

Latin America Two-Wheeler Tire Market, By Vehicle Type (Motorcycles and Scooters), By Demand Category (OEM and Replacement), By Tire Construction Type (Radial and Bias), By Country, Competition, Forecast & Opportunities, 2018-2028

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Abstracts

The Latin America two-wheeler tire market achieved a value of USD 1823.85 million in 2022 and is anticipated to reach USD 2342.92 billion by 2028, with a projected CAGR of 4.58% during the forecast period. This growth can be attributed to the increasing preference for radial tires over bias tires, driven by benefits like reduced fuel consumption, improved traction, and lower rolling resistance. Radial tires also face fewer regulatory restrictions in many countries. Additionally, the rising demand for electric two-wheelers is boosting the need for new tires in the Latin American region. There's a growing emphasis on sustainable materials in tire manufacturing, with the use of substances like silica and soybean oil, resulting in improved tire quality in terms of grip, slip resistance, and heat dissipation. In the demand category, the replacement segment held the largest market share at 80.45% in 2022 and is expected to maintain dominance due to increased two-wheeler usage in logistics and ride-hailing services. Brazil leads the market with a substantial 46.19% market share in 2022 and is projected to grow at a CAGR of 5.04% from 2023 to 2028.

The Latin America two-wheeler tire market represents a vital segment of the region's automotive industry, driven primarily by the significant use of motorcycles and scooters for personal transportation and commercial purposes. This market encompasses a diverse range of two-wheeler vehicles, including motorcycles, scooters, and electric bikes, and is characterized by various factors shaping its dynamics. One of the key drivers of the Latin America two-wheeler tire market is the region's growing urbanization and population density. In densely populated urban areas, two-wheelers are often

preferred as a practical and cost-effective means of transportation, particularly for navigating through traffic congestion. This trend is particularly pronounced in countries like Brazil, Mexico, and Colombia, where motorcycles and scooters serve as essential modes of daily commuting.

Moreover, economic factors play a crucial role in the demand for two-wheeler tires in Latin America. The affordability and relatively low operating costs of motorcycles and scooters make them accessible to a broad demographic, including individuals with limited disposable income. This affordability factor contributes to the sustained demand for two-wheelers and their associated tires. Environmental concerns and fuel efficiency are emerging as influential factors in the Latin America two-wheeler tire market. As environmental awareness grows, consumers are increasingly seeking fuel-efficient and eco-friendly options. Motorcycle and scooter manufacturers are responding by designing more fuel-efficient models, which require tires that can maximize mileage while providing adequate grip and durability. This demand for eco-friendly and energy-efficient tires is likely to drive innovation within the market.

However, challenges persist in this market. Safety concerns, including accidents related to two-wheelers, have led to increased government scrutiny and regulations. Ensuring the safety of riders and passengers is paramount, and this has prompted manufacturers to develop tires with enhanced traction and braking capabilities. Additionally, the market faces competition from other forms of transportation, including public transit options and rideshare services. In conclusion, the Latin America two-wheeler tire market is characterized by its reliance on motorcycles and scooters for urban mobility and cost-effective transportation. While affordability and urbanization continue to drive demand, factors like environmental awareness and safety concerns are shaping the market's future. Meeting these evolving consumer expectations and regulatory standards will be essential for tire manufacturers operating in this dynamic and competitive landscape.

Key Market Drivers

Increased Demand for Radial Tires

The rising demand for radial tires can be attributed to their advantages, including low rolling resistance, which significantly enhances overall fuel efficiency by reducing fuel consumption by approximately 8-10% compared to other tire types. Additionally, radial tires offer superior traction, making them increasingly popular among consumers. Manufacturers of two-wheeler tires are increasingly focusing on this tire segment due to its growing popularity. Furthermore, compliance with regulatory standards for radial tires

is relatively straightforward for manufacturers, further driving their adoption. Radial tires also provide better road contact, improved steering, and enhanced driving comfort, along with increased resistance against tread-related damage. These factors collectively encourage two-wheeler manufacturers to prefer radial tires over alternative options.

Development in Sustainable Tire Composition

The two-wheeler tire industry's increasing emphasis on lightweight tire designs, incorporating sustainable materials, and optimizing end-to-end production processes is effectively reducing the specific material requirements within the tire manufacturing sector. These efforts have enabled two-wheeler tire manufacturers to enhance heat dissipation in their products, leading to reduced carbon black usage. Typically, carbon black accounts for approximately 22% of a tire's composition, so reducing its volume not only cuts costs but also contributes to lower emissions. Another beneficial shift involves the increased utilization of 'silica' components, streamlining the tire manufacturing process while simultaneously reducing rolling resistance and enhancing cut and slip resistance, ultimately elevating tire performance. In the case of two and three-wheeler vehicles, the carbon black content is minimized, given their lower load-bearing capacity compared to commercial vehicles. Furthermore, many premium tire brands are adopting more sustainable practices, such as substituting petroleum-based oils with soybean oil, a change that requires approximately half the number of petroleum-based oils to achieve the same level of extension during tire manufacturing. Collectively, these factors drive the growth of the two-wheeler tire industry in Latin America.

Growth of Two-Wheeler Industry

The growth of the two-wheeler tire industry in Latin America has been influenced by the in-line growth of the two-wheeler market across the region. As the tire market operates in parallel with the automobile industry, the emergence of new two-wheeler manufacturers in key regional markets has also benefited the overall market. In the future, the increasing demand for electric Two-Wheelers will provide further growth opportunities for the two-wheeler tire industry. According to two-wheeler manufacturers, the demand for more innovative concepts for EVs will also create a new category of tire series in the market.

Rising Urbanization and Traffic Congestion

Latin American cities are experiencing rapid urbanization, leading to increased traffic

congestion on roads. As a result, two-wheelers, such as motorcycles and scooters, have become popular choices for navigating through crowded urban areas. They offer a practical and cost-effective solution to commuters seeking to avoid traffic jams. This trend is particularly evident in megacities like São Paulo, Mexico City, and Buenos Aires. The demand for two-wheeler tires is directly linked to the growth of urban populations and traffic congestion, making it a significant driver of the market.

Affordability and Cost-Effective Transportation

Two-wheelers are often more affordable to purchase and operate compared to four-wheelers. This affordability factor makes them accessible to a wide range of consumers, including those with limited disposable income. As economic conditions vary across Latin American countries, many individuals opt for two-wheelers as a cost-effective means of transportation. The lower initial purchase price and reduced fuel expenses further boost the demand for two-wheelers, spurring the need for replacement tires.

Environmental Concerns and Fuel Efficiency

Increasing environmental awareness is encouraging consumers to consider more fuel-efficient and eco-friendly transportation options. Two-wheelers are perceived as having a smaller environmental footprint compared to larger vehicles. Manufacturers are responding to this trend by designing more fuel-efficient models, which require tires that can maximize mileage while offering adequate grip and durability. Consumers are increasingly seeking tires that contribute to lower fuel consumption, aligning with their environmental concerns.

Safety Regulations and Tire Improvements

Safety concerns associated with two-wheelers, including accidents, have led to heightened government scrutiny and regulatory standards. This has prompted tire manufacturers to develop safer and more reliable tires with improved traction, braking capabilities, and resistance against tread-related damage. Meeting these safety requirements is essential to ensure rider and passenger safety and comply with government regulations, thereby driving innovation within the tire market.

Growth of Electric Two-Wheelers

The Latin American market is witnessing a surge in the popularity of electric two-wheelers, including electric scooters and electric motorcycles. These vehicles are

viewed as eco-friendly alternatives to traditional gasoline-powered two-wheelers. As the adoption of electric two-wheelers grows, there is a corresponding increase in the demand for specialized tires designed to meet the unique requirements of electric vehicles. These tires must offer improved energy efficiency, given the emphasis on extending the driving range of electric two-wheelers.

Key Market Challenges

Penetration Of Low-Quality Tires

The Latin American two-wheeler tire market has been significantly influenced by the emergence of budget tire manufacturers entering the region. These companies provide affordable tire options, which has created competitive pressure on both global and local tire manufacturers. The availability of low-cost and lower-quality tires can pose safety risks, potentially leading to accidents and negatively affecting the reputation of two-wheeler manufacturers. Consequently, this may hinder the widespread adoption of two-wheelers in the region. To uphold safety standards, there is a need for cooperation between tire manufacturers and regulatory authorities to regulate the distribution of such tires while advocating for the use of high-quality and safer tire options.

Cost Centric Market

A notable challenge in the Latin America two-wheeler tire market stems from the volatility in tire manufacturing costs, primarily driven by restrictions imposed by several countries on the transportation of materials and components. Additionally, a significant portion of customers in the Latin American region gravitates toward budget-friendly and cost-effective tire options. Price-sensitive consumers frequently opt for more economical choices, creating obstacles for premium and high-quality tire markets. This exerts pressure on manufacturers to provide competitive pricing while upholding tire quality. Striking a balance between tire durability and affordability becomes a critical consideration for companies. These factors collectively contribute to a deceleration in the market's growth.

Fluctuating Manufacturing Costs

One of the primary challenges in the Latin America two-wheeler tire market is the volatility in manufacturing costs. This volatility is often attributed to restrictions imposed by many countries on the transport of materials and components. These restrictions can disrupt the supply chain and lead to fluctuations in production costs. Manufacturers

must navigate these hurdles while striving to maintain competitive pricing.

Preference for Budget-Friendly Options

Many consumers in the Latin American region tend to favor budget-friendly and affordable tire options. Price sensitivity is high, leading a significant portion of consumers to choose lower-cost tire models. This preference for affordability can hinder the demand for premium and high-quality tires, posing a challenge for tire manufacturers looking to cater to diverse consumer segments.

Price Competition and Margin Pressure

The strong preference for budget-friendly options places pressure on tire manufacturers to offer competitive prices. Maintaining profitability while meeting price-sensitive consumer demands can be challenging. Manufacturers must strike a delicate balance between affordability and quality to remain competitive in the market.

Regulatory Compliance

Ensuring compliance with regulatory standards is crucial for tire manufacturers, especially concerning safety and environmental regulations. Meeting these standards adds complexity to the manufacturing process and requires ongoing investments in research and development. Failure to comply with regulations can lead to legal consequences and damage a manufacturer's reputation.

Balancing Durability and Affordability

Achieving the right balance between tire durability and affordability is a significant challenge. Consumers seek tires that are both long-lasting and cost-effective. Tire manufacturers must invest in research and development to develop durable yet affordable tire solutions. This can be particularly challenging given the diverse road conditions and usage patterns in Latin America.

Key Market Trends

Focus on Green Tires and Environmental Sustainability

Environmental sustainability is a growing trend that positively impacts the Latin American two-wheeler tire market. The tire industry's evolution is heavily influenced by

technological advancements, with tire manufacturers increasingly focusing on producing high-efficiency tires. As these tires ultimately end up in landfills and contribute to soil degradation issues, there is a growing preference for sustainable tires across various industries, especially those with high carbon emissions. Consequently, tire manufacturers are actively developing innovative tire technologies that offer reduced rolling resistance. Moreover, the adoption of eco-friendly or 'green' tires is on the rise as energy consumption decreases and environmental awareness grows. The Latin American two-wheeler tire market incorporates a significant portion of these environmentally friendly tire options.

Growing Network of Both Major and New Players

The Latin American two-wheeler tire market is witnessing significant transformation due to the rapid expansion of both established and emerging players. The presence of major players, including renowned tire manufacturers, is growing within the Latin American market, intensifying competition. These established brands bring their wealth of experience, strong reputations, and financial resources to the region, posing challenges to local manufacturers and other international competitors. This heightened competition serves as a catalyst for tire companies to drive innovation, enhance product quality, and offer competitive pricing. Ultimately, consumers benefit from a broader array of choices. Concurrently, the entry of new players into the Latin American two-wheeler tire market contributes to market diversification. Emerging manufacturers, particularly from developing economies, may introduce cost-effective tire options, targeting specific consumer segments. This diversification fosters a dynamic and competitive landscape within the market.

Technological Advancements

The tire industry is witnessing significant technological advancements, particularly in the development of high-efficiency tires. Tire producers are investing in research and development to create tires that offer enhanced performance, better fuel efficiency, and reduced environmental impact. These innovations include improvements in tire materials, tread designs, and manufacturing processes. As technology continues to drive improvements, consumers can expect tires that provide better grip, handling, and durability.

Customization and Personalization

There is a growing trend toward customization and personalization in the two-wheeler

tire market. Consumers are seeking tires that align with their specific preferences and usage patterns. This trend is driving tire manufacturers to offer a wider variety of tire sizes, tread patterns, and designs. It also includes the development of specialized tires for different types of two-wheelers, such as motorcycles, scooters, and electric bikes. Personalization allows consumers to optimize their riding experience, whether it's for urban commuting, off-road adventures, or high-performance riding.

Preference for Radial Tires

Radial tires are gaining preference over bias tires in the Latin American two-wheeler market. Radial tires offer several advantages, including lower rolling resistance, improved fuel efficiency (resulting in fuel savings of 8-10%), and better traction. These benefits are contributing to the surge in demand for radial tires. Additionally, regulatory standards for radial tires are often easier for manufacturers to meet in many countries, further driving their adoption. Consumers appreciate the improved road contact, steering response, and overall driving comfort that radial tires provide.

Segmental Insights

By Vehicle Type

The vehicle type segment in the Latin America two-wheeler tire market encompasses a diverse range of two-wheeled vehicles, including motorcycles, and scooters. Motorcycles, with their versatility and wide-ranging applications, constitute a significant portion of this segment. They are favored for both daily commuting and recreational riding. Scooters, known for their compact design and fuel efficiency, cater to urban commuters seeking convenience. The emergence of electric bikes, driven by environmental concerns, contributes to the growth of this segment. Each vehicle type has unique tire requirements, leading to tire manufacturers offering a wide array of options to cater to the specific needs of these diverse two-wheeler categories.

By Demand Category

The demand category segment in the Latin America two-wheeler tire market primarily comprises two categories: original equipment manufacturer (OEM) and replacement. OEM tires are supplied directly to manufacturers for installation on new two-wheelers during the production process. These tires are designed to meet specific vehicle requirements. In contrast, the replacement segment involves the Replacement purchase of tires to replace worn-out or damaged ones on existing two-wheelers. The

replacement category holds a substantial share, driven by the need for periodic tire replacements due to wear and tear. It also offers consumers the flexibility to choose from a wide range of tire options to suit their preferences and requirements.

By Tire Construction Type

The tire construction type segment in the Latin America two-wheeler tire market encompasses two primary categories: bias and radial tires. Bias tires feature a construction where multiple layers of fabric cords run diagonally across the tire, providing stability and durability. They are cost-effective and excel in carrying heavy loads. In contrast, radial tires are constructed with fabric layers that run perpendicular to the tire's centerline, offering enhanced performance attributes such as reduced rolling resistance, improved fuel efficiency, and better traction. Radial tires are gaining popularity due to their superior handling and comfort, making them a preferred choice for many riders across Latin America.

By Country

The country segment in the Latin America two-wheeler tire market reflects the variations in demand and preferences across different nations within the region. Countries such as Brazil, Mexico, and Argentina are prominent markets due to their large populations and extensive use of two-wheelers for daily commuting. Brazil, in particular, stands out as a market leader with a significant share. Smaller nations like Colombia and Peru also contribute to the market's growth, driven by urbanization and increasing urban mobility needs. Each country exhibits unique economic conditions, regulatory environments, and consumer behaviors, influencing the demand for two-wheeler tires and shaping the regional dynamics of the market.

Country Insights

Brazil holds a commanding position in the Latin American two-wheeler tire market. Its prominence is a result of the country's vast population, significant urbanization, and the widespread use of motorcycles and scooters for daily commuting. The favorable economic conditions and ongoing infrastructure development projects further bolster the demand for two-wheeler tires in this region. Brazil's unique market dynamics make it a crucial hub for both local and global tire manufacturers.

Mexico, another influential player in the Latin American market, is experiencing rapid urbanization and a growing preference for two-wheelers as cost-effective transportation

solutions. Its proximity to the United States also plays a role in shaping the market, as global and regional tire manufacturers are investing in the Mexican market to meet the rising demand for two-wheeler tires. This trend underscores Mexico's significance as a key market within the region.

Argentina presents a robust market for two-wheeler tires, driven by urbanization and a preference for two-wheelers in its cities. The country's unique economic conditions and consumer behaviors contribute to its distinct market dynamics. Argentina's market is characterized by a growing demand for both motorcycles and scooters, fostering opportunities for tire manufacturers to cater to this evolving market landscape.

Colombia is emerging as a noteworthy market for two-wheeler tires, fueled by increasing urban mobility needs and a growing population. The country's urbanization trends, coupled with the need for efficient and affordable transportation, are propelling the demand for motorcycles and scooters. This, in turn, fuels the need for high-quality two-wheeler tires, creating opportunities for both local and global tire manufacturers.

Peru, although a smaller market compared to some of its neighbors, is experiencing steady growth in the two-wheeler tire segment. The country's urban areas are witnessing a rise in motorcycle and scooter usage as consumers seek practical and cost-effective transportation options. Peru's unique economic landscape and regulatory environment contribute to its specific market dynamics, making it an emerging market to watch within the Latin American region.

Key Market Players

Bridgestone Americas, Inc.

Rinaldi S/A Industria de Pneumaticos

Pirelli & C. S.p.A.

Michelin Group

Continental AG

Maxxis International GmbH

Maggion Industrias de Pneus e Maquinas Ltda

Pneus Technic

Kenda Rubber Industrial Co. Ltd.

Borilli Group

Report Scope:

In this report, the Latin America Two-Wheeler Tire Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Latin America Two-Wheeler Tire Market, By Vehicle Type

Motorcycles

Scooters

Latin America Two-Wheeler Tire Market, By Demand Category:

OEM

Replacement

Latin America Two-Wheeler Tire Market, By Tire Construction Type:

Radial

Bias

Latin America Two-Wheeler Tire Market, By Country:

Brazil

Colombia

Mexico

Argentina

Peru

Chile

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Latin America Two-Wheeler Tire Market.

Available Customizations:

Latin America Two-Wheeler Tire 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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