TIRE MARKET PROFILE

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Retail, commercial or wholesale, it's hard to hit a moving target. With all of the shifts and changes and re-directions we've witnessed during the last 15 years, it's little wonder anyone can stay ahead of the curve. To help steady the target, we've complied this comprehensive Tire Market Profile.

Combining real-world data from a range of resources with results from Tire Review's annual Tire Dealer Profile, our editors' estimates on marketshares, and research from key associations and the U.S. government, this section will help you gain a better perspective of our industry, help you see emerging trends, and prepare your business for the road ahead.

Through painstaking research, we've been able to assemble this collection of data, which includes: the top 25 global tiremakers; tire import data; dealer channel brand marketshares; tire shipments by segment; a look at the OE and replacement high performance tire markets; a rundown on the most popular tire sizes at OE and replacement; brand and distribution channel segmentation; new vehicle sales; vehicle registrations; miles driven by vehicle type and much, much more.

Tire Review's Dealer Profile Study is our annual survey of hundreds of independent tire dealers throughout North America, who offered their insights on the structure and size and operations of today's tire dealer, including a look at tire pricing levels, buying patterns, average gross margins, and much more.

Top 25 GLOBAL TIRE MANUFACTURERS – 2013

[Note: Sales figures are from corporate financial reports and estimates. Amounts shown here are for all revenue from all sources, including non-tire business. All figures in millions, U.S. dollars.]

Company	Country	2011 Sales	2012 Sales
Continental AG	Germany	$40,600	$43,161
Bridgestone Corp.	Japan	$38,903	$35,110
Groupe Michelin	France	$26,829	$28,312
Goodyear Tire & Rubber Co.	U.S.	$22,800	$21,000
Sumitomo Rubber Industries Ltd.	Japan	$8,732	$9,364
Pirelli & C SpA	Italy	$7,323	$8,006
Hankook Tire Co.	South Korea	$5,841	$6,600
Yokohama Rubber Corp.	Japan	$5,467*	$6,465
Cheng Shin Rubber/Maxxis	Taiwan	$3,479	$4,500
Cooper Tire & Rubber Co.	U.S.	$3,900	$4,201
Giti Tire (China) Investment Co.	China	$2,890	$3,982
Hangzhou Zhongce Rubber Co.	China	$3,520	$3,884
Kumho Tire Co.	South Korea	$3,677	$3,822
Toyo Tire & Rubber Co.	Japan	$3,794	$3,362
Triangle Group Co.	China	$2,520	$2,526
Apollo Tyres Ltd.	India	$2,224	$2,504
MRF Ltd.	India	$1,947	$2,267
Nokian Tyres plc	Finland	$1,886	$2,126
Double Coin Holdings Ltd.	China	$1,560	$1,964
Shandong Linglong Rubber Co.	China	$1,700	$1,866
Titan International	U.S.	$1,487	$1,821
Xingyuan Tyre Co.	China	$1,350	$1,563
Nexen Tire Corp.	South Korea	$1,201	$1,544
Aeolus Tyre Co.	China	$1,580	$1,465
Qingdao Doublestar Industrial Co.	China	$1,310	$1,462

(*Company shifted to calendar fiscal year; results reflect nine months of activity)

Dealer Channel Brand Marketshare

P-METRIC TIRES

2012 RMA Replacement Shipments: 191.4 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.45%	Continental	2.50%	Nitto	1.35%
Michelin	8.85%	Kumho	2.50%	GT Radial	1.25%
Firestone	8.10%	Uniroyal	2.35%	Kelly	1.15%
Bridgestone	7.75%	Dunlop	1.95%	Sumitomo	0.95%
Cooper	4.90%	Hercules	1.90%	Big O	0.85%
BFGoodrich	4.75%	Mastercraft	1.90%	**Others**	**10.75%**
General	3.45%	Falken	1.85%		
Hankook	3.10%	Nexen	1.75%		
Yokohama	2.95%	Pirelli	1.55%		
Toyo	2.60%	Cordovan	1.50%		
Multi-Mile	2.55%	Delta	1.50%		

LT-METRIC TIRES

2012 RMA Replacement Shipments: 28.0 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	11.20%	Mastercraft	2.55%	Kelly	1.40%
BFGoodrich	8.80%	Continental	2.45%	Hercules	1.10%
Bridgestone	7.20%	Hankook	2.40%	Nexen	1.10%
Michelin	7.20%	Uniroyal	2.25%	Big O	0.95%
Firestone	6.90%	Cordovan	2.10%	Maxxis	0.95%
Cooper	6.60%	Falken	1.95%	Eldorado	0.85%
Multi-Mile	5.10%	Kumho	1.80%	Laramie	0.65%
General	5.05%	Delta	1.70%	National	0.65%
Yokohama	3.10%	Dunlop	1.70%	**Others**	**7.75%**
Toyo	3.05%	Pirelli	1.50%		

PERFORMANCE (H-RATED & ABOVE)

2012 RMA Replacement Shipments: 59.2 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.85%	Hankook	3.40%
Michelin	12.80%	Dunlop	3.20%
Bridgestone	8.90%	Continental	2.85%
Yokohama	7.70%	Cooper	2.45%
Falken	6.85%	General	1.95%
BFGoodrich	6.55%	Kelly	1.85%
Kumho	6.35%	Nexen	1.55%
Toyo	5.20%	Nitto	1.55%
Firestone	4.55%	Sumitomo	1.20%
Pirelli	3.60%	**Others**	**3.65%**

(Source: TR Estimates)

TIRE MARKET PROFILE

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SOURCEBOOK

Dealer Channel Brand Marketshare

MEDIUM TRUCK

2012 RMA Replacement Shipments: 15.9 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share
Michelin	17.05%
Bridgestone	15.85%
Goodyear	12.15%
Yokohama	8.75%
Firestone	7.60%
Continental	5.55%
Cooper/Roadmaster	4.10%
Hankook	3.85%
Double Coin	3.45%
Hercules	3.35%
General	3.30%
Dunlop	2.25%
BFGoodrich	2.05%
Toyo	2.05%
DynaTrak	1.95%
Kumho	1.15%
Sumitomo	1.05%
Gladiator	1.05%
Others	**3.45%**

OTR

2012 Industry Replacement Shipments: 189.04 thousand
(Shares Rounded to Nearest 0.05%)

Brand	Bias Share	Radial Share
Bridgestone	9.40%	37.80%
Firestone	26.15%	--
Michelin	--	27.60%
Goodyear	29.20%	23.65%
General	18.05%	--
Titan	8.30%	0.40%
Others	**8.90%**	**10.55%**

AGRICULTURAL

2012 Industry Replacement Shipments: 2.09 million
(Shares Rounded to Nearest 0.05%)

REAR TIRE SEGMENT

Brand	Bias Share	Radial Share
Firestone	36.65%	30.25%
Goodyear	15.55%	24.65%
Titan	14.25%	7.70%
Michelin	--	9.55%
Harvest King	3.35%	--
BKT	14.95%	10.05%
Alliance	4.35%	5.65%
Trelleborg	1.70%	2.05%
Others	**9.20%**	**10.10 %**

FRONT/IMPLEMENT SEGMENT

Brand	Dealer Share
Firestone	32.25%
Goodyear	18.95%
Titan	16.80%
BKT	12.10%
American Farmer	5.65%
Universal Co-Op	5.40%
Alliance	3.00%
Trelleborg	1.95%
Others	**3.90%**

(Source: RMA, TR Estimates)

TIRE MARKET PROFILE

2012 Tire Imports

P-METRIC TIRES

(millions of units)

Country	2012	2011	Y-o-Y Change	2012 Per Tire Value
China	29.37	22.38	32.4%	$37.44
South Korea	20.32	19.52	4.0%	$63.93
Canada	11.21	12.46	-10.1%	$72.01
Indonesia	9.80	10.23	-4.2%	$45.43
Thailand	9.60	7.87	22.0%	$52.34
Mexico	9.52	9.12	4.4%	$58.98
Japan	9.07	13.14	-30.9%	$82.81
Taiwan	5.70	5.04	12.3%	$37.63
Chile	4.38	2.96	47.9%	$65.35
Brazil	3.16	4.35	-19.2%	$72.58
Others	7.64	7.52	1.5%	$134.98
TOTAL	**119.77**	**114.59**	**4.3%**	**$65.77**

LT-METRIC TIRES

(millions of units)

Country	2012	2011	Y-o-Y Change	2012 Per Tire Value
Canada	9.45	8.75	8.0%	$86.43
China	3.00	2.95	1.8%	$67.86
South Korea	2.38	2.46	-3.2%	$91.39
Japan	1.59	2.28	-30.6%	$112.30
Thailand	1.49	1.48	0.7%	$98.04
Mexico	1.35	0.68	99.6%	$78.13
Vietnam	0.92	0.78	17.2%	$67.47
Taiwan	0.22	0.40	-44.9%	$96.18
Indonesia	0.19	0.36	-48.1%	$80.27
Chile	0.14	N/A	N/A	$96.28
Others	0.31	0.46	-33.2%	$116.24
TOTAL	**21.04**	**20.60**	**2.1%**	**$90.05**

MEDIUM TRUCK TIRES

(millions of units)

Country	2012	2011	Y-o-Y Change	2012 Per Tire Value
China	6.33	4.86	30.2%	$163.19
Canada	1.28	1.44	-11.0%	$275.51
Japan	0.97	1.13	-13.6%	$265.09
Thailand	0.70	1.56	-55.2%	$226.54
South Korea	0.30	0.23	31.0%	$277.43
United Kingdom	0.30	0.34	-12.0%	$245.38
Germany	0.19	0.20	-4.1%	$257.69
Spain	0.13	0.15	-13.1%	$273.87
Italy	0.09	0.07	34.4%	$354.28
France	0.08	0.14	-42.0%	$441.82
Others	0.19	0.16	18.2%	$256.23
TOTAL	**10.56**	**10.28**	**2.7%**	**$276.09**

(Source: U.S. Department of Commerce)

TIRE MARKET PROFILE

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SOURCEBOOK

2012 U.S. Tire Shipments

P-Metric
(millions of units)

Year	Replacement	OE
2008	195.10	37.60
2009	189.52	24.60
2010	201.30	33.10
2011	194.4	35.70
2012	191.4	40.0

(Source: RMA)

Winter
(millions of units)

Year	Replacement	OE
2008	9.50	1.00
2009	8.80	0.70
2010	8.70	1.10
2011	9.50	1.00
2012	7.20	1.20

(Source: RMA)

LT-Metric
(millions of units)

Year	Replacement	OE
2008	29.40	2.90
2009	27.48	2.79
2010	29.10	3.60
2011	28.60	4.20
2012	28.00	4.20

(Source: RMA)

Medium Truck
(millions of units)

Year	Replacement	OE	Retreads
2008	14.80	3.80	14.70
2009	12.88	2.42	13.85
2010	15.80	3.20	14.72
2011	16.50	4.90	15.30
2012	15.9	5.10	14.80

(Source: RMA & TR Estimates)

OTR
(thousands of units)

	Replacement		OE	
Year	Bias	Radial	Bias	Radial
2008	62.57	74.86	26.54	57.36
2009	53.18	63.63	22.82	49.33
2010	84.51	111.49	29.67	64.13
2011	84.74	113.36	31.46	66.32
2012	79.62	109.42	34.71	70.26

Ag/Forestry
(millions of units)

	Replacement		OE	
Year	F	R	F	R
2008	1.4	0.77	0.36	0.66
2009	1.3	0.63	0.38	0.55
2010	1.4	0.72	0.41	0.60
2011	1.5	0.74	0.44	0.65
2012	1.4	0.69	0.45	0.67

2012 Top Tire Sizes U.S.

Replacement P-Metric

Rank	Size	Share
1	205/55R16	2.9%
2	P235/75R15	2.7%
3	225/60R16	2.4%
4	215/60R16	2.4%
5	P225/60R16	2.2%
6	P215/60R16	2.2%
7	P265/70R17	2.2%
8	195/65R15	1.9%
9	195/60R15	1.9%
10	215/65R16	1.8%

OE P-Metric

Rank	Size	Share
1	P215/55R17	6.1%
2	P265/70R17	4.4%
3	P215/60R16	3.8%
4	P275/65R18	3.4%
5	P205/65R16	3.1%
6	P235/60R18	2.7%
7	P235/65R17	2.5%
8	P275/60R20	2.3%
9	215/55R17	2.2%
10	P205/55R16	2.1%

Replacement LT-Metric

Rank	Size	Share
1	LT245/75R16	14.8%
2	LT265/75R16	12.3%
3	LT265/70R17	9.8%
4	LT235/85R16	8.7%
5	LT225/75R16	7.7%
6	LT285/75R16	4.7%
7	31x10.50R15	4.0%
8	LT215/85R16	3.7%
9	LT245/75R17	3.4%
10	LT285/70R17	3.3%

OE LT-Metric

Rank	Size	Share
1	LT245/75R17	22.1%
2	LT245/75R16	14.7%
3	LT225/75R16	11.1%
4	LT265/70R18	8.1%
5	LT265/70R17	7.1%
6	LT275/65R18	6.9%
7	LT275/70R18	5.8%
8	LT235/80R17	4.7%
9	LT245/70R17	4.6%
10	LT275/65R20	3.9%

Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	27.7%
2	11R22.5	23.1%
3	11R24.5	11.0%
4	225/70R19.5	6.3%
5	285/75R24.5	6.0%

OE Medium Truck

Rank	Size	Share
1	295/75R22.5	35.5%
2	11R22.5	28.5%
3	11R24.5	9.5%
4	225/70R19.5	6.6%
5	315/80R22.5	2.2%

(Source: RMA)

TIRE MARKET PROFILE

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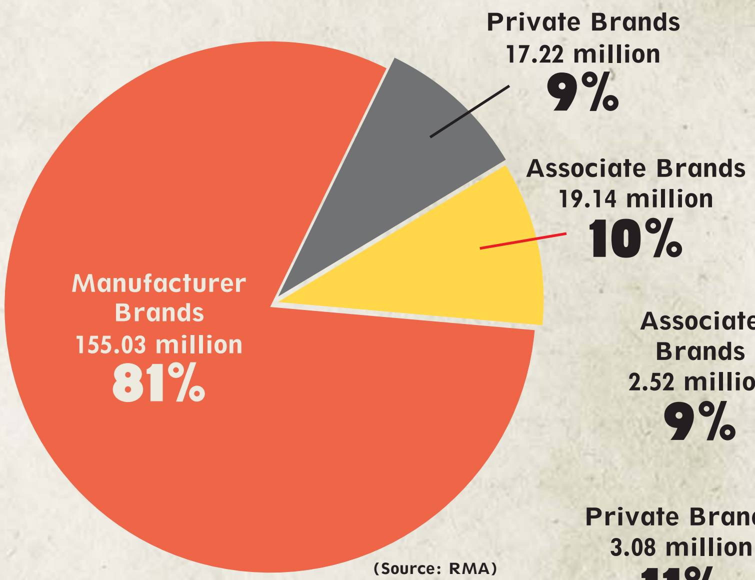
SOURCEBOOK

2012 U.S. Brand-Type Shares

P-METRIC REPLACEMENT

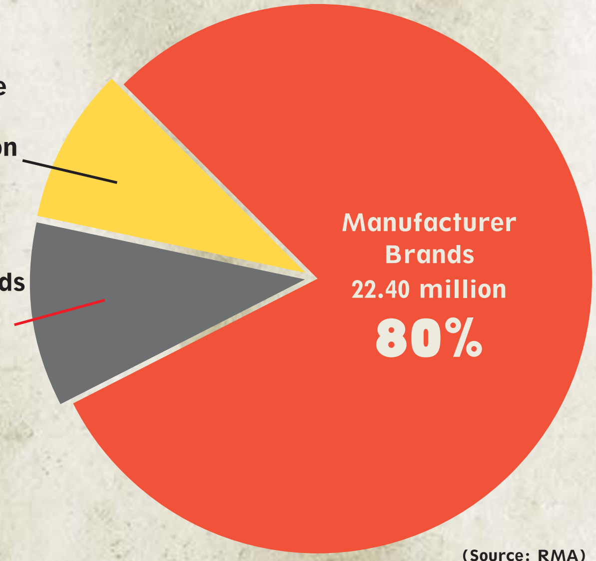
(191.4 million units shipped)



(Source: RMA)

LT-METRIC REPLACEMENT

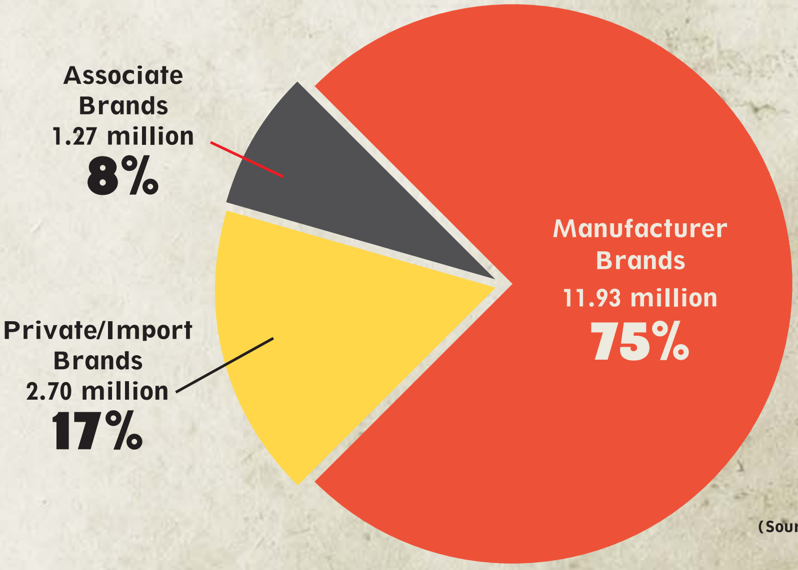
(28.0 million units shipped)



(Source: RMA)

MEDIUM TRUCK REPLACEMENT

(15.9 million units shipped)



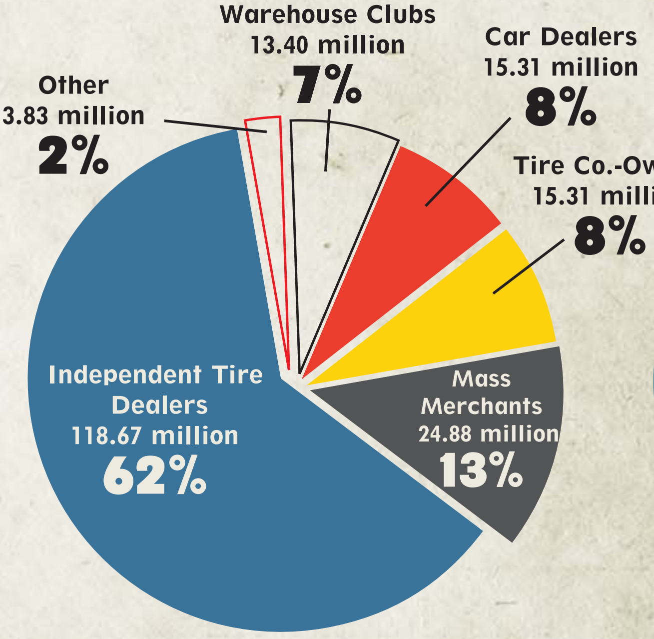
(Source: TR Estimates)

TIRE MARKET PROFILE

2012 U.S. Channel Shares

P-METRIC

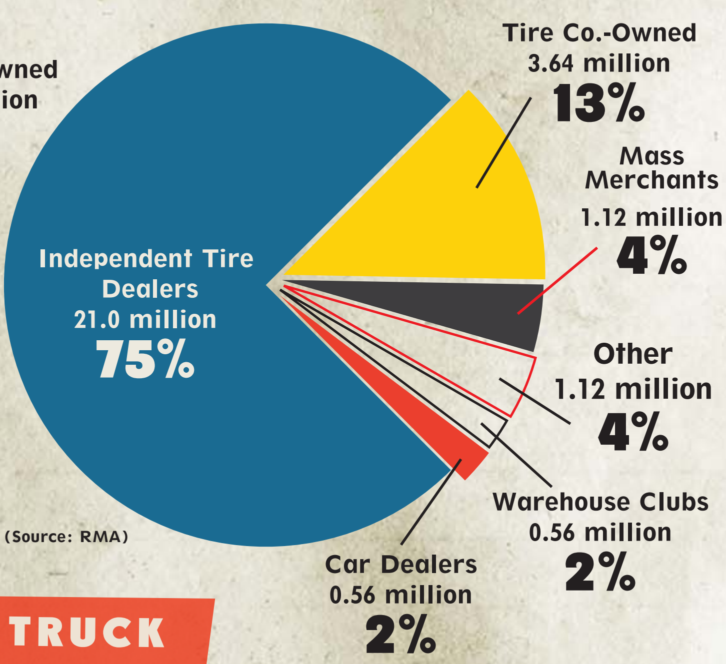
(191.4 millions of units shipped)



(Source: RMA)

LT-METRIC

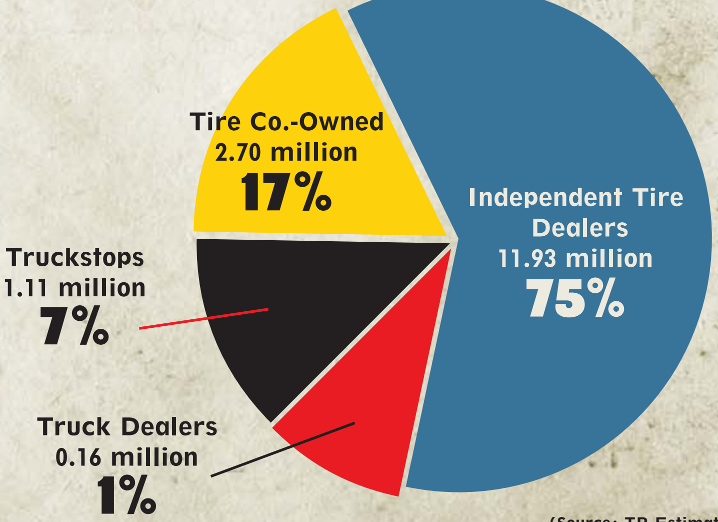
(28.0 millions of units shipped)



(Source: RMA)

MEDIUM TRUCK

(15.9 millions of units shipped)



(Source: TR Estimates)

TIRE MARKET PROFILE

2012 Canada Tire Shipments

P-METRIC

(million of units)

Year	Replacement	OE
2008	20.93	7.65
2009	19.22	6.00
2010	16.12	7.91
2011	15.91	8.40
2012	15.57	8.70

LT-METRIC

(million of units)

Year	Replacement	OE
2008	2.52	0.54
2009	2.75	0.10
2010	2.70	0.30
2011	2.87	0.31
2012	2.80	0.31

WINTER

(million of units)

Year	Replacement
2008	6.95
2009	7.55
2010	5.28
2011	4.93
2012	4.77

(Source: Rubber Association of Canada and TR Estimates)

HIGH PERFORMANCE

(million of units)

Year	Replacement
2008	2.55
2009	2.71
2010	3.11
2011	3.17
2012	3.23

MEDIUM TRUCK

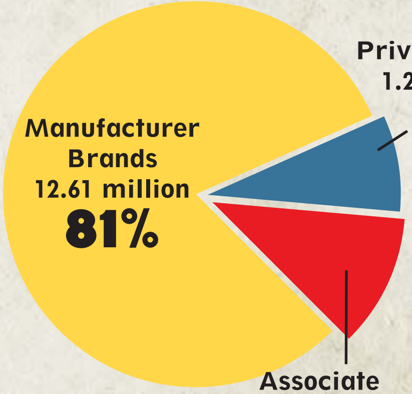
(million of units)

Year	Replacement	OE
2008	1.27	0.29
2009	1.36	0.13
2010	1.40	0.15
2011	1.52	0.20
2012	1.57	0.21

2012 Canada Brand-Type Shares

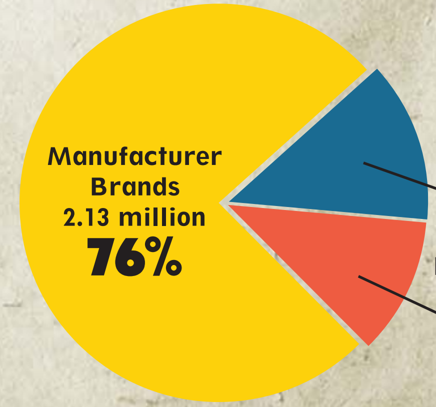
P-METRIC

15.57 million units shipped



LT-METRIC

2.80 million units shipped



MEDIUM TRUCK

1.57 million units shipped

(Source: TR Estimates)

TIRE MARKET PROFILE

Speed-Rated Tire Breakdown

OE MARKET

(% of total 2012 U.S. shipments/millions of units)

Year (Total OE)	H-Rated	V-Rated	Z-Rated	Other Speed Rated	% of OE (Total Units)
2007	11.7%	12.5%	3.1%	69.7%	96.8%
(46.3)	5.4	5.8	1.4	32.2	(44.8)
2008	13.8%	14.6%	3.7%	64.1%	96.3%
(37.6)	5.2	5.5	1.4	24.1	(36.2)
2009	15.0%	15.0%	2.4%	63.0%	95.5%
(24.6)	3.7	3.7	0.6	15.5	(23.5)
2010	17.9%	13.6%	2.8%	62.0%	96.1%
(33.1)	5.9	4.5	0.9	20.5	(31.8)
2011	23.0%	12.8%	2.3%	61.8%	100%
(34.3)	7.9	4.4	0.8	21.2	(34.3)
2012	27.8%	15.4%	2.6%	54.2%	100%
(38.2)	10.6	5.9	1.0	20.7	(38.2)

REPLACEMENT MARKET

(% of total 2012 U.S. shipments/millions of units)

Year (Total Replacement)	H-Rated	V-Rated	Z-Rated	Other Speed Rated	% of Replacement (Total Units)
2007	15.5%	5.0%	5.2%	55.3%	81.0%
(204.0)	31.6	10.2	10.6	112.9	(165.3)
2008	15.2%	5.5%	5.3%	53.8%	79.8%
(195.1)	29.7	10.7	10.4	104.9	(155.7)
2009	14.9%	6.0%	5.6%	54.6%	81.2%
(189.5)	28.3	11.4	10.6	103.5	(153.8)
2010	15.2%	6.5%	6.0%	53.2%	80.8%
(201.3)	30.5	13.1	12.1	107.0	(162.7)
2011	15.4%	7.4%	6.5%	52.9%	82.4%
(194.4)	30.0	14.4	12.7	103.1	(160.2)
2012	16.5%	7.7%	6.7%	49.0%	79.9%
(191.4)	31.6	14.7	12.9	93.8	(153.0)

(Source: RMA)

TIRE MARKET PROFILE

Vehicle Registrations, Sales & Mileage

U.S. TOTAL REGISTRATIONS

(million of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
2007	125.20	122.46	2.72	4.53	254.91
2008	124.53	125.63	2.54	4.27	256.97
2009	123.70	126.72	2.82	4.73	257.97
2010	121.81	126.05	2.46	4.11	254.43
2011	120.85	127.12	2.83	4.71	255.51
2012	119.14	128.12	2.60	4.41	254.27

(Source: AAIA)

CANADA TOTAL REGISTRATIONS

(million of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
2007	11.60	7.54	0.26	0.59	19.99
2008	11.55	6.92	0.24	0.53	19.24
2009	12.33	8.24	0.26	0.60	21.43
2010	13.07	8.73	0.28	0.63	22.71
2011	12.99	8.86	0.27	0.65	22.77
2012	12.80	8.93	0.29	0.61	22.63

(Source: Statistics Canada, TR Estimates)

U.S. NEW VEHICLE SALES

(million of units)

	Cars			LT/SUV			Trucks			
Year	Domestic	Import	Total	Domestic	Import	Total	Class 4-6	Class 7-8	Total	Total Vehicles
2007	2.80	4.80	7.60	5.40	3.00	8.40	0.18	0.25	0.43	16.45
2008	2.30	4.50	6.80	4.00	2.40	6.40	0.13	0.19	0.32	13.54
2009	1.70	3.70	5.40	2.90	2.00	4.90	0.08	0.15	0.23	10.59
2010	1.80	3.80	5.60	3.40	2.50	5.90	0.08	0.16	0.24	11.70
2011	1.99	4.10	6.09	3.89	2.66	6.55	0.10	0.22	0.32	12.96
2012	2.23	4.99	7.22	4.11	2.99	7.10	0.12	0.25	0.37	14.69

(Source: AAIA)

U.S. MILLIONS OF VEHICLE MILES

(all improved roads and streets)

Year	Miles
2007	3,029,791
2008	2,973,471
2009	2,979,175
2010	2,970,000
2011	2,960,000
2012	2,936,000

(Source: US Dept. of Transportation)

AVERAGE AGE OF CARS & LIGHT TRUCKS

Year	Cars	Light Trucks	All Light Vehicles
2007	10.4	9.0	9.8
2008	10.6	9.3	10.0
2009	10.8	9.8	10.3
2010	11.0	10.1	10.6
2011	11.1	10.4	10.8
2012	11.2	11.1	11.1

(Source: AAIA, R.L. Polk & Co.)

TIRE MARKET PROFILE

U.S. Vehicle Sales by Type

TOP 10 PASSENGER CAR SALES

Brand/Model	2011	2012	% Change 11/12
Toyota Camry	308,875	407,496	31.9%
Honda Accord	237,962	328,395	38.0%
Honda Civic	222,545	315,792	41.9%
Nissan Altima	266,728	307,018	15.1%
Toyota Corolla	241,701	290,794	20.3%
Ford Focus	176,123	244,756	39.0%
Ford Fusion	248,444	243,225	-2.1%
Chevrolet Cruze	229,071	235,848	3.0%
Hyundai Sonata	226,925	227,024	0.0%
Chevrolet Malibu	202,978	208,485	2.7%
Top 10 Passenger Car Sales	**2,361,352**	**2,808,833**	**19.0%**
Total U.S. Passenger Car Sales	**6,093,578**	**7,220,444**	**18.5%**
Top 10 as a % of Total Passenger Car Sales	**38.8%**	**38.9%**	

TOP 10 LIGHT TRUCK/SUV SALES

Brand/Model	2011	2012	% Change 11/12
Ford F-Series	545,189	600,052	10.1%
Chevrolet Silverado	411,730	415,373	0.9%
Honda CR-V	218,505	280,402	28.3%
Dodge Ram Pickup	234,681	271,940	15.9%
Ford Escape	253,994	261,901	3.1%
Chevrolet Equinox	193,299	217,513	12.5%
Toyota RAV4	133,304	171,722	28.8%
Ford Explorer	132,589	164,056	23.7%
GMC Sierra	148,395	155,768	5.0%
Jeep Grand Cherokee	125,822	154,729	23.0%
Top 10 Light Truck Sales	**2,397,508**	**2,693,456**	**12.3%**
Total U.S. Light Truck Sales	**6,563,792**	**7,094,064**	**8.1%**
Top 10 as a % of Total Light Trucks Sales	**36.5%**	**38.0%**	

(Source: AAIA)

TIRE MARKET PROFILE

Canada Vehicle Sales by Type

TOP 10 PASSENGER CAR SALES

Brand/Model	**2011**	**2012**	**% Change 11/12**
Honda Civic	55,090	64,962	17.9%
Hyundai Elantra	44,970	50,950	13.3%
Toyota Corolla	36,663	40,906	11.6%
Mazda Mazda3	37,224	39,295	5.6%
Chevrolet Cruze	33,900	32,628	-3.8%
Ford Focus	25,736	27,936	8.5%
Volkswagen Jetta	26,749	26,904	0.6%
Hyundai Accent	22,280	22,581	1.4%
Toyota Camry	12,334	18,203	47.6%
Ford Fusion	18,404	16,698	-9.3%
Top 10 Passenger Car Sales	**313,350**	**341,063**	**8.8%**
Total Canadian Passenger Car Sales	**693,735**	**759,795**	**9.5%**
Top 10 as a % of Total Passenger Car Sales	**45.2%**	**44.9%**	

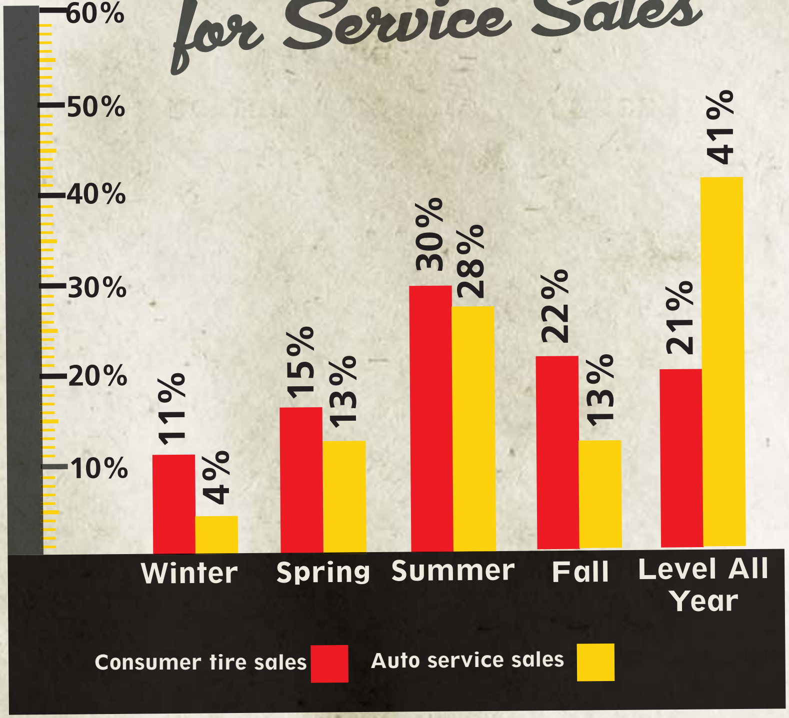
TOP 10 LIGHT TRUCK/SUV SALES

Brand/Model	**2011**	**2012**	**% Change 11/12**
Ford F-Series	96,325	106,358	10.4%
Dodge Ram Pickup	62,929	67,634	7.5%
Dodge Caravan/Grand Caravan	53,406	51,552	-3.5%
Ford Escape	44,248	44,099	-0.3%
GMC Sierra	46,680	42,712	-8.5%
Chevrolet Silverado	40,523	35,943	-11.3%
Honda CR-V	25,076	33,339	33.0%
Dodge Journey	29,021	28,888	-0.5%
Toyota RAV4	21,550	25,942	20.4%
Hyundai Sante Fe	24,121	23,394	-3.0%
Top 10 Light Truck Sales	**443,879**	**459,861**	**3.6%**
Total Canadian Light Truck Sales	**891,784**	**915,880**	**2.7%**
Top 10 as a % of Total Light Truck Sales	**49.8%**	**50.2%**	

(Source: AAIA)

TIRE MARKET PROFILE

SUMMER *Still the Strongest for Service Sales*



THE TYPICAL DEALER WROTE...

303 repair orders per month

Billing an average of **$199.10** per repair order

WHERE DEALERS GET SERVICE PARTS

43.3%	Local parts jobber (NAPA, etc.)
30.8%	Local parts retailer (AutoZone, etc.)
9.2%	Warehouse parts dist.
8.8%	New car dealer (OEM)
2.5%	Direct from manufacturer
2.5%	Wagon jobber
2.2%	Tire company
1.4%	Order online
1.4%	Other source

HYBRID REGISTRATIONS BY STATE

State	Total Registrations	% Share
California	483,741	24.0%
Florida	105,928	5.3%
New York	105,320	5.2%
Texas	104,232	5.2%
Virginia	79,925	4.0%
Washington	77,007	3.8%
Illinois	72,694	3.6%
Pennsylvania	64,002	3.2%
Massachusetts	62,550	3.1%
New Jersey	57,885	2.9%
All Other States	802,984	39.8%
Total	**2,016,268**	**100.0%**

TIRE MARKET PROFILE

DEALERS SELLING CHINESE BRAND MEDIUM TRUCK TIRES

56% YES

44% NO

BRANDS NAMED BY THOSE CARRYING CHINA-MADE PRODUCT:

50%	Double Coin
30%	Linglong
27%	Triangle
20%	Primewell
17%	GT Radial
17%	Roadmaster
17%	Sampson
10%	Westlake
7%	Runway
7%	Long March
50%	Other

WHAT CONCERNS DEALERS MOST

HOW DEALER INFLUENCES CONSUMER BUYING DECISIONS

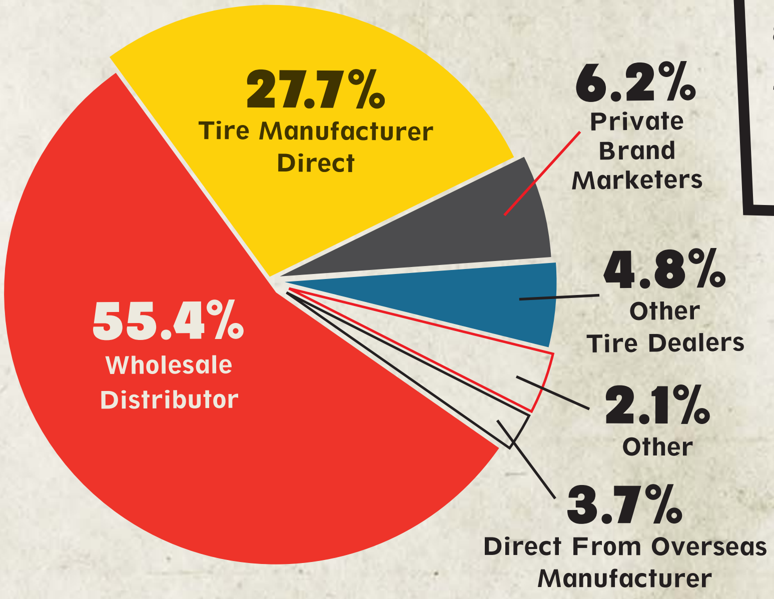
37.8%	Customers ask for a specific tire brand, and...
55.6%	Will listen to dealer recommendation, but...
25%	Won't switch at all
27%	Replace OE tire with exact same tire

TIRE MARKET PROFILE

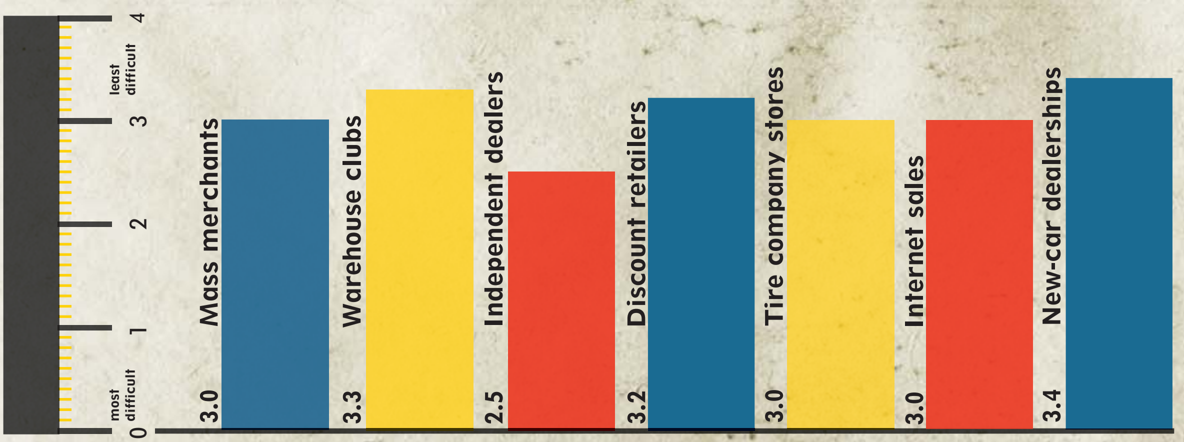
WHAT REPEAT CUSTOMERS MEAN TO TIRE/SERVICE SALES

% of Dealers say repeat cutomers represent...	...% of monthly sales
72% of dealers say	51%+ of monthly sales from repeat customers
13%	41%-50%
8%	31%-40%
5%	21%-31%
1%	11%-20%
1%	1%-10%

WHERE DEALERS GET CONSUMER TIRES



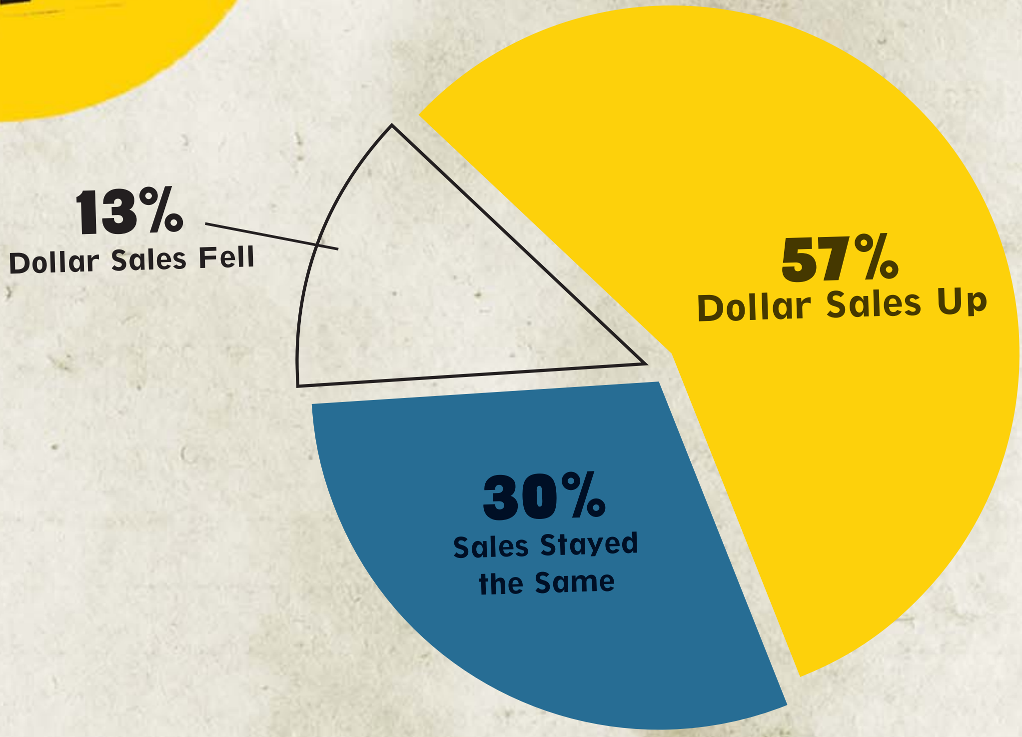
Who Dealer Sees as Most Difficult Competition



TIRE MARKET PROFILE

Dealer Sales Volume: Vehicle Service

(2012 sales vs. 2011)

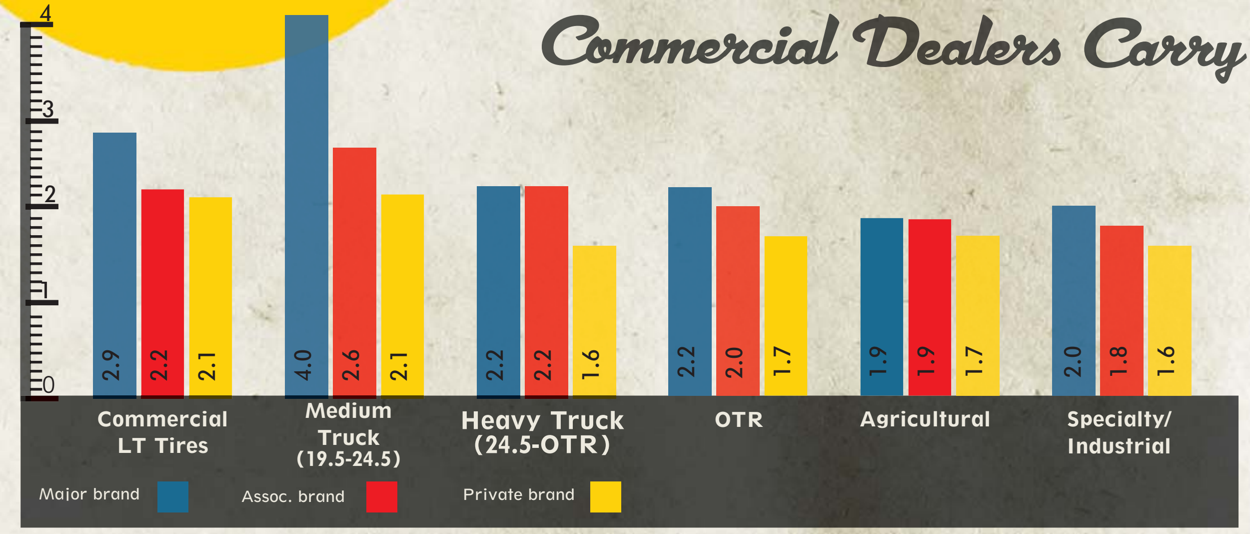


What Commercial Tire Dealers Sell

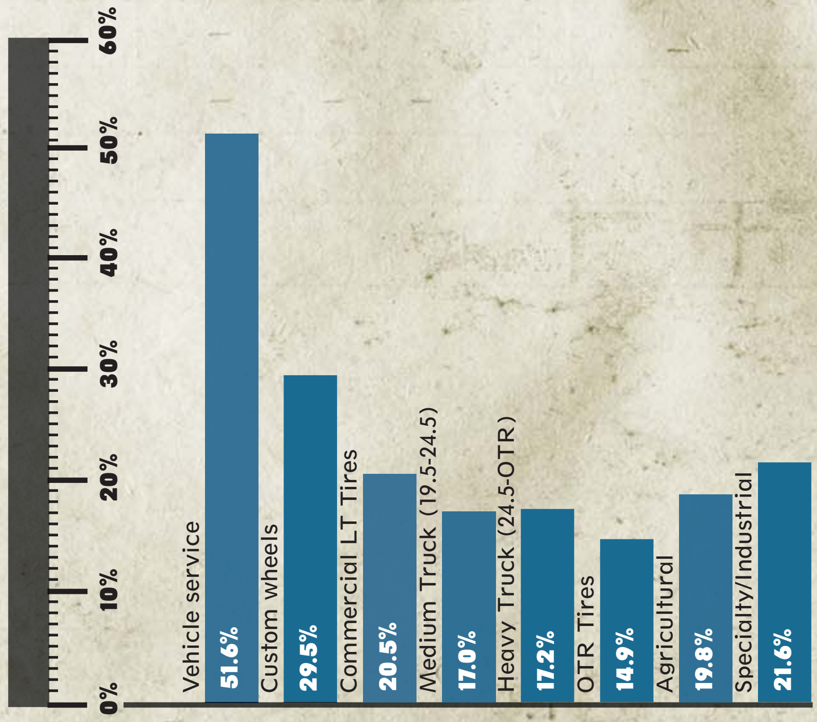
97%	**Commercial LT** (under 19.5)
86%	**Medium Truck** (19.5-24.5)
63%	**Ag**
61%	**Specialty/Industrial**
48%	**OTR**
48%	**Heavy Truck** (over 24.5)

TIRE MARKET PROFILE

Number of Brands Commercial Dealers Carry



AVERAGE GROSS PROFITS: 2012 SALES



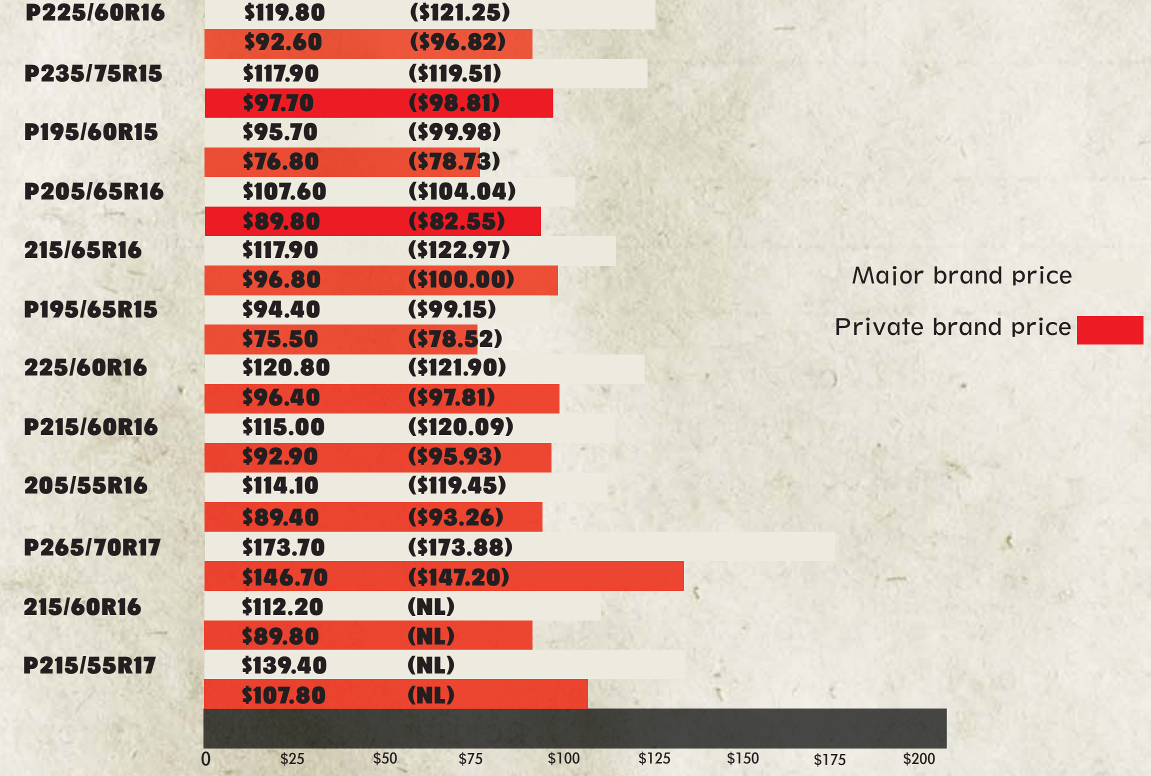
HOW DEALERS ADVERTISE/PROMOTE

(2013 data, parentheses denote 2012 results, more than 100% due to multiple responses)

53%	(54%)	Yellow Pages
43%	(39%)	Newspaper ads
38%	(38%)	Direct mail
69%	(63%)	Website
32%	(29%)	Reminder cards
43%	(43%)	Radio ads
21%	(19%)	Cable TV
21%	(13%)	Local TV
35%	(38%)	Community service
22%	(13%)	Field sales force
39%	(35%)	Social media
12%	(8%)	Other promotions
75%	(75%)	Word of mouth
23%	(17%)	Smartphone apps/mobile
7%	(4%)	Telemarketing

AVERAGE RETAIL PRICE: *Replacement Passenger Tires*

(2012 most popular sizes: RMA)

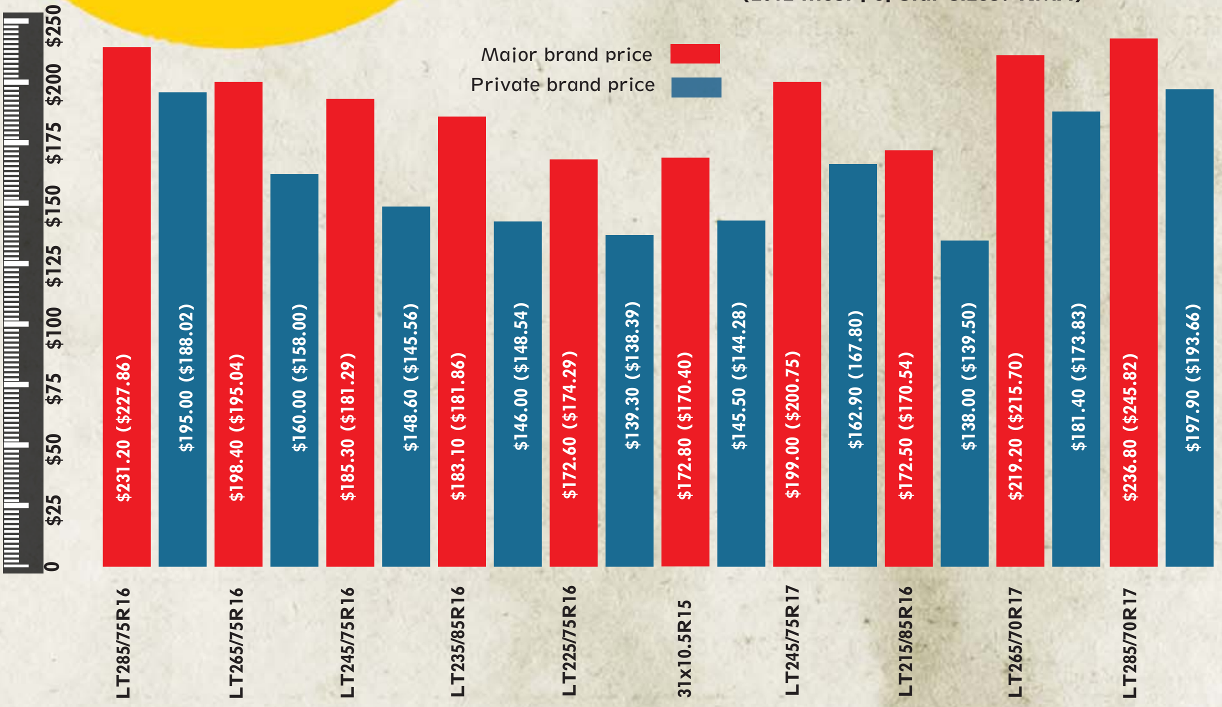


Figures in parentheses are results from 2012 Tire Dealer Profile study. NL indicates that prices for that size were not tracked last year. Prices are for tires only.

TIRE MARKET PROFILE

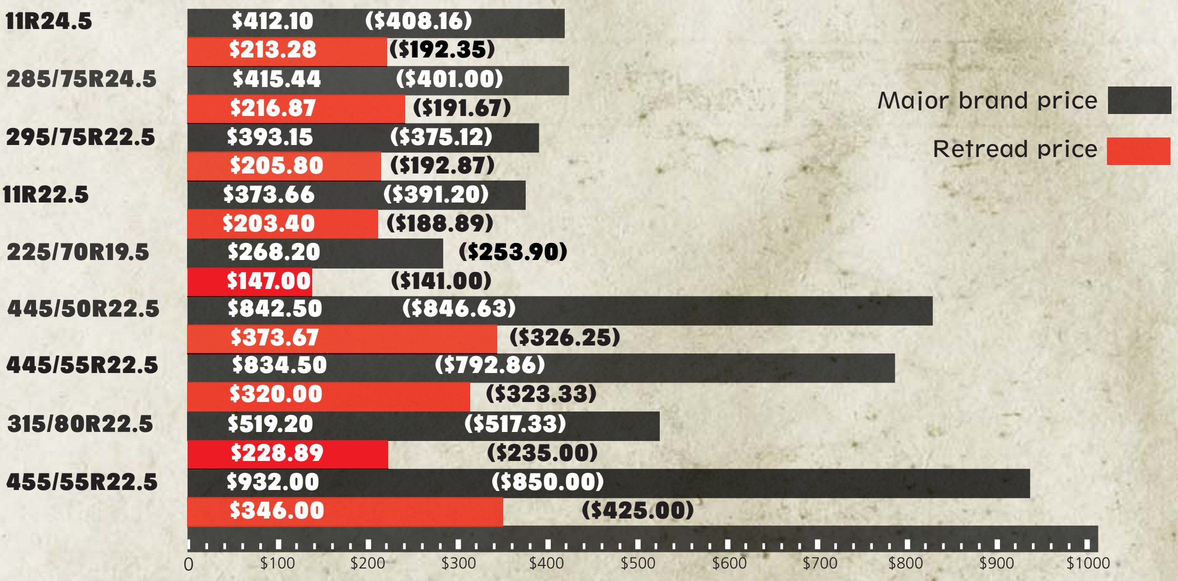
AVERAGE RETAIL PRICE: REPLACEMENT LT/SUV TIRES

(2012 most popular sizes: RMA)



AVERAGE RETAIL PRICE: *Replacement Medium Truck Tires*

(2012 most popular sizes: RMA)



Figures in parentheses are results from 2012 Tire Dealer Profile study. NL indicates that prices for that size were not tracked last year. Some figures based on TR estimates. Prices are for tires only.

TIRE MARKET PROFILE

WHAT EQUIPMENT DEALERS USE

(percentage owning or leasing)

97%	Computerized tire/wheel balancer
95%	Air compressor
95%	Battery tester/charger
86%	Above-ground lift
86%	Tire changer: euro style
85%	Tire changer: standard
85%	TPMS reset/recalibrate tool
81%	Alignment rack
76%	Parts cleaner
72%	Engine diagnostic analyzer
72%	A/C Refrigerant recycler
71%	Brake lathe: off-vehicle
46%	Service truck
42%	Brake lathe: on-vehicle
28%	Nitrogen inflation system
24%	Tube benders

TIRE DEALERS DO A LOT OF VEHICLE SERVICE WORK

(2012 total jobs completed)

SERVICE	JOBS
Alignments	23,273,672
Axle (CV shaft/U-joint)	2,403,147
Ball Joints	4,692,105
Batteries	4,802,833
Brake Calipers	3,963,722
Brake Hydraulics	1,564,900
Brake Pads/Shoes	13,823,717
Brake Rotors	9,968,993
Coolant Flush/Refill	2,095,184
Air Filters	6,799,400
Cabin Filters	3,012,152
Fuel Filters	2,889,313
Oil Change/Filter	30,706,299
Hybrid (Drive Line)	131,490
Lighting (Bulbs)	10,384,224
Air Shocks	1,500,020
Shocks/Struts	4,539,854
Steering (Rack/Gear)	612,465
Suspension (Control Arms)	2,583,945
Tie Rods	6,287,283
Tires	147,739,028
TPMS Sensors	3,918,738
Wheel Bearings	4,686,915
Wiper Blades	10,924,024