

Agricultural Tires Market to Reach USD 16.86 Billion by 2035, Growing at 6.30% CAGR

Asia-Pacific held the dominant position in the Agricultural Tires Market, contributing roughly 40.5% of 2025 revenue.

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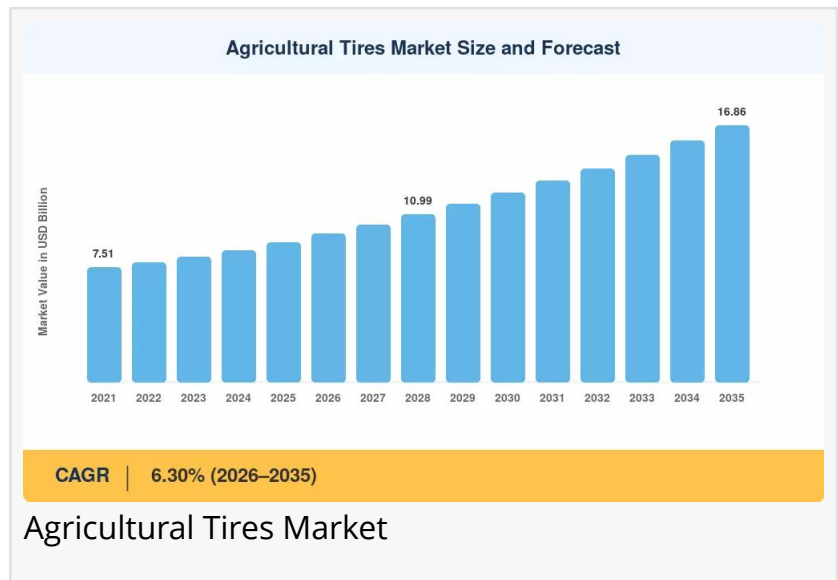
According to Market Research Future, the [Agricultural Tires Market](#) is projected to climb from USD 9.73 billion in 2026 to USD 16.86 billion by 2035, registering a compound annual

growth rate of 6.30% during 2026 to 2035, driven by Adoption of precision agriculture technologies enhances demands. This steady growth reflects the increasing sophistication of modern farming operations, where specialized tires have become critical components for maximizing productivity, preserving soil health, and enabling the precise field operations demanded by contemporary agricultural practices.

Market Overview

Agricultural tires are specialized pneumatic tires designed for use on tractors, combine harvesters, sprayers, trailers, and other farm implements operating in diverse field conditions. Unlike standard automotive tires, agricultural tires feature deep tread patterns for superior traction, robust sidewalls for heavy load support, and specialized constructions that minimize soil compaction while maximizing flotation across varying terrain. The market encompasses bias, radial, and advanced IF/VF radial tire constructions, catering to a wide spectrum of equipment from small utility tractors to high-horsepower articulated machines.

The key growth drivers propelling this market expansion include rising global farm mechanization, which directly expands the active fleet of tractors and self-propelled machinery worldwide. As agricultural operations scale up and become more efficiency-driven, the need for reliable and heavy-duty tires continues to rise, ensuring sustained demand. The increasing adoption of precision agriculture technologies creates demand for specialized tires compatible with GPS-guided machinery and variable field conditions. Additionally, surging replacement



demand from the aging global tractor fleet anchors baseline demand, with the aftermarket accounting for a substantial market share .

Technological developments are reshaping the agricultural tire landscape at an accelerating pace. The agricultural tire market is witnessing a significant trend toward the integration of precision farming technologies, which is reshaping design and performance requirements . The growing adoption of radial tires, coupled with innovations in rubber compounds and tread patterns, is significantly improving fuel efficiency and extending tire lifespan . The integration of smart tire technologies, including tire pressure monitoring systems, is further enhancing operational efficiency by minimizing downtime and enabling predictive maintenance . The [Off The Road Tire Market](#) encompasses agricultural tires as a major segment, while the [Farm Tractor Tire Market](#) focuses specifically on the tractor application that generates the majority of demand.

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Market Segmentation

The agricultural tires market is segmented based on sales channel, application, tire construction, rim size, equipment horsepower class, and inflation-technology compatibility to provide comprehensive insights into the industry landscape.

By Sales Channel: The market is categorized into OEM and Replacement/Aftermarket channels. The aftermarket accounts for a dominant 70.74% market share in 2025, as farmers' strong inclination to extend equipment lifespan, particularly during high interest-rate periods, reinforces this dominance . OEM channels are on a steady growth path through 2035, buoyed by Ukraine reconstruction and policy-supported fleet renewal in Latin America . The interplay between defensive aftermarket strength and revitalized OEM orders underscores balanced growth drivers across the market.

By Application: The market is divided into Tractors, Combine Harvesters, Sprayers, Trailers, Loaders & Telehandlers, and Other Implements. Tractors generated 56.12% of the agricultural tires market in 2025, cementing their centrality in daily farm tasks . Sprayers, although representing a smaller base, are forecast for accelerated growth through the forecast period, sharpening demand for narrow-section VF tires compatible with high-clearance machinery . Combine harvesters and trailers capture residual shares yet set distinct performance benchmarks that shape tread design and carcass rigidity.

By Tire Construction: The market is segmented into Bias, Radial, and IF/VF Radial constructions. Radial tires dominated the global agricultural tire market in 2026, accounting for approximately 53% of total market share, driven by superior operational efficiency, enhanced durability, and improved soil protection compared to conventional bias variants . IF designs allow one-fifth

higher load at identical pressure, and VF designs expand the margin to two-fifths, accelerating technology diffusion . Standards codified by the Tire & Rim Association have harmonized inflation protocols, accelerating global adoption .

By Rim Size: The market serves segments of Less Than 20 Inches, 20–30 Inches, 30–40 Inches, and Above 40 Inches. Larger rim sizes are gaining traction as high-horsepower equipment demands increased load capacity and stability.

By Equipment Horsepower Class: The market covers Less Than 30 HP, 30–70 HP, 70–150 HP, and Above 150 HP segments. The >150 HP class accelerates the push toward VF specifications as large commercial farms adopt higher-capacity machinery .

By Inflation-Technology Compatibility: The market is divided into Standard tires and CTIS-Ready/Smart Tires. CTIS-ready and smart tire solutions are gaining traction as precision agriculture requires real-time pressure adjustment for optimized field performance.

By Region: The market analysis covers North America, Europe, South America, Asia Pacific, and the Middle East and Africa.

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Regional Analysis

Asia-Pacific held 37.41% of agricultural tires market share in 2025, propelled by China and India, which together delivered more than two-fifths of global equipment growth . Many provincial subsidies address labor scarcity by encouraging VF-equipped tractors that protect increasingly valuable arable land. Japan's radial-tire uptake underscores the region's technological maturity, supported by advanced R&D clusters and stringent sustainability standards . Favourable government initiatives aimed at enhancing agricultural productivity and promoting farm mechanization are accelerating market growth . The region is expected to maintain its leading position with the fastest growth trajectory through 2035.

South America is projected as one of the fastest-growing regions, with a CAGR of approximately 6.09% between 2026 and 2031 . Following a contraction in Brazil's machinery sales during 2024, policy steps such as Moderfrota coupled with Argentina's domestic manufacturing content are revitalizing demand . Strategic collaborations, exemplified by Trelleborg's tie-up with John Deere's extensive dealership grid, channel advanced low-compaction tires to small and mid-sized growers . The region benefits from expanding agricultural frontiers and rising mechanization rates.

North America exhibits high replacement ratios, driven by extensive mechanized farming operations and a large agricultural equipment fleet. The region benefits from early adoption of

advanced tire technologies and strong OEM presence. The United States is a key market with significant demand for high-horsepower tractor tires and precision farming solutions. The Canada market demonstrates steady growth supported by large-scale commercial farming operations.

Europe demonstrates steady growth with high replacement ratios and a strong emphasis on sustainability and technological innovation . EU machinery regulations effective January 2027 will elevate compliance thresholds for digital readiness and safety, favoring CTIS and sensor-equipped tires . The region's focus on soil preservation and environmental compliance drives adoption of IF/VF radial technologies. Ukraine reconstruction plans could spark OEM demand as farming equipment stocks are replenished .

The Middle East and Africa remain under-mechanized yet display gradual uptake, notably in irrigation-dependent cereals where radial flotation tires provide clear agronomic benefits . Regional heterogeneity accentuates multiple demand pockets, solidifying the growth arc through 2035.

Competitive Landscape and Key Players

The agricultural tires market is highly competitive, featuring a mix of established global tire manufacturers, specialized agricultural tire producers, and regional players. The competitive landscape is characterized by technological innovation, strategic portfolio expansion, and market consolidation.

Key players operating in this market include Bridgestone Corporation, Michelin, Continental AG, Balkrishna Industries Ltd (BKT), Apollo Tyres Ltd, Yokohama Off-Highway Tires, Trelleborg Wheel Systems, CEAT, and Titan International Inc.

Strategic developments are reshaping the competitive landscape. Yokohama Off-Highway Tires completed the acquisition of a regional agricultural tire distributor in Latin America in August 2024, strengthening its aftermarket presence and distribution network in key farming markets in Brazil and Argentina . In August 2024, Bridgestone introduced VX-TRACTOR, VT-TRACTOR, and VX-R TRACTOR portfolios in the United States, promising longer wear life and 40% higher load capacity . Trelleborg's agreement with John Deere granted access to more than 300 Brazilian dealerships, positioning CTIS-ready tires for new tractor deliveries .

Innovation and technology initiatives are accelerating across the industry. In 2025, Alliance Tire introduced the IF1400/45R32 CFO Agriflex 372, recognized as the largest agricultural tire by inflation volume, specifically designed for heavy tractors and precision farming applications . Michelin launched a new generation of IF/VF agricultural radial tires designed for high-horsepower tractors and advanced harvesting equipment, focusing on improving soil protection and fuel efficiency during heavy field operations . Apollo's Vredestein Traxion CropCare series grants 30% higher lateral stability for sprayers, reflecting an engineering push tailored to crop-protection equipment .

Latest Industry News and Developments

Recent industry developments highlight the dynamic nature of the agricultural tires market. In May 2025, Michelin Group launched a new generation of IF/VF agricultural radial tires designed for high-horsepower tractors and advanced harvesting equipment . The product introduction focused on improving soil protection and fuel efficiency during heavy field operations, targeting large commercial farms in North America and Europe where demand for low-compaction tires continues to rise.

In August 2024, Yokohama Off-Highway Tires completed the acquisition of a regional agricultural tire distributor in Latin America to strengthen its aftermarket presence and distribution network in Brazil and Argentina, enhancing service capabilities for large farm fleets . The acquisition supports Yokohama's broader strategy to expand its off-highway tire footprint in high-growth agricultural regions.

In August 2024, Tolins Tyres strengthened its market position by expanding its product portfolio with heavy-duty rear tractor tires, successfully completing its full product range ahead of the 2025 harvest season . The rollout, supported by an extensive dealer network, ensures improved accessibility and offers farmers reliable, high-performance tire solutions.

Market Challenges and Opportunities

The agricultural tires market faces several key challenges that could impact growth trajectories. The volatility in natural rubber and synthetic rubber prices creates significant cost pressure for agricultural tire manufacturers . Fluctuations in farm income across several regions have reduced discretionary spending on premium farm inputs, including tires . The high initial cost of premium radial and VF tires limits adoption among small and marginal farmers in developing economies . Seasonal demand patterns tied to crop cycles create uneven revenue streams for tire producers and distributors . Limited dealer penetration in rural markets of Africa and parts of Asia further restricts market reach for premium agricultural tire products . Environmental concerns related to tire disposal and rubber waste management attract regulatory scrutiny, increasing compliance costs .

Emerging opportunities are abundant in the evolving agricultural landscape. The expansion of large-scale commercial farming in Asia-Pacific, Eastern Europe, and Latin America presents strong growth opportunities . Rising penetration of precision farming equipment creates demand for specialized tires compatible with GPS-guided machinery and variable field conditions . Development of airless and hybrid tire technologies offers new avenues for innovation, particularly in high-durability applications . Untapped replacement markets in Africa and Southeast Asia provide significant long-term potential as farm mechanization accelerates . Growth of agricultural equipment rental and leasing models increases tire utilization intensity, supporting aftermarket demand . Rising emphasis on sustainable agriculture further strengthens opportunities for low-soil-compaction and fuel-efficient tire solutions across advanced farming economies .

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Final Market Summary

The agricultural tires market is positioned for steady growth, driven by farm mechanization, precision agriculture adoption, and replacement demand. The market's trajectory from USD 9.73 billion in 2026 to USD 16.86 billion by 2035 reflects the critical importance of specialized tire solutions in enabling modern, efficient, and sustainable agricultural operations.

The long-term industry potential remains robust, with technological advancements in tire construction, smart tire technologies, and precision farming compatibility continuing to expand the addressable market. The convergence of agricultural tires with broader precision agriculture ecosystems, including GPS-guided machinery, variable-rate application systems, and soil health management, is creating comprehensive solutions that serve diverse farming needs across global regions.

Key factors expected to influence future development include the pace of farm mechanization in emerging economies, technological advancements in IF/VF radial constructions, and the evolution of sustainability regulations. The development of smart tire technologies and low-compaction solutions will enable farmers to achieve productivity goals while preserving soil health. As agriculture continues to modernize and scale, the role of specialized agricultural tires will continue to expand, ensuring sustained growth throughout the forecast period and beyond.

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