



# MARKET PROFILE

Things didn't go very well in the North American tire industry last year. Shipments were down and tiremaker restructuring impacted business, all driven by consumer-level economic pressures and business pressures felt around the globe. Brand marketshares shifted, vehicle sales faltered...all in all it was a brutal year to be a tire dealer.

Still, tire dealers enjoyed a lion's share of the business. But the core question remains: What will continue – and now global – market forces do to re-shape the tire industry?

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 dynamic and comprehensive look at a dynamic and ever-changing global industry.

## Brand Marketshares – Dealer Channel

### P-Metric Tires

2006 RMA Replacement Shipments: 195.77 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	12.85%	Toyo	2.55%	Sigma	0.95%
Michelin	8.70%	Kumho	2.50%	Big O	0.95%
Firestone	8.60%	Kelly	2.30%	Falken	0.90%
Bridgestone	7.00%	Yokohama	2.25%	American Radial	0.80%
BFGoodrich	4.70%	Dunlop	1.95%	Sumitomo	0.80%
Cooper	4.65%	Hercules	1.85%	National	0.75%
General	3.20%	Mastercraft	1.85%	Regul	0.75%
Multi-Mile	2.70%	Cordovan	1.75%	Dean	0.65%
Uniroyal	2.65%	Delta	1.55%	Wanli	0.25%
Dayton	2.55%	Pirelli	1.20%	Others	12.25%
Hankook	2.55%	Continental	1.05%		

### Performance (H-Rated & Above)

2006 RMA Replacement Shipments: 48.98 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	15.25%	Falken	3.95%	Multi-Mile	1.15%
Michelin	12.90%	Pirelli	3.20%	Wanli	1.05%
Bridgestone	8.80%	Cooper	2.60%	Dayton	0.95%
Yokohama	7.45%	Hankook	2.50%	Big O	0.65%
Toyo	7.20%	Sumitomo	2.50%	Nitto	0.60%
BFGoodrich	6.50%	General	2.20%	Mastercraft	0.40%
Firestone	5.30%	Continental	2.10%	Nexen	0.40%
Dunlop	4.95%	Kelly	1.40%	Others	0.20%
Kumho	4.40%	Uniroyal	1.40%		





# MARKET PROFILE

## Brand Marketshares - Dealer Channel

### LT-Metric

2006 RMA Replacement Shipments: 33.65 million  
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	10.30%
BFGoodrich	8.85%
Bridgestone	7.10%
Michelin	7.05%
Firestone	6.70%
Cooper	6.70%
Multi-Mile	5.50%
General	4.90%
Kelly	3.45%
Toyo	3.10%
Mastercraft	2.90%
Cordovan	2.55%
Yokohama	2.55%
Uniroyal	2.35%
Delta	2.05%
Dunlop	1.90%
Dayton	1.75%
Continental	1.70%
Kumho	1.60%
Pirelli	1.25%
Hankook	1.15%
National	1.10%
Hercules	1.10%
Big O	0.95%
Laramie	0.90%
Eldorado	0.85%
Mickey Thompson	0.65%
Others	9.05%

### Agricultural

2006 Industry Replacement Shipments: 2.01 million  
Shares Rounded to Nearest 0.05%

#### Rear Tire Segment

Brand	Bias Share	Radial Share
Firestone	42.50%	37.00%
Goodyear	14.00%	30.00%
Titan	16.00%	9.50%
Universal Co-Op	7.00%	8.50%
Michelin	—	8.00%
Kelly	3.50%	1.50%
BFGoodrich	—	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	1.00%	1.00%

### Medium Truck

2006 RMA Replacement Shipments: 16.87 million  
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	19.25%
Bridgestone	17.80%
Michelin	16.90%
Firestone	6.95%
Yokohama	5.05%
General	4.70%
Toyo	4.70%
Sumitomo	2.75%
Kelly	2.55%
Hankook	2.50%
Dunlop	2.40%
Kumho	2.20%
Continental	2.10%
Power King	1.65%
Hercules	1.55%
BFGoodrich	1.25%
Double Coin	1.10%
Others	4.60%

#### Front/Implement Tire Segment

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

### OTR

2006 Industry Replacement Shipments: 136.33 thousand  
Shares Rounded to Nearest 0.05%

Brand	Bias Share	Radial Share
Bridgestone	9.40%	37.85%
Firestone	26.60%	—
Michelin	—	27.45%
Goodyear	28.25%	24.60%
General	18.15%	—
Titan	8.10%	—
Continental	—	3.75%
Others	9.50%	6.35%

(Source: TR Estimates)





# MARKET PROFILE

## 2006 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	195.77	48.18

(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

(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	33.65	5.01

(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	16.87	6.83	14.70

(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

(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

(Source: TR Estimates)

## 2006 Top Tire Sizes - U.S.

### Replacement P-Metric

Rank	Size	Share
1	P225/60R16	4.5%
2	P235/75R15	4.4%
3	P205/65R15	3.4%
4	P215/70R15	2.9%
5	P205/70R15	2.7%
6	P195/65R15	2.0%
7	P185/65R14	1.9%
8	P215/60R16	1.9%
9	P265/70R17	1.7%
10	P265/70R16	1.6%

### OE P-Metric

Rank	Size	Share
1	P215/60R16	8.2%
2	P265/70R17	4.6%
3	P245/65R17	4.4%
4	P195/60R15	3.8%
5	P235/70R16	3.5%
6	P245/70R17	2.5%
7	P205/55R16	2.5%
8	P205/60R16	2.4%
9	P265/75R16	2.0%
10	P275/55R20	1.8%

### Replacement LT-Metric

Rank	Size	Share
1	LT265/75R16	13.2%
2	LT245/75R16	12.5%
3	LT235/85R16	10.5%
4	LT225/75R16	6.5%
5	31x10.50R15	5.8%
6	LT285/75R16	4.8%
7	LT235/75R15	3.8%
8	LT215/85R16	3.6%
9	LT265/70R17	2.7%
10	30x9.50R15	1.7%

### OE LT-Metric

Rank	Size	Share
1	LT245/75R16	43.3%
2	LT225/75R16	13.2%
3	LT265/70R17	12.1%
4	LT215/85R16	7.8%
5	LT245/75R17	4.9%
6	LT275/65R18	2.8%
7	LT275/65R20	2.7%
8	LT265/75R16	2.4%
9	37x12.50R16.5	2.0%
10	LT315/70R17	1.6%

### Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	20.5%
2	11R22.5	16.9%
3	11R24.5	10.6%
4	285/75R24.5	6.4%
5	225/70R19.5	3.7%

### OE Medium Truck

Rank	Size	Share
1	295/75R22.5	36.1%
2	11R22.5	25.6%
3	11R24.5	8.6%
4	225/70R19.5	7.3%
5	285/75R24.5	3.5%

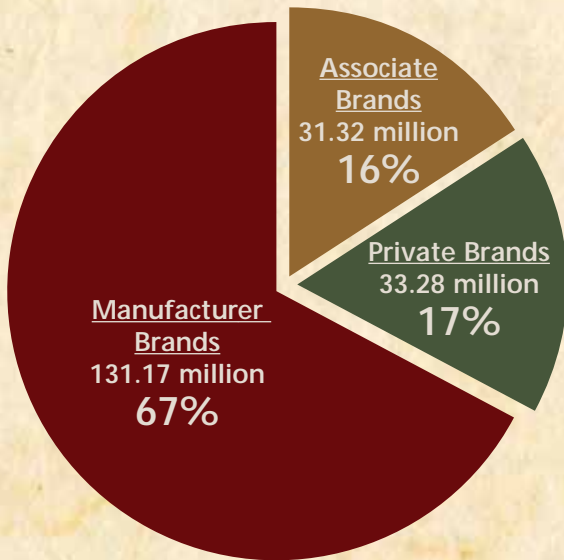
(Source: RMA)



# MARKET PROFILE

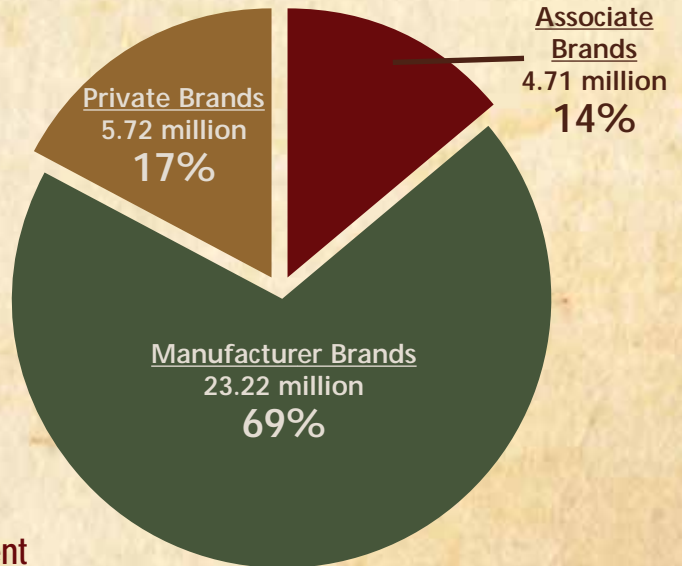
## 2006 U.S. Brand-Type Shares

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

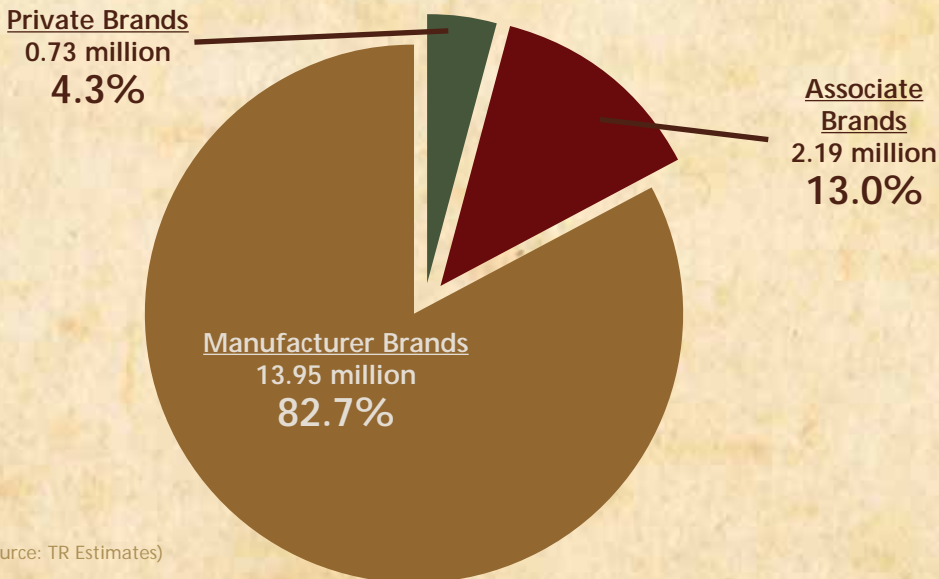


(Source: RMA)

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



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



(Source: TR Estimates)



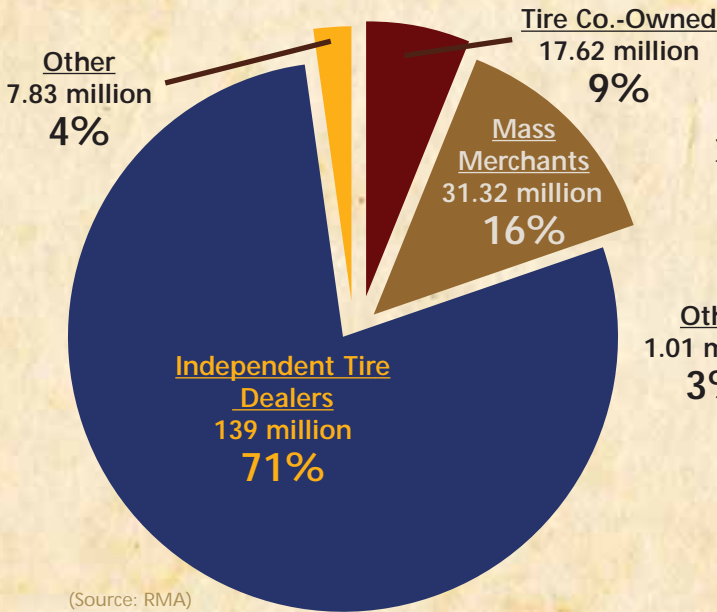


# MARKET PROFILE

## 2006 U.S. Distribution Channel Shares

### P-Metric

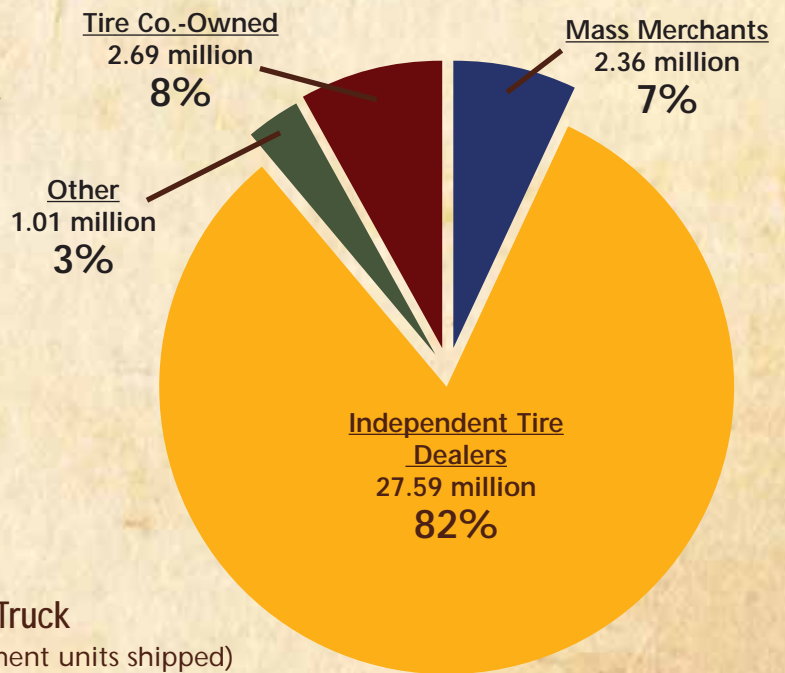
(195.77 million replacement units shipped)



(Source: RMA)

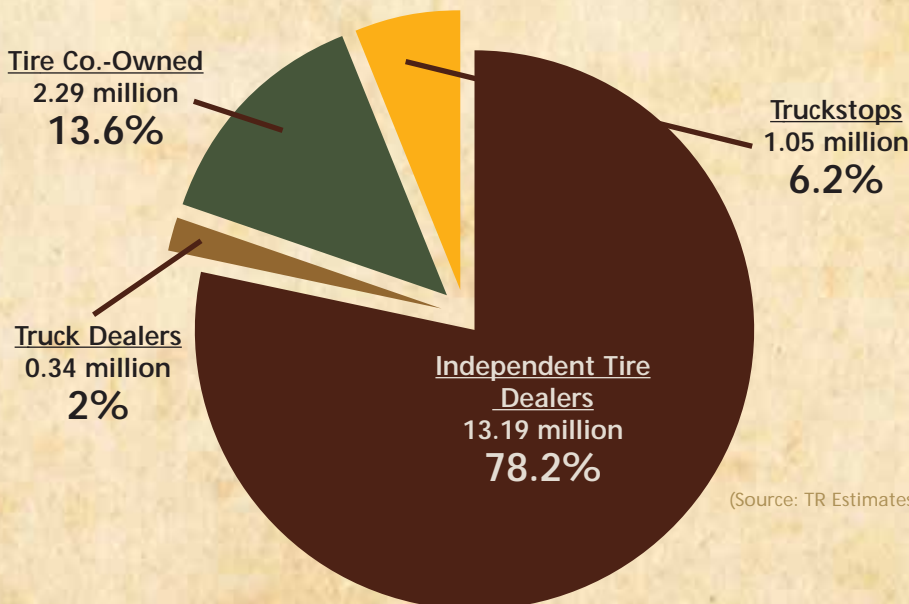
### LT-Metric

(33.65 million replacement units shipped)



### Medium Truck

(16.87 million replacement units shipped)



(Source: TR Estimates)



# MARKET PROFILE

## 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	16.47	11.60

(Source: Rubber Association of Canada)

## 2006

# Canada Tire Shipments

## 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

(Source: Rubber Association of Canada)

## Winter (millions of units)

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

(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

(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

(Source: Rubber Association of Canada)

## 2006 Top Replacement Tire Sizes – Canada

### P-Metric Tires

Rank	Size	Share
1	P215/70R15	6.4%
2	P185/65R14	6.0%
3	P195/65R15	5.6%
4	P225/60R16	5.5%
5	P205/70R15	4.5%
6	P205/65R15	3.6%
7	P195/70R14	3.6%
8	P175/65R14	3.1%
9	P215/65R16	2.8%
10	P185/70R14	2.7%

### Performance Tires

Rank	Size	Share
1	205/55R16	7.9%
2	P225/60R16	4.3%
3	P205/55R16	4.0%
4	195/65R15	3.7%
5	P195/60R15	3.1%
6	195/60R15	2.5%
7	205/50R16	2.3%
8	225/45R17	2.2%
9	P215/60R16	2.2%
10	P205/60R16	2.1%

### Winter Tires

Rank	Size	Share
1	195/65R15	5.7%
2	205/55R16	4.1%
3	P195/65R15	3.7%
4	P185/65R14	3.4%
5	215/65R16	2.8%
6	185/65R14	2.8%
7	185/65R15	2.6%
8	P215/70R15	2.6%
9	P175/65R14	2.6%
10	P195/60R15	2.5%

(Source: Rubber Association of Canada)

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

Rank	Size	Share
1	LT245/75R16	11.3%
2	LT265/75R16	7.9%
3	LT235/85R16	6.1%
4	P235/75R15	5.5%
5	LT225/75R16	5.0%
6	LT265/70R17	3.9%
7	LT235/75R15	2.9%
8	P265/70R17	2.4%
9	P235/70R16	2.4%
10	LT285/75R16	2.0%



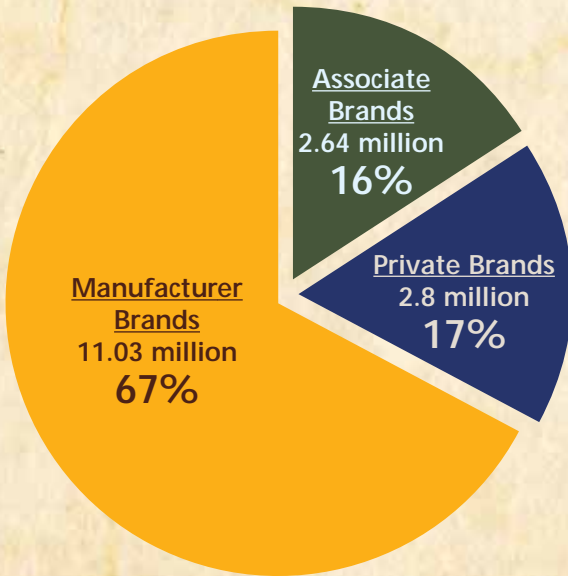


# MARKET PROFILE

## 2006 Canada Brand-Type Shares

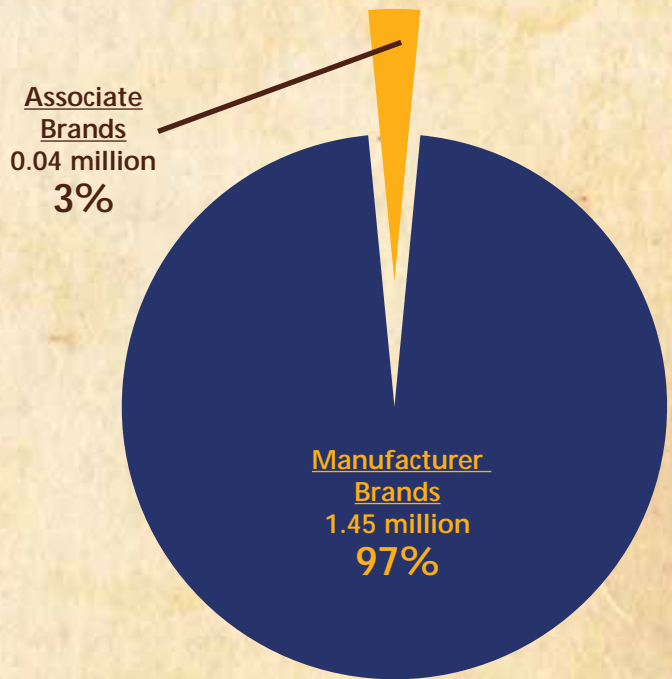
### P-Metric

(Replacement – 16.47 million units shipped)



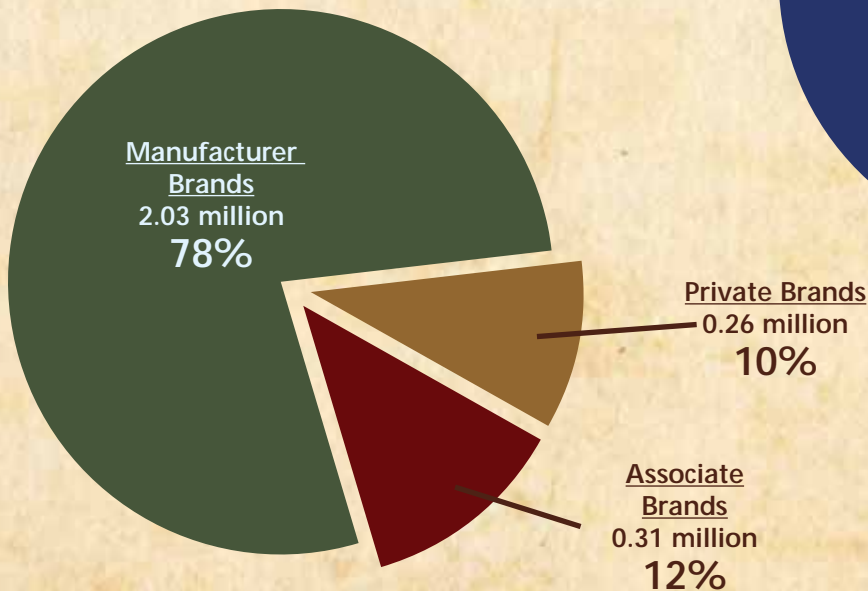
### Medium Truck

(Replacement – 1.49 million units shipped)



### LT-Metric

(Replacement – 2.6 million units shipped)



(Source: Rubber Association of Canada)



# MARKET PROFILE

## Speed-Rated Tire Breakdown

### OE Market

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

Year	<u>H-Rated</u>	<u>V-Rated</u>	<u>Z-Rated</u>	<u>Other Speed Rated</u>
<b>Total OE</b>				
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
2005.....	7.60%	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%
(48.18) .....	4.40	5.81	1.61	33.87

(Source: RMA)

### Replacement Market

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

Year	<u>H-Rated</u>	<u>V-Rated</u>	<u>Z-Rated</u>	<u>Other Speed Rated</u>
<b>Total Replace.</b>				
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%
(195.77) .....	30.03	9.41	9.54	112.88

(Source: RMA)





# MARKET PROFILE

## Vehicle Registrations 2001-06

### U.S. Registrations (millions of vehicles)

Year	Cars	LT/SUVs	Class		Total Vehicles
			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

(Source: AAIA)

### Canada Registrations (millions of vehicles)

Year	Cars	LT/SUVs	Class		Total Vehicles
			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

(Source: Statistics Canada, TR Estimates)

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Circle 26 for Reader Service





# MARKET PROFILE

## Vehicle Sales 2001-06

### 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	5.46	2.32	7.78	7.57	1.15	8.72	0.201	0.37	0.57	17.07

(Source: AAI/A)

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# MARKET PROFILE

## 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
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	2,795	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	2,890	12,325	11,287	13,295	73,445
2004	1,682	985	81	147	2,962	12,497	11,044	13,164	72,325
2005	1,701	972	82	149	2,990	12,503	10,987	13,003	72,287
2006	1,724	1,039	84	150	2,997	12,540	10,990	13,091	72,401

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

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Will You Be Ready?**

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