

Global Retreaded Tyre Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 11.4 bn
Forecast (2031)	USD 15.8 bn
CAGR (2021-2031)	5.7%
Study period	2021-2031
Largest region	Asia-Pacific · 36.4%
Fastest-growing region	Latin America · 6.9%
Market concentration	Moderate
Licence	Individual / Company

The global retreaded tyre market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Commercial truck and bus tyres generate XX% of market value as fleet operators use casing reuse to lower cost per kilometre, improve asset utilisation and meet circular-procurement targets. Asia-Pacific leads with a XX% share, while Latin America is the fastest-growing region at a XX% CAGR. Automated casing inspection, low-rolling-resistance compounds and digitally managed tyre programmes are moving retreading from a replacement purchase toward a lifecycle fleet service.

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Table of contents

1 Introduction

1.1 Study Scope and Market Definition

1.2 Currency, Units and Study Period

1.3 Inclusions and Exclusions

2 Research Methodology

2.1 Secondary Research Programme

2.2 Primary Interview Programme

2.3 Market Sizing and Triangulation

2.4 Forecast Model and Scenario Design

3 Executive Summary

3.1 Market Size and Growth Outlook

3.2 Segment and Regional Highlights

3.3 Competitive and Investment Takeaways

4 Retreaded Tyre Market Dynamics

4.1 Market Drivers

4.1.1 Fleet Cost-per-Kilometre Advantage

4.1.2 Circular Procurement and Decarbonisation

4.1.3 Automation and Digital Casing Management

4.2 Market Restraints

4.2.1 Low-Cost New-Tyre Competition

4.2.2 Casing Availability and Quality

4.3 Porter's Five Forces Analysis

4.4 Regulatory and Standards Landscape

5 Global Market Size and Forecast, 2021-2031

5.1 Historical Market Value and Volume

5.2 Base-Case Forecast

5.3 Upside and Downside Scenarios

6 Market by Retreading Process

6.1 Pre-cure Retreading

6.2 Mould-cure Retreading

7 Market by Vehicle and Equipment Application

7.1 Commercial Truck and Bus

7.2 Off-the-Road and Mining Equipment

7.3 Aircraft

7.4 Passenger and Light Vehicles

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7.5 Agricultural and Industrial Vehicles

8 Market by Channel and Commercial Duty Cycle

8.1 Manufacturer-Backed and Franchise Networks

8.2 Independent Retreaders

8.3 Long-Haul and Regional Freight

8.4 Urban Bus, Delivery and Vocational Fleets

9 North America Retreaded Tyre Market

9.1 United States

9.2 Canada

9.3 Rest of North America

10 Europe Retreaded Tyre Market

10.1 Germany

10.2 United Kingdom

10.3 France

10.4 Italy

10.5 Spain

10.6 Rest of Europe

11 Asia-Pacific Retreaded Tyre Market

11.1 China

11.2 India

11.3 Japan

11.4 South Korea

11.5 Australia

11.6 Thailand

11.7 Indonesia

11.8 Rest of Asia-Pacific

12 Latin America Retreaded Tyre Market

12.1 Brazil

12.2 Mexico

12.3 Argentina

12.4 Rest of Latin America

13 Middle East and Africa Retreaded Tyre Market

13.1 Saudi Arabia

13.2 United Arab Emirates

13.3 South Africa

13.4 Rest of Middle East and Africa

14 Competitive Landscape

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14.1 Market Share and Strategic Positioning
14.2 Bridgestone Corporation
14.3 Compagnie Générale des Établissements Michelin
14.4 The Goodyear Tire & Rubber Company
14.5 Continental AG
14.6 Marangoni S.p.A.
14.7 Vipal Rubber Corporation
14.8 Kal Tire
14.9 Elgi Rubber Company Limited
14.10 Indag Rubber Limited
14.11 Vaculug Limited
15 Market Opportunities and Strategic Outlook
15.1 High-Growth Applications and Regions
15.2 Technology and Service Roadmap
15.3 Recommendations for Market Participants

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List of tables

Table 1. Global Retreaded Tyre Market Snapshot, 2021-2031

Table 2. Leading and Fastest-Growing Segments

Table 3. Executive Opportunity and Risk Matrix

Table 4. Market Scope, Definitions and Exclusions

Table 5. Primary and Secondary Research Framework

Table 6. Retreaded Tyre Market Driver Impact Assessment

Table 7. Retreaded Tyre Market Restraint Impact Assessment

Table 8. Porter's Five Forces Analysis

Table 9. Global Market Value by Year, 2021-2031

Table 10. Global Market Volume by Year, 2021-2031

Table 11. Average Selling Value by Application, 2021-2031

Table 12. Forecast Scenario Assumptions and Outcomes

Table 13. Market Value by Retreading Process, 2021-2031

Table 14. Market Volume by Retreading Process, 2021-2031

Table 15. Pre-cure versus Mould-cure Operating Characteristics

Table 16. Market Value by Vehicle and Equipment Application, 2021-2031

Table 17. Market Volume by Vehicle and Equipment Application, 2021-2031

Table 18. Commercial Truck and Bus Retread Demand by Axle Position

Table 19. OTR and Aircraft Retread Pricing and Service-Life Benchmarks

Table 20. Market Value by Sales and Service Channel, 2021-2031

Table 21. Market Volume by Sales and Service Channel, 2021-2031

Table 22. Market Value by Commercial Duty Cycle, 2021-2031

Table 23. Fleet Procurement Criteria by Duty Cycle

Table 24. North America Market by Country, 2021-2031

Table 25. Europe Market by Country, 2021-2031

Table 26. Asia-Pacific Market by Country, 2021-2031

Table 27. Latin America Market by Country, 2021-2031

Table 28. Middle East and Africa Market by Country, 2021-2031

Table 29. Regional Regulation, Fleet Structure and Casing-Supply Comparison

Table 30. Bridgestone Corporation Company Profile

Table 31. Compagnie Générale des Établissements Michelin Company Profile

Table 32. The Goodyear Tire & Rubber Company Profile

Table 33. Continental AG Company Profile

Table 34. Marangoni S.p.A. Company Profile

Table 35. Vipal Rubber Corporation Company Profile

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Table 36. Kal Tire Company Profile

Table 37. Elgi Rubber Company Limited Company Profile

Table 38. Indag Rubber Limited Company Profile

Table 39. Vaculug Limited Company Profile

Table 40. Opportunity Ranking by Revenue Potential and Execution Risk

Table 41. Technology Roadmap for Retread Plants, 2026-2031

Table 42. Strategic Actions for Manufacturers, Retreaders and Fleet Operators

Table 43. Market value by year, USD bn

Table 44. Year-over-year value change

Table 45. Drivers — impact on forecast

Table 46. Restraints — impact on forecast

Table 47. Value by retreading Process, USD bn

Table 48. Value by vehicle and Equipment Application, USD bn

Table 49. Value by sales and Service Channel, USD bn

Table 50. Value by commercial Duty Cycle, USD bn

Table 51. Market value by region, USD bn

Table 52. Market value by leading country, USD bn

Table 53. Leading companies

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List of figures

Figure 1. Global Retreaded Tyre Market Value, 2021-2031

Figure 2. 2025 Market Share by Region

Figure 3. Primary Interview Distribution by Respondent Group

Figure 4. Driver Impact on Forecast CAGR

Figure 5. Restraint Impact on Forecast CAGR

Figure 6. Market Revenue and Year-on-Year Growth, 2021-2031

Figure 7. Global Retreaded Tyre Unit Demand, 2021-2031

Figure 8. Base, Upside and Downside Revenue Scenarios to 2031

Figure 9. 2025 Retreaded Tyre Market Share by Process

Figure 10. Process Revenue Growth, 2021-2031

Figure 11. 2025 Market Share by Vehicle and Equipment Application

Figure 12. Application CAGR Comparison, 2025-2031

Figure 13. 2025 Market Share by Sales and Service Channel

Figure 14. Commercial Duty-Cycle Growth Comparison, 2025-2031

Figure 15. Regional Market Value, 2021-2031

Figure 16. 2025 Regional Market Share

Figure 17. Regional CAGR Comparison, 2025-2031

Figure 18. 2025 Global Retreaded Tyre Company Share

Figure 19. Competitive Positioning by Network Reach and Technology Depth

Figure 20. Opportunity Attractiveness by Application and Region

Figure 21. Value share by retreading Process, 2025

Figure 22. Value share by vehicle and Equipment Application, 2025

Figure 23. Growth rate by region, 2025-2031

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Executive summary

The global retreaded tyre market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Commercial truck and bus tyres generate XX% of market value as fleet operators use casing reuse to lower cost per kilometre, improve asset utilisation and meet circular-procurement targets. Asia-Pacific leads with a XX% share, while Latin America is the fastest-growing region at a XX% CAGR. Automated casing inspection, low-rolling-resistance compounds and digitally managed tyre programmes are moving retreading from a replacement purchase toward a lifecycle fleet service.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global market value reached USD XXX billion in 2025 and will rise to USD XXX billion by 2031.
- Commercial truck and bus applications accounted for XX% of 2025 market value.
- Pre-cure retreading held a XX% share in 2025 because distributed plants can serve multiple casing brands and duty cycles with lower tooling intensity.
- Asia-Pacific generated XX% of global revenue in 2025, supported by large truck fleets, price-sensitive replacement demand and expanding organised retreader networks.
- Approximately XXX tyres are retreaded annually in the United States, according to the U.S. Tire Manufacturers Association.
- Retreads represent nearly XX% of commercial truck tyres in the United States and Canada, according to the U.S. Tire Manufacturers Association.
- Nearly XX% of U.S. fleets operating more than 100 trucks use retreaded tyres, according to the U.S. Tire Manufacturers Association's 2024 industry review.
- Michelin reports that each REMIX retread saves 50 kg of raw materials and as much as 115 kg of CO2 compared with an equivalent new tyre.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Retreaded Tyre Market Trends and Growth Drivers

Retreading economics begin with the casing rather than the tread. A durable commercial casing carries embedded materials, engineering and acquisition cost across several service lives, so fleets that manage inflation, alignment and removal timing can convert casing preservation directly into lower operating expenditure. This relationship explains why adoption is highest among large, professionally maintained truck, bus, aviation and mining fleets.

Demand is increasingly shaped by service integration. Fleets want inspection, casing collection, inventory control, pressure monitoring, roadside support and performance reporting alongside the physical retread. The resulting shift toward lifecycle contracts favours networks with dense logistics, audited plants and data systems capable of tracking each casing from first fitment to final recovery.

Supply quality remains the limiting variable. Low-cost tyres that cannot support repeated use, damage caused by underinflation and late tread-removal decisions all reduce usable-casing yield. The industry's investment case therefore centres on better new-tyre design, earlier condition detection and closed-loop ownership models that keep high-value casings within controlled fleets.

Growth drivers

Fleet cost-per-kilometre advantage

Retreading preserves the highest-value component of a tyre—the casing—and replaces the worn tread at a substantially lower lifecycle cost than repeated new-tyre purchases. The advantage is strongest for high-mileage truck, bus, waste and delivery fleets that can control inflation, pull points and casing returns across large vehicle populations.

Road freight and last-mile fleet growth

Growth in regional distribution, parcel delivery and heavy road freight increases annual tread consumption and the pool of casings available for reuse. High-scrub urban operations also shorten tread replacement intervals, strengthening demand for application-specific retreads.

Circular procurement and decarbonisation

Fleet owners and public authorities are incorporating waste prevention, resource efficiency and product carbon data into tender requirements. Retreading converts those objectives into auditable material and emissions reductions without requiring fleets to replace vehicles or supporting infrastructure.

Automated casing inspection

Shearography, electrical inspection, machine vision and AI-assisted classification identify separations and anomalies earlier and more consistently. Higher inspection confidence improves usable-casing yield, reduces avoidable processing and supports standardised quality across multi-plant networks.

Retreadable radial tyre penetration

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The transition from bias-ply to premium radial commercial tyres creates stronger, higher-value casings capable of supporting multiple tread lives. The effect is most pronounced in emerging freight markets where fleet professionalisation is occurring alongside radialisation.

Integrated tyre lifecycle services

Mileage contracts, casing banks, digital pressure monitoring and collection logistics reduce the operational effort required from fleet customers. These programmes also allow suppliers to capture recurring service revenue and protect casings before damage makes them unsuitable for retreading.

Restraints

Low-cost single-life tyre imports

Aggressively priced new tyres narrow the upfront purchase gap and can divert small fleets from retread programmes. Casings from products not engineered for multiple lives also reduce future retread yield and weaken the circular supply base.

Casing scarcity and variable quality

Underinflation, overloading, late pull points and severe operating conditions damage belts and sidewalls before casings reach a retreader. Competition for premium casings raises acquisition cost and constrains throughput in markets without disciplined return systems.

Uneven quality perception

Informal retreading and inconsistent inspection practices continue to affect buyer confidence in several passenger and small-fleet markets. Certified plants must invest in traceability, testing and fleet education to distinguish controlled retreading from low-quality remanufacturing.

Plant investment and skills bottlenecks

Modern non-destructive inspection, buffing, building and curing systems require capital, trained operators and disciplined maintenance. Smaller independent plants face pressure from compliance costs and from the purchasing scale of manufacturer-backed networks.

Vehicle and axle restrictions

Rules restricting retreads on specified steering axles and operational policies adopted by safety-sensitive fleets limit the addressable fitment base. The effect is concentrated in passenger transport and other applications where tyre-position policies are conservative.

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Driver and Restraint Impact on the Retreaded Tyre Market Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Fleet cost-per-kilometre advantage	XXX	XXX	XXX
Road freight and last-mile fleet growth	XXX	XXX	XXX
Circular procurement and decarbonisation	XXX	XXX	XXX
Automated casing inspection	XXX	XXX	XXX
Retreadable radial tyre penetration	XXX	XXX	XXX
Integrated tyre lifecycle services	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Low-cost single-life tyre imports	XXX	XXX	XXX
Casing scarcity and variable quality	XXX	XXX	XXX
Uneven quality perception	XXX	XXX	XXX
Plant investment and skills bottlenecks	XXX	XXX	XXX
Vehicle and axle restrictions	XXX	XXX	XXX

Source: XXX

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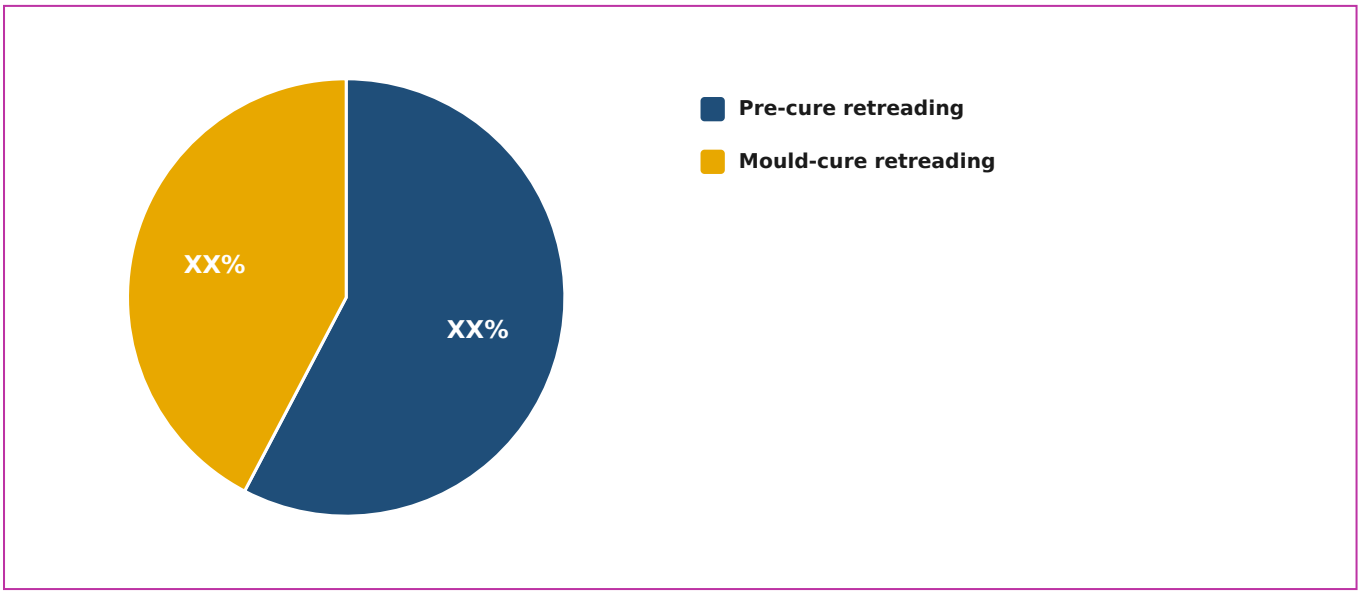
Retreaded Tyre Market Segmentation by Process, Application and Channel

By Retreading Process

Pre-cure systems dominate because a single plant can combine standardised tread strips or rings with multiple casing brands, sizes and duty cycles without maintaining a large mould inventory. The process supports decentralised franchise networks and efficient small-batch production. Mould-cure retreading remains important in premium hot-retread programmes, passenger applications and nominative systems designed to reproduce new-tyre tread geometry.

Value share by retreading Process, 2025



Source: XXX

Value by retreading Process, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Pre-cure retreading	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mould-cure retreading	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Vehicle and Equipment Application

Truck and bus fleets combine high annual mileage, standardised fitments and measurable tyre cost per kilometre, making them the market's anchor application. OTR retreading grows fastest because large mining and construction casings carry high replacement values and reward specialist repair capability. Aircraft retreading remains technically demanding and tightly controlled, while passenger and light-vehicle demand is constrained by inexpensive new tyres and consumer perceptions.

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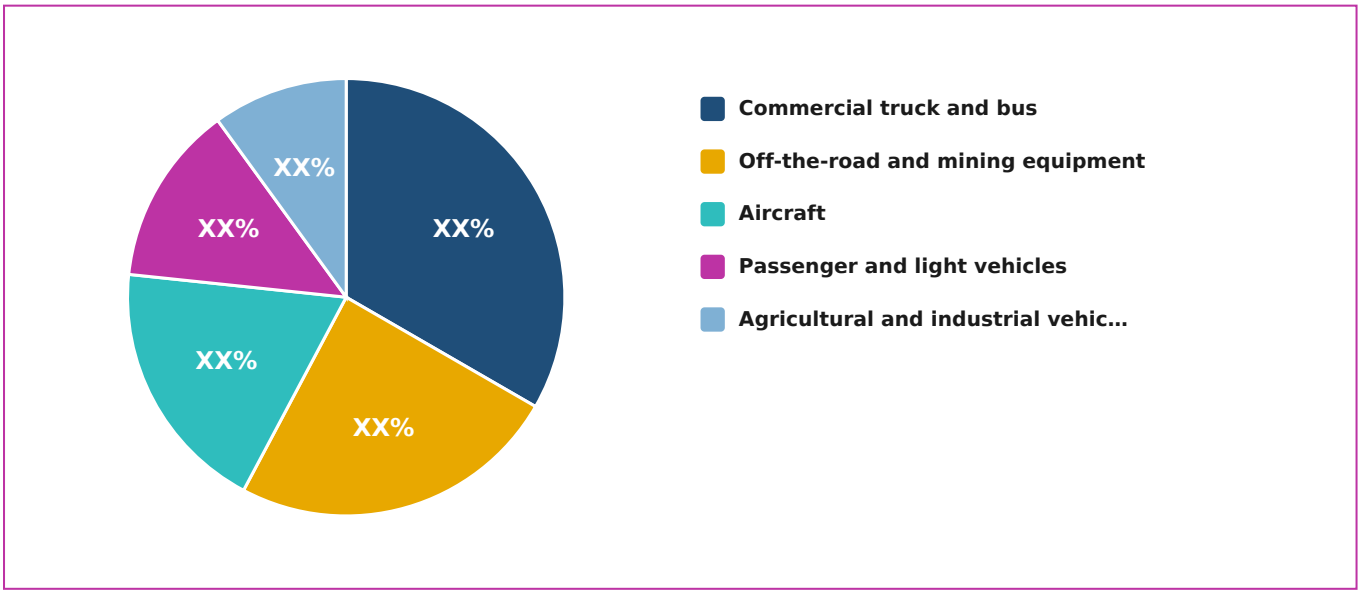
Value share by vehicle and Equipment Application, 2025



Source: XXX

Value by vehicle and Equipment Application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Commercial truck and bus	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Off-the-road and mining equipment	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Aircraft	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Passenger and light vehicles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Agricultural and industrial vehicles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales and Service Channel

Manufacturer-backed networks lead high-mileage fleet accounts by combining nationwide service coverage, audited processes and casing warranties. Independent retreaders remain essential in regional freight, construction, agriculture and price-sensitive emerging markets, where flexible casing acceptance and rapid local turnaround are decisive. Network share will rise as multinational fleets demand common quality controls and consolidated reporting.

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Value by sales and Service Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Manufacturer-backed and franchise networks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Independent retreaders	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Commercial Duty Cycle

Long-haul and regional freight leads because predictable mileage and scheduled maintenance enable disciplined casing recovery. Urban bus and municipal fleets maintain strong adoption through central depots and repeatable routes. Last-mile delivery grows fastest as parcel activity, stop-start driving and high-scrub manoeuvres accelerate tread wear and create demand for durable regional products.

Value by commercial Duty Cycle, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Long-haul and regional freight	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Urban bus and public transport	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Last-mile and parcel delivery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Construction, waste and vocational fleets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mining and heavy off-road operations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other specialist operations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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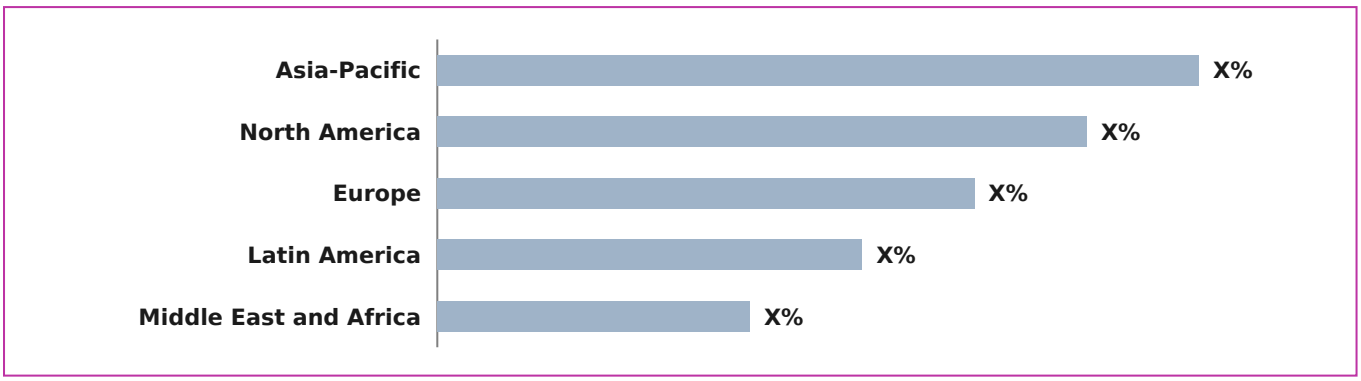
Retreaded Tyre Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global market value in 2025. China supplies the region's largest addressable commercial fleet and industrial base, while India combines rapid radialisation with a large independent retreading sector governed by Bureau of Indian Standards specifications for commercial and passenger retreads. Japan, South Korea and Australia contribute smaller but higher-value demand through tightly managed truck, bus, mining and aviation fleets.

North America remains the most institutionalised fleet-retread market, supported by national service networks, casing-bank programmes and high adoption among large carriers. Approximately XXX tyres are retreaded annually in the United States, and nearly XX% of commercial truck tyres in the United States and Canada are retreads. Consolidation among plants is shifting volume toward large dealers and manufacturer-backed franchises equipped with shearography, digital tracking and automated workflows.

Latin America will expand fastest at a XX% CAGR through 2031. Brazil combines a mature tyre-remanufacturing culture with mandatory conformity requirements administered by INMETRO, while Mexico benefits from cross-border freight, domestic tread-rubber production and expanding commercial service networks. Europe advances through circular procurement and UN Regulation No. 108 and No. 109 compliance, although freight-market maturity limits unit growth compared with Latin America and Asia.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Retreaded Tyre Market Competitive Landscape and Company Share

The market is moderately concentrated at the technology and network level but fragmented at the plant level. Bridgestone's Bandag, Michelin, Goodyear and Continental lead premium truck retreading through proprietary compounds, casing systems, dealer networks and fleet contracts, while Marangoni and Vipal compete strongly in pre-cure systems and independent-retreader supply. Regional specialists retain defensible positions where collection density, turnaround time and customer-owned casing programmes matter more than global scale.

Competition is moving beyond tread price toward total casing yield, cost per kilometre and service coverage. Leading networks connect new tyres, inspection, pressure monitoring, roadside assistance, retreading and end-of-life recovery in one account structure. Michelin's TreadVision launch and Continental's expanding ContiTread range demonstrate how automation, data capture and application-specific compounds are becoming central differentiators.

Capacity investment is selective rather than broad-based. Bridgestone's USD XXX million expansion of its Abilene tread-rubber operation strengthened Bandag's upstream capacity, while dealer and franchise networks are investing in shearography, automated handling and traceability. Acquisitions will focus on high-density regional dealers, casing inventories and plants that extend collection routes into underserved freight corridors.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Bridgestone Corporation	XXX	XXX	XXX	XXX
Compagnie Générale des Établissements Michelin	XXX	XXX	XXX	XXX
The Goodyear Tire & Rubber Company	XXX	XXX	XXX	XXX
Continental AG	XXX	XXX	XXX	XXX
Marangoni S.p.A.	XXX	XXX	XXX	XXX
Vipal Rubber Corporation	XXX	XXX	XXX	XXX
Kal Tire	XXX	XXX	XXX	XXX
Elgi Rubber Company Limited	XXX	XXX	XXX	XXX
Indag Rubber Limited	XXX	XXX	XXX	XXX
Vaculug Limited	XXX	XXX	XXX	XXX

Source: XXX

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Retreaded Tyre Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031. Growth will be led by organised commercial-fleet programmes, emerging-market radialisation and higher-value OTR and aviation work, while passenger-car retreading remains a specialised niche. Revenue growth will outpace unit growth as premium low-rolling-resistance compounds, inspection services and digital casing management increase value per transaction.

The central forecast assumes steady freight activity, continued adoption of circular procurement and a widening cost gap between premium new tyres and retreading. A stronger regulatory preference for remanufactured products would lift network utilisation and casing values; prolonged discounting of imported new tyres would slow independent-plant volumes and accelerate consolidation.

The strongest operators will secure casing supply before expanding curing capacity. Closed-loop contracts, early pull-point analytics, application-specific tread portfolios and verified product-carbon data will protect margins. Plants that cannot provide traceability, repeatable inspection outcomes and dependable collection schedules will lose share to integrated regional networks.

Opportunities

- AI-enabled shearography and automated casing grading
- Electrified urban fleet retreads designed for high torque and scrub
- Mining and construction OTR casing-life extension
- Carbon-accounted retread products for procurement reporting
- Franchise expansion in Latin America, India, Southeast Asia and Africa
- Digital tyre identification and closed-loop casing traceability

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