EU TRADE EXPLORER

Market evolution: Pneumatic tyres (CN 4011) — 2015–2025

Introduction

New pneumatic rubber tyres (CN 4011) form a pivotal part of EU external trade, covering car, bus, lorry, agricultural, construction, motorcycle, bicycle and aircraft tyres. The decade from 2015 to 2025 saw the EU's position in this market transform profoundly. A once small trade surplus turned into a significant deficit, driven by a surge in low-cost imports. At the same time, EU producers moved decisively into higher-value, premium products. This report identifies and explains the main dynamics using annual trade and production data, following the EU's trade with non-EU partners over eleven full years.

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1. From small surplus to large deficit: the imbalance in EU tyre trade is driven by surging import volumes and contrasting price trends

The overall trade balance swung from a surplus of €132 million to a deficit of €2.1 billion

EU trade overview

In 2015 the EU still enjoyed a small trade surplus of €132 million. By 2025 the balance had deteriorated to a deficit of €2 141 million. The shift was caused by a much faster rise in imports than exports. Over the period, export value grew by 18.7 % to €8.56 billion, while import value surged by 51.2 % to €10.71 billion.

Import quantities rose strongly while export volumes actually shrank

While import volumes jumped by 41.5 % (from 1.91 million to 2.71 million units), export volumes fell by 17.6 % (from 1.50 million to 1.24 million units). The resulting picture is one of the EU absorbing far more tyres from third countries while shipping fewer units abroad.

A stark divergence in unit prices explains the different value paths

Export unit price rose by 44.1 %, from €4 802 to €6 918 per unit, whereas import unit price increased by only 6.8 %, from €3 701 to €3 953. This shows that the EU is selling ever more expensive tyres to the rest of the world, while buying much cheaper ones in vastly greater quantities.

Indicator (EUR/unit)	2015	2025	Change
Export price	4 802	6 918	+44.1 %
Import price	3 701	3 953	+6.8 %

2. China and other Asian suppliers deepened their foothold, while Russia vanished as an export market and price shocks hit key partners

China reinforced its lead as the dominant import source, and overall supplier concentration increased

Top partners – imports

Imports from China more than doubled, from €1.79 billion to €3.63 billion (+102.7 %). Alongside China, Türkiye (+103.0 %), India (+186.5 %), Korea (+117.5 %), Thailand (+118.7 %) and Serbia (+188.8 %) all registered triple-digit or near-triple-digit growth. The Herfindahl-Hirschman Index (HHI) for imports rose from 1 228 to 1 606 (+30.9 %), indicating that supply is increasingly concentrated among these top partners, with China accounting for 36.5 % of total import value by 2025.

The EU's export map was reshaped by the loss of Russia and a post-Brexit price shock on UK imports

Top partners – exports

Exports to Russia collapsed from €313 million to €41 million (–86.9 %) following sanctions. Meanwhile, the United Kingdom remained the top destination despite a slight drop (–7.5 %), and the United States grew by 38.9 % to become the second most important market. On the import side, a major price shock hit UK-sourced tyres in 2021: the unit price jumped by 61.5 % while quantities fell sharply, a legacy of new trade barriers.

Import price spikes in 2022 hit supply from India, China and Thailand

Price shock events

2022 saw import price shocks from three major suppliers: India (+22.2 %), China (+37.1 %) and Thailand (+25.1 %). Though volumes continued to increase, the sudden price rises reflected post-COVID supply chain tensions, rising raw material costs and logistics bottlenecks, and they temporarily pushed up the overall import bill.

3. EU production shifted to high-value tyres while Central-Eastern Europe gained export share, but reliance on imports deepened

Domestic output fell in volume but surged in value, signalling a clear move into premium products

Production volumes and value

EU tyre production quantity dropped from 361 million units in 2003 to 286 million in 2024 (–20.7 %). Over the same horizon, production value climbed from €14.0 billion to €20.7 billion (+47.6 %), implying that the average unit value of EU-made tyres rose significantly as producers concentrated on more sophisticated, higher-margin segments such as aircraft, construction and premium car tyres.

Central and Eastern European member states became the new export powerhouses, while Germany lost ground

Top EU reporters – exports

Germany, historically the largest EU exporter, saw its external tyre exports drop by 32.7 % from €1.93 billion to €1.30 billion. In contrast, Spain (+67.4 %), Czechia (+49.9 %), Poland (+56.0 %), Slovakia (+85.3 %) and Romania (+56.2 %) all expanded sharply. This geographical shift reflects the growing specialisation of these countries; in 2025, Romania held an RSCA of 0.65, Slovakia 0.52 and Luxembourg 0.76, while Germany registered a negative RSCA of –0.15, confirming its relative loss of export focus in tyres.

The EU’s trade openness expanded, and net import reliance moved from self-sufficiency to dependence

Net import reliance

Trade intensity (exports plus imports relative to EU production) rose from 36.2 % to 61.2 %, and export propensity climbed from 22.5 % to 42.4 %. The net import reliance ratio flipped from –1.0 % (a small net-export position) in 2003 to +5.7 % in 2024, meaning the EU now relies on foreign producers for around 5.7 % of its tyre consumption. Although still moderate, the trend points to a growing exposure to external supply shocks.

Conclusion

Between 2015 and 2025 the EU’s tyre trade underwent a fundamental reconfiguration. Exports shrank in volume but rose in value thanks to a decisive move toward premium products. Imports, by contrast, soared both in volume and in value, led by China and other low-cost Asian producers, pushing the trade balance deep into the red. At the same time, EU production contracted in units but became far more valuable, with Central and Eastern European countries capturing a larger share of external sales at Germany's expense. The bloc's openness to trade has grown markedly, and its net reliance on imports has increased, a development that, together with higher supplier concentration and recent price shocks, deserves close monitoring in the years ahead.
