



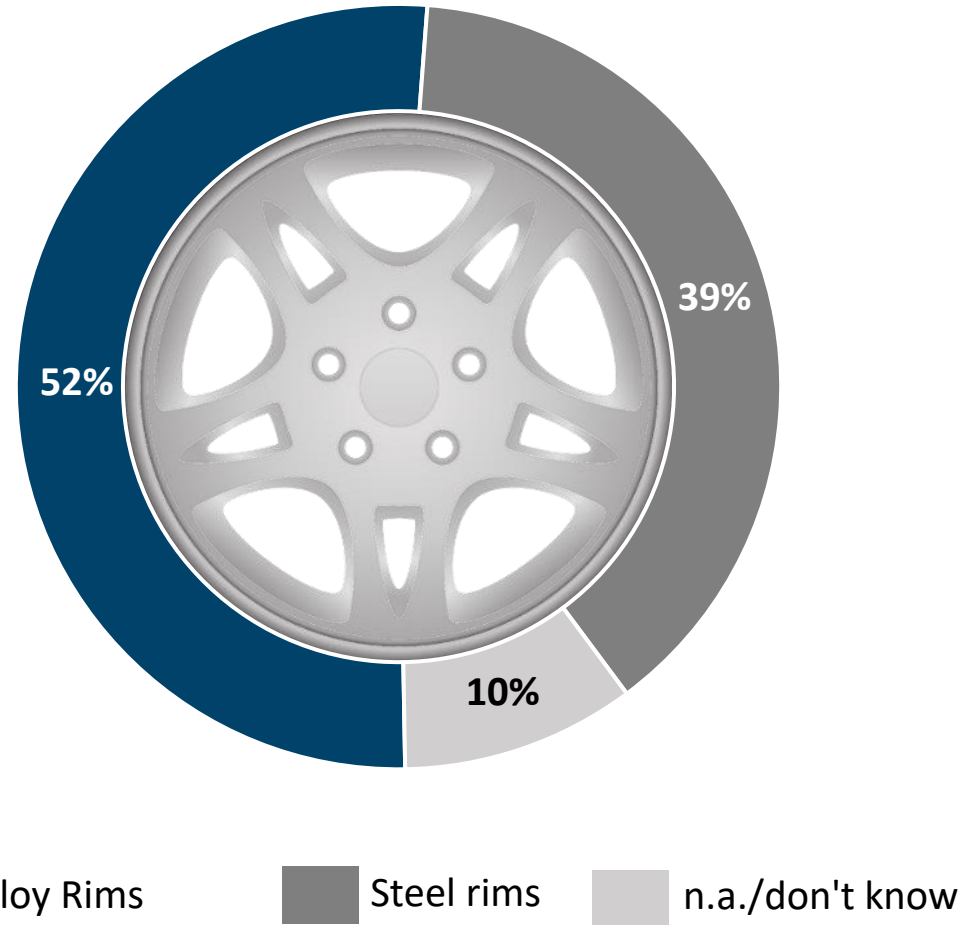
The Replacement Market for Tires in Germany 2024

– Passenger Cars / Off Road / SUV

Cologne, June 2024

The rim market

Cars equipped with alloy rims



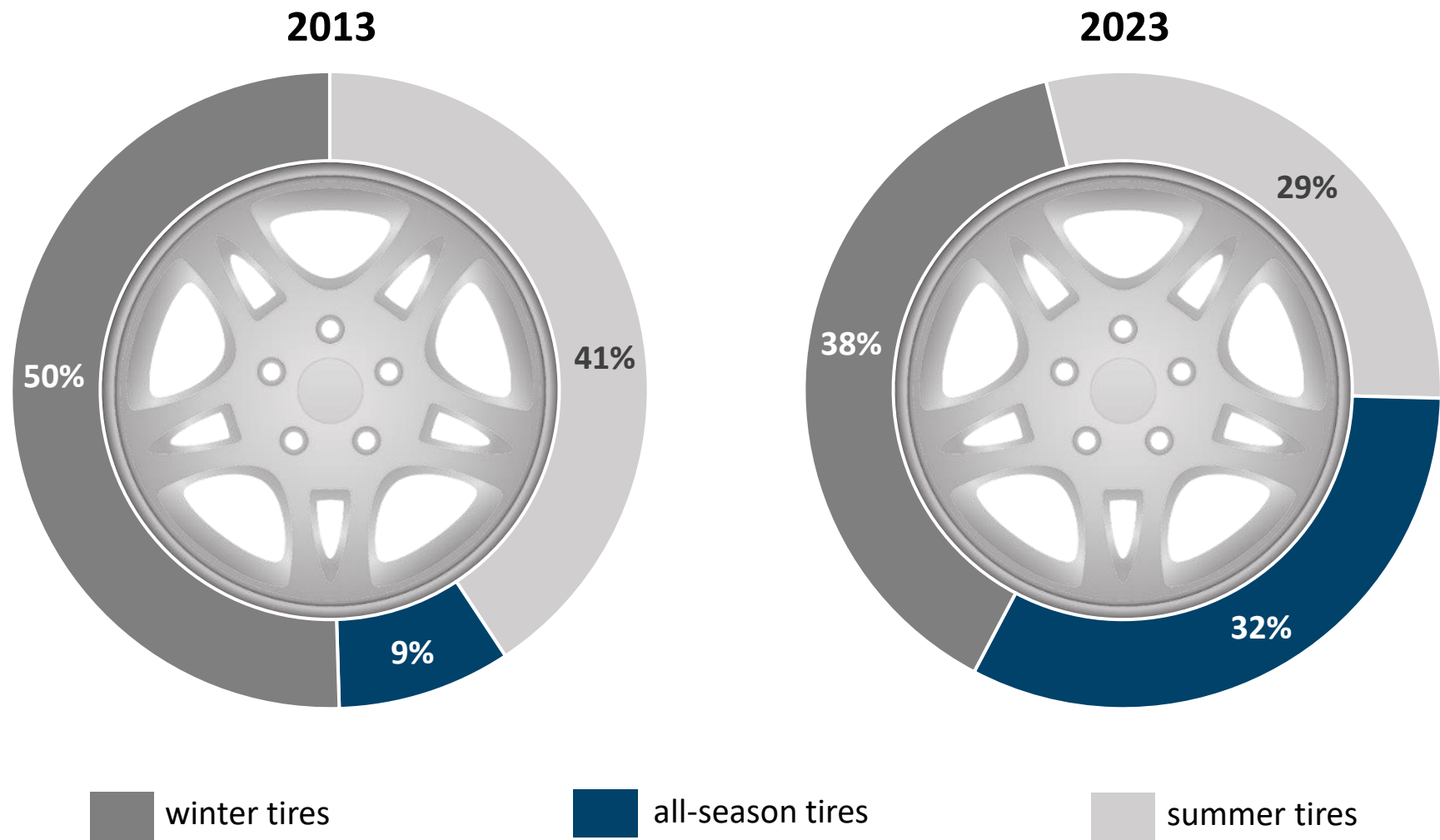
More than half of the cars are equipped with alloy rims during winter season.

Which kind of rims do you currently have fitted?

Source: BBE-Survey 2021-2024 (Base: n=8,000 Car drivers)

May 2024

Sales share by tire type 2013 vs. 2023 PC/4x4

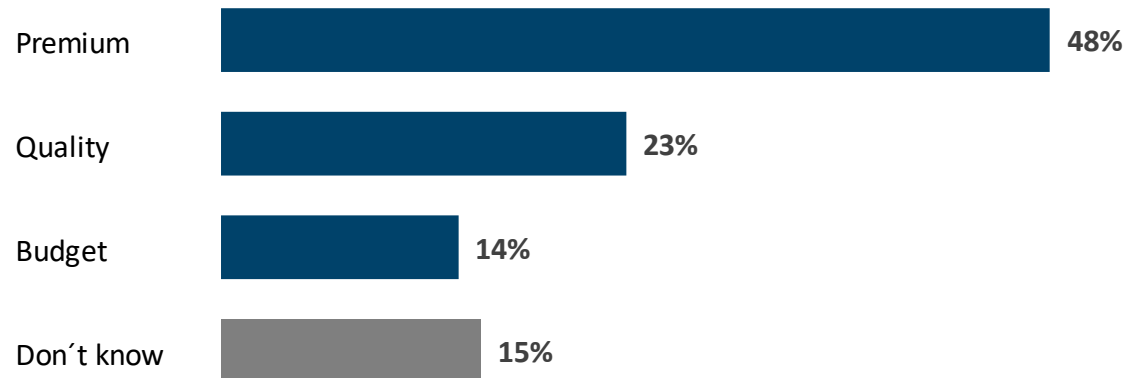


In the last 10 years the sales of all-season tires for PC and 4x4 have more than tripled, rising up to 32%.

Source: BRV (Bundesverband Reifen- und Vulkanisierhandwerk); BBE own calculations

Tire quality level of recent bought tires (winter season)

Classification



If the tires were purchased within the last 12 months, budget tire sales have seen a slight increase.

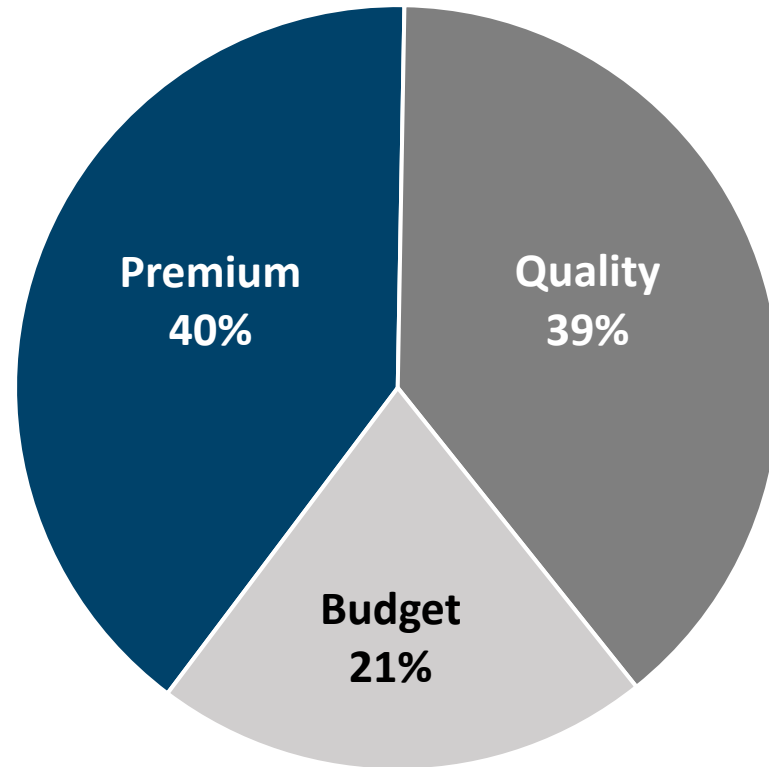
Additionally, one in seven tire buyers cannot recall the brand they purchased, despite it being just a few months after the purchase.

What brand of tires did you buy?

Source: BBE-Survey 2021-2024 (Base: n=1,677 Car drivers)

Brand orientation of consumers

Tire quality of sales via B2B online portals



Comparison of the information provided by car drivers on the brand of tires purchased with the sales figures from dealers:

A fifth of the tire sales of b2b portals are Budget tires.

B2B portals deliver mainly to IAM workshops.



Content of the study

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