low-carbon materials may favor other solutions over tire-derived options. This competitive landscape poses a strategic challenge for market players aiming to scale operations.

Covid-19 Impact

The COVID-19 pandemic disrupted global supply chains, affecting tire collection and recycling operations. Lockdowns and reduced industrial activity led to a temporary decline in tire waste generation. However, the crisis also underscored the importance of resilient and sustainable material sourcing. As industries recover, there is renewed interest in circular economy models, including tire-derived polymers. Post-pandemic strategies are emphasizing resource efficiency and environmental compliance. These shifts are expected to support long-term growth in the tire-derived polymer market, despite short-term setbacks.

The crumb rubber segment is expected to be the largest during the forecast period

The crumb rubbersegment is expected to account for the largest market share during the forecast period, due to its eco-conscious applications, particularly in noise-reducing road surfaces and durable infrastructure. Innovations in cryogenic grinding and devulcanization are enhancing production efficiency and material performance. New uses in playgrounds, synthetic turf, and moulded items reflect evolving market trends. Recent advancements in binder technologies and sustainable recycling practices, coupled with stricter environmental policies and global infrastructure growth, are further accelerating its adoption across industries.

The adhesives & sealantssegment is expected to have the highest CAGR during the forecast period

Over the forecast period, the adhesives & sealantssegment is predicted to witness the highest growth rate, propelled by rising demand for lightweight, durable bonding solutions in automotive and industrial applications. Advanced technologies like reactive and UV-cured adhesives enhance performance under extreme conditions. Emerging trends include their integration into electric vehicle components and sustainable packaging. Key developments involve innovations in epoxy and polyurethane formulations, improved thermal stability, and regulatory shifts favouring low-VOC materials, all contributing to expanded use of tire-derived polymers in high-performance adhesive systems.

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Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market sharedue to booming urban development, rising vehicle production, and large-scale infrastructure projects, particularly in India and China. Cutting-edge techniques like cryogenic grinding and devulcanization are improving the efficiency and quality of recycled rubber. The region is seeing a shift toward sustainable rubber alternatives and polymers designed for electric vehicles. Recent progress includes stricter environmental laws, government-backed road initiatives, and innovations in airless and low-resistance tires that are boosting market demand.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, due to increasing environmental awareness, sustainability goals, and demand for recycled materials in sectors like construction and automotive. Innovations in pyrolysis, cryogenic techniques, and devulcanization are improving the efficiency and quality of recovered polymers. The market is also seeing a shift toward green infrastructure and electric vehicle applications. Notable progress includes enhanced recycling initiatives, development of low-emission adhesive technologies, and broader use of tire-derived materials in civil engineering and industrial projects.

Key players in the market

Some of the key players profiled in the Tire-Derived Polymer Market includeBridgestone Corporation, GreenMan Technologies, Michelin Group, Lehigh Technologies, Continental AG, Genan, Goodyear Tire & Rubber Company, Black Bear Carbon, Kuraray Co., Ltd., Ecolomondo Corporation, ExxonMobil Corporation, Liberty Tire Recycling, JSR Corporation, Umicore, and PetroChina Company Limited.

Key Developments:

In July2025,Bridgestone Corporation and ispace, inc. announced that the companies have signed a basic agreement towards practical application of tires for small and medium-sized lunar rovers.Based on this agreement, ispace and Bridgestone will jointly aim to enhance the performance of small and medium-sized lunar rovers.

In November 2024, ExxonMobil plans to invest more than $200 million to expand its advanced recycling operations at its sites in Baytown and Beaumont, Texas. The new

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operations are expected to start up in 2026 and can help increase advanced recycling rates and divert plastic from landfills. The company plans to build additional units to reach a global recycling capacity of 1 billion pounds per year.

Types Covered:

- Reclaimed Rubber
- Crumb Rubber
- Rubber Mulch
- Tire-Derived Fuel (TDF)
- Shredded Tires
- Steel Wire
- Other Types

Process Methods Covered:

- Mechanical Processing
- Chemical Processing
- Cryogenic Processing
- Devulcanization
- Thermal Processing

Distribution Channels Covered:

- Direct Sales
- Distributors

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- Retailers
- Wholesale Suppliers
- E-commerce Platforms

Applications Covered:

- Construction
- Consumer Goods
- Industrial
- Adhesives & Sealants
- Sports & Leisure
- Other Applications

End Users Covered:

- Automotive OEMs
- Construction & Infrastructure
- Recycling & Waste Management Firms
- Consumer Goods Manufacturers
- Other End Users

Regions Covered:

- North America

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- US
- Canada
- Mexico

Europe

- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

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Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

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Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Contents

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5 GLOBAL TIRE-DERIVED POLYMER MARKET, BY TYPE

6 GLOBAL TIRE-DERIVED POLYMER MARKET, BY PROCESS METHOD

7 GLOBAL TIRE-DERIVED POLYMER MARKET, BY DISTRIBUTION CHANNEL

8 GLOBAL TIRE-DERIVED POLYMER MARKET, BY APPLICATION

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9 GLOBAL TIRE-DERIVED POLYMER MARKET, BY END USER

10 GLOBAL TIRE-DERIVED POLYMER MARKET, BY GEOGRAPHY

+357 96 030922
info@marketpublishers.com

11 KEY DEVELOPMENTS

12 COMPANY PROFILING

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List Of Tables

LIST OF TABLES

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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