



ETRMA Quarterly Update

In this update:

1. Replacement Tyre Market Review
2. EU27+UK Tyre Imports
3. Mobility & Freight Trends
4. Electric Vehicles in Europe

Quarterly Replacement Tyre Market Review Q2 2025








Consumer market turns negative in the first half as volumes decline in Q2

The European Tyre and Rubber Manufacturers' Association (ETRMA) published its members' replacement tyre sales figures for the second quarter, and the first half of 2025.

Adam McCarthy, ETRMA's Secretary General, said, "The second-quarter developments confirm the challenging economic and geopolitical environment, which continues to undermine market confidence and investments. Only the Motorcycle & Scooter segment benefited from a decline in non-pool volumes.

The trends in the second quarter are reflected in the results of the first half. In the Consumer segment, a 4% decline in the second quarter resulted in slightly negative volumes in the first half. For both the Truck and Agricultural tyre segments, the second quarter essentially tracked the trend in the first three months.

As a result, except in Moto & Scooter, volumes are below those achieved in the first half of 2019 (before the Covid crisis): Consumer -2.8%, Truck -14.3% and Agricultural tyres -47%."

	000s Units	Q1		Q2		H1	
		Change	2024 Q2	2025 Q2	Change	2024 H1	2025 H1
 	Consumer	3%	53.625	51.609	-4%	110.902	110.336
	~ Car Summer	-3%			-9%		
	~ Car All Seasons	14%			-5%		
	~ Car Winter	5%			9%		
 	Truck & Bus	-4%	2.579	2.452	-5%	5.377	5.148
	Agricultural	-5%	190	180	-5%	402	382
	Moto & Scooter	7%	2.747	2.803	2%	6.027	6.323

Discrepancies with data previously published could happen because of periodic data corrections

Consumer = Passenger car, SUVs and light commercial vehicles

Source: EUROPOOL ETRMA

About ETRMA

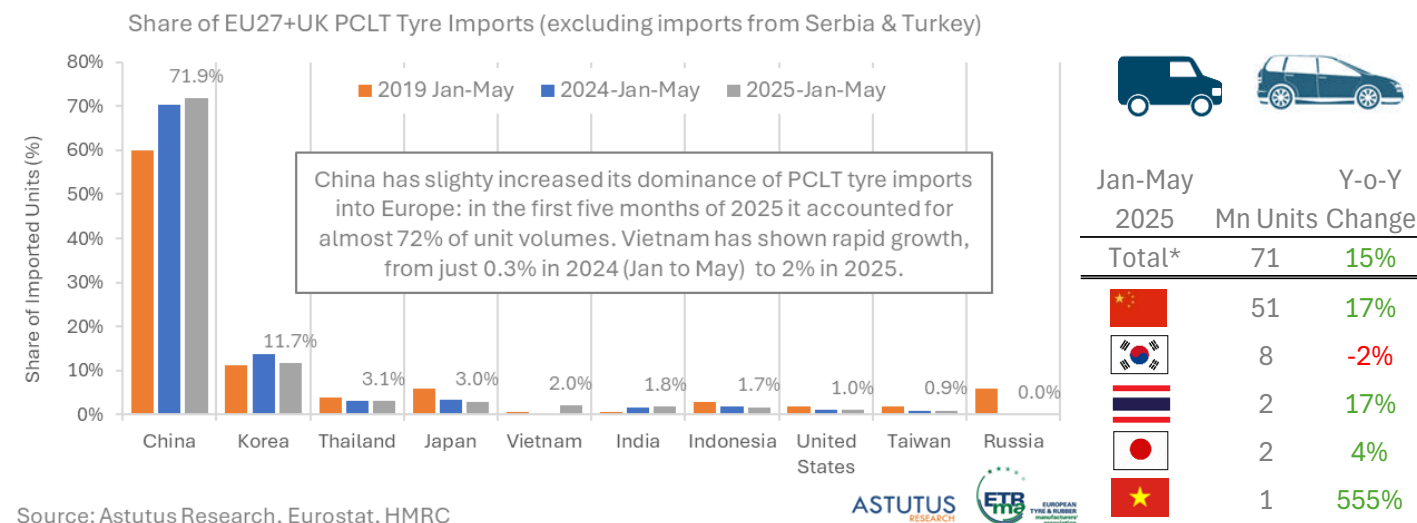
The European Tyre & Rubber Manufacturers Association (ETRMA) represents 14 corporate members whose global sales account for 70% of the worldwide tyre market, including 8 of the top 10 industry leaders. Collectively, these manufacturers maintain a robust presence in the European Union (EU) and candidate countries, operating over 80 production facilities and more than 20 R&D centres. In total, the tyre sector supports nearly 500,000 jobs across the EU.

For further information, please contact communication@etrma.org

EU27+UK Tyre Imports

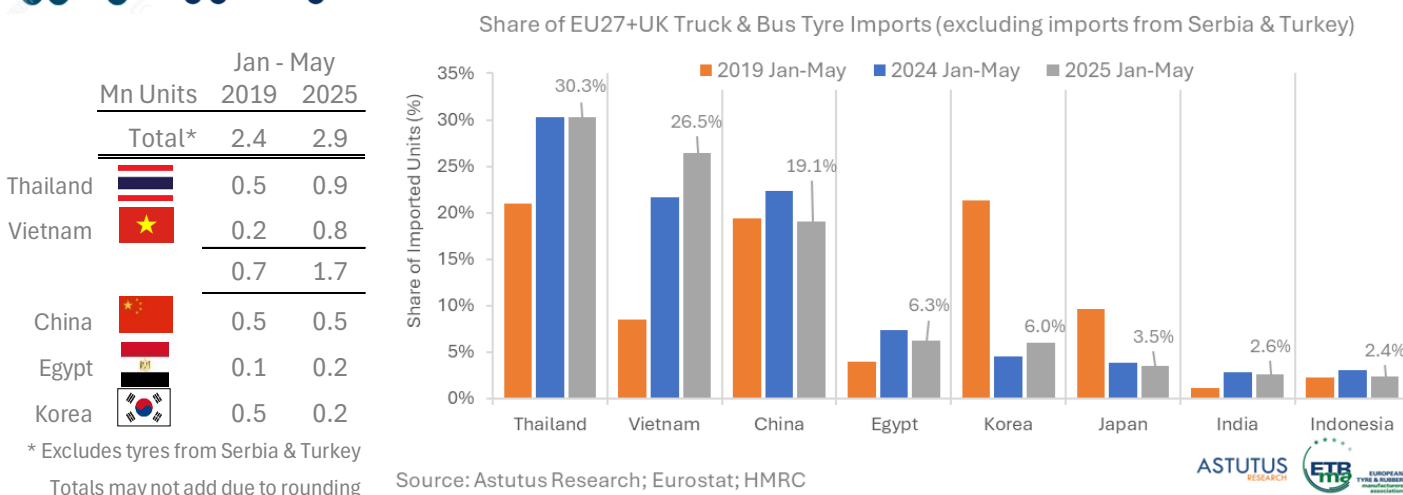
* Data excludes imports from Serbia and Turkey. See note 1 in references, page 4 for more information

PCLT tyre imports increased by a further 15% in the first five months of 2025



Imports of passenger car and light truck (PCLT) tyres into Europe (EU27 plus UK) continue to increase: in the first five months of 2025, volumes are up 15% compared with the same period in 2024. China and Thailand have both seen strong growth, with a 17% year on year increase in units in the period. Vietnam has rapidly moved up the ranking of leading importers, now in fifth place ahead of India and Indonesia. Whilst volumes are still relatively low, at 1.4 million units in the five months, this represents a more than 6-fold increase from just 0.2 million tyres in the same period of 2024 and already double the 0.7 million in the whole of 2024.

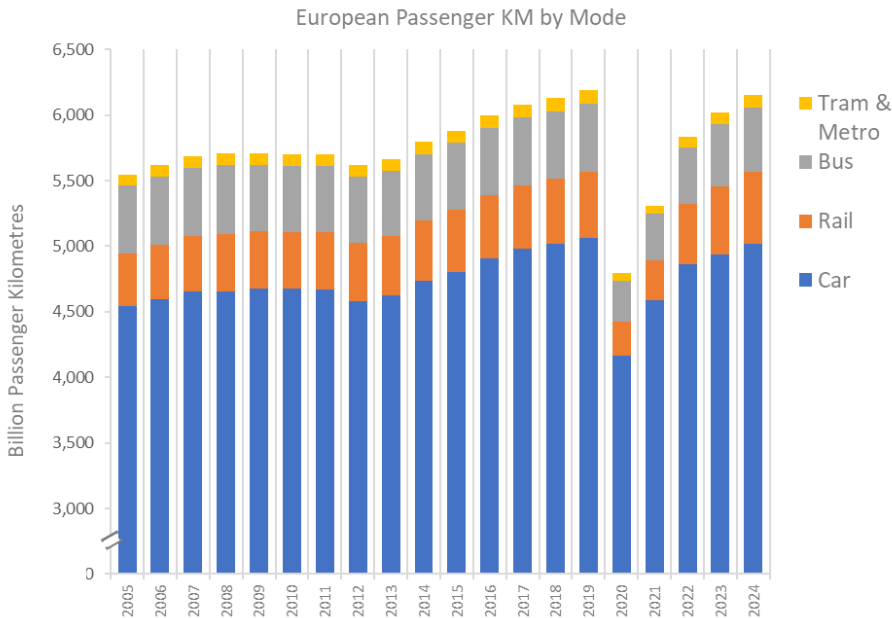
Truck & Bus tyre imports from Vietnam continue to advance in 2025



Truck and bus tyre imports (EU27+UK) from outside Europe rose by almost 15% in the first five months of 2025. Imports from Thailand increased in line with the total and they remained the leading source. Truck and bus tyres from Vietnam grew at more than twice that pace, and the country accounted for more than a quarter of imports, up from around one fifth in the same period of 2024. China fell into third place amongst importers, down from second in the first five months of 2024. Korea increased its share slightly, but it remains significantly below that achieved in 2019.

Mobility and Freight Trends

Changing mobility patterns see slower recovery in commuting, but growth in rail



Source: Astutus Research, Eurostat, National Sources, Companies



By the end of 2024 aggregate passenger mobility in Europe was approaching 2019 levels, but not yet on a par with pre-pandemic patterns. Modes that are more reliant on commuter traffic (bus, tram & metro) have seen the slowest recovery. Rail travel, by contrast, has already exceeded its former highs despite disruption in some markets associated with strike action, bad weather at the start of 2024 and interruption to services caused by work on infrastructure aimed at expanding capacity.

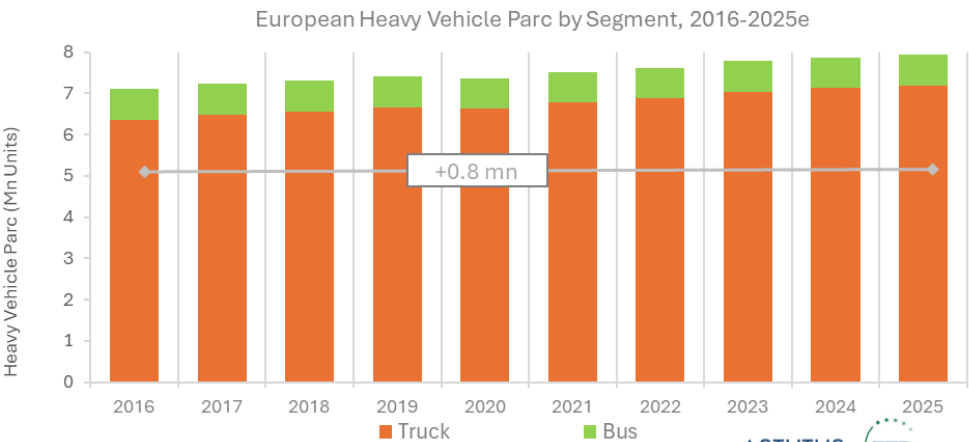
See note 2 in references on page 4

Heavy commercial vehicle parc continues to grow, but at a low pace

Bus & Coach



Truck



Source: Astutus Research Vehicle Database



Europe’s bus & coach parc declined during the pandemic, with vehicles taken off the road due to the very sharp decline in the number of travellers. Whilst passenger volumes have recovered somewhat, declines in commuting mean they remain below the pre-pandemic levels. New bus registrations rose in both 2023 and 2024, reflecting investment to modernise fleets and encourage a switch from car-based travel.

For the truck parc, the slow transition to heavier vehicles with a greater average capacity, and more efficient usage (better route planning, less empty runs) will continue to limit the increase in vehicle numbers. There has, however, been a shift towards carriers based in Central Europe ‘exporting’ their services across the region, resulting in a sharp eastward-shift in growth in the truck parc.

See note 3 in references, page 4

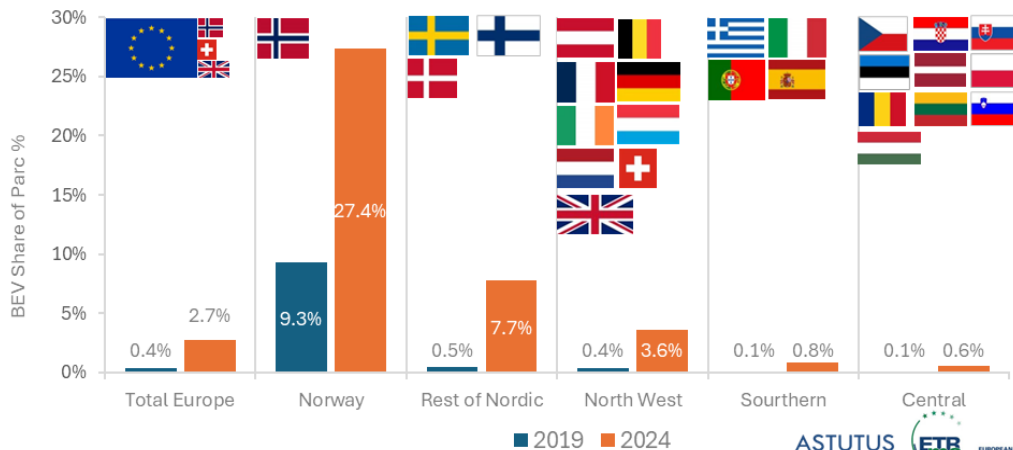
Electric Vehicles in Europe

Southern and Central European markets significantly lag the other regions

Battery Electric Vehicles Share of Car Parc (excludes PHEV)



**Europe Pure BEV
Car Parc**
2019 – 1.00mn
2024 – 8.11mn



Source: Astutus Research Light Vehicle Database

ASTUTUS
RESEARCH



According to Astutus Research, at the end of 2024 the parc of 100% battery electric cars in Europe was more than eight times larger than it was in 2019, exceeding 8 million vehicles. As a share of total car parc this represented 2.7%, up from 2.2% at the end of the previous year. There are very significant national and regional variations in penetration rates.

In Norway, BEVs now represent more than one quarter of the car parc, at over 27%. In the rest of the Nordic region the share has reached 7.7%; within this group, Denmark is the only other country in Europe where penetration has entered double figures, reaching 12%. The share now stands at 3.6% in the North West of Europe (although it is higher in the Netherlands and Belgium).

In the other regions, penetration has yet to reach 1%. In the Southern markets it is now 0.8%, albeit with a stronger showing in Portugal. In Central Europe, BEV cars represent just 0.6% of the parc. Used car imports represent a larger share of first registrations in these markets and the share of BEVs in these imports remains low.

See note 4 below

References

- 1) Imports relate to total volume (units) imported by the EU27 plus the UK from outside 'greater Europe'. For this analysis imports from Serbia and Turkey are therefore excluded.
PCLT = Sum of HS Codes 40111000 & 40112010; Truck & Bus – HS Code 40112090
- 2) Data for passenger kilometres relates to the EU27, plus UK, Switzerland, Norway but excludes Bulgaria, Cyprus and Malta.
- 3) Data relates to busses and trucks with a GVW exceeding 3.5 tonnes. Country coverage is the EU27, plus UK, Switzerland, Norway but excludes Bulgaria, Cyprus and Malta.
- 4) Data refers to cars and SUVs, but excludes light commercial vehicles. Data covers the European Union (excludes Bulgaria, Cyprus and Malta) plus the UK, Switzerland & Norway. Includes 100% electric vehicles only and excludes hybrids and plug-in hybrids.

About Astutus Research

This Quarterly Update has been prepared for ETRMA by Astutus Research, an independent provider of market intelligence focused on the tyre industry, mobility (tyre use) and tyre recovery & recycling.

For further information please contact info@astutusresearch.com or visit www.astutusresearch.com