market profile

There's no doubt that 2009 was a frustratingly horrible year for everyone in transportation-related industries. For every business – from carmakers and their dealers to parts stores and tire retailers to mining and farming – the downturn meant decreased production, reduced sales and, in some cases, lost marketshare.

Huge cost pressures and reduced consumer spending on new tires and (to a lesser degree) service work made 2009 another tough year to be a tire dealer. And while independent tire dealers remain the North American market leaders in distribution, threats continue to rise from other channels.

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: dealer channel tire brand marketshares; 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 levels; brand and channel segmentation; new vehicle sales and vehicle registrations; as well as miles driven by vehicle type.

This data can help you navigate the fast-changing and vastly global industry.

Brand Marketshares – Dealer Channel

P-Metric Tires

2009 RMA Replacement Shipments: 189.52 million
Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	12.85%	Dayton	2.50%	Falken	1.15%
Michelin	8.75%	Kumho	2.45%	Sumitomo	1.00%
Firestone	8.60%	Yokohama	2.20%	Sigma	0.90%
Bridgestone	7.20%	Kelly	2.10%	Big O	0.85%
BFGoodrich	4.75%	Dunlop	1.90%	Nitto	0.75%
Cooper	4.65%	Hercules	1.85%	American Radial	0.70%
General	3.35%	Mastercraft	1.85%	National	0.70%
Hankook	2.70%	Cordovan	1.65%	Regul	0.70%
Toyo	2.70%	Delta	1.50%	Dean	0.65%
Multi-Mile	2.65%	Pirelli	1.25%	Fuzion	0.50%
Uniroyal	2.60%	Continental	1.20%	**Others**	**10.85%**

LT-Metric

2009 RMA Replacement Shipments: 27.48 million
Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	10.25%	Mastercraft	2.85%	Pirelli	1.20%
BFGoodrich	8.80%	Yokohama	2.60%	Hercules	1.05%
Bridgestone	7.20%	Cordovan	2.35%	National	1.05%
Michelin	7.10%	Uniroyal	2.35%	Laramie	0.85%
Firestone	6.80%	Delta	2.00%	Big O	0.85%
Cooper	6.60%	Dunlop	1.85%	Eldorado	0.80%
Multi-Mile	5.45%	Continental	1.75%	Mickey Thompson	0.60%
General	5.05%	Dayton	1.75%	Falken	0.50%
Kelly	3.25%	Kumho	1.70%	Maxxis	0.45%
Toyo	3.25%	Hankook	1.35%	**Others**	**8.35%**

Brand Marketshares – Dealer Channel

Performance (H-Rated & Above)

2009 RMA Replacement Shipments: 50.3 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Goodyear	15.15%
Michelin	12.90%
Bridgestone	8.85%
Yokohama	7.45%
Toyo	7.15%
BFGoodrich	6.50%
Firestone	5.30%
Dunlop	4.85%
Kumho	4.50%
Falken	4.00%
Pirelli	3.15%
Hankook	2.70%
Cooper	2.45%
General	2.30%
Continental	2.20%
Sumitomo	1.65%
Uniroyal	1.35%
Kelly	1.30%
Multi-Mile	1.10%
Nitto	1.00%
Dayton	0.85%
Wanli	0.80%
Nexen	0.75%
Big O	0.55%
Others	**1.20%**

Medium Truck

2009 RMA Replacement Shipments: 12.88 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share
Goodyear	19.10%	Cooper/Roadmaster	2.20%
Bridgestone	17.90%	Continental	2.20%
Michelin	16.90%	Kumho	2.15%
Firestone	6.90%	Hercules	1.65%
Yokohama	5.05%	Power King	1.60%
Toyo	4.85%	Sumitomo	1.55%
General	4.55%	Double Coin	1.35%
Hankook	2.75%	BFGoodrich	1.20%
Dunlop	2.35%	DynaTrak	1.00%
Kelly	2.25%	Gladiator	0.80%
		Others	**1.70%**

Agricultural

2009 Industry Replacement Shipments: 1.93 million

Shares Rounded to Nearest 0.05%

Rear Tire Segment

Brand	Bias Share	Radial Share
Firestone	43.25%	35.80%
Goodyear	16.50%	31.00%
Titan	18.60%	10.10%
Universal Co-Op	5.00%	6.15%
Michelin	--	9.60%
Harvest King	3.75%	--
BKT	5.45%	5.50%
Akuret	3.05%	--
Alliance	1.95%	1.50%
Denman	0.40%	--
Trelleborg	1.40%	1.50%
Others	**1.05%**	**7.85%**

(Source: TR Estimates)

OTR

2009 Industry Replacement Shipments: 116.8 thousand

Shares Rounded to Nearest 0.05%

Brand	Bias Share	Radial Share
Bridgestone	9.45%	37.85%
Firestone	26.70%	--
Michelin	--	27.60%
Goodyear	28.25%	24.60%
General	18.00%	--
Titan	8.10%	0.10%
Continental	--	3.70%
Others	**9.5%**	**6.15%**

Front/Implement Segment

Brand	Dealer Share
Firestone	38.40%
Titan	16.80%
Goodyear	17.70%
Universal Co-Op	5.50%
American Farmer	5.15%
Harvest King	4.25%
BKT	3.00%
Trelleborg	2.00%
Alliance	1.00%
Denman	0.75%
Carlisle	0.50%
Others	**5.70%**

market profile

2009 U.S. Tire Shipments

P-Metric
(millions of units)

Year	Replacement	OE
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
2008	195.10	37.60
2009	189.52	24.60

(Source: RMA)

Winter
(millions of units)

Year	Replacement	OE
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
2008	9.50	1.00
2009	8.80	0.70

(Source: RMA)

LT-Metric
(millions of units)

Year	Replacement	OE
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
2008	29.40	2.90
2009	27.48	2.79

(Source: RMA)

Medium Truck
(millions of units)

Year	Replacement	OE	Retreads
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
2008	14.80	3.80	14.70
2009	12.88	2.42	13.85

(Source: RMA & TR Estimates)

OTR
(thousands of units)

	Replacement		OE	
Year	Bias	Radial	Bias	Radial
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
2008	62.57	74.86	26.54	57.36
2009	53.18	63.63	22.82	49.33

Ag/Forestry
(millions of units)

	Replacement		OE	
Year	F	R	F	R
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
2008	1.4	0.77	0.36	0.66
2009	1.3	0.63	0.38	0.55

2009 Top Tire Sizes – U.S.

Replacement P-Metric

Rank	Size	Share
1	P225/60R16	4.1%
2	P235/75R15	3.7%
3	P215/60R16	2.5%
4	P205/65R15	2.4%
5	P265/70R17	2.4%
6	P195/65R15	2.0%
7	P215/70R15	2.0%
8	P205/55R16	1.9%
9	P235/70R16	1.8%
10	215/65R16	1.8%

OE P-Metric

Rank	Size	Share
1	P215/60R16	9.0%
2	P265/70R17	5.5%
3	P235/70R16	4.5%
4	P215/55R17	4.2%
5	P225/50R17	3.4%
6	P205/55R16	3.4%
7	P245/65R17	3.1%
8	P275/55R20	3.0%
9	P195/60R15	2.9%
10	P275/65R18	2.3%

Replacement LT-Metric

Rank	Size	Share
1	LT245/75R16	16.0%
2	LT265/75R16	14.7%
3	LT235/85R16	9.4%
4	LT225/75R16	7.9%
5	LT265/70R17	7.5%
6	31x10.50R15	5.4%
7	LT285/75R16	5.2%
8	LT215/85R16	3.9%
9	LT235/75R15	2.9%
10	LT285/70R17	2.5%

OE LT-Metric

Rank	Size	Share
1	LT245/75R16	23.4%
2	LT245/75R17	13.8%
3	LT225/75R16	11.6%
4	LT265/70R17	10.5%
5	LT275/70R18	9.2%
6	LT275/65R18	6.8%
7	37x12.50R16.5	4.8%
8	LT275/65R20	4.3%
9	LT225/75R17	3.5%
10	LT265/75R16	2.8%

Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	26.7%
2	11R22.5	22.9%
3	11R24.5	11.5%
4	285/75R24.5	7.0%
5	225/70R19.5	6.3%

OE Medium Truck

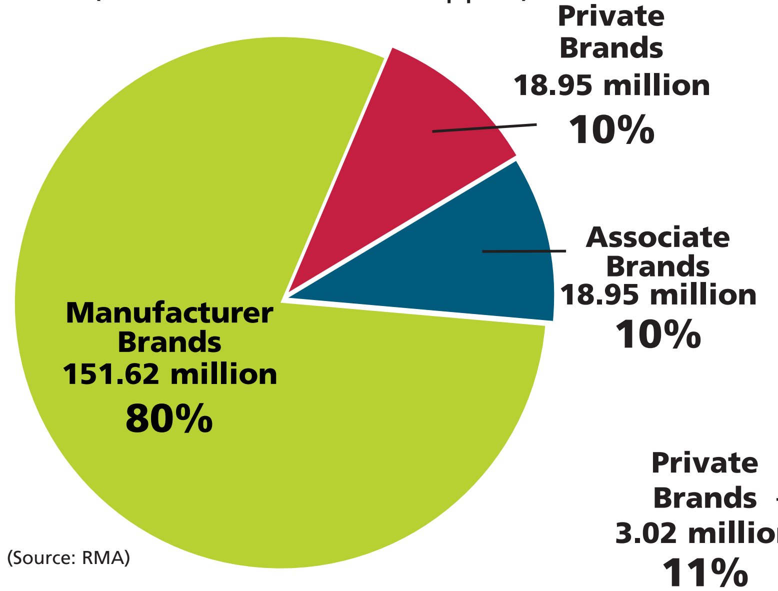
Rank	Size	Share
1	295/75R22.5	30.0%
2	11R22.5	28.4%
3	11R24.5	7.6%
4	225/70R19.5	6.4%
5	315/80R22.5	3.9%

(Source: RMA)

2009 U.S. Brand-Type Shares

P-Metric Replacement

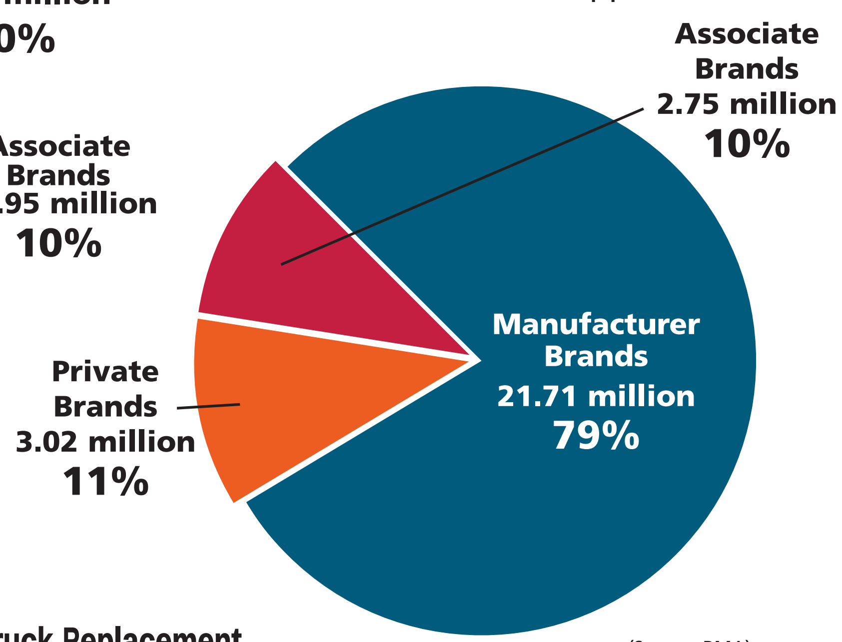
(189.52 million units shipped)



(Source: RMA)

LT-Metric Replacement

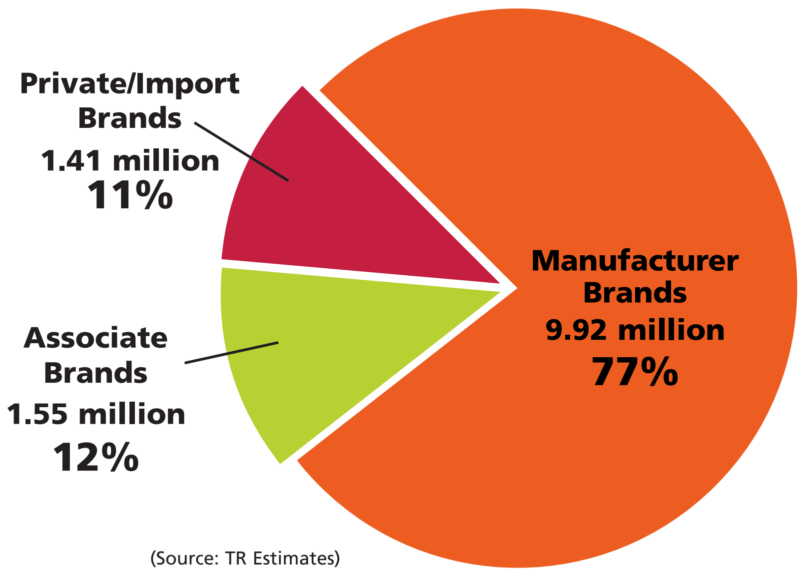
(27.48 million units shipped)



(Source: RMA)

Medium Truck Replacement

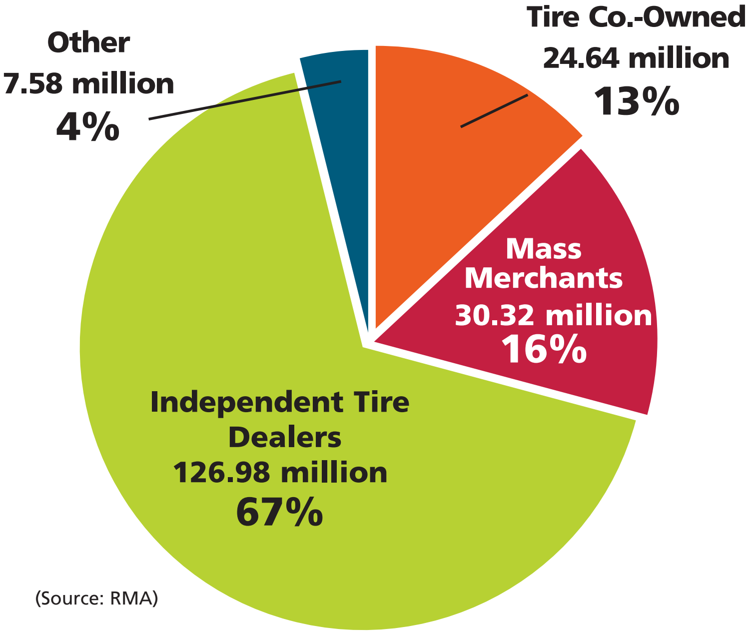
(12.88 million units shipped)



(Source: TR Estimates)

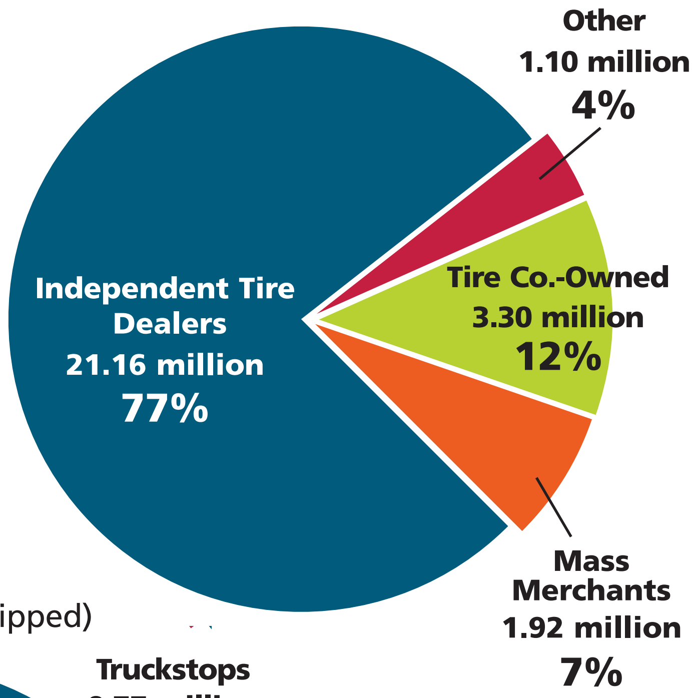
2009 U.S. Distribution Channel Shares

P-Metric
(189.52 million units shipped)



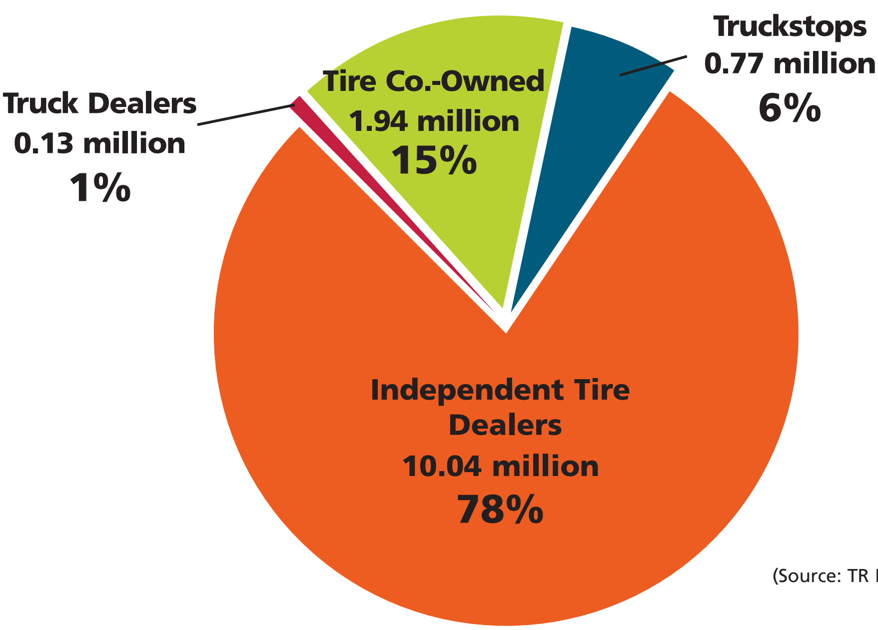
(Source: RMA)

LT-Metric
(27.48 million units shipped)



(Source: RMA)

Medium Truck
(12.88 million units shipped)



(Source: TR Estimates)

2009 Canada Tire Shipments

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
2008	20.93	7.65
2009	19.22	6.00

(Source: Rubber Association of Canada and TR Estimates)

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
2008	3.30	0.54
2009	2.67	0.10

(Source: Rubber Association of Canada and TR Estimates)

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
2008	7.15
2009	6.31

(Source: Rubber Association of Canada and TR Estimates)

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
2008	2.85
2009	1.72

(Source: Rubber Association of Canada and TR Estimates)

Medium Truck
(millions of units)

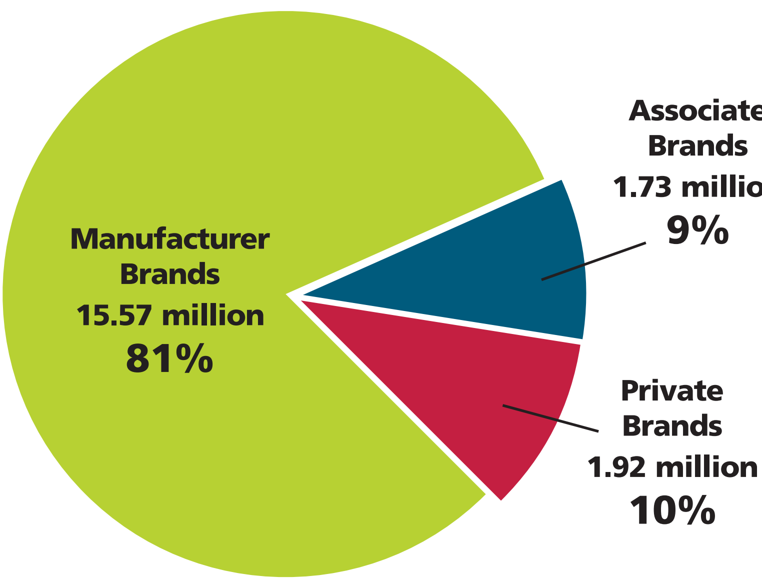
Year	Replacement	OE
2001	1.34	0.43
2002	1.48	0.48
2003	1.39	0.42
2004	1.52	0.56
2005	1.48	0.54
2006	1.49	0.48
2007	1.36	0.38
2008	1.38	0.29
2009	1.21	0.13

(Source: Rubber Association of Canada and TR Estimates)

2009 Canada Brand-Type Shares

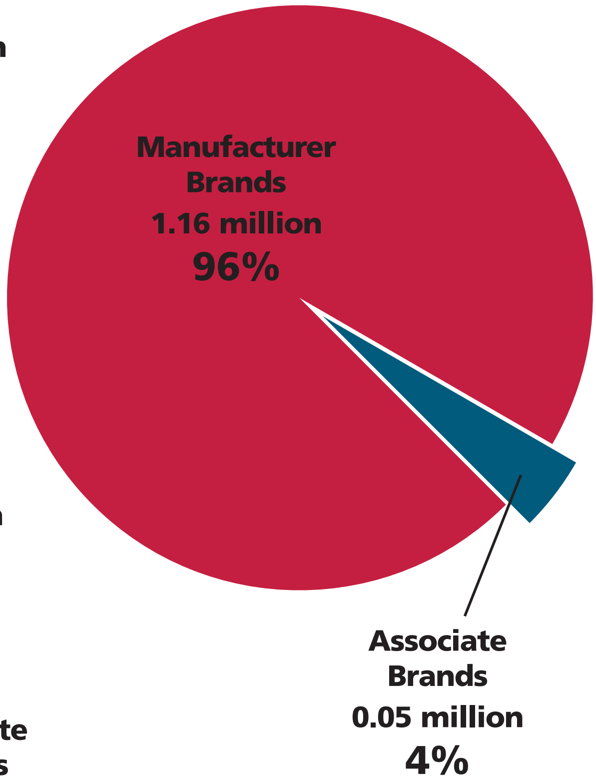
P-Metric

(Replacement – 19.22 million units shipped)



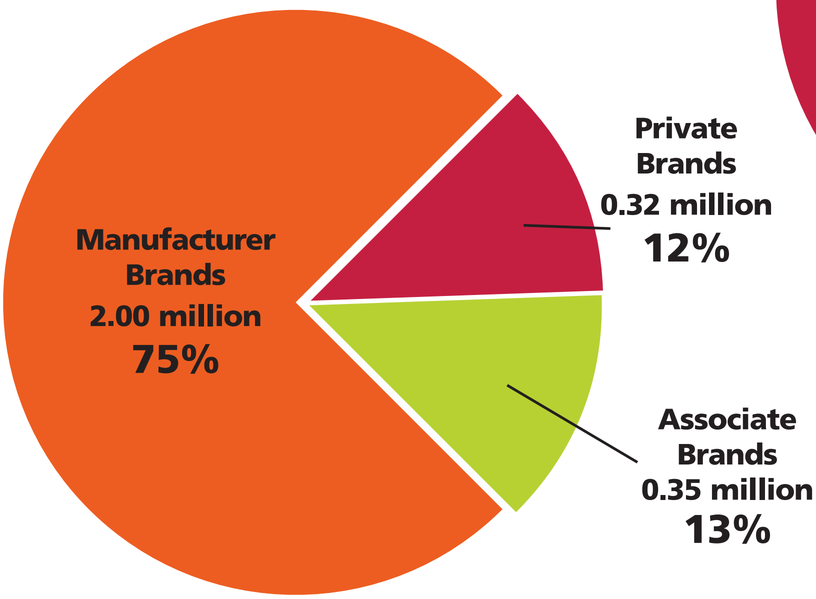
Medium Truck

(Replacement – 1.21 million units shipped)



LT-Metric

(Replacement – 2.67 million units shipped)



(Source: TR Estimates)

Speed-Rated Tire Breakdown

OE Market
(% of total 2009 U.S. shipments/millions of units)

Year / Total OE	H-Rated	V-Rated	Z-Rated	Other Speed Rated
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
2008	14.4%	15.2%	3.8%	66.6%
(36.2)	5.2	5.5	1.4	24.1
2009	15.7%	15.7%	2.6%	66.0%
(23.5)	3.7	3.7	0.6	15.5

(Source: RMA)

Replacement Market
(% of total 2009 U.S. shipments/millions of units)

Year / Total Replacement	H-Rated	V-Rated	Z-Rated	Other Speed Rated
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
2008	19.1%	6.9%	6.7%	67.3%
(155.7)	29.7	10.7	10.4	104.9
2009	18.4%	7.4%	6.9%	67.3%
(153.7)	28.3	11.4	10.6	103.4

(Source: RMA)

Vehicle Registrations, Sales & Mileage

U.S. Registrations
(millions of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
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
2008	135.52	106.56	3.42	5.30	250.80
2009	133.05	108.46	3.42	5.20	250.13

(Source: AAIA)

Canada Registrations
(millions of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
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
2008	11.55	6.92	0.24	0.53	19.24
2009	12.33	8.24	0.26	0.60	21.43

(Source: Statistics Canada, TR Estimates)

U.S. Vehicle Sales
(millions of units)

	Cars			LT/SUVs			Trucks			
Year	Domestic	Import	Total	Domestic	Import	Total	Class 4-6	Class 7-8	Total	Total Vehicles
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	0.170	0.22	0.39	16.55
2008	4.68	2.37	7.05	5.19	1.01	6.20	0.141	0.18	0.32	13.57
2009	3.77	1.92	5.69	3.95	0.79	4.74	0.094	0.13	0.22	10.66

(Source: AAIA)

Travel In Millions of Vehicle Miles
(all roads and streets)

Year	Miles
2000	2,715,524
2001	2,759,690
2002	2,816,593
2003	2,856,746
2004	2,929,041
2005	2,973,842
2006	3,002,656
2007	3,029,791
2008	2,925,728
2009	2,932,374

(Source: US Dept. of Transportation)

Average Age of Cars & Light Trucks

Year	Passenger Cars	Light Trucks	All Light Vehicles
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
2008	10.6	9.3	10.0
2009	10.6	9.6	10.2

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

U.S. Vehicle Sales by Type

U.S. Top 10 Passenger Car Sales

Brand	2008	2009	% Change 08/09
Toyota Camry	436,617	356,824	-18.3%
Toyota Corolla	351,007	296,874	-15.4%
Honda Accord	372,789	290,056	-22.2%
Honda Civic	339,289	259,722	-23.5%
Nissan Altima	269,668	203,568	-24.5%
Ford Fusion	147,569	180,671	22.4%
Chevrolet Impala	265,840	165,565	-37.7%
Chevrolet Malibu	178,253	161,568	-9.4%
Ford Focus	195,823	160,433	-18.1%
Toyota Prius	158,884	139,682	-12.1%
Top 10 Passenger Car Sales Total	**2,715,739**	**2,214,963**	**-18.4%**
Total U.S. Passenger Car Sales	**7,042,140**	**5,692,432**	**-19.2%**
Top 10 as a % of Total Passenger Cars	**38.6%**	**38.9%**	

U.S. Top 10 Light Truck/SUV Sales

Brand	2008	2009	% Change 08/09
Ford F-Series	515,513	413,625	-19.8%
Chevrolet Silverado	465,065	316,544	-31.9%
Honda CR-V	197,279	191,214	-3.1%
Dodge Ram Pickup	245,840	177,268	-27.9%
Ford Escape	156,544	173,044	10.5%
Toyota RAV4	137,020	149,088	8.8%
Toyota Sierra	168,544	111,842	-33.6%
Toyota Tacoma	144,655	111,824	-22.7%
Honda Odyssey	135,493	100,133	-26.1%
Chevrolet Traverse	9,456	91,074	863.1%
Top 10 Light Truck Sales Total	**2,175,409**	**1,835,656**	**-15.6%**
Total U.S. Light Truck Sales	**6,203,578**	**4,739,077**	**-23.6%**
Top 10 as a % of Total Light Trucks	**35.1%**	**38.7%**	

(Source: AAIA)

market profile

Canada Vehicle Sales by Type

Canada Top 10 Passenger Car Sales

Brand	2008	2009	% Change 08/09
Honda Civic	72,463	62,654	-13.5%
Toyota Corolla	57,736	53,933	-6.6%
Mazda Mazda3	50,317	46,943	-6.7%
Hyundai Elantra	11,814	30,675	159.6%
Hyundai Accent	29,751	25,220	-15.2%
Toyota Yaris	40,602	23,773	-41.4%
Toyota Matrix	23,549	22,526	-4.3%
Ford Focus	23,654	21,831	-7.7%
Nissan Versa	21,845	20,097	-8.0%
Ford Fusion	13,326	16,526	24.0%
Top 10 Passenger Car Sales Total	**345,057**	**324,178**	**-6.1%**
Total Canadian Passenger Car Sales	**889,660**	**759,110**	**-14.7%**
Top 10 as a % of Total Passenger Cars	**38.8%**	**42.7%**	

Canada Top 10 Light Truck/SUV Sales

Brand	2008	2009	% Change 08/09
Ford F-Series	67,749	81,396	20.1%
Dodge Caravan/Grand Caravan	39,780	40,283	1.3%
GMC Sierra	34,555	37,316	8.0%
Ford Escape	32,898	36,980	12.4%
Chevrolet Silverado	34,685	36,428	5.0%
Dodge Ram Pickup	42,736	31,408	-26.5%
Toyota RAV4	20,522	25,784	25.6%
Hyundai Sante Fe	14,401	24,676	71.3%
Ford Ranger	24,211	20,715	-14.4%
Honda CR-V	20,500	18,554	-9.5%
Top 10 Light Truck Sales Total	**332,037**	**353,540**	**6.5%**
Total Canadian Light Truck Sales	**750,360**	**702,565**	**-6.4%**
Top 10 as a % of Total Light Truck Sales	**44.3%**	**50.3%**	

(Source: AAIA)