TIRE MARKET PROFILE

SB

It's always hard to hit a moving target, so with all of the shifts and changes and re-directions we've witnessed over the last decade, it's a wonder that a tire dealer or supplier can stay ahead of the curve. To help steady the target, we've compiled this comprehensive Tire Market Profile section.

Combining real-world data from a range of resources with results from TIRE REVIEW's annual Tire Dealer Profile and our editors' best estimates on marketshares, 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, size and operations of today's tire dealer, including a look at tire pricing levels, buying patterns, average gross margins and more.

TOP 25 GLOBAL TIRE MANUFACTURERS – 2011

[Note: Sales figures are from corporate financial reports and estimates. Many companies listed here produce and sell non-tire goods, but amounts shown here are for all revenue. All figures in millions, U.S. dollars.]

Company	Country	2010 Sales	2011 Sales
Continental AG	Germany	$34,500	$40,600
Bridgestone Corp.	Japan	$34,900	$38,903
Groupe Michelin	France	$23,500	$26,829
Goodyear Tire & Rubber Co.	U.S.	$18,800	$22,800
Sumitomo Rubber Industries Ltd.	Japan	$7,400	$8,732
Pirelli & C SpA	Italy	$6,400	$7,323
Yokohama Rubber Corp.	Japan	$6,200	$6,000*
Hankook Tire Co.	South Korea	$5,100	$5,841
Cooper Tire & Rubber Co.	U.S.	$3,300	$3,900
Toyo Tire & Rubber Co.	Japan	$3,500	$3,794
Hangzhou Zhongce Rubber Co.	China	$2,500	$3,520
Cheng Shin Rubber/Maxxis	Taiwan	$2,900	$3,479
Giti Tire (China) Investment Co.	China	$546	$2,890
Triangle Group Co.	China	$3,300	$2,520
Kumho Tire Co.	South Korea	$2,400	$2,450
Apollo Tyres Ltd.	India	$1,900	$2,224
MRF Ltd.	India	$1,800	$1,947
Nokian Tyres plc	Finland	$990	$1,886
Shandong Linglong Rubber Co.	China	$2,200	$1,700
Aeolus Tyre Co.	China	$1,199	$1,580
Double Coin Holdings Ltd.	China	$1,100	$1,560
Titan International	U.S.	$661	$1,487
Xingyuan Tyre Co.	China	$1,000	$1,350
Qingdao Doublestar Industrial Co.	China	$900	$1,310
JK Tyre & Industries	India	$1,300	$1,125

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

TIRE MARKET PROFILE

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DEALER CHANNEL BRAND MARKETSHARE

P-METRIC TIRES

2011 RMA Replacement Shipments: 195.0 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.65%	Uniroyal	2.45%	Pirelli	1.30%
Michelin	8.75%	Kumho	2.40%	Dayton	1.10%
Firestone	8.10%	Continental	2.30%	Nitto	1.10%
Bridgestone	7.75%	Dunlop	2.20%	Sumitomo	0.95%
BFGoodrich	4.75%	Mastercraft	1.90%	Big O	0.85%
Cooper	4.70%	Hercules	1.85%	Sigma	0.80%
General	3.45%	Kelly	1.85%	Fuzion	0.75%
Hankook	2.85%	Cordovan	1.65%	Regul	0.70%
Yokohama	2.75%	Delta	1.50%	Dean	0.60%
Toyo	2.60%	Nexen	1.45%	National	0.50%
Multi-Mile	2.55%	Falken	1.35%	**Others**	**8.55%**

LT-METRIC

2011 RMA Replacement Shipments: 28.5 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	11.20%	Mastercraft	2.55%	Pirelli	1.50%
BFGoodrich	8.80%	Continental	2.45%	Hercules	1.10%
Bridgestone	7.20%	Hankook	2.40%	Maxxis	0.95%
Michelin	7.20%	Uniroyal	2.35%	Nexen	0.85%
Firestone	6.90%	Cordovan	2.25%	Big O	0.75%
Cooper	6.60%	Kelly	1.90%	Eldorado	0.75%
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**	**8.00%**
Toyo	3.05%	Falken	1.50%		

MEDIUM TRUCK

2011 RMA Replacement Shipments: 16.5 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share
Michelin	17.05%	BFGoodrich	2.05%
Bridgestone	14.90%	Hercules	2.05%
Goodyear	12.95%	Toyo	2.05%
Yokohama	9.90%	Cooper/Roadmaster	2.00%
Firestone	8.10%	DynaTrak	1.95%
Continental	5.55%	Kelly	1.95%
Hankook	4.10%	Kumho	1.15%
General	3.90%	Sumitomo	1.05%
Double Coin	3.10%	Gladiator	1.05%
Dunlop	2.45%	**Others**	**2.70%**

(Source: TR Estimates)

TIRE MARKET PROFILE

SB

PERFORMANCE (H-RATED & ABOVE)

2011 RMA Replacement Shipments: 57.1 million
(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share
Goodyear	14.05%
Michelin	12.80%
Bridgestone	8.90%
Yokohama	7.70%
BFGoodrich	6.55%
Falken	6.55%
Kumho	6.35%
Toyo	5.90%
Firestone	5.10%
Dunlop	3.40%
Pirelli	3.25%
Hankook	3.10%
Continental	2.70%
Cooper	2.45%
General	2.25%
Kelly	2.05%
Nexen	1.45%
Sumitomo	1.40%
Uniroyal	1.00%
Nitto	1.00%
Others	**2.05%**

AGRICULTURAL

2011 Industry Replacement Shipments: 2.24 million
(Shares Rounded to Nearest 0.05%)

Rear Tire Segment

Brand	Bias Share	Radial Share
Firestone	43.15%	34.80%
Goodyear	17.55%	30.65%
Titan	18.15%	10.05%
Universal Co-Op	3.00%	4.15%
Michelin	--	9.55%
Harvest King	3.35%	--
BKT	6.55%	6.75%
Alliance	2.25%	1.55%
Trelleborg	1.75%	1.75%
Others	**4.25%**	**0.75%**

Front/Implement Segment

Brand	Dealer Share
Firestone	38.20%
Goodyear	18.55%
Titan	16.80%
Universal Co-Op	5.40%
American Farmer	5.35%
Harvest King	3.60%
BKT	3.55%
Trelleborg	2.00%
Alliance	1.45%
Carlisle	0.50%
Others	**4.60%**

OTR

2011 Industry Replacement Shipments: 198.1 thousand
(Shares Rounded to Nearest 0.05%)

	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%**

(Source: TR Estimates)

TIRE MARKET PROFILE

SB

2011 U.S. TIRE IMPORTS

P-METRIC TIRES

(millions of units)

Country	2011	2010	Y-o-Y Change	2011 Per Tire Value
China	22.38	26.59	-16.6%	$36.41
South Korea	19.52	18.50	5.6%	$60.45
Japan	13.14	15.87	-17.2%	$69.68
Canada	12.46	12.32	1.1%	$66.38
Indonesia	10.23	9.13	12.0%	$43.61
Mexico	9.12	7.16	27.4%	$56.06
Thailand	7.87	6.60	19.3%	$48.97
Taiwan	5.04	4.79	5.2%	$38.89
Brazil	4.35	5.53	-21.3%	$63.16
Germany	3.48	2.54	37.1%	$93.68
Others	13.11	11.62	12.8%	$70.31
TOTAL	**120.46**	**120.65**	**-2.20%**	**$56.35**

LT-METRIC

(millions of units)

Country	2011	2010	Y-o-Y Change	2011 Per Tire Value
Canada	8.75	8.78	-0.34%	$83.05
China	2.95	3.86	-23.6%	$62.48
South Korea	2.46	2.53	-2.8%	$87.59
Japan	2.28	2.42	-5.6%	$102.23
Thailand	1.48	0.86	72.1%	$88.65
Vietnam	0.78	0.83	-6.0%	$64.48
Mexico	0.68	0.23	195.6%	$80.05
Taiwan	0.40	0.41	-2.4%	$86.57
Indonesia	0.36	0.25	43.9%	$78.72
Brazil	0.14	0.16	-12.5%	$90.07
Others	0.32	0.24	33.3%	$106.42
TOTAL	**20.60**	**20.55**	**0.24%**	**$82.77**

MEDIUM TRUCK TIRES

(millions of units)

Country	2011	2010	Y-o-Y Change	2011 Per Tire Value
China	4.86	4.28	13.6%	$167.80
Thailand	1.56	1.08	44.4%	$185.64
Canada	1.44	1.27	13.4%	$260.61
Japan	1.13	1.00	13.0%	$221.59
United Kingdom	0.34	0.31	9.7%	$205.77
South Korea	0.23	0.27	-14.8%	$243.80
Germany	0.20	0.16	25.0%	$226.93
Spain	0.15	0.06	150.0%	$219.93
France	0.14	0.12	16.6%	$261.65
Italy	0.07	0.05	40.0%	$347.11
Others	0.16	0.23	-30.4%	$210.47
TOTAL	**10.29**	**8.84**	**16.40%**	**$197.44**

(Source: U.S. Department of Commerce)

TIRE MARKET PROFILE

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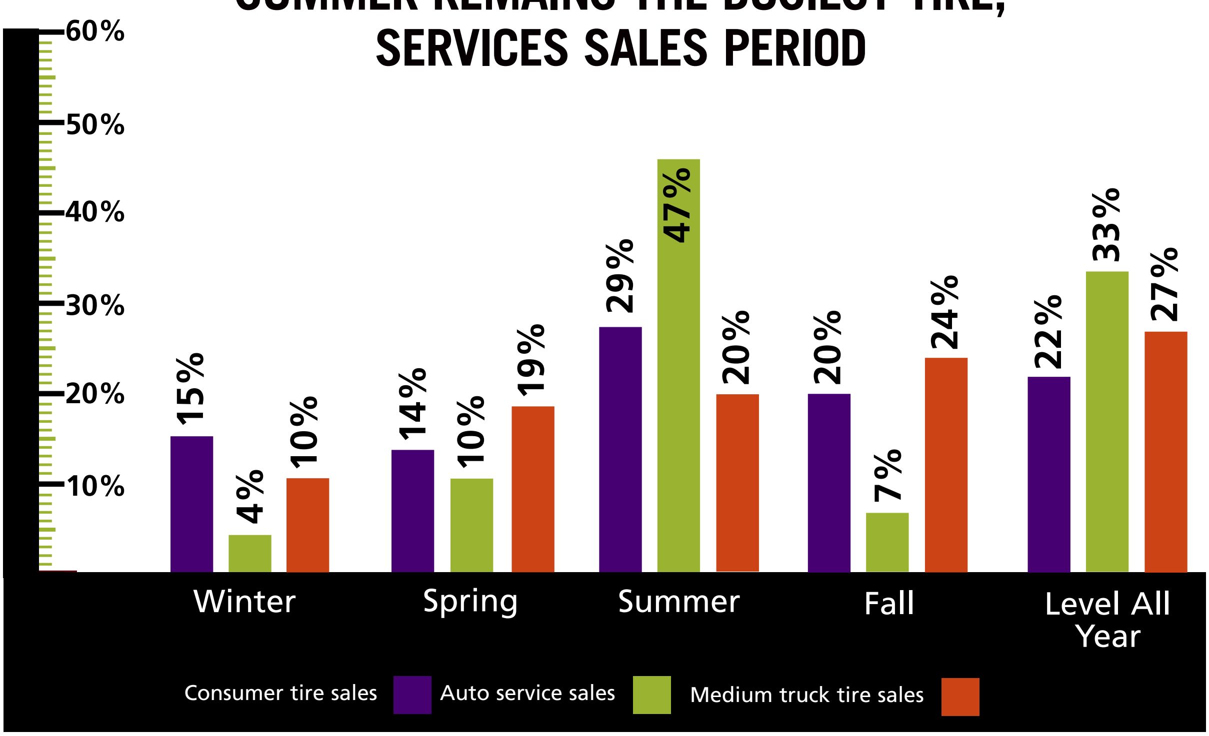
SUMMER REMAINS THE BUSIEST TIRE, SERVICES SALES PERIOD



WHERE DEALERS GET SERVICE PARTS

56.1%	Local parts jobber (NAPA, etc.)
25.4%	Local parts retailer (AutoZone, etc.)
8.4%	Warehouse parts dist.
6.1%	New car dealer (OEM)
0.8%	Tire company
0.5%	Order online
0.4%	Direct from manufacturer
0.1%	Wagon jobber
1.7%	Other source

THE TYPICAL DEALER WROTE...

328 repair orders per month

Billing an average of **$232** per repair order

TIRE MARKET PROFILE

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2011 U.S. TIRE SHIPMENTS

P-Metric (millions of units)

Year	Replacement	OE
2006	196.16	48.18
2007	204.03	46.26
2008	195.10	37.60
2009	189.52	24.60
2010	201.30	33.10
2011	195.00	35.70

(Source: RMA)

Winter (millions of units)

Year	Replacement	OE
2006	8.08	1.06
2007	9.24	1.70
2008	9.50	1.00
2009	8.80	0.70
2010	8.70	1.10
2011	9.50	1.00

(Source: RMA)

LT-Metric (millions of units)

Year	Replacement	OE
2006	33.56	5.01
2007	34.19	4.43
2008	29.40	2.90
2009	27.48	2.79
2010	29.10	3.60
2011	28.50	4.20

(Source: RMA)

Medium Truck (millions of units)

Year	Replacement	OE	Retreads
2006	16.86	6.83	14.70
2007	16.57	4.65	15.20
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

OTR (thousands of units)

	Replacement		OE	
Year	Bias	Radial	Bias	Radial
2006	61.72	74.61	28.03	59.84
2007	62.63	75.51	28.74	60.00
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

Ag/Forestry (millions of units)

	Replacement		OE	
Year	F	R	F	R
2006	1.3	0.71	0.35	0.63
2007	1.3	0.67	0.36	0.65
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

(Source: RMA & TR Estimates)

2011 TOP TIRE SIZES – U.S.

Replacement P-Metric

Rank	Size	Share
1	P225/60R16	3.0%
2	P235/75R15	3.0%
3	P215/60R16	2.7%
4	P205/55R16	2.5%
5	P265/70R17	2.2%
6	P195/65R15	1.9%
7	225/60R16	1.9%
8	P205/65R15	1.8%
9	195/60R15	1.7%
10	215/65R16	1.7%

OE P-Metric

Rank	Size	Share
1	P215/60R16	9.1%
2	P265/70R17	5.1%
3	P215/55R17	4.2%
4	P235/70R16	3.2%
5	P275/65R18	3.0%
6	P235/65R17	2.7%
7	P225/50R17	2.5%
8	P205/65R16	2.3%
9	P265/60R18	2.1%
10	P245/70R17	2.1%

Replacement LT-Metric

Rank	Size	Share
1	LT245/75R16	15.2%
2	LT265/75R16	13.4%
3	LT265/70R17	8.9%
4	LT235/85R16	8.5%
5	LT225/75R16	7.5%
6	LT285/75R16	4.8%
7	31x10.50R15	4.6%
8	LT215/85R16	3.9%
9	LT285/70R17	3.1%
10	LT245/75R17	3.0%

OE LT-Metric

Rank	Size	Share
1	LT245/75R17	22.3%
2	LT245/75R16	15.6%
3	LT225/75R16	11.9%
4	LT265/70R17	7.8%
5	LT265/70R18	7.0%
6	LT275/70R18	6.4%
7	LT275/65R18	5.4%
8	LT235/80R17	4.5%
9	LT275/65R20	4.0%
10	LT245/70R17	3.5%

Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	29.2%
2	11R22.5	22.7%
3	11R24.5	11.7%
4	285/75R24.5	6.3%
5	225/70R19.5	5.6%

OE Medium Truck

Rank	Size	Share
1	295/75R22.5	36.6%
2	11R22.5	28.6%
3	11R24.5	8.9%
4	225/70R19.5	5.5%
5	315/80R22.5	2.4%

(Source: RMA)

TIRE MARKET PROFILE

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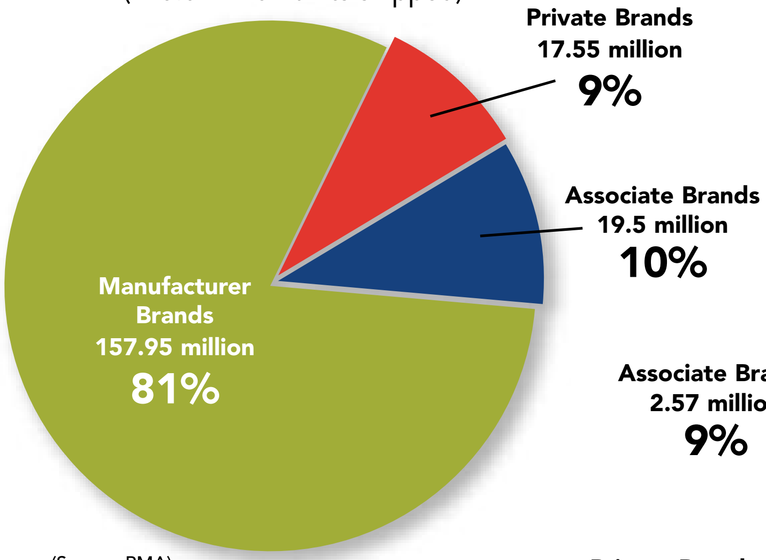
2011 U.S. BRAND-TYPE SHARES

P-METRIC REPLACEMENT

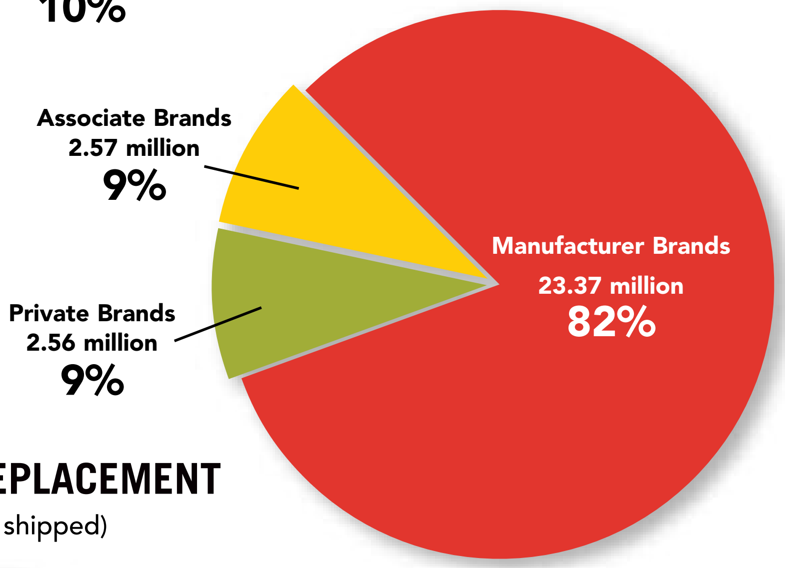
(195.0 million units shipped)



(Source: RMA)

LT-METRIC REPLACEMENT

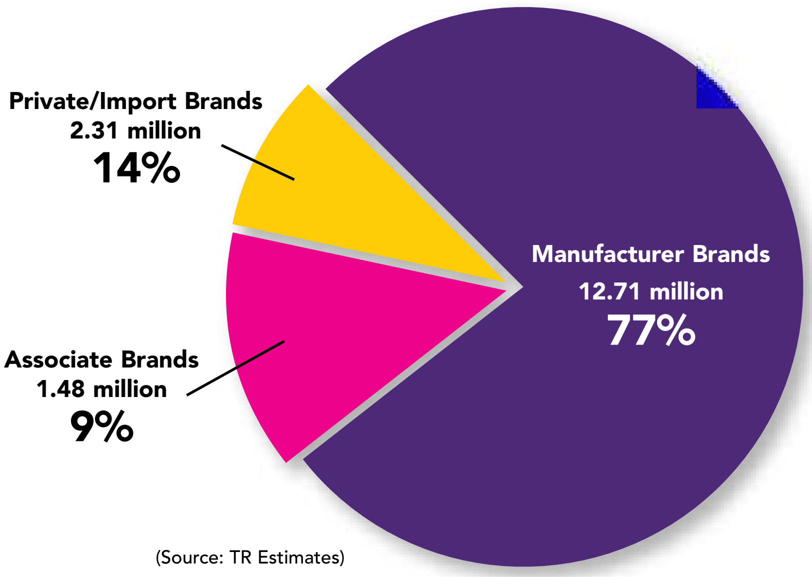
(28.5 million units shipped)



(Source: RMA)

MEDIUM TRUCK REPLACEMENT

(16.5 million units shipped)



(Source: TR Estimates)

TIRE MARKET PROFILE

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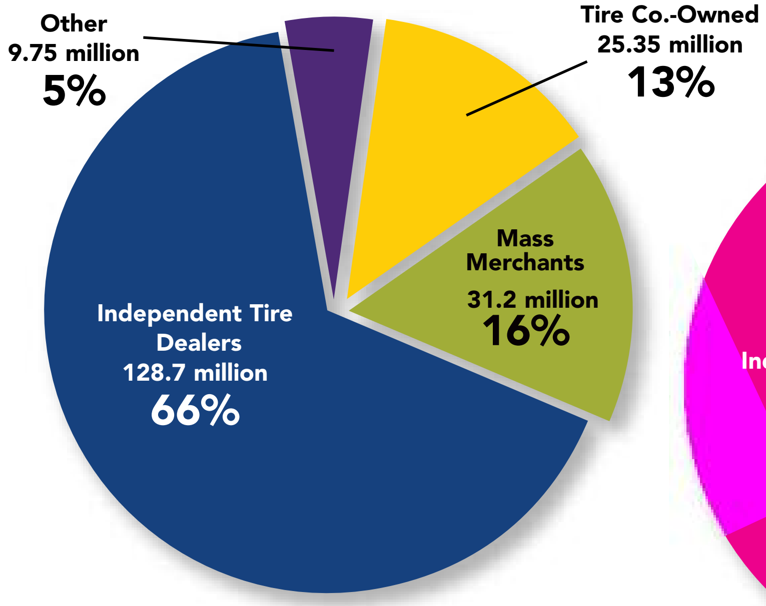
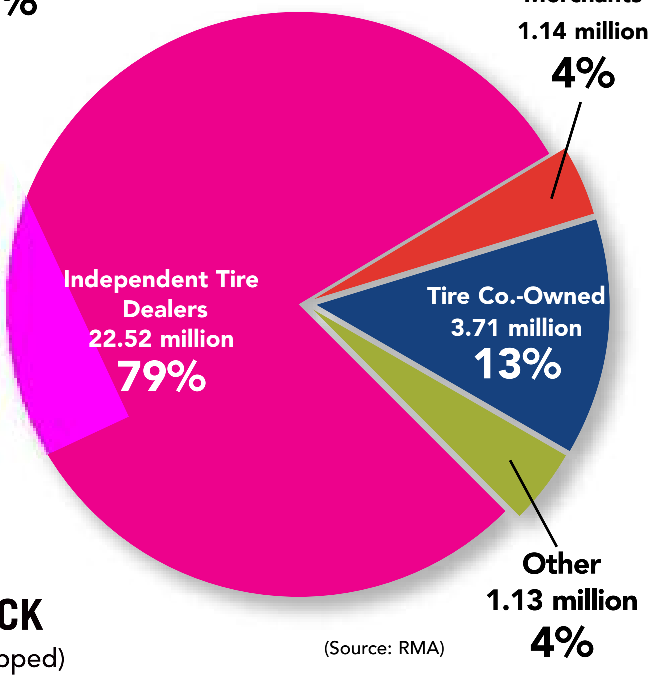
2011 U.S. DISTRIBUTION CHANNEL SHARES

P-METRIC
(195.0 million units shipped)



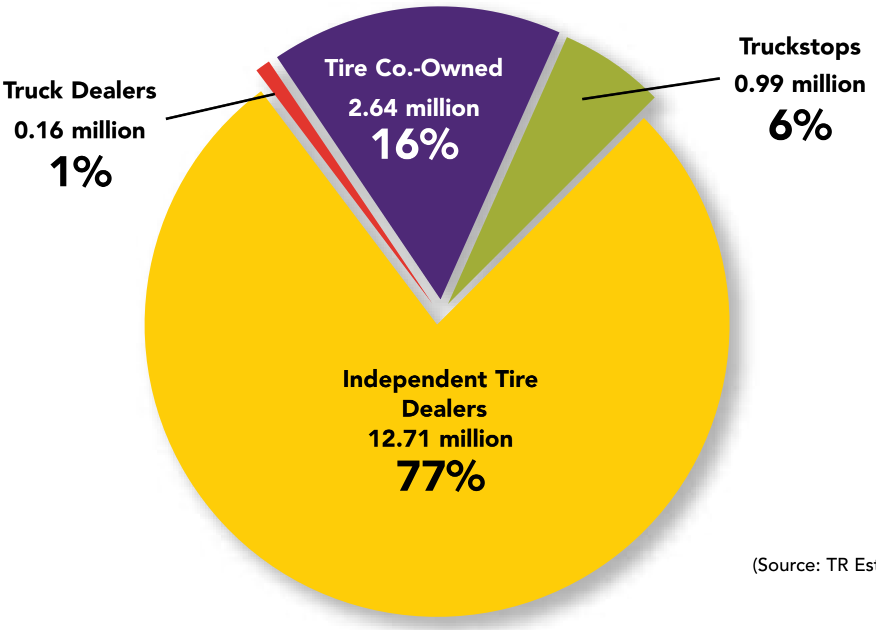
(Source: RMA)

LT-METRIC
(28.5 million units shipped)



(Source: RMA)

MEDIUM TRUCK
(16.5 million units shipped)



(Source: TR Estimates)

TIRE MARKET PROFILE

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2011 CANADA TIRE SHIPMENTS

P-Metric (millions of units)		
Year	Replacement	OE
2006	16.40	11.63
2007	17.39	10.69
2008	20.93	7.65
2009	19.22	6.00
2010	16.12	7.91
2011	20.10	8.40

LT-Metric (millions of units)		
Year	Replacement	OE
2006	2.60	0.64
2007	2.74	0.75
2008	2.53	0.54
2009	2.76	0.10
2010	2.70	0.30
2011	2.78	0.31

Winter (millions of units)	
Year	Replacement
2006	5.29
2007	5.44
2008	6.95
2009	7.55
2010	5.28
2011	4.90

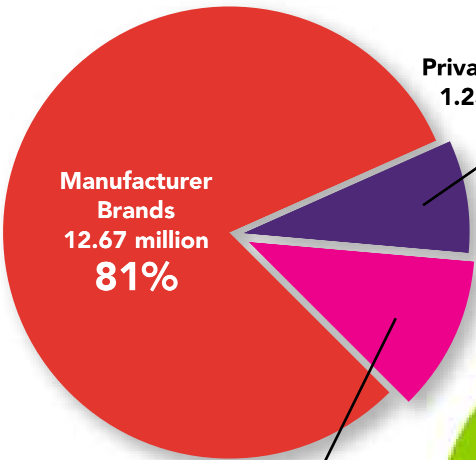
High Performance (millions of units)	
Year	Replacement
2006	1.51
2007	2.37
2008	2.55
2009	2.71
2010	3.11
2011	3.10

Medium Truck (millions of units)		
Year	Replacement	OE
2006	1.49	0.48
2007	1.36	0.38
2008	1.27	0.29
2009	1.36	0.13
2010	1.40	0.15
2011	1.50	0.20

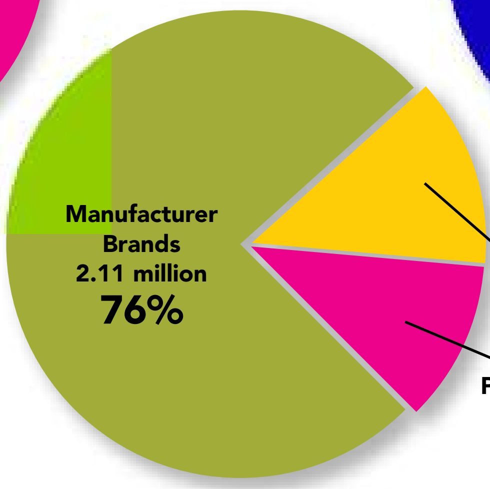
(Source: Rubber Association of Canada and TR Estimates)

2011 CANADA BRAND-TYPE SHARES

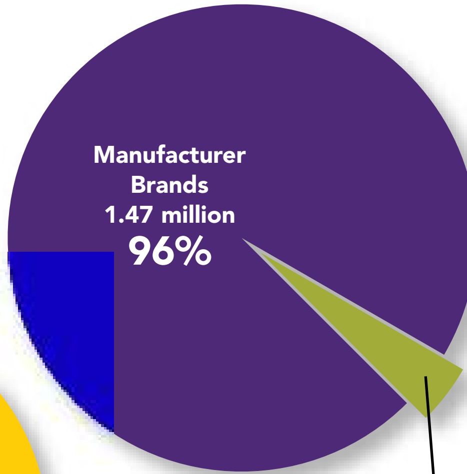
P-METRIC
(Replacement – 15.64 million units shipped)



LT-METRIC
(Replacement – 2.78 million units shipped)



MEDIUM TRUCK
(Replacement – 1.53 million units shipped)



(Source: TR Estimates)

SPEED-RATED TIRE BREAKDOWN

OE MARKET

(% of total 2011 U.S. shipments/millions of units)

Year (Total OE)	H-Rated	V-Rated	Z-Rated	Other Speed Rated
2006	9.1%	12.1%	3.3%	70.3%
(48.18)	4.40	5.81	1.61	33.87
2007	11.7%	12.5%	3.1%	69.7%
(46.26)	5.43	5.79	1.44	32.23
2008	13.8%	14.6%	3.7%	64.1%
(37.60)	5.2	5.5	1.4	24.1
2009	15.0%	15.0%	2.4%	63.0%
(24.60)	3.7	3.7	0.6	15.5
2010	17.9%	13.6%	2.8%	62.0%
(33.10)	5.9	4.5	0.9	20.5
2011	22.1%	12.3%	2.2%	59.4%
(35.7)	7.9	4.4	0.8	21.2

(Source: RMA)

REPLACEMENT MARKET

(% of total 2011 U.S. shipments/millions of units)

Year (Total Replacement)	H-Rated	V-Rated	Z-Rated	Other Speed Rated
2006	15.3%	4.8%	4.9%	57.5%
(196.16)	30.03	9.41	9.54	112.88
2007	15.5%	5.0%	5.2%	55.3%
(204.03)	31.62	10.16	10.60	112.85
2008	15.2%	5.5%	5.3%	53.8%
(195.10)	29.7	10.7	10.4	104.9
2009	14.9%	6.0%	5.6%	54.6%
(189.52)	28.3	11.4	10.6	103.5
2010	15.2%	6.5%	6.0%	53.2%
(201.30)	30.5	13.1	12.1	107.0
2011	15.4%	7.4%	6.5%	52.9%
(195.0)	30.0	14.4	12.7	103.1

(Source: RMA)

VEHICLE REGISTRATIONS, SALES & MILEAGE

U.S. TOTAL REGISTRATIONS
(millions of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
2006	135.05	102.04	3.24	5.12	245.44
2007	135.22	105.69	3.35	5.22	249.49
2008	135.52	106.56	3.42	5.30	250.80
2009	133.05	108.46	3.42	5.20	250.13
2010	130.28	109.74	3.40	5.19	248.60
2011	128.53	111.98	3.29	5.60	249.85

(Source: AAIA)

CANADA TOTAL REGISTRATIONS
(millions of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
2006	11.29	7.20	0.24	0.57	19.30
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

(Source: Statistics Canada, TR Estimates)

U.S. NEW VEHICLE SALES
(millions of units)

	Cars			LT/SUV			Trucks			
Year	Domestic	Import	Total	Domestic	Import	Total	Class 4-6	Class 7-8	Total	Total Vehicles
2006	3.10	4.60	7.70	5.80	3.00	8.80	0.20	0.38	0.58	17.15
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

(Source: AAIA)

U.S. TRAVEL IN MILLIONS OF VEHICLE MILES
(all roads and streets)

Year	Miles
2006	3,002,656
2007	3,029,791
2008	2,973,471
2009	2,979,175
2010	2,970,000
2011	2,960,000

(Source: US Dept. of Transportation)

AVERAGE AGE OF CARS & LIGHT TRUCKS

Year	Passenger Cars	Light Trucks	All Light Vehicles
2006	10.1	8.8	9.7
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

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

U.S. VEHICLE SALES BY TYPE

TOP 10 PASSENGER CAR SALES

Brand/Model	2010	2011	% Change 10/11
Toyota Camry	328,700	308,492	-6.1%
Nissan Altima	224,860	266,399	18.5%
Ford Fusion	219,624	247,938	12.9%
Toyota Corolla	270,100	241,545	-10.6%
Honda Accord	281,834	237,881	-15.6%
Chevrolet Cruze	21,784	228,784	950.2%
Hyundai Sonata	197,363	226,720	14.9%
Honda Civic	259,596	222,432	-14.3%
Chevrolet Malibu	199,729	202,751	1.5%
Volkswagen Jetta	120,532	178,984	48.5%
Top 10 Passenger Car Sales	**2,124,122**	**2,361,926**	**11.2%**
Total U.S. Passenger Car Sales	**5,631,957**	**6,086,835**	**8.1%**
Top 10 as a % of Total Passenger Car Sales	**37.7%**	**38.8%**	

TOP 10 LIGHT TRUCK/SUV SALES

Brand/Model	2010	2011	% Change 10/11
Ford F-Series	500,391	543,491	8.6%
Chevrolet Silverado	366,856	410,141	11.8%
Ford Escape	193,289	253,329	31.1%
Dodge Ram Pickup	189,741	234,120	23.4%
Honda CR-V	203,192	218,380	7.5%
Chevrolet Equinox	147,250	192,733	30.9%
GMC Sierra	128,161	147,984	15.5%
Toyota RAV4	170,652	133,087	-22.0%
Ford Explorer	50,650	132,305	161.2%
Kia Sorento	106,183	129,754	22.2%
Top 10 Light Truck Sales	**2,056,365**	**2,395,324**	**16.5%**
Total U.S. Light Truck Sales	**5,822,019**	**6,550,361**	**12.5%**
Top 10 as a % of Total Light Trucks Sales	**35.3%**	**36.6%**	

(Source: AAIA)

CANADA VEHICLE SALES BY TYPE

TOP 10 PASSENGER CAR SALES

Brand/Model	2010	2011	% Change 10/11
Honda Civic	57,501	55,090	-4.2%
Hyundai Elantra	34,556	44,970	30.1%
Mazda Mazda3	47,740	37,224	-22.0%
Toyota Corolla	38,680	36,663	-5.2%
Chevrolet Cruze	3,184	33,900	964.7%
Volkswagen Jetta	14,758	26,749	81.3%
Ford Focus	23,452	25,736	9.7%
Hyundai Accent	24,017	22,280	-7.2%
Ford Fusion	19,364	18,403	-5.0%
Hyundai Sonata	13,856	16,343	17.9%
Top 10 Passenger Car Sales	**277,108**	**317,358**	**14.5%**
Total Canadian Passenger Car Sales	**705,324**	**693,735**	**-1.6%**
Top 10 as a % of Total Passenger Car Sales	**39.3%**	**45.7%**	

TOP 10 LIGHT TRUCK/SUV SALES

Brand/Model	2010	2011	% Change 10/11
Ford F-Series	97,913	96,325	-1.6%
Dodge Ram Pickup	53,386	62,929	17.9%
Dodge Caravan/Grand Caravan	55,306	53,406	-3.4%
GMC Sierra	45,457	46,680	2.7%
Ford Escape	43,038	44,248	2.8%
Chevrolet Silverado	41,737	40,523	-2.9%
Dodge Journey	23,785	29,021	22.0%
Honda CR-V	24,930	25,076	0.6%
Hyundai Sante Fe	27,882	24,121	-13.5%
Chevrolet Equinox	19,261	22,468	16.7%
Top 10 Light Truck Sales	**432,695**	**444,797**	**2.8%**
Total Canadian Light Truck Sales	**851,797**	**891,784**	**4.7%**
Top 10 as a % of Total Light Truck Sales	**50.8%**	**49.9%**	

(Source: AAIA)

TIRE MARKET PROFILE

SB

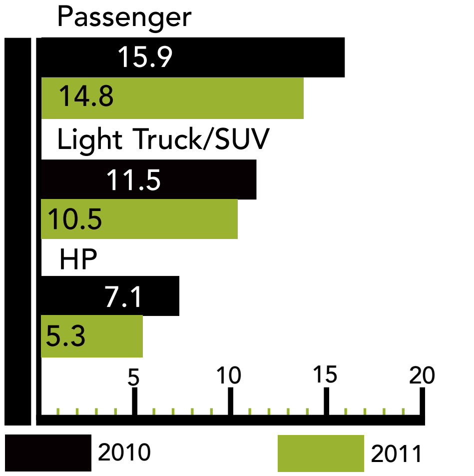
WHAT CONCERNS DEALERS MOST

most important 0 — 1 — 2 — 3 least important

1.2	Profitability
1.2	Customer retention
1.4	Getting/keeping qualified employees
1.4	Tire pricing by suppliers
1.5	Cost of wages/benefits
1.6	Cost of business insurance
1.7	Price competition from other tire dealers
1.8	Tire supply/fill rates
1.9	Vehicle service information availability
1.9	National/State legislation
2.0	SKU Proliferation
2.1	Competition from auto dealers
2.1	Competition from mass merchants/warehouse clubs
2.1	The health of tire companies
2.3	Tire companies buying dealers

WHAT RETAIL DEALERS SELL EACH DAY

(average tires sold per day 2011 vs. 2010)



HOW DEALER INFLUENCES CONSUMER BUYING DECISION

34.7% Customers ask for a specific tire brand, and...
60.4% Will listen to dealer recommendation, but...
13.7% Won't switch at all

24.4% Replace OE tire with exact same tire

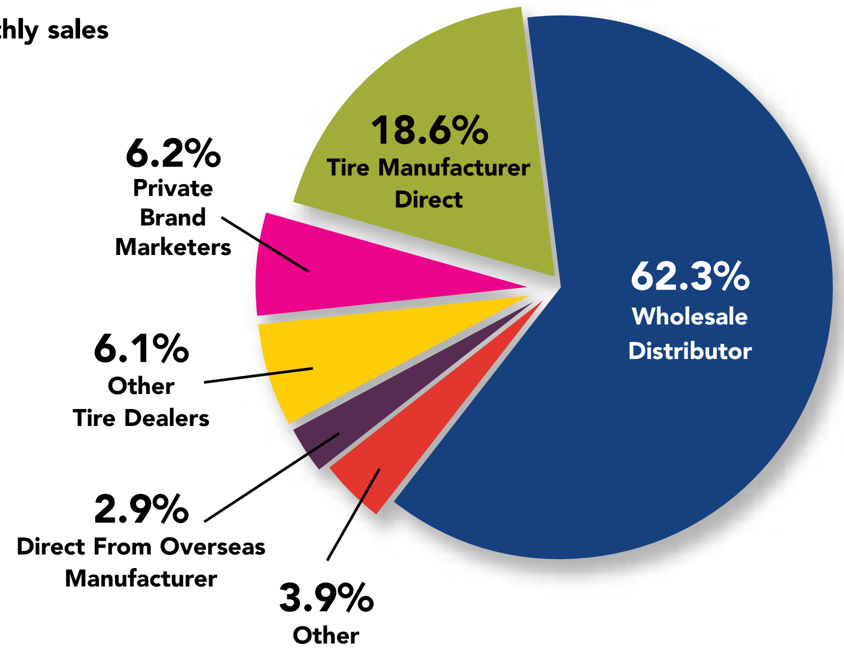
TIRE MARKET PROFILE

SB

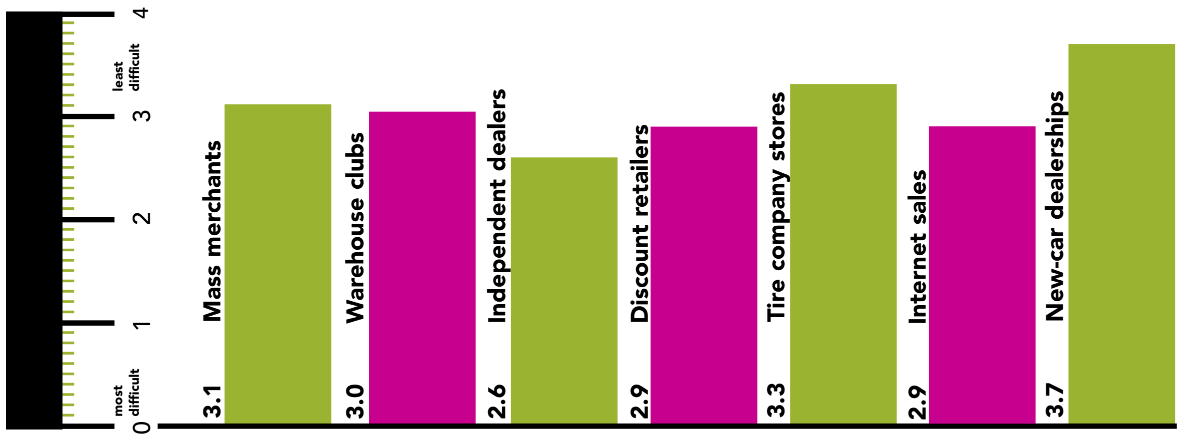
WHAT REPEAT CUSTOMERS MEAN TO TIRE/SERVICE SALES

% of Dealers Say Repeat Cutomers Represent…	…% of monthly sales
74% of dealers	51%+ of monthly sales
16%	41%-50%
6%	31%-40%
1%	21%-31%
2%	11%-20%
1%	1%-10%

WHERE DEALERS GET CONSUMER TIRES



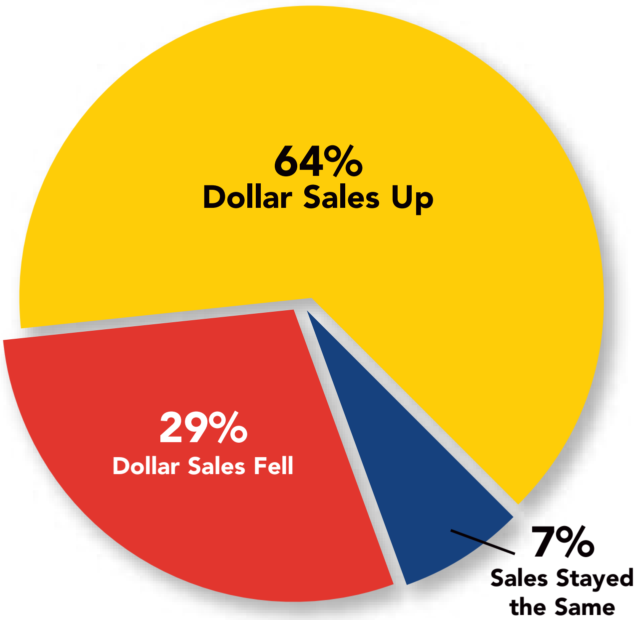
WHO DEALER SEES AS MOST DIFFICULT COMPETITION



TIRE MARKET PROFILE

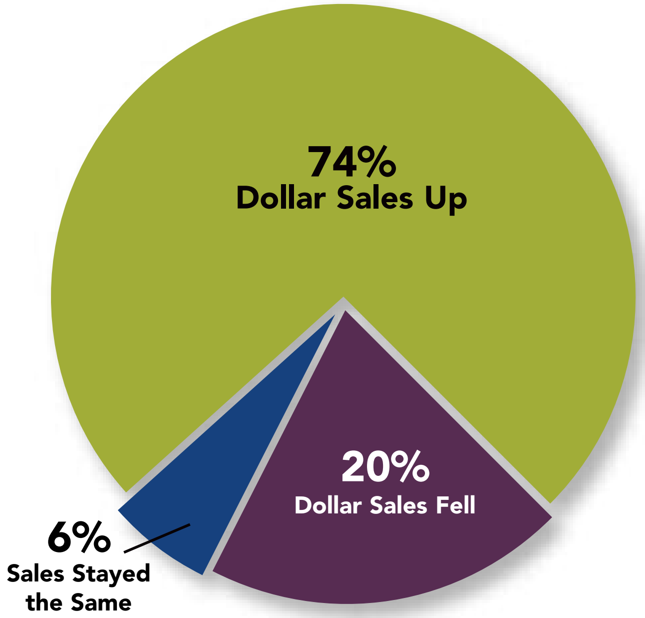
DEALER SALES VOLUME: CONSUMER TIRES

(2011 sales vs. 2010)



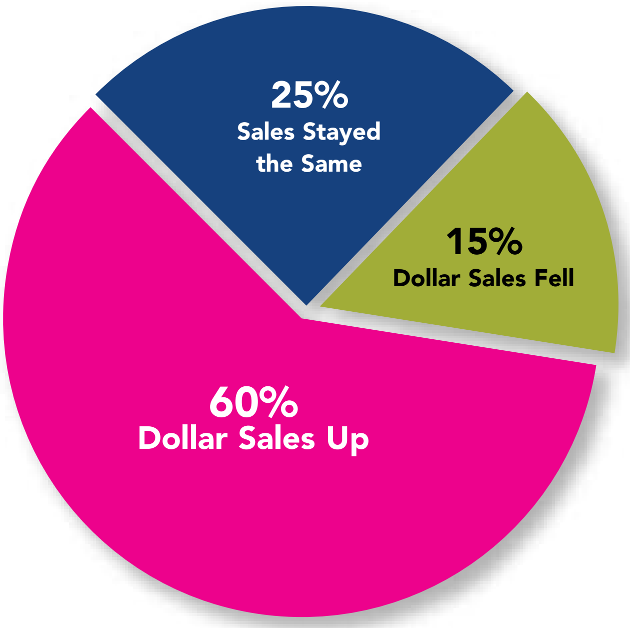
DEALER SALES VOLUME: COMMERCIAL TIRES

(2011 sales vs. 2010)

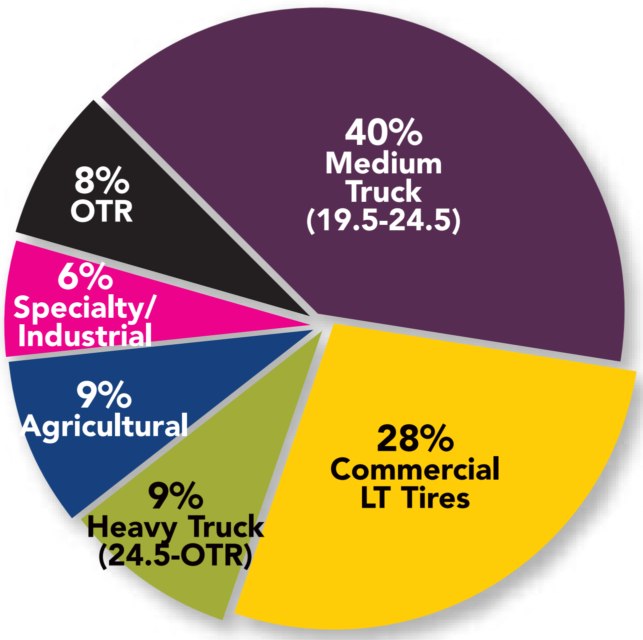


DEALER SALES VOLUME: VEHICLE SERVICE

(2011 sales vs. 2010)



BREAKDOWN OF COMMERCIAL DEALER SALES - 2011



TIRE MARKET PROFILE

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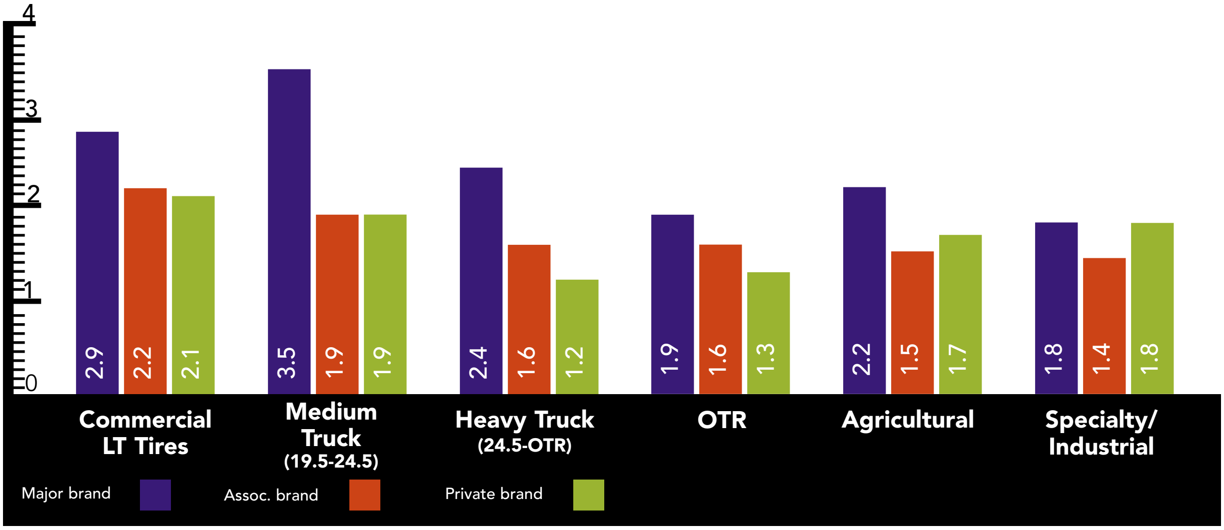
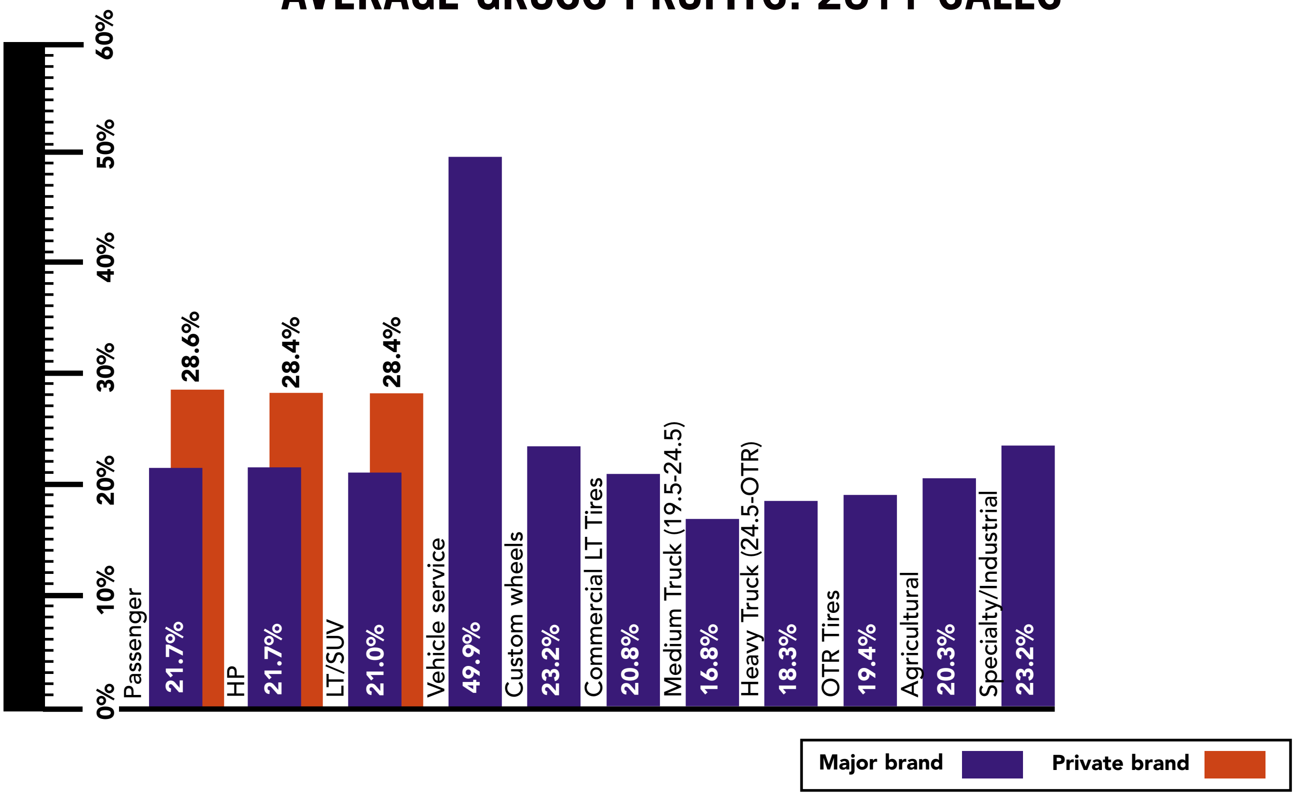
NUMBER OF BRANDS COMMERCIAL DEALERS CARRY



AVERAGE GROSS PROFITS: 2011 SALES



TIRE MARKET PROFILE

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HOW DEALERS ADVERTISE/PROMOTE

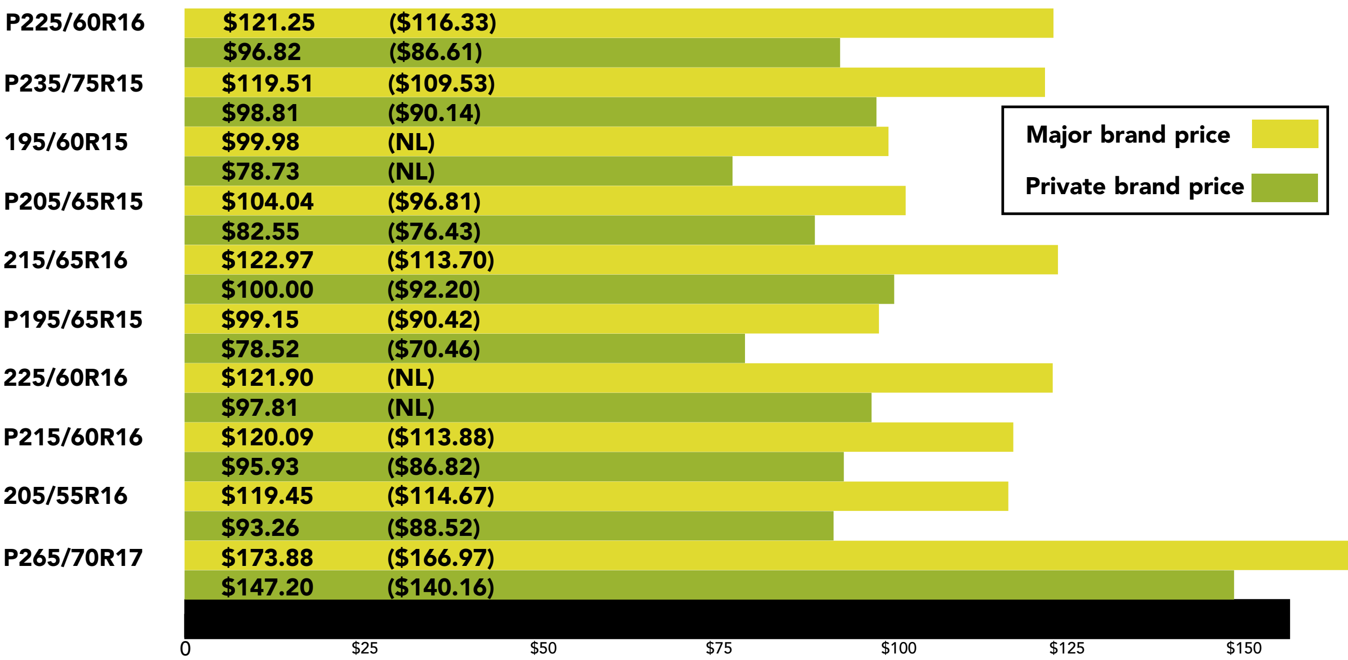
(methods used, parentheses denote 2011 results, more than 100% due to multiple responses)

- 54% (64%) Yellow pages
- 39% (44%) Newspaper ads
- 38% (44%) Direct mail
- 63% (61%) Website
- 29% (23%) Reminder cards
- 43% (30%) Radio ads
- 19% (n/a) Cable TV
- 13% (n/a) Local TV

- 38% (39%) Community service
- 13% (15%) Field sales force
- 35% (29%) Social media
- 8% (10%) Other promotions
- 75% (77%) Word of mouth
- 17% (3%) Smartphone apps/mobile
- 4% (15%) Telemarketing

AVERAGE RETAIL PRICE: REPLACEMENT PASSENGER TIRES

(2011 most popular sizes: RMA)



Figures in parentheses are results from 2011 Tire Dealer Profile study. NL indicates that prices for that size were not tracked last year. Prices are for tires only.

TIRE MARKET PROFILE

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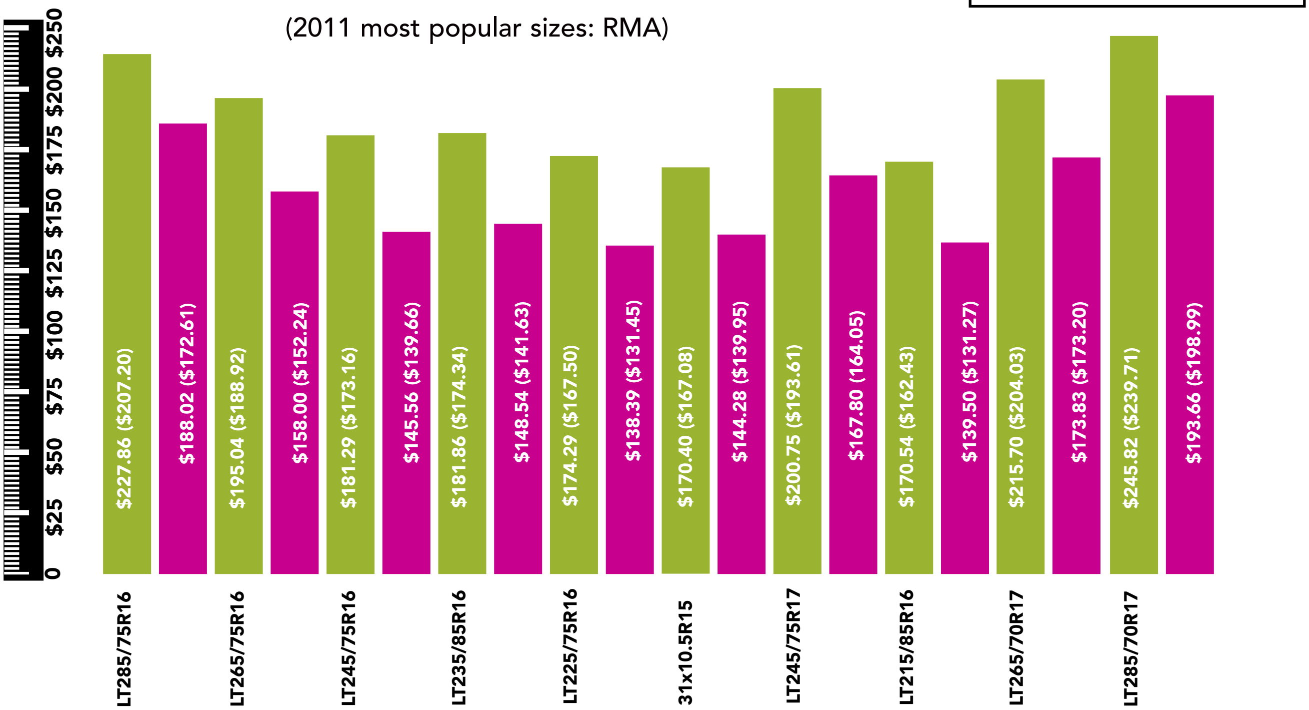
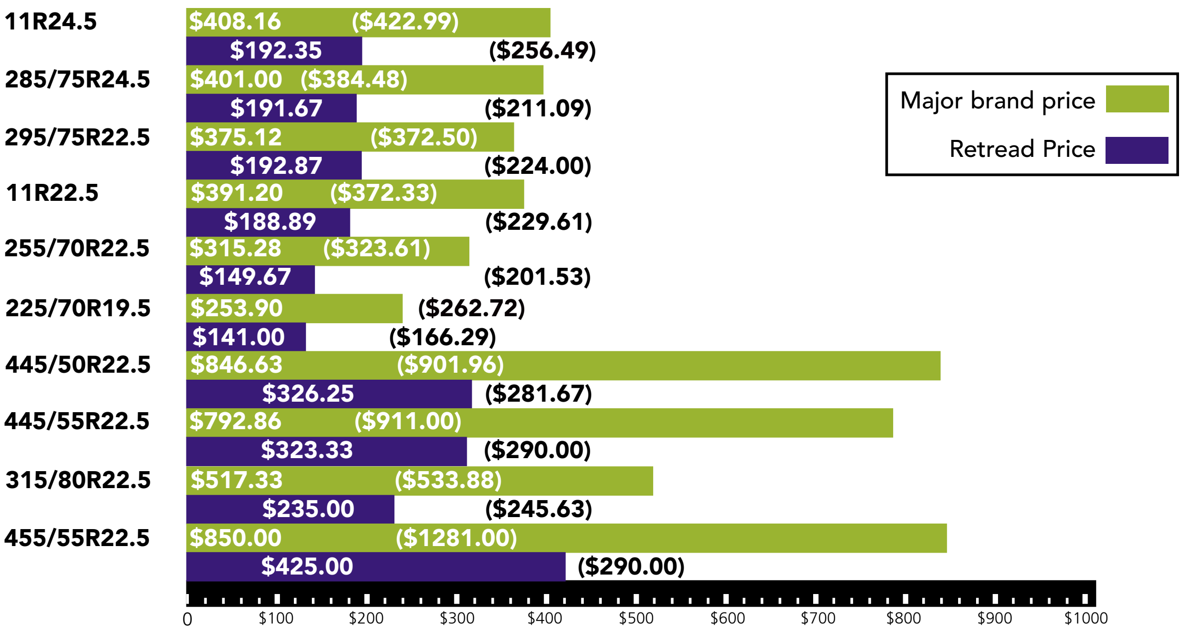
AVERAGE RETAIL PRICE: REPLACEMENT LT/SUV TIRES

(2011 most popular sizes: RMA)



AVERAGE SELLING PRICE: REPLACEMENT MEDIUM TRUCK TIRES

(2011 most popular sizes: RMA)



Figures in parentheses are results from 2011 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.

VEHICLE SERVICES OFFERED BY THE TYPICAL TIRE DEALER

98% Complete brake job
97% Wheel bearings and seals
95% Shock absorber replacement
95% Strut replacement
95% Ball joint replacement
95% Tie rod replacement
95% Oil/filter change
91% Belts and hoses
91% TPMS reset/relearn
91% Two- or four-wheel alignment
91% CV joint replacement
88% Universal joints
87% ABS brake service
86% Turn drums/rotors
83% Suspension spring replacement
83% Engine diagnostic checks
81% Tune-ups
79% Rack and pinion replacement
77% A/C refrigerant recharging
76% Transmission service
74% Cooling system flush/change
69% A/C repair
56% Exhaust system repair
56% Suspension kits

WHAT EQUIPMENT DEALERS USE

(percentage owning or leasing)

92% Computerized tire/wheel balancer
91% Air compressor
89% Above-ground lift
85% Tire changer: standard
85% Battery tester/charger
79% Alignment rack
77% Brake lathe: off-vehicle
75% TPMS reset/recalibrate tool
74% Engine diagnostic analyzer
72% Parts cleaner
70% Tire changer: euro style
60% A/C Refrigerant recycler
51% Service truck
36% Nitrogen inflation system
34% Brake lathe: on-vehicle
25% Tube benders