



MARKETPROFILE

2007 wasn't a banner year for the tire and automotive industries. While the tire side saw a slight improvement against 2006, tire shipments and sales did not meet expectations as gas and consumer goods prices began eating into household budgets. Growing fuel prices in late 2007 started an erosion in miles traveled and vehicle sales.

Cost pressures and continuing restructuring among tire-makers caused marketshare shifts as well, making it yet another interesting year to be a tire dealer – still the North American market leader in distribution.

But what will continuing, fully global market forces do to re-shape the tire industry?

The constantly changing landscape makes it difficult to pin down an accurate picture of the overall tire industry. To help steady the shifting target, we've compiled this Market Profile

section – a collection of real-world data that, taken as a whole, can help you see emerging markets while they are still trends so you can better prepare your business for what lies ahead.

Through painstaking research, we've been able to assemble this collection of data, which includes: tire brand market-shares in the tire dealer channel; tire shipments for passenger, light truck/SUV, medium truck, OTR and ag/forestry; a look at the OE and replacement segments of the high performance market; the most popular tire sizes at OE and replacement levels; brand and channel segmentation; new vehicle sales and vehicle registrations as well as miles driven by vehicle type.

It's a dynamic and comprehensive look at a dynamic and fast-changing global industry.

Brand Marketshares – Dealer Channel

P-Metric Tires

2007 RMA Replacement Shipments: 204.03 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	12.80%	Hankook	2.55%	Falken	1.00%
Michelin	8.70%	Kumho	2.55%	Sumitomo	1.00%
Firestone	8.60%	Kelly	2.20%	Sigma	0.95%
Bridgestone	7.10%	Yokohama	2.20%	Big O	0.95%
BFGoodrich	4.70%	Dunlop	1.90%	American Radial	0.80%
Cooper	4.60%	Hercules	1.85%	National	0.75%
General	3.25%	Mastercraft	1.85%	Regul	0.75%
Multi-Mile	2.70%	Cordovan	1.75%	Dean	0.65%
Uniroyal	2.65%	Delta	1.55%	Fuzion	0.45%
Toyo	2.60%	Pirelli	1.15%	Wanli	0.20%
Dayton	2.55%	Continental	1.05%	Others	11.65%

Performance (H-Rated & Above)

2007 RMA Replacement Shipments: 52.38 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	15.15%	Pirelli	3.15%	Dayton	0.95%
Michelin	12.90%	Cooper	2.60%	Nitto	0.70%
Bridgestone	8.85%	Hankook	2.55%	Big O	0.65%
Yokohama	7.45%	Sumitomo	2.55%	Nexen	0.45%
Toyo	7.25%	General	2.25%	Mastercraft	0.40%
BFGoodrich	6.50%	Continental	2.10%	Others	0.15%
Firestone	5.30%	Uniroyal	1.35%		
Dunlop	4.95%	Kelly	1.30%		
Kumho	4.45%	Multi-Mile	1.15%		
Falken	3.95%	Wanli	0.95%		



Brand Marketshares – Dealer Channel

LT-Metric

2007 RMA Replacement Shipments: 34.19 million
Shares Rounded to Nearest .05%

Brand	Dealer Share
Goodyear	10.25%
BFGoodrich	8.85%
Bridgestone	7.20%
Michelin	7.05%
Firestone	6.80%
Cooper	6.60%
Multi-Mile	5.50%
General	4.95%
Kelly	3.40%
Toyo	3.20%
Mastercraft	2.90%
Cordovan	2.55%
Yokohama	2.55%
Uniroyal	2.40%
Delta	2.05%
Dunlop	1.90%
Dayton	1.75%
Continental	1.70%
Kumho	1.65%
Pirelli	1.20%
Hankook	1.20%
National	1.10%
Hercules	1.10%
Big O	0.95%
Laramie	0.90%
Eldorado	0.85%
Mickey Thompson	0.65%
Others	8.80%

Medium Truck

2007 RMA Replacement Shipments: 16.57 million
Shares Rounded to Nearest .05%

Brand	Dealer Share
Goodyear	19.20%
Bridgestone	17.90%
Michelin	16.95%
Firestone	6.90%
Yokohama	5.05%
Toyo	4.80%
General	4.60%
Sumitomo	2.75%
Hankook	2.50%
Kelly	2.45%
Dunlop	2.35%
Kumho	2.20%
Continental	2.10%
Power King	1.70%
Hercules	1.55%
BFGoodrich	1.25%
Double Coin	1.15%
Others	4.60%

OTR

2007 Industry Replacement Shipments: 138.14 thousand
Shares Rounded to Nearest .05%

Brand	Bias Share	Radial Share
Bridgestone	9.45%	37.90%
Firestone	26.65%	--
Michelin	--	27.50%
Goodyear	28.30%	24.65%
General	18.00%	--
Titan	8.10%	--
Continental	--	3.70%
Others	17.60%	6.25%

Agricultural

2007 Industry Replacement Shipments: 1.97 million
Shares Rounded to Nearest .05%

Rear Tire Segment

Brand	Bias Share	Radial Share
Firestone	43.25%	37.40%
Goodyear	15.50%	30.00%
Titan	18.65%	10.10%
Univ. Co-Op	6.00%	8.30%
Michelin	--	8.35%
BFGoodrich	--	2.50%
Harvest King	4.10%	--
Akuret	3.20%	--
Alliance	1.70%	1.00%
Galaxy	2.10%	--
Denman	0.85%	--
Trelleborg	1.00%	0.75%
Others	3.65%	1.60%

Front/Implement Tire Segment

Brand	Share
Firestone	38.40%
Titan	16.80%
Goodyear	16.70%
Univ. Co-Op	6.50%
Harvest King	5.30%
American Farmer	5.00%
Denman	2.70%
Galaxy	1.70%
Alliance	1.00%
Trelleborg	0.50%
Others	5.40%



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2007 U.S. Tire Shipments

P-Metric

(millions of units)

Year	Replacement	OE
2001	190.77	54.56
2002	190.54	57.32
2003	193.61	54.54
2004	199.18	53.00
2005	202.31	52.73
2006	196.16	48.18
2007	204.03	46.26

(Source: RMA)

M+S-Rated

(millions of units)

Year	Replacement	OE
2001	7.77	2.01
2002	6.28	2.15
2003	6.87	2.21
2004	7.90	2.14
2005	8.45	1.48
2006	8.08	1.06
2007	9.24	1.70

(Source: RMA)

LT-Metric

(millions of units)

Year	Replacement	OE
2001	31.50	6.15
2002	33.64	8.30
2003	34.49	7.95
2004	36.37	7.35
2005	36.03	6.70
2006	33.56	5.01
2007	34.19	4.43

(Source: RMA)

Medium Truck

(millions of units)

Year	Replacement	OE	Retreads
2001	13.57	3.44	15.47
2002	14.72	3.86	15.56
2003	15.52	4.16	15.46
2004	16.29	5.74	15.84
2005	17.52	6.24	15.87
2006	16.86	6.83	14.70
2007	16.57	4.65	15.20

(Source: RMA & TR Estimates)

OTR

(thousands of units)

Year	Replacement		OE	
	Bias	Radial	Bias	Radial
2001	69.20	66.06	16.64	40.99
2002	58.91	65.87	16.44	37.76
2003	59.57	70.86	14.34	44.28
2004	67.48	81.72	24.48	53.53
2005	61.51	74.49	27.32	59.68
2006	61.72	74.61	28.03	59.84
2007	62.63	75.51	28.74	60.00

(Source: TR Estimates)

Ag/Forestry

(millions of units)

Year	Replacement		OE	
	F	R	F	R
2001	1.5	0.74	0.32	0.46
2002	1.4	0.70	0.33	0.49
2003	1.3	0.68	0.33	0.50
2004	1.3	0.72	0.35	0.66
2005	1.3	0.70	0.34	0.61
2006	1.3	0.71	0.35	0.63
2007	1.3	0.67	0.36	0.65

(Source: TR Estimates)

2007 Top Tire Sizes – U.S.

Replacement P-Metric

Rank	Size	Share
1	P225/60R16	4.8%
2	P235/75R15	4.3%
3	P205/65R15	3.2%
4	P215/70R15	2.6%
5	P205/70R15	2.4%
6	P265/70R17	2.4%
7	P215/60R16	2.1%
8	P195/65R15	2.0%
9	P265/70R16	1.8%
10	P235/70R16	1.8%

OE P-Metric

Rank	Size	Share
1	P215/60R16	5.8%
2	P245/65R17	4.4%
3	P235/70R16	4.3%
4	P265/70R17	4.0%
5	P195/60R15	3.1%
6	P275/55R20	2.6%
7	215/60R16	2.5%
8	P225/50R17	2.4%
9	P255/70R18	2.4%
10	P275/65R18	2.3%

Replacement LT-Metric

Rank	Size	Share
1	LT265/75R16	15.7%
2	LT245/75R16	15.4%
3	LT235/85R16	11.5%
4	LT225/75R16	8.0%
5	31x10.50R15	6.7%
6	LT285/75R16	5.9%
7	LT265/70R17	5.0%
8	LT215/85R16	4.4%
9	LT235/75R15	4.3%
10	30x9.50R15	1.8%

OE LT-Metric

Rank	Size	Share
1	LT245/75R16	40.8%
2	LT225/75R16	16.3%
3	LT265/70R17	12.5%
4	LT245/75R17	5.4%
5	LT275/65R20	4.1%
6	LT215/85R16	3.3%
7	LT265/75R16	3.3%
8	37x12.50R16.5	2.6%
9	LT275/65R18	1.7%
10	LT255/75R17	1.6%

Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	26.6%
2	11R22.5	23.4%
3	11R24.5	12.9%
4	285/75R24.5	7.8%
5	225/70R19.5	5.3%

OE Medium Truck

Rank	Size	Share
1	295/75R22.5	29.4%
2	11R22.5	25.6%
3	225/70R19.5	10.7%
4	11R24.5	9.3%
5	245/70R19.5	3.4%

(Source: RMA)

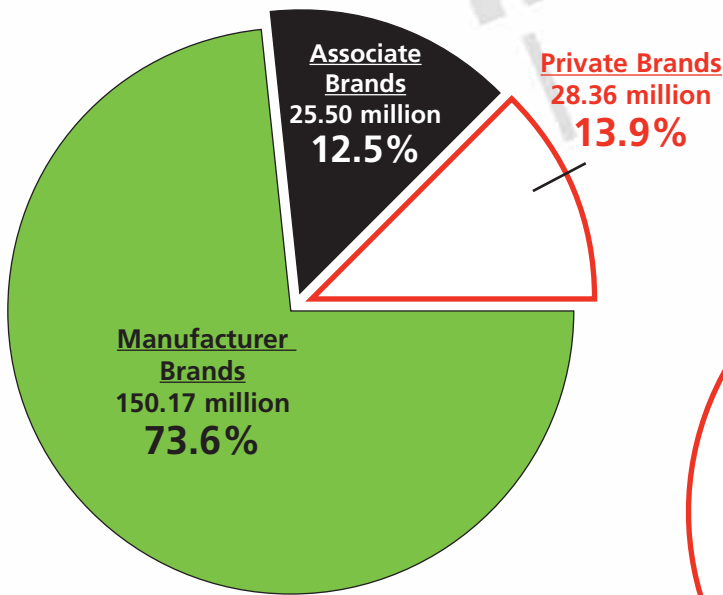


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2007 U.S. Brand-Type Shares

P-Metric Replacement

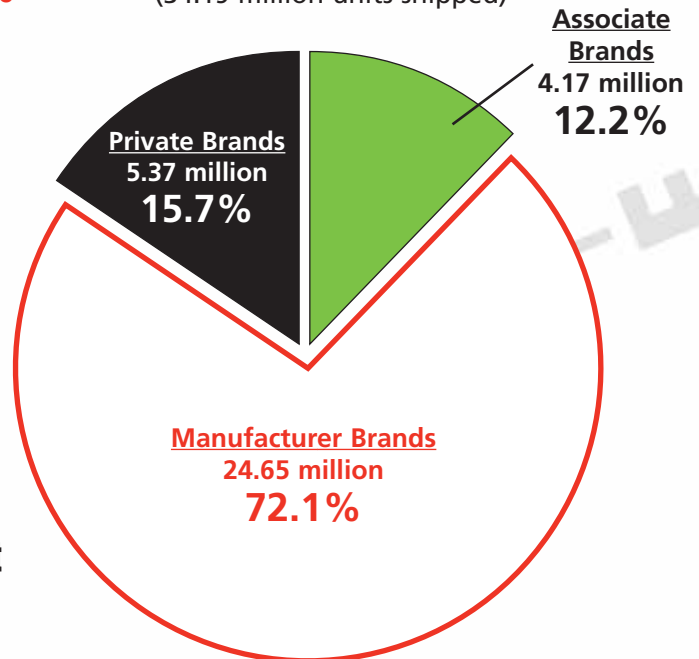
(204.03 million units shipped)



(Source: RMA)

LT-Metric Replacement

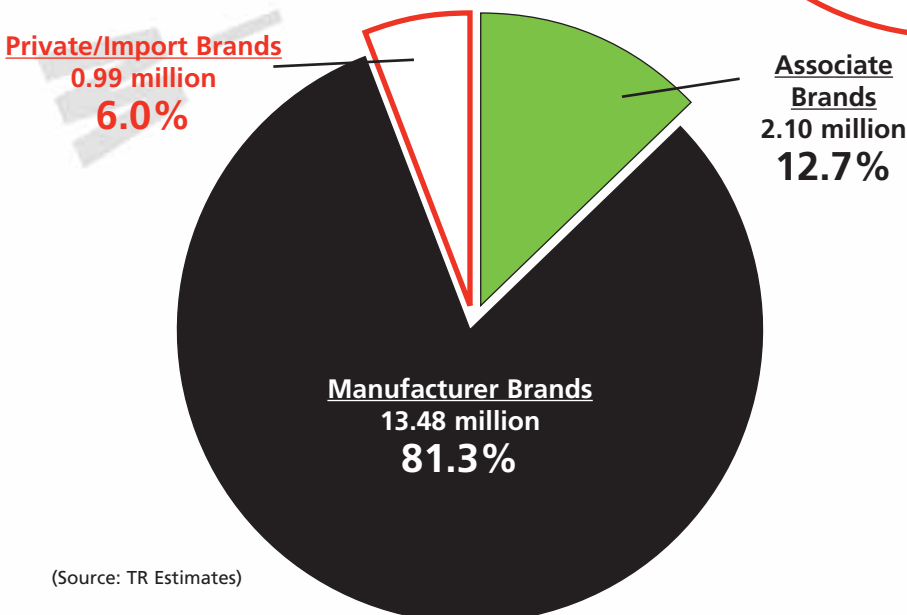
(34.19 million units shipped)



(Source: RMA)

Medium Truck Replacement

(16.57 million units shipped)



(Source: TR Estimates)

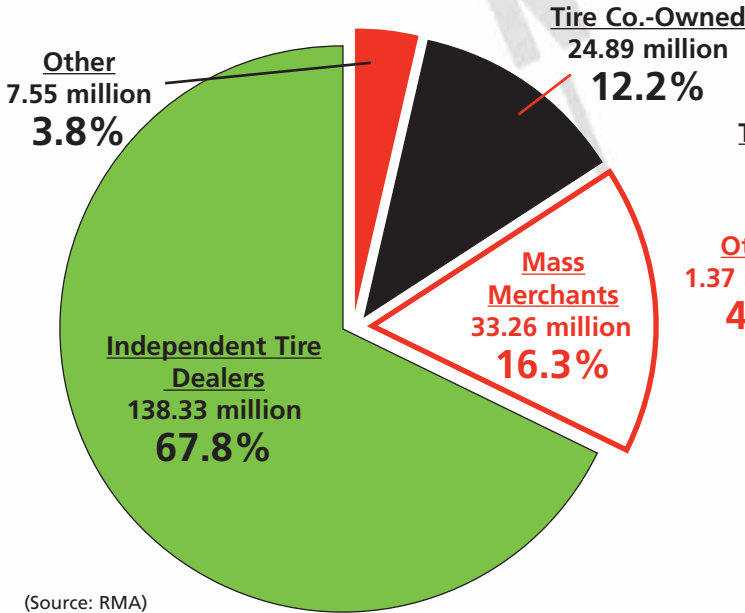


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2007 U.S. Distribution Channel Shares

P-Metric

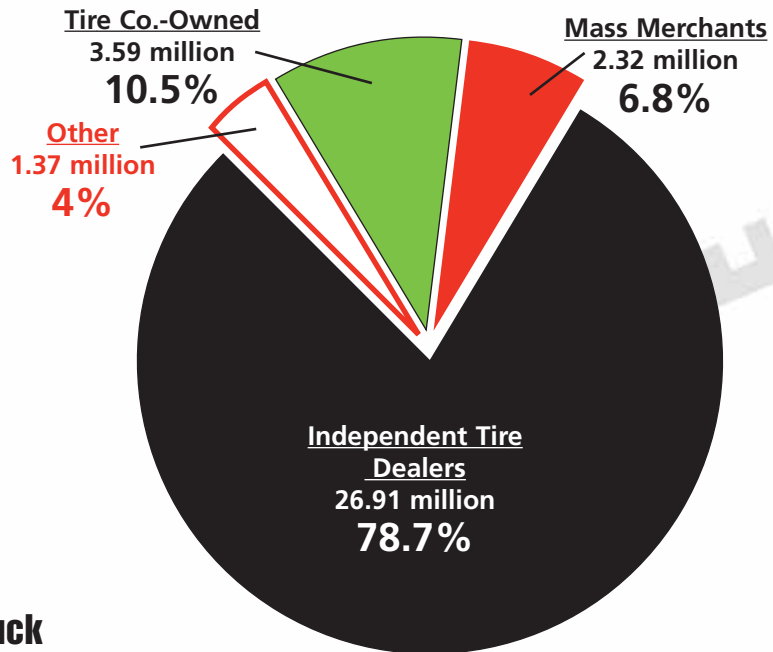
(204.03 million units shipped)



(Source: RMA)

LT-Metric

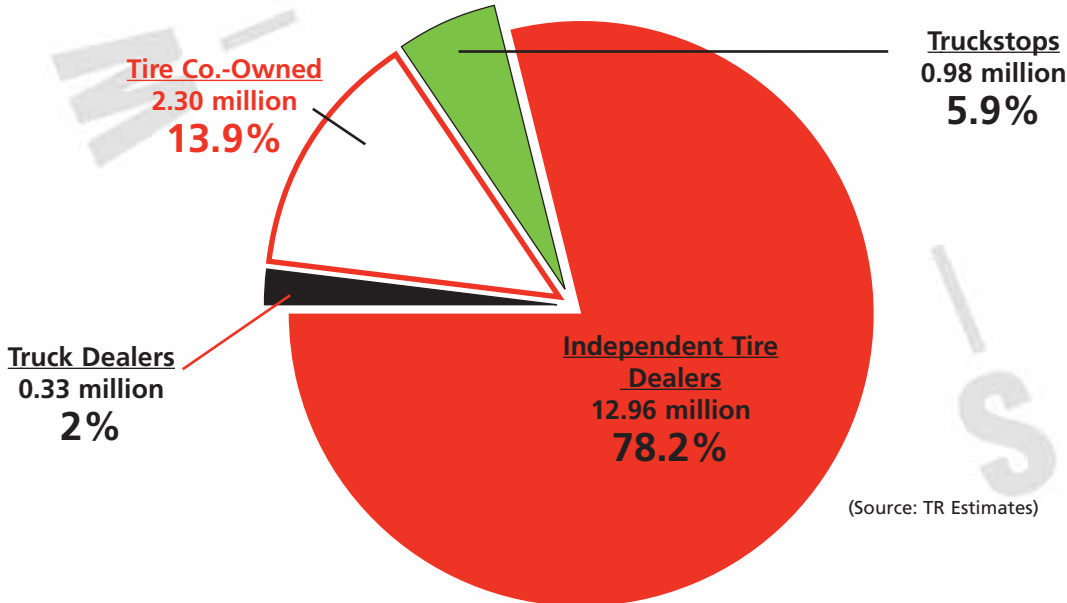
(34.19 million units shipped)



(Source: RMA)

Medium Truck

(16.57 million units shipped)



(Source: TR Estimates)



P-Metric (millions of units)

Year	Replacement	OE
2001	15.67	10.98
2002	16.17	11.14
2003	16.33	11.30
2004	16.71	12.63
2005	17.59	12.32
2006	16.40	11.63
2007	17.39	10.69

(Source: Rubber Association of Canada)

LT-Metric (millions of units)

Year	Replacement	OE
2001	2.44	0.90
2002	2.63	0.88
2003	2.62	0.80
2004	2.60	0.72
2005	2.78	0.69
2006	2.60	0.64
2007	2.74	0.75

(Source: Rubber Association of Canada)

2007 Canada Tire Shipments

Winter (millions of units)

Year	Replacement
2001	4.16
2002	4.46
2003	4.43
2004	5.29
2005	5.97
2006	5.29
2007	5.44

(Source: Rubber Association of Canada)

High Performance (millions of units)

Year	Replacement
2001	0.88
2002	1.10
2003	1.13
2004	1.40
2005	1.58
2006	1.51
2007	2.37

(Source: Rubber Association of Canada)

Medium Truck (millions of units)

Year	Replacement	OE
2001	1.34	0.43
2002	1.48	0.48
2003	1.39	0.42
2004	1.52	0.56
2005	1.48	0.54
2006	1.49	0.48
2007	1.36	0.38

(Source: Rubber Association of Canada)

2007 Top Replacement Tire Sizes – Canada

P-Metric Tires

Rank	Size	Share
1	P215/70R15	4.0%
2	P225/60R16	3.9%
3	P195/65R15	3.9%
4	P185/65R14	3.4%
5	195/65R15	3.0%
6	P215/65R16	2.8%
7	205/55R16	2.8%
8	P205/70R15	2.4%
9	P235/75R15	2.4%
10	P205/65R15	2.3%

Performance Tires

Rank	Size	Share
1	205/55R16	8.2%
2	195/65R15	5.6%
3	195/60R15	4.8%
4	P205/55R16	4.0%
5	205/60R16	2.9%
6	205/50R16	2.6%
7	P225/60R16	2.5%
8	225/60R16	2.3%
9	225/45R17	2.2%
10	205/65R15	2.1%

Winter Tires

Rank	Size	Share
1	195/65R15	6.9%
2	205/55R16	5.3%
3	215/65R16	4.2%
4	P195/65R15	3.9%
5	215/70R15	3.2%
6	185/65R14	2.8%
7	215/60R16	2.7%
8	225/60R16	2.6%
9	P195/60R15	2.6%
10	P185/65R14	2.6%

LT-Metric Tires

Rank	Size	Share
1	LT245/75R16	20.7%
2	LT265/75R16	13.7%
3	LT235/85R16	9.7%
4	LT225/75R16	9.5%
5	LT265/70R17	9.4%
6	LT235/75R15	5.4%
7	LT285/75R16	3.7%
8	LT215/85R16	3.2%
9	31x10.50R15	3.1%
10	LT285/70R17	1.9%

(Source: Rubber Association of Canada)

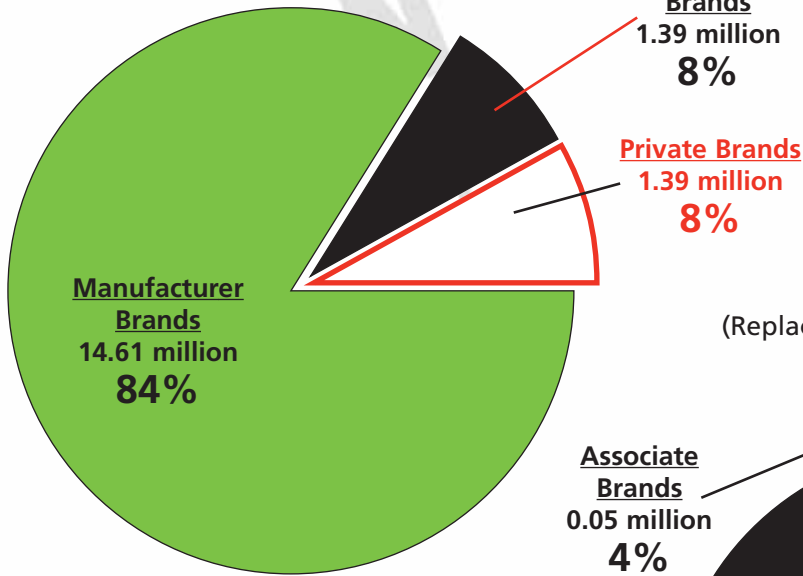


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2007 Canada Brand-Type Shares

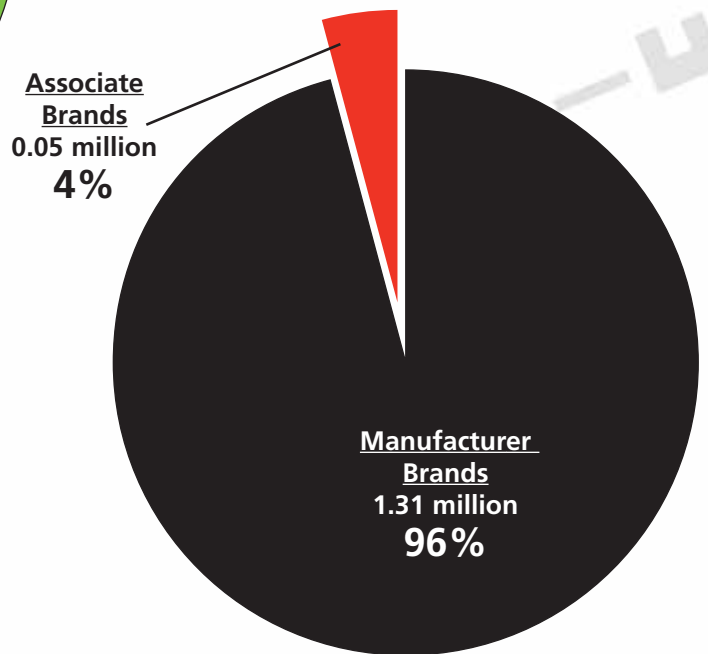
P-Metric

(Replacement – 17.39 million units shipped)



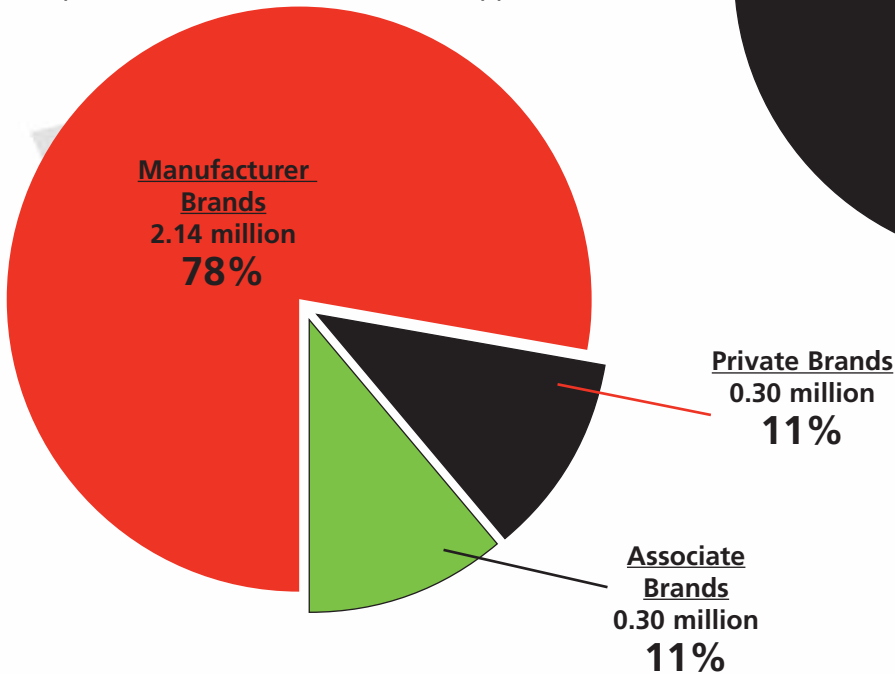
Medium Truck

(Replacement – 1.36 million units shipped)



LT-Metric

(Replacement – 2.74 million units shipped)



(Source: Rubber Association of Canada)



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Speed-Rated Tire Breakdown

OE Market

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

Year	H-Rated	V-Rated	Z-Rated	Other Speed Rated
Total OE				
2001.....	10.4%	3.8%	1.0%	72.3%
(54.56)	5.67	2.09	0.56	39.46
2002	9.7%	4.6%	1.6%	78.1%
(57.32)	5.54	2.62	0.90	44.80
2003.....	8.58%	6.25%	2.02%	78.4%
(54.54)	4.68	3.41	1.10	42.76
2004.....	7.72%	6.85%	2.09%	79.57%
(53.00)	4.09	3.63	1.11	42.17
2005	7.6%	8.52%	2.64%	78.46%
(52.73)	4.01	4.49	1.39	41.37
2006	9.1%	12.1%	3.3%	70.3%
(45.69)	4.40	5.81	1.61	33.87
2007.....	12.1%	12.9%	3.2%	71.8%
(44.88)	5.43	5.79	1.44	32.23

(Source: RMA)

Replacement Market

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

Year	H-Rated	V-Rated	Z-Rated	Other Speed Rated
Total Replace.				
2001	9.4%	2.0%	2.0%	62.2%
(190.77)	18.00	3.80	3.78	118.60
2002	11.4%	2.4%	2.3%	59.4%
(190.54)	21.72	4.57	4.38	113.18
2003	13.01%	2.88%	2.75%	58.20%
(193.61)	25.19	5.57	5.33	112.68
2004	13.74%	3.45%	3.48%	57.40%
(199.18)	27.37	6.87	6.93	114.32
2005	14.31%	4.16%	4.07%	60.99%
(202.31)	28.96	8.42	8.24	123.38
2006.....	15.3%	4.8%	4.9%	57.7%
(161.86)	30.03	9.41	9.54	112.88
2007	19.14%	6.15%	6.42%	68.30%
(165.23)	31.62	10.16	10.60	112.85

(Source: RMA)



MARKETPROFILE

Vehicle Registrations & Sales

U.S. Registrations

(millions of vehicles)

Year	Class		Class		Total Vehicles
	Cars	LT/SUVs	4-6 Trucks	7-8 Trucks	
2001	128.71	80.49	2.78	4.50	216.48
2002	129.91	83.63	2.85	4.56	220.94
2003	131.07	87.30	2.87	4.60	225.84
2004	132.47	92.51	2.95	4.70	232.61
2005	133.91	98.08	3.08	4.90	239.97
2006	135.05	102.04	3.24	5.12	245.44
2007	135.22	105.69	3.35	5.22	249.49

(Source: AAIA)

Canada Registrations

(millions of vehicles)

Year	Class		Class		Total Vehicles
	Cars	LT/SUVs	4-6 Trucks	7-8 Trucks	
2001	10.93	6.81	0.19	0.52	18.45
2002	10.98	7.02	0.19	0.52	18.71
2003	11.02	7.13	0.20	0.53	18.88
2004	11.11	7.21	0.21	0.55	19.08
2005	11.17	7.19	0.22	0.56	19.14
2006	11.29	7.20	0.24	0.57	19.30
2007	11.60	7.54	0.26	0.59	19.99

(Source: Statistics Canada, TR Estimates)

Average Age of Cars & Light Trucks

Year	Passenger		All Light Vehicles
	Cars	Trucks	
1997	8.7	8.3	N/A
1998	8.9	8.3	N/A
1999	9.1	8.5	N/A
2000	9.1	8.5	N/A
2001	9.3	8.4	N/A
2002	9.4	8.4	N/A
2003	9.6	8.5	9.1
2004	9.8	8.6	9.4
2005	10.0	8.7	9.5
2006	10.1	8.8	9.5
2007	10.4	9.0	9.7

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

Global Passenger Vehicle Sales – Top 20 Nations

	2005	2006	2007	Change (06-07)
U.S.	16,953,563	16,515,725	16,457,183	-0.35%
China	5,454,427	6,894,697	7,953,223	15.35%
Japan	5,727,557	5,557,938	5,575,859	0.32%
Germany	3,539,067	3,676,856	3,596,123	-2.20%
Italy	2,458,692	2,570,053	2,760,200	7.40%
U.K.	2,768,885	2,677,229	2,641,184	-1.35%
France	2,488,840	2,440,045	2,488,231	1.97%
Russia	1,541,751	1,924,317	2,145,784	11.51%
Brazil	1,622,438	1,844,209	1,954,492	5.98%
Spain	1,916,832	1,910,124	1,887,653	-1.18%
India	1,244,273	1,522,696	1,806,915	18.67%
Canada	1,578,944	1,614,588	1,616,601	0.12%
Korea	1,110,779	1,160,109	1,249,545	7.71%
Mexico	1,125,149	1,132,765	1,160,885	2.48%
Middle East	919,293	992,591	1,120,801	12.92%
Australia	967,752	941,642	977,499	3.81%
Africa	597,741	690,053	757,683	9.80%
Thailand	694,915	674,146	700,740	3.94%
Turkey	720,096	623,432	651,946	4.57%
Netherlands	530,644	548,547	588,296	7.25%

(Source: AASA)



MARKETPROFILE

Vehicle Sales & Mileage

U.S. Vehicle Sales (millions of units)

Year	Cars			LT/SUVs			Trucks			Total Vehicles
	Domestic	Import	Total	Domestic	Import	Total	Class 4-6	Class 7-8	Total	
2001	6.50	2.16	8.66	7.63	0.89	8.52	0.119	0.23	0.35	17.53
2002	6.02	2.30	8.32	7.55	0.98	8.53	0.113	0.22	0.33	17.17
2003	5.65	2.16	7.81	7.72	1.15	8.87	0.125	0.21	0.34	17.02
2004	5.50	2.24	7.74	8.02	1.15	9.18	0.160	0.28	0.44	17.35
2005	5.66	2.30	7.96	7.91	1.13	9.03	0.195	0.34	0.54	17.53
2006	5.70	2.42	8.13	7.15	1.28	8.43	0.206	0.38	0.58	17.14
2007	5.45	2.44	7.89	6.94	1.33	8.27	0.180	0.22	0.40	16.55

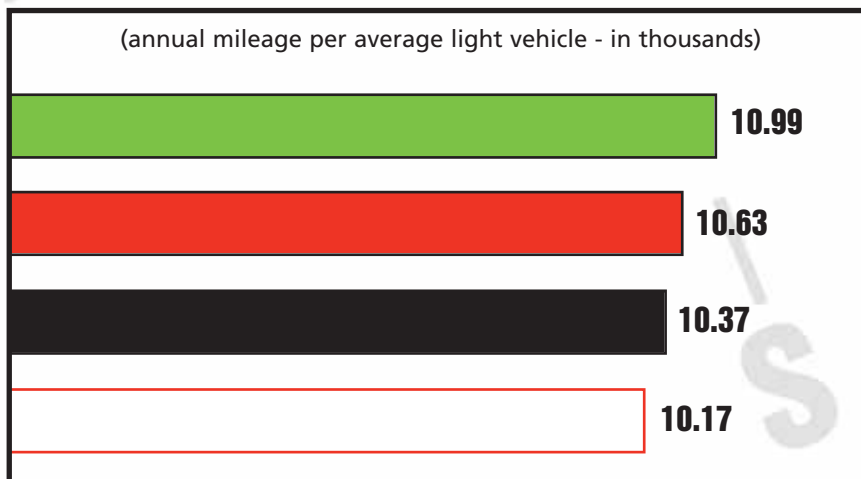
(Source: AATA)

North American Vehicle Sales (number of units)

Year	U.S. Total	Canada Total	Mexico Total	N. American Total	Percent Change
2000	17,754,479	1,585,791	853,775	20,194,045	3.2%
2001	17,416,841	1,596,308	918,835	19,931,984	-1.3%
2002	17,095,073	1,730,709	977,616	19,803,398	-0.6%
2003	16,922,014	1,624,022	977,870	19,523,906	-1.4%
2004	17,245,152	1,573,399	1,095,636	19,914,187	2.0%
2005	17,389,709	1,628,030	1,131,768	20,149,507	1.2%
2006	16,993,441	1,665,233	1,140,142	19,798,816	-1.7%
2007	16,397,337	1,688,387	1,092,744	19,160,468	-3.2%
2006/2007	-3.6%	1.4%	-4.2%	-3.2%	--

(Source: AASA)

Projected Average Annual Consumer Driving Miles

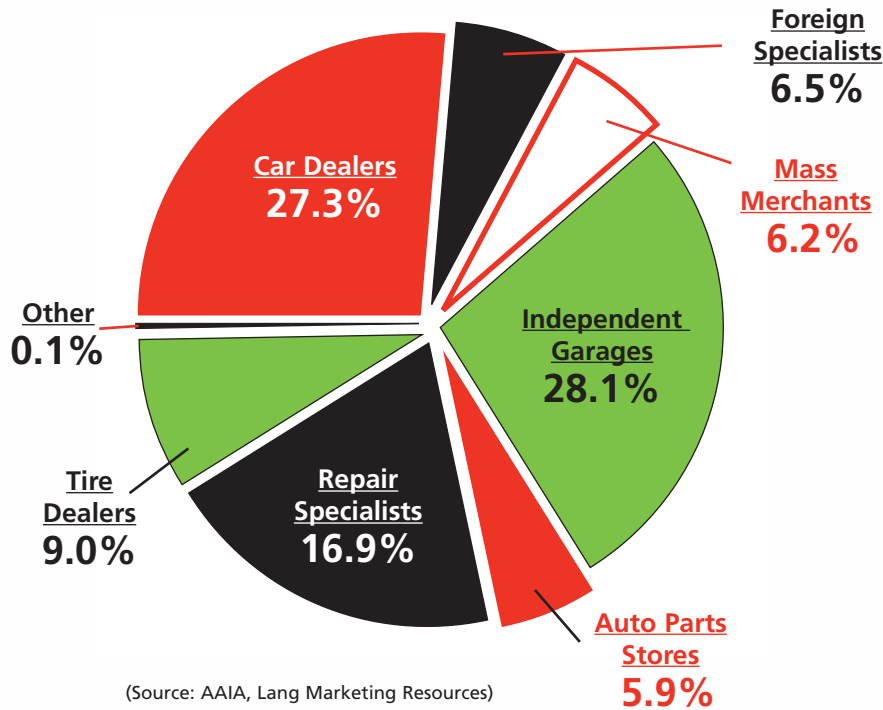


(Source: AATA, Lang Marketing Resources)



Vehicle Service Overview

Vehicle Service Sales: 2007 Marketshare



Vehicle Service as Share of Outlet Sales

(parts and service sales)

	2000	2007	Share Change 2000-2007
Independent Garages	37.6%	40.4%	+2.8%
Car Dealers	45.1%	47.0%	+1.9%
Repair Specialists	42.1%	43.6%	+1.5%
Foreign Specialists	46.8%	47.1%	+0.3%
Tire Dealers	40.0%	41.7%	+1.7%
Auto Parts Stores	41.7%	41.7%	0.0%
Mass Merchants	42.1%	42.1%	0.0%
Other	40.0%	50.0%	+10.0%
Total	41.7%	43.6%	+1.9%

(Source: AAIA, Lang Marketing Resources)



MARKETPROFILE

Vehicle Sales By Type

2007 Top U.S. Passenger Cars

<u>Brand</u>	<u>Model</u>	<u>Sales</u>
Toyota	Camry	473,108
Honda	Accord	392,231
Toyota	Corolla/Matrix	371,390
Honda	Civic	331,095
Chevrolet	Impala	311,128
Nissan	Altima	284,762
Chevrolet.....	Cobalt	200,620
Toyota	Prius	181,221
Ford	Focus	173,213
Pontiac	G6	150,001
Ford	Fusion.....	149,552
Hyundai	Sonata	145,568
BMW.....	3 Series	142,488
Ford	Mustang.....	134,626
Chevrolet	Malibu	128,329
Chrysler.....	300 Series	120,636
Mazda	Mazda 3.....	120,291
Dodge	Charger	119,289
Nissan	Sentra.....	106,522
Dodge	Caliber	101,079

2007 Top U.S. SUVs

<u>Brand</u>	<u>Model</u>	<u>Sales</u>
Honda	CR-V.....	193,600
Toyota	RAV-4	172,752
Ford	Escape	165,596
Chevrolet	Tahoe	146,256
Ford	Explorer	137,817
Chevrolet	TrailBlazer	134,626
Ford	Edge	130,125
Toyota	Highlander	127,878
Jeep	Grand Cherokee.....	120,937
Jeep	Wrangler.....	119,243

2007 Top U.S. Pick-Up Trucks

<u>Brand</u>	<u>Model</u>	<u>Sales</u>
Chevrolet	Silverado/Sierra	826,500
Ford.....	F-Series	634,201
Dodge	Ram	357,707
Toyota	Tundra	196,555
Toyota	Tacoma	173,238

(Source: AASA)