

Europe Telehandler Tire Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Report description:

Europe Telehandler Tire Market was valued at USD 765.3 million in 2024 and is estimated to grow at a CAGR of 4.5% to reach USD 1.1 billion by 2034. This growth trajectory reflects the dynamic evolution in Europe's construction industry, which has been instrumental in boosting the demand for telehandler tires. As the region experiences increasing infrastructure developments and urban renovation projects, the need for versatile and durable telehandler tires continues to rise. Operators are increasingly prioritizing equipment reliability, reduced downtime, and enhanced fuel efficiency—all of which are directly influenced by the quality and performance of tires.

Technological innovations are shaping the market, particularly through the integration of the Internet of Things (IoT) and advanced tire monitoring systems. These smart solutions are becoming an integral part of modern telehandler operations, offering real-time data insights that improve tire lifecycle management and ensure safety compliance. Such systems are not only gaining traction among fleet managers but are also beginning to align closely with emerging operational standards, potentially paving the way for future regulatory expectations. As a result, manufacturers are actively developing tires equipped with sensors and digital interfaces to meet this growing market demand. The overall focus is shifting toward enhancing tire intelligence and reducing the total cost of ownership through predictive maintenance and performance tracking.

By tire type, the market is segmented into solid, radial, bias, and others. Among these, the radial tire segment held the highest revenue share in 2024, surpassing USD 400 million, and is projected to exceed USD 600 million by 2034. Radial tires have become the preferred choice in the telehandler industry due to their superior load-bearing capacity and thermal management properties. They offer enhanced durability, improved traction, and fuel efficiency by minimizing rolling resistance. Their unique construction, with cords positioned at 90 degrees to the direction of travel, not only strengthens the tire structure but also delivers better grip and longevity.

In terms of sales channels, the market is categorized into OEM and aftermarket. The aftermarket segment dominated with around 59% market share in 2024 and is set to witness strong growth through the forecast period. This dominance is primarily driven by the increasing need for tire replacements due to heavy wear and tear in demanding environments. Additionally, retreading services are becoming increasingly popular, offering a cost-effective and environmentally responsible alternative to complete tire

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replacements. The advancement in retreading technologies allows for extending tire carcass life without compromising on performance, making it an attractive solution for fleet operators.

When analyzed by tire size, the market includes tires below 20 inches, 20-30 inches, and those above 30 inches. The 20-30 inches segment recorded over USD 420 million in revenue in 2024. This size range is widely used in medium-capacity telehandlers employed in various sectors such as construction, industrial handling, and agriculture. The compact design and operational efficiency of these tires make them particularly suitable for urban projects where space constraints and maneuverability are critical factors.

Based on application, the Europe telehandler tire industry is segmented into construction & mining, rental, agriculture, and industrial sectors. In 2024, the construction & mining application led the market with a revenue of USD 300 million. Telehandlers are extensively utilized in these fields due to their versatility and lifting capabilities. However, these applications expose tires to extreme loads and hazardous conditions, which necessitate high-performance tires with resistance to punctures, cuts, and abrasive surfaces. The need for robust and long-lasting tire designs is more pressing in this segment, thus contributing significantly to the overall market growth.

Regionally, Western Europe emerged as the leading contributor, accounting for over 40% of the total market share in 2024. Among the Western countries, Germany stood out as the primary revenue generator and is projected to surpass 250,000 units in telehandler tire shipments by 2034. The country benefits from a strong base of construction equipment manufacturers and a mature construction industry. This provides consistent demand from both OEMs and aftermarket service providers, creating a vibrant ecosystem for telehandler tire distribution.

Key players shaping the competitive landscape in the European telehandler tire industry include BKT, Apollo Tyres, Bridgestone, Continental, Michelin, Goodyear, Mitas, Trelleborg Wheel Systems, Nokian Tyres, and Yokohama Off-Highway Tires. These companies are investing heavily in material science, tread design, and value-added services to meet evolving customer expectations. A major area of development lies in the creation of tires suitable for electric-powered telehandlers, which present unique challenges in terms of weight distribution and torque management.

The market is also witnessing a shift toward sustainability, with manufacturers focusing on reducing rolling resistance and enabling full tire recyclability. These initiatives align with Europe's environmental goals and resonate with buyers who value green innovations and long-term operational savings.

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