

TYRE STEWARDSHIP AUSTRALIA

# Strategy

2025-2028





# About this Strategy

This strategy gives a high-level overview of who TSA is, and what we will focus on for the next three years. The strategy:

- outlines our vision, mission and values
- explains the 'strategic pillars' that are the ongoing foundation of our work
- lists the 'objectives' that define what we will achieve and where we will focus our resources.

TSA applies a multi-disciplinary approach, integrating our skills, and collaborating with stakeholders to achieve outcomes.

From this strategy, TSA will develop plans that allocate resources to maximise the return on effort, and to measure our effectiveness.

# Achieving Together

The foundation of TSA's strategy is collaboration, engaging with all the entities that have a stake in the manufacturing, distribution, sale, use, recycling, and re-purposing of tyres.

The barriers are diverse and challenging, but the benefits are many – economically, socially, and environmentally. Only by working together can we overcome these barriers and achieve our shared objectives and achieve our mission.

**We invite you to join us in our journey to create a circular economy for end-of-life tyres in Australia.**

The road ahead is a long one, and we look forward to travelling it with you.



# Introduction

## About Tyre Stewardship Australia

TSA is a not-for-profit product stewardship organisation. Authorised by the Australian Competition and Consumer Commission (ACCC), TSA administers the voluntary Tyre Product Stewardship Scheme (Scheme) in accordance with the Scheme Guidelines.

## About the Scheme

The objectives of the Scheme are to:

- increase resource recovery and recycling and minimise the environmental, health and safety impacts of end-of-life tyres (EOLT) generated in Australia
- develop Australia’s tyre recycling industry and markets for tyre-derived products (TDP).

The Scheme is funded voluntarily by conscientious tyre and automotive manufacturers and importers who contribute a levy on the tyres they sell in Australia.

### Contributing tyre and automotive brands

 ASCENSO never stop rising	 BEARCAT TYRES • WHEELS • RUBBER TRACKS
 BRIDGESTONE	 BRIDGESTONE Solutions for your journey
 Continental	 GETAGRIP TYRES & FLEET
 GOODYEAR	 HANKOOK driving emotion
 KALTIRE	 KUMHO TYRES
 Mercedes-Benz	 MICHELIN
 PIRELLI	 PORSCHE
 TOYO TIRES	 YOKOHAMA

## Towards a circular economy

To sustain Australia’s prosperity, we must build a more dynamic and resilient, net-zero emissions economy. This includes making better use of the products and materials we consume, both in terms of being more efficient (minimising waste) and being more productive (maximising outputs).

Tyres are vital to our economy, and circular economy principles can guide how we can work together to optimise their use. These principles are to:

- eliminate waste and pollution
- circulate products and materials at their highest value
- regenerate nature.

The circular economy is more than just recycling. It encompasses the entire product lifecycle. By embracing a circular economy, Australia advances five United Nations Sustainable Development Goals, as detailed on pages 18-19.

## Creating markets

To encourage end markets for recycled tyre materials, TSA employs a ‘dual circulation strategy.’ This means achieving much stronger domestic material circularity (internal circulation) while continuing to strengthen Australia’s international economic position by participating and specialising in, high-value global markets (external circulation).

The internal and external circulation loops are interlinked. By recovering all our end-of-life tyres, we will have enough material to (re)industrialise to produce the products that global and domestic markets need.

Under this ‘dual circulation strategy,’ TSA will focus on circular opportunities identified as most likely to succeed:

- ‘advanced manufacturing’ for global markets
- constructing ‘resilient civil infrastructure,’ such as roads, within Australia.





# Our Strategy

## Our vision

A circular economy for Australia’s used tyres and conveyor belts which contributes to a sustainable society.

## Our mission

To maximise the circular value of the resources in used tyres and conveyor belts.

## Our values



### Respect

We accept and respect each other’s rights, needs and differences.

We communicate mindfully and positively using tone, words and body language.



### Passion, perseverance and energy

We approach our work with purpose and enthusiasm.

We support our team to discover, build and maintain passion, while always respecting each other’s energy levels.

We are resilient and can withstand adversity.

We will plan ahead, engage with stakeholders for support, grow from experiences and always follow up.



### Collaboration

We generously share our knowledge and skills across the organisation.

We identify opportunities for team members to contribute to our projects and shine in new areas.

We actively participate in conversations and engage with team members from across the organisation.



### Accountability

We take responsibility for our actions and deliver on our promises.

We always strive to reach our goals and bring people on the journey with us.



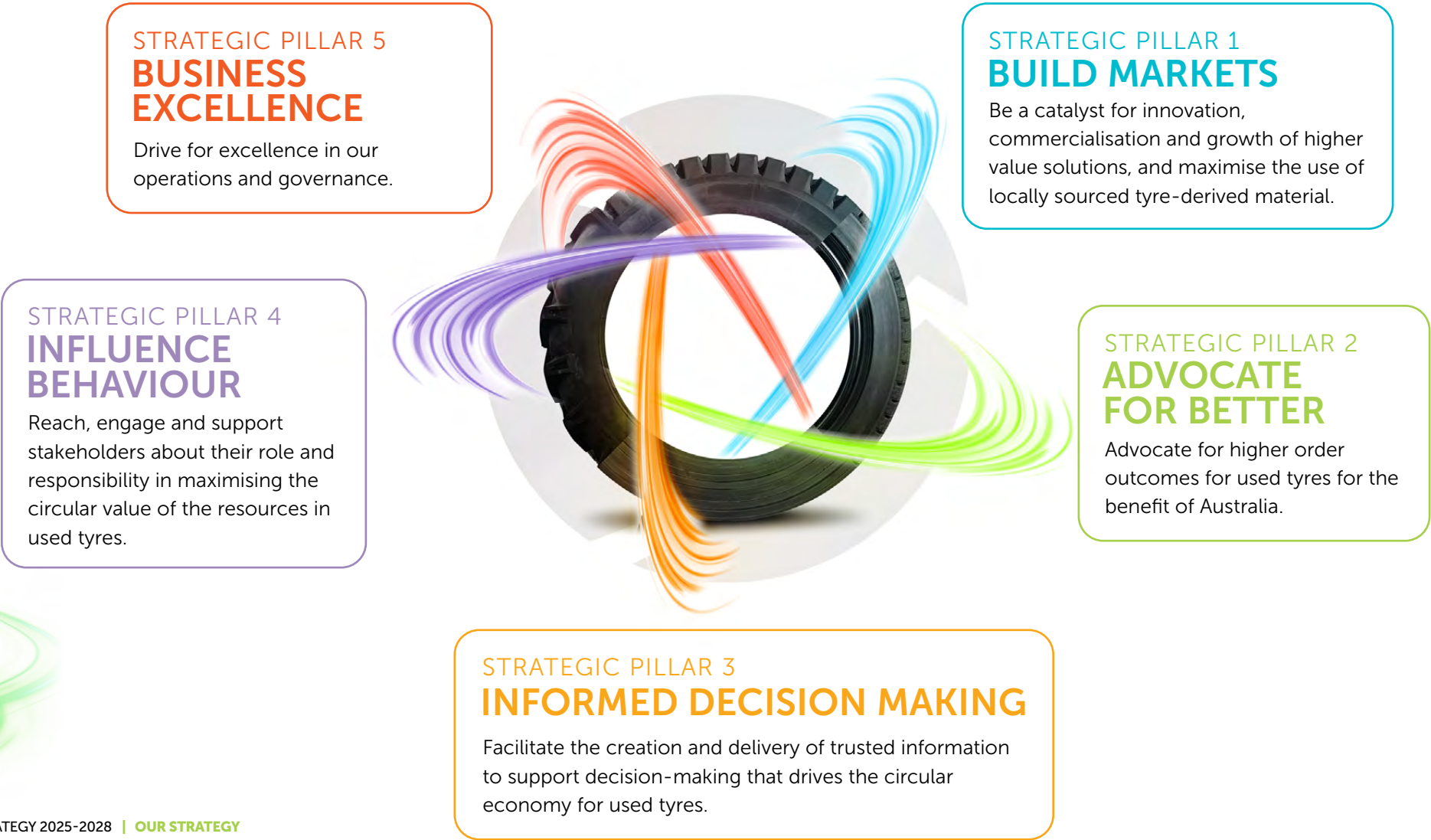
### Integrity, authenticity and trust

We show up to work in a way that is authentic and honest.

We treat information and our relationships with each other carefully and respectfully.

# Our Five Strategic Pillars

Our five strategic pillars define TSA’s functions, helping us to achieve our eight objectives and accomplish our mission.



# Our Objectives

Our eight objectives focus our resources and effort on priority activities to achieve our mission.

Objective	Explanation
1 Increase Bulk Market Uptake	Increase uptake of Australian tyre-derived material in bulk markets including roads, infrastructure and local tyre-derived fuel.
2 Reduce Tyre-Derived Material Imports	Reduce reliance on imported tyre-derived material.
3 Improve Off-the-Road Recovery Rate	Collaborate with the mining and agriculture sectors to improve circular outcomes and overall recovery rates for Off-the-Road tyres and conveyor belts.
4 National Mandatory Scheme For Tyres	Build an alliance for an 'all-in' scheme for tyres, strengthened by changes to associated policies, regulations and laws.
5 Strengthen Voluntary Scheme	Design, in collaboration with industry and stakeholders, stronger scheme guidelines within the current voluntary framework, regulation, policies and laws.
6 Increase Scheme Participant Engagement	Design and implement engagement plans for recyclers, auto brands, retailers, fleet and contributors.
7 Build Public Trust and Support	Support consumers to prefer TSA accredited retailers and contributing brands, and an all-in stewardship scheme for tyres.
8 Breakthrough R&D and Investment	Identify, deliver and share research and development that delivers high impact outcomes.

Pillars

BUILD MARKETS

ADVOCATE FOR BETTER

INFORMED DECISION MAKING

INFLUENCE BEHAVIOUR

BUSINESS EXCELLENCE





## Objective 01

# Increase Bulk Market Uptake

**Aim:** Increase uptake of Australian tyre-derived material in bulk markets including roads, infrastructure and local tyre-derived fuel.

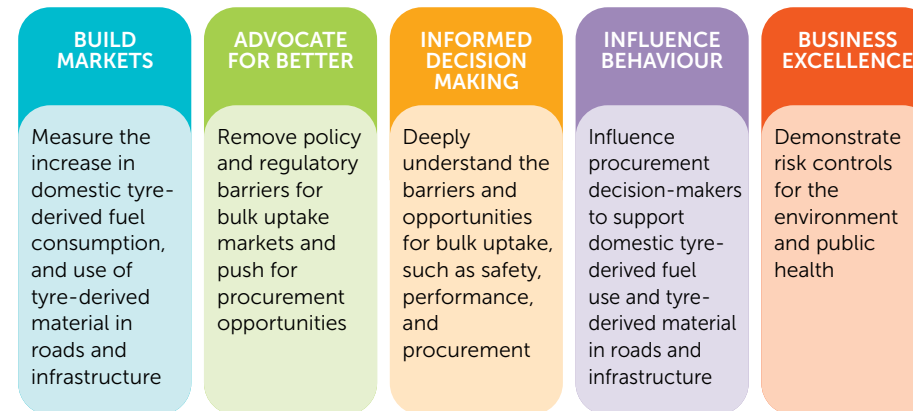
Large and consistent end markets are critical to consume the giant quantities of end-of-life tyres Australia produces each year.

The domestic end markets with the most potential to uptake significant volumes of tyre-derived material are: crumb rubber in roads and infrastructure, and to redirect shredded 'tyre-derived fuel' that is currently exported to Australian applications such as cement kilns, where it may reduce carbon emissions relative to burning coal.

If Australia used 15% crumb rubber in all roads, we would give a second life to about 40% of all end-of-life tyres generated.<sup>1</sup> Importantly, using crumb rubber in roads makes the roads perform better, last longer and more sustainable.

Focusing on increasing the bulk market uptake in Australia prepares the market for future increases in resource recovery, especially of Off-the-Road tyres.

### We will achieve this by:



<sup>1</sup> TSA, 2024, Tyre-derived Crumb Rubber in road surfacing applications in Australia. <https://www.tyrestewardship.org.au/tools-and-resources/crumb-rubber-in-roads> Accessed 8 July 2025.



## Objective 02

# Reduce Tyre-Derived Material Imports

**Aim:** Reduce reliance on imported tyre-derived material.

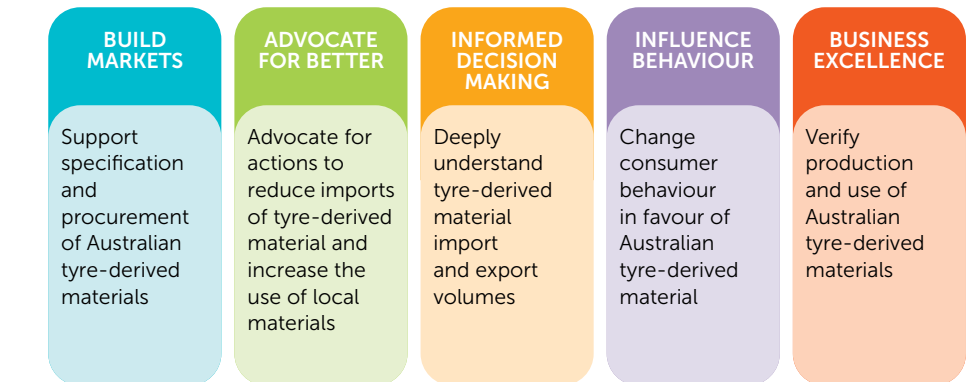
Tyre-derived material is traded internationally as a recycled material of value. Currently, imported tyre-derived material is often out-competing locally-produced material.

This is occurring for a range of reasons. For example, in parts of the world, product stewardship or 'extended producer responsibility' schemes may provide incentives and subsidies to stimulate markets, resulting in lower production prices. In other places, production costs for tyre-derived material may be low due to lower operating costs or lax environmental laws.

As tyre consumption and recycling grows globally, it is important that Australian tyre-derived material is competitive internationally, on price, quality and consistency, and it is preferred in Australia and overseas.

Focusing on this objective ensures that Australian tyre-derived material is world-class and can out compete imports.

### We will achieve this by:







### Objective 03

## Improve Off-the-Road Recovery Rate

**Aim:** Collaborate with the mining and agriculture sectors to improve circular outcomes and overall recovery rates for Off-the-Road tyres and conveyor belts.

Australia's mining and agricultural sectors are renowned internationally for their economic success. This success brings with it reasonable public expectations for environmental and social responsibility.

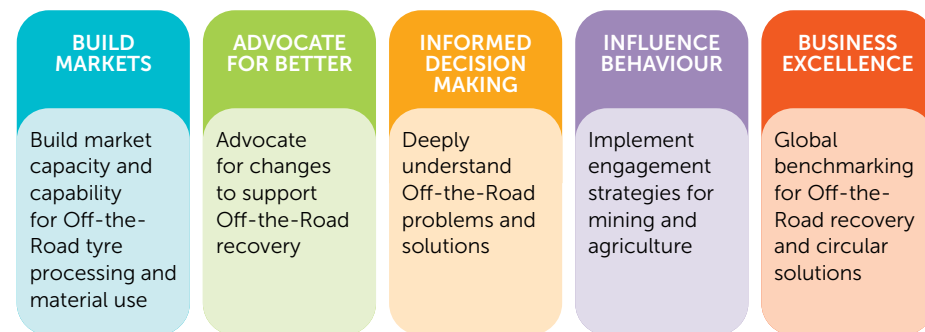
A critical yet often overlooked component of these sectors' operations is their use of Off-the-Road tyres, tracks, and conveyor belts. These Off-the-Road rubber products are essential for operations, yet the resource recovery rate is extremely poor. For mining, less than 5%<sup>2</sup> of their end-of-life tyres are recovered, with the majority buried onsite at mines.

Off-the-Road tyres contain a high proportion of valued natural rubber, and a range of options are available to recover them.

Furthermore, retreading and repairing high-value Off-the-Road tyres is not as common in Australia as it is overseas. Australia is a major global consumer of these tyres and needs a re-use industry comparable with similar mining jurisdictions such as Canada and Chile.

Focusing on this objective involves working with the mining and agricultural sectors and other stakeholders to overcome the barriers to recovery and circularity.

#### We will achieve this by:



<sup>2</sup> TSA, 2025, Material Flow Analysis Report 2023-24. <https://www.tyrestewardship.org.au/tools-and-resources/material-flow-analysis-report-2023-24> Accessed 8 July 2025.



### Objective 04

## National Mandatory Scheme for Tyres

**Aim:** Build an alliance for an 'all-in' scheme for tyres, strengthened by changes to associated policies, regulations and laws.

Future success in tyre stewardship in Australia depends on a national, mandatory product stewardship scheme for tyres.

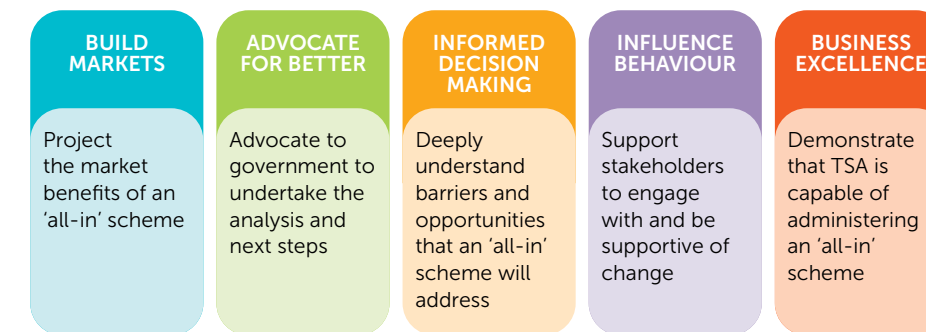
A mandatory scheme would:

- ensure that all tyre and vehicle importers contribute and are accountable
- boost investment in innovation and end-market development
- help achieve the government's objectives, including those relating to productivity, the circular economy, and the drive to net-zero emissions.

Australia's tyre industry supports mandatory participation for importers because the current voluntary arrangement disadvantages those that do contribute. A level-playing field is both wanted and needed. It will put an end to free-riders and provide the policy settings required to attract investment.

Focusing on this objective involves advocating to government to do the cost-benefit analysis and other work needed to prove the case for and design a mandatory scheme. The Scheme must be designed in collaboration with industry and stakeholders with the experience and expertise of what will work in the Australia context.

#### We will achieve this by:





## Objective 05

# Strengthen Voluntary Scheme

**Aim:** Design, in collaboration with industry and stakeholders, stronger scheme guidelines within the current voluntary framework, regulation, policies and laws.

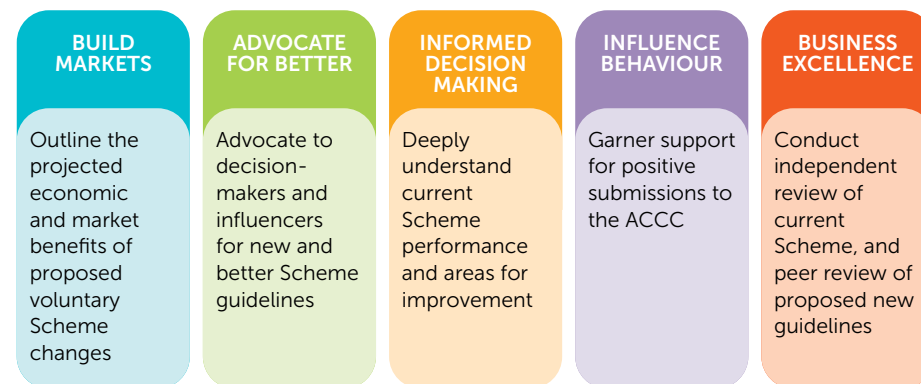
The Scheme Guidelines have remained largely unchanged since their last major update in 2018. With the current ACCC authorisation valid until September 2027, there is now a valuable opportunity to reflect on what has worked well and to identify what will improve and strengthen the Scheme.

This period of review will involve industry consultation, an independent review, and an analysis of the benefits associated with any proposed changes. It will include public consultation on revised Scheme Guidelines, followed by a formal submission to the ACCC, who will then conduct its own consultation process for TSA's re-authorisation.

The goal is to strengthen the voluntary scheme as a stepping stone toward a future mandatory scheme that ensures all importers contribute.

By focusing on this objective, the next ACCC re-authorisation application will be grounded in evidence and aligned with the interim needs of the industry - laying the foundation for more significant, long-term change.

### We will achieve this by:



## Objective 06

# Increase Scheme Participant Engagement

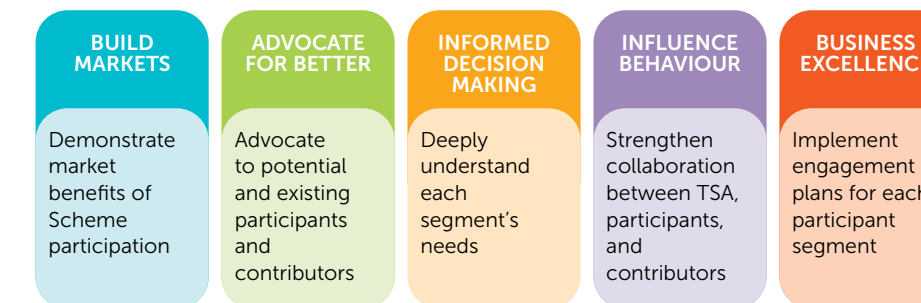
**Aim:** Design and implement engagement plans for recyclers, auto brands, retailers, fleet and contributors.

The Scheme is only as strong as its participants. The voluntary nature and relative newness of the Scheme, means that we continuously need to increase participation, engage with participants, and demonstrate value.

Australia has a strong, dedicated, enthusiastic tyre industry, and by working together, listening to each other, sharing knowledge, and discussing and developing shared positions, we can provide a louder voice to government and better engagement with each other.

Focusing on this objective will include TSA developing and implementing engagement plans for each participant sector.

### We will achieve this by:







## Objective 07

# Build Public Trust and Support

Aim: Support consumers to prefer TSA accredited retailers and contributing brands, and an all-in stewardship scheme for tyres.

Every Australian relies on tyres, yet few know what happens to them at the end of their life. Many are surprised to learn that most used tyres are either exported as fuel or buried locally, rather than being recycled or re-used as they might expect.

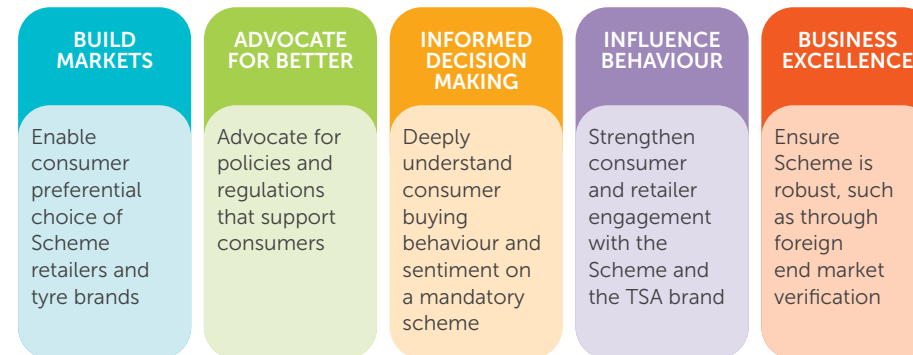
This gap in understanding presents a major opportunity to better engage with the public - making more sustainable purchasing decisions, building trust in the Scheme and supporting a transition to mandatory product stewardship. While we believe current outcomes fall short of public expectations, this is something we need to assess and measure more thoroughly.

Efforts to strengthen public engagement include:

- helping consumers choose TSA contributor brands, from TSA-accredited retailers
- supporting informed purchasing decisions through education and other initiatives
- empowering the public to advocate for positive change.

Focusing on this objective, TSA will grow a more informed and engaged community - one that supports stronger, more responsible product stewardship for tyres.

### We will achieve this by:



## Objective 08

# Breakthrough Research & Development and Investment

Aim: Identify, deliver and share research and development that delivers high impact outcomes.

Funding research and development (R&D) is a cornerstone of TSA's strategy. It plays a critical role in driving innovation and expanding the use of tyre-derived material in the domestic construction of resilient civil infrastructure, and in advanced manufacturing for global markets.

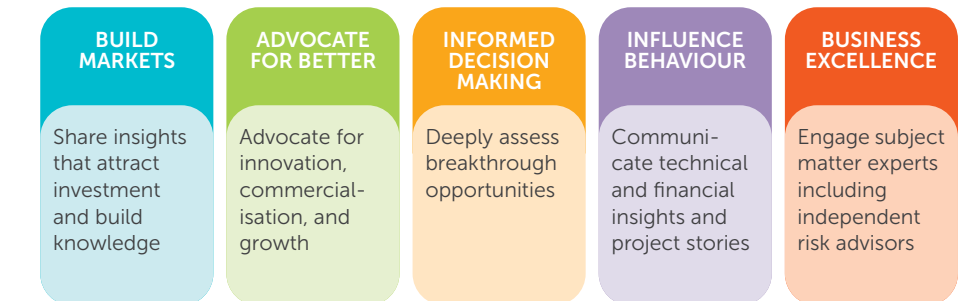
By funding R&D and openly sharing the results at no cost, TSA delivers public value to the entire tyre industry, including small and medium-sized enterprises.

This 'collective intelligence' model helps make Australia's tyre recovery sector smarter, more innovative and resilient. Over time creating future jobs, boosting investment confidence and productivity and supporting long-term prosperity.

Product stewardship supports national priorities and helps grow existing and new industries. Our focus in this area includes:

- reviewing our R&D investments to ensure they deliver commercial impact
- sharing insights and outcomes, and collaborating with industry
- advocating for continued support from government.

### We will achieve this by:





# Connecting our Work to the UN Sustainable Development Goals



The United Nations' launched its Sustainable Development Goals (SDGs) in 2015. All 193 UN-member governments including Australia agreed to them.

The SDG sets 17 global goals in an action plan to 2030 to address poverty and inequality and protect the planet. TSA's efforts to increase tyre recovery, improve data, and contribute to a circular economy for end-of-life tyres directly addresses five of the 17 goals.



**GOAL 8** - Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

**Our role:**

- TSA's market development initiatives support investment and job growth, particularly in regional and remote areas.
- Promoting sustainable and productive uses for end-of-life tyres helps support a decoupling of economic growth from environmental degradation.
- End destinations of Australia's used tyres can be third-party audited to verify they meet environmental, social and human health standards, including modern slavery, using TSA's foreign end market verification program.



**GOAL 9** - Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation

**Our role:**

- TSA funds research and development, encouraging innovation and supporting growth in environmentally sustainable industries.
- End-of-life tyres are used in a variety of applications such as roads, civil infrastructure and advanced manufacturing. TSA is working with relevant agencies to support increasing the amount of tyre-derived products that can be used in existing applications and finding new applications.
- TSA actively connects the Australian industry with global innovation and technology for tyre processing, reuse and advanced manufacturing.



**GOAL 12** - Ensure sustainable consumption and production patterns

**Our role:**

- TSA's vision and mission are fully aligned with Goal 12.
- TSA encourages organisations along the waste tyre value chain to adopt sustainable practices, and its accreditation program verifies participants' continued commitment.
- TSA promotes public, commercial and government procurement practices that support the use of end-of-life tyres in existing and new markets.



**GOAL 13** - Take urgent action to combat climate change and its impacts.

**Our role:**

- TSA market development and research encourages the principles of a circularity and higher-order outcomes for end-of-life tyres.
- TSA supports the use of tyre-derived fuel to offset the mining of traditional fuel sources.
- TSA supports research and innovation into new thermal processing of tyres, with the aim to drive alternative fuel sources to fossil fuels.



**GOAL 17** - Strengthen the means of implementation and revitalise the global partnership for sustainable development.

**Our role:**

- TSA facilitates collaboration across the end-of-life tyre value chain to support sustainable outcomes.
- TSA invests in and partners with research organisations to drive innovation in productive uses for end-of-life tyres.
- TSA is engaged with similar organisations around the world, seeking to share knowledge and foster global cooperation.
- Foreign end market collaborations create a global circular economy for end-of-life tyres.





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