



MARKET PROFILE

Growth, growth, growth. The North American tire industry is on an uptick, with shipments hitting record levels. And, tire dealers are enjoying a lion's share of the business. The question is: What will ever-shifting market forces do to re-shape the present and future of the tire industry?

What's up one day is down the next, and vice versa. It's this constantly changing landscape, it's 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 shipments for passenger, light truck/SUV, medium truck, OTR, ag/forestry; a look at the OE and replacement segments of the high performance market; the most popular tire sizes at OE and replacement; and brand and channel segmentation, tire and component replacement rates, new vehicle sales and vehicle registrations as well as miles driven by vehicle type.

As an added bonus, TIRE REVIEW presents tire brand market share data – applied strictly to the independent tire dealer channel – covering the passenger, light truck/SUV, medium truck, OTR and ag/forestry tire segments.

Brand Marketshares Dealer Channel

P-Metric Tires

2004 RMA Replacement Shipments: 199.18 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	12.95%	Yokohama	2.20%	Sumitomo	0.75%
Michelin	8.55%	Dunlop	1.95%	Dean	0.70%
Firestone	8.50%	Cordovan	1.85%	Falken	0.65%
Bridgestone	6.85%	Hercules	1.80%	Eldorado	0.60%
Cooper	4.75%	Delta	1.60%	Laramie	0.60%
BFGoodrich	4.70%	Mastercraft	1.55%	Winston	0.55%
General	3.50%	Pirelli	1.15%	Arizonian	0.55%
Multi-Mile	2.90%	Continental	1.05%	Lee	0.50%
Uniroyal	2.65%	Sigma	1.00%	Jetzon	0.50%
Dayton	2.55%	Big O	0.95%	Summit	0.45%
Kelly	2.40%	National	0.85%	Vanderbilt	0.35%
Toyo	2.40%	American Radial	0.80%	Others	8.9%
Kumho	2.35%	Regul	0.80%		
Hankook	2.30%				

Performance (H-Rated & Above)

2004 RMA Replacement Shipments: 41.17 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	16.30%	Kumho	4.35%	Kelly	1.65%
Michelin	12.90%	Falken	3.85%	Multi-Mile	1.30%
Bridgestone	8.75%	Pirelli	3.15%	Dayton	1.15%
Yokohama	7.40%	Cooper	2.80%	Big O	0.85%
Toyo	7.15%	Sumitomo	2.60%	Mastercraft	0.45%
BFGoodrich	6.50%	Hankook	2.40%	Nitto	0.30%
Firestone	5.35%	General	2.35%	Others	1.15%
Dunlop	5.15%	Continental	2.15%		



Brand Marketshares Dealer Channel

LT-Metric

2004 RMA Replacement
Shipments: 36.37 million
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	10.30%
BFGoodrich	8.85%
Michelin	7.10%
Bridgestone	7.05%
Cooper	6.80%
Firestone	6.70%
Multi-Mile	5.55%
General	5.25%
Kelly	3.60%
Toyo	2.95%
Mastercraft	2.90%
Cordovan	2.70%
Yokohama	2.45%
Uniroyal	2.35%
Delta	2.20%
Dunlop	1.90%
Continental	1.80%
Dayton	1.80%
Kumho	1.45%
National	1.35%
Pirelli	1.25%
Big O	0.95%
Hercules	0.95%
Hankook	0.90%
Laramie	0.90%
Eldorado	0.85%
Mickey Thompson	0.55%
Maxxis	0.45%
ProComp	0.30%
Remington	0.25%
Jetzon	0.25%
Lee	0.15%
Falken	0.15%
Others	7.05%

Medium Truck

2004 RMA Replacement
Shipments: 16.29 million
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	19.25%
Bridgestone	17.65%
Michelin	16.75%
Firestone	6.85%
Yokohama	5.05%
General	4.80%
Toyo	4.60%
Kelly	2.75%
Sumitomo	2.75%
Dunlop	2.55%
Hankook	2.50%
Continental	2.20%
Kumho	2.20%
Cooper	1.95%
Power King	1.70%
Hercules	1.50%
BFGoodrich	1.20%
Double Coin	0.80%
Others	2.95%

OTR

2004 Industry Replacement
Shipments: 149.21 thousand
Shares Rounded to Nearest 0.05%

Brand	Bias Share	Radial Share
Bridgestone	9.55%	37.70%
Firestone	26.55%	—
Michelin	—	27.35%
Goodyear	28.30%	24.60%
General	18.00%	—
Titan	8.00%	—
Continental	—	3.90%
Others	9.60%	6.45%

Agricultural

2004 Industry Replacement
Shipments: 2.02 million
Shares Rounded to Nearest 0.05%

Brand	Rear Tire Segment	
	Bias Share	Radial Share
Firestone	39.50%	36.60%
Goodyear	14.60%	31.20%
Titan	16.95%	9.70%
Universal	—	—
Co-Op	7.05%	8.90%
Michelin	—	6.25%
Kelly	5.95%	3.15%
BFGoodrich	—	1.95%
Harvest King	5.95%	—
Akuret	3.20%	—
Alliance	2.20%	1.0%
Galaxy	1.95%	—
Denman	1.65%	—
Trelleborg	—	0.70%
Others	1.00%	0.55%

Front/Implement Segment

Brand	Dealer Share
Firestone	37.20%
Goodyear	17.15%
Titan	12.85%
Kelly	8.00%
Harvest King	6.65%
Universal Co-Op	6.15%
American Farmer	5.05%
Denman	3.50%
Galaxy	1.60%
Alliance	0.75%
Others	1.10%

(Source: TR Estimates)



MARKET PROFILE

2004 U.S. Tire Shipments

P-Metric (millions of units)		
Year	Replacement	OE
1999	191.90	61.00
2000	198.87	60.19
2001	190.77	54.56
2002	190.54	57.32
2003	193.61	54.54
2004	199.18	53.00

(Source: RMA)

M+S-Rated (millions of units)		
Year	Replacement	OE
1999	8.66	5.80
2000	8.77	5.59
2001	7.77	2.01
2002	6.28	2.15
2003	6.87	2.21
2004	7.90	2.14

(Source: RMA)

LT-Metric (millions of units)		
Year	Replacement	OE
1999	33.80	8.42
2000	34.33	7.33
2001	31.50	6.15
2002	33.64	8.30
2003	34.49	7.95
2004	36.37	7.35

(Source: RMA)

Medium Truck (millions of units)			
Year	Replacement	OE	Retreads
1999	14.66	6.86	15.81
2000	15.01	5.59	16.10
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

(Source: RMA & TR Estimates)

OTR (thousands of units)				
Year	Replacement		OE	
	Bias	Radial	Bias	Radial
1999	87.32	62.19	23.59	41.88
2000	78.08	61.53	20.09	47.05
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

(Source: TR Estimates)

Ag/Forestry (millions of units)				
Year	Replacement		OE	
	F	R	F	R
1999	1.6	0.82	0.36	0.51
2000	1.6	0.81	0.37	0.52
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

(Source: TR Estimates)

2004 Top Tire Sizes - U.S.

Replacement P-Metric		
Rank	Size	Share
1	P235/75R15	5.7%
2	P225/60R16	4.6%
3	P205/65R15	4.0%
4	P205/70R15	3.4%
5	P215/70R15	3.3%
6	P185/65R14	2.6%
7	P195/70R14	2.1%
8	P205/75R15	1.7%
9	P195/65R15	2.3%
10	P215/70R16	1.6%

OE P-Metric		
Rank	Size	Share
1	P265/70R17	5.9%
2	P215/60R16	6.2%
3	P205/65R15	6.0%
4	P235/70R16	5.4%
5	P245/65R17	4.8%
6	P265/70R16	3.7%
7	P205/60R16	3.5%
8	P245/70R17	2.8%
9	P195/60R15	2.5%
10	P265/65R17	2.0%

Replacement LT-Metric		
Rank	Size	Share
1	LT265/75R16	13.7%
2	LT245/75R16	12.4%
3	LT235/85R16	11.9%
4	31x10.50R15	7.6%
5	LT225/75R16	6.8%
6	LT235/75R15	5.4%
7	LT285/75R16	4.8%
8	LT215/85R16	3.9%
9	30x9.50R15	2.4%
10	33x12.50R15	1.2%

OE LT-Metric		
Rank	Size	Share
1	LT245/75R16	34.4%
2	LT225/75R16	12.3%
3	LT235/85R16	7.0%
4	LT265/75R16	6.9%
5	LT275/65R18	5.6%
6	LT265/70R17	5.1%
7	LT215/85R16	4.8%
8	30x9.50R15	2.6%
9	LT315/70R17	2.0%
10	LT235/75R16	1.8%

Replacement Medium Truck		
Rank	Size	Share
1	295/75R22.5	20.7%
2	11R22.5	18.0%
3	11R24.5	12.0%
4	285/75R24.5	8.0%
5	225/70R19.5	3.6%

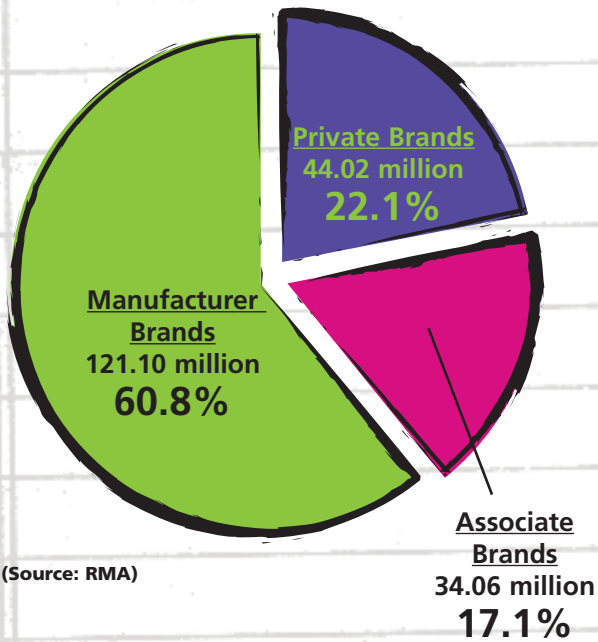
OE Medium Truck		
Rank	Size	Share
1	295/75R22.5	36.1%
2	11R22.5	23.9%
3	225/70R19.5	8.1%
4	11R24.5	7.5%
5	285/75R24.5	4.2%

(Source: RMA)

2004 U.S. Brand-Type Shares

P-Metric Replacement

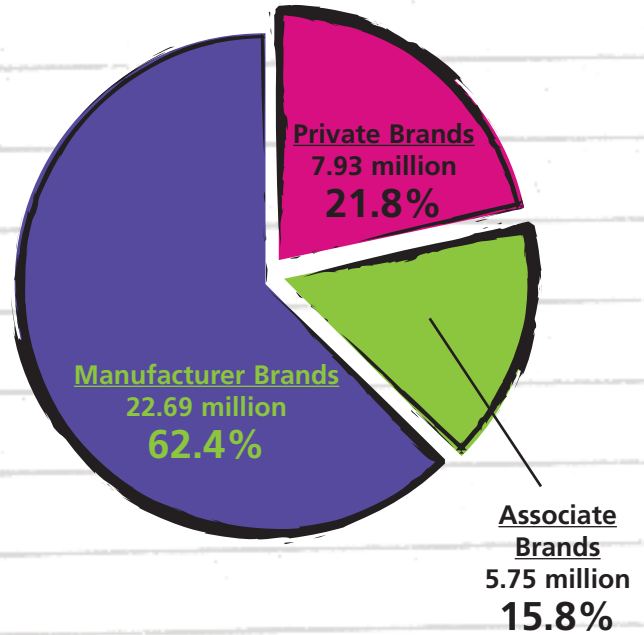
(199.18 million units shipped)



(Source: RMA)

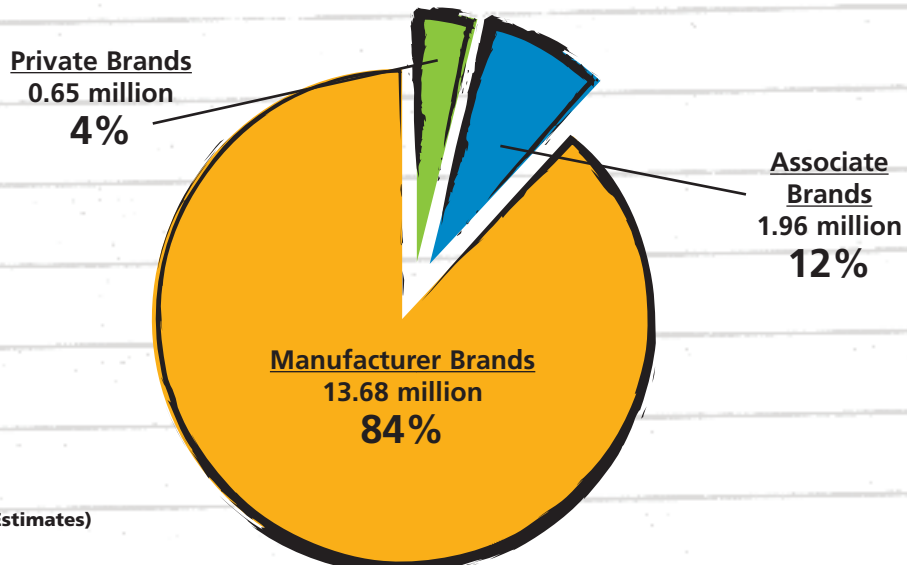
LT-Metric Replacement

(36.37 million units shipped)



Medium Truck Replacement

(16.29 million units shipped)

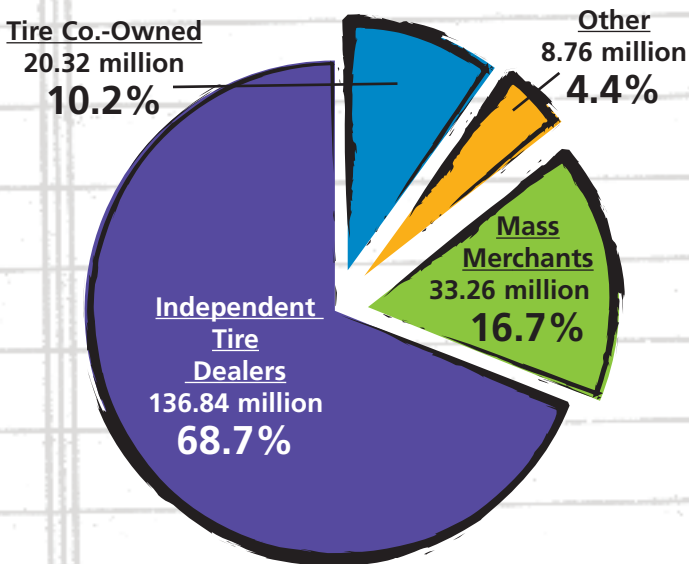


(Source: TR Estimates)

2004 U.S. Distribution Channel Shares

P-Metric

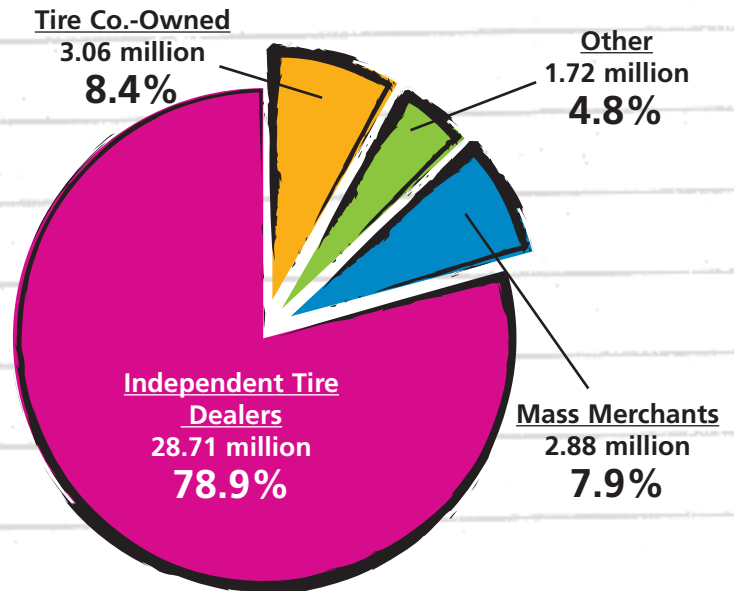
(199.18 million replacement units shipped)



(Source: RMA)

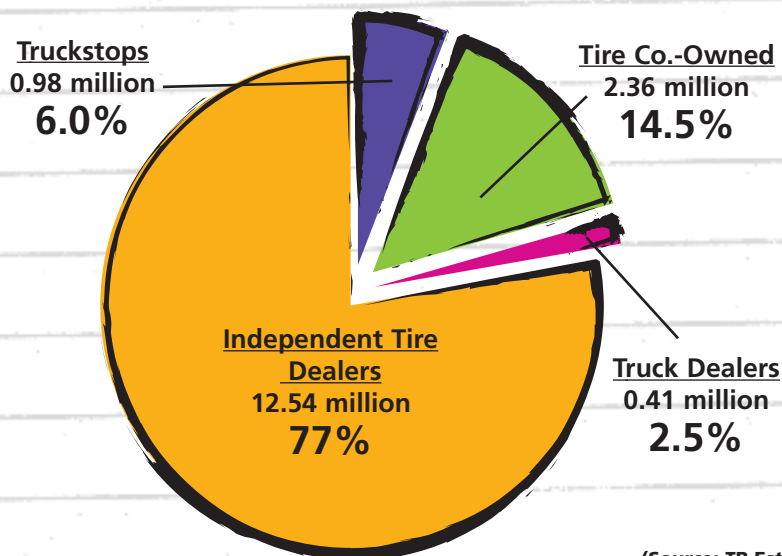
LT-Metric

(36.37 million replacement units shipped)



Medium Truck

(16.29 million replacement units shipped)



(Source: TR Estimates)



MARKET PROFILE

P-Metric (millions of units)

Year	Replacement	OE
1999	14.66	13.82
2000	14.82	13.47
2001	15.67	10.98
2002	16.17	11.14
2003	16.33	11.30
2004	16.68	12.63

(Source: Rubber Association of Canada)

LT-Metric (millions of units)

Year	Replacement	OE
1999	2.44	0.51
2000	2.37	0.47
2001	2.44	0.90
2002	2.63	0.88
2003	2.62	0.80
2004	2.62	0.72

(Source: Rubber Association of Canada)

2004
Canada
Tire
Shipments

Winter (millions of units)

Year	Replacement
1999	3.92
2000	3.75
2001	4.16
2002	4.46
2003	4.43
2004	5.17

(Source: Rubber Association of Canada)

Medium Truck (millions of units)

Year	Replacement	OE
1999	1.49	0.81
2000	1.44	0.66
2001	1.34	0.43
2002	1.48	0.48
2003	1.39	0.42
2004	1.51	0.56

(Source: Rubber Association of Canada)

2004 Top Replacement Tire Sizes - Canada

P-Metric Tires

Rank	Size	Share
1	P185/65R14	8.1%
2	P215/70R15	7.6%
3	P205/70R15	7.2%
4	P225/60R16	6.9%
5	P195/65R15	5.8%
6	P205/65R15	4.7%
7	P195/70R14	4.6%
8	P185/70R14	3.5%
9	P175/65R14	3.4%
10	P205/75R14	3.3%

Performance Tires

Rank	Size	Share
1	P225/60R16	5.2%
2	205/55R16	4.7%
3	P205/55R16	4.6%
4	P195/60R15	4.0%
5	P195/65R15	3.6%
6	195/65R15	3.3%
7	P205/60R16	3.2%
8	205/65R15	2.4%
9	195/60R15	2.4%
10	P195/60R14	2.3%

Winter Tires

Rank	Size	Share
1	P185/65R14	4.7%
2	195/65R15	3.9%
3	P195/65R15	3.5%
4	P215/70R15	3.4%
5	185/65R15	2.8%
6	P175/65R14	2.8%
7	P205/70R15	2.7%
8	P225/60R16	2.7%
9	185/65R14	2.6%
10	P195/70R14	2.6%

LT/SUV Tires (P- and LT-Metric)

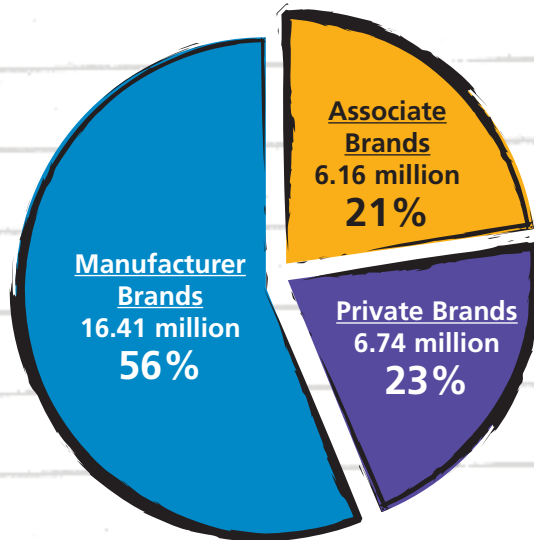
Rank	Size	Share
1	LT245/75R16	12.7%
2	LT265/75R16	8.9%
3	LT235/85R16	8.5%
4	P235/75R15	8.2%
5	LT225/75R16	6.0%
6	LT235/75R15	4.3%
7	P245/75R16	2.6%
8	P235/70R16	2.3%
9	31x10.50R15	2.2%
10	LT285/75R16	2.1%

(Source: Rubber Association of Canada)

2004 Canada Brand Type Shares

P-Metric

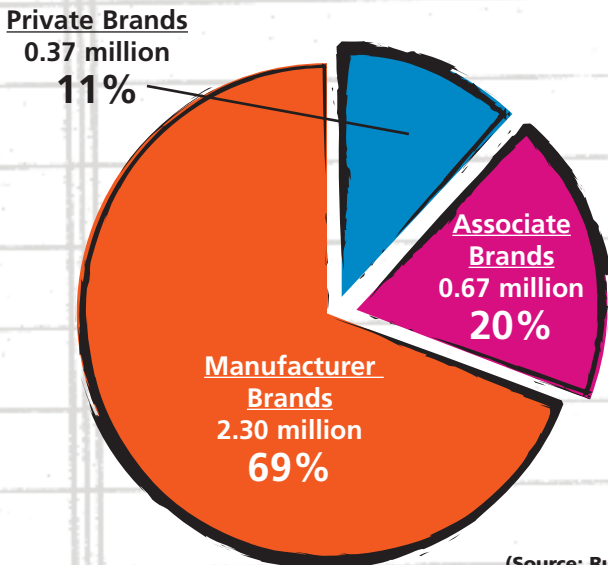
(OE & Replacement –
29.31 million units shipped)



(Source: Rubber Association of Canada)

LT-Metric

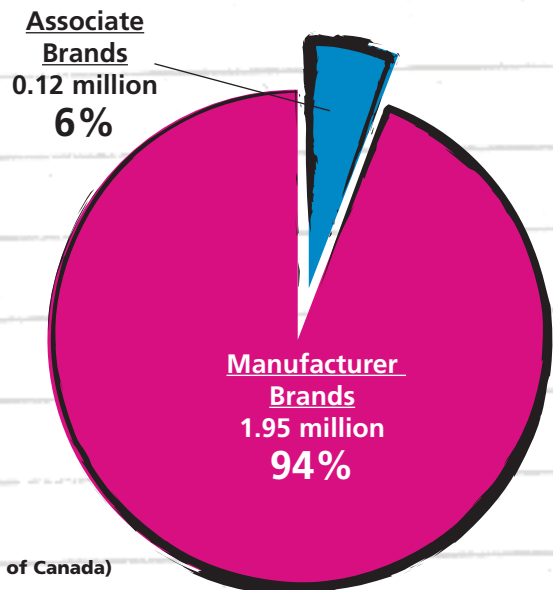
(OE & Replacement –
3.34 million units shipped)



(Source: Rubber Association of Canada)

Medium Truck

(OE & Replacement – 2.07 million units shipped)





MARKET PROFILE

Speed-Rated Tire Breakdown

OE Market

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

Year	H-Rated	V-Rated	Z-Rated	Other Speed Rated
1999	7.3%	3.6%	0.85%	73.1%
(61.00)	4.44	2.21	0.52	44.61
2000	9.7%	3.6%	0.80%	71.9%
(60.19)	5.84	2.19	0.48	43.29
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%	78.40%
(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

(Source: RMA)

Replacement Market

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

Year	H-Rated	V-Rated	Z-Rated	Other Speed Rated
1999	8.4%	1.6%	1.2%	59.2%
(191.90)	16.04	3.14	2.31	113.57
2000	8.3%	1.8%	1.6%	61.0%
(198.87)	16.60	3.52	3.18	121.28
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

(Source: RMA)



MARKET PROFILE

Vehicle Sales, Registrations and Use

U.S. Registrations

(millions of vehicles)

Year	Cars	LT/SUVs	Class	Class	Total Vehicles
			4-6 Trucks	7-8 Trucks	
1999	126.87	74.43	2.54	4.20	208.04
2000	127.72	77.56	2.65	4.34	212.28
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

(Source: AAIA)

Canada Registrations

(millions of vehicles)

Year	Cars	LT/SUVs	Class	Class	Total Vehicles
			4-6 Trucks	7-8 Trucks	
1999	10.89	6.18	N/A	N/A	N/A
2000	10.68	6.42	N/A	N/A	N/A
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

(Source: Statistics Canada, TR Estimates)

U.S. Vehicle Sales

(millions of units)

Year	Cars			LT/SUVs			Trucks			Total Vehicles
	Domestic	Import	Total	Domestic	Import	Total	Class	Class	Total	
							4-6	7-8		
1999	6.99	1.76	8.75	7.50	0.71	8.21	0.128	0.39	0.52	17.48
2000	6.94	2.07	9.01	7.62	0.78	8.40	0.128	0.33	0.46	17.86
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	2.19	7.69	8.02	1.20	9.22	0.160	0.28	0.44	17.35

(Source: AAIA)

U.S. Miles Traveled By Vehicle Type

Total Miles Traveled
(billions)

Average Annual Miles Traveled

Year	Total Miles Traveled (billions)					Average Annual Miles Traveled			
	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Miles	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks
1995	1,438	790	63	116	2,423	11,203	12,018	12,482	68,083
1996	1,470	817	64	119	2,482	11,330	11,811	12,167	68,075
1997	1,503	851	67	125	2,560	11,581	12,115	12,637	69,601
1998	1,550	868	68	128	2,625	11,754	12,173	11,861	64,265
1999	1,569	901	70	132	2,691	11,848	11,957	12,199	65,260
2000	1,600	923	71	135	2,747	11,976	11,672	11,897	64,399
2001	1,628	943	72	137	2,781	11,831	11,204	12,702	63,404
2002	1,659	966	76	139	2,856	12,203	11,365	13,430	60,898
2003	1,678	981	79	142	2,880	12,242	11,467	13,687	61,611
2004	1,682	985	81	147	2,895	12,235	11,219	13,971	62,137

(Source: U.S. Dept. of Transportation, TR Estimates)