

Automotive Medium & Heavy Commercial Vehicle Green Tires Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Tire Type (Radial, Bias), By Demand Category (OEM, Replacement), By Region, Competition, 2018-2028

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Abstracts

Global Automotive Medium & Heavy Commercial Vehicle Green Tires Market has valued at USD 10 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.6% through 2028. The Global Automotive Medium & Heavy Commercial Vehicle (M&HCV) Green Tires Market is undergoing a profound transformation driven by environmental consciousness, technological advancements, and economic pragmatism. Green tires, engineered to reduce rolling resistance and enhance fuel efficiency, are at the forefront of this evolution. Stringent environmental regulations and emission reduction targets imposed by governments worldwide are pushing the automotive industry to embrace eco-friendly solutions. Green tires align seamlessly with these objectives, contributing to lower carbon emissions and reduced fuel consumption, thus making them a crucial component in meeting these ambitious targets. Furthermore, the economic advantages of green tires are driving their adoption. Fleet operators, who manage substantial numbers of M&HCVs, are increasingly turning to green tires to optimize operational costs. These tires not only improve fuel efficiency but also boast longer tread life, resulting in significant savings over time. Moreover, eco-conscious consumers are seeking sustainable transportation solutions, prompting manufacturers to make green tires accessible across various price ranges.

Key Market Drivers

Environmental Regulations and Emission Reduction Targets

One of the most significant drivers propelling the Global Automotive M&HCV Green Tires Market is the stringent environmental regulations and emission reduction targets imposed by governments and international bodies worldwide. Governments are increasingly recognizing the role of vehicle emissions in air pollution and climate change, and they are taking decisive steps to address these issues.

Green tires, characterized by their ability to reduce rolling resistance and improve fuel efficiency, align perfectly with the objectives of these regulations. By enhancing fuel efficiency, green tires contribute to lower CO₂ emissions and reduced fuel consumption, which are critical factors in meeting emission reduction targets. As environmental regulations continue to evolve and become more stringent, the demand for green tires in the M&HCV market is expected to grow significantly. Manufacturers, in response to these regulations, are actively investing in research and development to develop green tire technologies that meet both performance and sustainability requirements.

Cost Savings for Fleet Operators

Fleet operators represent a substantial portion of the Global Automotive M&HCV Green Tires Market, and one of the key drivers for their adoption of green tires is the potential for significant cost savings. Fleet operators manage large numbers of M&HCVs, and small improvements in fuel efficiency and tire lifespan can translate into substantial financial benefits.

Green tires, by reducing rolling resistance, improve the fuel efficiency of M&HCVs. For fleet operators, this translates into lower fuel consumption and reduced operating costs. Even a minor improvement in fuel efficiency can lead to substantial savings over the course of a year, especially when multiplied across a fleet of vehicles. Moreover, green tires tend to have longer tread life compared to conventional tires due to their reduced rolling resistance. This means that they need to be replaced less frequently, resulting in lower maintenance costs for fleet operators. Reduced downtime for tire replacements also enhances operational efficiency and minimizes disruptions in logistics and transportation services.

Efficiency is a critical consideration for fleet operators. Green tires not only contribute to lower fuel costs but also improve the overall operational efficiency of M&HCV fleets. With improved fuel economy and longer-lasting tires, fleet operators can meet delivery schedules more reliably, reduce maintenance-related downtime, and optimize the utilization of their vehicles. As fleet operators increasingly recognize the economic benefits of green tires, their adoption is expected to grow substantially. The potential for

cost savings, coupled with the environmental benefits, makes green tires an attractive choice for fleet managers seeking to enhance their bottom line while reducing their carbon footprint.

Eco-Conscious Consumer Demand

Consumer preferences are playing a significant role in driving the adoption of green tires in the Global Automotive M&HCV Green Tires Market. Today's consumers are increasingly environmentally conscious, and their purchasing decisions are often influenced by eco-friendly considerations. Medium and heavy commercial vehicles are commonly used for industrial purposes, including transporting goods and materials. Consequently, businesses and consumers are eager to reduce their carbon footprint and contribute to a cleaner environment. Green tires, designed to deliver improved fuel efficiency, lower CO₂ emissions, and overall eco-friendly performance, align perfectly with these aspirations.

Furthermore, the increasing availability of green tires across various price ranges ensures that eco-friendly options are accessible to a broader consumer base. Historically, green tires were associated with premium or high-end segments, but they are now offered in mid-range and budget categories as well. This democratization of green tire options empowers consumers with varying budgets to make environmentally responsible choices. Moreover, environmental awareness and sustainability have become essential elements of brand reputation for automakers and tire manufacturers. Companies that prioritize eco-friendly products and practices are perceived as socially responsible and forward-thinking, appealing to consumers who seek products aligned with their values.

Fuel Efficiency and Operational Cost Considerations

Fuel efficiency and operational cost considerations are fundamental drivers of green tire adoption in the Global Automotive M&HCV Green Tires Market. Medium and heavy commercial vehicles, often used for logistics, transportation, and industrial applications, are subject to intense cost pressures, making fuel efficiency a critical factor in operational sustainability. Green tires, with their ability to reduce rolling resistance, improve fuel efficiency significantly. This leads to lower fuel consumption, which is a direct cost-saving measure for M&HCV operators. Even a modest improvement in fuel efficiency can result in substantial annual savings when multiplied across a fleet of vehicles.

Key Market Challenges

Cost Considerations and Price Sensitivity

One of the primary challenges hindering the widespread adoption of green tires in the Global Automotive M&HCV Green Tires Market is the cost differential between green tires and conventional ones. Green tires, engineered to reduce rolling resistance and enhance fuel efficiency, often come with a higher upfront purchase price. This price premium can be a significant deterrent for fleet operators and M&HCV manufacturers, who often operate within tight budget constraints. M&HCVs are known for their substantial tire requirements, as they are designed to carry heavy loads over long distances. Consequently, the cost of equipping an entire fleet of M&HCVs with green tires can be a considerable financial burden. Fleet operators often prioritize minimizing operational costs, making it challenging to justify the higher initial investment in green tires, despite their potential long-term savings in fuel expenses.

Furthermore, M&HCV manufacturers may hesitate to incorporate green tires as standard equipment in their vehicles due to concerns about price sensitivity among potential buyers. Customers who purchase these vehicles are typically keen on optimizing their return on investment, and they may resist any increase in the purchase price.

Limited Availability and Variety

The Global Automotive M&HCV Green Tires Market faces a challenge related to the limited availability and variety of green tire options. Historically, green tires were predominantly associated with smaller vehicles, and the diversity of green tire offerings for larger M&HCVs has been relatively limited. This lack of variety poses difficulties for fleet operators and M&HCV manufacturers seeking green tire solutions that cater to the specific requirements of heavy-duty commercial vehicles. The diversity of M&HCV operations presents unique demands in terms of tire size, load-bearing capacity, tread patterns, and durability. These variations necessitate a wide range of tire options to accommodate different M&HCV types, road conditions, and usage scenarios. However, the limited variety of green tires may not provide sufficient choices for M&HCV operators who need specialized solutions tailored to their specific needs. Moreover, M&HCVs often operate in challenging environments, including rough terrains, extreme weather conditions, and long-distance hauling. Green tires designed for such demanding conditions are relatively scarce, leading to concerns about the adaptability and performance of green tires in these scenarios.

Performance Trade-Offs and Durability Concerns

The perception of a trade-off between eco-friendliness and tire performance is a significant challenge facing the Global Automotive M&HCV Green Tires Market. Some M&HCV operators and fleet managers are apprehensive about adopting green tires due to concerns that these tires may compromise performance attributes such as traction, handling, and durability. Green tires are engineered to reduce rolling resistance, primarily achieved through alterations in tread patterns and tire compounds. While this design benefits fuel efficiency and environmental sustainability, it can lead to concerns about tire performance, particularly in challenging conditions. M&HCVs are often subjected to demanding scenarios, including off-road operations, heavy loads, and long-haul routes. In such conditions, tire performance is paramount, and any perceived trade-offs in performance can be a significant deterrent to adopting green tires. Fleet managers are unwilling to compromise on factors like traction and durability, which are essential for the safety and efficiency of their operations. Additionally, education and awareness campaigns are vital to informing M&HCV operators about the advantages of green tires, including their ability to deliver both fuel efficiency and performance. Providing transparency regarding tire specifications, testing results, and real-world performance data can alleviate concerns and foster greater confidence in green tire technology.

Lack of Awareness and Education

A significant challenge in the Global Automotive M&HCV Green Tires Market is the lack of awareness and education surrounding green tire technology. Many M&HCV operators, fleet managers, and even end-users are not well-informed about the benefits of green tires, how they function, or their potential for reducing fuel consumption and carbon emissions. This lack of awareness often leads to a default preference for conventional tires, particularly among M&HCV operators who are accustomed to established tire brands and models. When decision-makers are not aware of the advantages of green tires, they may hesitate to make the switch, even if the potential benefits include substantial fuel savings and reduced environmental impact. Furthermore, regulatory initiatives such as tire labeling regulations can play a significant role in educating consumers and fleet operators. These regulations require tire manufacturers to provide information on fuel efficiency, wet grip performance, and noise levels, empowering consumers to make informed choices. Educational programs aimed at fleet managers and M&HCV operators should also be conducted to highlight the long-term cost benefits of green tires and their contribution to sustainability.

Infrastructure Compatibility and Maintenance Challenges

The compatibility of green tires with existing infrastructure and maintenance practices poses a practical challenge in the adoption of green tires in the M&HCV sector. Fleet operators and M&HCV manufacturers often have established maintenance procedures, equipment, and tire management systems that are optimized for conventional tires. Green tires, with their unique characteristics and requirements for optimal performance, may necessitate changes in maintenance routines and equipment. Implementing these changes can involve upfront investments in technology and training, which can be a barrier to the adoption of green tires.

Key Market Trends

Increasing Adoption of Smart and Connected Tires

One of the most notable trends in the Global Automotive M&HCV Green Tires Market is the increasing adoption of smart and connected tires. As the automotive industry embraces digital transformation, tires are becoming an integral part of the connected vehicle ecosystem. Smart tire technology leverages sensors embedded in the tire to gather real-time data on tire pressure, temperature, tread wear, and road conditions. For medium and heavy commercial vehicles, the benefits of smart and connected tires are multifaceted. These tires provide real-time tire health monitoring, allowing fleet operators to proactively address issues such as underinflation, which can lead to increased rolling resistance and reduced fuel efficiency. Smart tires also contribute to improved safety by providing early warnings about potential tire failures or blowouts, helping prevent accidents and costly downtime.

In addition to safety and maintenance benefits, smart tires enhance overall fleet management. They provide valuable data on tire performance, which can be analyzed to optimize routes, load distribution, and vehicle maintenance schedules. This data-driven approach helps fleet operators maximize fuel efficiency and reduce operational costs while extending the lifespan of their green tires. Furthermore, the connectivity of smart tires allows for remote monitoring and diagnostics, enabling proactive maintenance and reducing unplanned downtime. Fleet operators can receive alerts and notifications about tire issues in real-time, allowing them to take immediate action to prevent costly breakdowns.

Growing Focus on Sustainable Tire Materials and Production Processes

Another prominent trend in the Global Automotive M&HCV Green Tires Market is the growing emphasis on sustainable tire materials and production processes.

Environmental sustainability has become a core focus for tire manufacturers, driven by both consumer demand for eco-friendly products and regulatory pressures to reduce the carbon footprint of tire production. Moreover, there is a push to develop more eco-friendly processes for tire manufacturing. The tire industry is exploring cleaner and more efficient production methods, such as reducing energy consumption during vulcanization processes and minimizing waste generation. Sustainable practices in manufacturing align with the broader goal of reducing the environmental footprint of the entire supply chain, from raw material extraction to tire disposal.

In addition to sustainable materials and production processes, tire manufacturers are also focusing on improving the recyclability and reusability of tires. Efforts are being made to develop tires that are easier to recycle or retread, thereby reducing the volume of waste tires in landfills and contributing to a circular economy. This trend toward sustainable tire materials and production processes aligns perfectly with the eco-friendly characteristics of green tires. As consumer and regulatory pressure for sustainability continues to mount, tire manufacturers are expected to further integrate environmentally responsible practices into their operations, making green tires an even more attractive choice for M&HCV operators seeking to reduce their carbon footprint.

Advancements in Tire Tread Design for Enhanced Performance

Advancements in tire tread design represent a significant trend in the Global Automotive M&HCV Green Tires Market. Tire tread plays a crucial role in a tire's performance, affecting factors such as traction, handling, wet grip, and rolling resistance. As manufacturers seek to strike a balance between improved fuel efficiency and enhanced performance, tire tread design innovations are at the forefront of these efforts. Incorporating three-dimensional siping and biting edges into tread designs enhances wet grip and snow traction, addressing one of the common performance concerns associated with green tires. Additionally, silica-based compounds and advanced polymer blends are used to create tread formulations that maintain their performance characteristics even as rolling resistance is minimized. These advancements in tread design not only enhance the overall performance of green tires but also contribute to safety and driver confidence. Medium and heavy commercial vehicles often operate in challenging conditions, including rain, snow, and uneven road surfaces. Green tires equipped with advanced tread patterns and compounds offer reliable and consistent performance, making them a preferred choice for M&HCV operators.

Increased Availability of Retreaded Green Tires

A noteworthy trend in the Global Automotive M&HCV Green Tires Market is the increased availability of retreaded green tires. Retreading involves refurbishing worn tire casings with new treads, providing a cost-effective and eco-friendly alternative to purchasing entirely new tires. This trend is particularly significant in the M&HCV sector, where tires are subjected to heavy loads and wear.

Retreading not only extends the lifespan of tires but also aligns with sustainability goals by reducing waste. Retreaded green tires offer the dual benefits of improved fuel efficiency and reduced environmental impact. The retreading process involves applying a new green tire tread on a carefully inspected and repaired casing, ensuring that the tire retains its eco-friendly attributes.

Fleet operators and M&HCV owners are increasingly recognizing the economic advantages of retreaded green tires. These tires are not only more affordable than new green tires but also deliver the same fuel efficiency benefits. The availability of retreaded green tires allows operators to maximize the lifespan of their existing tire casings while enjoying the advantages of fuel savings and reduced carbon emissions.

Moreover, the retreading industry is continuously evolving, adopting advanced technologies and materials to enhance the quality and durability of retreaded tires. As a result, retreaded green tires have become a reliable and cost-effective solution for M&HCV operators seeking to reduce their operational expenses and environmental footprint. This trend is expected to gain further momentum as sustainability becomes a key consideration for fleet management, and as retreaded green tires become more widely available and trusted in the market.

Segmental Insights

Demand Category Analysis

The market is divided into two subgroups: OEM and aftermarket, depending on the sales channel. A growing number of environmental and safety concerns have caused the OEM segment to command a significant volume and value share of the global market. To combat the rising level of vehicle emissions and lower fuel consumption, OEM firms are investing in research to develop innovative, environmentally friendly, lightweight, and long-lasting tires. For instance, in 2019, Sumitomo Rubber Industries

Ltd. and Kansai University created a cutting-edge technology that can generate electrical energy while a vehicle's tires are rotating. In order to produce energy from tire rotation, the tires make use of the buildup of static electricity, commonly known as friction charging.

The aftermarket sector, which already commands a sizeable portion of the worldwide market, is predicted to grow even more in the years to come. The primary elements that are anticipated to drive the aftermarket industry are the rising propensity of existing vehicle owners and automobile manufacturers towards a clean, green environment as well as the requirement for high fuel efficiency. Additionally, the use of renewable raw materials in tire manufacturing and technical advancements are supporting the aftermarket green tire market.

Regional Insights

Due to increasingly strict government laws designed to cut carbon emissions and encourage environmentally friendly vehicles and vehicle parts, Europe currently dominates worldwide industry. In 1990, silane and silica were used to make tire treads, which helped to establish the market and give rise to green tire. Due to their assistance in lowering rolling resistance, these tires are also known as energy tires in Europe. Therefore, the market for green tires has drawn the attention of everyone in this region, including all the tire manufacturers and suppliers in Europe. The main automakers' choice of automobile components suppliers helps them adhere to the region's high emission requirements (EURO VI).

Tires play a significant role in fuel efficiency and emissions reduction. Additionally, major tire producers and automakers are collaborating to create the next generation of environmentally friendly tires. Additionally, the European Commission is developing post-2020 carbon dioxide emission standards for cars and trucks, which are anticipated to encourage the use of eco-friendly tires in this region's OEM and aftermarket markets. For instance, Michelin and General Motors collaborated to create a revolutionary wheel prototype in 2019 that is intended to replace current pneumatic tires and wheels. The Michelin UPTIS renewable materials decrease the quantity of scrap tires, which lowers the total amount of energy and raw materials required to produce tires.

Automakers in North America are quickly incorporating green car technologies. In addition, the market is expanding due to the rising number of infrastructure projects and the demand for replacement tires. Additionally, the growth of vehicle fleets for agricultural and construction uses will continue to drive up demand in the upcoming

years.

In addition, the market in nations like China, Japan, and India is anticipated to grow in the approaching years due to the dynamic automotive industry in the Asia Pacific region. Due to the region's extensive capacity for producing polyester goods, accessibility of raw materials, and well-established distribution network, the market for green tires is more expansive there.

Key Market Players

Bridgestone Corporation

Continental AG

Michelin Group

Apollo Tyres Limited

Yokohama Tire Corporation

Goodyear Tire & Rubber Company

Pirelli & C. Spa

Toyo Tire Corporation

MRF Limited

CEAT Limited

Report Scope:

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

Automotive Medium & Heavy Commercial Vehicle Green Tires Market, By Tire Type:

Radial

Bias

Automotive Medium & Heavy Commercial Vehicle Green Tires Market, By
Demand Category:

OEM

Replacement

Automotive Medium & Heavy Commercial Vehicle Green Tires Market, By
Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Russia

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Competitive Landscape

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

Available Customizations:

Global Automotive Medium & Heavy Commercial Vehicle Green Tires market report with the given market data, Tech Sci 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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