

The North American tire industry was on an uptick in 2005, with shipments hitting record levels. And tire dealers enjoyed 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. It's this constantly changing landscape that makes it so 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 marketshares in the tire dealer channel; 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; brand and channel segmentation; new vehicle sales and vehicle registrations as well as miles driven by vehicle type.

It's a truly comprehensive look at a dynamic industry.

## Brand Marketshares – Dealer Channel

### P-Metric Tires

2005 RMA Replacement Shipments: 202.31 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear .....	13.00%	Kumho .....	2.40%	Sigma .....	1.00%
Michelin .....	8.60%	Hankook .....	2.40%	Big O .....	0.95%
Firestone .....	8.50%	Kelly .....	2.35%	American Radial .....	0.80%
Bridgestone .....	6.90%	Yokohama .....	2.20%	Falken .....	0.80%
Cooper .....	4.70%	Dunlop .....	1.95%	National .....	0.80%
BFGoodrich .....	4.70%	Mastercraft .....	1.85%	Regul .....	0.80%
General .....	3.40%	Cordovan .....	1.80%	Sumitomo .....	0.80%
Multi-Mile .....	2.90%	Hercules .....	1.80%	Dean .....	0.70%
Uniroyal .....	2.65%	Delta .....	1.60%	<b>Others .....</b>	<b>12.45%</b>
Dayton .....	2.55%	Pirelli .....	1.20%		
Toyo .....	2.45%	Continental .....	1.00%		

### Performance (H-Rated & Above)

2005 RMA Replacement Shipments: 45.62 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear .....	16.30%	Falken .....	3.80%	Dayton .....	1.05%
Michelin .....	12.90%	Pirelli .....	3.20%	Mastercraft .....	0.75%
Bridgestone .....	8.80%	Cooper .....	2.70%	Big O .....	0.65%
Yokohama .....	7.45%	Sumitomo .....	2.60%	Nitto .....	0.55%
Toyo .....	7.20%	Hankook .....	2.45%	Nexen .....	0.35%
BFGoodrich .....	7.00%	General .....	2.15%	Wanli .....	0.30%
Firestone .....	5.30%	Continental .....	2.10%	<b>Others .....</b>	<b>0.30%</b>
Dunlop .....	5.00%	Kelly .....	1.45%		
Kumho .....	4.40%	Multi-Mile .....	1.25%		

## Brand Marketshares – Dealer Channel

### LT-Metric

2005 RMA Replacement Shipments: 36.03 million  
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	10.30%
BFGoodrich	9.20%
Bridgestone	7.10%
Michelin	7.00%
Cooper	6.70%
Firestone	6.70%
Multi-Mile	5.55%
General	5.00%
Kelly	3.50%
Toyo	3.05%
Mastercraft	2.90%
Cordovan	2.60%
Yokohama	2.50%
Uniroyal	2.35%
Dean	2.20%
Delta	2.10%
Dunlop	1.90%
Dayton	1.80%
Continental	1.70%
Kumho	1.60%
Pirelli	1.25%
National	1.20%
Hercules	1.05%
Hankook	1.05%
Big O	0.95%
Laramie	0.90%
Eldorado	0.85%
Mickey Thompson	0.65%
Others	6.35%

### Medium Truck

2005 RMA Replacement Shipments: 17.52 million  
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	19.30%
Bridgestone	17.70%
Michelin	16.80%
Firestone	6.90%
Yokohama	5.05%
General	4.70%
Toyo	4.70%
BFGoodrich	4.00%
Sumitomo	2.75%
Kelly	2.65%
Hankook	2.50%
Dunlop	2.35%
Kumho	2.20%
Continental	2.10%
Cooper	1.85%
Power King	1.70%
Hercules	1.50%
Double Coin	0.70%
Others	0.55%

### Agricultural

2005 Industry Replacement Shipments: 1.97 million  
Shares Rounded to Nearest 0.05%

Brand	Rear Tire Segment	
	Bias Share	Radial Share
Firestone	39.50%	37.00%
Goodyear	13.55%	30.00%
Titan	16.00%	9.50%
Universal		
Co-Op	7.00%	8.50%
Michelin	—	8.00%
Kelly	3.50%	1.50%
BFGoodrich	3.50%	2.50%
Harvest King	4.50%	—
Akuret	3.20%	—
Alliance	2.00%	1.50%
Galaxy	2.50%	—
Denman	2.00%	—
Trelleborg	1.50%	0.50%
Others	1.25%	1.00%

### OTR

2005 Industry Replacement Shipments: 150.32 thousand  
Shares Rounded to Nearest 0.05%

Brand	OTR Segment	
	Bias Share	Radial Share
Bridgestone	9.45%	37.60%
Firestone	26.60%	—
Michelin	—	35.40%
Goodyear	28.35%	24.65%
General	18.05%	—
Titan	8.05%	—
Continental	—	3.75%
Others	9.50%	1.60%

### Front/Implement Tire Segment

Brand	Share
Firestone	37.50%
Goodyear	16.50%
Titan	13.50%
Kelly	7.00%
Harvest King	6.00%
Universal Co-Op	6.50%
American Farmer	5.00%
Denman	3.50%
Galaxy	2.00%
Alliance	1.00%
Trelleborg	0.50%
Others	1.00%

(Source: TR Estimates)

## 2005 U.S. Tire Shipments

### P-Metric

(millions of units)

Year	Replacement	OE
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
2005	202.31	52.73

(Source: RMA)

### M+S-Rated

(millions of units)

Year	Replacement	OE
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
2005	8.45	1.48

(Source: RMA)

### LT-Metric

(millions of units)

Year	Replacement	OE
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
2005	36.03	6.70

(Source: RMA)

### Medium Truck

(millions of units)

Year	Replacement	OE	Retreads
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
2005	17.52	6.24	15.87

(Source: RMA & TR Estimates)

### OTR

(thousands of units)

Year	Replacement		OE	
	Bias	Radial	Bias	Radial
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
2005	61.51	74.49	27.32	59.68

(Source: TR Estimates)

### Ag/Forestry

(millions of units)

Year	Replacement		OE	
	F	R	F	R
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
2005	1.3	0.70	0.34	0.61

(Source: TR Estimates)

## 2005 Top Tire Sizes – U.S.

### Replacement P-Metric

Rank	Size	Share
1	P235/75R15	5.1%
2	P225/60R16	4.7%
3	P205/65R15	3.7%
4	P215/70R15	3.2%
5	P205/70R15	3.1%
6	P185/65R14	2.3%
7	P195/65R15	2.3%
8	P195/70R14	1.8%
9	P215/60R16	1.8%
10	P255/70R16	1.7%

### OE P-Metric

Rank	Size	Share
1	P215/60R16	6.4%
2	P265/70R17	5.0%
3	P205/65R15	4.9%
4	P245/65R17	4.7%
5	P235/70R16	4.2%
6	P195/60R15	3.5%
7	P245/70R17	3.1%
8	P205/60R16	2.9%
9	P225/60R17	2.8%
10	P265/70R16	2.3%

### Replacement LT-Metric

Rank	Size	Share
1	LT265/75R16	13.2%
2	LT245/75R16	12.3%
3	LT235/85R16	11.4%
4	LT225/75R16	6.9%
5	31x10.50R15	6.9%
6	LT285/75R16	4.9%
7	LT235/75R15	4.6%
8	LT215/85R16	3.8%
9	30x9.50R15	2.0%
10	LT265/70R17	1.9%

### OE LT-Metric

Rank	Size	Share
1	LT245/75R16	37.0%
2	LT225/75R16	11.3%
3	LT265/70R17	10.2%
4	LT215/85R16	5.9%
5	LT245/75R17	5.3%
6	LT275/65R18	5.0%
7	30x9.50R15	2.4%
8	LT265/75R16	2.3%
9	LT315/70R17	2.1%
10	37x12.50R16.5	1.8%

### Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	19.8%
2	11R22.5	17.8%
3	11R24.5	11.0%
4	285/75R24.5	6.9%
5	225/70R19.5	3.7%

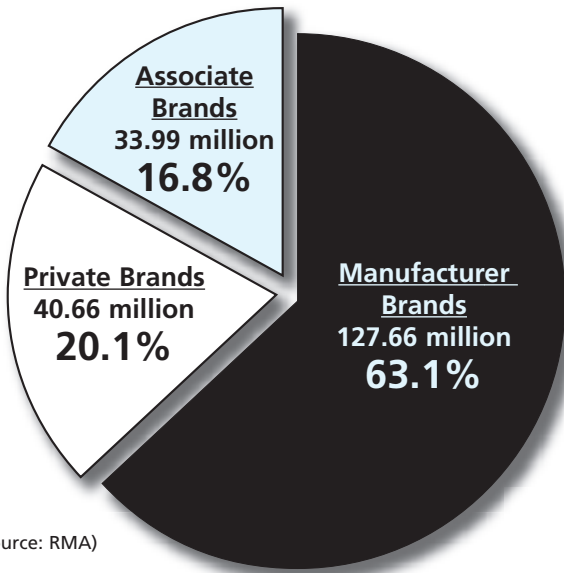
### OE Medium Truck

Rank	Size	Share
1	295/75R22.5	34.8%
2	11R22.5	25.1%
3	11R24.5	8.5%
4	225/70R19.5	7.3%
5	285/75R24.5	3.8%

(Source: RMA)

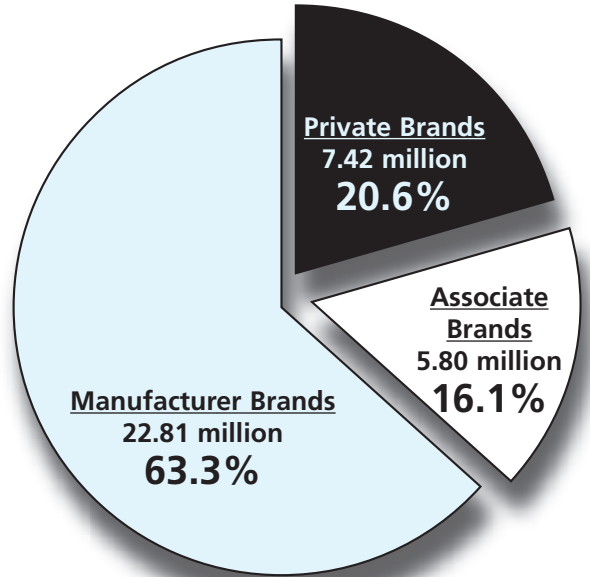
## 2005 U.S. Brand-Type Shares

**P-Metric Replacement**  
(202.31 million units shipped)

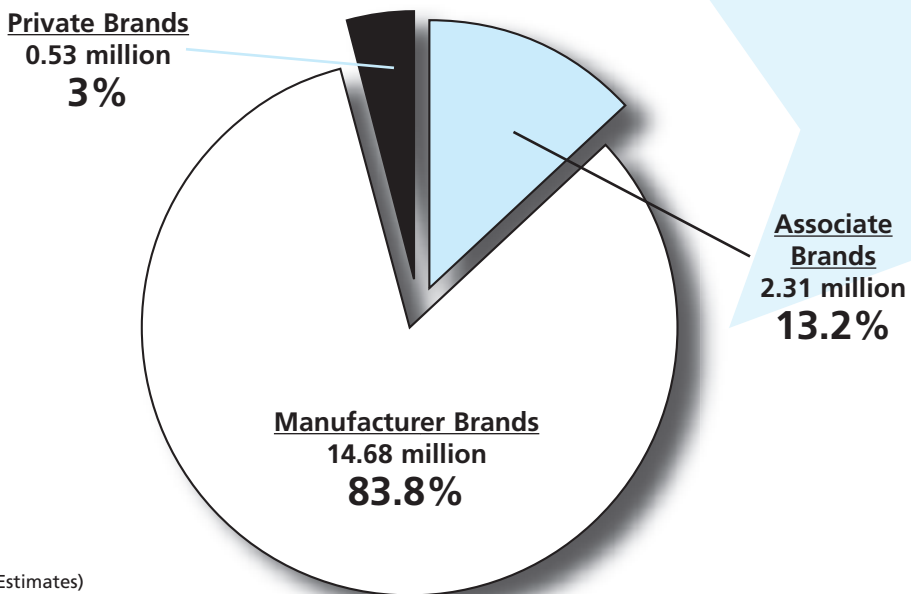


(Source: RMA)

**LT-Metric Replacement**  
(36.03 million units shipped)



**Medium Truck Replacement**  
(17.52 million units shipped)

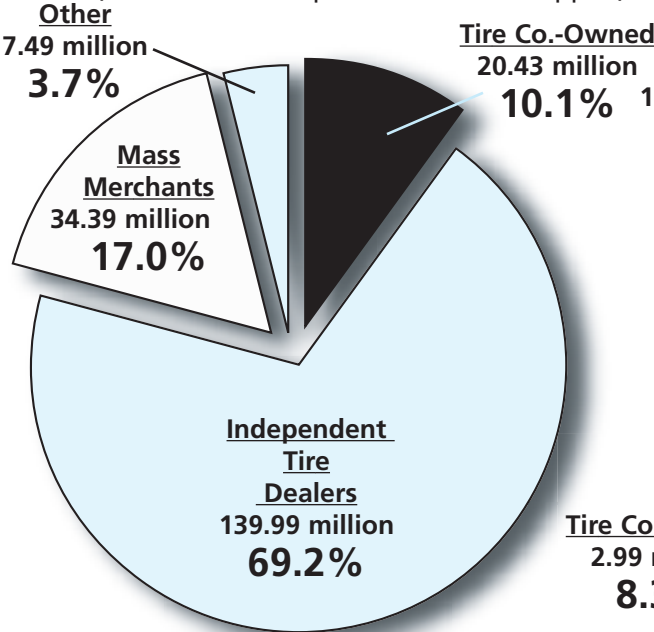


(Source: TR Estimates)

## 2005 U.S. Distribution Channel Shares

### P-Metric

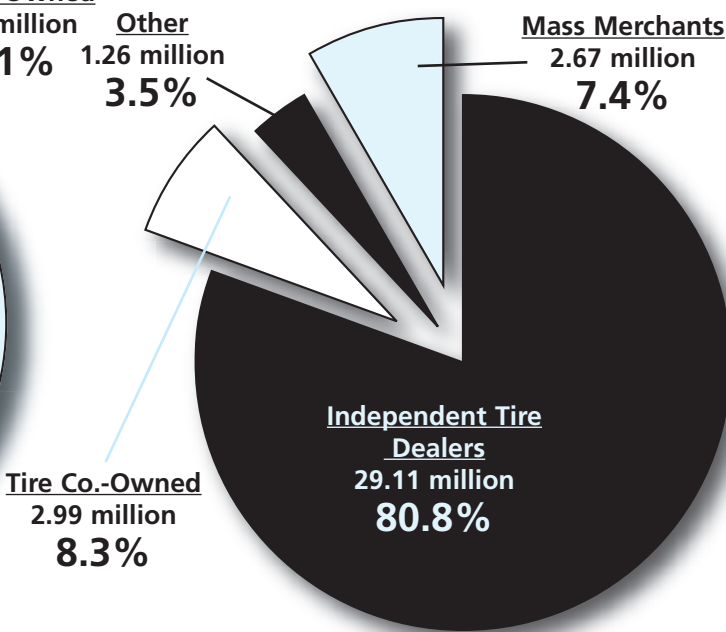
(202.31 million replacement units shipped)



(Source: RMA)

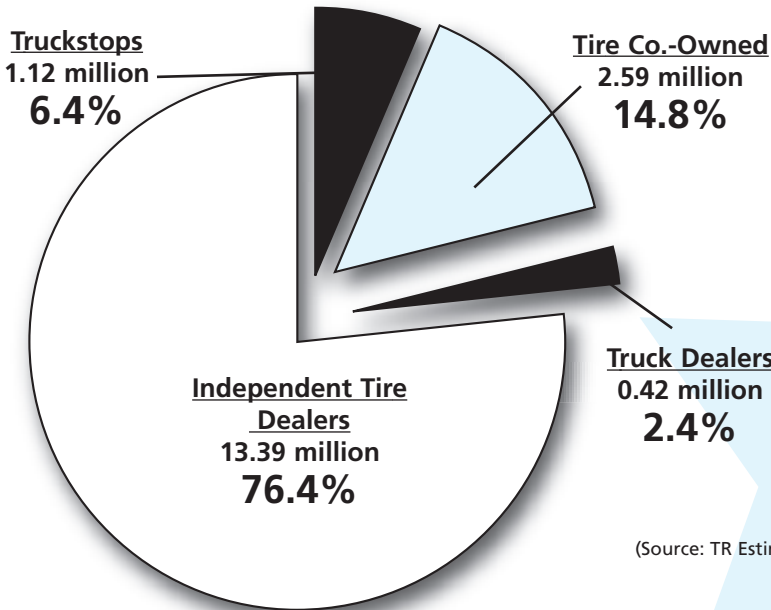
### LT-Metric

(36.03 million replacement units shipped)



### Medium Truck

(17.52 million replacement units shipped)



(Source: TR Estimates)

## P-Metric (millions of units)

Year	Replacement	OE
2000	14.82	13.47
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

(Source: Rubber Association of Canada)

## LT-Metric (millions of units)

Year	Replacement	OE
2000	2.37	0.47
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

(Source: Rubber Association of Canada)

# 2005 Canada Tire

## Shipments

## Winter (millions of units)

Year	Replacement
2000	3.75
2001	4.16
2002	4.46
2003	4.43
2004	5.29
2005	5.97

(Source: Rubber Association of Canada)

## Medium Truck (millions of units)

Year	Replacement	OE
2000	1.44	0.66
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

(Source: Rubber Association of Canada)

# 2005 Top Replacement Tire Sizes – Canada

## P-Metric Tires

Rank	Size	Share
1	P215/70R15	8.1%
2	P185/65R14	7.8%
3	P205/70R15	6.7%
4	P225/60R16	6.6%
5	P195/65R15	6.4%
6	P205/65R15	4.5%
7	P195/70R14	4.5%
8	P185/70R14	3.5%
9	P175/65R14	3.5%
10	P205/75R14	3.0%

## Performance Tires

Rank	Size	Share
1	205/55R16	5.5%
2	P205/55R16	4.3%
3	P225/60R16	4.2%
4	195/65R15	4.0%
5	P195/60R15	2.8%
6	205/50R16	2.7%
7	P205/60R16	2.6%
8	195/60R15	2.6%
9	P195/65R15	2.5%
10	225/45R17	2.3%

## Winter Tires

Rank	Size	Share
1	195/65R15	5.0%
2	P185/65R14	3.8%
3	185/65R14	3.2%
4	205/55R16	3.2%
5	P195/65R15	3.1%
6	P215/70R15	2.8%
7	185/65R15	2.6%
8	P175/65R14	2.6%
9	215/65R16	2.6%
10	215/70R15	2.4%

## LT/SUV Tires

(P- and LT-Metric)

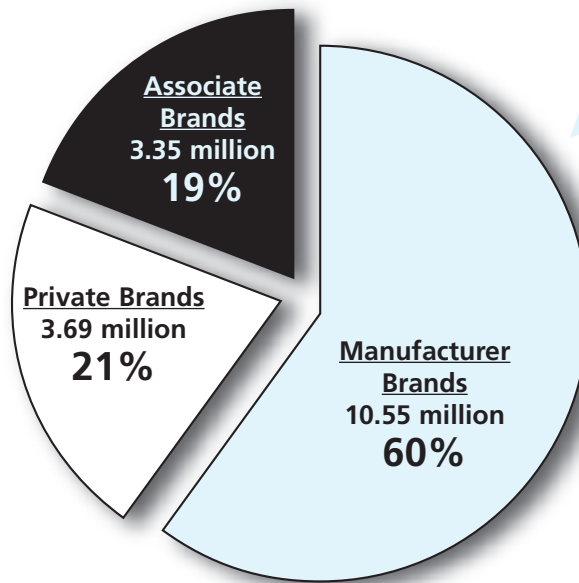
Rank	Size	Share
1	LT245/75R16	12.3%
2	LT265/75R16	8.1%
3	LT235/85R16	7.9%
4	P235/75R15	7.2%
5	LT225/75R16	5.7%
6	LT235/75R15	3.8%
7	LT265/70R17	3.2%
8	P235/70R16	2.4%
9	P245/75R16	2.2%
10	LT285/75R16	2.1%

(Source: Rubber Association of Canada)

## 2005 Canada Brand-Type Shares

### P-Metric

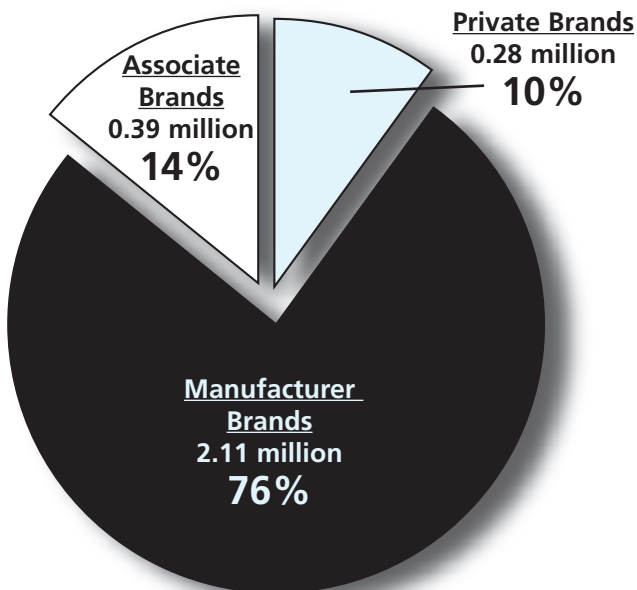
(Replacement – 17.59 million units shipped)



(Source: Rubber Association of Canada)

### LT-Metric

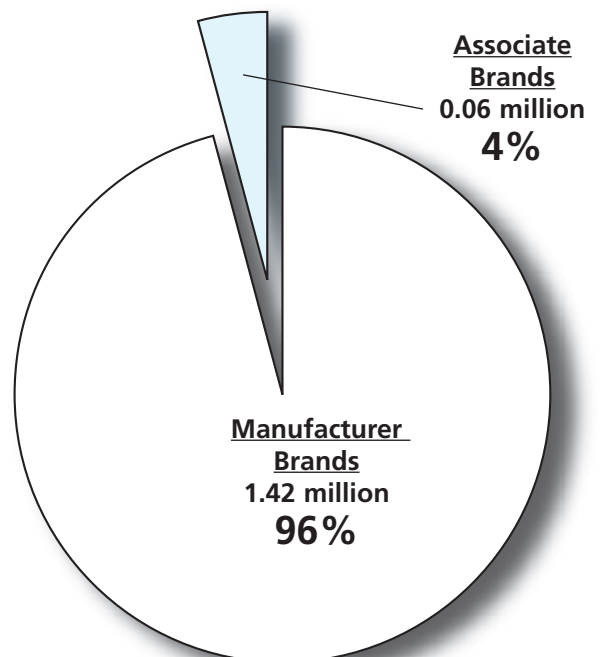
(Replacement – 2.78 million units shipped)



(Source: Rubber Association of Canada)

### Medium Truck

(Replacement – 1.48 million units shipped)



## Speed-Rated Tire Breakdown

### OE Market

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

Year Total OE	H-Rated	V-Rated	Z-Rated	Other Speed Rated
2000 ..... (60.19) .....	9.7% ..... 5.84 .....	3.6% ..... 2.19 .....	0.80% ..... 0.48 .....	71.9% ..... 43.29 .....
2001 ..... (54.56) .....	10.4% ..... 5.67 .....	3.8% ..... 2.09 .....	1.0% ..... 0.56 .....	72.3% ..... 39.46 .....
2002 ..... (57.32) .....	9.7% ..... 5.54 .....	4.6% ..... 2.62 .....	1.6% ..... 0.90 .....	78.1% ..... 44.80 .....
2003 ..... (54.54) .....	8.58% ..... 4.68 .....	6.25% ..... 3.41 .....	2.02% ..... 1.10 .....	78.40% ..... 42.76 .....
2004 ..... (53.00) .....	7.72% ..... 4.09 .....	6.85% ..... 3.63 .....	2.09% ..... 1.11 .....	79.57% ..... 42.17 .....
2005 ..... (52.73) .....	7.60% ..... 4.01 .....	8.52% ..... 4.49 .....	2.64% ..... 1.39 .....	78.46% ..... 41.37 .....

(Source: RMA)

### Replacement Market

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

Year Total Replace.	H-Rated	V-Rated	Z-Rated	Other Speed Rated
2000 ..... (198.87) .....	8.3% ..... 16.60 .....	1.8% ..... 3.52 .....	1.6% ..... 3.18 .....	61.0% ..... 121.28 .....
2001 ..... (190.77) .....	9.4% ..... 18.00 .....	2.0% ..... 3.80 .....	2.0% ..... 3.78 .....	62.2% ..... 118.60 .....
2002 ..... (190.54) .....	11.4% ..... 21.72 .....	2.4% ..... 4.57 .....	2.3% ..... 4.38 .....	59.4% ..... 113.18 .....
2003 ..... (193.61) .....	13.01% ..... 25.19 .....	2.88% ..... 5.57 .....	2.75% ..... 5.33 .....	58.20% ..... 112.68 .....
2004 ..... (199.18) .....	13.74% ..... 27.37 .....	3.45% ..... 6.87 .....	3.48% ..... 6.93 .....	57.40% ..... 114.32 .....
2005 ..... (202.31) .....	14.31% ..... 28.96 .....	4.16% ..... 8.42 .....	4.07% ..... 8.24 .....	60.99% ..... 123.38 .....

(Source: RMA)



## Vehicle Sales, Registrations and Use

### U.S. Registrations

(millions of vehicles)

Year	Cars	LT/SUVs	Class		Total Vehicles
			4-6 Trucks	7-8 Trucks	
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
2005	133.91	98.08	3.08	4.90	239.97

(Source: AAIA)

### Canada Registrations

(millions of vehicles)

Year	Cars	LT/SUVs	Class		Total Vehicles
			4-6 Trucks	7-8 Trucks	
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
2005	11.17	7.19	0.22	0.56	19.14

(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 4-6	Class 7-8	Total	
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	2.24	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

(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
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	12,325	11,287	13,295	73,445
2004	1,682	985	81	147	2,895	12,497	11,044	13,164	72,325
2005	1,701	972	82	149	2,904	12,503	10,987	13,003	72,287

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