

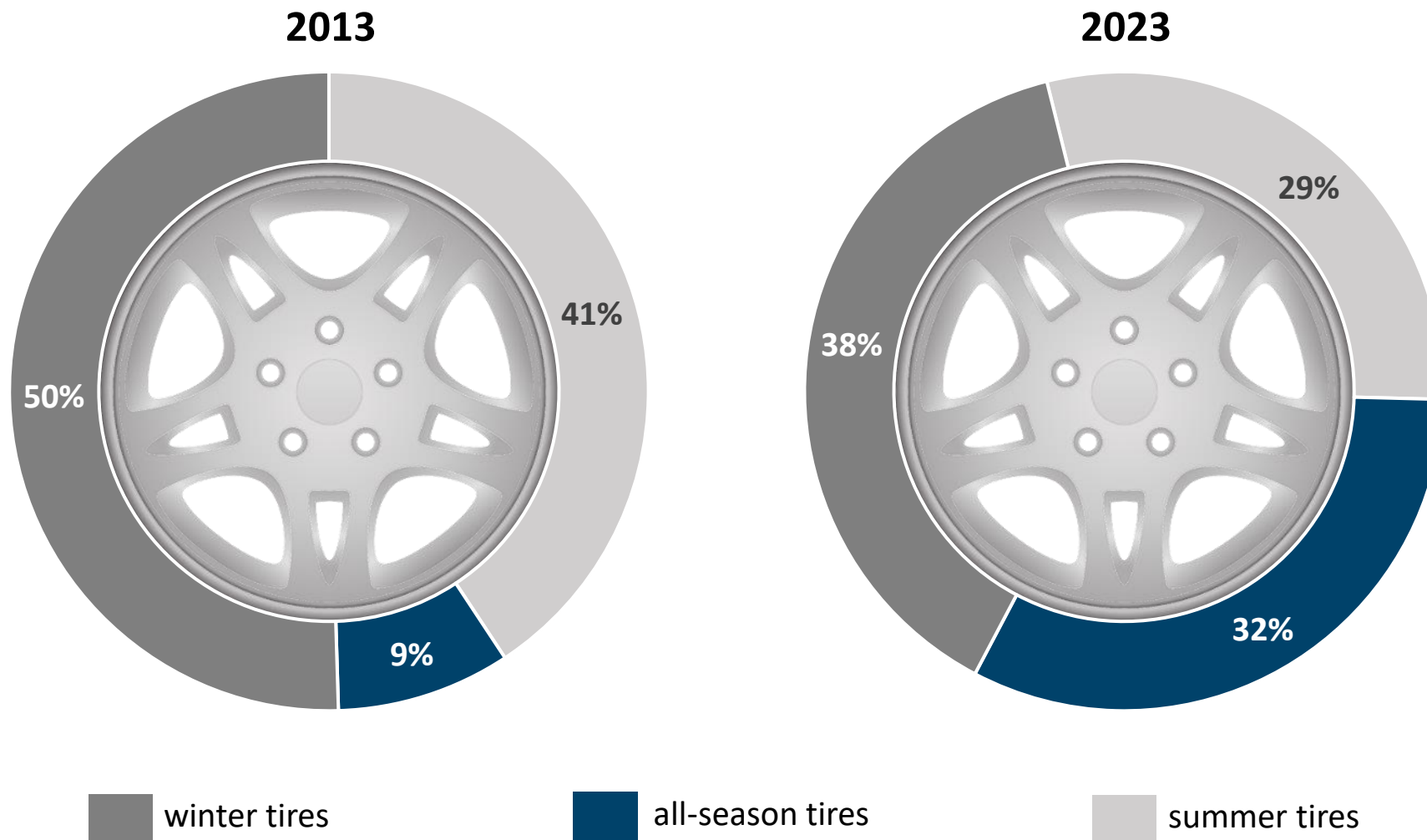


## **The Replacement Market for Tires in Germany 2024**

### **– Passenger Cars / Off Road / SUV**

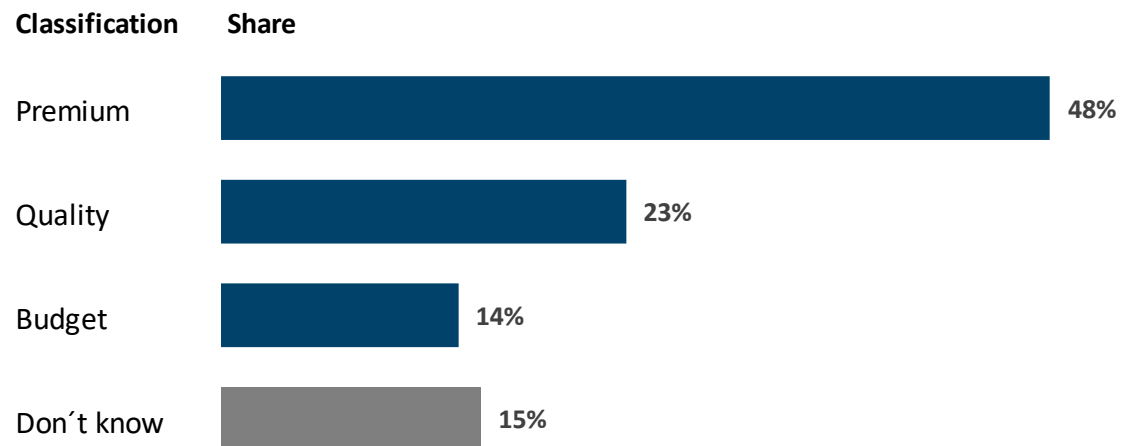
Cologne, May 2024

# 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%.

# Tire quality level of last bought tires (winter season)



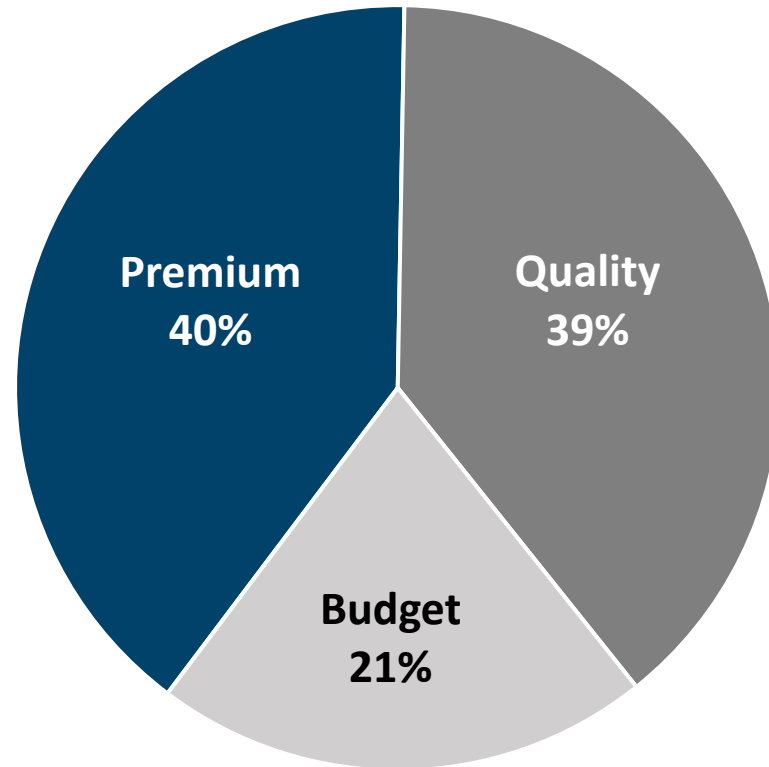
If the tires have been bought within the last 12 months, budget tires gained slightly more shares.

In addition, one of seven tire buyers can no longer remember which brand they bought, and that just a few months after the purchase.

R10: What brand of tires did you buy?

Source: BBE-Survey 2023-2024 (Base: n=4.000 Car Driver)

# Tire quality of sales via b2b online portals

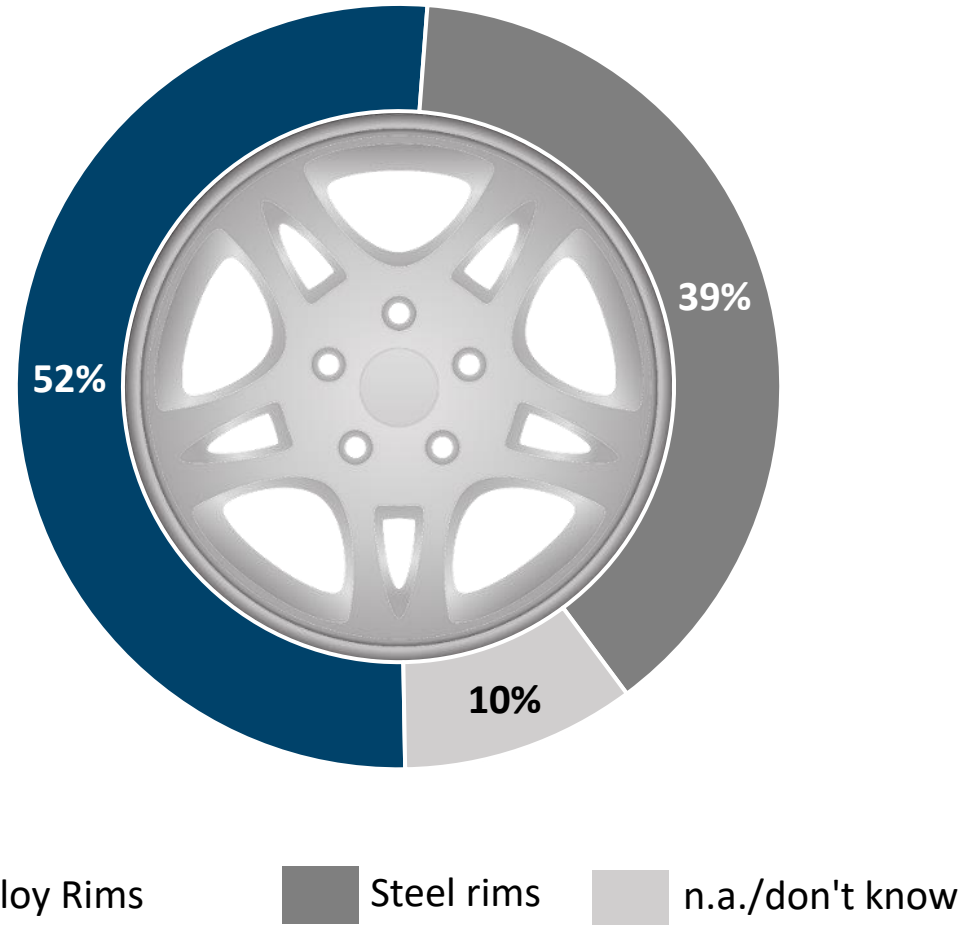


A fifth of the tire sales of b2b portals are Budget tires;

B2b portals deliver mainly to IAM workshops.

# The rim market


## Cars equipped with alloy rims



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

R2: Which kind of rims do you currently have fitted?

Source: BBE-Survey 2021-2024 (Base: n=8.000 Car Driver)



# Content of the study

- 1 The German vehicle market in a European context**
- 2 Tire market volumes**
- 3 End consumer**
- 4 Brand orientation of consumers**
- 5 Distribution structure of tire business**
- 6 The business of tire change**
- 7 The rim market**
- 8 Touchpoints of tire business**