

**Connected Tires Market by Vehicle Type, Component, Rim Size (12-17 Inches, 18-22 Inches, More than 22 Inches), Sales Channel (OEM, Aftermarket), Propulsion (Electric, ICE), Offering (Hardware, Software) and Region - Global Forecast to 2028**

Market Report | 2023-06-05 | 218 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global connected tires market size is projected to grow from USD 4 million in 2023 to USD 54 million by 2028, at a CAGR of 67.1%. Increasing demand for safety and the growing vehicle connectivity trend are poised to impact the connected tire market profoundly. The convergence of these factors is expected to drive significant changes in the industry. Growing emphasis on safety will fuel the demand for connected tires equipped with real-time monitoring capabilities, including tire pressure, temperature, and tread wear. This information would be seamlessly transmitted to the vehicle's onboard systems, empowering drivers with timely alerts and enabling proactive measures to prevent accidents. Such factors will lead to an increase in demand for connected tyres in the coming years. Further, the rise of connected and autonomous vehicles (CAVs) will increase the demand of connected mobility ecosystems. Connected tires play a vital role within these ecosystems by offering valuable data that various stakeholders, including fleet operators, ride-sharing platforms, and smart city infrastructure, can harness.

"The 12-17 Inches segment will lead the market during forecast period"

The market for the 12-17 inches segment is expected to be driven by the increasing demand for advanced safety features in vehicles, including tire monitoring systems. The growth of electric vehicles is also expected to fuel demand for connected tires, as they require more precise and efficient monitoring systems. The trend of connected cars is a significant driver of growth, creating a need for real-time vehicle data analysis and monitoring. Connected tire systems, such as the Goodyear TPMS and Continental's ContiConnect, offer real-time monitoring of tire pressure, temperature, and other parameters, improving safety and performance. The rise of shared mobility services and ride-sharing platforms is expected to drive demand for advanced tire management solutions.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

"EV segment to witness a faster growth during the forecast period"

The electric propulsion subsegment of the connected tires market is expected to witness significant growth in the coming years due to the increasing adoption of electric vehicles. Electric vehicles tend to have heavier batteries and generate more torque, which can strain the tires more. As a result, tire pressure and temperature monitoring are critical for ensuring optimal performance and safety. Several tire manufacturers have developed connected tire solutions specifically for electric vehicles. For example, Michelin's Connected Road concept uses sensors embedded in the road surface to provide real-time information to drivers about road conditions, traffic, and weather, enabling them to make better decisions and reduce energy consumption. As more consumers shift toward sustainable modes of transportation, demand for advanced tire monitoring and maintenance solutions that can improve vehicle performance, safety, and efficiency is expected to rise. The trend of smart cities and connected infrastructure is also expected to fuel demand for advanced tire monitoring systems in the electric vehicle segment.

"North America will lead the connected tyre market in the short future"

The growing demand for safety and the increasing willingness of consumers to adopt new technologies is expected to drive the growth of the connected tires market in North America. The market is expected to witness significant growth in the coming years due to the increasing adoption of advanced tire technologies and the increasing demand for real-time tire monitoring solutions. The growth of the market is expected to be driven by the increasing adoption of luxury vehicles, which require specialized tires optimized for their unique needs. Overall, the connected tires market in North America is poised for significant growth in the coming years, driven by technological advancements, government mandates, and increasing consumer demand for safety and convenience.

Consumers are becoming increasingly willing to adopt new technologies in their vehicles to improve safety. This trend is reflected in the growing popularity of connected tires, which allow for real-time monitoring of tire performance and safety through sensors embedded in the tire. Michelin is one of the companies leading the way in this space with its Michelin Connected Technologies platform, which provides real-time data and analysis of tire performance to drivers and fleet managers. Moreover, recent developments in the connected tires market in the US include the introduction of new technologies, such as RFID chips, which offer improved accuracy and security compared to traditional TPMS. Bridgestone, Goodyear, Michelin, and Pirelli are some of the leading players in the connected tires market in US, investing heavily in research and development to offer innovative solutions for the changing needs of customers.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

-□By Company Type: Tier I - 67%, Others - 9%, and OEMs - 24%

-□By Designation: C Level Executives - 33%, Directors - 52%, and Others - 15%

-□By Region: North America - 28%, Europe - 38%, Asia Pacific - 32%, Rest of the World - 2%

The Connected tyre market is dominated by major charging providers including Bridgestone (Japan), Michelin (France), Goodyear (US), Continental (Germany), and Pirelli (Italy) among others in the Connected tyre market.

Research Coverage:

This research report categorizes Connected tyre market by Vehicle Type (Passenger Cars, Commercial Vehicles), Component (TPMS, Accelerometer, Strain Gauge Sensor, RFID Chips, Other Sensors), Rim Size (12-17 Inches, 18-22 Inches, More than 22 Inches), Sales Channel (OEM, Aftermarket), Propulsion (ICE, Electric), Offering (Hardware, Software) and Region (Asia Pacific, Europe, North America and Rest of the World).

The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the Connected tyre market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; Contracts, partnerships, agreements. new product & service launches, mergers and acquisitions, and recent developments associated with the Connected tyre market. Competitive analysis of upcoming startups in the Connected tyre market ecosystem is covered in this report.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall Connected tyre market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

-□Analysis of key drivers (Increased demand for vehicle safety, Technological advancements Regulations for TPMS and safety monitoring), restraints (High cost of connected tire technology, Data privacy and cybersecurity, concerns), opportunities (Increased acceptance of connected mobility, Increased efficiency, Increased investment for autonomous vehicles), and challenges (Lack of standardization, Limited acceptance by consumers) influencing the growth of the Connected tyre market

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Connected tyre market

-□Market Development: Comprehensive information about lucrative markets - the report analyses the Connected tyre market across varied regions

-□Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Connected tyre market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Bridgestone (Japan), Michelin (France), Goodyear (US), Continental (Germany), and Pirelli (Italy) among others in the Connected tyre market

## **Table of Contents:**

1□INTRODUCTION□	26
1.1□STUDY OBJECTIVES□	26
1.2□MARKET DEFINITION□	27
TABLE 1□CONNECTED TIRES MARKET DEFINITION, BY SALES CHANNEL□	27
TABLE 2□CONNECTED TIRES MARKET DEFINITION, BY VEHICLE TYPE□	27
TABLE 3□CONNECTED TIRES MARKET DEFINITION, BY RIM SIZE□	28
TABLE 4□CONNECTED TIRES MARKET DEFINITION, BY COMPONENT□	28
TABLE 5□CONNECTED TIRES MARKET DEFINITION BY PROPULSION TYPE□	29
TABLE 6□CONNECTED TIRES MARKET DEFINITION, BY OFFERING□	29
1.2.1□INCLUSIONS AND EXCLUSIONS□	29
TABLE 7□INCLUSIONS AND EXCLUSIONS□	29
1.3□MARKET SCOPE□	30
FIGURE 1□MARKETS COVERED□	30
1.3.1□REGIONS COVERED□	31
1.3.2□YEARS CONSIDERED□	31
1.4□CURRENCY CONSIDERED□	31
TABLE 8□CURRENCY EXCHANGE RATES□	32
1.5□STAKEHOLDERS□	32
1.6□RECESSION IMPACT□	32
2□RESEARCH METHODOLOGY□	33

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.1	RESEARCH DATA	33
	FIGURE 2	CONNECTED TIRES MARKET: RESEARCH DESIGN
	FIGURE 3	RESEARCH DESIGN MODEL
2.1.1	SECONDARY DATA	34
2.1.1.1	Key secondary sources for connected tires market	35
2.1.1.2	Key data from secondary sources	36
2.1.2	PRIMARY DATA	36
2.1.2.1	Primary interviews - demand and supply sides	37
2.1.2.2	Key industry insights and breakdown of primary interviews	37
	FIGURE 4	KEY INDUSTRY INSIGHTS
	FIGURE 5	BREAKDOWN OF PRIMARY INTERVIEWS
2.1.2.3	List of primary participants	38
2.2	MARKET SIZE ESTIMATION	39
	FIGURE 6	RESEARCH METHODOLOGY: HYPOTHESIS BUILDING
2.2.1	BOTTOM-UP APPROACH	41
	FIGURE 7	CONNECTED TIRES MARKET: BOTTOM-UP APPROACH
2.2.2	TOP-DOWN APPROACH	41
	FIGURE 8	TOP-DOWN APPROACH: CONNECTED TIRES MARKET
	FIGURE 9	CONNECTED TIRES: MARKET ESTIMATION NOTES
2.3	RECESSION IMPACT ANALYSIS	42
	FIGURE 10	CONNECTED TIRES MARKET: RESEARCH DESIGN AND METHODOLOGY - DEMAND SIDE
2.4	DATA TRIANGULATION	44
	FIGURE 11	DATA TRIANGULATION METHODOLOGY
2.5	FACTOR ANALYSIS	45
	FIGURE 12	FACTOR ANALYSIS: CONNECTED TIRES MARKET
2.5.1	FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDES	46
2.6	RESEARCH ASSUMPTIONS	47
2.7	RESEARCH LIMITATIONS	48
3	EXECUTIVE SUMMARY	49
	FIGURE 13	CONNECTED TIRES MARKET: MARKET OVERVIEW
	FIGURE 14	CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)
	FIGURE 15	HARDWARE SEGMENT ESTIMATED TO LEAD CONNECTED TIRES MARKET IN 2023
	FIGURE 16	KEY PLAYERS IN CONNECTED TIRES MARKET
	FIGURE 17	PASSENGER CARS SEGMENT TO HAVE HIGHEST MARKET SHARE IN CONNECTED TIRES MARKET IN 2023
4	PREMIUM INSIGHTS	54
4.1	ATTRACTIVE OPPORTUNITIES IN CONNECTED TIRES MARKET	54
	FIGURE 18	INCREASING DEMAND FOR SMART AND CONNECTED VEHICLES TO BOOST MARKET
4.2	CONNECTED TIRES MARKET, BY PROPULSION	54
	FIGURE 19	ELECTRIC SEGMENT EXPECTED TO HAVE FASTEST CAGR DURING FORECAST PERIOD
4.3	CONNECTED TIRES MARKET, BY VEHICLE TYPE	55
	FIGURE 20	PASSENGER CARS TO LEAD MARKET DURING FORECAST PERIOD
4.4	CONNECTED TIRES MARKET, BY RIM SIZE	55
	FIGURE 21	12-17 INCHES RIM SIZE TO HAVE HIGHEST GROWTH DURING FORECAST PERIOD
4.5	CONNECTED TIRES MARKET, BY OFFERING	56
	FIGURE 22	SOFTWARE SEGMENT TO WITNESS SIGNIFICANT GROWTH DURING FORECAST PERIOD
4.6	CONNECTED TIRES MARKET, BY COMPONENT	56
	FIGURE 23	TPMS AND RFID CHIPS TO REGISTER FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

4.7	CONNECTED TIRES MARKET, BY REGION	57
FIGURE 24	ASIA PACIFIC ACCOUNTED FOR LARGEST MARKET SHARE IN 2022	57
?		
5	MARKET OVERVIEW	58
5.1	INTRODUCTION	58
5.2	MARKET DYNAMICS	59
FIGURE 25	CONNECTED TIRES MARKET: MARKET DYNAMICS	59
5.2.1	DRIVERS	60
FIGURE 26	DRIVING FACTORS OF CONNECTED TIRES MARKET	60
5.2.2	RESTRAINTS	61
FIGURE 27	RESTRAINING FACTORS OF CONNECTED TIRES MARKET	61
5.2.3	OPPORTUNITIES	63
FIGURE 28	OPPORTUNITIES IN CONNECTED TIRES MARKET	63
5.2.4	CHALLENGES	64
FIGURE 29	CHALLENGING FACTORS OF CONNECTED TIRES MARKET	64
TABLE 9	CONNECTED TIRES MARKET: IMPACT OF MARKET DYNAMICS	65
5.3	CONNECTED TIRES MARKET ECOSYSTEM	66
FIGURE 30	CONNECTED TIRES MARKET: ECOSYSTEM ANALYSIS	66
5.3.1	TIRE MANUFACTURERS	66
5.3.2	TECHNOLOGY PROVIDERS	66
5.3.3	IOT PLATFORM PROVIDERS	66
5.3.4	AUTOMOTIVE OEMS	66
5.3.5	CONNECTIVITY PROVIDERS	66
TABLE 10	CONNECTED TIRES MARKET: ROLE OF COMPANIES IN ECOSYSTEM	67
5.4	SUPPLY CHAIN ANALYSIS	68
FIGURE 31	SUPPLY CHAIN ANALYSIS OF CONNECTED TIRES MARKET	68
5.5	PRICING ANALYSIS	69
TABLE 11	CONNECTED TIRES COST SUMMARY	69
TABLE 12	CONNECTED TIRES COST, BY VEHICLE TYPE	69
5.6	PATENT ANALYSIS	70
FIGURE 32	NUMBER OF PUBLISHED PATENTS (2012-2022)	70
5.6.1	LEGAL STATUS OF PATENTS	70
FIGURE 33	LEGAL STATUS OF PATENTS FILED FOR CONNECTED TIRES	70
TABLE 13	IMPORTANT PATENT REGISTRATIONS RELATED TO CONNECTED TIRES MARKET	71
5.7	CASE STUDIES	74
5.7.1	CASE STUDY 1: SMART TIRES IOT PRODUCT DEVELOPMENT	74
5.7.2	CASE STUDY 2: BUILDING BETTER TIRES WITH AI	74
5.7.3	CASE STUDY 3: TIRESMATIC CLOUD SYSTEM	75
5.7.4	CASE STUDY 4: CONTINENTAL AND HEWLETT PACKARD ENTERPRISE (HPE)	75
5.7.5	CASE STUDY 5: PIRELLI AND ERICSSON	75
5.8	TECHNOLOGY ANALYSIS	76
5.8.1	5G CONNECTIVITY	76
5.8.2	IOT INTEGRATION	77
FIGURE 34	MICROSOFT TIRE MONITORING SYSTEM	77
5.8.3	ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING	78
FIGURE 35	AUTOMATED TIRE INFORMATION GATHERING SYSTEM FOR BUSES AND TRUCKS	78
5.8.4	AUGMENTED REALITY	79

## FIGURE 36 FALKEN TIRES AUGMENTED REALITY 79

### 5.9 TRADE ANALYSIS 80

#### 5.9.1 IMPORT DATA 80

TABLE 14 US: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 80

TABLE 15 MEXICO: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 80

TABLE 16 CHINA: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 80

TABLE 17 JAPAN: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 81

TABLE 18 INDIA: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 81

TABLE 19 GERMANY: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 81

TABLE 20 FRANCE: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 82

TABLE 21 SPAIN: PNEUMATIC TIRE IMPORTS SHARE, BY COUNTRY (VALUE %) 82

#### 5.9.2 EXPORT DATA 82

TABLE 22 US: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 82

TABLE 23 CHINA: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 83

TABLE 24 JAPAN: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 83

TABLE 25 INDIA: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 83

TABLE 26 GERMANY: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 84

TABLE 27 FRANCE: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 84

TABLE 28 SPAIN: PNEUMATIC TIRE EXPORTS SHARE, BY COUNTRY (VALUE %) 84

### 5.10 REGULATORY FRAMEWORK 85

#### 5.10.1 NORTH AMERICA 85

#### 5.10.2 EUROPE 85

#### 5.10.3 ASIA PACIFIC 85

#### 5.10.4 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS, BY REGION 86

TABLE 29 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 86

TABLE 30 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 87

TABLE 31 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 88

### 5.11 TRENDS AND DISRUPTIONS 89

FIGURE 37 CONNECTED TIRES MARKET: TRENDS AND DISRUPTIONS 89

#### 5.12 SOLUTION COMPARISON BY LEADING PLAYERS 90

#### 5.13 MACROECONOMIC INDICATORS 91

##### 5.13.1 GDP TRENDS AND FORECAST FOR MAJOR ECONOMIES 91

TABLE 32 GDP TRENDS AND FORECAST BY MAJOR ECONOMIES, 2019-2026 (USD BILLION) 91

#### 5.14 KEY STAKEHOLDERS AND BUYING CRITERIA 91

##### 5.14.1 PASSENGER CARS 91

##### 5.14.2 COMMERCIAL VEHICLES 92

##### 5.14.3 KEY STAKEHOLDERS IN BUYING PROCESS 92

FIGURE 38 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP APPLICATIONS 92

TABLE 33 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP APPLICATIONS (%) 92

##### 5.14.4 BUYING CRITERIA 93

FIGURE 39 KEY BUYING CRITERIA FOR TOP APPLICATIONS 93

TABLE 34 KEY BUYING CRITERIA FOR TOP APPLICATIONS 93

##### 5.14.5 ROI ANALYSIS 94

TABLE 35 ASSUMPTIONS: YEAR 1 94

TABLE 36 POTENTIAL BENEFITS: YEAR 1 94

TABLE 37 ROI CALCULATION: YEAR 1 94

### 5.15 KEY CONFERENCES AND EVENTS IN 2023 AND 2024 95

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 38	CONNECTED TIRES MARKET: DETAILED LIST OF CONFERENCES AND EVENTS	95
5.16	CONNECTED TIRES MARKET SCENARIO (2023-2028)	96
FIGURE 40	CONNECTED TIRES MARKET - FUTURE TRENDS AND SCENARIOS, 2023-2028 (USD MILLION)	96
5.16.1	MOST LIKELY SCENARIO	96
TABLE 39	MOST LIKELY SCENARIO, BY REGION, 2023-2028 (USD MILLION)	96
5.16.2	OPTIMISTIC SCENARIO	97
TABLE 40	OPTIMISTIC SCENARIO, BY REGION, 2023-2028 (USD MILLION)	97
5.16.3	PESSIMISTIC SCENARIO	97
TABLE 41	PESSIMISTIC SCENARIO, BY REGION, 2023-2028 (USD MILLION)	97
6	CONNECTED TIRES MARKET, BY RIM SIZE	98
6.1	INTRODUCTION	99
TABLE 42	CONNECTED TIRES MARKET, BY RIM SIZE, 2019-2022 (THOUSAND UNITS)	99
TABLE 43	CONNECTED TIRES MARKET BY RIM SIZE, 2023-2028 (THOUSAND UNITS)	99
FIGURE 41	MORE THAN 22 INCHES SEGMENT TO DOMINATE RIM SIZE MARKET DURING FORECAST PERIOD	100
6.2	12-17 INCHES	100
6.2.1	INCORPORATION OF NEW TECHNOLOGIES FOR BETTER PRODUCTIVITY	100
TABLE 44	12-17 INCHES: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	101
TABLE 45	12-17 INCHES: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	101
6.3	18-22 INCHES	101
6.3.1	ENABLES BETTER PERFORMANCE AND HANDLING AT HIGHER SPEEDS FOR SUVs, SPORTS CARS, AND OTHERS	101
TABLE 46	18-22 INCHES: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	102
TABLE 47	18-22 INCHES: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	102
6.4	MORE THAN 22 INCHES	102
6.4.1	INCREASED USAGE IN COMMERCIAL AND HEAVY-DUTY VEHICLES	102
TABLE 48	MORE THAN 22 INCHES: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	103
TABLE 49	MORE THAN 22 INCHES: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	103
6.5	KEY PRIMARY INSIGHTS	103
7	CONNECTED TIRES MARKET, BY PROPULSION	104
7.1	INTRODUCTION	105
TABLE 50	CONNECTED TIRES MARKET, BY PROPULSION TYPE, 2019-2022 (THOUSAND UNITS)	105
TABLE 51	CONNECTED TIRES MARKET, BY PROPULSION TYPE, 2023-2028 (THOUSAND UNITS)	105
FIGURE 42	ELECTRIC SEGMENT TO BE DOMINANT DURING FORECAST PERIOD (2023-2028)	106
7.2	ELECTRIC	106
7.2.1	SUSTAINABLE AND ECO-FRIENDLY SOLUTION	106
TABLE 52	ELECTRIC: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	106
TABLE 53	ELECTRIC: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	107
7.3	ICE	107
7.3.1	DEVELOPMENT OF NEW CONNECTED TIRE TECHNOLOGIES TO ENHANCE FUEL EFFICIENCY	107
TABLE 54	ICE: CONNECTED TIRES MARKET BY REGION, 2019-2022 (THOUSAND UNITS)	107
TABLE 55	ICE: CONNECTED TIRES MARKET BY REGION, 2023-2028 (THOUSAND UNITS)	108
7.4	KEY PRIMARY INSIGHTS	108
8	CONNECTED TIRES MARKET, BY SALES CHANNEL	109
8.1	INTRODUCTION	109
8.2	OEM	110
8.3	AFTERMARKET	110
9	CONNECTED TIRES MARKET, BY VEHICLE TYPE	112
9.1	INTRODUCTION	113

FIGURE 43	CONNECTED TIRES MARKET, BY VEHICLE TYPE, 2023-2028	113
TABLE 56	CONNECTED TIRES MARKET, BY VEHICLE TYPE, 2019-2022 (THOUSAND UNITS)	114
TABLE 57	CONNECTED TIRES MARKET, BY VEHICLE TYPE, 2023-2028 (THOUSAND UNITS)	114
9.2	PASSENGER CARS	114
9.2.1	INTEGRATION OF AI AND ML FOR BETTER RESULTS	114
TABLE 58	PASSENGER CARS: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	115
TABLE 59	PASSENGER CARS: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	115
9.3	COMMERCIAL VEHICLES	116
9.3.1	NEED FOR ENHANCED SAFETY AND EFFICIENCY	116
TABLE 60	COMMERCIAL VEHICLES: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	116
TABLE 61	COMMERCIAL VEHICLES: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	116
9.4	KEY INDUSTRY INSIGHTS	117
10	CONNECTED TIRES MARKET, BY OFFERING	118
10.1	INTRODUCTION	119
TABLE 62	CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	119
TABLE 63	CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	119
FIGURE 44	SOFTWARE PROJECTED TO REGISTER HIGHER RATE DURING FORECAST PERIOD	120
10.2	SOFTWARE	120
10.2.1	INVESTMENTS IN CLOUD-BASED PLATFORMS FOR REAL-TIME DATA ANALYSIS AND TIRE MONITORING	120
TABLE 64	SOFTWARE BY COMPANY NAMES	120
TABLE 65	SOFTWARE CONNECTED TIRES MARKET, BY REGION, 2019-2022 (USD MILLION)	121
TABLE 66	SOFTWARE CONNECTED TIRES MARKET, BY REGION, 2023-2028 (USD MILLION)	121
10.3	HARDWARE	122
10.3.1	R&D INVESTMENTS IN NEXT-GENERATION CONNECTED TIRES	122
TABLE 67	HARDWARE CONNECTED TIRES MARKET, BY REGION, 2019-2022 (USD MILLION)	122
TABLE 68	HARDWARE CONNECTED TIRES MARKET, BY REGION, 2023-2028 (USD MILLION)	122
10.4	KEY PRIMARY INSIGHTS	123
11	CONNECTED TIRES MARKET, BY COMPONENT	124
11.1	INTRODUCTION	125
TABLE 69	CONNECTED TIRES MARKET, BY COMPONENT, 2019-2022 (THOUSAND UNITS)	125
TABLE 70	CONNECTED TIRES MARKET, BY COMPONENT, 2023-2028 (THOUSAND UNITS)	125
FIGURE 45	TPMS AND RFID CHIPS PROJECTED TO HAVE HIGH GROWTH RATE DURING FORECAST PERIOD (2023-2028)	126
11.2	ACCELEROMETER SENSORS	126
11.2.1	MEASURES TIRE PERFORMANCE METRICS	126
TABLE 71	ACCELEROMETER SENSORS: CONNECTED TIRES MARKET, BY REGION, 2019-2022 (THOUSAND UNITS)	127
TABLE 72	ACCELEROMETER SENSORS: CONNECTED TIRES MARKET, BY REGION, 2023-2028 (THOUSAND UNITS)	127
11.3	STRAIN GAUGE SENSORS	127
11.3.1	MORE RELIABLE AND COST-EFFECTIVE	127
TABLE 73	STRAIN GAUGE SENSORS: CONNECTED TIRES MARKET BY REGION, 2019-2022 (THOUSAND UNITS)	128
TABLE 74	STRAIN GAUGE SENSORS: CONNECTED TIRES MARKET BY REGION, 2023-2028 (THOUSAND UNITS)	128
11.4	RFID CHIPS	129
11.4.1	ALLOWS QUICK AND EASY IDENTIFICATION AND TRACKING OF TIRES	129
TABLE 75	RFID CHIPS: CONNECTED TIRES MARKET BY REGION, 2019-2022 (THOUSAND UNITS)	129
TABLE 76	RFID CHIPS: CONNECTED TIRES MARKET BY REGION, 2023-2028 (THOUSAND UNITS)	129
11.5	TPMS	130
11.5.1	MANDATED BY GOVERNMENTS WORLDWIDE TO IMPROVE ROAD SAFETY	130
TABLE 77	TPMS: CONNECTED TIRES MARKET BY REGION, 2019-2022 (THOUSAND UNITS)	130

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



TABLE 78	TPMS: CONNECTED TIRES MARKET BY REGION, 2023-2028 (THOUSAND UNITS)	130
11.6	OTHER SENSORS	131
11.7	KEY PRIMARY INSIGHTS	131
12	CONNECTED TIRES MARKET, BY REGION	132
12.1	INTRODUCTION	133
FIGURE 46	CONNECTED TIRES MARKET, BY REGION (2023-2028)	133
TABLE 79	CONNECTED TIRES MARKET, BY REGION, 2019-2022(USD MILLION)	134
TABLE 80	CONNECTED TIRES MARKET, BY REGION, 2023-2028 (USD MILLION)	134
12.2	NORTH AMERICA	135
FIGURE 47	NORTH AMERICA: CONNECTED TIRES MARKET SNAPSHOT	135
TABLE 81	NORTH AMERICA: CONNECTED TIRES MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	135
TABLE 82	NORTH AMERICA: CONNECTED TIRES MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	136
12.2.1	CANADA	136
12.2.1.1	Increased demand for technologies to optimize performance and efficiency of electric vehicles	136
TABLE 83	CANADA: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	137
12.2.2	US	137
12.2.2.1	Strong government support and presence of leading providers	137
TABLE 84	US: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	137
TABLE 85	US: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	138
12.2.3	MEXICO	138
12.2.3.1	Implementation of several initiatives by government to promote connected technologies	138
TABLE 86	MEXICO: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	138
12.3	ASIA PACIFIC	139
FIGURE 48	ASIA PACIFIC: CONNECTED TIRES MARKET SNAPSHOT	139
TABLE 87	ASIA PACIFIC: CONNECTED TIRES MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	140
TABLE 88	ASIA PACIFIC: CONNECTED TIRES MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	140
12.3.1	CHINA	141
12.3.1.1	Government initiatives to promote technological advancements	141
TABLE 89	CHINA: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	141
TABLE 90	CHINA: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	141
12.3.2	INDIA	142
12.3.2.1	Increased investment by government in connected mobility market	142
TABLE 91	INDIA: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	142
12.3.3	JAPAN	142
12.3.3.1	High R&D investments	142
TABLE 92	JAPAN: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	143
TABLE 93	JAPAN: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	143
12.3.4	SOUTH KOREA	143
12.3.4.1	Partnerships to develop next-generation tires for premium electric vehicles	143
TABLE 94	SOUTH KOREA: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	144
TABLE 95	SOUTH KOREA: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	144
12.3.5	THAILAND	144
12.3.5.1	Low awareness among consumers of connected tires	144
TABLE 96	THAILAND: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028(USD MILLION)	144
12.3.6	REST OF ASIA PACIFIC	145
TABLE 97	REST OF ASIA PACIFIC: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	145
12.4	EUROPE	146

FIGURE 49	CONNECTED TIRES IN EUROPE, BY COUNTRY, 2023-2028 (USD MILLION)	146
TABLE 98	EUROPE: CONNECTED TIRES MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	147
TABLE 99	EUROPE: CONNECTED TIRES MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	147
?		
12.4.1	FRANCE	148
12.4.1.1	Investment by manufacturers to develop new and innovative connected tire technologies	148
TABLE 100	FRANCE: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	148
TABLE 101	FRANCE: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	148
12.4.2	GERMANY	149
12.4.2.1	Ideal market for adoption of connected tires	149
TABLE 102	GERMANY: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	149
TABLE 103	GERMANY: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	149
12.4.3	RUSSIA	150
12.4.3.1	Automotive demand set to recover	150
TABLE 104	RUSSIA: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	150
12.4.4	ITALY	150
12.4.4.1	Need for efficient and safe transportation	150
TABLE 105	ITALY: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	151
TABLE 106	ITALY: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	151
12.4.5	UK	151
12.4.5.1	Higher growth in fleet management sector	151
TABLE 107	UK: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	152
TABLE 108	UK: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	152
12.4.6	TURKEY	152
12.4.6.1	Market to grow at slow rate	152
TABLE 109	TURKEY: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	152
12.4.7	SPAIN	153
12.4.7.1	Presence of major automotive manufacturers	153
TABLE 110	SPAIN: CONNECTED TIRES MARKET, BY OFFERING, 2019-2022 (USD MILLION)	153
TABLE 111	SPAIN: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	153
12.4.8	REST OF EUROPE	153
TABLE 112	REST OF EUROPE: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	154
12.5	REST OF THE WORLD	154
FIGURE 50	REST OF THE WORLD: CONNECTED TIRES MARKET SNAPSHOT	155
TABLE 113	REST OF THE WORLD: CONNECTED TIRES MARKET, BY COUNTRY, 2023-2028(USD MILLION)	155
?		
12.5.1	BRAZIL	155
TABLE 114	BRAZIL: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028(USD MILLION)	156
12.5.2	SOUTH AFRICA	156
TABLE 115	SOUTH AFRICA: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	156
12.5.3	OTHER COUNTRIES	157
TABLE 116	OTHER COUNTRIES: CONNECTED TIRES MARKET, BY OFFERING, 2023-2028 (USD MILLION)	157
13	COMPETITIVE LANDSCAPE	158
13.1	OVERVIEW	158
13.2	MARKET RANKING ANALYSIS FOR CONNECTED TIRES MARKET	158
FIGURE 51	MARKET RANKING ANALYSIS, 2022	158
13.3	REVENUE ANALYSIS OF TOP LISTED PLAYERS	160

FIGURE 52 REVENUE ANALYSIS, 2017-2021 160

13.4 COMPETITIVE SCENARIO 160

13.4.1 DEALS 160

TABLE 117 DEALS, 2020-2023 161

13.4.2 NEW PRODUCT LAUNCHES 162

TABLE 118 PRODUCT LAUNCHES, 2020-2023 162

13.4.3 OTHERS, 2020-2023 163

TABLE 119 OTHERS, 2020-2023 163

13.5 COMPANY EVALUATION QUADRANT FOR CONNECTED TIRES MARKET 164

13.5.1 STARS 164

13.5.2 EMERGING LEADERS 164

13.5.3 PERVASIVE PLAYERS 164

13.5.4 PARTICIPANTS 165

FIGURE 53 CONNECTED TIRES MARKET: COMPANY EVALUATION QUADRANT, 2022 165

TABLE 120 CONNECTED TIRES MARKET: COMPANY FOOTPRINT, 2022 166

TABLE 121 CONNECTED TIRES MARKET: VEHICLE TYPE FOOTPRINT, 2022 166

TABLE 122 CONNECTED TIRES MARKET: REGIONAL FOOTPRINT, 2022 167

13.6 STARTUP/SME EVALUATION QUADRANT 167

13.6.1 PROGRESSIVE COMPANIES 167

13.6.2 RESPONSIVE COMPANIES 167

13.6.3 DYNAMIC COMPANIES 167

13.6.4 STARTING BLOCKS 168

FIGURE 54 CONNECTED TIRES MARKET: SME EVALUATION QUADRANT, 2022 168

13.7 COMPETITIVE BENCHMARKING 169

TABLE 123 CONNECTED TIRES MARKET: DETAILED LIST OF KEY STARTUPS 169

TABLE 124 CONNECTED TIRES MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS [STARTUPS] 169

?

14 COMPANY PROFILES 170

14.1 KEY PLAYERS 170

(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)\*

14.1.1 GOODYEAR 170

TABLE 125 GOODYEAR: BUSINESS OVERVIEW 170

FIGURE 55 GOODYEAR: COMPANY SNAPSHOT 171

FIGURE 56 GOODYEAR REMOTE TIRE MONITORING 172

TABLE 126 GOODYEAR: PRODUCTS OFFERED 172

TABLE 127 GOODYEAR: PRODUCT LAUNCHES 173

14.1.2 MICHELIN 174

TABLE 128 MICHELIN: BUSINESS OVERVIEW 174

FIGURE 57 MICHELIN: COMPANY SNAPSHOT 175

FIGURE 58 MICHELIN CONNECTED TECHNOLOGIES 175

TABLE 129 MICHELIN: PRODUCTS OFFERED 176

TABLE 130 MICHELIN: PRODUCT LAUNCHES 176

TABLE 131 MICHELIN: DEALS 177

14.1.3 PIRELLI 179

TABLE 132 PIRELLI: BUSINESS OVERVIEW 179

FIGURE 59 PIRELLI: COMPANY SNAPSHOT 180

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 60	PIRELLI MOBILITY OF FUTURE	180
TABLE 133	PIRELLI: PRODUCTS OFFERED	181
TABLE 134	PIRELLI: PRODUCT LAUNCHES	181
TABLE 135	PIRELLI: DEALS	182
TABLE 136	PIRELLI: OTHERS	182
14.1.4	BRIDGESTONE	184
TABLE 137	BRIDGESTONE: BUSINESS OVERVIEW	184
FIGURE 61	BRIDGESTONE: COMPANY SNAPSHOT	185
FIGURE 62	BRIDGESTONE ACQUIRES TOMTOM TELEMATICS	185
TABLE 138	BRIDGESTONE: PRODUCTS OFFERED	186
TABLE 139	BRIDGESTONE: PRODUCT LAUNCHES	186
TABLE 140	BRIDGESTONE: DEALS	187
TABLE 141	BRIDGESTONE: OTHERS	187
14.1.5	CONTINENTAL AG	189
TABLE 142	CONTINENTAL AG: BUSINESS OVERVIEW	189
FIGURE 63	CONTINENTAL AG: COMPANY SNAPSHOT	190
FIGURE 64	CONTINENTAL AG DIGITAL TIRE MONITORING	190
TABLE 143	CONTINENTAL AG: PRODUCTS OFFERED	191
TABLE 144	CONTINENTAL AG: PRODUCT LAUNCHES	191
TABLE 145	CONTINENTAL AG: DEALS	192
14.1.6	NOKIAN TYRES	193
TABLE 146	NOKIAN TYRES: BUSINESS OVERVIEW	193
FIGURE 65	NOKIAN TYRES: COMPANY SNAPSHOT	194
TABLE 147	NOKIAN TYRES: PRODUCTS OFFERED	194
TABLE 148	NOKIAN TYRES: PRODUCT LAUNCHES	195
14.1.7	YOKOHAMA RUBBER CO.	196
TABLE 149	YOKOHAMA RUBBER CO.: BUSINESS OVERVIEW	196
FIGURE 66	YOKOHAMA RUBBER CO.: COMPANY SNAPSHOT	196
TABLE 150	YOKOHAMA RUBBER CO.: PRODUCTS OFFERED	197
TABLE 151	YOKOHAMA RUBBER CO.: DEALS	197
14.1.8	SUMITOMO RUBBER INDUSTRIES LTD.	198
TABLE 152	SUMITOMO RUBBER INDUSTRIES LTD.: BUSINESS OVERVIEW	198
FIGURE 67	SUMITOMO RUBBER INDUSTRIES LTD.: COMPANY SNAPSHOT	199
TABLE 153	SUMITOMO RUBBER INDUSTRIES LTD.: PRODUCTS OFFERED	199
TABLE 154	SUMITOMO RUBBER INDUSTRIES LTD.: PRODUCT LAUNCHES	200
14.1.9	TOYO TIRES	201
TABLE 155	TOYO TIRES: BUSINESS OVERVIEW	201
FIGURE 68	TOYO TIRES: COMPANY SNAPSHOT	202
TABLE 156	TOYO TIRES: PRODUCTS OFFERED	202
TABLE 157	TOYO TIRES: DEALS	203
14.1.10	JK TYRE	204
TABLE 158	JK TYRE: BUSINESS OVERVIEW	204
FIGURE 69	JK TYRE: COMPANY SNAPSHOT	204
TABLE 159	JK TYRE: PRODUCTS OFFERED	205
TABLE 160	JK TYRE: PRODUCT LAUNCHES	205
14.1.11	MRF	206
TABLE 161	MRF: BUSINESS OVERVIEW	206

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

FIGURE 70 MRF: COMPANY SNAPSHOT 206

TABLE 162 MRF: PRODUCTS OFFERED 207

14.1.12 HANKOOK TIRES 208

TABLE 163 HANKOOK TIRES: BUSINESS OVERVIEW 208

FIGURE 71 HANKOOK TIRES: COMPANY SNAPSHOT 208

TABLE 164 HANKOOK TIRES: PRODUCTS OFFERED 209

TABLE 165 HANKOOK TIRES: DEALS 209

\*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

14.2 OTHER PLAYERS 210

14.2.1 KUMHO 210

TABLE 166 KUMHO TIRE: BUSINESS OVERVIEW 210

14.2.2 BF GOODRICH 210

TABLE 167 BF GOODRICH: BUSINESS OVERVIEW 210

14.2.3 MAXXIS 211

TABLE 168 MAXXIS: BUSINESS OVERVIEW 211

14.2.4 FALKEN 211

TABLE 169 FALKEN: BUSINESS OVERVIEW 211

14.2.5 GENERAL TIRE 212

TABLE 170 GENERAL TIRE: BUSINESS OVERVIEW 212

14.2.6 UNIROYAL 212

TABLE 171 UNIROYAL: BUSINESS OVERVIEW 212

14.2.7 COOPER TIRE & RUBBER COMPANY 213

TABLE 172 COOPER TIRE & RUBBER COMPANY: BUSINESS OVERVIEW 213

14.2.8 FIRESTONE TIRE AND RUBBER COMPANY 213

TABLE 173 FIRESTONE TIRE AND RUBBER COMPANY: BUSINESS OVERVIEW 213

14.2.9 NITTO TIRE 214

TABLE 174 NITTO TIRE: BUSINESS OVERVIEW 214

14.2.10 SMART TIRE COMPANY 214

TABLE 175 SMART TIRE COMPANY: BUSINESS OVERVIEW 214

14.2.11 SAILUN TIRES 215

TABLE 176 SAILUN TIRES: BUSINESS OVERVIEW 215

15 RECOMMENDATIONS BY MARKETSANDMARKETS 216

15.1 ASIA PACIFIC TO OFFER MOST LUCRATIVE OPPORTUNITIES IN CONNECTED TIRES MARKET 216

15.2 TECHNOLOGICAL ADVANCEMENTS TO BE CRUCIAL FOR MARKET GROWTH 216

15.3 SOFTWARE SOLUTIONS TO BE INTEGRAL PART OF CONNECTED TIRES AND ADVANCED IOT-ENABLED APPLICATIONS 217

15.4 CONCLUSION 217

16 APPENDIX 218

16.1 KEY INSIGHTS FROM INDUSTRY EXPERTS 218

16.2 DISCUSSION GUIDE 219

16.3 KNOWLEDGESTORE: MARKETSANDMARKETS? SUBSCRIPTION PORTAL 222

16.4 CUSTOMIZATION OPTIONS 224

16.5 RELATED REPORTS 224

16.6 AUTHOR DETAILS 225

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Connected Tires Market by Vehicle Type, Component, Rim Size (12-17 Inches, 18-22 Inches, More than 22 Inches), Sales Channel (OEM, Aftermarket), Propulsion (Electric, ICE), Offering (Hardware, Software) and Region - Global Forecast to 2028**

Market Report | 2023-06-05 | 218 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-20

Signature



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)