

2025 California Waste Tire Market Report

Draft findings
September 23, 2026



Outline

1. The 2025 Summary
2. Market trends by category
3. Recycling outlook

**The 2025
bottom line:**

**Recycling
remains
resilient amid
strong global
market
influences.**



The 2025 Summary

- Increased amount of total managed tires from the previous year: 598K tons in 2024 increased to 629K tons in 2025, or 62.9M Passenger Tire Equivalents (PTE)
- Recycling rate slightly decreased from 35.6% in 2024 to 35.3% in 2025
- Environmental concerns associated with 6PPD-Q affected the Tire Derived Product (TDP) market in general and Tire Derived Aggregate specifically
- Tire Derived Fuel (TDF) export increased by 33K+ tons, or 3.3M+ PTE, from 34.3% in 2024 to 38.0% of the total managed in 2025
- Landfill disposal decreased from 23.8% in 2024 to 20.8% of the total managed in 2025

2025 California Waste Tire Flows

Total Managed: 629,238 Tons (62.9M PTE*)

- Recycling

- 35.3% of total
- 222,301 tons

Other Recycling 1.6%

Crumb/Ground Rubber 16.3%

Used Tires 8.4%

Retreads 9.0%

- Disposal-Related

- 43.9% of total
- 276,098 tons

TDF (In-State) 3.2%

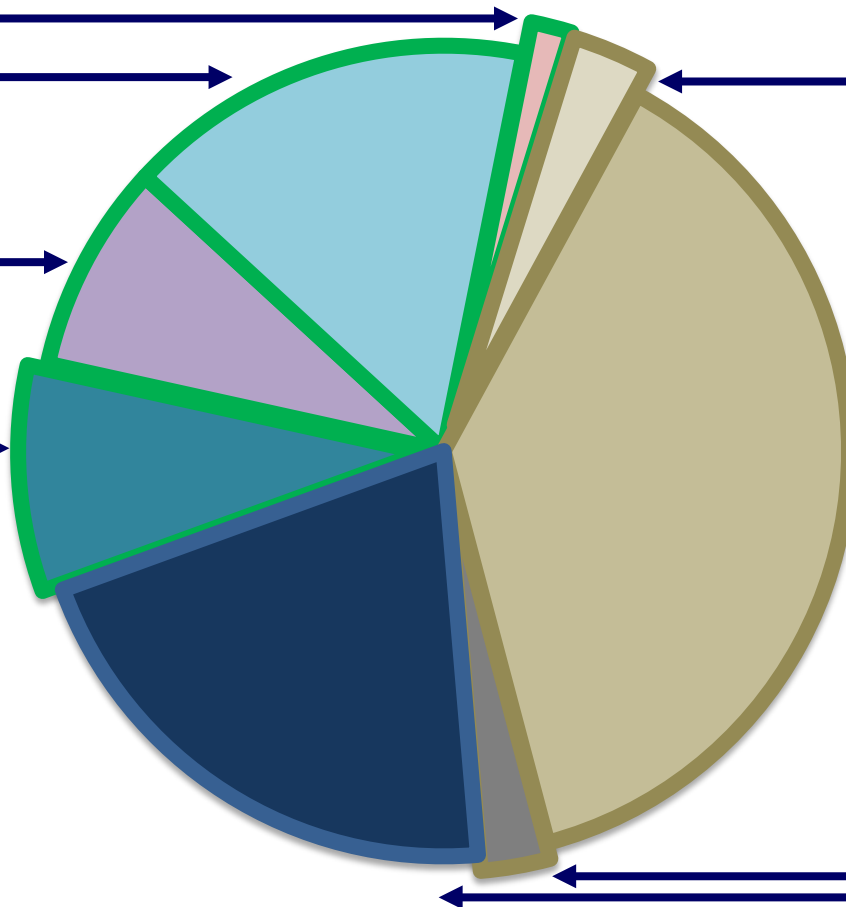
TDF and Bales (Export) 37.9%

Alternative Daily Cover 2.8%

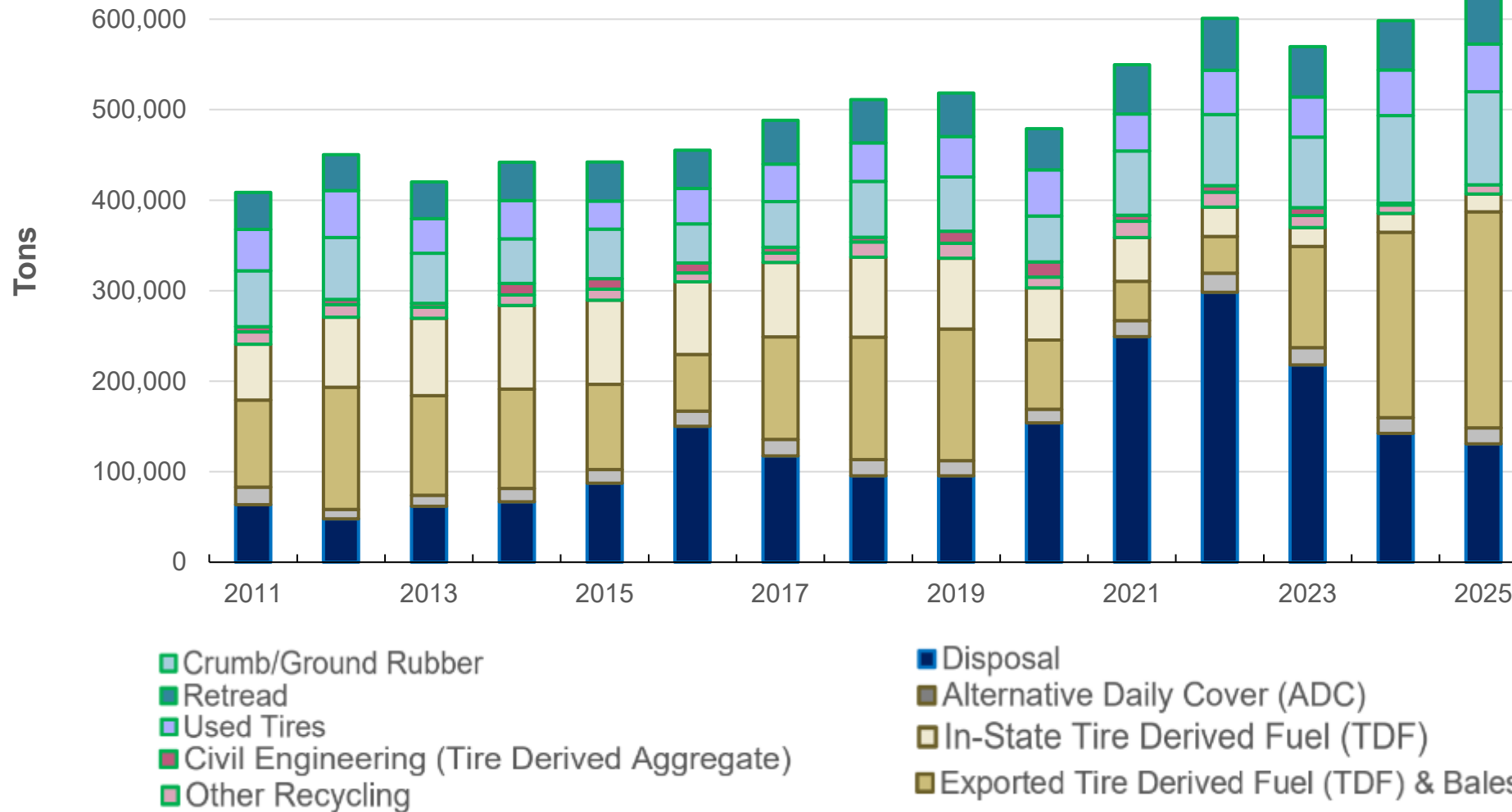
- Disposal

- 20.8% of total
- 130,839 tons

* Passenger Tire Equivalents



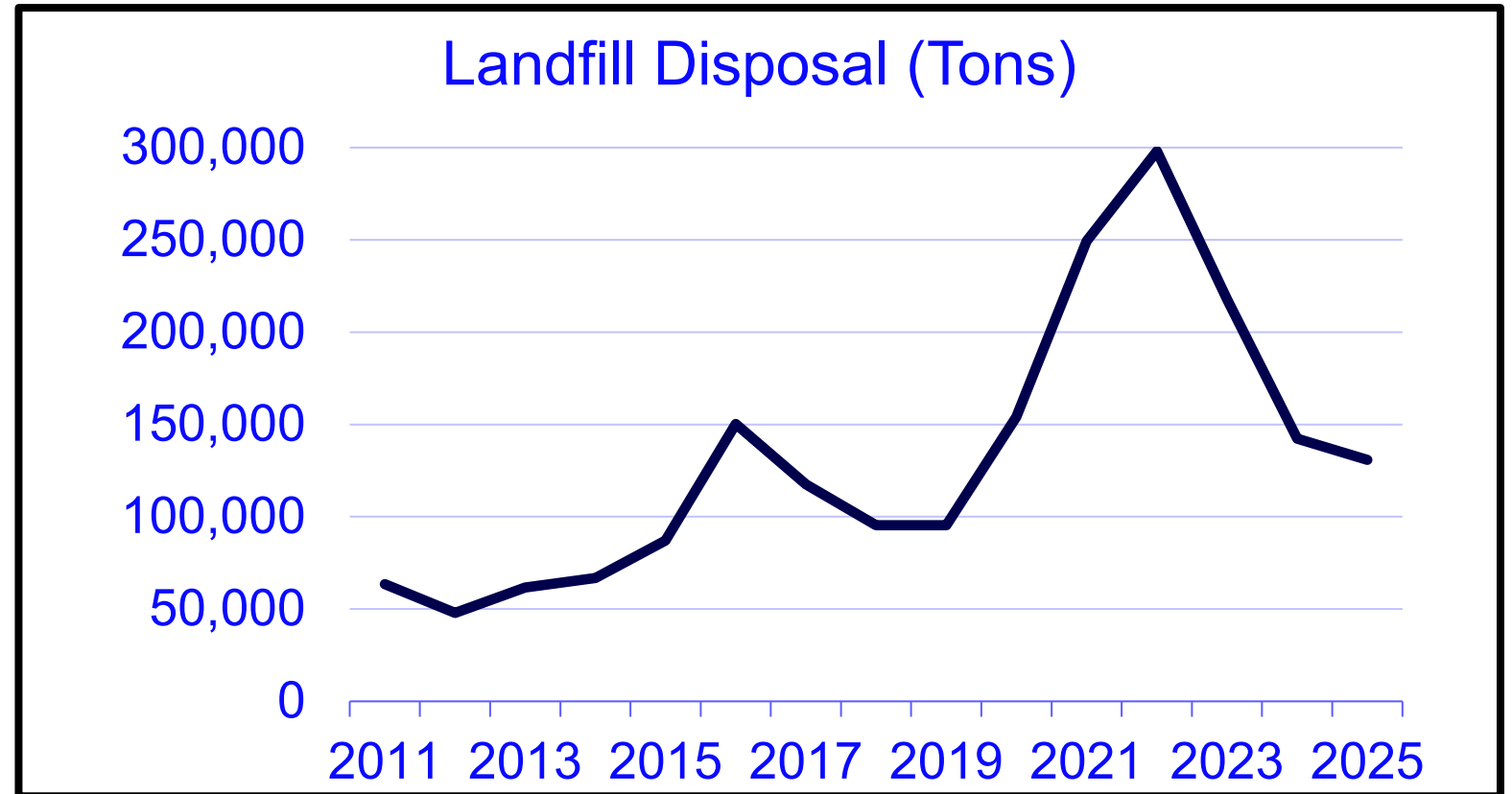
15-Year Trend by Market Segment



2. Market Trends by Category

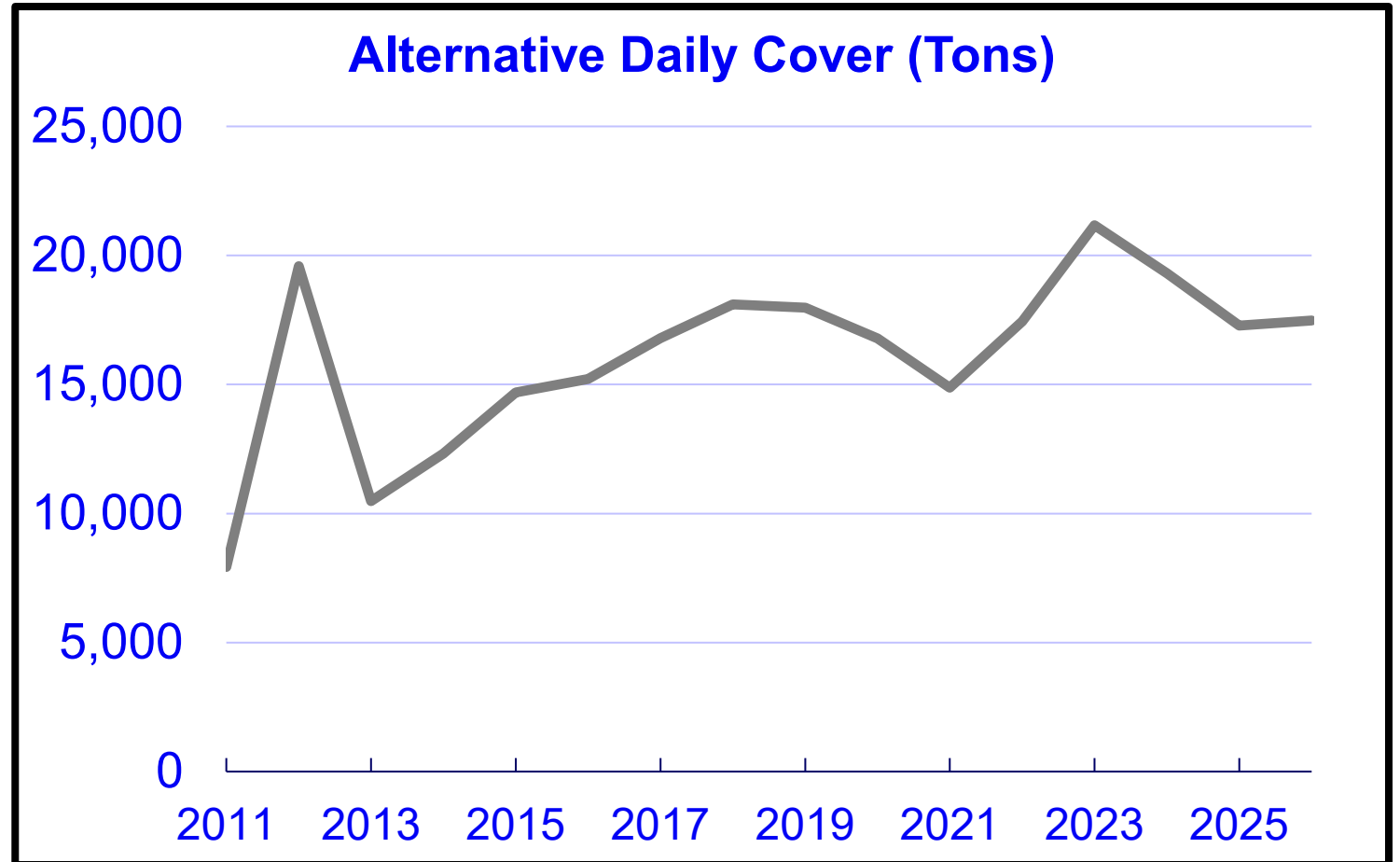
Disposal (Landfill)

- 130,839 tons, 20.8% of total
- Decrease of 8.1% from 2024
- Disposal decrease connected to export increase
- 2026 trend: Landfill disposal tonnage continues to decrease



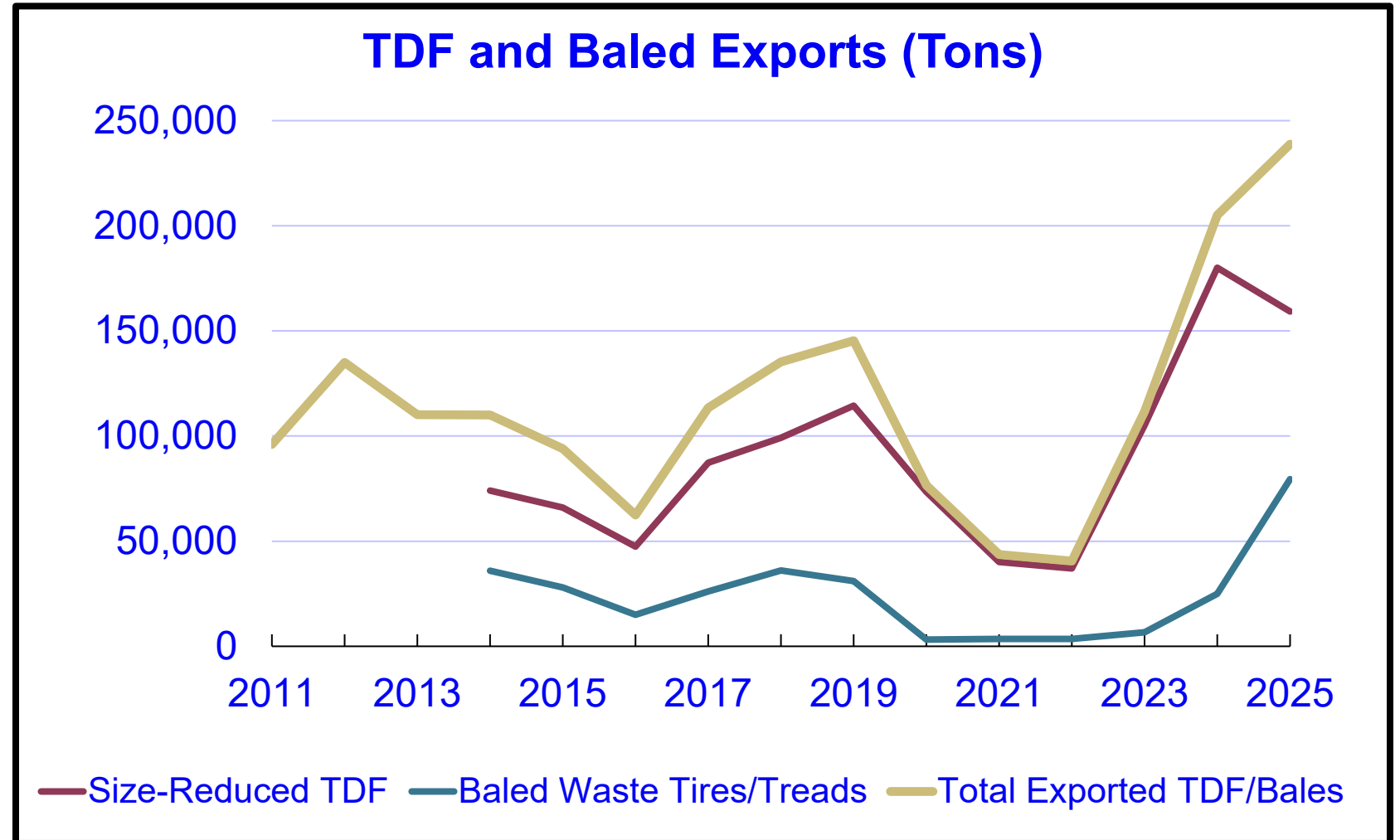
Alternative Daily Cover (ADC)

- 17,474 Tons, 2.8% of total
- Increase of 1.1% from 2024
- In 2024 two landfills used ADC; in 2025 one landfill
- 2026 trend: stable use by one landfill



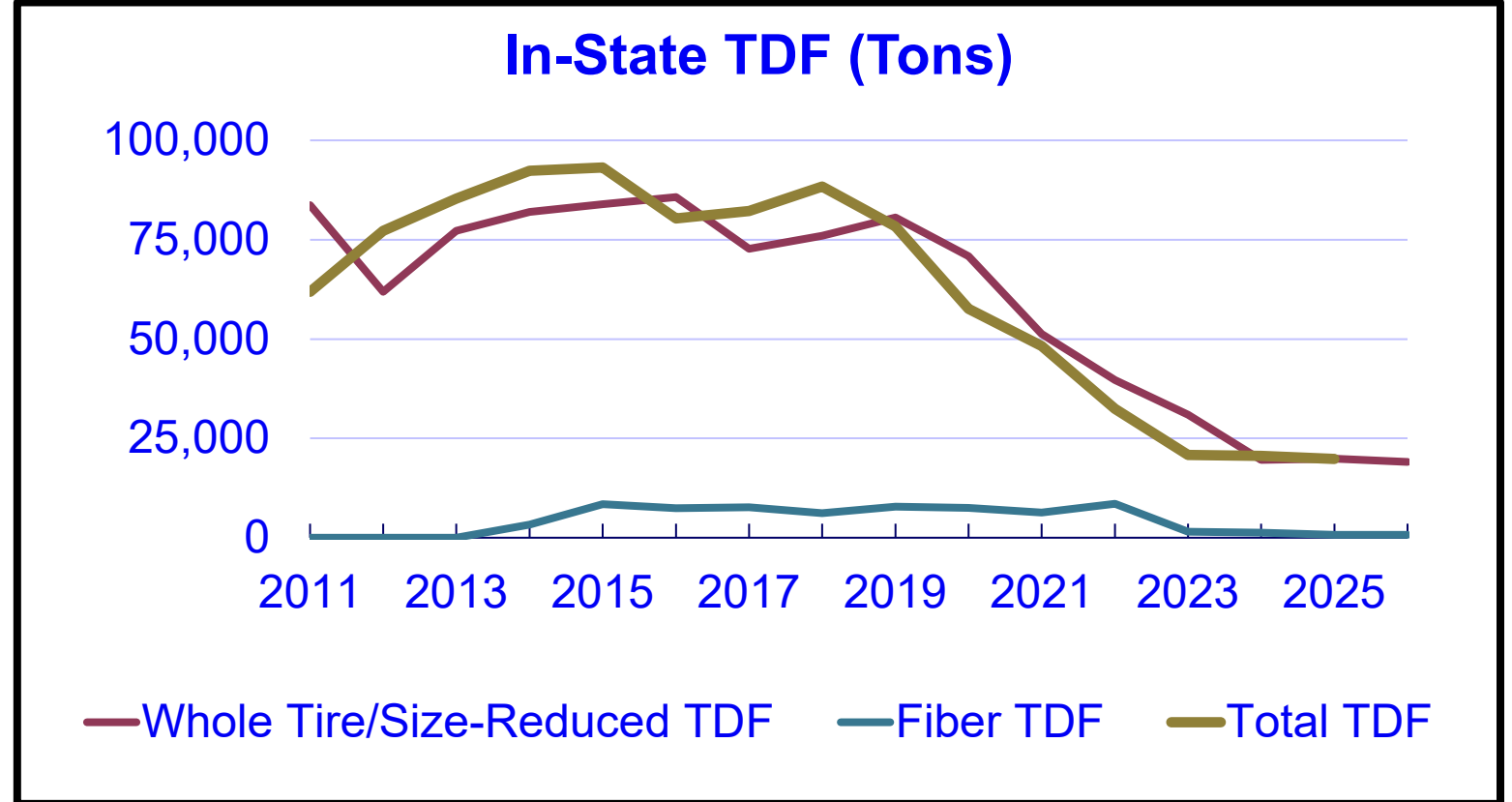
Exported Tire Derived Fuel (TDF) & Baled Waste Tires

- 238,801 tons used in 2025, 38.0% of Total Managed
- Increase of 16.5% from 2024
- Used in cement kilns, power plants, pulp and paper and chemical plants in select countries
- Japan demand decreased in 2025
- India baled and size reduced demand increased in 2025
- 2026 trend: export demand continues to grow



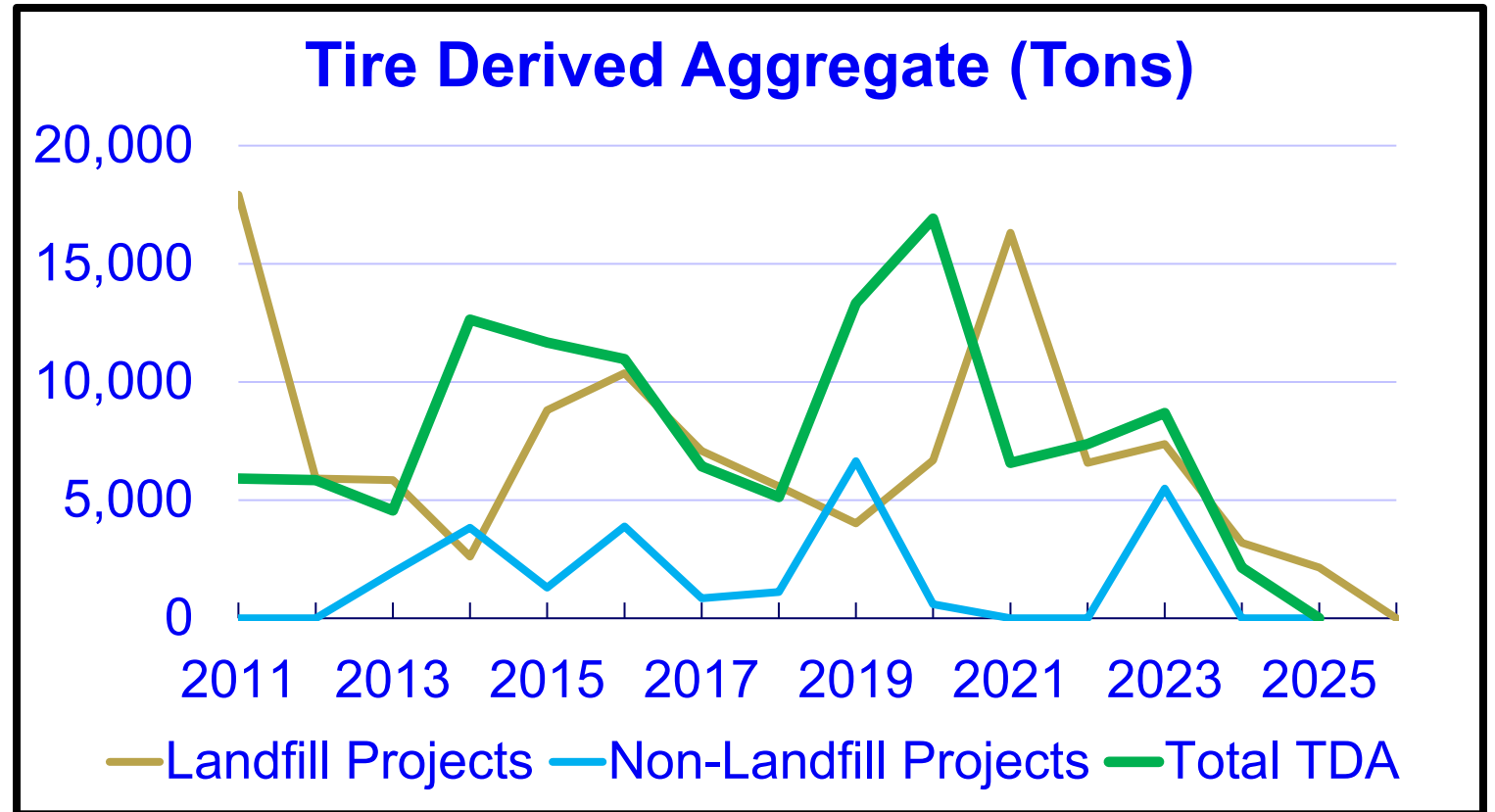
In-State Tire Derived Fuel (TDF)

- 19,823 tons, 3.2% of total
- Decrease of 3.8% from 2024
- Two California cement kilns take whole tires as TDF
- One kiln takes Fiber
- 2026 trend: stable low tonnage



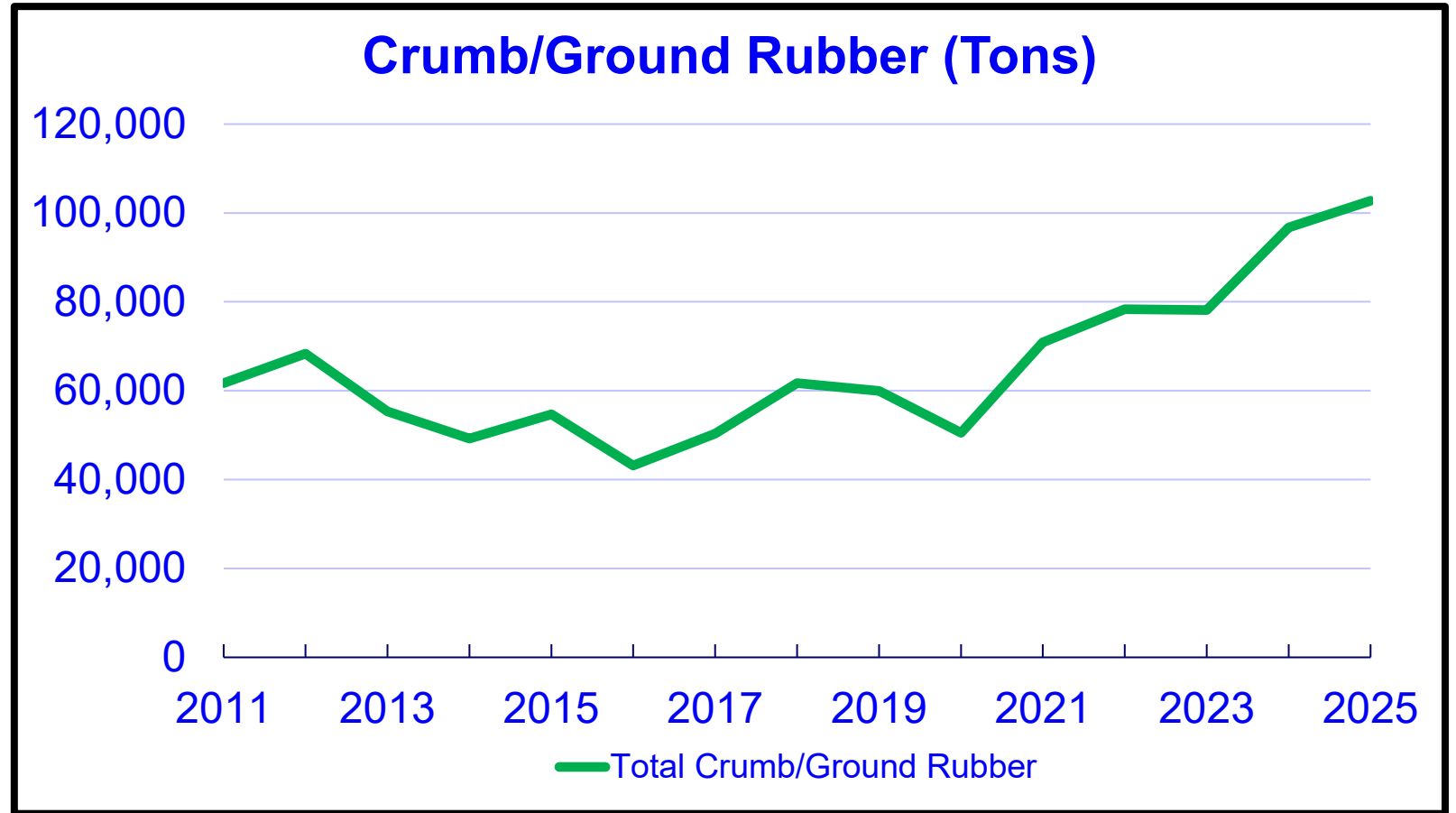
Civil Engineering (Tire Derived Aggregate)

- 0 Tons, 0% of total
- Environmental concerns have stunted non-landfill use
- Grant solicitation published for 2026 is \$750K/year allocated
- 2026 forecast: increased use, based on two grants (a landfill and a non-landfill) awarded in FY 2025/26



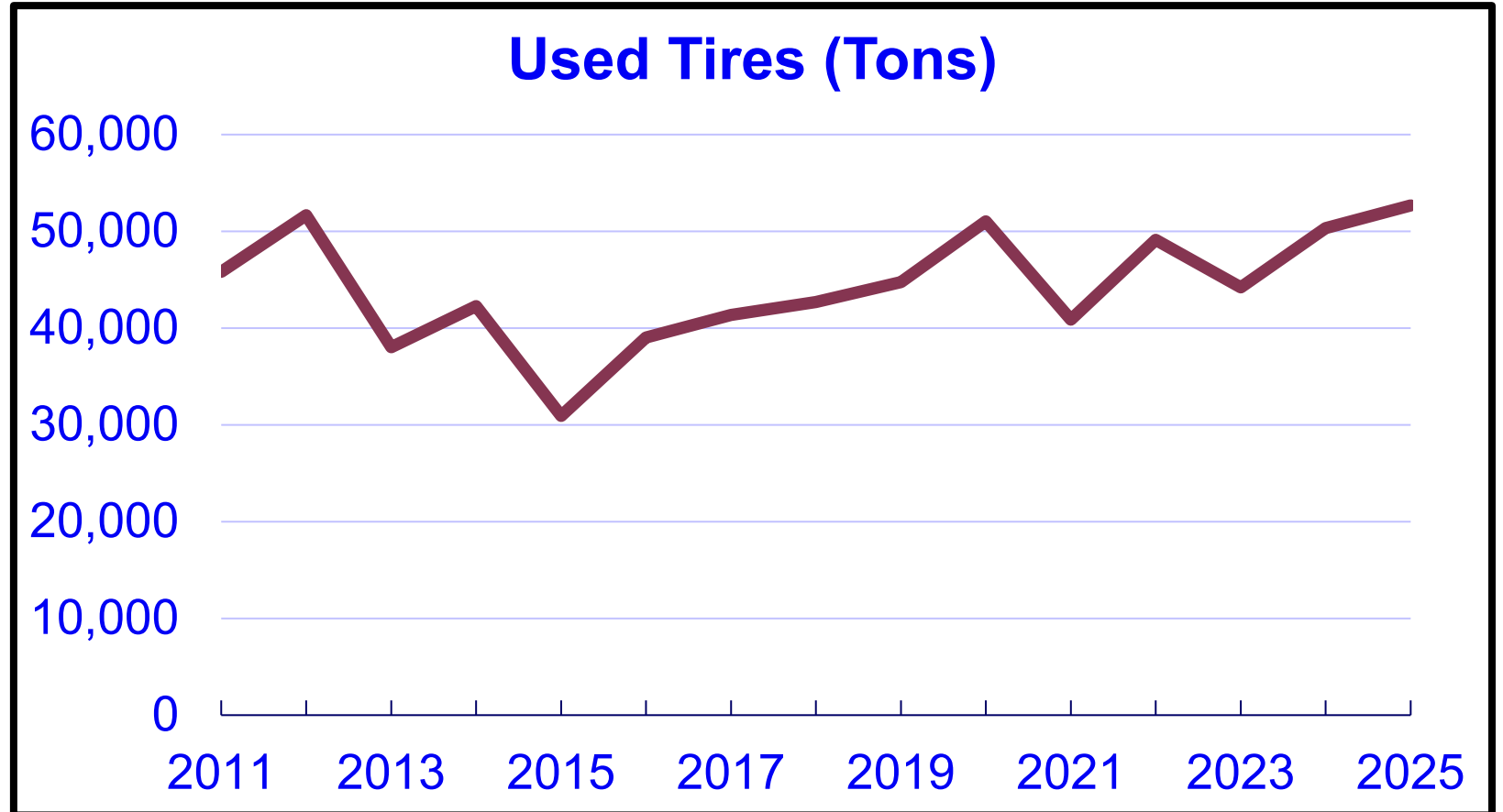
Crumb/Ground Rubber

- 102,749 tons, 16.3% of total
- Increase of 6.2% from 2024
- Attributed to increased use of Rubberized Hot Mix Asphalt (RHMA) and increased Tire Incentive Program (TIP) use
- Includes paving, molded/other, and turf infill
- 2026 trend: continued increase but with slower rate



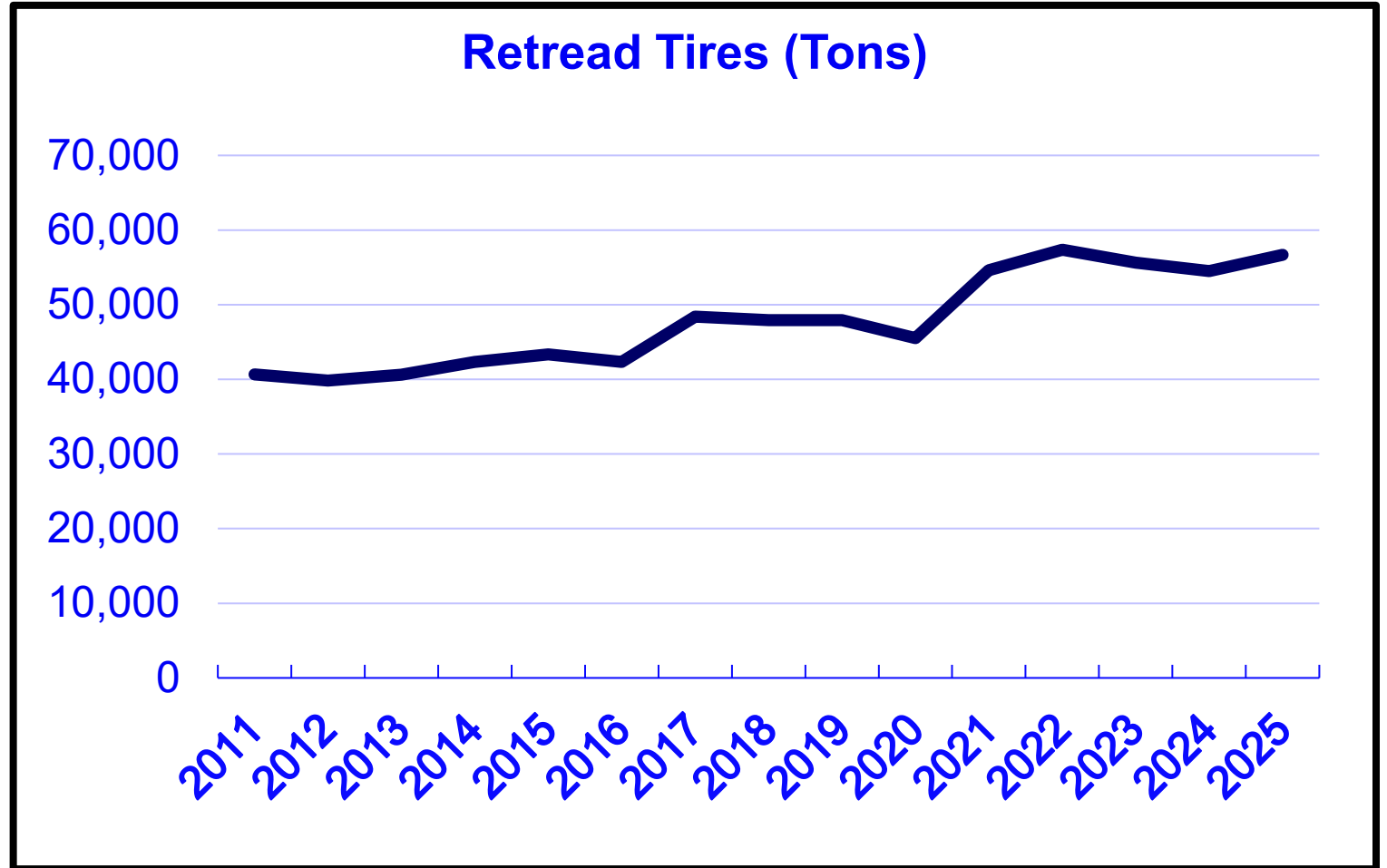
Used Tires

- 52,678 tons or 5.2M PTE in 2025, 8.4% of Total Managed
- Increased tonnage by 4.7% from 2024
- Used tires are sold in CA
- Also exported to Mexico
- 2026 trend: expected increase



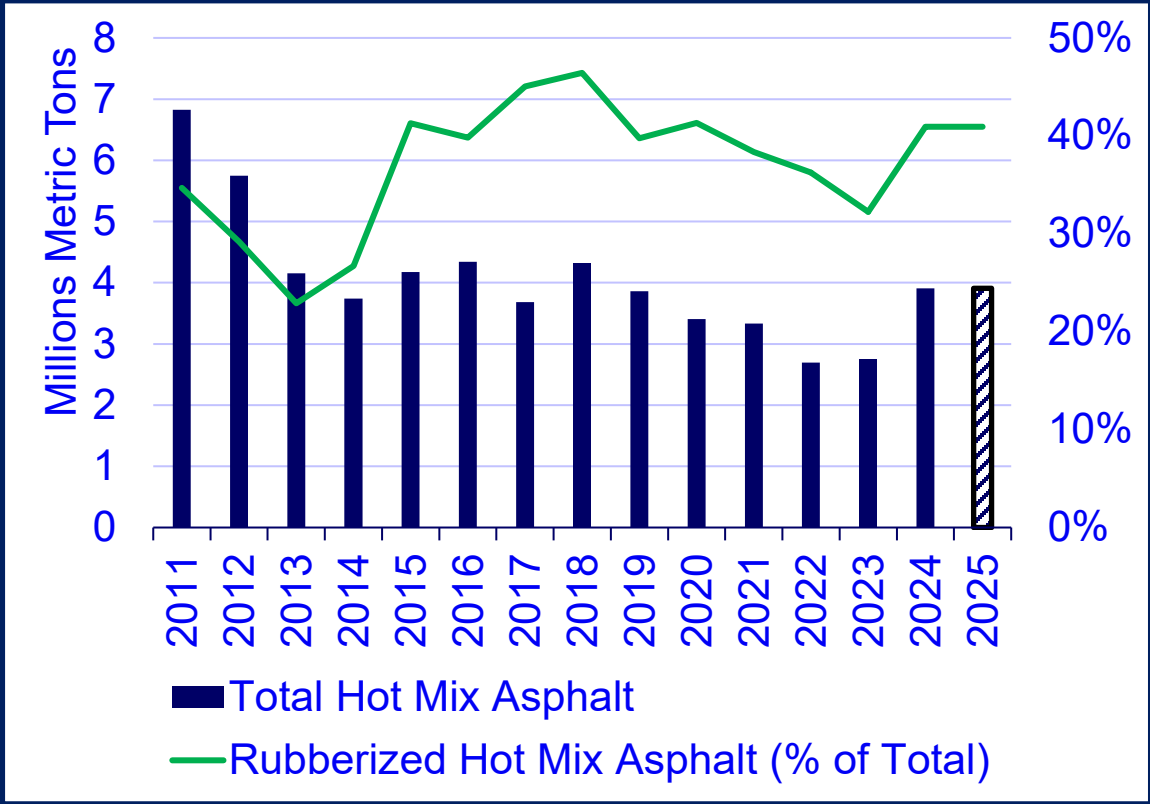
Retreads

- 56,701 tons, 9.0% of total
- Increase of 4.0% from 2024
- Competing with inexpensive import tires
- 2026 trend: Stable reported by Retreaders, based on trade and consumer value

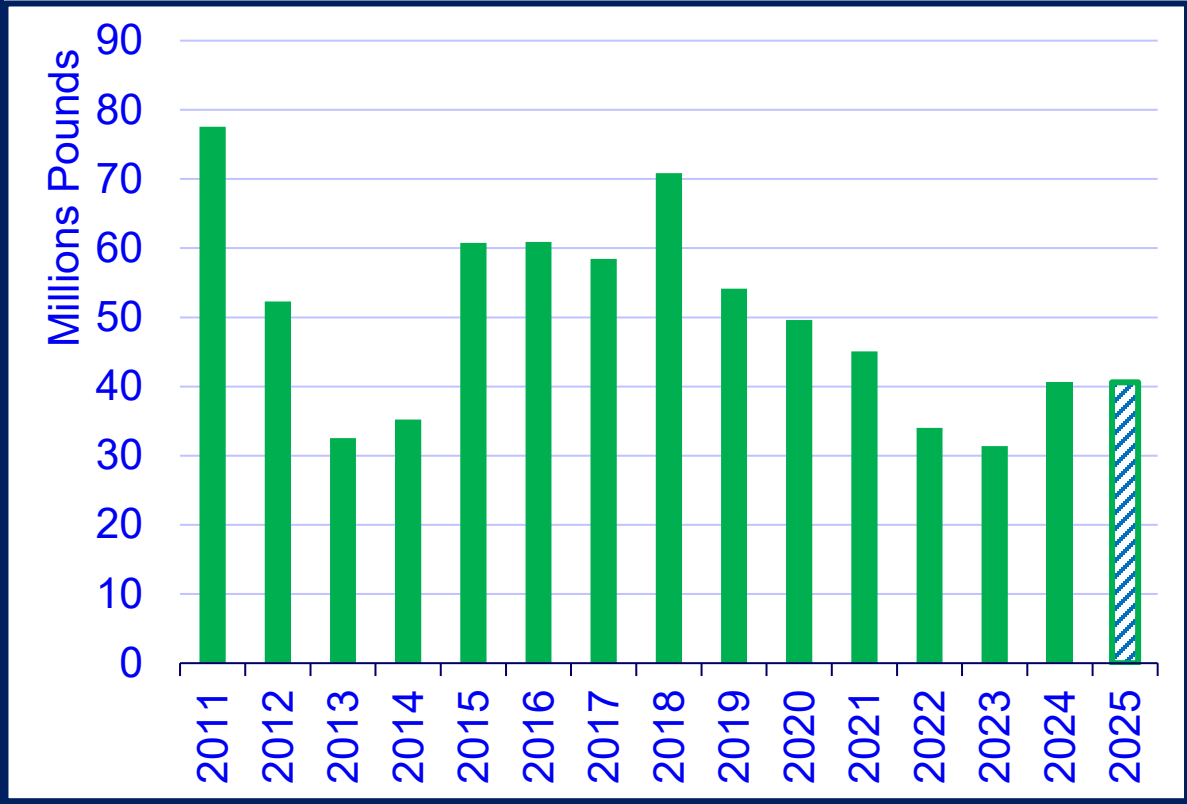


Caltrans Rubberized Paving

Total asphalt placed and percent rubberized hot mix asphalt



Caltrans crumb rubber used



Source: Caltrans Annual Crumb Rubber Reports

2025 numbers are currently not available, shown values reflect 2024 amounts

2025 CalRecycle Support

Rubberized Pavement Grant Program (TRP)

- TRP18 (FY 2025/26): 38 grantees awarded in 2025, collectively proposing to use an estimated 13.1M pounds over the grant period
- 10-Year Historic Average: 7.1M pounds per year

Tire Incentive Program (TIP)

- TIP13 (FY 2025/26): 5 grantees awarded in 2025; collectively proposing to use an estimated 14.4M pounds over the grant period
- TIP participants reported purchases of 22.2M pounds in 2025
- 10-Year Historic Average: 12.4M pounds per year

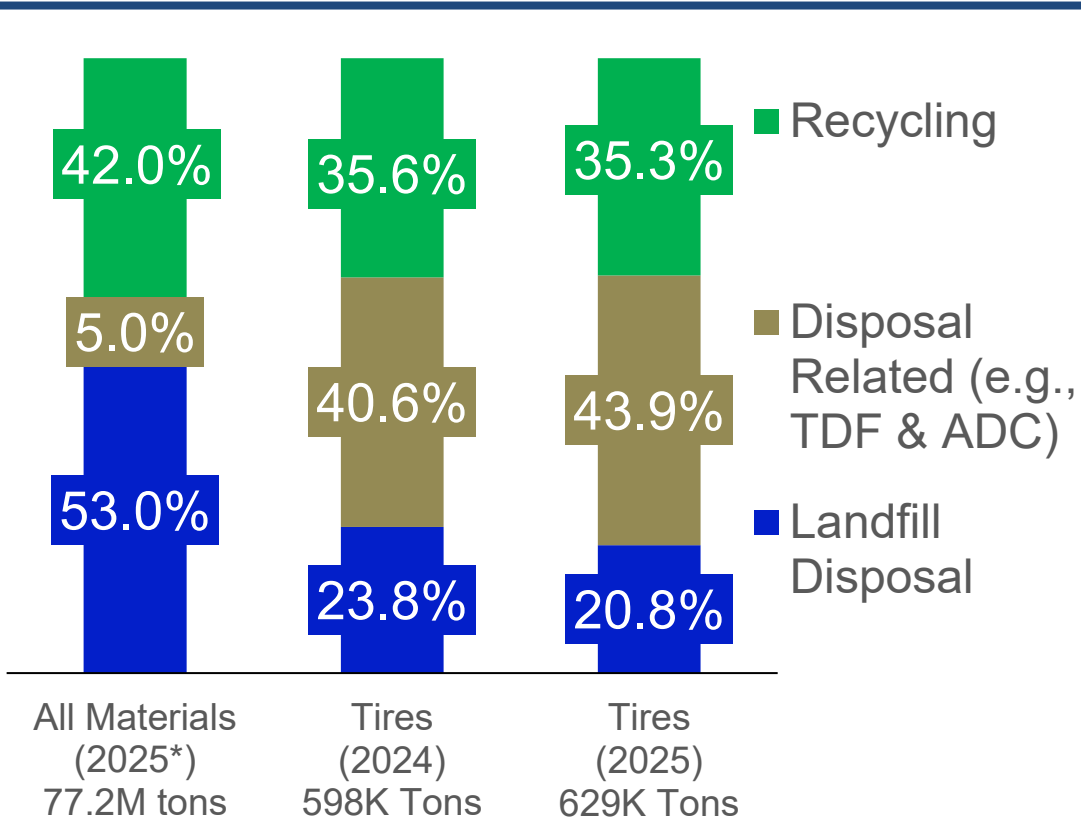
Tire Derived Aggregate (TDA) Grant Program

- TDA25 and TDA27 (FY 2025/26): 1 landfill and 1 non-landfill grantees awarded in 2025; collectively proposing to use an estimated 10.0M pounds over the grant period
- 10-Year Historic Average: 6.2M pounds per year

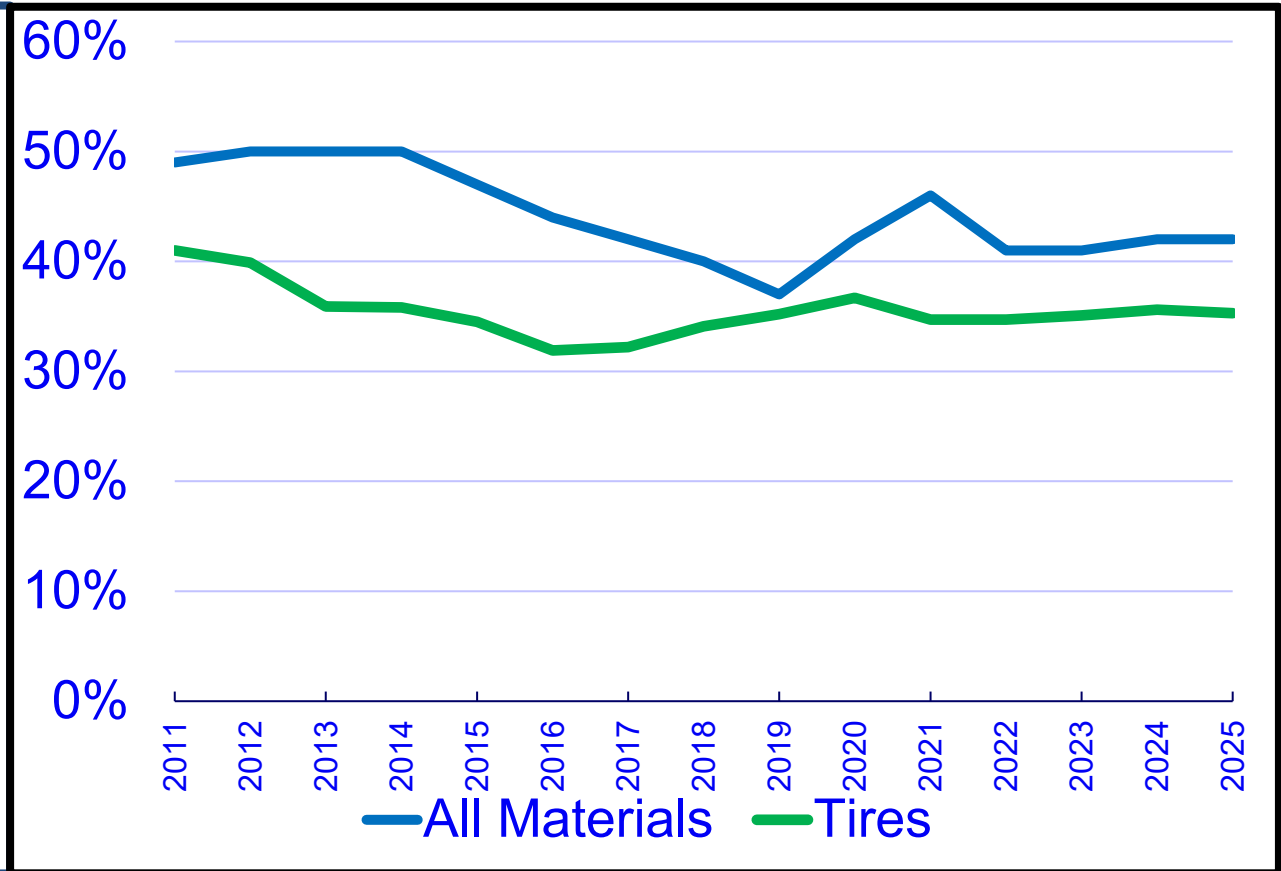
3. Recycling Outlook

Waste Tire Management in the California Context

How waste was managed

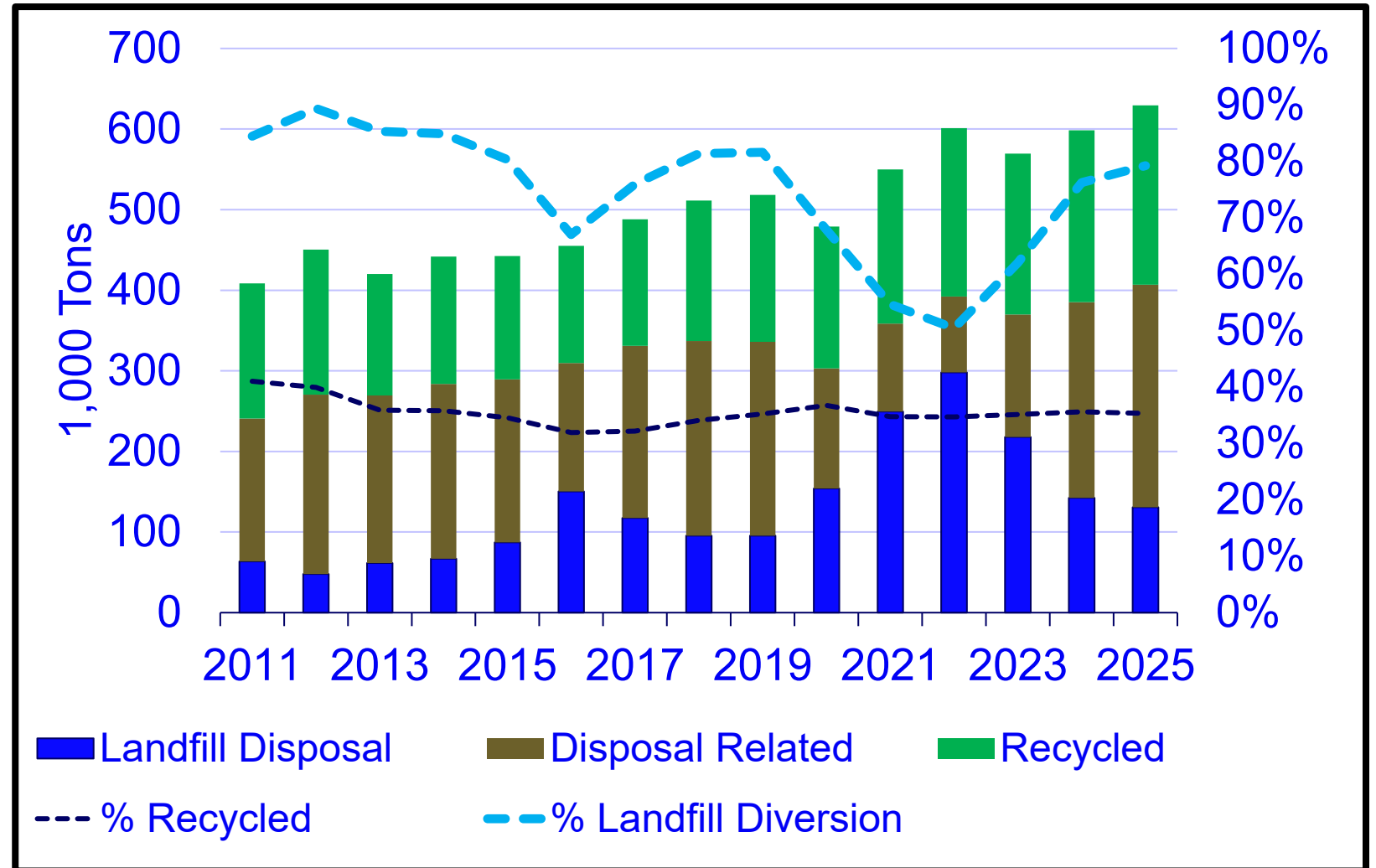


Recycling rate trend



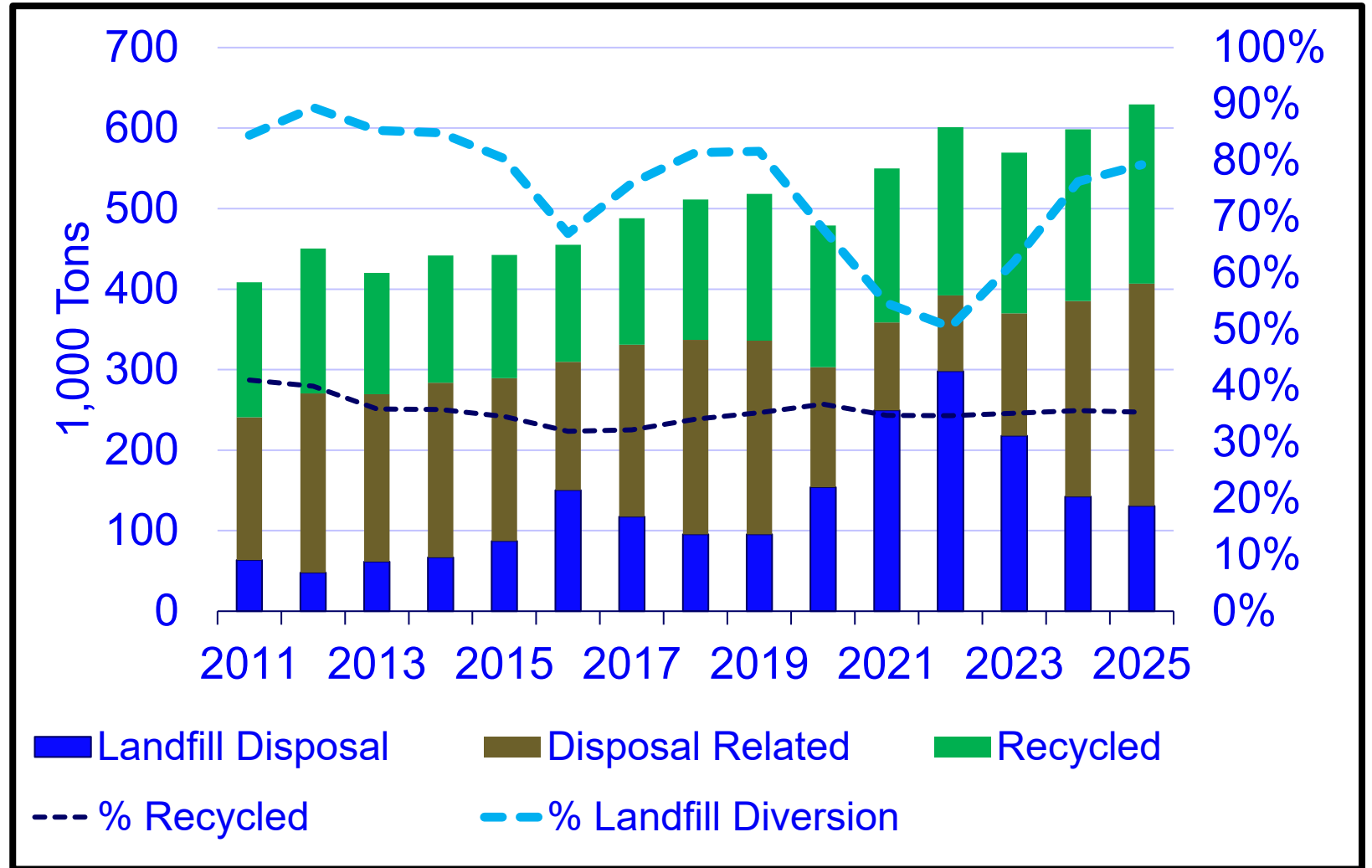
Recycling Summary 2025

- 2025 waste tire recycling tons increased by 4.3% to 222,301 tons
- 2025 waste tire recycling rate decreased by 0.3% to 35.3%



Recycling Outlook 2026

- 2026 trend considerations
 - Recycling rate relatively stable
 - TDA use is expected to increase due to recently awarded TDA grants, contributing to the future recycling tonnage
 - Landfill disposal rate expected to decrease as exports continue to increase
 - TDM producer consolidations continue



Feedback welcomed by October 21, 2026

Questions?

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Appendix

Source Data Used for Charts

Slide 5 Source Data: California Waste Tire Flows (2025)

Category	2025 Tons	2025 Percent
Retreads	56,701	9.0%
Used Tires	52,678	8.4%
Tire Derived Aggregate	0	0.0%
Crumb/Ground Rubber	102,749	16.3%
Other Recycling	10,173	1.6%
TDF (In-State)	19,823	3.2%
TDF (Export)	159,301	25.3%
Baled Waste Tires & Treads (Export)	79,500	12.6%
ADC/Beneficial Reuse	17,474	2.8%
Landfill Disposal	130,839	20.8%
Total	629,238	100.0%

Slides 6, 8, 9, and 12 Source Data: 15-Year Trend by Market Segment (Tons), Part A

Category	2011	2012	2013	2014	2015	2016	2017
Disposal	63,444	47,908	61,682	66,770	87,170	150,226	117,448
ADC	19,589	10,486	12,316	14,691	15,217	16,798	18,108
Exported TDF & Bales	96,000	135,000	110,144	110,000	94,000	62,476	113,405
In-State TDF	61,911	77,209	85,295	92,352	93,165	80,380	82,194
Other Recycling	13,427	14,059	12,166	11,643	12,114	9,790	10,433
Civil Engineering (TDA)	5,915	5,844	4,557	12,632	11,668	10,961	6,431
Crumb/Ground Rubber	61,700	68,350	55,350	49,200	54,700	43,165	50,345
Used Tires	45,823	51,678	38,033	42,278	30,927	39,032	41,375
Retread	40,651	39,838	40,635	42,341	43,358	42,341	48,409
Total Managed	408,459	450,372	420,177	441,907	442,318	455,168	488,149

Slides 6, 8, 9, and 12 Source Data: 15-Year Trend by Market Segment (Tons), Part B

Category	2018	2019	2020	2021	2022	2023	2024	2025
Disposal	95,401	95,412	154,050	249,377	298,084	217,909	142,339	130,839
ADC	17,975	16,784	14,876	17,440	21,169	19,307	17,286	17,474
Exported TDF & Bales	135,236	145,412	76,612	43,664	40,537	111,721	205,055	238,801
In-State TDF	88,386	78,307	57,611	48,243	32,457	20,858	20,606	19,823
Other Recycling	16,791	16,442	11,862	18,082	16,587	13,200	9,410	10,173
Civil Engineering (TDA)	5,127	13,330	16,911	6,575	7,371	8,682	2,150	0
Crumb/Ground Rubber	61,728	59,985	50,530	70,862	78,341	78,159	96,743	102,749
Used Tires	42,692	44,757	51,036	43,044	49,112	44,203	50,319	52,678
Retread	47,925	47,925	45,529	54,635	57,366	55,645	54,521	56,701
Total Managed	511,262	518,353	479,017	551,921	601,024	569,684	598,429	629,238

Slide 10 Source Data: Exported California-Generated TDF and Waste Tire/Tread Bales (Tons)

Category	2011	2012	2013	2014	2015	2016	2017	2018
Size-Reduced TDF	NA	NA	NA	74,000	66,000	47,476	87,317	99,197
Baled Waste Tires & Treads	NA	NA	NA	36,000	28,000	15,000	26,089	36,039
Total Exported TDF/Bales	96,000	135,000	110,144	110,000	94,000	62,476	113,405	135,236

Category	2019	2020	2021	2022	2023	2024	2025
Size-Reduced TDF	114,427	73,412	40,148	37,037	105,091	180,055	159,301
Baled Waste Tires & Treads	30,985	3,200	3,516	3,500	6,630	25,000	79,500
Total Exported TDF/Bales	145,412	76,612	43,664	40,537	111,721	205,055	238,801

Slide 11 Source Data: California Generated In-State TDF Shipments (Tons)

Category	2011	2012	2013	2014	2015	2016	2017	2018
In-State TDF (Whole Tires and Size-Reduced)	61,911	77,209	81,982	83,934	85,721	72,723	75,989	80,603
Fiber From Processors	NA	NA	NA	8,418	7,443	7,656	6,205	7,783
Total Exported TDF/Bales	61,911	77,209	85,295	92,352	93,165	80,380	82,194	88,386

Category	2019	2020	2021	2022	2023	2024	2025
In-State TDF (Whole Tires and Size-Reduced)	70,807	57,939	39,704	30,915	19,558	19,856	19,073
Fiber From Processors	7,500	6,297	8,539	1,542	1,300	750	750
Total Exported TDF/Bales	78,307	57,611	48,243	32,457	20,858	20,606	19,823

Slide 12 Source Data:

Civil Engineering (Tire Derived Aggregate) (Tons)

Category	2011	2012	2013	2014	2015	2016	2017
Landfill Projects	5,915	5,844	2,612	8,806	10,374	7,083	5,583
Non-Landfill Projects	0	0	1,945	3,826	1,294	3,878	853
Total Civil Engineering	5,915	5,844	4,557	12,632	11,668	10,961	6,431

Category	2018	2019	2020	2021	2022	2023	2024	2025
Landfill Projects	4,021	6,682	16,311	6,575	7,371	3,200	2,150	0
Non-Landfill Projects	1,106	6,648	600	0	0	5,482	0	0
Total Civil Engineering	5,127	13,330	16,911	6,575	7,371	8,682	2,150	0

Slide 13 Source Data: Crumb Rubber and Ground Rubber Shipments (Tons)

Category	2011	2012	2013	2014	2015	2016	2017	2018
Paving	34,043	30,793	24,806	23,429	27,808	NA	NA	NA
Turf	11,871	15,089	14,034	11,355	13,415	NA	NA	NA
Molded / Other	8,357	10,076	6,583	6,719	4,759	NA	NA	NA
Ground Rubber Applications	7,428	12,392	9,927	7,698	8,718	NA	NA	NA
Total	61,700	68,350	55,350	49,200	54,700	43,165	50,345	61,728

Category	2019	2020	2021	2022	2023	2024	2025
Paving	NA	NA	NA	NA	NA	NA	NA
Turf	NA	NA	NA	NA	NA	NA	NA
Molded / Other	NA	NA	NA	NA	NA	NA	NA
Ground Rubber Applications	NA	NA	NA	NA	NA	NA	NA
Total	59,985	50,530	70,862	78,341	78,159	96,743	102,749

Slide 16 Source Data: Caltrans Rubberized Paving, Part A

Total Asphalt Placed and Rubber Asphalt % of Total

Category	2011	2012	2013	2014	2015	2016	2017	2018
Total Asphalt Placed (Million Metric Tons)	7.52	6.33	4.58	4.12	4.60	4.79	4.06	4.77
Rubberized Asphalt (RHMA) (% of Total)	34.7	29.2	22.9	26.7	41.3	39.8	45.0	46.3

Category	2019	2020	2021	2022	2023	2024	2025*
Total Asphalt Placed (Million Metric Tons)	3.86	3.40	3.28	2.70	2.76	3.91	3.91
Rubberized Asphalt (RHMA) (% of Total)	39.8	41.3	38.0	36.2	32.2	40.9	40.9

Source: * 2025 Caltrans Annual Crumb Rubber Report data not currently available, 2024 data as placeholder

Slide 16 Source Data: Caltrans Rubberized Paving, Part B

Caltrans Crumb Rubber Used and Pounds per Total Metric Ton Asphalt Placed

Category	2011	2012	2013	2014	2015	2016	2017
Caltrans Crumb Rubber Used (M Pounds)	77.5	52.3	32.5	35.2	60.8	60.9	58.5

Category	2018	2019	2020	2021	2022	2023	2024	2025*
Caltrans Crumb Rubber Used (M Pounds)	70.8	54.1	49.6	45.1	34.0	31.4	40.6	40.6

Source: * 2025 Caltrans Annual Crumb Rubber Report data not currently available, 2024 data as placeholder

Slide 19 Source Data: All Materials and Tires Recycling Rate Trend, Part B (Right Chart)

Year	All Materials Recycling Rate	Waste Tires Recycling Rate
2011	49.0%	41.0%
2012	50.0%	39.9%
2013	50.0%	35.9%
2014	50.0%	35.8%
2015	47.0%	34.5%
2016	44.0%	31.9%
2017	42.0%	32.2%
2018	40.0%	34.1%
2019	37.0%	35.2%
2020	42.0%	36.7%
2021	40.0%	35.0%
2022	41.0%	33.1%
2023	41.0%	35.1%
2024	42.0%	35.6%
2025	42.0%*	35.3%

Source: * 2025 All Materials Recycling Rate data not currently available

Slide 19 Source Data: How Waste Was Managed, Part A (Left Chart)

Category	All Materials (2025*) 76M Tons	Tires (2024) 598K Tons	Tires (2025) 629K Tons
Landfill Disposal	53.0%	23.8%	20.8%
Disposal-Related	5.0%	40.6%	43.9%
Recycling	42.0%	35.6%	35.3%
Total	100%	100%	100%

* 2025 numbers are currently not available, values reflect 2024

Slide 20 Source Data: Recycling and Diversion Trend

Category	2011	2012	2013	2014	2015	2016	2017	2018
Landfill Disposal (Tons)	63,444	47,908	61,682	66,770	87,170	150,226	117,448	95,401
Disposal-Related (Tons)	177,500	222,695	207,754	217,043	202,382	159,654	213,707	241,597
Recycled (Tons)	167,516	179,768	150,741	158,094	152,767	145,288	156,994	174,264
% Recycled	41.0%	39.9%	35.9%	35.8%	34.5%	31.9%	32.2%	34.1%
% Landfill Diversion	84.5%	89.4%	85.3%	84.9%	80.3%	67.0%	75.9%	81.3%

Category	2019	2020	2021	2022	2023	2024	2025
Landfill Disposal (Tons)	95,412	154,050	249,377	298,084	217,909	142,339	130,839
Disposal-Related (Tons)	240,503	149,099	109,347	94,163	151,886	242,947	276,098
Recycled (Tons)	182,438	175,868	193,197	208,777	199,889	213,143	222,301
% Recycled	35.2%	36.7%	35.0%	34.7%	35.1%	35.6%	35.3%
% Landfill Diversion	81.6%	67.8%	54.8%	50.4%	61.7%	76.2%	79.2%