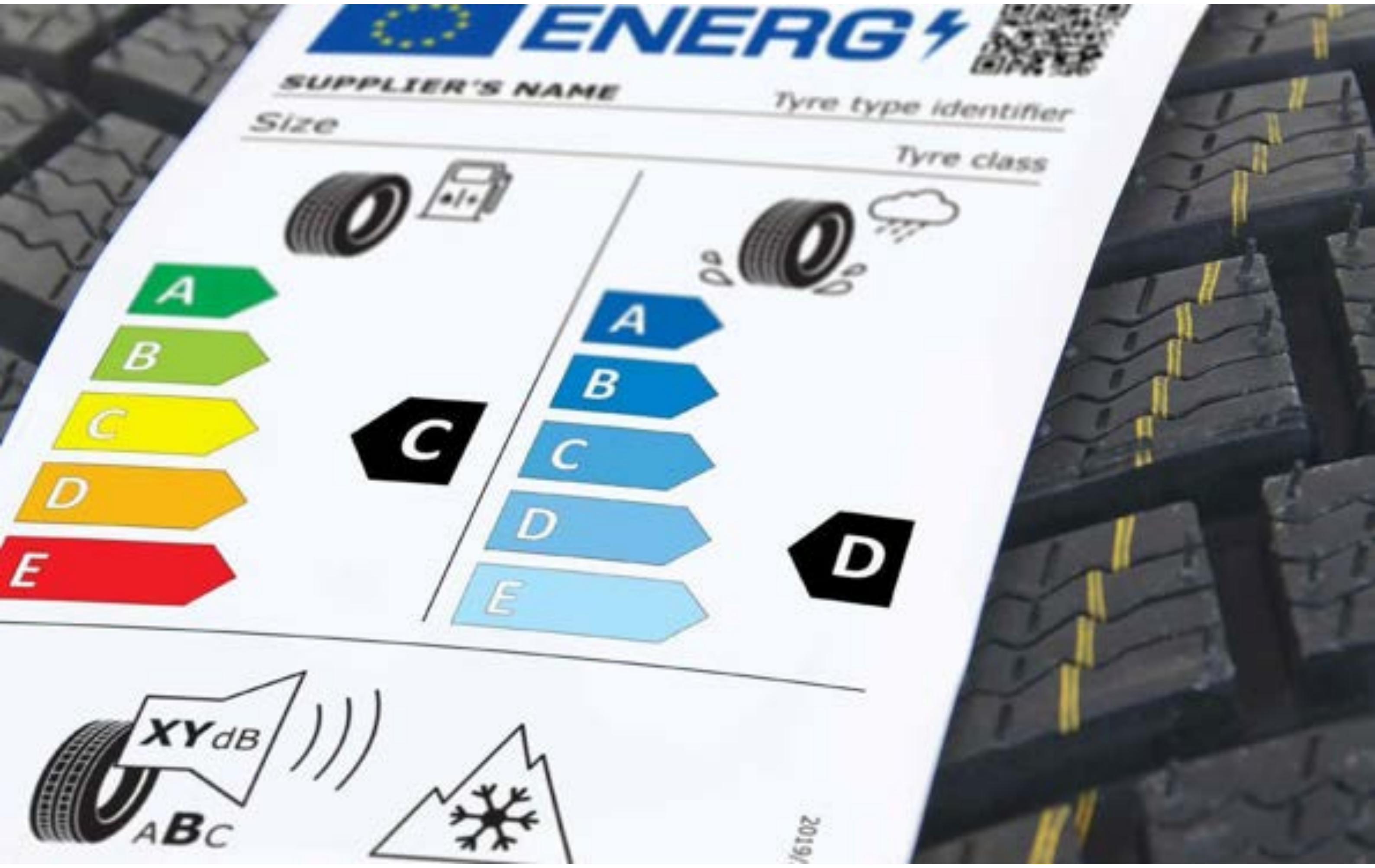

European Tyre Labelling 2012-2023

Assessing label trends

October 2025

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EC Register: ID 6025320863-10

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This report has been carried out with the support of the independent data collection by Lizeo Group.

Results are provided based on aggregated data subject to updating and non- modification.

Executive Summary

On behalf of the European Tyre and Rubber Manufacturers' Association (ETRMA) Lizeo Group, an independent Global Information Technology company focused on managing and adding value to Big Data for the Tyre Industry, conducted a first study in 2018[1] on the evolution of the European tyre market with regards to the performances indicated on the tyre label introduced in 2012.

This updated report uses 2023 market data to assess the impact of the introduction in 2021 of the EU Regulation 2020/740 in place of the EU Regulation 1222/2009. This new Regulation simplifies the labeling system and revises the performance criteria. It includes new classes (A to E) for fuel efficiency and wet grip, and specific noise levels, making it easier for consumers to make informed choices.

The study looks at the combination of Rolling Resistance and Wet Grip classes and their evolution. It applies a methodology to a million labels collected across the 28 EU Member States between 2012-2023 and looked at the evolution of the presence of different label grades combinations on the European market. In addition, data from EFTA countries such as Switzerland, and Norway were included.

The collected labels are classified into Passenger Car tyres (C1), Light Truck and Bus/Van tyres (C2) and Heavy Truck and Bus Tyres (C3). Within these categories, tyres are divided into Budget, Mid and Premium brands.

Evolution of the European tyre label

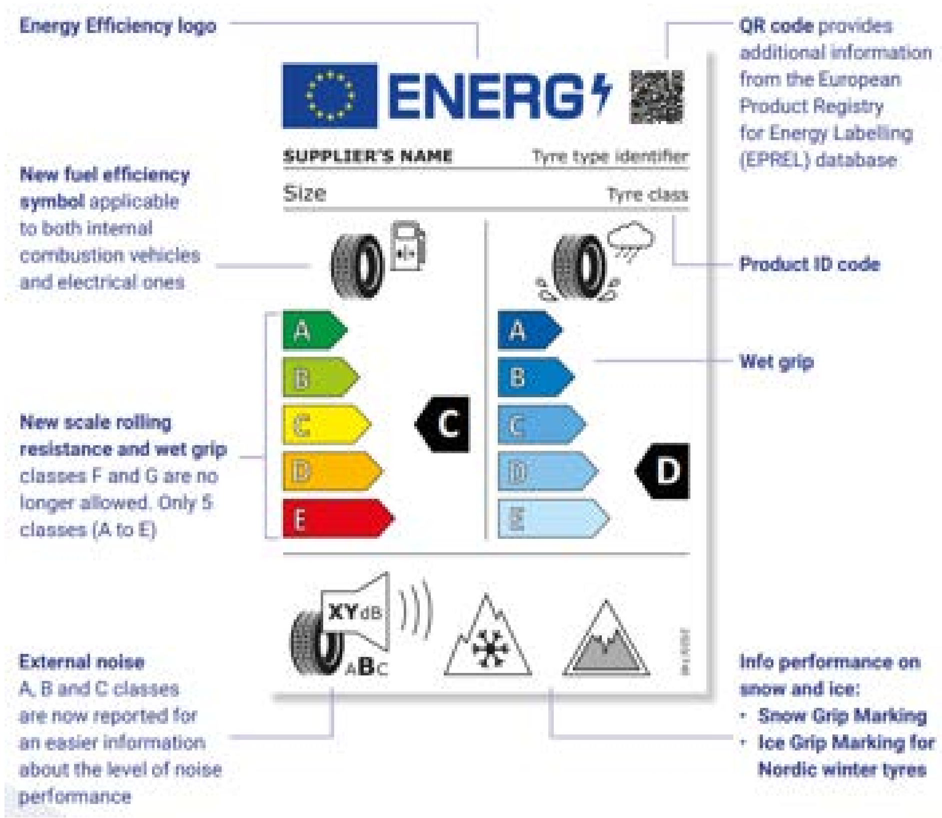
ETRMA has supported the tyre label since its inception in 2009 and has engaged in its implementation since 2012. The tyre label was originally introduced to support competition and differentiate products based on performance, providing consumers with the opportunity to make informed decisions.

The current European Tyre Label Regulation (2020/740) consists of **three performance indicators**:

- **Rolling resistance**: this performance depends on the ability of the tyre to improve the vehicle's fuel efficiency and lower its CO_2 emissions.
- **Wet grip**: tyres with a shorter braking distance on wet roads are awarded a better wet grip class. This performance is a safety indicator.
- Noise: external vehicle road noise levels with a value expressed in decibels.

In addition to these indicators, two performances are shown:
- **Snow grip**: A tyre which satisfies a minimum snow grip performance shall be classified as tyre for use in severe snow conditions and the "three-peak mountain snowflake symbol" (the so called "3PMSF") shall be included in the label.
- **Ice grip**: A tyre which satisfies a minimum ice grip performance shall be classified as ice grip tyre and the "Ice Grip symbol" (a symbol showing an ice stalagmite) shall be included on the label.

[1] Results are provided on the basis of aggregated data subject to updating and non-modification. All graphs and data are property of Lizeo Group



Key findings of the analysis

- Between 2013 and 2023, the **Budget products segment increased year on year.**

Tier Segment Share									
Brands Tier	**C1 products**			**C2 products**			**C3 products**		
	2013	***2019***	***2023***	***2013***	***2019***	***2023***	***2013***	***2019***	***2023***
Budget	43.2%	55.3%	56.4%	52.3%	67.0%	70,7%	22.5%	42.9%	43.2%
Medium	25.5%	20.2%	19.3%	24.8%	18.2%	17.4%	27.8%	24.9%	26.4%
Premium	31.3%	24.5%	24.3%	22.9%	14.2%	11.9%	49.7%	32.2%	30.4%

- In 2023, the most common tyre label within the three categories of tyre was **"D" for Rolling Resistance and "C" for Wet Grip.**

- **Most efforts on improving fuel efficiency and wet grip performance were carried out by Premium brands in all segments.**

C1	Budget	Medium	Premium
A-A	0,03%	0,50%	1,94%
A-B	0,02%	0,51%	4,83%
A-C	0,01%	0,07%	0,36%
A-D	0,00%	0,03%	0,02%
A-E	0,00%	0,02%	0,00%
B-A	0,35%	2,14%	7,09%
B-B	2,27%	1,98%	7,21%
B-C	0,95%	0,59%	1,42%
B-D	0,19%	0,76%	0,60%
B-E	0,04%	0,73%	0,56%
C-A	2,45%	14,53%	13,56%
C-B	17,79%	16,94%	15,94%
C-C	17,81%	9,54%	7,93%
C-D	3,30%	1,37%	1,82%
C-E	0,42%	1,29%	1,00%
D-A	1,07%	6,27%	5,51%
D-B	10,62%	12,79%	10,65%
D-C	27,08%	10,48%	8,62%
D-D	6,89%	3,59%	2,14%
D-E	0,81%	2,35%	0,34%
E-A	0,03%	0,50%	0,91%
E-B	0,69%	3,46%	2,45%
E-C	4,21%	6,47%	2,78%
E-D	1,90%	0,85%	0,58%
E-E	1,05%	2,27%	1,75%

C2	Budget	Medium	Premium
A-A	0,06%	0,00%	3,11%
A-B	0,01%	0,06%	0,08%
A-C	0,00%	0,00%	0,00%
A-D	0,00%	0,00%	0,00%
A-E	0,00%	0,00%	0,00%
B-A	0,33%	1,16%	11,61%
B-B	0,23%	0,46%	7,06%
B-C	0,01%	0,12%	0,59%
B-D	0,06%	0,12%	0,25%
B-E	0,00%	0,00%	0,00%
C-A	7,14%	11,48%	13,29%
C-B	15,80%	22,43%	22,29%
C-C	16,43%	5,22%	5,13%
C-D	1,35%	3,88%	0,42%
C-E	0,17%	0,17%	0,25%
D-A	2,77%	3,83%	2,19%
D-B	12,57%	13,62%	11,35%
D-C	30,12%	15,36%	10,93%
D-D	6,10%	3,94%	1,51%
D-E	0,01%	0,00%	0,00%
E-A	0,20%	0,29%	0,25%
E-B	2,16%	5,74%	3,11%
E-C	3,95%	6,26%	5,13%
E-D	0,40%	4,00%	0,76%
E-E	0,14%	1,86%	0,67%

C3	Budget	Medium	Premium
A-A	0,00%	0,00%	0,14%
A-B	0,11%	0,16%	1,66%
A-C	0,11%	0,48%	1,04%
A-D	0,06%	0,00%	0,00%
A-E	0,00%	0,00%	0,00%
B-A	0,11%	0,00%	1,32%
B-B	1,22%	3,82%	8,32%
B-C	0,66%	2,15%	2,15%
B-D	0,17%	0,00%	0,14%
B-E	0,06%	0,00%	0,00%
C-A	1,33%	1,03%	1,66%
C-B	11,23%	16,31%	22,18%
C-C	12,22%	14,48%	11,43%
C-D	2,16%	0,40%	0,49%
C-E	0,06%	0,00%	0,00%
D-A	2,16%	0,80%	1,32%
D-B	19,75%	17,98%	16,56%
D-C	32,19%	30,79%	23,01%
D-D	5,03%	1,83%	1,73%
D-E	0,06%	0,08%	0,00%
E-A	0,17%	0,00%	0,14%
E-B	4,81%	1,83%	1,52%
E-C	5,92%	6,92%	4,30%
E-D	0,44%	0,95%	0,83%
E-E	0,00%	0,00%	0,07%

- Taking into consideration both Energy efficiency and Wet Grip performance, **the rate of A/A, A/B, B/A and B/B (RR/Wet) remains low (<10% for all categories).**
- Energy efficiency is progressing for C1, C2, C3 but **the rate of A and B tyres in Rolling Resistance (RR) remains limited in 2023:**

Rate of A and B tyres in Rolling Resistance (RR)			
Products	**C1**	**C2**	**C3**
2020	<6%	<3%	<7%
2023	<10%	<5%	<15%

- Since the tyre labelling has been introduced in 2012, for all categories, **the rate of A tyres on noise performance appears very stable year after year.**

What has changed since the 2018 report?

▶ Methodology

- No change in the method to get label values for each category.
- Direct year on year comparisons need to be made carefully because the rating scale changed in 2021.
- The label scale of the study is based on the Regulation (EU) 2020/740.
- All Regulation (EU)1222/2009 label values have been rescaled.
- Rolling Resistance, Wet Grip and Noise label values are analysed on all the periods.

▶ Scope

- Regulation (EU) 2020/740 includes 3PMSF" symbol (i.e. "three-peak mountain snowflake symbol") and the "Ice Grip symbol".

▶ Label values evolution

- Regulation (EU) 2020/740 includes 3PMSF" symbol (i.e. "three-peak mountain snowflake symbol") and the "Ice Grip symbol". Most popular value for Rolling Resistance and Wet Grip remains the same D – C.
- Higher shares of A/B classes especially for C1 and C2 products. The share for Premium brands of A/B classes significantly above the average:
  - C1: 21.1% of the Label values in 2023
  - C2: 21.9% of the Label values in 2023
  - C3: 11.4% of the Label values in 2023
- Noise "A" ratings are rare (<10%) and largely unchanged.

Conclusions

Budget brands, which continue to represent the most popular and fastest-growing segment of the market, lag significantly in achieving high-performance labels. This limits a clearer market transformation towards improved tyre performances, even though both fuel consumption (Rolling Resistance) and Wet Grip have shown positive trends, particularly among premium and mid-tier brands.

Despite this progress, the study indicates that the current tyre labelling scheme for C1, C2 and C3 tyres remains relevant as a framework to assess performance, but its impact on market transformation appears limited, as budget tyres with lower-performing labels continue to dominate the market.

Consumer support measures are necessary in order to incentivise the market uptake of best performing tyres.

Criteria for the study

More than 1 000 000 label data collected by Lizeo have been analysed. The key criterion followed for the study is that both fuel consumption label and wet grip label have been analysed jointly.

From 2012 to 2020, the label data is based on the Regulation (EC) 1222/2009. In 2021, the introduction of tyres having label values based on the Regulation (EU) 2020/740 starts. From 2021 to 2023, we see a clear transition from between the 2 regulations on the products visible on the market.

It is also important to mention that the new regulation is also including 2 new type of label attributes with the so called “3PMSF” symbol (i.e. “three-peak mountain snowflake symbol”) and the “Ice Grip symbol” (a symbol showing an ice stalagmite, named ICE symbol from now on).

As we wanted to analyse the Label data seen by consumers, we have collected from dealers’ websites and for each tyre i.e. each Stock Keeping Unit (SKU) of each brand we have selected Most Observed values (MOBS) label data for each tyre[2].

Due to the change of scale of values in the 2 regulations, we have applied the following transformation on the data:

Rolling Resistance & Wet Grip

Regulation (EC) 1222/2009	A	B	C	E	F + G
Regulation (EU) 2020/740	A	B	C	D	E
Study	A	B	C	D	E

Noise

Regulation (EC) 1222/2009	1	2	3
Regulation (EU) 2020/740	A	B	C
Study	A	B	C

Lizeo brand segmentation used, for the study, is based on:

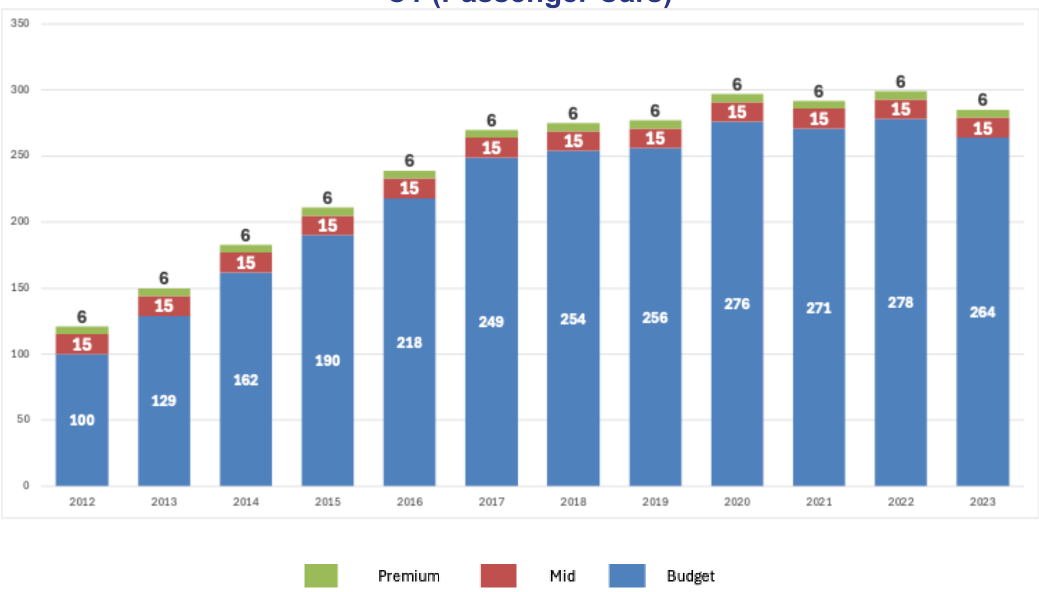
- Technical criteria: OE homologations, technologies available (Runflat, EV,…);
- Market criteria: Car park coverage, range of dimensions;
- Support to customer criteria: EU support/country support level, information localisation.

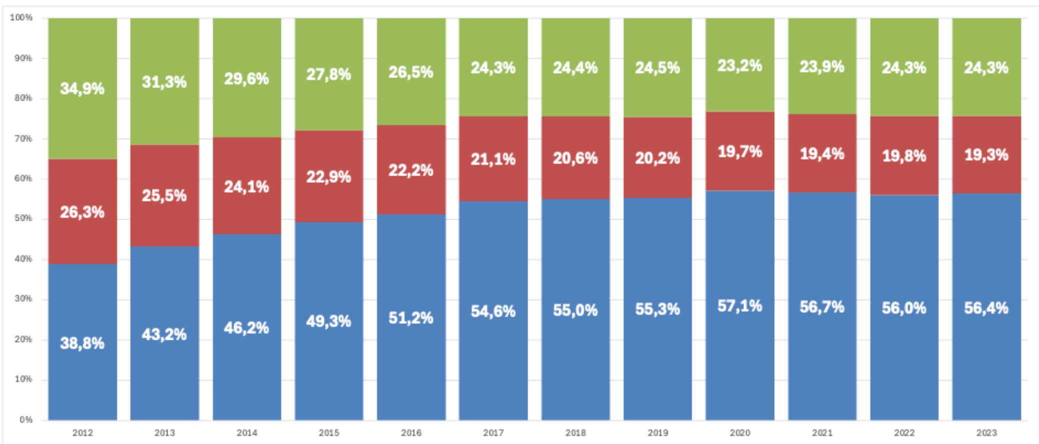
[2] MOBS label data: from the data we collect every day, we count the number of label data per certified tyre. The MOBS value is label data with the highest number of occurrences.
Note: A tyre is defined by a brand, a pattern and a dimension

Brands included in the study

The number of brands and the share of label data for C1 (Passenger Car tyres), C2 (Light Truck and Bus Tyres) and C3 (Heavy Truck & Bus Tyres) tyre classes is shown below:

C1 (Passenger Cars)

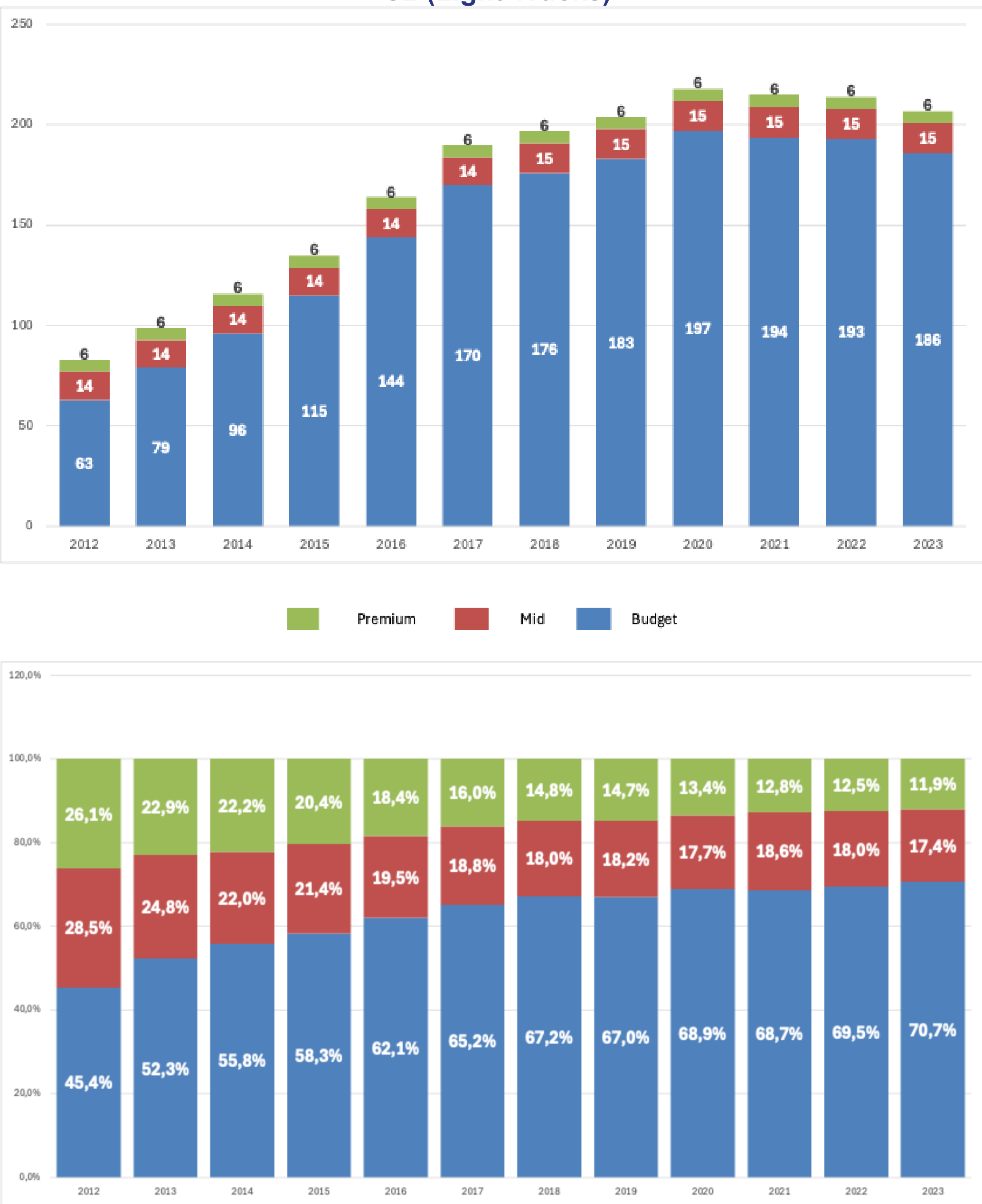




In 2023, the 264 Budget brands represent 56,4% of the label data included in the study. In average, the number of label data visible per Brand is:

- Premium brands: 4 033
- Mid Brands: 1281
- Budget Brands: 212

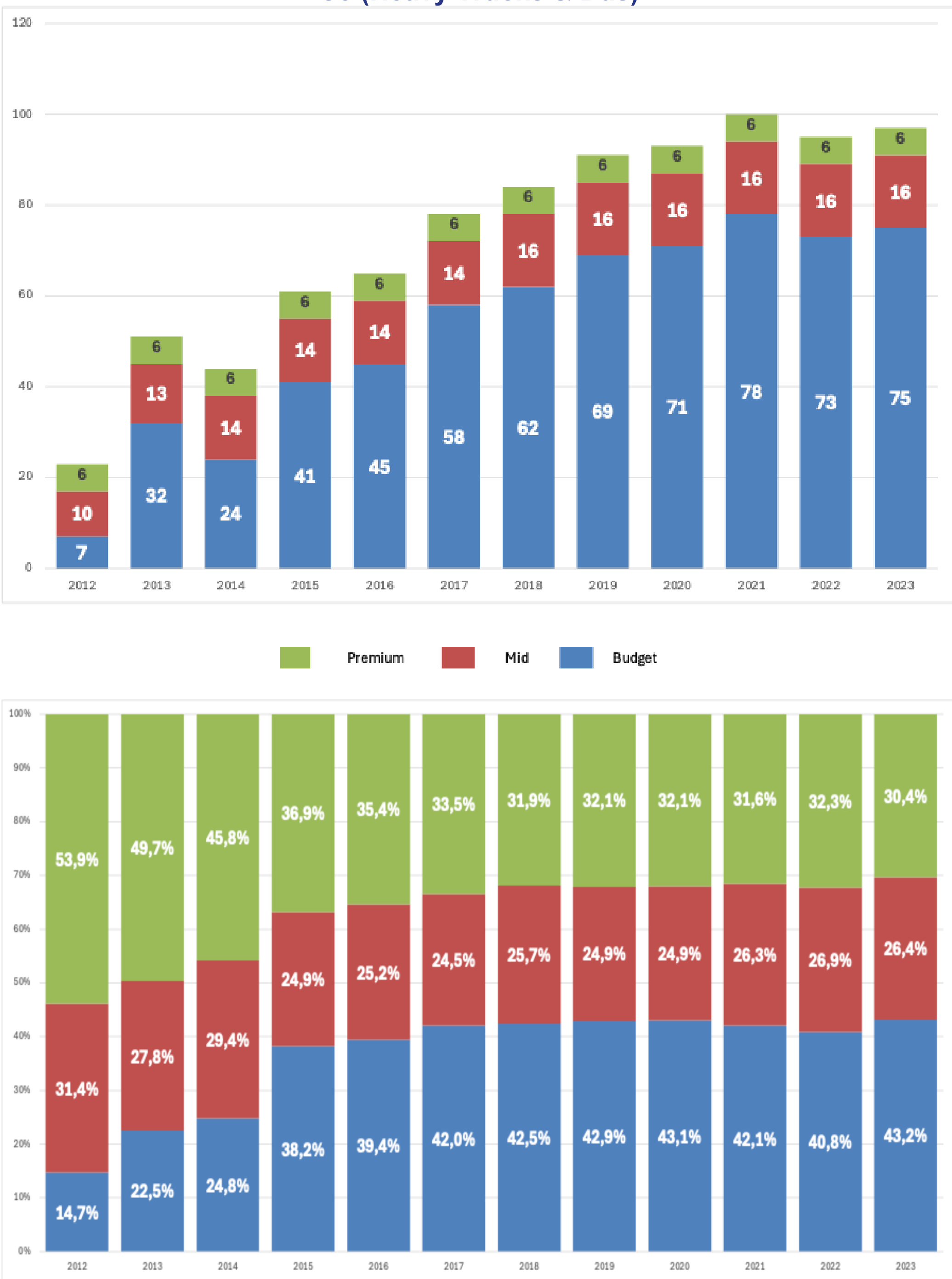
C2 (Light Trucks)



In C2 category, the share of label data for the 186 Budget brands is 70,7%. In average, the number of label data visible per Brand:

- Premium brands: 199
- Mid Brands: 115
- Budget Brands: 38

C3 (Heavy Trucks & Bus)



The C3 category also includes more label data for Budget brands. In average, the number of label data visible per Brand:

- Premium brands: 246
- Mid Brands: 80
- Budget Brands: 28

The data set for the label data is composed as follows:

		2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Grand Total
C1		**27377**	**38715**	**46340**	**55698**	**66578**	**76488**	**86098**	**92066**	**103440**	**104622**	**104081**	**99510**	**901013**
	Budget	10633	16735	21432	27468	34113	41727	47354	50951	59110	59302	58236	56099	483160
	Mid	7193	9854	11181	12740	14805	16147	17715	18590	20383	20330	20574	19213	188725
	Premium	9551	12126	13727	15490	17660	18614	21029	22525	23947	24990	25271	24198	229128
C2		**2398**	**3399**	**4107**	**4820**	**5867**	**7017**	**7989**	**8538**	**9766**	**9897**	**10204**	**9971**	**83973**
	Budget	1089	1777	2292	2808	3642	4574	5371	5722	6727	6796	7091	7049	54938
	Mid	683	842	904	1030	1144	1317	1437	1558	1729	1837	1836	1731	16048
	Premium	626	780	911	982	1081	1126	1181	1258	1310	1264	1277	1191	12987
C3		**1533**	**2673**	**2541**	**3533**	**3894**	**4415**	**4692**	**4915**	**5062**	**5193**	**4831**	**4856**	**48138**
	Budget	225	601	630	1350	1535	1856	1992	2110	2180	2186	1973	2097	18735
	Mid	482	744	748	881	980	1081	1204	1225	1259	1367	1299	1283	12553
	Premium	826	1328	1163	1302	1379	1478	1496	1580	1623	1640	1559	1476	16850
Grand Total		***31308***	***44787***	***52988***	***64051***	***76339***	***87920***	***98779***	***105519***	***118268***	***119712***	***119116***	***114337***	***1033124***

A clearly visible element from the table is how the budget segment increased until 2020, with a rate much higher than Premium/Mid brands.

Regulation (EC) 1222/2009

		2021	2022	2023	Grand Total
C1		**28299**	**18312**	**10107**	**56718**
	Budget	18378	11981	6380	36739
	Mid	5064	3375	2130	10569
	Premium	4857	2956	1597	9410
C2		**2340**	**1556**	**816**	**4712**
	Budget	1738	1152	574	3464
	Mid	340	219	157	716
	Premium	262	185	85	532
C3		**2477**	**2120**	**2005**	**6602**
	Budget	1357	1104	1075	3536
	Mid	520	485	435	1440
	Premium	600	531	495	1626
Grand Total		***33116***	***21988***	***12928***	***68032***

Regulation (EU) 2020/740

		2021	2022	2023	Grand Total
C1		**76323**	**85769**	**89403**	**251495**
	Budget	40924	46255	49719	136898
	Mid	15266	17199	17083	49548
	Premiun	20133	22315	22601	65049
C2		**7557**	**8648**	**9155**	**25360**
	Budget	5058	5939	6475	17472
	Mid	1497	1617	1574	4688
	Premiun	1002	1092	1106	3200
C3		**2716**	**2711**	**2851**	**8278**
	Budget	829	869	1022	2720
	Mid	847	814	848	2509
	Premiun	1040	1028	981	3049
Grand Total		***86596***	***97128***	***101409***	***285133***

The analysis of the number of Label data shows a clear market transformation to the Regulation (EU) 2020/740.

Analysis

As an update to the study published in 2021, the analysis is performed looking at both performances together: Fuel Consumption (Rolling Resistance) and Wet Grip.

To see the evolution, we are comparing the label data in 2017, 2020 (publication of the new regulation) and 2023 for C1 (Passenger Cars), C2 (Light Trucks) and C3 (Heavy Trucks & Bus) categories.

C1 (Passenger Cars)

The market in 2017

The most popular car tyre label in 2017 was "D" for Fuel Consumption and "C" for Wet Grip (*).

2017		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,1%	0,7%	3,7%	2,6%	0,7%	7,8%
	B	0,1%	1,3%	8,4%	10,9%	3,2%	24,0%
	C	0,0%	0,6%	11,1%	26,4%	9,6%	47,8%
	D	0,0%	0,1%	2,7%	8,8%	4,2%	15,7%
	E	0,0%	0,1%	0,9%	2,2%	1,4%	4,7%
Total		0,2%	2,9%	26,8%	50,9%	19,2%	100,0%

The market in 2020

The most popular car tyre label in 2020 is still "D" for Fuel Consumption and "C" for Wet Grip; but we can also observe more Label data for the "A", "B" or "C" values and less for "D" and "E".

2020		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,3%	1,4%	5,5%	3,0%	0,3%	10,4%
	B	0,6%	1,8%	12,3%	12,0%	1,8%	28,5%
	C	0,1%	0,8%	12,7%	24,9%	5,9%	44,4%
	D	0,0%	0,3%	2,5%	7,7%	2,5%	12,9%
	E	0,0%	0,3%	0,8%	1,6%	1,1%	3,7%
Total		1,0%	4,4%	33,7%	49,2%	11,6%	100,0%

(*) As a reminder, we have applied a data transformation to compare Regulation (EC) 1222/2009 and Regulation (EU) 2020/740.

The Label data values EU Regulation 1222/2009 is E for Rolling Resistance and C for Wet Grip.

The market in 2023

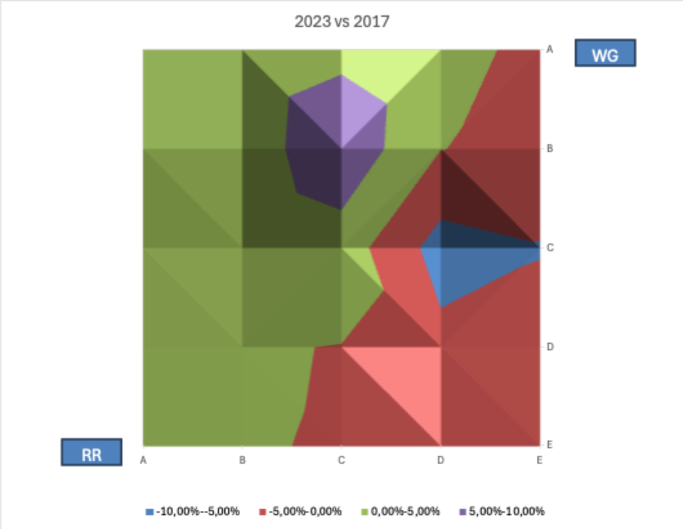
In 2023, Label data for Fuel Consumption between “C” and “D” and “B” and “C” for Wet Grip represents more than 60% of the market.

2023		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,6%	2,3%	7,5%	3,2%	0,3%	13,9%
	B	1,3%	3,4%	17,2%	11,0%	1,7%	34,6%
	C	0,1%	1,0%	13,8%	19,4%	4,3%	38,6%
	D	0,0%	0,4%	2,6%	5,1%	1,4%	9,5%
	E	0,0%	0,3%	0,7%	1,0%	1,5%	3,5%
Total		2,0%	7,4%	41,8%	39,7%	9,1%	100,0%

The full analysis is even more clear: Passenger Car tyres equal “B-B” or better are 2.2 % of the market in 2017 and are representing in 2023 7.7%

C1	2017	2018	2019	2020	2021	2022	2023
A-A	0,07%	0,15%	0,23%	0,30%	0,37%	0,47%	0,59%
A-B	0,06%	0,14%	0,37%	0,61%	0,87%	1,09%	1,29%
A-C	0,05%	0,05%	0,07%	0,08%	0,10%	0,10%	0,10%
A-D	0,00%	0,00%	0,00%	0,00%	0,00%	0,01%	0,01%
A-E	0,01%	0,02%	0,01%	0,00%	0,00%	0,00%	0,00%
B-A	0,68%	0,96%	1,18%	1,37%	1,63%	2,00%	2,33%
B-B	1,30%	1,47%	1,66%	1,75%	2,41%	2,93%	3,42%
B-C	0,61%	0,67%	0,68%	0,75%	0,84%	0,92%	1,00%
B-D	0,14%	0,20%	0,22%	0,27%	0,22%	0,33%	0,40%
B-E	0,14%	0,27%	0,24%	0,26%	0,29%	0,29%	0,30%
C-A	3,74%	4,35%	5,18%	5,47%	6,34%	6,98%	7,48%
C-B	8,45%	9,34%	10,77%	12,34%	14,06%	15,67%	17,18%
C-C	11,09%	11,78%	11,87%	12,72%	13,01%	13,36%	13,81%
C-D	2,67%	2,68%	2,46%	2,48%	1,96%	2,29%	2,57%
C-E	0,88%	0,80%	0,75%	0,76%	1,08%	0,85%	0,73%
D-A	2,61%	2,74%	2,89%	2,99%	2,86%	3,02%	3,15%
D-B	10,94%	11,00%	11,62%	12,01%	9,88%	10,77%	11,04%
D-C	26,45%	26,13%	25,35%	24,93%	18,52%	20,46%	19,39%
D-D	8,76%	8,40%	8,19%	7,67%	5,25%	5,56%	5,10%
D-E	2,18%	2,04%	1,79%	1,60%	1,36%	1,23%	0,99%
E-A	0,71%	0,63%	0,48%	0,31%	0,50%	0,42%	0,34%
E-B	3,24%	2,92%	2,41%	1,83%	3,40%	2,04%	1,65%
E-C	9,58%	8,38%	7,23%	5,94%	10,33%	5,70%	4,30%
E-D	4,16%	3,59%	3,09%	2,47%	2,05%	1,83%	1,38%
E-E	1,49%	1,31%	1,26%	1,08%	2,67%	1,70%	1,45%

Another way to visualise the market transformation: 2023 vs 2017. In the graph below it appears that in the period shown the market is improving Rolling Resistance and Wet Grip at the same time.

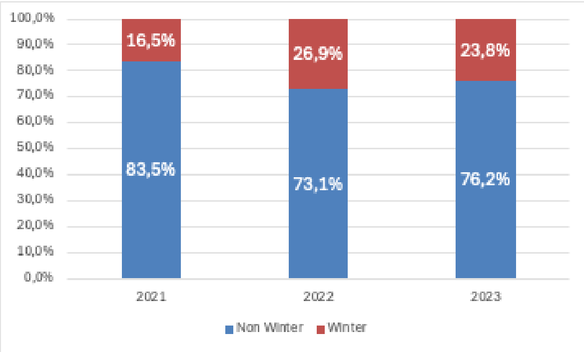


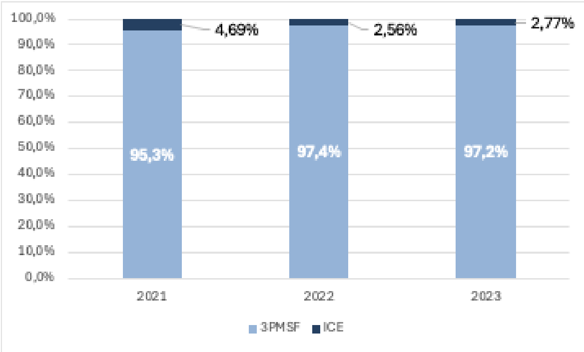
C1	Budget	Medium	Premium
A-A	0,03%	0,50%	1,94%
A-B	0,02%	0,51%	4,83%
A-C	0,01%	0,07%	0,36%
A-D	0,00%	0,03%	0,02%
A-E	0,00%	0,02%	0,00%
B-A	0,35%	2,14%	7,09%
B-B	2,27%	1,98%	7,21%
B-C	0,95%	0,59%	1,42%
B-D	0,19%	0,76%	0,60%
B-E	0,04%	0,73%	0,56%
C-A	2,45%	14,53%	13,56%
C-B	17,79%	16,94%	15,94%
C-C	17,81%	9,54%	7,93%
C-D	3,30%	1,37%	1,82%
C-E	0,42%	1,29%	1,00%
D-A	1,07%	6,27%	5,51%
D-B	10,62%	12,79%	10,65%
D-C	27,08%	10,48%	8,62%
D-D	6,89%	3,59%	2,14%
D-E	0,81%	2,35%	0,34%
E-A	0,03%	0,50%	0,91%
E-B	0,69%	3,46%	2,45%
E-C	4,21%	6,47%	2,78%
E-D	1,90%	0,85%	0,58%
E-E	1,05%	2,27%	1,75%

Looking at 80% of market values per Brands Tier in 2023 is indeed showing how premium brands have improved the tyres with label data for a “A” and “B” values to reach more than 20%, while the medium brands offer 5% and Budget less than 3%.

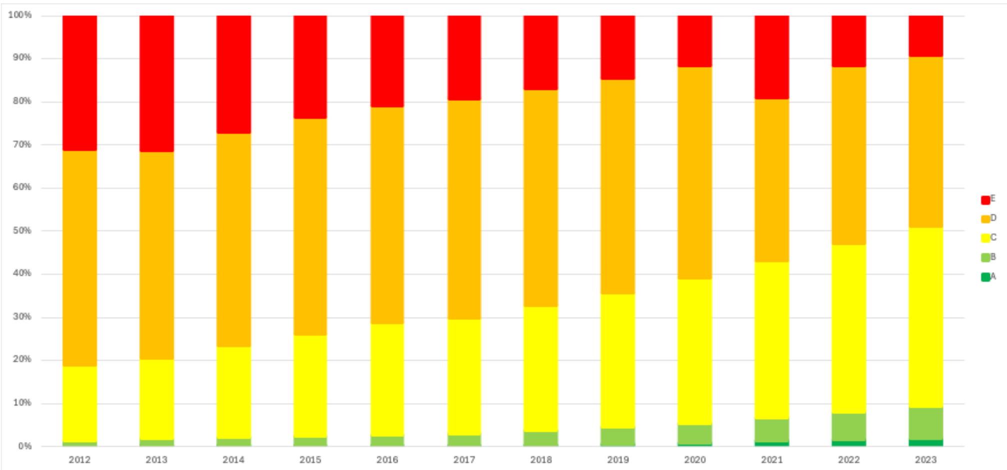
Evolution of the share of tyres with 3PMSF and ICE symbols

The share of label data for tyres with 3PMSF symbol is 23.8% in 2023. Within them, only 3% are declared tyres with ICE symbol.



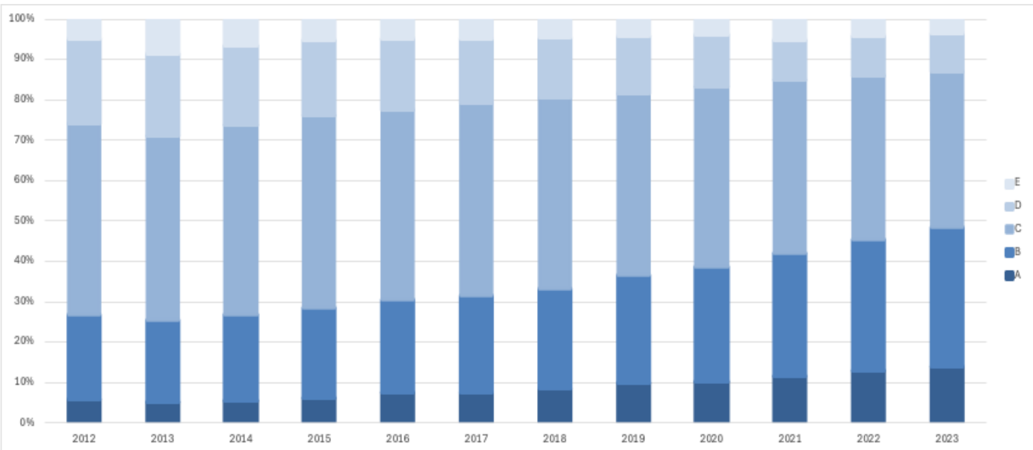


Evolution of Rolling Resistance label data



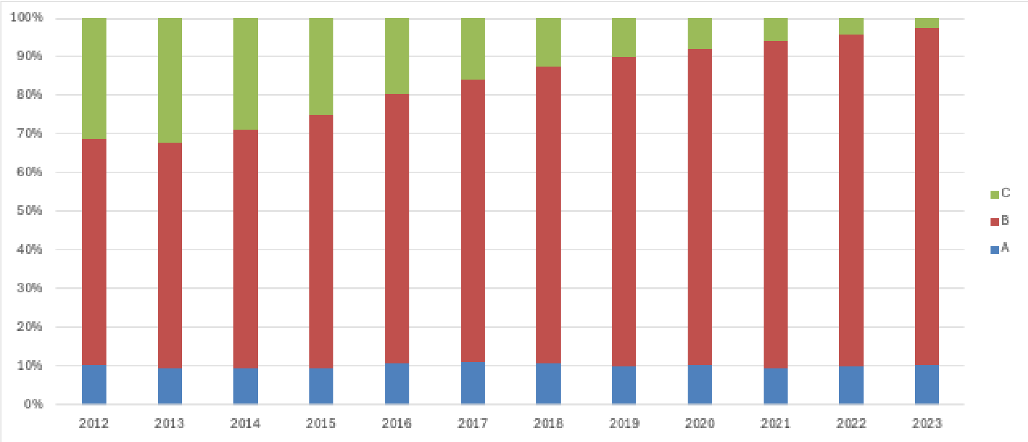
The increase of the share of the “C”, “B” and “A” values shows a trend of improvement for the Rolling Resistance, but the “D” and “E” values are still counting for 49% in 2023.

Evolution of Wet Grip label data



The Wet Grip performance has continued to increase during the period with an increase of the share of “A” and “B” values. The percentage of “D” and “E” values for Wet Grip in 2023 is less than 13%.

<u>Evolution of Noise label data</u>



Since the tyre labelling has been introduced in 2012, we can observe that the share of “A” values is stable and below 10%., showing no pull from the consumers.

C2 (Light Trucks)

The market in 2017

The most popular car tyre label in 2017 was “D” for Fuel Consumption and “C” for Wet Grip (*).

2017		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,0%	0,6%	3,4%	2,3%	0,8%	7,1%
	B	0,0%	1,0%	7,7%	9,1%	4,8%	22,6%
	C	0,0%	0,1%	8,6%	36,7%	7,6%	53,0%
	D	0,0%	0,3%	4,2%	7,7%	4,3%	16,5%
	E	0,0%	0,0%	0,1%	0,4%	0,2%	0,7%
Total		0,0%	2,0%	24,1%	56,2%	17,7%	100,0%

The market in 2020

The most popular car tyre label in 2020 is still “D” for Fuel Consumption and “C” for Wet Grip.

2020		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,3%	1,0%	7,0%	2,4%	0,6%	11,4%
	B	0,1%	0,7%	10,7%	12,0%	3,2%	26,7%
	C	0,1%	0,1%	9,5%	34,1%	4,8%	48,7%
	D	0,0%	0,3%	2,9%	6,8%	2,8%	12,9%
	E	0,0%	0,0%	0,1%	0,1%	0,1%	0,4%
Total		0,5%	2,1%	30,3%	55,5%	11,6%	100,0%

The market in 2023

In 2023, the most popular label data for Fuel Consumption remains “D” and “C” for Wet Grip; but we can observe a trend of increasing number of “B” and “C” data for Rolling Resistance and “A” and “B” values for Wet Grip.

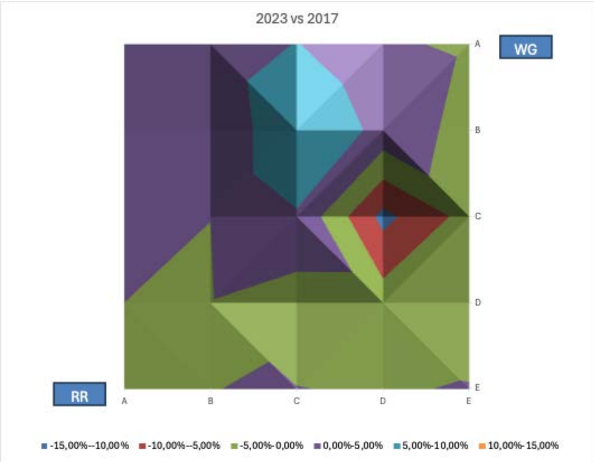
2023		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,4%	1,8%	8,6%	2,9%	0,2%	14,0%
	B	0,0%	1,1%	17,7%	12,6%	2,9%	34,3%
	C	0,0%	0,1%	13,1%	25,3%	4,5%	43,0%
	D	0,0%	0,1%	1,7%	5,2%	1,1%	8,0%
	E	0,0%	0,0%	0,2%	0,0%	0,5%	0,7%
Total		0,4%	3,1%	41,3%	46,0%	9,2%	100,0%

(*) As a reminder, we have applied a data transformation to compare Regulation (EC) 1222/2009 and Regulation (EU) 2020/740. The Label data values EU Regulation 1222/2009 is E for Rolling Resistance and C for Wet Grip.

The full analysis is even more clear: van tyres equal “B-B” or better are 1.6 % of the market in 2017 and are representing, in 2023, 3.3%.

C2	2017	2018	2019	2020	2021	2022	2023
A-A	0,00%	0,06%	0,20%	0,28%	0,36%	0,31%	0,41%
A-B	0,00%	0,00%	0,01%	0,05%	0,01%	0,03%	0,03%
A-C	0,00%	0,03%	0,01%	0,13%	0,01%	0,02%	0,00%
A-D	0,00%	0,01%	0,02%	0,02%	0,01%	0,00%	0,00%
A-E	0,00%	0,01%	0,01%	0,00%	0,00%	0,00%	0,00%
B-A	0,58%	0,72%	0,75%	1,02%	1,08%	1,27%	1,82%
B-B	1,04%	0,93%	0,78%	0,69%	0,77%	0,95%	1,08%
B-C	0,09%	0,11%	0,13%	0,09%	0,11%	0,20%	0,10%
B-D	0,29%	0,58%	0,51%	0,30%	0,21%	0,20%	0,09%
B-E	0,01%	0,01%	0,02%	0,03%	0,04%	0,01%	0,00%
C-A	3,42%	5,20%	6,27%	7,05%	7,75%	8,26%	8,62%
C-B	7,69%	8,81%	9,89%	10,75%	13,98%	16,10%	17,72%
C-C	8,65%	8,10%	8,07%	9,49%	10,24%	11,41%	13,14%
C-D	4,21%	3,53%	2,76%	2,91%	1,85%	2,05%	1,68%
C-E	0,09%	0,24%	0,27%	0,14%	0,75%	0,31%	0,18%
D-A	2,30%	2,59%	2,54%	2,45%	2,58%	2,63%	2,88%
D-B	9,11%	9,83%	11,57%	11,97%	10,26%	12,25%	12,61%
D-C	36,74%	35,87%	34,53%	34,14%	23,13%	26,49%	25,27%
D-D	7,68%	7,67%	7,29%	6,81%	4,76%	5,75%	5,18%
D-E	0,39%	0,29%	0,19%	0,12%	0,13%	0,07%	0,01%
E-A	0,83%	0,70%	0,68%	0,62%	0,95%	0,53%	0,22%
E-B	4,79%	4,35%	4,12%	3,22%	4,83%	3,11%	2,89%
E-C	7,57%	6,77%	6,03%	4,82%	12,12%	5,57%	4,49%
E-D	4,30%	3,41%	3,21%	2,83%	2,34%	2,01%	1,06%
E-E	0,22%	0,16%	0,13%	0,06%	1,74%	0,46%	0,50%

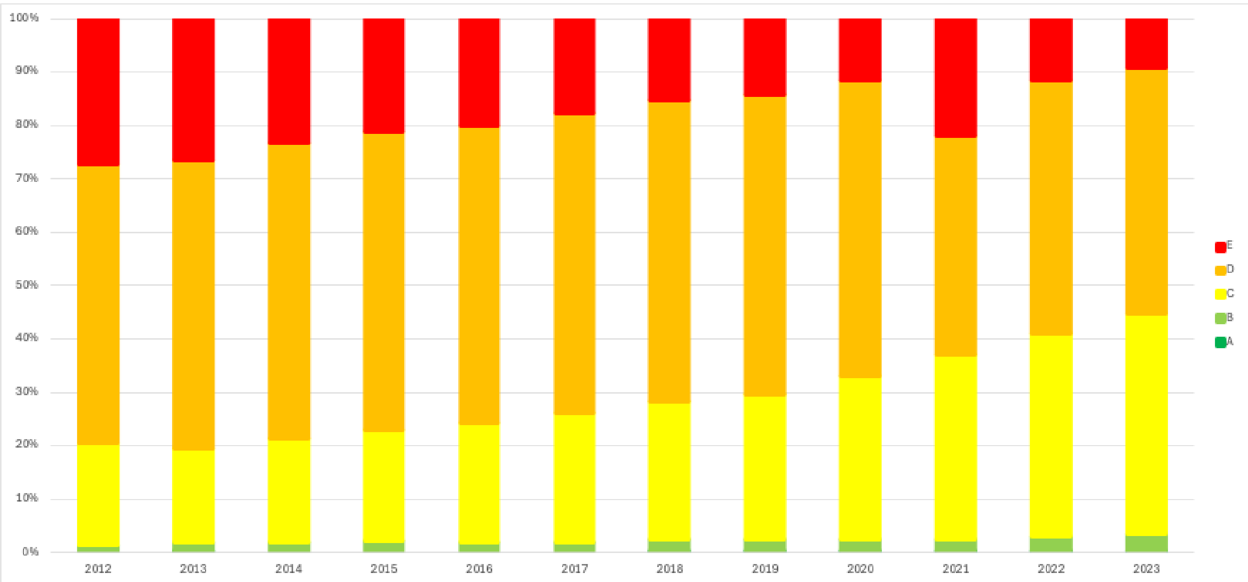
Another way to visualise the market transformation: 2023 vs 2017. In the graph below it appears that in the period shown the market is improving Rolling resistance and Wet Grip at the same time.



Looking at the market values per Brands Tier in 2023 is indeed showing how premium brands have improved the tyres with label data for a "A" and "B" values to reach 21.9%, while the medium brands offer 1.7% and Budget less than 0.6%.

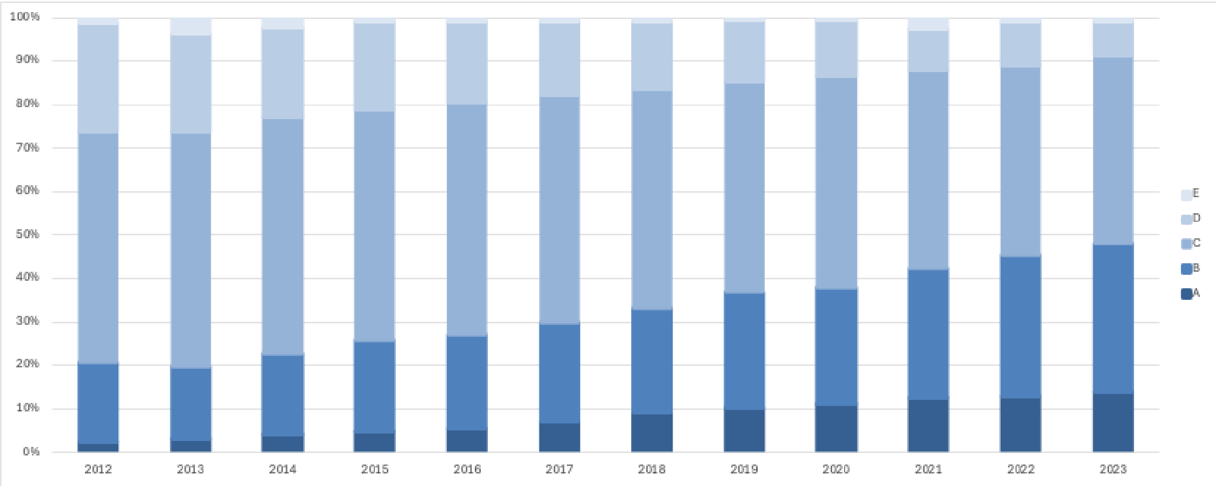
C2	Budget	Medium	Premium
A-A	0,06%	0,00%	3,11%
A-B	0,01%	0,06%	0,08%
A-C	0,00%	0,00%	0,00%
A-D	0,00%	0,00%	0,00%
A-E	0,00%	0,00%	0,00%
B-A	0,33%	1,16%	11,61%
B-B	0,23%	0,46%	7,06%
B-C	0,01%	0,12%	0,59%
B-D	0,06%	0,12%	0,25%
B-E	0,00%	0,00%	0,00%
C-A	7,14%	11,48%	13,29%
C-B	15,80%	22,43%	22,29%
C-C	16,43%	5,22%	5,13%
C-D	1,35%	3,88%	0,42%
C-E	0,17%	0,17%	0,25%
D-A	2,77%	3,83%	2,19%
D-B	12,57%	13,62%	11,35%
D-C	30,12%	15,36%	10,93%
D-D	6,10%	3,94%	1,51%
D-E	0,01%	0,00%	0,00%
E-A	0,20%	0,29%	0,25%
E-B	2,16%	5,74%	3,11%
E-C	3,95%	6,26%	5,13%
E-D	0,40%	4,00%	0,76%
E-E	0,14%	1,86%	0,67%

Evolution of Rolling Resistance label data



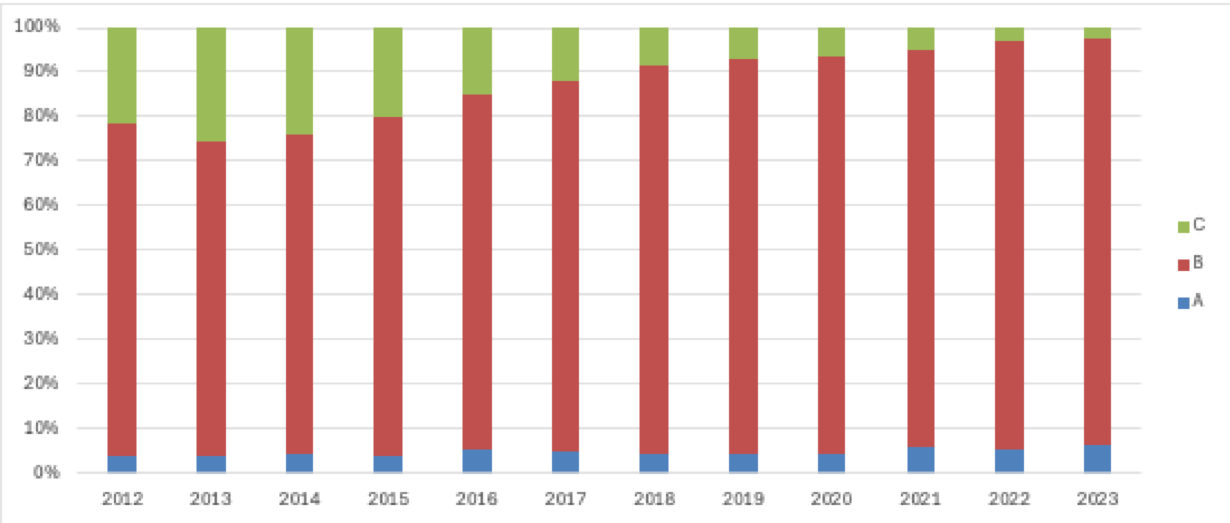
The increase of the share of the "C values, shows a trend of improvement for the Rolling Resistance, but the "D" and "E" values are still counting for 55% of the total in 2023.

Evolution of Wet Grip label data



The Wet Grip performance has continued to increase during the period with a share of "A" and "B" values reaching almost 50% in 2023. The percentage of "D" and "E" values for Wet Grip in 2023 is less than 10%.

Evolution of Noise label data



Since the tyre labelling has been introduced in 2012, we can observe that the share of "A" values is stable and less than 10%.

C3 (Heavy Trucks & Bus)

The market in 2017

The most popular car tyre label in 2017 was “D” for Fuel Consumption and “C” for Wet Grip (*).

2017		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,0%	0,3%	1,2%	1,0%	0,1%	2,7%
	B	0,1%	2,5%	13,0%	19,1%	0,7%	35,5%
	C	0,2%	1,2%	12,4%	35,9%	2,7%	52,5%
	D	0,0%	0,2%	4,2%	4,3%	0,5%	9,2%
	E	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%
Total		0,4%	4,3%	30,9%	60,4%	4,0%	100,0%

The market in 2020

The most popular car tyre label in 2020 is still “D” for Fuel Consumption and “C” for Wet Grip and the share of the total market is very close to 2017.

2020		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,0%	0,5%	1,4%	1,6%	0,0%	3,6%
	B	0,4%	3,3%	15,3%	20,8%	0,7%	40,6%
	C	0,3%	1,5%	12,5%	33,8%	1,6%	49,8%
	D	0,0%	0,4%	1,7%	3,4%	0,5%	6,0%
	E	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Total		0,8%	5,7%	31,0%	59,6%	2,9%	100,0%

The market in 2023

In 2023, the most popular label data for Fuel Consumption remains again “D” and “C” for Wet Grip. The market transformation seems to be slower for C3 than other categories.

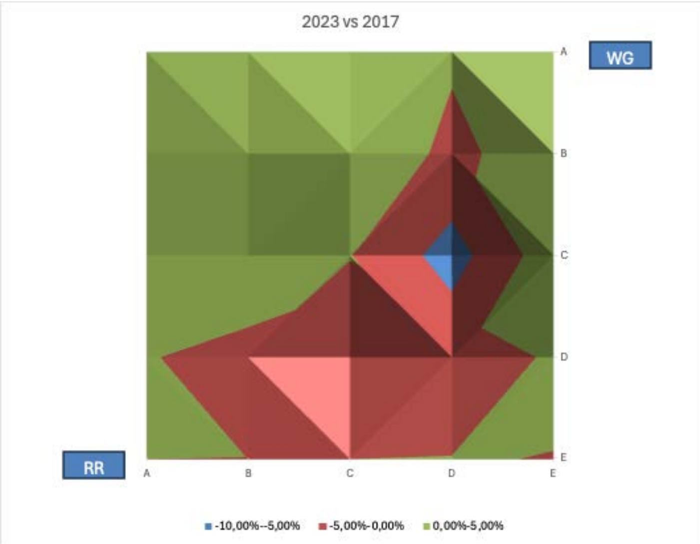
2023		Rolling Resistance					Total
		A	B	C	D	E	
Wet Grip	A	0,0%	0,5%	1,4%	1,5%	0,1%	3,5%
	B	0,6%	4,2%	16,1%	18,2%	2,9%	42,1%
	C	0,5%	1,6%	12,6%	28,9%	5,7%	49,2%
	D	0,0%	0,1%	1,1%	3,1%	0,7%	5,1%
	E	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%
Total		1,2%	6,4%	31,3%	51,7%	9,4%	100,0%

(*) As a reminder, we have applied a data transformation to compare Regulation (EC) 1222/2009 and Regulation (EU) 2020/740. The Label data values EU Regulation 1222/2009 is E for Rolling Resistance and C for Wet Grip.

The full analysis is even more clear: truck tyres equal “B-B” or better are 3.0 % of the market in 2017 and are representing in 2023 5.3%

C3	2017	2018	2019	2020	2021	2022	2023
A-A	0,05%	0,04%	0,04%	0,04%	0,04%	0,04%	0,04%
A-B	0,14%	0,28%	0,39%	0,38%	0,37%	0,40%	0,62%
A-C	0,20%	0,28%	0,30%	0,34%	0,35%	0,45%	0,51%
A-D	0,00%	0,00%	0,02%	0,02%	0,00%	0,00%	0,02%
A-E	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
B-A	0,32%	0,30%	0,45%	0,49%	0,43%	0,42%	0,47%
B-B	2,49%	2,73%	3,12%	3,33%	3,69%	4,08%	4,21%
B-C	1,22%	1,28%	1,41%	1,50%	1,77%	1,70%	1,55%
B-D	0,25%	0,26%	0,28%	0,42%	0,21%	0,13%	0,11%
B-E	0,02%	0,00%	0,00%	0,00%	0,00%	0,00%	0,02%
C-A	1,22%	1,36%	1,41%	1,41%	1,28%	1,34%	1,35%
C-B	13,01%	14,63%	15,12%	15,34%	15,78%	16,04%	16,15%
C-C	12,44%	12,07%	12,22%	12,49%	12,65%	12,07%	12,60%
C-D	4,19%	3,69%	2,36%	1,71%	1,40%	1,16%	1,13%
C-E	0,02%	0,00%	0,00%	0,02%	0,04%	0,00%	0,02%
D-A	1,00%	1,15%	1,45%	1,58%	1,32%	1,49%	1,51%
D-B	19,15%	20,23%	21,12%	20,85%	18,70%	18,92%	18,23%
D-C	35,94%	34,43%	33,80%	33,83%	28,55%	29,15%	28,86%
D-D	4,31%	4,22%	3,64%	3,36%	3,13%	2,88%	3,08%
D-E	0,00%	0,00%	0,00%	0,00%	0,02%	0,04%	0,04%
E-A	0,09%	0,09%	0,04%	0,04%	0,14%	0,16%	0,11%
E-B	0,75%	0,68%	0,76%	0,72%	3,11%	2,97%	2,93%
E-C	2,70%	1,79%	1,62%	1,62%	6,28%	5,84%	5,68%
E-D	0,45%	0,49%	0,43%	0,49%	0,72%	0,69%	0,71%
E-E	0,05%	0,00%	0,00%	0,02%	0,02%	0,02%	0,02%

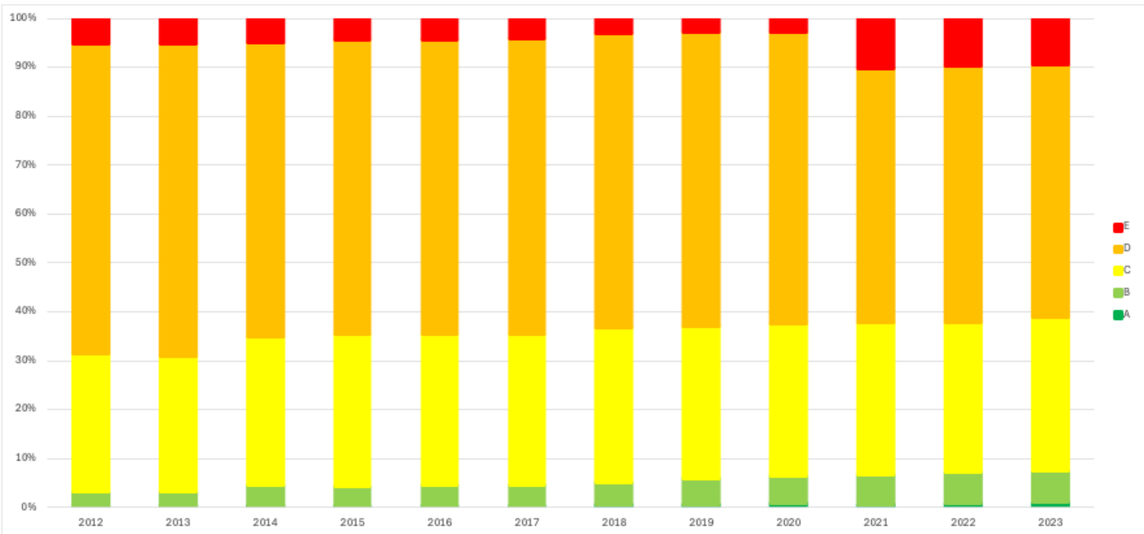
Another way to visualise the market transformation: 2023 vs 2017. In the graph below it appears that in the period show the market is improving Rolling resistance and Wet Grip at the same time.



C3	Budget	Medium	Premium
A-A	0,00%	0,00%	0,14%
A-B	0,11%	0,16%	1,66%
A-C	0,11%	0,48%	1,04%
A-D	0,06%	0,00%	0,00%
A-E	0,00%	0,00%	0,00%
B-A	0,11%	0,00%	1,32%
B-B	1,22%	3,82%	8,32%
B-C	0,66%	2,15%	2,15%
B-D	0,17%	0,00%	0,14%
B-E	0,06%	0,00%	0,00%
C-A	1,33%	1,03%	1,66%
C-B	11,23%	16,31%	22,18%
C-C	12,22%	14,48%	11,43%
C-D	2,16%	0,40%	0,49%
C-E	0,06%	0,00%	0,00%
D-A	2,16%	0,80%	1,32%
D-B	19,75%	17,98%	16,56%
D-C	32,19%	30,79%	23,01%
D-D	5,03%	1,83%	1,73%
D-E	0,06%	0,08%	0,00%
E-A	0,17%	0,00%	0,14%
E-B	4,81%	1,83%	1,52%
E-C	5,92%	6,92%	4,30%
E-D	0,44%	0,95%	0,83%
E-E	0,00%	0,00%	0,07%

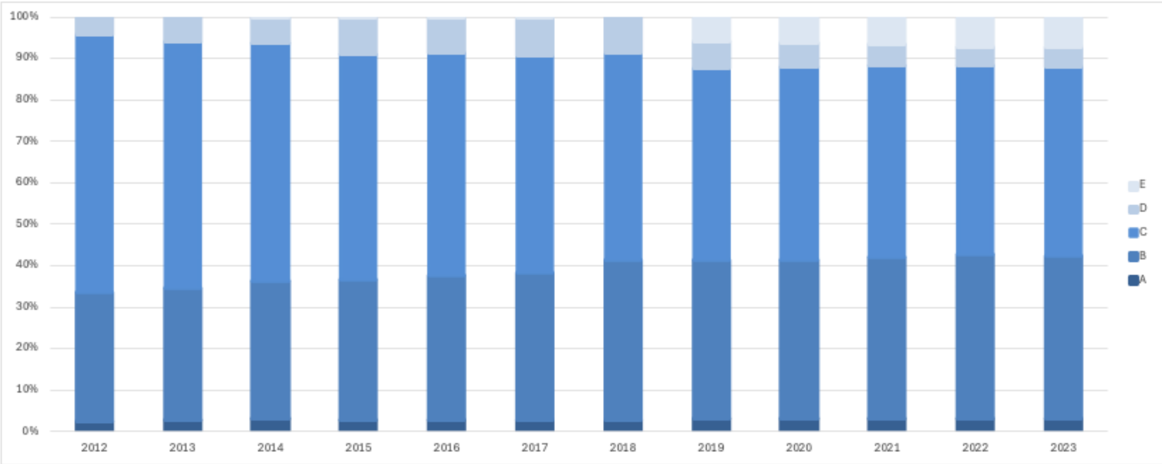
Looking at the market values per Brands Tier in 2023 is indeed showing how premium brands have improved the tyres with label data for a “A” and “B” values to reach more than 11.43%, while the medium brands offer 3.98% and Budget 1.44%.

Evolution of Rolling Resistance label data



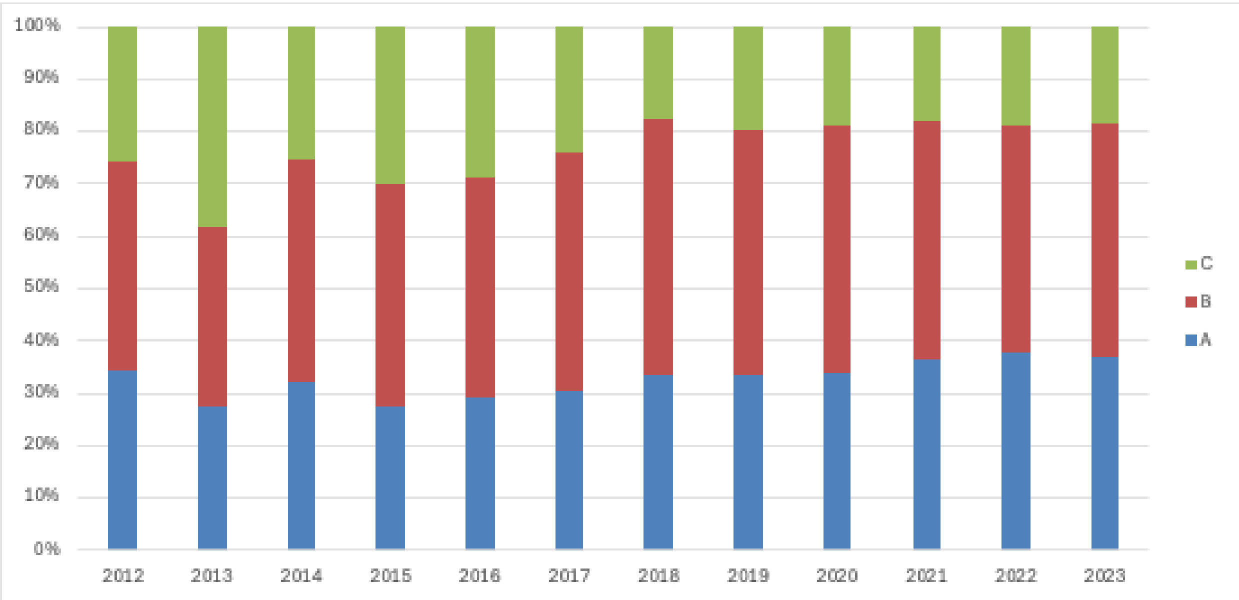
The label data for Rolling Resistance does not show major improvement on the last 5 years (2018 – 2023) due to the weight of Budget brands while Premium and Medium brands improved.

Evolution of Wet Grip label data



The Wet Grip label data shows a stable share of values from 2018 to 2023, due to the weight of Budget brands while Premium and Medium brands improved.

Evolution of Noise label data



The Noise label data show a 6.8% growth of the share of “A” values between 2018 and 2023. The share of “C” values is around 20% in 2023, mainly linked to old tyres labelled according to (EC) 1222/2009 and Budget brands.

EUROPEAN
TYRE & RUBBER
manufacturers'
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