

## **Tractor Tires Market - Global Outlook & Forecast 2024-2029**

Market Report | 2024-12-10 | 303 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global tractor tires market by shipments are expected to grow at a CAGR of 5.06% from 2023 to 2029.

#### **Recent Developments in the Global Tractor Tires Market**

- Firestone Ag, a division of Bridgestone Americas, has launched a new line of premium Bridgestone tractor tires for US and Canadian markets in August 2024. These tires, designed with advanced tread and lug technology, offer enhanced durability, improved soil health, and fuel-efficient traction, delivering up to 45% more wear life. Available from September 1, 2024, the VX, VT, and VX-R TRACTOR tires cater to diverse farming needs with a 10-year limited warranty.
- Hercules Tire and Rubber Company, a subsidiary of American Tire Distributors, launched the AG-TRAC F-2 in April 2024, a versatile tire engineered for superior performance across various agricultural surfaces. Available in two 16" sizes for 2WD front tractor wheels, this robust tire features durable construction, enhanced flotation, and excellent steering response, ensuring optimal traction and control in diverse farming environments.
- On May 1, 2023, Trelleborg Wheel Systems announced the successful completion of its acquisition by The Yokohama Rubber Co., Ltd. for EUR2,074 million. The newly formed entity, Yokohama TWS, will maintain its existing organizational structure while enhancing Yokohama's position as a global leader in the off-highway tire market, complemented by Trelleborg's portfolio of brands and services.
- On March 17, 2023, CEAT Specialty agreed with CNH Industrial to supply FARMAX agricultural radial tires for Case IH and New Holland tractors in Brazil and Argentina. This collaboration follows rigorous audits and testing, affirming CEAT's tire quality and its investment in advanced technologies, aiming for long-term partnership and enhanced agricultural productivity.
- In 2022, Titan International Inc. and Kubota Tractor Corp. formalized an exclusivity agreement for select sizes of Titan's Trac Loader II tires, designed for compact and utility tractors. This collaboration marks Titan's inaugural OEM-branded tire offering and represents their second exclusive partnership with Kubota, following their previous association with the Goodyear brand R14T.

#### **MARKET TRENDS & OPPORTUNITIES**

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## Technological Advancements in Tire Manufacturing

The tire manufacturing industry is undergoing a transformative shift, driven by advancements in intelligent automation, 3D printing, and sustainable materials. Technologies like AI and IoT are enhancing efficiency, enabling real-time monitoring, and reducing operational downtime, as seen with Michelin and Bridgestone's innovations. The introduction of smart tire technologies and airless tires, such as those by SMART Tire Company, addresses critical needs in the agricultural sector, ensuring durability and sustainability. These advancements not only improve product performance but also respond to the growing demand for eco-friendly solutions in tractor tires.

## Expansion of Tractor Tire Markets in Emerging Economies

The global agricultural landscape is undergoing rapid transformation, largely influenced by urbanization, mechanization, and growing food demand. A key element in this shift is the expansion of the tractor tires market, particularly in emerging economies. Rising mechanization in agriculture, with nations like India, Vietnam, and Bangladesh recording over 5% CAGR in farm mechanization from 2020 to 2023, is driving demand for high-performance tractor tires. Government support, such as India's agricultural mechanization policies and Brazil's National Rural Development Program, has further spurred tractor sales and consequently, tire demand. Additionally, rural infrastructure improvements and strategic partnerships with local manufacturers are enhancing market accessibility, positioning emerging economies as growth hubs for advanced tire technologies.

## Government Support and Subsidies for Modernizing Agriculture

Government incentives and subsidies are crucial in driving agricultural modernization, spurring demand for tractors and related equipment globally. Programs like India's Sub-Mission on Agricultural Mechanization (SMAM) provide substantial financial support, raising tractor sales in 2023 creating heightened demand for tractor tires, and supporting the tractor tires industry. In North America, initiatives like the Environmental Quality Incentives Program (EQIP) encourage the adoption of modern machinery, leading to a projected 2.79% annual growth in the tractor tires market. Similarly, Europe's Common Agricultural Policy (CAP) supports farmers in upgrading to advanced equipment and pushing tractor registrations in European nations. In emerging markets like Vietnam and Nigeria, government schemes are transforming agriculture, driving demand for tractor tires as mechanization expands.

## SEGMENTATION INSIGHTS

### INSIGHTS BY PRODUCT TYPE

The global tractor tires market is broadly categorized into two types: bias and radial tires. Currently, radial tires hold a leading position and this dominance stems from several key advantages, including superior ride comfort and the ability to operate efficiently at lower air pressures. The distinctive construction of radial tires, where rubber is molded around dual steel belts along the tire's circumference, significantly boosts puncture resistance, driving up demand. Furthermore, globally, the shift towards radial tires reflects broader changes in agricultural practices, as farmers increasingly seek solutions that enhance operational efficiency and sustainability. For example, radial tires are favored not only for their improved performance but also for their capacity to reduce soil compaction, a critical factor in sustainable farming. As agriculture adopts more eco-friendly practices, the focus on reducing environmental impact is pushing manufacturers to innovate with greener materials and technologies. These advancements are particularly important in regions with stringent environmental regulations, and they are expected to drive global demand for radial tires. Leading manufacturers such as Michelin, Trelleborg, and Bridgestone have already introduced tire lines designed to meet both performance and environmental standards, underscoring the market's shift toward sustainability.

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## Segmentation by Product Type

- Radial
- Bias

## INSIGHTS BY SALES CHANNEL

The global tractor tires market experiences a balanced sales distribution between Original Equipment Manufacturers (OEMs) and aftermarket channels. However, the aftermarket segment is gaining traction due to growing consumer awareness and the expansion of tire retail networks. In 2023 the aftermarket segment held the largest segmental industry share, supported by farmers' increased recognition of the importance of maintaining tire performance to prevent issues such as soil compaction and reduced crop yields.

Tires in poor condition can lead to a 10-20% reduction in crop productivity, a significant concern as global farming activities expand. This has driven a surge in demand for tire replacements, particularly in regions like North America and Europe, where farmers are increasingly focused on optimizing their operational efficiency. For instance, in 2023, the European tractor tire aftermarket grew by nearly 3%, reflecting a trend toward frequent replacements to maintain equipment efficiency. Moreover, the emphasis on sustainable agricultural practices has led farmers to invest more in premium, eco-friendly tire solutions. Up to 30% of soil degradation can be linked to improper tire pressure or low-quality tires, which is prompting regulatory bodies to push for stricter standards in agricultural equipment. Manufacturers are responding by developing tires with improved fuel efficiency, lower emissions, and longer lifespans, further driving the growth of the aftermarket sector.

## Segmentation by Sales Channel

- OEMs
- Aftermarket

## GEOGRAPHICAL ANALYSIS

The global tractor tires market is witnessing significant growth, driven by rising demand for agricultural mechanization, advancements in tire technology, and the increasing need for efficient farming solutions. Key geographical regions contributing to this market include Asia-Pacific, North America, Europe, Latin America, and Middle East & Africa, with each region displaying distinct trends and market dynamics. Asia-Pacific is emerging as a rapidly growing tractor tires market, driven by expanding agricultural activities in countries like China, India, and Southeast Asia. The region's growth is supported by increasing government investments in farm mechanization to boost agricultural productivity. In India, for instance, tractor sales have been rising consistently, and this has a direct impact on the demand for tractor tires. Furthermore, the North American tractor tires industry, particularly in the U.S. and Canada, is characterized by mature farming practices and high adoption of precision agriculture. The U.S. leads in market size, driven by its well-established agricultural sector and strong demand for technologically advanced tires that enhance fuel efficiency and durability.

## Segmentation by Geography

- APAC
  - o□India
  - o□China
  - o□Thailand
  - o□Malaysia
  - o□Australia
  - o□Indonesia
- North America

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- o Mexico
- o Argentina
- Middle East & Africa
- o Turkey
- o South Africa
- o Egypt

## VENDOR LANDSCAPE

The global tractor tires market features a dynamic and highly competitive vendor landscape, driven by the presence of both established multinational companies and emerging regional players. The competition in this market is shaped by continuous innovations, product differentiation, and the ability to meet the evolving needs of the agricultural sector. Key vendors in the global tractor tires market include Bridgestone, Michelin, Goodyear, Trelleborg, and Continental, among others, all of which have a significant presence globally. Bridgestone Corporation, for example, commands a considerable tractor tires market share due to its strong global distribution network and advanced tire technologies. Its investment in research and development has resulted in durable, high-performance tires that cater to a range of agricultural applications. In 2023, Bridgestone launched its new VT-Tractor tire series, designed for fuel efficiency and better soil protection, which has gained traction in key markets such as North America and Europe.

Similarly, Michelin has strengthened its position in the tractor tires market with innovations like Ultraflex Technology, which offers enhanced load-bearing capacity and soil conservation, a feature increasingly demanded by farmers globally. Michelin's tractor tire segment saw a growth of 5.2% in revenue in 2023, driven by strong sales in Europe and APAC regions. Furthermore, another significant player, Trelleborg, focuses on providing tires that optimize farming productivity. In 2023, Trelleborg's agricultural division reported a 4% growth in revenue, supported by rising demand for sustainable farming solutions. Trelleborg's tires are designed to minimize soil compaction, a critical issue for farmers aiming to increase crop yields.

## Key Company Profiles

- Alliance Tire Group
- Balkrishna Industries Limited (BKT)
- Bridgestone
- Michelin
- Titan International
- Trelleborg

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## Other Prominent Vendors

- Continental
- Mitas
- Carlisle
- Vredestein
- Galaxy
- Linglong
- Hankook
- Pirelli
- Toyo Tires
- CEAT
- Yokohama
- Cultor
- Kleber
- Kenda Rubber Industrial Co., Ltd
- Kormoran
- Nokian Tyres plc
- MRF
- Dunlop
- Sava
- Cooper
- Camso
- JK Tyre
- Double Coin
- Prinx Chengshan
- Shandong Hengfeng Rubber & Plastic Co., Ltd.
- Belshina
- Petlas
- Sime Tyres
- Deestone Ltd.
- ZC Rubber (Zhongce Rubber Group Co., Ltd.)
- Armstrong Tires

## KEY QUESTIONS ANSWERED:

1. How big is the global tractor tires market?
2. Which region holds the most significant global tractor tires market share?
3. What are the significant trends in the tractor tires industry?
4. What is the growth rate of the global tractor tires market?
5. Who are the key players in the global tractor tires market?

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