WHERE DOES YOUR FLEET STAND?

WHAT 420 FLEETS REVEAL
ABOUT **BUYING, SERVICING AND OUTSOURCING TIRES**





MICHELIN

Most fleet managers know their own tire program inside and out. They know which brands they run, which dealer they call and how much of the work their shop handles. What they rarely see is how their program compares with everyone else's.

That comparison matters. Tires are one of a fleet's largest operating costs, and the way a fleet buys and services them shapes uptime, technician workload, and budget predictability. A fleet can make sound decisions year after year and still fall behind peers that have quietly changed how they manage tires. In 2026, Michelin Fleet Solutions surveyed 420 fleet managers, owners, and tire purchase decision-makers across the United States and Canada. The study asked how fleets choose tires, how they handle tire service, and how they view outsourcing that work. The answers show an industry further along in rethinking tire management than many fleets may realize.

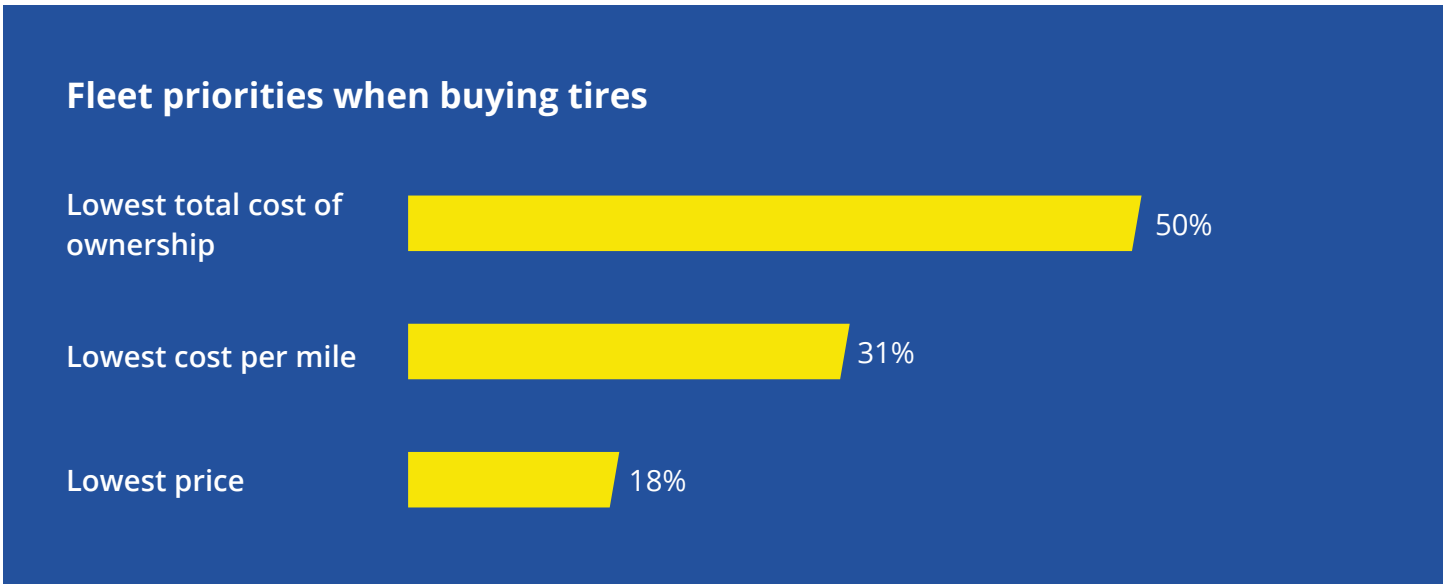
The findings that follow offer a benchmark. Use them to see where your fleet stands and where it might be leaving value on the table.



TIRE SERVICE DRIVES TOTAL COST OF OWNERSHIP

Price matters to every fleet. But when asked what matters most when deciding which tires to buy, most fleets looked beyond the number on the invoice. Just over half (51%) chose lowest total cost of ownership, which factors in longevity, fuel efficiency, and maintenance implications. Another 31% chose lowest cost per mile, which weighs price against how long a tire lasts. Only 18% chose lowest price alone. In other words, 82% of fleets weigh price as part of what a tire delivers over its life.

The pattern holds when fleets rate individual factors. Tire life and longevity topped the list, with 62% calling it extremely important. Traction and grip when new and worn (50%), retreadability (49%), fuel efficiency (48%), and robustness in tough environments (46%) followed. Brand reputation (40%), price (31%), warranty (29%), and casing resale value (16%) rounded out the list.



Getting that lifetime value takes more than buying the right tire. Tire service is essential to maximizing a tire's total cost of ownership. "The level of service is critical," says Nikki Nordhus, Director of Operations at Michelin Fleet Solutions. "We provide white-glove service. Sometimes it matters even more to know you have a partner you can depend on and that your fleet is well cared for and well maintained. Our goal is to keep your entire tire program well maintained and operating efficiently."

The stakes are high. "Tires are a fleet's third-largest cost," Nordhus says, behind labor and fuel. Total cost of ownership is easy to prioritize but hard to manage. Longevity depends on a well-maintained, proactive tire program built around the Critical 6 components of proper tire maintenance:

1. Low air pressure
2. High air pressure
3. Missing valve caps
4. Irregular tread wear
5. Mismatched tread depth
6. Mismatched air pressure

Making sure these are consistently checked and corrected is the job of a well-maintained tire program. A premium tire that runs underinflated or comes off too early loses much of the value it was bought for. The fleets that capture full lifecycle value manage the tire every day after it is mounted, not only on the day it is purchased.

The Critical 6 checklist

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HOW A FLEET MAINTAINS ITS TIRES CAN MATTER AS MUCH AS WHICH TIRES IT BUYS

When fleets change their primary tire brand, perceived performance is usually the reason. Among respondents who had switched, 34% ranked tire longevity and reliability as the top factor, and 23% ranked fuel efficiency first. Lower pricing or discounts came in a distant third, at 12%, followed by tire availability (8%) and a better warranty (5%).

Price still plays a role for some. Fleets that switched brands were more likely than others to name lowest price as their top buying priority (27% versus 16%). Yet even in this group, the deciding factor was how the tires performed.



But poor performance isn't always the tire's fault. In many cases, the tire would have performed just fine if it had been properly maintained. When a lack of maintenance is mistaken for poor performance, it can lead to an unnecessary brand change. Without a clear understanding of proper maintenance practices, fleets risk making uninformed or short-sighted decisions that don't fix the real problem.

Underinflation, missed inspections, and misalignment can shorten tire life on any brand. Each of the Critical 6 directly affects how a tire performs. And these problems are easy to miss for a shop that doesn't specialize in tires.

A tire specialist knows what to look for. “If there are alignment issues, we can spot them quickly,” Nordhus says. Timing matters too. If a truck is about to head out for several weeks, “it may make sense to address the issue now,” she says. Catching problems early also helps prevent downtime and costly Emergency Roadside Service (ERS) calls.

The takeaway: before changing brands, make sure your tires are being properly maintained.

PUTTING TECHNICIANS WHERE THEY MATTER MOST

The survey asked current users and interested fleets why they would choose an outsourced tire program. The top answer, at 32%, was reducing the operational burden by getting full tire services from quality providers. Improved cash flow from predictable monthly costs instead of large up-front purchases followed at 24%. Guaranteed tire availability (13%), on-site service (7%), and easier billing (6%) rounded out the list.

That operational burden is closely tied to one of the industry’s most persistent problems: finding and keeping skilled technicians. Nordhus sees the same pattern in shop after shop. “Many shops have their highly paid diesel mechanics handling tire work as well,” she says. “Outsourcing frees them to focus on higher-value work. Tire work matters, but it isn’t as technical as working on a diesel engine.”

Outsourcing tire service is not about cutting labor. It is about making better use of the labor a fleet already has. When tire specialists take over tire work, the fleet no longer must recruit, train, and schedule its own people for it. “We handle the tire work, so they don’t have to hire staff to do it,” Nordhus says.

It also puts tire work in the hands of people who do nothing else. “We’re trained in tire service—it’s our specialty,” Nordhus says. Michelin Fleet Solutions technicians hold Tire Industry Association certifications and work within DOT and FMCSA guidelines. “You avoid the issues that arise when tire work is handled by someone who rarely does it.”

Fleets that have made the shift see the difference. “Our successful tire program is due to our partnership with Michelin,” says Alex Romero, Director of Maintenance at Tornado Bus Company. “The MFS program simplifies tire procurement and management so I can focus on my business operations.”



Top reasons fleets give for outsourcing tires: reducing the operational burden (32%) and improving cash flow (24%).

NEARLY HALF ARE INTERESTED. HERE'S WHAT HOLDS THE REST BACK.

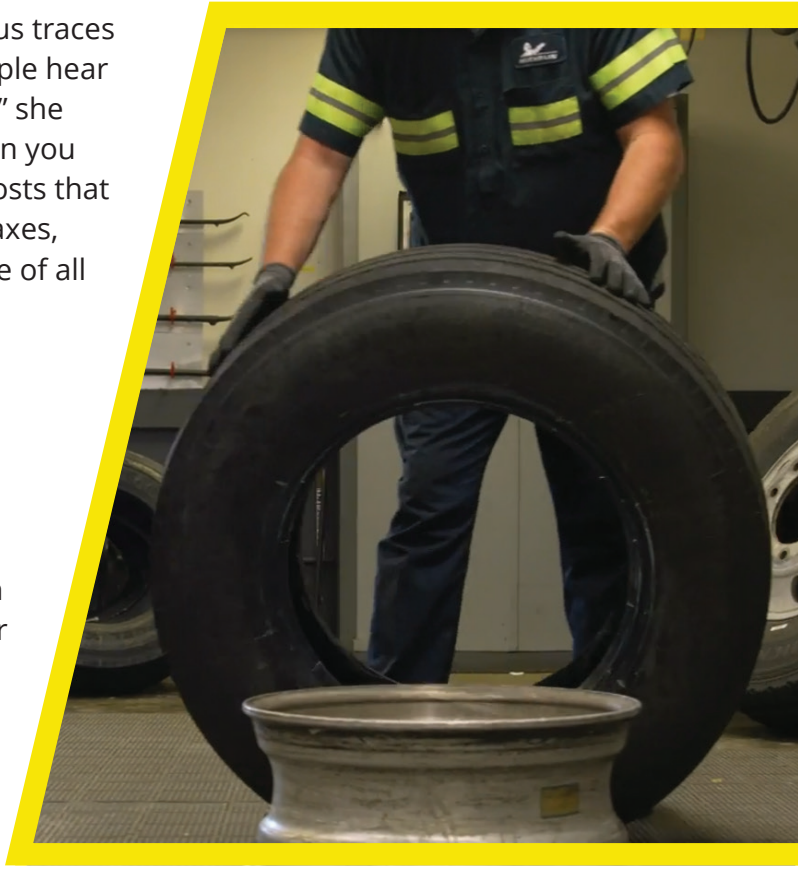
Among fleets not already using one, 47% said they were interested in a tire leasing program, the survey's term for what Michelin calls tires as a service. That is a striking level of openness to a model many fleets have never tried. It suggests a large share of the industry is weighing change, even if it has not yet acted.
[Stat box:] 47% of fleets not using an outsourced tire program say they are interested in one.
Fleets that were not interested gave clear reasons, and each deserves a direct answer.

"We prefer to own our tires outright" (37%). Ownership is not the obstacle it appears to be. Fleets still own their tires, but they can now pay for them over time instead of all upfront, turning tires into an operating expense rather than a capital expense. "That's perfectly fine. You can still own your tires," Nordhus says. "We'll care for them as if they were our own." Michelin can own them as well, however, if that's what the fleet prefers.

Often, the deeper concern is control. "It isn't that fleets misunderstand outsourcing. They just don't like giving up control," Nordhus says. "It's hard for people to let go of control." That is human nature. But handing tire work to a specialist does not mean handing over the fleet's standards. It means someone else does the work to meet them.



“It feels more expensive in the long run” (26%). Nordhus traces this perception to the word “leasing” itself. “When people hear the word ‘lease,’ they tend to assume it will cost more,” she says. “The upfront cost may be higher at first. But when you outsource everything, you eliminate many back-end costs that fleets often overlook, including administrative costs, taxes, scrap costs, and other ancillary expenses. We take care of all of it, including damages.”



Billing gets simpler too. In a typical in-house program, every tire order, retread and service call generates its own invoice, often from multiple vendors. “Every time you order a tire, you get another bill. Every time you order a retread, you get another bill,” Nordhus says. With Michelin Fleet Solutions, those multiple bills from multiple vendors become one. “You receive one bill for everything,” she says. “That makes a huge difference for budgeting and cash flow.”

The program also gets more out of every tire. “We pride ourselves on squeezing every bit of value out of every tire,” Nordhus says. “That’s a major differentiator in our industry. I challenge any fleet that hasn’t outsourced its tire program to match it.”

Retreading stretches that value further. “Retreads are typically more economical than new tires,” Nordhus says. “We can take the existing casings in a fleet, retread them and bring them back to life.”

“We have a trusted tire dealer or provider” (14%). Strong relationships are worth valuing, and switching can feel risky. Michelin Fleet Solutions recently onboarded three fleets that came from other providers, and their experience shows those fears are unfounded. “They were hesitant because they didn’t like change, and they were understandably anxious,” Nordhus says. “All three told us it has been the best experience they’ve had. They expected to run short on tires. They expected that we wouldn’t know what they needed. We proved those worries were unnecessary.”

Her invitation to fleets that are still unsure: “Let us show you what we can do and the level of service we provide.”

“We don’t drive enough miles” (6%) and “concerned about hidden fees or terms” (5%). A program should match how a fleet actually operates. Fit depends on how often vehicles return home, not on mileage. And every cost is spelled out before the fleet signs.

WHERE DOES YOUR FLEET STAND?

These questions, drawn from the survey findings, can help you benchmark your own tire program against your peers.

- Do you know your true tire cost per mile, including labor, downtime, scrap and administration, or only your purchase price?
- Is someone checking the Critical 6 on every vehicle: low and high air pressure, missing valve caps, irregular tread wear, mismatched tread depth and mismatched air pressure?
- Before your last brand change, did you rule out maintenance as the cause of poor tire performance?
- Are you getting every bit of value out of your tires and casings before they come off?
- Are your diesel technicians spending time on tire work that could go to mechanical repairs and preventive maintenance?
- How many tire-related invoices, from how many vendors, does your fleet process each month?
- Can you predict your tire spending month to month, or does it arrive in spikes?

If several of these questions gave you pause, you are not alone. They are the same issues leading many fleets to rethink how their tires are managed.



HOW MICHELIN FLEET SOLUTIONS WORKS

Michelin Fleet Solutions is an outsourced tire solution, or tires as a service, built around how each fleet operates.

- Full service. “We take over your tire shop,” Nordhus says. “We order, maintain, inspect, mount, dismount, install, repair, and retread your tires. We handle everything. You don’t have to think about tires, and you receive one bill.”
- Tires only. “You get priority access to tire supply.”

Nordhus’s own preference is clear. “If it were my fleet, I would outsource everything,” she says. “Personally, I outsource as much as I can.”

The results can be eye-opening. One fleet realized its own in-house tire service was falling short. It then outsourced its tire service to Michelin Fleet Solutions and gave it more business. “They saw that we could do it better than they could themselves,” Nordhus says. “That says a lot about the value we deliver.”

“AT FIRST, I WAS HESITANT, BUT ONCE I UNDERSTOOD IT, IT MADE TOTAL SENSE. IT’S SIMPLE, SAVES US MONEY, AND I STRONGLY RECOMMEND IT.”

— Alex Romero, Director of Maintenance, Tornado Bus Company

TAKE THE FIRST STEP

The survey shows where the industry is heading. Most fleets weigh price against total cost of ownership, and tire service is what maximizes it. Proper maintenance, not the brand, often decides how a tire performs. And nearly half of fleets not yet using an outsourced tire program are open to one. The question is where your fleet stands.

“Leave the work to the experts,” Nordhus says. “Focus on what you do best, delivering for your customers, and let us focus on the tires.”

Her advice for fleet managers still on the fence is simple. “Don’t hesitate to pick up the phone and call,” she says. “More information is never a bad thing. Ask questions, learn more and reach out.”