

Tire Chemicals Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Vehicle Type (Passenger Car, Light Commercial Vehicle, Medium & Heavy Commercial Vehicle, Two-Wheeler, Three-Wheeler, OTR), By Demand Category (OEM and Replacement), By Tire Construction Type (Radial and Bias), By Region and Competition

<https://marketpublishers.com/r/T14E48BCB79CEN.html>

Date: October 2023

Pages: 187

Price: US\$ 4,900.00 (Single User License)

ID: T14E48BCB79CEN

Abstracts

Global Tire Chemicals Market has valued at USD10.55 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.18% through 2028. Tire chemicals encompass a wide range of substances that are integral to the manufacturing process of tires. These chemicals play a crucial role in enhancing various aspects of tire performance, including toughness, resistance handling, obstruction handling, and grip. Among the different types of tire chemicals, there are those derived from natural sources such as natural rubber, as well as those that are synthetically produced like carbon black. Additionally, crude oil and other materials are utilized to offer optimal solutions for increased sturdiness, grip, and other essential elements of tires.

When it comes to tire composition, various materials come into play. These include regular elastic, engineered elastic, manufactured material, carbon black, fillers, stearic corrosive, zinc oxide, plasticizers, gas pedals, and antioxidants. While both natural rubber and synthetic rubber are the primary components of tires, each type of tire chemical plays a significant role in the tire production process. The selection of raw materials for tire manufacturing is contingent upon the type of tire being produced and its intended usage. The careful consideration and utilization of these tire chemicals

result in the creation of high-quality tires that meet the diverse needs of different applications.

Key Market Drivers

Rise in Automotive Production

Automotive production and the tire chemicals market are intrinsically linked. For every vehicle produced, a set of tires is required, and each tire utilizes a complex combination of chemicals to ensure its durability, performance, and safety. These chemicals include natural rubber, synthetic rubber, carbon black, silica, and zinc oxide, among others. Each chemical plays a crucial role in enhancing different aspects of tire performance, such as traction, resistance to wear, fuel efficiency, and overall durability.

In recent years, the global automotive production has witnessed a consistent rise, with emerging economies like China, India, and Brazil leading the surge. Several factors have contributed to this increase, including growing populations, rising disposable incomes, and rapid urbanization. Moreover, advancements in automotive technology and the increasing popularity of electric vehicles have further stimulated vehicle production. As a result, the demand for tire chemicals has experienced a corresponding boost.

Looking ahead, the global tire chemicals market is expected to continue its upward trajectory. The ongoing growth in automotive production, combined with advancements in tire technology and a greater emphasis on sustainable and eco-friendly tire solutions, will likely drive the demand for tire chemicals even higher. Manufacturers are investing in research and development to develop innovative tire chemical formulations that not only meet the stringent performance requirements but also align with environmental sustainability goals.

In conclusion, the rise in automotive production worldwide serves as a significant driver of the global tire chemicals market. As vehicle manufacturing continues to grow, the demand for the chemicals used in tire production is expected to increase correspondingly. This trend underscores the vital role of the automotive industry in shaping the global tire chemicals market and indicates a promising outlook for the future. With ongoing advancements and a focus on sustainability, the tire chemicals market is poised for continued growth and innovation.

Surge in Technological Advancements

The global tire chemicals market is currently undergoing a significant transformation, driven primarily by rapid technological advancements. As the tire industry continues to evolve, these advancements are playing a crucial role in enhancing the performance, safety, and sustainability of tires.

The tire industry has always been at the forefront of innovation, constantly seeking ways to improve product quality and performance. In today's landscape, technological advancements have become a vital driver in the tire chemicals market. These advancements encompass a wide range of developments, from the creation of novel rubber compounds and chemical additives to the implementation of cutting-edge manufacturing processes.

One of the key areas of innovation in the tire industry lies in the development of new rubber compounds and chemical additives. These innovations aim to improve various aspects of tire performance, including traction, durability, fuel efficiency, and resistance to wear and tear. For instance, the utilization of silica as a reinforcing filler in tire rubber compounds has resulted in tires with lower rolling resistance. This, in turn, can significantly enhance vehicle fuel efficiency, an important consideration in today's environmentally conscious world.

Technological advancements have also revolutionized the manufacturing processes within the tire industry. Modern manufacturing technologies, such as computer-aided design (CAD) and computer-aided manufacturing (CAM), have enabled more precise and efficient production of tires. Furthermore, the integration of automation and robotics in tire manufacturing has further elevated production efficiency and product consistency.

These remarkable technological advancements have had a profound impact on the global tire chemicals market. The development of new rubber compounds and chemical additives has led to an increased demand for a wide array of tire chemicals. Similarly, advanced manufacturing processes have spurred the need for high-quality, specialized chemicals capable of meeting the stringent requirements of these processes.

Looking ahead, the global tire chemicals market is expected to continue its growth trajectory. The ongoing technological advancements in the tire industry, coupled with increasing environmental concerns and regulations, are likely to drive further innovations in tire chemicals. These factors, combined with the ever-growing automotive industry, point towards a promising future for the global tire chemicals market.

In conclusion, the surge in technological advancements stands as a major driver of the global tire chemicals market. As the tire industry continues to innovate and evolve, the demand for high-quality, performance-enhancing tire chemicals is set to rise correspondingly. This trend underscores the crucial role of technology in shaping the global tire chemicals market and indicates a bright outlook for the future, characterized by continuous growth and advancement.

Key Market Challenges

Volatility in Prices of Raw Materials

The global tire chemicals market is currently facing a significant challenge: the volatility in the prices of raw materials. These raw materials play a crucial role in the tire industry, with key chemicals like natural rubber, synthetic rubber, carbon black, silica, and zinc oxide contributing to various aspects of tire performance. However, the prices of these raw materials are subject to fluctuations influenced by factors such as changes in supply and demand, geopolitical issues, environmental regulations, and global economic conditions.

For instance, natural disasters can disrupt the supply of natural rubber, leading to price hikes. Similarly, stricter environmental regulations can increase the production costs of certain chemicals, which may be passed on to the consumer in the form of higher prices. This unpredictability in raw material prices poses a significant challenge for the global tire chemicals market, as manufacturers find it difficult to forecast costs and plan budgets, potentially impacting profitability.

Moreover, sudden increases in raw material prices can result in higher production costs, which may ultimately lead to increased tire prices. This, in turn, can potentially affect demand, particularly in price-sensitive markets where consumers may seek cheaper alternatives.

Given these circumstances, it becomes crucial for the tire industry to closely monitor and manage raw material prices, seeking ways to mitigate the impact of fluctuations and maintain stability. Additionally, exploring alternative materials and sources, investing in research and development, and fostering partnerships within the supply chain can help create a more resilient and sustainable market for tire chemicals.

In summary, the tire industry's heavy reliance on various chemicals makes it susceptible to the volatility of raw material prices. Understanding the factors influencing these

fluctuations and implementing strategies to manage them effectively is essential for maintaining stability, profitability, and meeting the demands of the market.

Key Market Trends

Increased Use of High-Performance Tires

The global tire chemicals market is currently witnessing a significant trend: the increased use of high-performance tires. High-performance tires, known for their superior speed capabilities, grip, and handling, are becoming increasingly popular among consumers. These tires are designed to provide exceptional performance on both dry and wet surfaces, ensuring optimal traction and safety for drivers. With their advanced rubber compounds and chemical additives, high-performance tires offer enhanced durability, allowing for extended tread life and reduced rolling resistance.

Moreover, the demand for high-performance tires is not limited to sports and luxury vehicles. As consumer preferences shift towards vehicles that offer a balance between performance and fuel efficiency, high-performance tires are being increasingly sought after for everyday use. The innovative design and construction of these tires enable improved fuel economy, contributing to reduced carbon emissions and a greener driving experience.

As the popularity of high-performance tires continues to grow, the tire chemicals market is experiencing a surge in demand for specialized compounds and additives.

Manufacturers are investing in research and development to create cutting-edge tire chemicals that can further enhance the performance and safety features of these tires. This includes the development of novel rubber polymers, silica-based compounds for improved wet traction, and chemical additives that enhance heat dissipation and reduce rolling resistance.

Additionally, the tire chemicals market is also influenced by the ongoing trend towards eco-friendly materials in tire production. With increasing environmental concerns and regulations, tire manufacturers are incorporating bio-based and sustainable materials into the production of high-performance tires. This not only aligns with the global sustainability goals but also creates new opportunities for tire chemical manufacturers to develop eco-friendly alternatives that meet the stringent performance requirements of high-performance tires.

Looking ahead, the global tire chemicals market is poised to benefit from the continued

growth in the high-performance tire sector. Factors such as population growth in emerging markets, increased original equipment fitments, and the need for improved vehicle fuel efficiency are expected to drive the demand for high-performance tires. Furthermore, advancements in tire technology, such as the integration of smart sensors and self-healing capabilities, will drive further innovations in tire chemicals, creating a dynamic landscape for the industry.

In conclusion, the increased use of high-performance tires represents a significant trend in the global tire chemicals market. As these tires gain popularity among consumers and find applications beyond sports and luxury vehicles, the demand for specialized tire chemicals is expected to rise correspondingly. This trend underscores the pivotal role of high-performance tires in shaping the tire chemicals market and points towards a promising future for the industry, driven by innovation, sustainability, and the evolving needs of consumers.

Segmental Insights

Vehicle Type Insights

Based on the category of vehicle type, the passenger car segment emerged as the dominant player in the global market for Tire Chemicals in 2022. Firstly, there is a noticeable and significant rapid increase in passenger automobile sales, particularly in emerging economies. This surge in vehicle sales, driven by factors such as rising disposable incomes and improved transportation infrastructure, naturally leads to a higher demand for tires. As more individuals purchase cars, the need for reliable and durable tires becomes paramount, thereby further driving the demand for tire chemicals.

Secondly, advancements in rubber chemistry and tire design are also contributing factors to the increasing demand for tire chemicals. As tire manufacturers strive to enhance the performance, safety, and lifespan of passenger car tires, they are constantly seeking innovative tire chemicals that can deliver these benefits. This includes the development of specialized compounds and additives that improve traction, reduce rolling resistance, and increase overall durability.

Additionally, the growth of the automotive industry and the continuous increase in vehicle production are key drivers of the tire market. The rise in replacement demand, fueled by aging vehicle fleets and wear and tear, further amplifies the need for tires. Moreover, the expanding penetration of electric vehicles, with their unique tire requirements, adds another layer of demand for specialized tire chemicals.

In summary, the interplay of factors such as increasing automobile sales, advancements in rubber chemistry, tire design improvements, and the growth of the automotive industry collectively contribute to the rising demand for tire chemicals. This trend is expected to continue as the global transportation landscape evolves and demands higher-performing and more sustainable tires.

Tire Construction Type Insights

The radial segment is projected to experience rapid growth during the forecast period. Firstly, significant advancements in radial tire production techniques have revolutionized the tire industry, allowing radial tires to steadily gain a larger market share. The innovative technology behind radial tires involves the use of multiple layers of high-quality fabric with cords that run radially around the tire, providing exceptional strength and flexibility. This unique construction makes radial tires exceptionally durable, capable of withstanding various road conditions, and delivering superior performance compared to their counterparts.

Secondly, the advantages offered by radial tires over bias tires are numerous and impactful. Notably, radial tires exhibit improved fuel efficiency, allowing drivers to maximize their mileage and reduce overall fuel consumption. Moreover, due to their robust design, radial tires boast longer tread life, ensuring that they can endure extended periods of use before requiring replacement. Additionally, radial tires deliver enhanced handling, providing drivers with enhanced control, stability, and responsiveness on the road. These remarkable benefits have made radial tires a highly favored choice among consumers, driving up demand and subsequently increasing the need for the specialized chemicals used in their manufacturing process.

Thirdly, specific segments within the tire market, such as the Truck Bus Radial (TBR) tire market and the Radial Agricultural Tire Market, are experiencing remarkable growth, further contributing to the widespread dominance of radial tires in the tire chemicals market. The increasing demand for radial tires in these specific markets is driven by their exceptional performance and durability, which are essential for heavy-duty applications and demanding terrains. As a result, manufacturers are focusing their efforts on catering to the unique requirements of these markets, thereby propelling the expansion of radial tire production and subsequently fueling the demand for tire chemicals.

By continuously embracing innovation and responding to the evolving needs of

consumers, radial tires have solidified their position as the preferred choice in the tire industry, cementing their dominance in the tire chemicals market.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Tire Chemicals Market in 2022, holding the largest market share in terms of value. The rapid economic growth in the Asia Pacific region, particularly in countries such as China and India, has led to a significant surge in vehicle ownership. This increased vehicle ownership has resulted in a substantial rise in the demand for tires. As a consequence, there is a corresponding higher demand for tire chemicals, which are essential for tire production and maintenance.

Additionally, the Asia Pacific region witnesses a continuous and robust demand for tire replacements. This sustained demand for tire replacements further fuels the need for tire chemicals, as they play a crucial role in ensuring the durability and performance of tires.

Moreover, the Asia Pacific region, including countries like China, India, and Japan, has experienced a remarkable increase in tire production. The steady growth in tire production naturally leads to a higher demand for tire chemicals, as these chemicals are vital in the manufacturing process and contribute to the quality and safety of the tires produced.

The combination of rapid economic growth, increasing vehicle ownership, tire replacements, and tire production in the Asia Pacific region underscores the growing importance of tire chemicals in meeting the demands of this dynamic market.

Recent Developments

Origin Materials, a leading sustainable materials company, has recently joined forces with Mitsubishi Chemical Holdings Group, a global powerhouse in the chemical industry, to embark on an exciting journey of developing advanced carbon-negative materials specifically tailored for the tire manufacturing sector. By leveraging their combined expertise, this groundbreaking partnership aims to revolutionize the production of high-performance tire chemicals by utilizing renewable feedstocks. The ultimate goal? To significantly reduce the environmental footprint associated with tire production, paving the way for a greener and more sustainable future.

Key Market Players

Eastman Chemical Co

Cabot Corporation

Evonik Industries AG

Jiangxi Black Cat Carbon Black Inc

Birla Carbon India Private Limited

ExxonMobil Corporation

Emery Oleochemicals LLC

Phillips Carbon Black Limited

Lanxess AG

Orion Engineered Carbon S.A

Report Scope:

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

Tire Chemicals Market, By Vehicle Type:

Passenger Car

Light Commercial Vehicle

Medium & Heavy Commercial Vehicle

Two-Wheeler

Three-Wheeler

OTR

Tire Chemicals Market, By Demand Category:

OEM

Replacement

Tire Chemicals Market, By Tire Construction Type:

Radial

Bias

Tire Chemicals 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Tire Chemicals Market.

Available Customizations:

Global Tire Chemicals 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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