

Medium & Heavy Commercial Vehicle Tire Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Vehicle Weight (Less than 3.5 Tons, 3.5 and 16 Tons, and Greater than 16 Tons), By Application (Construction, Mining, Agriculture, Transport, and Others), By Demand Category (OEM and Aftermarket), By Region & Competition, & Opportunities 2021-2031F

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Abstracts

The Global Medium & Heavy Commercial Vehicle Tire Market is projected to expand significantly, rising from 223.06 million units in 2025 to 390.56 million units by 2031, reflecting a compound annual growth rate (CAGR) of 9.79%. This market entails the production and sale of specialized tires engineered for high-gross-vehicle-weight assets such as trucks, buses, and trailers. Growth is largely fueled by the escalating global need for logistics and freight services, which leads to high vehicle utilization and frequent tire replacements. Additionally, significant government funding for construction and infrastructure initiatives in developing nations creates a strong demand for durable tires built to endure heavy loads and harsh operating environments.

A primary obstacle facing this market is the instability of raw material costs, specifically crude oil and natural rubber, which complicates pricing and production strategies. Despite these hurdles, the sector demonstrates resilience; for instance, the U.S. Tire Manufacturers Association projected a 12.5% increase in replacement truck tire shipments in the United States for 2024 compared to the prior year. This data highlights the enduring strength of the replacement segment, even as manufacturers contend with supply chain limitations and fluctuating input expenses.

Market Driver

The expansion of e-commerce and last-mile delivery services is fundamentally altering the medium and heavy commercial vehicle tire sector by increasing the reliance on regional distribution fleets. As logistics networks decentralize to ensure rapid fulfillment, operators increasingly depend on medium-duty trucks to connect distribution centers with end consumers. These vehicles operate under demanding conditions, including frequent stops and high utilization, which accelerates tire wear and drives the need for durable, high-performance replacements. According to the European Automobile Manufacturers' Association's January 2025 report on 2024 registrations, medium truck registrations in the European Union grew by 5.6% year-on-year, directly supporting the demand for tires capable of managing the stability and load requirements of modern logistics.

Concurrently, the modernization of fleets and the expansion of public transportation networks act as major market catalysts. Cities globally are upgrading transit systems to improve urban mobility, resulting in a consistent influx of new buses that require heavy-duty tires to support daily mileage and increased passenger weight. This shift often involves adopting advanced platforms that necessitate tires with enhanced safety features and higher load indices. Data from the European Automobile Manufacturers' Association in January 2025 indicated that new bus sales in the EU climbed by 9.2% to 35,579 units. Furthermore, the market is buoyed by massive production scales in key regions; the China Association of Automobile Manufacturers reported in 2025 that commercial vehicle sales in China hit 3.873 million units the previous year, underscoring the substantial global foundation for tire demand.

Market Challenge

The instability of raw material prices, specifically for crude oil and natural rubber, represents a significant impediment to the steady expansion of the Global Medium and Heavy Commercial Vehicle Tire Market. Manufacturers in this industry rely on capital-intensive processes where raw materials account for a substantial portion of expenses. When input costs swing unpredictably, producers must choose between absorbing the costs, which reduces profit margins, or passing them on to buyers. In the commercial realm, where fleet operators work with strict budgets, even slight price hikes can result in reduced order volumes and delayed replacement cycles, thereby hindering market growth.

This volatility is worsened by inherent supply-demand disparities in global commodity markets, leading to persistent inflationary pressures. The Association of Natural Rubber Producing Countries projected that global natural rubber consumption would hit 15.45 million tonnes in 2024, significantly exceeding the production estimate of 14.29 million tonnes. This shortfall creates a high-cost environment that complicates long-term pricing strategies for manufacturers. Consequently, the difficulty in accurately predicting operational costs discourages investment in production capabilities and slows overall market momentum, particularly in regions sensitive to price changes.

Market Trends

A defining trend in the market is the creation of specialized high-load tires for electric commercial vehicles, driven by the increasing integration of battery-electric trucks into fleet operations. Because electric trucks carry heavy battery packs and deliver instant torque, they impose unique stress factors and have significantly higher curb weights than internal combustion engine vehicles. To address this, manufacturers are developing tires with advanced tread compounds and reinforced casings that can support heavier loads while minimizing rolling resistance to maximize vehicle range. The growing need for these purpose-built solutions is reflected in the adoption rates of zero-emission heavy-duty vehicles; the European Automobile Manufacturers' Association reported in October 2025 that electrically chargeable trucks captured 3.8% of the EU truck market share in the first three quarters, rising from 2.1% in the prior year.

In parallel, the shift toward sustainable and bio-based manufacturing materials is transforming production strategies to meet corporate circular economy objectives and strict environmental regulations. Manufacturers are increasingly substituting petrochemical-based components with renewable alternatives, such as recycled carbon black and silica from rice husks or dandelions, to lower the carbon footprint of their products. This transition is motivated by the volatility of raw material prices and the urgent need for fleets to achieve Scope 3 emission reduction targets. Highlighting the scale of this shift, EV Magazine noted in May 2025 that Michelin had successfully raised the share of recycled or renewable materials in its tire manufacturing to 31%, signaling a major advancement toward its long-term sustainability goals.

Key Market Players

Bridgestone Corporation

Continental AG

Balkrishna Industries Limited

The Michelin Group

Trelleborg Corporation

ATG Tires Private Limited

Sumitomo Corporation

Hankook Tire and Technology Group

McLaren Industries

Goodyear Tire And Rubber Company

Report Scope

In this report, the Global Medium & Heavy Commercial Vehicle Tire Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Medium & Heavy Commercial Vehicle Tire Market, By Vehicle Weight

Less than 3.5 Tons

3.5 and 16 Tons

Greater than 16 Tons

Medium & Heavy Commercial Vehicle Tire Market, By Application

Construction

Mining

Agriculture

Transport

Others

Medium & Heavy Commercial Vehicle Tire Market, By Demand Category

OEM

Aftermarket

Medium & Heavy Commercial Vehicle Tire Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Medium & Heavy Commercial Vehicle Tire Market.

Available Customizations:

Global Medium & Heavy Commercial Vehicle Tire Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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