

# 2025 END-OF-LIFE TIRE MARKET TRENDS DRAFT

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# About the U.S. Tire Manufacturers Association

The U.S. Tire Manufacturers Association (USTMA) is the national trade association for tire manufacturers that produce tires in the U.S. U.S. tire manufacturing has an annual economic footprint of \$259.5 billion and is responsible for more than 329,527 jobs in manufacturing, distribution and retailing.

More information can be found at <https://www.ustires.org/>.

The logo for Bridgestone, featuring a stylized 'B' with a red and white diagonal stripe to its left, followed by the word 'BRIDGESTONE' in a bold, black, sans-serif font.The logo for Continental, with the word 'Continental' in a blue, rounded font and a circular emblem to the right containing a globe and the word 'CONTINENTAL'.The logo for Giti, consisting of the word 'Giti' in a bold, black, sans-serif font on a yellow background, followed by a black silhouette of a horse's head.The logo for Goodyear, featuring the words 'GOODYEAR' in a bold, yellow, sans-serif font on a blue background, with a yellow lightning bolt symbol above the 'Y' and the tagline 'MORE DRIVEN.' below.The logo for Hankook, with a stylized orange and black graphic element to the left of the word 'Hankook' in a bold, black, sans-serif font, and the tagline 'driving emotion' in a smaller font below.The logo for Kumho Tire, with the words 'KUMHO' and 'TIRE' stacked vertically in a bold, black, sans-serif font.The logo for Michelin, featuring the iconic Michelin Man character in white with red stripes on his arms, above the word 'MICHELIN' in a bold, blue, sans-serif font, and the tagline 'A BETTER WAY FORWARD' in a smaller font below.The logo for Nokian Tyres, with the words 'NOKIAN' and 'TYRES' stacked vertically in a bold, black, sans-serif font.The logo for Pirelli, with the word 'PIRELLI' in a bold, red, sans-serif font on a yellow background.The logo for Toyo Tires, with the words 'TOYO TIRES' in a bold, blue, sans-serif font.The logo for Yokohama, featuring a stylized red and black graphic element to the left of the word 'YOKOHAMA' in a bold, black, sans-serif font.

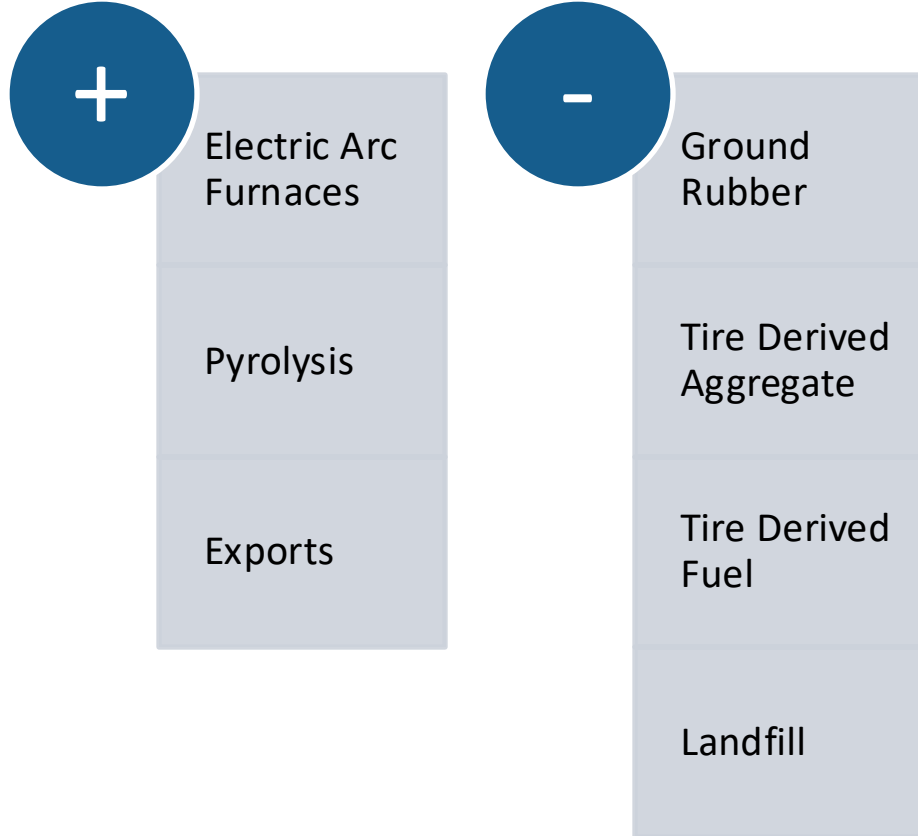
# USTMA ELT Sustainability Vision

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- **USTMA members have the goal that all ELTs enter sustainable and circular end-use markets.**
- USTMA's 2025 End-of-Life Tire Market Summary report measures our progress towards meeting our sustainability vision

# State of the Markets

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# USTMA ELT Management Report Creation

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- How report is created
  - Receive information from Processors and States (Thank you!)
  - Review association summaries
  - Trade and general press information
  - End-user and processor discussions
  - Website and ESG reporting
  - Consulting with expert ELT market analysts
  - Internet research using AI tools
- 2025 report – current status
  - Many 2025 state and association reports are not yet available
  - Need to cross-check processor data and double check consistency
  - More comparison and analysis needs to be reviewed

# Figures/Data and Statements

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- Specific figures/data are from 2023
- Statements made about direction of 2025 market growth are based on trends being discerned from currently available processor data, association summaries, trade and general press information, end-user and processor discussions, website and ESG reporting, expert ELT market analysts, and internet research using AI tools.

# ELT Generation rate

## U.S. Scrap Tire Generation 2023 vs. 2025

	2023	2025	2023	2025	2023	2025	2023	2025
Tire Class	Millions of Tires		Market %		Avg Weight (lbs)		Weight (thousands of tons)	
<b>Light Duty Tires</b>	267	273	87.7%	86.6%	25.0	25.0	3,334	3,411
Passenger tire replacements	219	222	72.1%	70.3%				
Light truck tire replacements	34	38	11.3%	12.0%				
Tires from scrapped vehicles	13	14	4.3%	4.3%				
<b>Commercial Tires</b>	37	42	12.3%	13.4%	120.0	120.0	2,238	2,526
Medium, wide base, heavy truck replacement tires	21	25	6.8%	8.0%				
Tires from scrapped trucks and buses	17	17	5.4%	5.4%				
<b>Total tires hauled</b>	<b>304</b>	<b>315</b>	<b>100.0%</b>	<b>100.0%</b>	<b>36.7</b>	<b>37.7</b>	<b>5,572</b>	<b>5,937</b>
<b>Used tires sculled</b>	<b>40</b>	<b>42</b>	<b>13.2%</b>	<b>13.2%</b>	<b>36.7</b>	<b>37.7</b>	<b>735</b>	<b>784</b>
<b>Net scrap tires</b>	<b>264</b>	<b>273</b>					<b>4,836</b>	<b>5,154</b>

# Markets

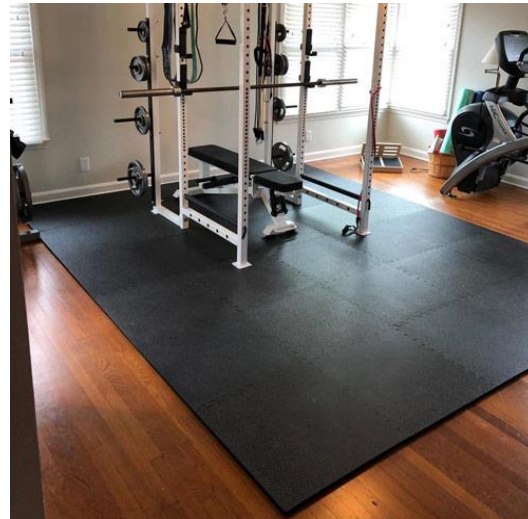
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- Ground Rubber
- Tire Derived Aggregate (TDA)
- Tire Derived Fuel (TDF)
- Electric Arc Furnaces (EAFs)
- Other
- Exports
- Landfill

# Ground Rubber - Molded & Extruded

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- 362,000 tons of ELTs were consumed by Molded & Extruded in 2023
- The current market is probably similar to 2023



# Ground Rubber – Rubber Modified Asphalt (RMA)

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- RMA consumed 165,000 tons of ELTs in 2023
- It appears this market is down slightly
- RMA demonstration work is expanding in states
- National average EPD for crumb rubber project in RMA under way



# Ground Rubber - Synthetic Turf

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- In 2023, the synthetic turf market consumed 349,000 tons of ELTs
- California Office of Environment Health Hazard Assessment (OEHHA) study provides key data with strong positive conclusions that could give this market some momentum again
- Alternative materials have grabbed some market share in the interim

# Ground Rubber - Playground and Mulch

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- In 2023 mulch consumed 385,000 tons of ELTs
- AI queries are telling us this market is growing in single digits
- Demand is being driven mostly by landscaping, playgrounds, and other low-maintenance, sustainability-oriented applications



# Tire Derived Aggregate (TDA)

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- TDA consumed 264,000 tons of ELTs in 2023
- Down slightly due to hesitations in California
- TDA SOK



# Tire Derived Fuel (TDF)

## Pulp & Paper Mills

- In 2023 paper mills consumed about 562,000 tons of ELTs
- Submarket is down
- 3 plants closed and 1 plant closed for 1/3 of the year

## Utility Boilers

- In 2023 utility boilers consumed about 200,000 tons of ELTs
- Down slightly
- 3 plants closed in MI due to removal of TDF from eligibility as a renewable energy source

## Cement Kilns

- In 2023 cement kilns consumed about 784,000 tons of ELTs
- Stayed about the same or maybe down a bit, no strong reason to believe it was up

# Electric Arc Furnaces (EAFs)

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- Devices that melt scrap steel or iron by generating powerful electric arcs between graphite electrodes and the metal, achieving temperatures of 3,000°C or more. Produce low-carbon steel through recycling, high efficiency, and operational flexibility.
- 70,000 tons of ELTs in 2023, this small but sustainable and circular market is probably increasing
- 6-7 locations



# Pyrolysis

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- Pyrolysis will be called out directly as a market in the next report
  - Now consumes >1% of US generation, which is notable
  - Further, just a couple pyrolysis plants coming online could double or triple the market
    - 2026 Projects: Bolder plant in Terre Haute, IN and the Ecolomundo plant in Shamrock, TX

# Other

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- Devulcanization
- Arts and crafts, tire swings
- Fence/windbreak
- Septic systems
- Water tanks
- Alternative daily cover

# Exports

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- In 2023 exports consumed about 252,000 tons of ELTs
- Increased in 2025 due to exports to India and Japan & Korea
  - Japan and Korea trade is up
  - New India trade has stabilized but is now a notable consumer in the market up from virtually nothing before 2020

# Landfill

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- 874,000 tons in 2023
- Landfill disposal decreased from 2023



# Conclusion

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- In summary
  - When we add all this up, ELTs are being consumed at a better rate than most consumer products, and are going into sustainable and, increasingly, circular markets
- Big changes we can expect to see
  - TDF Market in 2026
  - Export market
  - Synthetic turf infill market steady due to OEHHA study
  - Growing interest in RMA

# THANKS FOR YOUR CONTRIBUTIONS AND INSIGHTS!

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