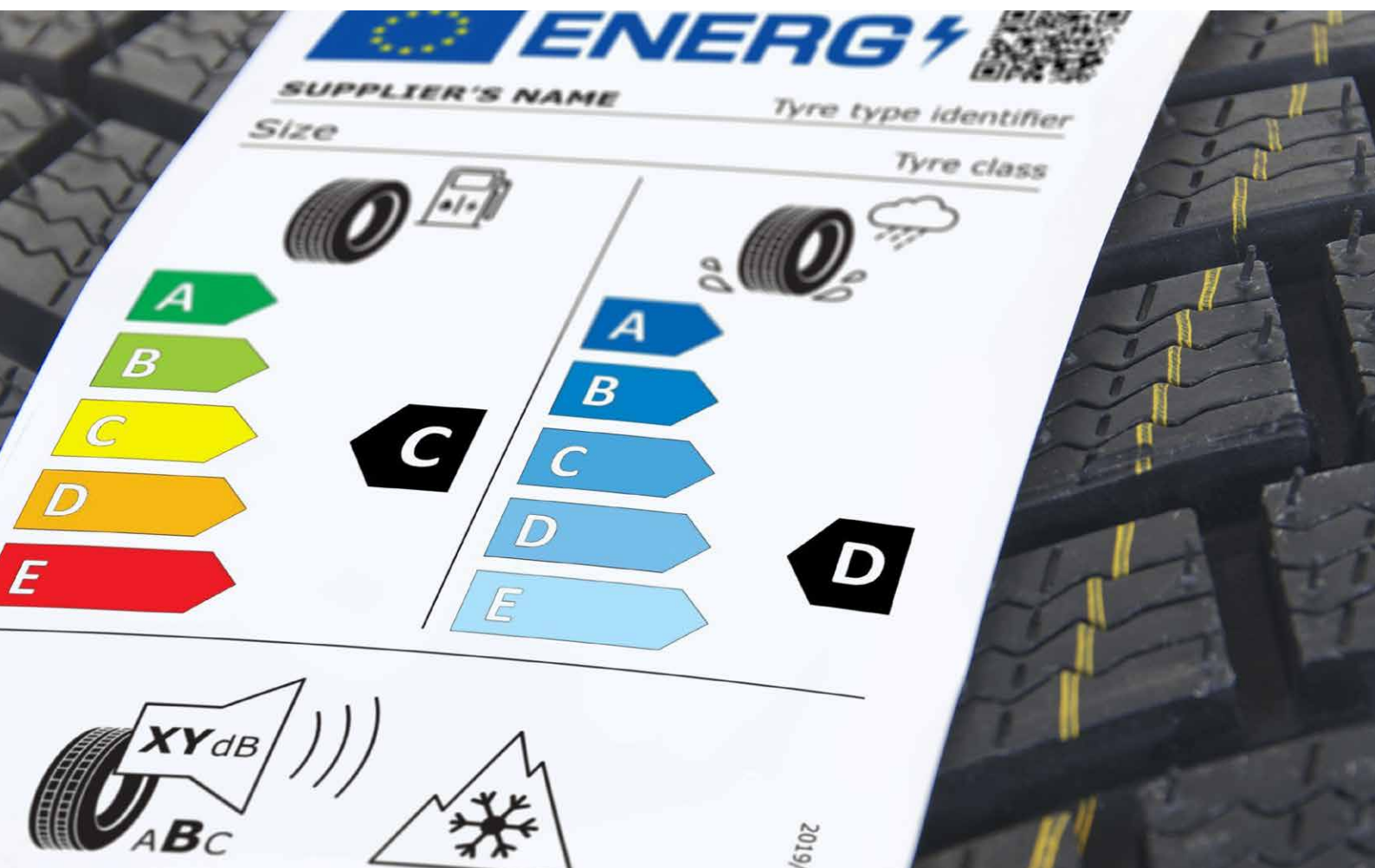




EUROPEAN
TYRE & RUBBER
manufacturers'
association



European Tyre Labelling 2012-2020

Approaching the new Label

February 2021

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This report has been realized with the support of the independent data collection by Lizeo Group.

Results are provided on the basis of aggregated data subject to updating and non-modification

All graphs and data are property of Lizeo On Line Media Group.



Executive Summary

Lizeo Group, an independent Global Information Technology company focused on managing and adding value to Big Data for the Tyre Industry, carried out a first [study](#) in 2018¹ with the objective of taking stock of the evolution of the European tyre market with regards to the performances indicated on the tyre label-first time implemented in November 2012². The study has been updated to include 2020 market data.

The tyre label regulation will be repealed and a new scheme will be implemented from 1 May 2021³.

Lizeo Group has looked at the combination of rolling resistance and wet grip classes and their evolution.

Lizeo Group applied this methodology to hundreds of thousands of labels collected across the 28 EU Member States between 2012-2020 and looked at the evolution of the presence of different label grades combinations on the European market.

The collected labels are classified into passenger car tyres (C1), van tyres (C2) and truck and bus tyres (C3). Within these categories, tyres are divided into Budget, Mid and Premium brands.

This study provides a representative picture of the European market ahead of the introduction of the new tyre label scheme.

Evolution of the European tyre label:

ETRMA has supported the tyre label since its inception in 2009 and fully engaged in its implementation since 2012. The tyre label was originally introduced to support competition and differentiate products based on performance, providing consumers with the opportunity to make informed decisions.

The current European tyre label (until May 1st, 2021) consists of **three performance indicators**:

- Rolling resistance: this performance depends on the ability of the tyre to improve the vehicle's fuel efficiency and lower its CO₂ emissions.
- Wet grip: tyres with a shorter braking distance on wet roads are awarded a better wet grip class. This performance is a safety indicator.
- Noise: noise levels are expressed in decibels, accompanied by one, two or three sound waves, with one black as an indication of the best noise level performance.

¹ Results are provided on the basis of aggregated data subject to updating and non-modification. All graphs and data are property of Lizeo On Line Media Group

² Reg (EU) 1222/2009

³ Reg (EU) 2020/740

Key findings of the analysis

- ▶ In 2012, the most common tyre label for passenger car tyres was **“E” for Rolling Resistance and “C” for Wet Grip**.

In 2020, this label is still the most common constituting around one-fourth of the passenger car tyre products on the market.

- ▶ Between 2012-13 and 2020, the **Budget products segment increased year/year**.
 - For **C1 products**, the Budget segment share increased from 38% in 2012-13, to 62% in 2020; whilst the Premium segment went from 33% in 2012-13 to 24% in 2020;
 - For **C3 products**, in the same period, the Budget segment share went from 10% to 30%; the Premium segment went instead from 65% in 2012-13 to 39% in 2020!
- ▶ **Most efforts on improving fuel efficiency and wet grip performance was carried out by Premium brands in all segments.**
- ▶ **In 2020**, for C1 summer tyres, the AA combination is 2.1% for premium compared to 0% for budget; for the AB, BA and BB classes added, the premium segment represents 17% and only 1.5% in the budget segment.

Conclusions

The findings of the analysis indicate that noticeable improvement happened in the Premium segment.

The labeling tool is confronted with **an evolving market, as** recent years confirmed an increasing number of new brands on the market (+43%). This is a clear indication that, at present, consumers continue choosing their tyres mainly on the basis of price.

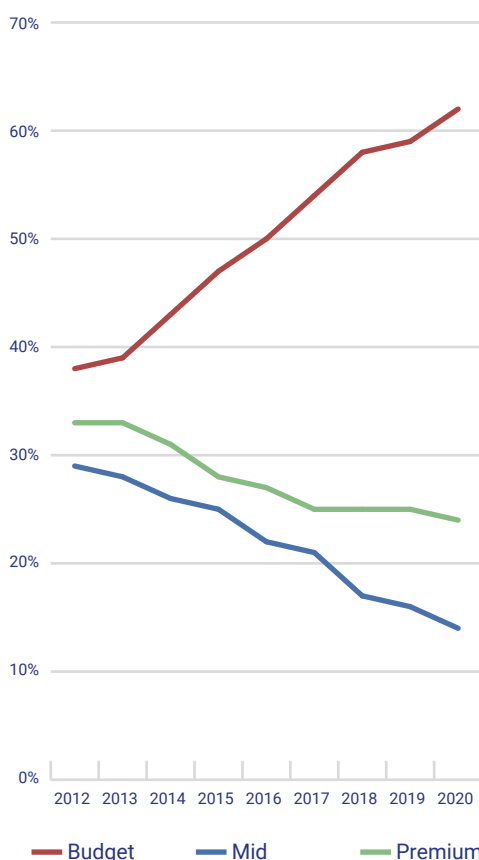
Criteria and set-up of the study

Lizeo Group collected and analysed about 400.000 tyre labels across the 28 EU member states between 2012-13 and 2020. The collected labels are classified into passenger car tyres (C1), van tyres (C2) and truck and bus tyres (C3) and within these categories, tyres were divided into Budget, Mid and Premium brands.

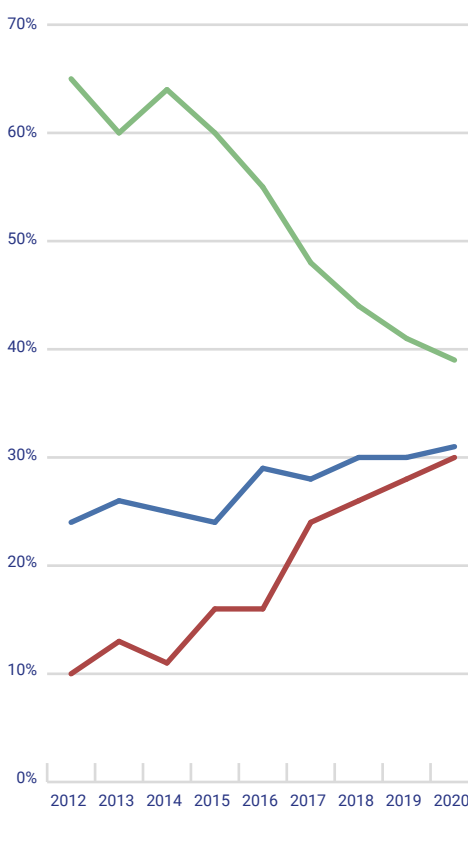
The distribution of brands within one tyre category is as follows:

	2012-13	2013	2014	2015	2016	2017	2018	2019	2020
C1									
Budget	38%	39%	43%	47%	50%	54%	58%	59%	62%
Mid	29%	28%	26%	25%	22%	21%	17%	16%	14%
Premium	33%	33%	31%	28%	27%	25%	25%	25%	24%
C2									
Budget	44%	45%	50%	51%	56%	59%	63%	65%	68%
Mid	32%	30%	28%	27%	25%	24%	22%	19%	17%
Premium	25%	25%	23%	21%	19%	17%	16%	16%	15%
C3									
Budget	10%	13%	11%	16%	16%	24%	26%	28%	30%
Mid	24%	26%	25%	24%	29%	28%	30%	30%	31%
Premium	65%	60%	64%	60%	55%	48%	44%	41%	39%

C1 - Product Evolution



C3 - Product Evolution



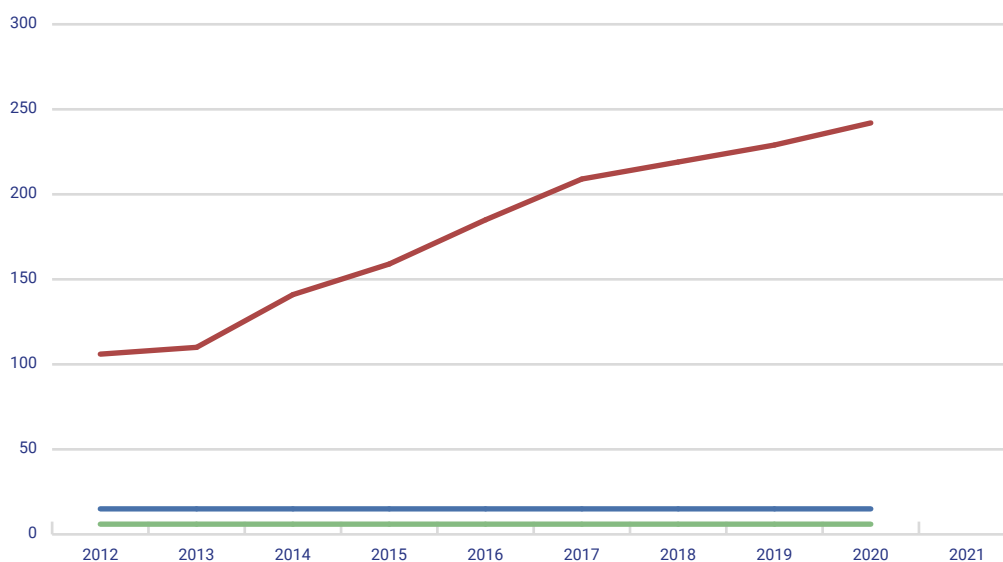
- The data clearly indicates an increase in the Budget segment over the years
- The evolution of Premium products in the C3 segment has decreased from 65% to 39%; on the opposite the Budget segment has tripled

► Brands evolution

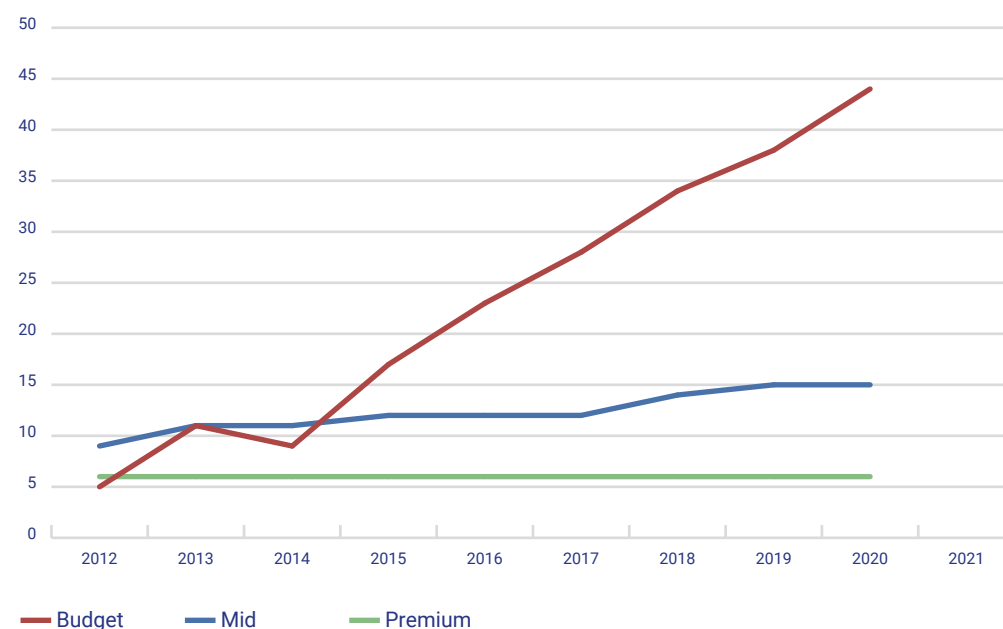
Recent years confirmed an increasing number of new brands on the market (+43%), especially in Budget segment.

This is particularly true for C1-C2 segments. For C3-segment same trend is observed, with however less brands on the market.

C1 - Number of brands



C3 - Number of brands






Analysis

As mentioned above, any analysis must be performed looking at both rolling resistance-RR (fuel consumption) and wet grip WG (for safety), since there is a physical and technological trade-off between these performances.

Passenger Car Tyres ("C1")




► The market in 2012-13

C1	2012	RR 						
	2013	A	B	C	E	F	G	
	A	0.1%	0.4%	2.5%	2.8%	1.0%	0.0%	6.7%
	B	0.0%	0.8%	5.8%	11.3%	4.6%	0.7%	23.1%
	C	0.1%	0.4%	8.8%	23.9%	12.7%	1.5%	47.3%
	E	0.0%	0.2%	2.8%	8.7%	5.6%	0.9%	18.2%
	F	0.0%	0.3%	0.7%	2.0%	1.5%	0.2%	4.7%
		0.2%	2.1%	20.5%	48.6%	25.4%	3.3%	100.0%
		RR 						

(values>5% are highlighted)

The most popular car tyre label in 2012-13 was "E" for rolling resistance and "C" for wet grip.

► The market in 2020

C1	2020	RR 						
		A	B	C	E	F	G	
	A	0.3%	1.3%	4.9%	2.8%	0.4%	0.0%	9.7%
	B	0.6%	1.7%	12.1%	11.2%	1.8%	0.2%	27.5%
	C	0.1%	0.8%	12.7%	25.7%	6.3%	0.5%	45.9%
	E	0.0%	0.4%	2.6%	7.5%	2.7%	0.3%	13.4%
	F	0.0%	0.2%	0.7%	1.4%	1.0%	0.1%	3.5%
		1.0%	4.3%	33.0%	48.5%	12.1%	1.1%	100.0%
		RR 						

(values>5% are highlighted)

More than 50% of C1 products is class E or worse in RR in 2020

A more detailed analysis of the label evolution from 2012-13 to 2020 shows that **the market overall has not evolved** and that **improvement of rolling resistance and wet grip label grading happened for Premium brands**.

► Passenger car tyres - Product distribution

The product distribution in 2020 is showing that products equal to “B-B or better” account for less than 5% of the market.

C1	2012	2013	2014	2015	2016	2017	2018	2019	2020
A-A	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.3%	0.4%	0.6%
A-B	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.3%	0.6%	1.0%
A-C	0.0%	0.2%	0.2%	0.2%	0.2%	0.2%	0.1%	0.1%	0.1%
A-E	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
A-F	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
B-A	0.6%	0.7%	0.7%	0.7%	0.9%	1.3%	1.6%	1.9%	2.1%
B-B	1.0%	1.2%	1.3%	1.5%	1.7%	1.8%	2.1%	2.1%	2.2%
B-C	0.3%	0.4%	0.4%	0.5%	0.6%	0.6%	0.7%	0.8%	0.8%
B-E	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
B-F	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%
C-A	3.4%	4.3%	5.2%	5.5%	6.2%	6.4%	6.5%	7.2%	7.8%
C-B	7.5%	8.5%	8.6%	9.3%	10.6%	11.2%	12.4%	13.7%	15.0%
C-C	7.6%	7.4%	8.2%	9.1%	9.4%	10.6%	11.8%	11.7%	11.8%
C-E	1.5%	1.4%	1.3%	1.3%	1.4%	1.3%	1.3%	1.2%	1.2%
C-F	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
E-A	4.5%	4.6%	5.0%	5.2%	5.2%	4.9%	4.6%	4.6%	4.8%
E-B	16.2%	15.5%	15.6%	14.9%	14.5%	14.9%	14.7%	14.5%	14.3%
E-C	22.2%	23.2%	23.2%	24.4%	24.4%	24.2%	23.1%	22.5%	21.9%
E-E	5.1%	5.0%	5.1%	5.0%	5.0%	4.7%	4.6%	4.6%	4.4%
E-F	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.1%	0.1%
F-A	1.6%	1.5%	1.5%	1.2%	1.1%	1.0%	0.8%	0.7%	0.6%
F-B	7.0%	6.5%	5.8%	5.0%	4.6%	3.9%	3.4%	3.1%	2.7%
F-C	12.0%	11.2%	10.1%	9.4%	8.2%	7.8%	6.9%	6.1%	5.3%
F-E	4.5%	4.2%	3.9%	3.4%	3.0%	2.7%	2.4%	2.2%	1.8%
F-F	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.1%	0.1%	0.1%
G-A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
G-B	0.9%	0.8%	0.7%	0.6%	0.5%	0.4%	0.4%	0.3%	0.3%
G-C	1.9%	1.6%	1.4%	1.2%	1.0%	0.9%	0.8%	0.6%	0.5%
G-E	0.7%	0.6%	0.6%	0.5%	0.4%	0.4%	0.3%	0.2%	0.2%
G-F	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(values > 5% are highlighted)



When looking at the detail of the segments (table5), we observe a market differentiation: Premium brands have preferred to focus on improving rolling resistance and wet grip performance.

Some positive evolution in the higher classes is visible only for products “B-B or better” in the premium segment; **A-A, A-B and B-A classes remaining substantially unpopulated in the budget segment. The majority of the market is dominated by label grades below C-C and the E-C labels remains the most popular for all brands, representing about 30% of the Budget segment and 15% of the Premium segment.**





C1 2012-13	Budget	Mid	Premium	C1 2020	Budget	Mid	Premium
RR-WETG	100%	100%	100%	RR-WETG	100%	100%	100%
A-A	0.0%	0.0%	0.3%	A-A	0.0%	0.3%	2.1%
A-B	0.0%	0.0%	0.2%	A-B	0.0%	0.2%	3.6%
A-C	0.0%	0.2%	0.1%	A-C	0.0%	0.2%	0.3%
A-E	0.0%	0.0%	0.1%	A-E	0.0%	0.0%	0.0%
A-F	0.0%	0.0%	0.0%	A-F	0.0%	0.0%	0.0%
B-A	0.1%	0.2%	1.6%	B-A	0.2%	1.7%	6.7%
B-B	0.5%	0.9%	2.0%	B-B	1.2%	1.8%	4.7%
B-C	0.2%	0.4%	0.5%	B-C	0.7%	0.7%	0.9%
B-E	0.3%	0.1%	0.3%	B-E	0.3%	0.0%	0.2%
B-F	0.1%	0.1%	0.0%	B-F	0.0%	0.1%	0.0%
C-A	0.4%	3.7%	7.7%	C-A	1.9%	18.9%	16.2%
C-B	4.0%	8.8%	11.7%	C-B	17.5%	12.3%	10.4%
C-C	8.3%	9.3%	5.2%	C-C	15.4%	9.4%	4.4%
C-E	1.9%	1.2%	1.1%	C-E	1.5%	0.9%	0.7%
C-F	0.1%	0.0%	0.2%	C-F	0.1%	0.0%	0.1%
E-A	0.4%	5.1%	8.5%	E-A	1.3%	9.1%	11.1%
E-B	11.5%	15.2%	21.0%	E-B	14.3%	12.6%	15.2%
E-C	38.4%	14.2%	12.9%	E-C	30.8%	8.5%	7.9%
E-E	8.2%	4.2%	2.4%	E-E	5.6%	3.4%	2.0%
E-F	0.2%	0.3%	0.4%	E-F	0.1%	0.2%	0.2%
F-A	0.1%	2.4%	2.4%	F-A	0.0%	1.4%	1.6%
F-B	3.1%	9.0%	8.8%	F-B	1.3%	4.7%	4.9%
F-C	14.1%	12.8%	7.9%	F-C	5.6%	6.1%	4.2%
F-E	5.6%	5.6%	2.1%	F-E	1.7%	3.3%	1.2%
F-F	0.4%	0.1%	0.3%	F-F	0.1%	0.2%	0.2%
G-A	0.0%	0.0%	0.1%	G-A	0.0%	0.2%	0.0%
G-B	0.6%	1.3%	0.9%	G-B	0.1%	0.6%	0.5%
G-C	1.0%	3.7%	1.0%	G-C	0.2%	2.2%	0.5%
G-E	0.5%	1.3%	0.3%	G-E	0.1%	0.9%	0.1%
G-F	0.1%	0.0%	0.2%	G-F	0.0%	0.0%	0.1%





(values>2% are highlighted)

There is still a significant difference in speed of evolution between Premium and Budget products, as shown above.

Van Tyres ("C2")

The analysis of 2020 product data shows that the most popular label in this category remains E-C: 33.8% both in 2012/13 average and in 2020. Nonetheless some evolution is visible as the products with a label equal or better than C-C are moving from 19% to 31% in the same period.

C2	2012	RR 							
	2013	A	B	C	E	F	G		
	A	0.2%	0.5%	1.4%	2.2%	1.1%	0.2%	5.6%	
	B	0.0%	1.3%	6.8%	7.4%	6.1%	0.7%	22.3%	
	C	0.1%	0.2%	8.7%	33.8%	8.9%	0.6%	52.3%	
	E	0.0%	0.4%	2.5%	7.9%	7.1%	0.8%	18.6%	
	F	0.0%	0.1%	0.1%	0.5%	0.4%	0.0%	1.1%	
		0.3%	2.5%	19.5%	51.9%	23.6%	2.2%	100.0%	
		RR 							

C2	2020	RR 							
		A	B	C	E	F	G		
	A	0.4%	1.2%	8.2%	2.5%	0.6%	0.1%	12.8%	
	B	0.0%	0.9%	11.0%	11.1%	2.8%	0.2%	26.0%	
	C	0.2%	0.2%	9.0%	33.8%	4.8%	0.1%	48.1%	
	E	0.0%	0.5%	2.8%	6.2%	2.6%	0.4%	12.5%	
	F	0.0%	0.1%	0.2%	0.2%	0.1%	0.0%	0.5%	
		0.6%	2.8%	31.1%	53.8%	10.8%	0.8%	100.0%	
		RR 							

(values>5% are highlighted)

► Van Tyres – Product segments distribution

When analyzing on premium and budget segments, for example on rolling resistance, it can be seen that in 2020 an higher percentage of premium products are labelled C class or better (56%) in comparison to the budget segment (29%). This is even more evident when focusing on summer sub category only, when these percentages are becoming respectively 70% and 31% in 2020.

Budget	2012	2013	2014	2015	2016	2017	2018	2019	2020
A	0%	0%	0%	0%	0%	0%	0%	0%	0%
B	0%	0%	0%	1%	1%	1%	1%	1%	1%
C	10%	10%	11%	13%	17%	21%	23%	25%	27%
E	70%	72%	72%	70%	67%	66%	65%	63%	62%
F	18%	16%	15%	14%	14%	12%	10%	9%	8%
G	2%	2%	2%	1%	1%	1%	1%	1%	1%
Budget segment	44%	45%	50%	51%	56%	59%	63%	65%	68%

evolution over C2 category

Premium	2012	2013	2014	2015	2016	2017	2018	2019	2020
A	1%	1%	1%	1%	1%	1%	2%	2%	2%
B	7%	9%	10%	10%	10%	10%	11%	12%	12%
C	35%	35%	36%	35%	38%	39%	41%	40%	41%
E	40%	38%	39%	41%	39%	38%	36%	37%	35%
F	16%	14%	13%	12%	11%	10%	9%	9%	8%
G	2%	2%	2%	1%	1%	1%	1%	1%	1%
Premium segment	25%	25%	23%	21%	19%	17%	16%	16%	15%

evolution over C2 category











Truck and Bus Tyres ("C3")

In 2012-13, the most popular label in C3 segment was D-C.

The most popular label in 2020 remains the D-C label.

Even if some improvement towards better classes has been introduced, the products available with a label equal or better than C-C have moved from 31% in 2012-13 to 40% in 2020. Nonetheless the improvement is mostly driven by Premium products.

2012		RR 							
C3	2013	A	B	C	D	E	F		
	A	0.1%	0.5%	1.7%	1.1%	0.1%	0.0%	3.5%	
	B	0.1%	2.6%	12.8%	15.4%	3.1%	0.2%	34.2%	
	C	0.0%	1.0%	12.1%	24.0%	18.4%	3.6%	59.1%	
	D	0.0%	0.0%	0.7%	1.2%	0.8%	0.3%	3.0%	
	E	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	
		0.3%	4.1%	27.3%	41.6%	22.4%	4.3%	100.0%	
		RR 							
2020		RR 							
C3	2020	A	B	C	D	E	F		
	A	0.1%	0.9%	1.4%	1.9%	0.2%	0.1%	4.4%	
	B	0.7%	4.5%	19.8%	16.6%	3.9%	0.5%	46.1%	
	C	0.4%	1.9%	10.8%	21.8%	10.8%	1.1%	46.8%	
	D	0.0%	0.1%	0.7%	0.7%	0.7%	0.2%	2.4%	
	E	0.0%	0.0%	0.1%	0.2%	0.0%	0.1%	0.3%	
		1.2%	7.3%	32.8%	41.2%	15.6%	2.0%	100.0%	
		RR 							

(values>5% are highlighted)

The table below shows the evolution of RR classes in the segments Premium vs Budget:

Budget	2012	2013	2014	2015	2016	2017	2018	2019	2020
A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
B	0.0%	0.0%	0.0%	1.3%	1.3%	2.0%	2.4%	3.3%	3.6%
C	23.0%	25.4%	22.2%	26.6%	25.8%	26.6%	29.2%	28.6%	27.1%
D	47.5%	43.0%	43.7%	39.9%	46.3%	46.6%	43.9%	45.0%	47.3%
E	27.9%	30.7%	33.3%	30.9%	24.8%	23.4%	23.3%	21.5%	20.5%
F	1.6%	0.9%	0.8%	1.3%	1.7%	1.4%	1.3%	1.6%	1.5%
Budget share over year total	10.3%	13.4%	11.2%	15.9%	15.8%	23.8%	25.5%	28.2%	29.9%

evolution over C3 category

Premium	2012	2013	2014	2015	2016	2017	2018	2019	2020
A	0.0%	0.8%	1.3%	1.6%	1.5%	1.4%	1.8%	2.3%	2.8%
B	6.0%	5.3%	6.4%	7.6%	9.0%	8.3%	9.1%	9.9%	11.2%
C	30.3%	28.0%	29.1%	30.0%	31.5%	31.1%	30.6%	33.0%	34.7%
D	37.8%	39.1%	38.0%	37.3%	38.2%	39.6%	39.8%	38.2%	36.2%
E	21.2%	21.6%	20.5%	19.1%	16.6%	16.3%	15.5%	14.0%	12.9%
F	4.7%	5.3%	4.7%	4.4%	3.3%	3.3%	3.1%	2.6%	2.3%
Premium share over year total	65.3%	60.3%	63.8%	60.3%	55.1%	48.1%	44.2%	41.4%	39.1%

evolution over C3 category



Conclusions

The state of evolution of the market according to the study by Lizeo Group leads to the following main conclusions:

- **Major technology improvements** for premium products;
- In 2020, in C1 category, the AA combination is 2.1% for premium compared to 0% for budget;
- The **label as a stand alone regulatory tool** has not lead to a transformation of the market towards better performing products;
- **Market fragmentation and success of budget brands:** significant increase of Budget brands (+228%) as well as of sales of budget tyres in all segments, with a consequent drop of sales for premium products.

These conclusions are supported by the following key data:

- ▶ In 2012-13, the most common tyre label for passenger car tyres was **“E” for Rolling Resistance** and **“C” for Wet Grip**.

In 2020, this label was still the most common constituting around one-fourth of the passenger car tyre products on the market.

- ▶ Between 2012-13 and 2020, the **budget products share of the market tripled, whilst the premium segment dropped**.
 - For **C1 products**, the budget segment share increased from 38% in 2012-13, to 62% in 2020; whilst the premium segment went from 33% in 2012-13 to 24% in 2020;
 - For **C3 products**, in the same period, the budget segment share went from 10% to 30% ; the premium segment went instead from 65% in 2012-13 to 39% in 2020.
- ▶ **Most efforts on improving fuel efficiency and wet grip performance has been carried out by premium brands in all segments.**

Approaching the new EU Tyre Label

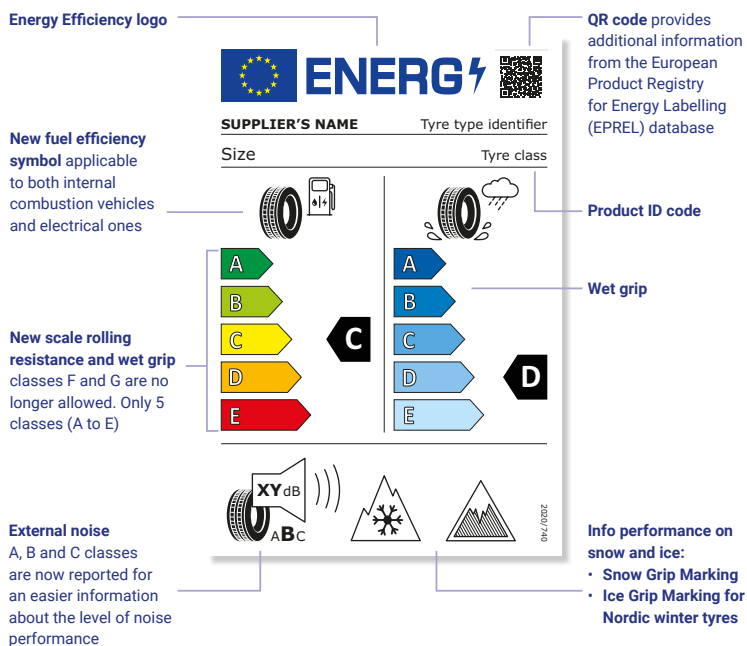
1st May 2021

The EU has committed to cutting its greenhouse gas emissions to reach climate neutrality by 2050. Reducing CO₂ emissions from road transport plays a major part in fulfilling these goals.

Choosing more fuel-efficient tyres can contribute to reducing transport emissions. In order to help consumers make informed decisions, the EU is introducing an [update of the labelling scheme for tyres](#), which will come into force on May 1, 2021.

The EU tyre label will allow EU consumers to choose more fuel-efficient tyres, which can lead to great savings for both end users and commercial users in terms of both costs and emissions. Road safety is improved through better wet grip while information on noise levels help reduce traffic-related noise pollution.

What is new on the EU Tyre Label after May 1, 2021?



The new label includes the same three classification as before. However, the classes in wet grip and fuel efficiency are renewed to be similar to those of other household appliances. The empty classes are removed, and the scale is from A to E. In addition, there is a new way of marking noise class with letters from A to C, but the decibel level remains as earlier.

On the top of existing criteria, the new label introduces Snow Grip Marking as well as Ice Grip Marking. A tyre that is approved for severe snow conditions has the Snow Grip Marking, and a tyre that passes the international ice grip test method shows the Ice Grip Marking on their label.

The new label includes a QR code that can be scanned to see more information about the tyre in the European Product Registry for Energy Labelling (EPREL). The tyre label is also available for download and print out in EPREL.

Via the QR code displayed on the new EU tyre label, consumers will be able to access the corresponding tyre information and download the relevant information.

For more information:

Please visit [ETRMA website](#)

Additional information is available in the [FAQ](#) of the European Commission



**EUROPEAN
TYRE & RUBBER
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