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## Quarterly Replacement Tyre Market Overview Q2 2025

### UK Consumer tyre market volumes declined sharply in the first half

Members' replacement tyre volumes show a mixed picture for the second quarter and the first half of 2025, impacted by an increased share of imports, and changes in stockholding.

In the Consumer tyre segment, which includes car, SUV and light truck tyres, volumes fell sharply in the second quarter; following a 13% decline in the first quarter this resulted in a 16% reduction in units sold in the first half of 2025. Sales of new replacement Truck & Bus tyres increased by 3% in the quarter, a slight increase on the pace of growth in the first quarter and resulting in a 2% gain for the year to date. In the Motorcycle & Scooter tyre segment, volumes were flat for the first half of 2025, with an increase in the sales in the first quarter counterbalanced by a decline in the second quarter.



### UK, New Replacement Tyre Volumes

000s Units	Q1 Change	2024 Q2	2025 Q2	Q2 Change	2024 H1	2025 H1	H1 Change
<b>Consumer</b>	13%	4,786	3,888	-19%	9,330	7,836	-16%
<b>Truck &amp; Bus</b>	2%	275	283	3%	520	532	2%
<b>Moto &amp; Scooter</b>	9%	213	198	-7%	393	395	0%

Discrepancies with data previously published can happen because of periodic data corrections.  
Consumer = Passenger car, SUVs and light commercial vehicles. Source: EUROPOOL ETRMA.

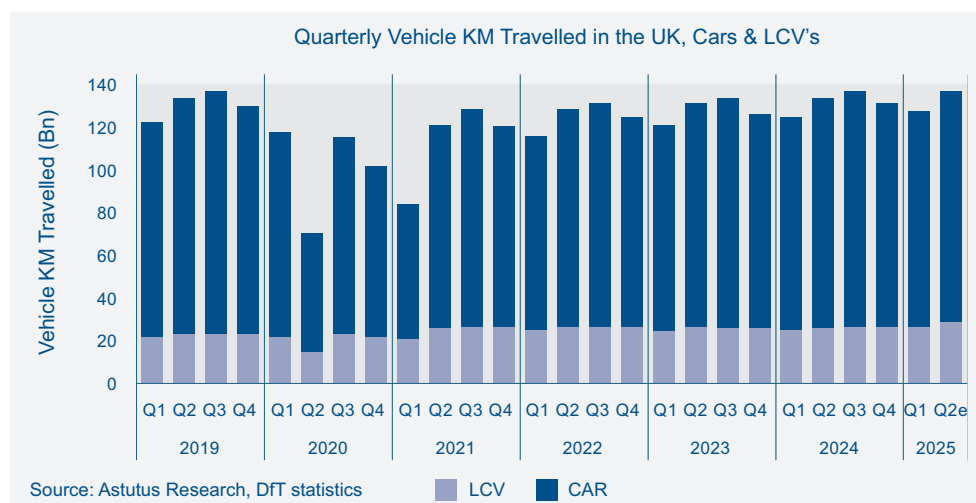
In the Consumer segment, UK replacement volumes have been held back in recent years by the tough economic environment. Motorists have been driving less: aggregate mileage for light vehicles has only just returned to pre-Covid levels, and for cars it remains below 2019 levels. With consumers impacted by steep increases in living costs (particularly energy bills and higher interest rates), data suggests that motorists have delayed tyre replacement. Members sales volumes have also clearly been impacted by the growth in low-cost imports. The cost of producing tyres in Europe has increased at a faster pace than in other regions, widening the price differential between 'locally' produced and imported tyres. As consumers have increased their purchases of 'budget' tyres, this has led to an increase in imports, particularly from China.

For the Truck & Bus segment, although total truck traffic recovered well following the Covid-pandemic, economic headwinds resulted in declines in truck mileage from the second quarter of 2022 through to the end of 2024. There has been a slight increase in the first half of 2025, positively impacting demand for truck tyres.

### About the BTMA and this update

This Quarterly Update has been prepared for the BTMA by Astutus Research, an independent provider of market intelligence focused on the tyre industry, mobility (tyre usage) and tyre recovery & recycling. For further information please contact [info@astutusresearch.com](mailto:info@astutusresearch.com) or visit [www.astutusresearch.com](http://www.astutusresearch.com)

## UK light vehicle miles travelled approaches pre-pandemic levels in H1 2025



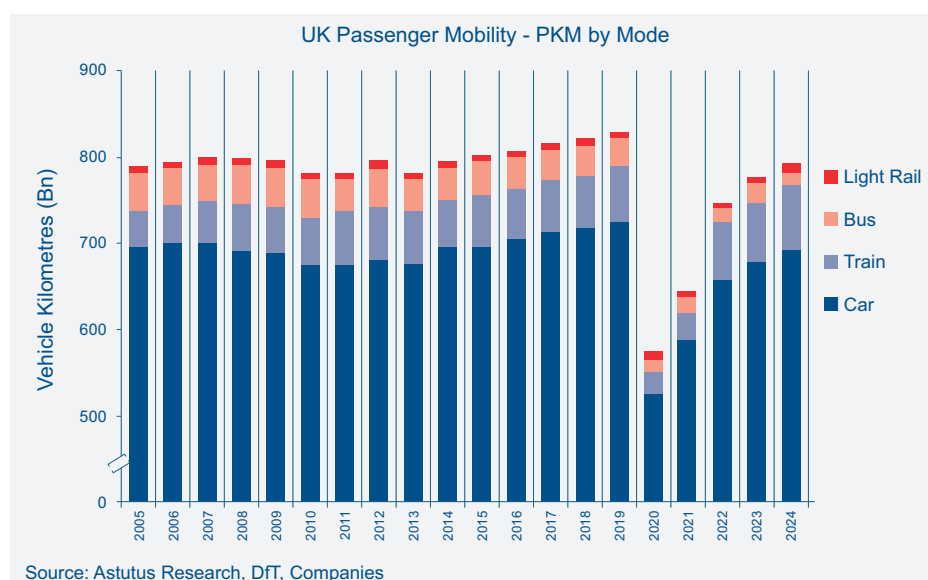
### Car & LCV Vehicle KM Travelled

	H1 2025
Year on Year Growth	0.6%
Index 2019=100	100.2

Source: Astutus Research estimates.

Tyre replacement is strongly correlated with aggregate vehicle mileage. Astutus Research estimates that in the first half of 2025, miles travelled for light vehicles (cars and light commercial vehicles) finally reached the levels achieved in the pre-pandemic period. However, whilst light commercial vehicle (LCV) mileage is now significantly above pre-Covid levels, car traffic is yet to fully recover. The strong performance of LCVs is due in part to the rapid growth in home deliveries. For cars, there has been a structural change in commuting and business travel habits, with hybrid working (home and office) expected to remain the norm for many. Although there has been a slow but gradual increase in the share of office-based working, home working remains more prevalent in the UK than many other European markets and this is reflected in mobility data. Astutus Research estimates that aggregate miles travelled for light vehicles rose by 0.6% in the first half of 2025, with a strong showing in Q2, taking it just above the level of the equivalent period in 2019.

## Passenger mobility remains significantly below pre-Covid levels



### Passenger Mobility 2024

	y-o-y Growth	Index 2019=100
Car	0.7%	96.2
Train	9.3%	92.1
Bus/Coach	0.0%	86.1
Light Rail	2.2%	87.2

Source: Astutus Research estimates.

Comparing data on passenger transport by mode (passenger kilometres, PKM) shows that overall mobility remained significantly below pre-Covid levels by the end of 2024, with the recovery in public transport trailing that of private car travel. Train passenger kilometres reached only 92% of 2019 levels - among the weakest recoveries in Europe. Nevertheless, train travel grew by over 9% during the year, supported by relatively few strike days. This appears to mark the beginning of a more sustained recovery, with a further estimated 5% increase in the first half of 2025. The recovery in bus and light rail travel (the latter heavily influenced by London Underground traffic) has been slower, with both modes remaining below 90% of 2019 levels by the end of 2024. London Underground journeys rose in the first half of 2025, although bus travel is expected to have declined, likely due to fare cap increases in some regions.

# UK New Car Registrations

## Chinese brands capture over 8% of new car registrations in the first half of 2025

June	Volumes		% Market Share		Change in Market Share
Marquee	YTD 2025	YTD 2024	YTD 2025	YTD 2024	
Volkswagen	94,156	83,552	9.0%	8.3%	0.7%
BMW	65,698	69,827	6.3%	6.9%	-0.6%
Kia	62,005	60,366	6.0%	6.0%	0.0%
Ford	60,402	56,735	5.8%	5.6%	0.2%
Audi	53,538	65,317	5.1%	6.5%	-1.4%
Nissan	49,149	54,936	4.7%	5.5%	-0.7%
Hyundai	48,778	46,404	4.7%	4.6%	0.1%
Peugeot	48,660	34,653	4.7%	3.4%	1.2%
Mercedes Benz	47,970	51,732	4.6%	5.1%	-0.5%
Vauxhall	46,682	45,324	4.5%	4.5%	0.0%
Toyota	46,349	51,117	4.5%	5.1%	-0.6%
Skoda	43,837	37,641	4.2%	3.7%	0.5%
MG	42,617	44,046	4.1%	4.4%	-0.3%
Land Rover	35,247	32,846	3.4%	3.3%	0.1%
Volvo	33,870	30,422	3.3%	3.0%	0.2%
Renault	33,237	28,596	3.2%	2.8%	0.4%
Tesla	22,721	23,029	2.2%	2.3%	-0.1%
MINI	21,953	21,273	2.1%	2.1%	0.0%
BYD	19,390	2,904	1.9%	0.3%	1.6%
Cupra	19,122	13,917	1.8%	1.4%	0.5%
Mazda	18,809	14,083	1.8%	1.4%	0.4%
Dacia	16,125	16,162	1.6%	1.6%	-0.1%
Honda	13,220	17,774	1.3%	1.8%	-0.5%
SEAT	12,324	21,346	1.2%	2.1%	-0.9%
Porsche	9,531	9,062	0.9%	0.9%	0.0%
Suzuki	9,499	13,588	0.9%	1.4%	-0.4%
Citroen	9,383	15,817	0.9%	1.6%	-0.7%
Lexus	8,784	8,036	0.8%	0.8%	0.0%
Jaecoo	8,399	-	0.8%	0.0%	0.8%
Polestar	8,323	2,742	0.8%	0.3%	0.5%
Omoda	6,941	-	0.7%	0.0%	0.7%
Jeep	6,624	3,756	0.6%	0.4%	0.3%
Fiat	6,136	8,062	0.6%	0.8%	-0.2%
Jaguar	1,725	10,626	0.2%	1.1%	-0.9%
Alfa Romeo	1,308	871	0.1%	0.1%	0.0%
Subaru	1,261	1,426	0.1%	0.1%	0.0%
DS	948	578	0.1%	0.1%	0.0%
Genesis	789	556	0.1%	0.1%	0.0%
KGM	835	979	0.1%	0.1%	0.0%
smart	775	1,062	0.1%	0.1%	0.0%
Bentley	530	473	0.1%	0.1%	0.0%
Leapmotor	542	-	0.1%	0.0%	0.1%
Alpine	327	220	0.0%	0.0%	0.0%
Abarth	201	445	0.0%	0.0%	0.0%
GWM	193	895	0.0%	0.1%	-0.1%
Other	3,306	3,567	0.3%	0.4%	0.0%
<b>Total</b>	<b>1,042,219</b>	<b>1,006,763</b>			

Source: SMMT

According to data from the SMMT, new car registrations in the UK rose by 3.5% in the first six months of 2025, representing the best first half performance since 2019.

Nevertheless, new registrations were still down 18% compared with the same period of 2019. Each year between 2014 and 2019, more than 1.25 million new cars were registered in the first six months.

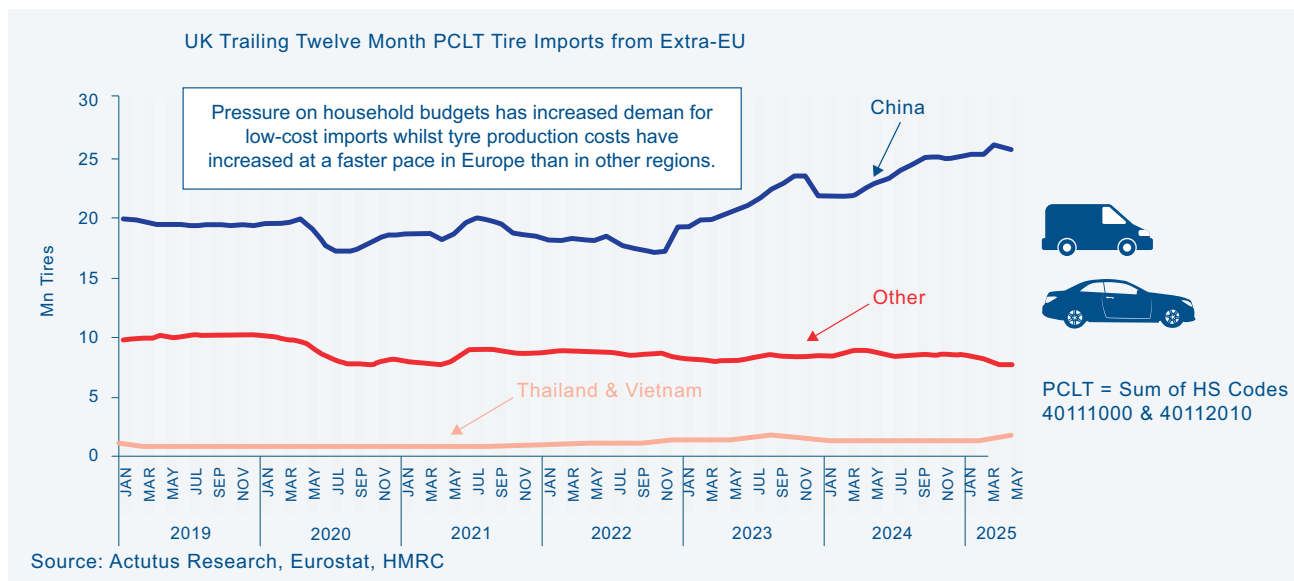
The rapid growth of the Chinese\* brands has continued in the period, with their collective year to date market share reaching 8.4% in the first six months, compared with 5.1% in the same period of 2024. If these trends continue there will be a further diversification of the UK car parc in the coming years.

Unlike the European Union, the UK has not introduced tariffs on electric vehicles imported from China, although it is believed that they will not be eligible for recently announced Electric Car Grant.

In total, battery electric vehicles (BEVs) accounted for 21.6% of new car registrations in the first six months of 2025, up from 16.6% in the same period of 2024. Plug in hybrids (PHEVs) represented a further 10.3% of the market, up from 8.1% in 2024.

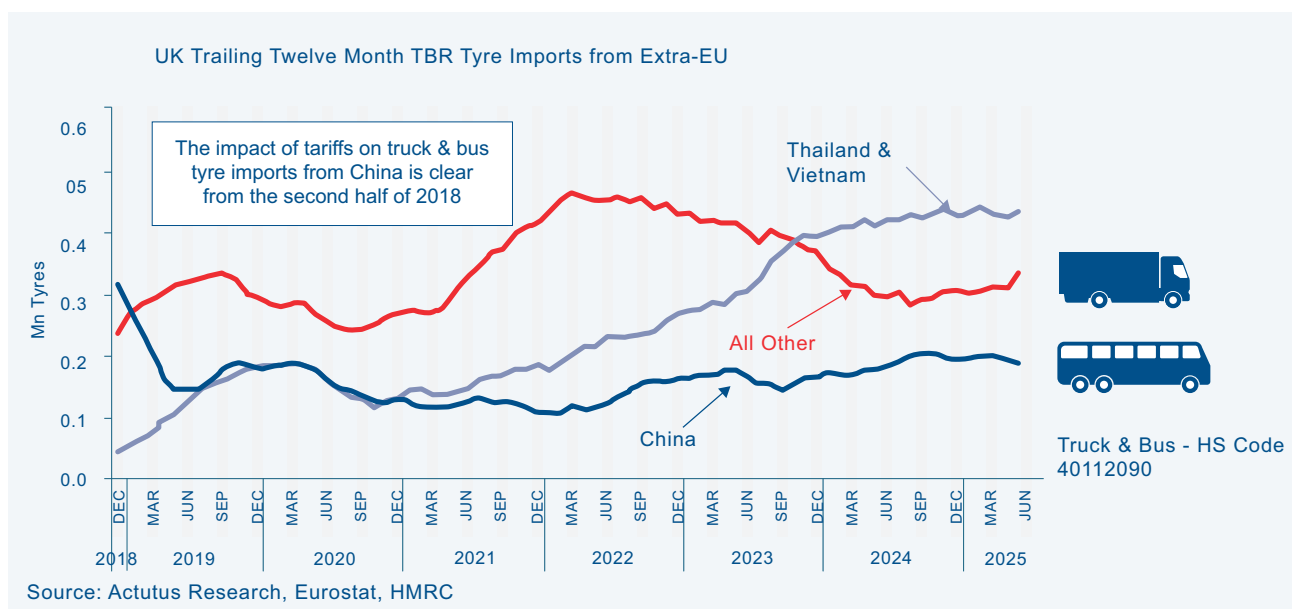
\*Note: We do not include Volvo (owned by Geely) in the list of Chinese brands, but do include Polestar, and smart.

## PCLT tyre imports fell slightly in the first five months of 2025



The volume of passenger car and light truck (PCLT) tyres imported to the UK from outside the EU fell by 2% in the first five months of 2025, however this follows a 10% increase in 2024. There was a further 2% growth in units imported from China in the period, whilst the volume from other sources declined by 14%. There was a sharp fall in the number of tyres originating in Turkey, and a smaller reduction in the volumes from Serbia, Korea and Japan. Although the numbers currently remain relatively small, there was a nine-fold increase in PCLT tyres imports from Vietnam in the first five months of 2025 and volumes are expected to continue to grow rapidly as production capacity has expanded.

## Truck & Bus tyre imports from Thailand and Vietnam stabilise in 2025



Truck and bus tyre imports to the UK from outside the EU increased by almost 8% in the first five months of 2025. There was a near 6% decline in the volume of TBR tyres from China in the period, whilst imports from Vietnam and Thailand were stable after the very significant growth of the past few years. The number of tyres from other sources has risen in the first five months of 2025, with growth in volumes from Korea, Indonesia and India.