

Global and European Tire Materials Market Outlook 2025–2035

The global tire materials industry is estimated at USD 86.44 billion in 2025 and projected to reach USD 128.20 billion by 2035, growing at a CAGR of 4.0%

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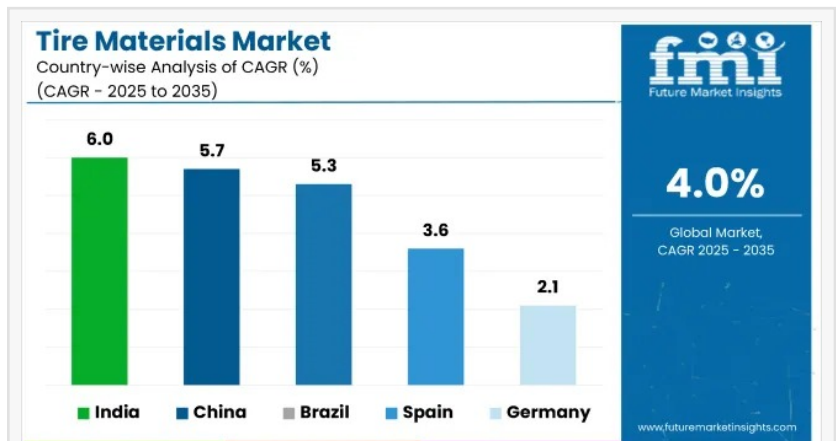
EINPresswire.com/ -- The global [tire materials market](#), valued at USD 74.77 billion in 2020, continues its upward trajectory as rising vehicle production, electrification, regulatory shifts, and sustainability-driven innovation reshape mobility worldwide. The market expanded to USD 78.96 billion by 2022, and new projections forecast a strong 4.0% CAGR from 2025 to 2035, culminating in a total market value of USD 127.9 billion by 2035.

Across APAC, Europe, the USA, and Saudi Arabia, demand dynamics are accelerating as countries intensify investments in electric vehicles (EVs), commercial transportation, green tires, and high-performance material technologies.

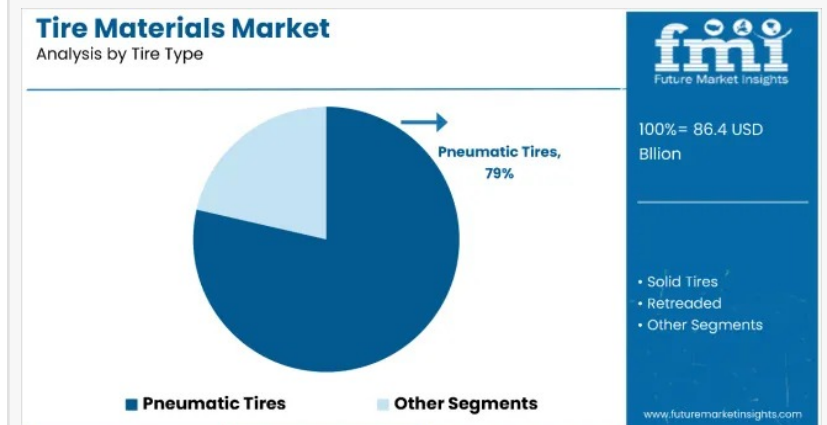
Natural Rubber and Pneumatic Tires Dominate Market Structure

Natural rubber, accounting for 23.5% of the material-type segment, continues to outperform synthetic alternatives due to its exceptional tear resistance, fatigue crack resistance, durability, and abrasion strength. Its sustainable sourcing from *Hevea brasiliensis* and increasing adoption in green tire manufacturing are strengthening its global foothold.

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Tire Materials Market



Tire Materials Market Size

Pneumatic tires remain the industry's cornerstone, commanding 78.6% of all tire types. Their widespread utility—from passenger cars to heavy commercial vehicles (HCVs), agriculture machinery, mining fleets, and aviation—is driving robust consumption of rubber compounds, fillers, and construction materials.

Regional Growth Leaders: APAC, Europe, USA, and Saudi Arabia

APAC: China, India, Southeast Asia

- China dominates East Asia with a 55.2% share, supported by a booming automotive sector, rapid EV adoption, and massive industrial and infrastructure projects.
- China's tire materials sales will reach USD 27.18 billion by 2034, growing at 5.4% CAGR.
- India, propelled by strong economic expansion and rising middle-class vehicle ownership, is projected to grow at a 6.0% CAGR.

Europe: Germany, Spain

- Germany, holding 33.2% of Western Europe, remains a global engineering and automotive innovation hub.
- The country's shift toward electric mobility, advanced composites, and sustainable tire compounds will drive a 2.1% CAGR to USD 5.26 billion by 2034.
- Spain, benefiting from automotive manufacturing recovery and export momentum, is projected at 3.6% CAGR.

United States

The USA captures 75.6% of North America's market and remains a global powerhouse with:

- High vehicle ownership rates
- Strong EV market growth
- Expanding commercial transportation networks

The U.S. tire materials market is projected to reach USD 15.51 billion by 2034, growing at 2.8% CAGR.

However, U.S. regulatory pressure on 6PPD, including:

- California DTSC Priority Product designation,
- Ongoing EPA TSCA evaluation,

is urging manufacturers toward safer antiozonant alternatives, encapsulation technologies, and

advanced material R&D.

Saudi Arabia & Middle East

Saudi Arabia's expanding industrial, construction, and logistics initiatives under Vision 2030 are stimulating demand for tires and supporting materials. The region's surge in HCV and off-highway equipment adoption positions it as a high-potential emerging market for performance tire compounds, fillers, and natural rubber imports.

Key Drivers Increasing Market Velocity

1. Rising Vehicle PARC to 1.4 Billion (FY2023)

Frequent tire replacement cycles (2–3 years) and global growth in vehicle ownership significantly accelerate tire material consumption.

2. Regulatory Push for Low-Rolling-Resistance “Green Tires”

- EU tire labeling (A–E categories)
- Japan's voluntary labeling
- USA initiatives for fuel-efficient tires

This transition is boosting demand for silica-reinforced compounds, which can reduce CO₂ emissions by up to 7%.

3. EV Boom Reshaping Tire Chemistry

EVs require:

- Higher load-bearing capacity
- Lower rolling resistance
- Advanced heat resistance

This has led to increased usage of silica, high-performance synthetic rubbers, and engineered polymers.

4. Alternative Natural Rubber Sources

Manufacturers such as Bridgestone, Continental, Apollo, and Pirelli are investing heavily in:

- Guayule
- Russian Dandelion

These innovations aim to diversify supply and reduce strain on Southeast Asian plantations.

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Challenges Impacting Supply Chains

Trade Tensions & Anti-Dumping Duties

- U.S. duties on Chinese truck/bus tires (20.98%–63.34% countervailing; 9%–22.57% antidumping).
- India and EU expanding similar duties.

These measures affect tire material demand and shift sourcing strategies.

Environmental Regulations on Carbon Black & Plantation Practices

Restrictions across North America, Europe, and ASEAN countries are raising compliance costs and increasing demand for bio-based and recyclable materials.

Competitive Landscape

Tier 1 companies hold 40–45% of global share, led by:

Bekaert, Birla Carbon, Cabot Corporation, Evonik Industries, ExxonMobil, Solvay, PetroChina, Lanxess.

Tier 2 players such as JSR, Kuraray, and others maintain strong regional presence with specialized technologies and regulatory compliance strength.

Outlook Through 2035

With global miles driven expected to double to 19 trillion and annual tire sales projected to reach 3 billion units, demand for tire materials is set to expand significantly.

The next decade will see:

- Rapid EV-driven material innovation
- Growth of green tires and recyclable compounds
- Expansion in APAC and the Middle East industrial sectors
- Global supply chain diversification and sustainability upgrades

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