

**Automotive Tires Market for OE & Replacement By Rim (13-15, 16-18, 19-21,>21"), Aspect Ratio(<60, 60-70, >70), Section Width (<200, 200-230,>230 mm), Season (Summer, Winter-Studded Non-Studded & All Season), Vehicle Type, Retreading & Region - Global Forecast to 2028**

Market Report | 2023-09-04 | 340 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

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

**Report description:**

The tire aftermarket is projected to grow from USD 19.6 billion in 2023 to USD 21.6 billion by 2028 at a CAGR of 2.0%. The growth in automobile ownership per capita, a shift in customers' demand to use low rolling resistance tires, and increase in average miles driven by the vehicles will fuel the growth of the aftermarket tires. An increase in tire aftermarket demand is anticipated due to the growth in the market for passenger vehicles and the rise in the number of used automobiles on the road due to greater personal vehicle use. Increasing internet penetration and emerging technical advancements are other factors driving the tire aftermarket.

"North America to be the largest market for retreading."

North American market is driven by increased production of new cars coupled with the development of used cars. The higher fleet of light and heavy commercial vehicles have relatively higher average miles, requiring more tire replacement. The cost of aftermarket tires for an HCV is USD 230-250, whereas a retreaded tire of similar dimensions can cost almost 40% less. Expanding retreading facilities in this area will also increase demand for retreaded tires during the forecast period. In addition, retread tires come with benefits such as improved tread life quality, cost savings, and fuel efficiency. Retreaded tires are more environmentally friendly than new tires since they use less energy and raw materials during production. Favorable government regulations and a rise in the use of retreaded tires are predicted to open up new growth prospects in this sector. However, a worn-out tire's casing is given a fresh rubber coat without modifying the infrastructure's cords. As a result, the quality of the retreaded tires always stays a lot down than that of the new tire.

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

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

www.scotts-international.com

"Section width of >230 mm is the fastest-growing segment in the tires replacement market."

Low-profile tires are becoming increasingly popular, and their section width is more significant than their section height. Full section width gives increased vehicle stability, lighter weight, ability to handle increased payload weight, and improved fuel economy. Premium passenger cars typically have section widths greater than 230 mm. In North America, examples of such vehicles are the GM Group Cadillac, FCA Dodge Challenger, Tata Range Rover Sport, BMW 5 series, Audi Q5, and others. The segment with the most tire replacement cycles is reportedly premium cars. The section width of heavy commercial vehicles ranges from 85% to 90%.

"North America is the second largest market by volume for automotive tire aftermarket."

North America is the second most prominent location for manufacturing and sales of vehicles. The region contributed 24% to global vehicle production and 26% to global vehicle sales in 2023. The region is home to key players in the automotive tire OE market, such as Goodyear Tire & Rubber Company (US), Cooper Tire & Rubber Company (US), Pirelli & C. S.p.A. (Italy), Michelin (France), and Bridgestone (Japan). The US, which is home to the big three vehicle manufacturers, including Ford (US), General Motors (US), and Fiat Chrysler (UK), is known for premium passenger cars. High demand for luxury and premium segment vehicles is expected to drive North America's automotive tire OE market. Furthermore, North America contributes to ~30% of the global vehicle parc (2022).

A rise in the demand for premium quality tires in ultra-high-performance vehicles for enhanced stability and reliability, longer operational life, and high puncture resistance is expected to boost the need for the market. Along with this, the growing emphasis on enhancing driver and passenger safety due to the rising incidence of deadly traffic accidents is influencing the market positively in the region. Additionally, the growing use of winter tires during severe weather events like snow and ice will likely increase the tire market. Furthermore, the growing preference for premium tires and vehicles for logistics and transportation activities to deliver packages on time due to their many benefits, including improved stopping power, increased overall safety, and better handling, creates a positive outlook for the market across the region.

The break-up of the profile of primary participants in the automotive tire market:

By Companies: Tier 1 - 80%, Tier 2 - 20%

By Designation: Directors- 10%, C-Level Executives - 60%, Manager level - 30%

By Region: North America - 10%, Europe - 0%, APAC - 90% and MEA - 0%

Global players dominate the automotive tire market and comprise several regional players. The key players in the automotive tire market are Bridgestone Corporation (Japan), Goodyear Tire & Rubber Company (United States), Continental AG (Germany), Michelin (France), and Sumitomo Rubber Industries (Japan).

?

Research Coverage:

This Research Report Categorizes The Tire Market By Automotive Tire Aftermarket,

By Section Width And Vehicle Type (<200 Mm, 200-230 Mm, and >230 Mm), Automotive Tire Aftermarket, By Aspect Ratio And Vehicle Type (<60, 60-70, and >70), Automotive Tire Aftermarket, By Rim Size And Vehicle Type (13-15", 16-18", 19-21", and > 21"), Automotive Tire Retreading Market, By Vehicle Type (Passenger Cars, Light, and Heavy Commercial Vehicles), Automotive Tire Oe Market, By Vehicle Type And Rim Size (Passenger Cars, Light Commercial Vehicles, Buses, and Trucks), Automotive Tire Aftermarket Market, By Season (Summer, Winter And All Season), Automotive Tire Aftermarket,

By Vehicle Type (Passenger Cars, Light, and Heavy Commercial Vehicles), by Automotive Tire OE Market, By Type (Radial And Bias), And By Region (Asia Pacific, Europe, North America, And Rest Of The World).

The report's scope covers detailed information regarding the major factors, such as influencing factors for the growth of the automotive tire market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, recession impact, and recent developments associated with the automotive tire market. ?

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall automotive tire market and their subsegments. This report will help stakeholders understand the competitive

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

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

www.scotts-international.com

landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse.

The report provides insights on the following pointers:

-□Analysis of key drivers (Increasing average life of vehicles and annual miles driven by light-duty vehicles, increase in demand for high-performance tires, and high demand for low rolling resistance tires), restraints (Volatility in raw material prices and increasing longevity of tires affecting aftermarket sales), opportunities (Demand for eco-friendly tires owing to stringent regulations, Increased use of bio-oils in the manufacturing process of tires, connected/ smart tires for autonomous cars), and challenges (Increasing number of mandatory tests to be performed before commercial use of tires and investing in R&D for effective and sustainable waste management solutions to incur additional cost) influencing the growth of the automotive tire market.

-□Product Development/Innovation: Detailed insights on new products such as ADVAN V61 Tires by Yokohama Rubber Co., Ltd. in July 2023 and Procontrol launched by Cooper Tire & Rubber in May 2023.

-□Market Development: The growing demand for passenger cars and rising demand for commercial is driving the market - the report analyses the automotive tire market across varied regions.

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

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Bridgestone Corporation (Japan), Goodyear Tire & Rubber Company (US), Continental AG (Germany), Michelin (France), and Sumitomo Rubber Industries (Japan). among others in the automotive tire market.

The report also helps stakeholders understand the pulse of the automotive tire market by providing information on recent trends and technologies.

## **Table of Contents:**

1	INTRODUCTION	30
1.1	STUDY OBJECTIVES	30
1.2	MARKET DEFINITION	31
TABLE 1	INCLUSIONS AND EXCLUSIONS	31
1.3	MARKET SCOPE	32
FIGURE 1	AUTOMOTIVE TIRE MARKET OE & REPLACEMENT SEGMENTATION	32
1.3.1	YEARS CONSIDERED	33
1.4	CURRENCY CONSIDERED	33
1.5	STAKEHOLDERS	33
1.6	SUMMARY OF CHANGES	34
1.6.1	RECESSION IMPACT	34
2	RESEARCH METHODOLOGY	35
2.1	RESEARCH DATA	35
FIGURE 2	AUTOMOTIVE TIRE MARKET: RESEARCH DESIGN	35
FIGURE 3	RESEARCH DESIGN MODEL	36
2.1.1	SECONDARY DATA	37
2.1.1.1	Key secondary sources for market sizing	37
2.1.1.2	Key secondary sources for vehicle production	37
2.1.1.3	Key data from secondary sources	38
2.1.2	PRIMARY DATA	38
FIGURE 4	BREAKDOWN OF PRIMARY INTERVIEWS	39
2.1.2.1	Sampling techniques & data collection methods	39
2.1.2.2	Primary participants	39

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

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

www.scotts-international.com

2.2	MARKET SIZE ESTIMATION	40
2.2.1	BOTTOM-UP APPROACH	40
FIGURE 5	AUTOMOTIVE TIRE OE MARKET (RIM SIZE AND REGIONAL/COUNTRY LEVEL)	40
FIGURE 6	AUTOMOTIVE TIRE AFTERMARKET (BY VEHICLE TYPE AND REGION)	40
FIGURE 7	AUTOMOTIVE TIRE RETREADING MARKET (BY REGION AND VEHICLE TYPE)	41
2.2.2	TOP-DOWN APPROACH	41
FIGURE 8	AUTOMOTIVE TIRE OE MARKET (TIRE TYPE)	41
FIGURE 9	AUTOMOTIVE TIRE AFTERMARKET (BY SECTION WIDTH, ASPECT RATIO, RIM SIZE, AND SEASON)	41
2.3	MARKET BREAKDOWN AND DATA TRIANGULATION	42
FIGURE 10	DATA TRIANGULATION	42
2.4	FACTOR ANALYSIS	43
2.5	RESEARCH ASSUMPTIONS AND ASSOCIATED RISKS	43
2.5.1	AVERAGE NUMBER OF TIRES EMPLOYED, BY VEHICLE TYPE	44
2.5.2	AVERAGE NUMBER OF TIRES REPLACED IN SINGLE SERVICE CYCLE, BY VEHICLE TYPE	44
2.6	RESEARCH LIMITATIONS	44
2.7	RECESSION IMPACT	45
3	EXECUTIVE SUMMARY	46
FIGURE 11	AUTOMOTIVE TIRE MARKET OUTLOOK	46
FIGURE 12	AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE, 2023 VS. 2028 (USD MILLION)	47
FIGURE 13	AUTOMOTIVE TIRE AFTERMARKET MARKET, BY VEHICLE TYPE, 2023 VS. 2028 (USD MILLION)	48
4	PREMIUM INSIGHTS	49
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE TIRE MARKET	49
FIGURE 14	INCREASING DEMAND FOR HIGH-PERFORMANCE TIRES TO DRIVE MARKET	49
4.2	AUTOMOTIVE TIRE AFTERMARKET, BY REGION	49
FIGURE 15	NORTH AMERICA TO DOMINATE AUTOMOTIVE TIRE AFTERMARKET FROM 2023 TO 2028	49
4.3	AUTOMOTIVE TIRE AFTERMARKET, BY SEASON	50
FIGURE 16	WINTER TIRES SEGMENT TO GROW AT HIGHEST RATE DURING FORECAST PERIOD	50
4.4	AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH	50
FIGURE 17	>230 MM SEGMENT TO LEAD AUTOMOTIVE TIRE AFTERMARKET DURING FORECAST PERIOD	50
4.5	AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO	51
FIGURE 18	>70 SEGMENT TO LEAD AUTOMOTIVE TIRE AFTERMARKET DURING FORECAST PERIOD	51
4.6	AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE	51
FIGURE 19	19-21" SEGMENT TO GROW AT HIGHEST RATE DURING FORECAST PERIOD	51
4.7	AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE	52
FIGURE 20	LIGHT COMMERCIAL VEHICLES SEGMENT TO GROW AT HIGHEST RATE DURING FORECAST PERIOD	52
4.8	AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE	52
FIGURE 21	HEAVY COMMERCIAL VEHICLES SEGMENT TO DOMINATE AUTOMOTIVE TIRE RETREADING MARKET FROM 2023 TO 2028	52
4.9	AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE	53
FIGURE 22	PASSENGER CARS SEGMENT TO LEAD AUTOMOTIVE TIRE MARKET DURING FORECAST PERIOD	53
4.10	AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE	53
FIGURE 23	RADIAL TIRES SEGMENT TO LEAD AUTOMOTIVE TIRE OE MARKET DURING FORECAST PERIOD	53
4.11	AUTOMOTIVE TIRE OE MARKET, BY REGION	54
FIGURE 24	ASIA PACIFIC ESTIMATED TO DOMINATE AUTOMOTIVE TIRE OE MARKET IN 2023	54
?		
5	MARKET OVERVIEW	55
5.1	INTRODUCTION	55

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

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

www.scotts-international.com

## 5.2 MARKET DYNAMICS 56

### FIGURE 25 AUTOMOTIVE TIRE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES 56

#### 5.2.1 DRIVERS 56

##### 5.2.1.1 Increasing average life of vehicles and average annual miles driven by light-duty vehicles 56

### FIGURE 26 EU VEHICLE FLEET AVERAGE AGE (YEARS) 57

##### 5.2.1.2 Increase in demand for high-performance tires 57

##### 5.2.1.3 High demand for low rolling resistance tires 57

### TABLE 2 TIRE EFFICIENCY CLASSIFICATION 58

#### 5.2.2 RESTRAINTS 58

##### 5.2.2.1 Volatility in raw material prices 58

##### 5.2.2.2 Increasing longevity of tires affecting aftermarket sales 58

#### 5.2.3 OPPORTUNITIES 59

##### 5.2.3.1 Rising popularity of eco-friendly tires owing to stringent regulations 59

### TABLE 3 TIRE MANUFACTURERS FOCUS ON ECO-FRIENDLY MATERIALS 59

##### 5.2.3.2 Increased use of bio-oil in tire manufacturing processes 60

##### 5.2.3.3 Rising demand for connected/smart tires for autonomous cars 60

#### 5.2.4 CHALLENGES 60

##### 5.2.4.1 Increasing number of mandatory tests for tires before commercialization 60

##### 5.2.4.2 Need for investment in R&D for effective and sustainable waste management solutions 61

## 5.3 CASE STUDY 61

### 5.3.1 MRF TYRES 61

### 5.3.2 JK TYRE & INDUSTRIES LTD. 62

## 5.4 PATENT ANALYSIS 63

### TABLE 4 PATENT ANALYSIS 63

## 5.5 TRADE ANALYSIS 66

### 5.5.1 IMPORT DATA 66

#### 5.5.1.1 US 66

### TABLE 5 US: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 66

#### 5.5.1.2 Canada 66

### TABLE 6 CANADA: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 66

#### 5.5.1.3 China 66

### TABLE 7 CHINA: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 66

#### 5.5.1.4 Japan 67

### TABLE 8 JAPAN: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 67

#### 5.5.1.5 India 67

### TABLE 9 INDIA: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 67

#### 5.5.1.6 Germany 67

### TABLE 10 GERMANY: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 67

#### 5.5.1.7 France 68

### TABLE 11 FRANCE: TIRES IMPORT SHARE, BY COUNTRY (VALUE %) 68

### 5.5.2 EXPORT DATA 68

#### 5.5.2.1 US 68

### TABLE 12 US: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 68

#### 5.5.2.2 Canada 68

### TABLE 13 CANADA: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 68

#### 5.5.2.3 China 69

### TABLE 14 CHINA: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 69

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

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

www.scotts-international.com

#### 5.5.2.4 Japan 69

TABLE 15 JAPAN: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 69

#### 5.5.2.5 India 69

TABLE 16 INDIA: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 69

#### 5.5.2.6 Germany 70

TABLE 17 GERMANY: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 70

#### 5.5.2.7 France 70

TABLE 18 FRANCE: TIRES EXPORT SHARE, BY COUNTRY (VALUE %) 70

#### 5.6 Supply Chain Analysis 71

FIGURE 27 SUPPLY CHAIN ANALYSIS: AUTOMOTIVE TIRE MARKET 71

#### 5.7 Market Ecosystem 72

FIGURE 28 AUTOMOTIVE TIRE MARKET ECOSYSTEM 72

TABLE 19 ROLE OF COMPANIES IN AUTOMOTIVE TIRE MARKET ECOSYSTEM 73

#### 5.8 Pricing Analysis 74

5.8.1 BY REGION & RIM SIZE, 2022 (USD) 74

TABLE 20 AVERAGE PRICE OF AUTOMOTIVE OE TIRES, BY REGION & RIM SIZE, 2022 (USD) 74

5.8.2 BY REGION & VEHICLE TYPE, 2022 (USD) 74

TABLE 21 AVERAGE PRICE OF AUTOMOTIVE AFTERMARKET TIRES, BY REGION & VEHICLE TYPE, 2022 (USD) 74

5.8.3 BY RAW MATERIAL 75

TABLE 22 AVERAGE PRICE OF AUTOMOTIVE TIRES, BY REGION & RAW MATERIAL, 2022 (USD) 75

#### 5.9 Trends/Disruptions Impacting Market 75

FIGURE 29 REVENUE SHIFT FOR AUTOMOTIVE TIRE MARKET 75

#### 5.10 Regulatory Framework 76

5.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 76

5.10.1.1 North America 76

TABLE 23 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 76

5.10.1.2 Europe 77

TABLE 24 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 77

5.10.1.3 Asia Pacific 77

TABLE 25 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 77

#### 5.11 Technology Trends 78

5.11.1 SMART TIRES 78

5.11.2 3D-PRINTED TIRES 78

5.11.3 RUN-FLAT TIRES 78

5.11.4 INTELLIGENT TIRES 78

5.12 KEY CONFERENCES AND EVENTS, 2023-2024 79

5.13 KEY STAKEHOLDERS AND BUYING CRITERIA 80

5.13.1 BUYING CRITERIA 80

FIGURE 30 KEY BUYING CRITERIA FOR AUTOMOTIVE TIRES 80

TABLE 26 KEY BUYING CRITERIA FOR AUTOMOTIVE TIRES 81

5.13.2 KEY STAKEHOLDERS IN BUYING PROCESS, BY VEHICLE TYPE 81

TABLE 27 KEY STAKEHOLDERS IN BUYING PROCESS FOR VEHICLE TYPES 81

#### 6 Recommendations by Markets and Markets 82

6.1 ASIA PACIFIC: KEY MARKET FOR AUTOMOTIVE TIRE MANUFACTURERS 82

6.2 COMPANIES TO ENHANCE FOCUS ON HIGH-PERFORMANCE AND GREEN TIRES 82

6.3 CONCLUSION 83

7 AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH 84

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

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

www.scotts-international.com

## 7.1 INTRODUCTION 85

### 7.1.1 INDUSTRY INSIGHTS 85

FIGURE 31 AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH, 2023 VS. 2028 (USD MILLION) 85

TABLE 28 AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH, 2019-2022 (MILLION UNITS) 86

TABLE 29 AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH, 2023-2028 (MILLION UNITS) 86

TABLE 30 AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH, 2019-2022 (USD MILLION) 86

TABLE 31 AUTOMOTIVE TIRE AFTERMARKET, BY SECTION WIDTH, 2023-2028 (USD MILLION) 86

### 7.2 <200 MM 87

7.2.1 GROWING DEMAND FOR COMPACT AND SUBCOMPACT VEHICLES TO DRIVE MARKET 87

TABLE 32 <200 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 87

TABLE 33 <200 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 88

TABLE 34 <200 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 89

TABLE 35 <200 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 90

### 7.3 200-230 MM 91

7.3.1 RISING SALES OF LIGHT COMMERCIAL VEHICLES TO DRIVE MARKET 91

TABLE 36 200-230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 91

TABLE 37 200-230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 92

TABLE 38 200-230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 93

TABLE 39 200-230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 94

### 7.4 >230 MM 95

7.4.1 INCREASING SALES OF HEAVY COMMERCIAL VEHICLES TO DRIVE MARKET 95

TABLE 40 >230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 95

TABLE 41 >230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 96

TABLE 42 >230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 97

TABLE 43 >230 MM SECTION WIDTH: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 98

8 AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO 99

## 8.1 INTRODUCTION 100

### 8.1.1 INDUSTRY INSIGHTS 100

FIGURE 32 AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO, 2023 VS. 2028 (USD MILLION) 100

TABLE 44 AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO, 2019-2022 (MILLION UNITS) 101

TABLE 45 AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO, 2023-2028 (MILLION UNITS) 101

TABLE 46 AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO, 2019-2022 (USD MILLION) 101

TABLE 47 AUTOMOTIVE TIRE AFTERMARKET, BY ASPECT RATIO, 2023-2028 (USD MILLION) 101

### 8.2 <60 102

8.2.1 INCREASING DEMAND FOR PERFORMANCE CARS AND SEDANS TO DRIVE MARKET FOR <60 ASPECT RATIO TIRES 102

TABLE 48 <60 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 102

TABLE 49 <60 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 103

TABLE 50 <60 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 104

TABLE 51 <60 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 105

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

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

www.scotts-international.com

### 8.3 60-70 106

#### 8.3.1 RISING SALES OF SUVs AND CROSSOVERS TO DRIVE MARKET 106

TABLE 52 60-70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 106

TABLE 53 60-70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 107

TABLE 54 60-70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 108

TABLE 55 60-70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 109

### 8.4 >70 110

#### 8.4.1 GROWING E-COMMERCE INDUSTRY TO DRIVE MARKET 110

TABLE 56 >70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 110

TABLE 57 >70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 111

TABLE 58 >70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 112

TABLE 59 >70 ASPECT RATIO: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 113

9 AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE 114

### 9.1 INTRODUCTION 115

#### 9.1.1 INDUSTRY INSIGHTS 115

FIGURE 33 AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE, 2023 VS. 2028 (USD MILLION) 115

TABLE 60 AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE, 2019-2022 (MILLION UNITS) 116

TABLE 61 AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE, 2023-2028 (MILLION UNITS) 116

TABLE 62 AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE, 2019-2022 (USD MILLION) 116

TABLE 63 AUTOMOTIVE TIRE AFTERMARKET, BY RIM SIZE, 2023-2028 (USD MILLION) 116

### 9.2 13-15" 117

#### 9.2.1 GROWING DEMAND FOR AFFORDABLE CARS TO DRIVE MARKET 117

TABLE 64 13-15" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 117

TABLE 65 13-15" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 118

TABLE 66 13-15" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 119

TABLE 67 13-15" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 120

### 9.3 16-18" 121

#### 9.3.1 GROWTH OF LOGISTICS INDUSTRY TO DRIVE MARKET 121

TABLE 68 16-18" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 121

TABLE 69 16-18" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 122

TABLE 70 16-18" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 123

TABLE 71 16-18" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 124

### 9.4 19-21" 125

#### 9.4.1 RISING DEMAND FOR LUXURY AND SPORTS CARS TO DRIVE MARKET 125

TABLE 72 19-21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 125

TABLE 73 19-21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 126

TABLE 74 19-21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 127

TABLE 75 19-21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 128

### 9.5 >21" 129

#### 9.5.1 INCREASING GLOBAL MEGA PROJECTS TO DRIVE MARKET 129

TABLE 76 MEGAPROJECTS REQUIRING COMMERCIAL VEHICLES WITH >21" RIM-SIZED TIRES 129

TABLE 77 >21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (MILLION UNITS) 129

TABLE 78 >21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (MILLION UNITS) 130

TABLE 79 >21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2019-2022 (USD MILLION) 131

TABLE 80 >21" RIM SIZE: AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE & REGION, 2023-2028 (USD MILLION) 132

10 AUTOMOTIVE TIRE AFTERMARKET, BY SEASON 133

### 10.1 INTRODUCTION 134

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

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

www.scotts-international.com

## 10.1.1 INDUSTRY INSIGHTS 134

FIGURE 34 AUTOMOTIVE TIRE AFTERMARKET, BY SEASON, 2023 VS. 2028 (USD MILLION) 134

TABLE 81 AUTOMOTIVE TIRE AFTERMARKET, BY SEASON, 2019-2022 (MILLION UNITS) 135

TABLE 82 AUTOMOTIVE TIRE AFTERMARKET, BY SEASON, 2023-2028 (MILLION UNITS) 135

TABLE 83 AUTOMOTIVE TIRE AFTERMARKET, BY SEASON, 2019-2022 (USD MILLION) 135

TABLE 84 AUTOMOTIVE TIRE AFTERMARKET, BY SEASON, 2023-2028 (USD MILLION) 135

## 10.2 SUMMER TIRES 136

10.2.1 RISE IN PERFORMANCE VEHICLES EQUIPPED WITH SUMMER TIRES TO DRIVE MARKET 136

TABLE 85 SUMMER TIRE LAUNCHES, 2022-2023 136

TABLE 86 SUMMER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 137

TABLE 87 SUMMER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 137

TABLE 88 SUMMER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 137

TABLE 89 SUMMER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 138

?

## 10.3 WINTER TIRES 138

10.3.1 GOVERNMENT REGULATIONS FOR USE OF WINTER TIRES IN CERTAIN COUNTRIES DURING WINTER MONTHS TO DRIVE MARKET 138

TABLE 90 WINTER TIRE LAUNCHES, 2022-2023 139

TABLE 91 WINTER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 139

TABLE 92 WINTER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 139

TABLE 93 WINTER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 140

TABLE 94 WINTER TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 140

### 10.3.2 STUDDED TIRES 140

TABLE 95 STUDDED TIRE LAUNCHES, 2022-2023 141

TABLE 96 STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 141

TABLE 97 STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 141

TABLE 98 STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 142

TABLE 99 STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 142

### 10.3.3 NON-STUDDED TIRES 143

TABLE 100 NON-STUDDED TIRE LAUNCHES, 2022-2023 143

TABLE 101 NON-STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 143

TABLE 102 NON-STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 144

TABLE 103 NON-STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 144

TABLE 104 NON-STUDDED WINTER TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 144

## 10.4 ALL-SEASON TIRES 145

10.4.1 INCREASING SALES OF PASSENGER CARS AND SUVs TO DRIVE DEMAND FOR ALL-SEASON TIRES 145

TABLE 105 ALL-SEASON TIRE LAUNCHES, 2022-2023 145

TABLE 106 ALL-SEASON TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 146

TABLE 107 ALL-SEASON TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 146

TABLE 108 ALL-SEASON TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 146

TABLE 109 ALL-SEASON TIRES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 147

?

11 AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE 148

## 11.1 INTRODUCTION 149

### 11.1.1 INDUSTRY INSIGHTS 149

FIGURE 35 AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE, 2023 VS. 2028 (USD MILLION) 149

TABLE 110 AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE, 2019-2022 (MILLION UNITS) 150

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

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

www.scotts-international.com

TABLE 111 AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE, 2023-2028 (MILLION UNITS) 150

TABLE 112 AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 150

TABLE 113 AUTOMOTIVE TIRE AFTERMARKET, BY VEHICLE TYPE, 2023-2028 (USD MILLION) 150

11.2 PASSENGER CARS 151

11.2.1 GROWING RENTAL CAR AND RIDE-SHARING BUSINESSES TO DRIVE MARKET 151

TABLE 114 RIDE-SHARING, TAXI, AND RENTAL CAR SERVICES, 2022 151

TABLE 115 PASSENGER CARS: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 152

TABLE 116 PASSENGER CARS: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 152

TABLE 117 PASSENGER CARS: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 152

TABLE 118 PASSENGER CARS: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 153

11.3 LIGHT COMMERCIAL VEHICLES 153

11.3.1 GROWING FLEET AND DELIVERY SERVICES TO DRIVE MARKET 153

TABLE 119 LIGHT COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 153

TABLE 120 LIGHT COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 154

TABLE 121 LIGHT COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 154

TABLE 122 LIGHT COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 154

11.4 HEAVY COMMERCIAL VEHICLES 155

11.4.1 GROWING CONSTRUCTION AND MINING INDUSTRIES TO DRIVE MARKET 155

TABLE 123 EUROPE AND US REGULATIONS AND STANDARDS FOR HCVS, 2022 155

TABLE 124 HEAVY COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (MILLION UNITS) 156

TABLE 125 HEAVY COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (MILLION UNITS) 156

TABLE 126 HEAVY COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2019-2022 (USD MILLION) 156

TABLE 127 HEAVY COMMERCIAL VEHICLES: AUTOMOTIVE TIRE AFTERMARKET, BY REGION, 2023-2028 (USD MILLION) 157

?

12 AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE 158

12.1 INTRODUCTION 159

12.1.1 INDUSTRY INSIGHTS 159

FIGURE 36 AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE, 2023 VS. 2028 (USD MILLION) 160

TABLE 128 AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE, 2019-2022 (MILLION UNITS) 160

TABLE 129 AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE, 2023-2028 (MILLION UNITS) 160

TABLE 130 AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 161

TABLE 131 AUTOMOTIVE TIRE RETREADING MARKET, BY VEHICLE TYPE, 2023-2028 (USD MILLION) 161

12.2 PASSENGER CARS 161

12.2.1 RISING DEMAND FOR USED CARS TO DRIVE MARKET 161

TABLE 132 PASSENGER CARS TIRE RETREADING MARKET, BY REGION, 2019-2022 (MILLION UNITS) 162

TABLE 133 PASSENGER CARS TIRE RETREADING MARKET, BY REGION, 2023-2028 (MILLION UNITS) 162

TABLE 134 PASSENGER CARS TIRE RETREADING MARKET, BY REGION, 2019-2022 (USD MILLION) 162

TABLE 135 PASSENGER CARS TIRE RETREADING MARKET, BY REGION, 2023-2028 (USD MILLION) 163

12.3 LIGHT COMMERCIAL VEHICLES 163

12.3.1 INCREASED MILES DRIVEN BY LIGHT COMMERCIAL VEHICLES TO DRIVE MARKET 163

TABLE 136 LIGHT COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2019-2022 (MILLION UNITS) 163

TABLE 137 LIGHT COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2023-2028 (MILLION UNITS) 164

TABLE 138 LIGHT COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2019-2022 (USD MILLION) 164

TABLE 139 LIGHT COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2023-2028 (USD MILLION) 164

12.4 HEAVY COMMERCIAL VEHICLES 165

12.4.1 HIGH COST OF NEW TIRES TO DRIVE DEMAND FOR RETREADED TIRES 165

TABLE 140 HEAVY COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2019-2022 (MILLION UNITS) 165

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

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

www.scotts-international.com

TABLE 141 HEAVY COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2023-2028 (MILLION UNITS) 165

TABLE 142 HEAVY COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2019-2022 (USD MILLION) 166

TABLE 143 HEAVY COMMERCIAL VEHICLES TIRE RETREADING MARKET, BY REGION, 2023-2028 (USD MILLION) 166

?

13 AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE AND RIM SIZE 167

13.1 INTRODUCTION 168

13.1.1 INDUSTRY INSIGHTS 168

FIGURE 37 AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE, 2023 VS. 2028 (USD MILLION) 168

TABLE 144 AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE, 2019-2022 (MILLION UNITS) 169

TABLE 145 AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE, 2023-2028 (MILLION UNITS) 169

TABLE 146 AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 169

TABLE 147 AUTOMOTIVE TIRE OE MARKET, BY VEHICLE TYPE, 2023-2028 (USD MILLION) 169

13.2 PASSENGER CARS 170

13.2.1 DECREASING COST OF RIMS DUE TO INCREASED COMPETITION TO DRIVE MARKET 170

TABLE 148 PASSENGER CAR TIRE OE MARKET, BY RIM SIZE, 2019-2022 (MILLION UNITS) 170

TABLE 149 PASSENGER CAR TIRE OE MARKET, BY RIM SIZE, 2023-2028 (MILLION UNITS) 170

TABLE 150 PASSENGER CAR TIRE OE MARKET, BY RIM SIZE, 2019-2022 (USD MILLION) 171

TABLE 151 PASSENGER CAR TIRE OE MARKET, BY RIM SIZE, 2023-2028 (USD MILLION) 171

13.2.2 13-15" 171

TABLE 152 13-15": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 172

TABLE 153 13-15": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 172

TABLE 154 13-15": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 172

TABLE 155 13-15": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 173

13.2.3 16-18" 173

TABLE 156 16-18": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 173

TABLE 157 16-18": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 174

TABLE 158 16-18": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 174

TABLE 159 16-18": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 174

13.2.4 19-21" 175

TABLE 160 19-21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 175

TABLE 161 19-21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 175

TABLE 162 19-21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 175

TABLE 163 19-21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 176

13.2.5 >21" 176

TABLE 164 >21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 176

TABLE 165 >21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 177

TABLE 166 >21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 177

TABLE 167 >21": PASSENGER CAR TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 177

13.3 LIGHT COMMERCIAL VEHICLES 178

13.3.1 USE OF LIGHTWEIGHT MATERIALS IN RIMS WITH IMPROVED TECHNOLOGY TO DRIVE MARKET 178

TABLE 168 LIGHT COMMERCIAL VEHICLES TIRE OE MARKET, BY RIM SIZE, 2019-2022 (MILLION UNITS) 178

TABLE 169 LIGHT COMMERCIAL VEHICLES TIRE OE MARKET, BY RIM SIZE, 2023-2028 (MILLION UNITS) 178

TABLE 170 LIGHT COMMERCIAL VEHICLES TIRE OE MARKET, BY RIM SIZE, 2019-2022 (USD MILLION) 179

TABLE 171 LIGHT COMMERCIAL VEHICLES TIRE OE MARKET, BY RIM SIZE, 2023-2028 (USD MILLION) 179

13.3.2 13-15" 180

TABLE 172 13-15": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 180

TABLE 173 13-15": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 180

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

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

www.scotts-international.com

TABLE 174□13-15": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□181

TABLE 175□13-15": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□181

13.3.3□16-18"□181

TABLE 176□16-18": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□182

TABLE 177□16-18": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□182

TABLE 178□16-18": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□182

TABLE 179□16-18": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□183

13.3.4□19-21"□183

TABLE 180□19-21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□183

TABLE 181□19-21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□184

TABLE 182□19-21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□184

TABLE 183□19-21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□184

13.3.5□>21"□185

TABLE 184□>21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□185

TABLE 185□>21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□185

TABLE 186□>21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□186

TABLE 187□>21": LIGHT COMMERCIAL VEHICLE TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□186

13.4□BUSES□186

13.4.1□RISING DEMAND FOR ELECTRIC BUSES WITH VARIOUS RIM SIZES TO DRIVE MARKET□186

TABLE 188□BUSES: TIRE OE MARKET, BY RIM SIZE, 2019-2022 (MILLION UNITS)□187

TABLE 189□BUSES TIRE OE MARKET, BY RIM SIZE, 2023-2028 (MILLION UNITS)□187

TABLE 190□BUSES TIRE OE MARKET, BY RIM SIZE, 2019-2022 (USD MILLION)□187

TABLE 191□BUSES TIRE OE MARKET, BY RIM SIZE, 2023-2028 (USD MILLION)□188

13.4.2□16-18"□188

TABLE 192□16-18": BUS TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□188

TABLE 193□16-18": BUS TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□189

TABLE 194□16-18": BUS TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□189

TABLE 195□16-18": BUS TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□189

13.4.3□19-21"□190

TABLE 196□19-21": BUS TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□190

TABLE 197□19-21": BUS TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□190

TABLE 198□19-21": BUS TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□190

TABLE 199□19-21": BUS TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□191

13.4.4□>21"□191

TABLE 200□>21": BUS TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□191

TABLE 201□>21": BUS TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□192

TABLE 202□>21": BUS TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION)□192

TABLE 203□>21": BUS TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION)□192

13.5□TRUCKS□193

13.5.1□INCREASE IN LAST-MILE DELIVERIES AND INFRASTRUCTURE DEVELOPMENT TO DRIVE MARKET□193

TABLE 204□TRUCK TIRE OE MARKET, BY RIM SIZE, 2019-2022 (MILLION UNITS)□193

TABLE 205□TRUCK TIRE OE MARKET, BY RIM SIZE, 2023-2028 (MILLION UNITS)□193

TABLE 206□TRUCK TIRE OE MARKET, BY RIM SIZE, 2019-2022 (USD MILLION)□193

TABLE 207□TRUCK TIRE OE MARKET, BY RIM SIZE, 2023-2028 (USD MILLION)□194

13.5.2□16-18"□194

TABLE 208□16-18": TRUCK TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS)□194

TABLE 209□16-18": TRUCK TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS)□194

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

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

www.scotts-international.com

TABLE 210 16-18": TRUCK TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 195

TABLE 211 16-18": TRUCK TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 195

13.5.3 19-21" 195

TABLE 212 19-21": TRUCK TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 196

TABLE 213 19-21": TRUCK TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 196

TABLE 214 19-21": TRUCK TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 196

TABLE 215 19-21": TRUCK TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 197

13.5.4 >21" 197

TABLE 216 >21": TRUCK TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 197

TABLE 217 >21": TRUCK TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 198

TABLE 218 >21": TRUCK TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 198

TABLE 219 >21": TRUCK TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 198

14 AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE 199

14.1 INTRODUCTION 200

14.1.1 INDUSTRY INSIGHTS 200

FIGURE 38 AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE, 2023 VS. 2028 (USD MILLION) 200

TABLE 220 AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE, 2019-2022 (MILLION UNITS) 201

TABLE 221 AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE, 2023-2028 (MILLION UNITS) 201

TABLE 222 AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE, 2019-2022 (USD MILLION) 201

TABLE 223 AUTOMOTIVE TIRE OE MARKET, BY TIRE TYPE, 2023-2028 (USD MILLION) 201

TABLE 224 PROS AND CONS OF RADIAL AND BIAS TIRES 202

14.2 RADIAL TIRES 202

14.2.1 RISING SALES OF COMMERCIAL VEHICLES TO DRIVE DEMAND FOR RADIAL TIRES 202

TABLE 225 RADIAL TIRES OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 203

TABLE 226 RADIAL TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 203

TABLE 227 RADIAL TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 203

TABLE 228 RADIAL TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 204

14.2.2 TUBE TIRES 204

TABLE 229 TUBE RADIAL TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 204

TABLE 230 TUBE RADIAL TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 205

TABLE 231 TUBE RADIAL TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 205

TABLE 232 TUBE RADIAL TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 205

14.2.3 TUBELESS TIRES 206

TABLE 233 TUBELESS RADIAL TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 206

TABLE 234 TUBELESS RADIAL TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 206

TABLE 235 TUBELESS RADIAL TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 206

TABLE 236 TUBELESS RADIAL TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 207

14.3 BIAS TIRES 207

14.3.1 RISING SALES OF TRACTORS AND TRUCKS TO DRIVE DEMAND FOR BIAS TIRES 207

TABLE 237 BIAS TIRES OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 208

TABLE 238 BIAS TIRES OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 208

TABLE 239 BIAS TIRES OE MARKET, BY REGION, 2019-2022 (USD MILLION) 208

TABLE 240 BIAS TIRES OE MARKET, BY REGION, 2023-2028 (USD MILLION) 209

15 AUTOMOTIVE TIRE OE MARKET, BY REGION 210

15.1 INTRODUCTION 211

FIGURE 39 AUTOMOTIVE TIRE MARKET: BY REGION, 2023-2028 211

TABLE 241 AUTOMOTIVE TIRE OE MARKET, BY REGION, 2019-2022 (MILLION UNITS) 211

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

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

www.scotts-international.com

TABLE 242 AUTOMOTIVE TIRE OE MARKET, BY REGION, 2023-2028 (MILLION UNITS) 212

TABLE 243 AUTOMOTIVE TIRE OE MARKET, BY REGION, 2019-2022 (USD MILLION) 212

TABLE 244 AUTOMOTIVE TIRE OE MARKET, BY REGION, 2023-2028 (USD MILLION) 212

FIGURE 40 INDUSTRY INSIGHTS 213

**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)

**Automotive Tires Market for OE & Replacement By Rim (13-15, 16-18, 19-21,>21"), Aspect Ratio(<60, 60-70, >70), Section Width (<200, 200-230,>230 mm), Season (Summer, Winter-Studded Non-Studded & All Season), Vehicle Type, Retreading & Region - Global Forecast to 2028**

Market Report | 2023-09-04 | 340 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"/>

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

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

www.scotts-international.com

Zip Code\*

Country\*

Date

2026-02-23

Signature

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

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

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