TIRE MARKET PROFILE

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The ever-shifting tire landscape makes it difficult to pin down an accurate picture of the industry overall. 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, this section will help you gain a better perspective of our industry, help you see emerging trends, and better prepare your business for what lies ahead.

Through painstaking research, we've been able to assemble this collection of data, which includes: the top 25 global tiremakers; 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.

Added to this is our annual survey of hundreds of independent tire dealers throughout North America, who offered their insights on the structure and size of today's tire dealer, as well as a look at tire pricing levels, buying patterns, average gross margins, and much more.

Top 25 Global Tire Manufacturers – 2010

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

Company	Country	2010 Sales
Bridgestone Corp.	Japan	$34,900
Continental AG	Germany	$34,500
Groupe Michelin	France	$23,500
Goodyear Tire & Rubber Co.	U.S.	$18,800
Sumitomo Rubber Industries Ltd.	Japan	$7,400
Pirelli & C SpA	Italy	$6,400
Yokohama Rubber Corp.	Japan	$6,200
Hankook Tire Co.	South Korea	$5,100
Toyo Tire & Rubber Co.	Japan	$3,500
Cooper Tire & Rubber Co.	U.S.	$3,300
Triangle Group Co.	China	$3,300
Cheng Shin Rubber/Maxxis	Taiwan	$2,900
Hangzhou Zhongce Rubber Co.	China	$2,500
Kumho Tire Co.	South Korea	$2,400
Shandong Linglong Rubber Co.	China	$2,200
Apollo Tyres Ltd.	India	$1,900
MRF Ltd.	India	$1,800
JK Tyre & Industries	India	$1,300
Double Coin Holdings Ltd.	China	$1,100
Xingyuan Tyre Co.	China	$1,000
Nokian Tyres plc	Finland	$990
Nexen Tire Corp.	South Korea	$950
Qingdao Doublestar Industrial Co.	China	$900
Chengshan Group Co.	China	$705
Giti Tire (China) Investment Co.	China	$546

DEALER CHANNEL BRAND MARKETSHARE

P-Metric Tires

2010 RMA Replacement Shipments: 201.3 million

(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.90%	Multi-Mile	2.55%	Falken	1.25%
Michelin	8.75%	Kumho	2.40%	Nexen	1.15%
Firestone	8.55%	Continental	2.25%	Sumitomo	1.00%
Bridgestone	7.30%	Dunlop	2.20%	Nitto	0.95%
BFGoodrich	4.75%	Kelly	2.00%	Big O	0.85%
Cooper	4.70%	Mastercraft	1.90%	Sigma	0.80%
General	3.45%	Hercules	1.85%	Fuzion	0.75%
Hankook	2.75%	Dayton	1.75%	Regul	0.70%
Toyo	2.70%	Cordovan	1.65%	Dean	0.60%
Uniroyal	2.60%	Delta	1.50%	National	0.50%
Yokohama	2.65%	Pirelli	1.30%	**Others**	**8.00%**

LT-Metric

2010 RMA Replacement Shipments: 29.1 million

(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	11.35%	Continental	2.35%	Maxxis	0.85%
BFGoodrich	8.80%	Hankook	2.35%	Big O	0.75%
Bridgestone	7.20%	Uniroyal	2.35%	Dayton	0.75%
Michelin	7.20%	Cordovan	2.25%	Eldorado	0.75%
Firestone	6.90%	Kelly	2.20%	Nexen	0.75%
Cooper	6.60%	Kumho	1.90%	Laramie	0.65%
Multi-Mile	5.40%	Delta	1.85%	National	0.65%
General	5.15%	Dunlop	1.65%	Mickey Thompson	0.60%
Toyo	3.25%	Falken	1.35%	Sigma	0.55%
Mastercraft	2.85%	Pirelli	1.35%	**Others**	**5.55%**
Yokohama	2.80%	Hercules	1.05%		

Medium Truck

2010 RMA Replacement Shipments: 15.8 million

(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share
Bridgestone	17.90%	Toyo	2.75%
Goodyear	17.10%	Cooper/Roadmaster	2.00%
Michelin	16.90%	Kumho	1.95%
Firestone	6.90%	Hercules	1.70%
Yokohama	5.65%	Double Coin	1.60%
Kelly	3.85%	Sumitomo	1.55%
Continental	3.20%	DynaTrak	1.25%
General	3.00%	Gladiator	1.25%
Hankook	2.90%	BFGoodrich	1.10%
Dunlop	2.85%	**Others**	**4.60%**

(Source: TR Estimates)

DEALER CHANNEL BRAND MARKETSHARES

Performance (H-Rated & Above)

2010 RMA Replacement Shipments: 55.7 million

(Shares Rounded to Nearest 0.05%)

Brand	Dealer Share
Goodyear	14.20%
Michelin	12.80%
Bridgestone	8.90%
Yokohama	7.60%
Toyo	7.00%
BFGoodrich	6.55%
Firestone	5.20%
Kumho	4.30%
Falken	4.15%
Dunlop	3.70%
Pirelli	3.25%
Hankook	2.90%
Cooper	2.55%
Continental	2.50%
General	2.40%
Kelly	2.20%
Sumitomo	1.65%
Nexen	1.25%
Uniroyal	1.05%
Fuzion	1.00%
Multi-Mile	1.00%
Nitto	1.00%
Wanli	0.80%
Others	**1.95%**

Agricultural

2010 Industry Replacement Shipments: 2.12 million

(Shares Rounded to Nearest 0.05%)

Rear Tire Segment

Brand	Bias Share	Radial Share
Firestone	43.25%	35.70%
Goodyear	17.50%	31.00%
Titan	18.10%	9.95%
Universal Co-Op	3.00%	4.35%
Michelin	--	9.80%
Harvest King	3.35%	--
BKT	6.50%	6.75%
Akuret	1.95%	--
Alliance	2.15%	1.50%
Trelleborg	1.75%	1.75%
Others	**2.45%**	**0.80%**

Front/Implement Segment

Brand	Dealer Share
Firestone	38.40%
Titan	16.80%
Goodyear	18.65%
Universal Co-Op	5.50%
American Farmer	5.40%
Harvest King	3.70%
BKT	3.45%
Trelleborg	2.00%
Alliance	1.30%
Carlisle	0.50%
Others	**4.30%**

OTR

2010 Industry Replacement Shipments: 196.0 thousand

(Shares Rounded to Nearest 0.05%)

	Bias Share	Radial Share
Bridgestone	9.45%	37.80%
Firestone	26.10%	--
Michelin	--	27.60%
Goodyear	28.25%	23.60%
General	18.10%	--
Titan	8.10%	0.20%
Others	**10.0%**	**10.80%**

(Source: TR Estimates)

2010 U.S. TIRE SHIPMENTS

P-Metric (millions of units)

Year	Replacement	OE
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
2010	201.30	33.10

(Source: RMA)

Winter (millions of units)

Year	Replacement	OE
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
2010	8.70	1.10

(Source: RMA)

LT-Metric (millions of units)

Year	Replacement	OE
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
2010	29.10	3.60

(Source: RMA)

Medium Truck (millions of units)

Year	Replacement	OE	Retreads
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
2010	15.80	3.20	14.72

(Source: RMA & TR Estimates)

OTR (thousands of units)

	Replacement		OE	
Year	Bias	Radial	Bias	Radial
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
2010	84.51	111.49	29.67	64.13

Ag/Forestry (millions of units)

	Replacement		OE	
Year	F	R	F	R
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
2010	1.4	0.72	0.41	0.60

2010 TOP TIRE SIZES – U.S.

Replacement P-Metric

Rank	Size	Share
1	P225/60R16	3.6%
2	P235/75R15	3.4%
3	P215/60R16	2.5%
4	P265/70R17	2.3%
5	P205/65R15	2.2%
6	P205/55R16	2.2%
7	P195/65R15	2.0%
8	P215/70R15	1.8%
9	P235/70R16	1.8%
10	215/65R16	1.8%

OE P-Metric

Rank	Size	Share
1	P215/60R16	7.0%
2	P265/70R17	5.8%
3	P215/55R17	4.1%
4	P235/70R16	3.5%
5	P275/55R20	3.1%
6	P245/65R17	2.8%
7	P225/50R17	2.6%
8	P275/65R18	2.4%
9	P195/60R15	2.4%
10	P245/70R17	2.3%

Replacement LT-Metric

Rank	Size	Share
1	LT245/75R16	15.1%
2	LT265/75R16	14.4%
3	LT235/85R16	8.8%
4	LT265/70R17	8.4%
5	LT225/75R16	7.7%
6	LT285/75R16	5.5%
7	31x10.50R15	5.0%
8	LT215/85R16	3.9%
9	LT285/70R17	2.7%
10	LT245/75R17	2.6%

OE LT-Metric

Rank	Size	Share
1	LT245/75R16	19.5%
2	LT245/75R17	18.4%
3	LT225/75R16	11.7%
4	LT275/65R18	8.2%
5	LT265/70R17	7.9%
6	LT275/70R18	6.2%
7	LT265/70R18	4.5%
8	LT275/65R20	3.7%
9	LT255/75R17	3.5%
10	LT235/80R17	3.1%

Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	28.2%
2	11R22.5	22.3%
3	11R24.5	11.6%
4	285/75R24.5	6.9%
5	225/70R19.5	6.0%

OE Medium Truck

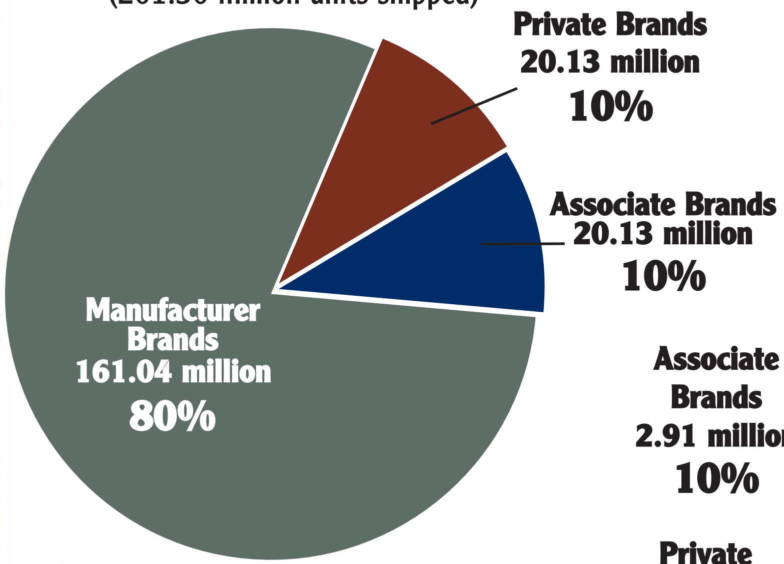
Rank	Size	Share
1	295/75R22.5	32.5%
2	11R22.5	28.3%
3	11R24.5	8.1%
4	225/70R19.5	6.4%
5	315/80R22.5	3.5%

(Source: RMA)

2010 U.S. BRAND-TYPE SHARES

P-Metric Replacement

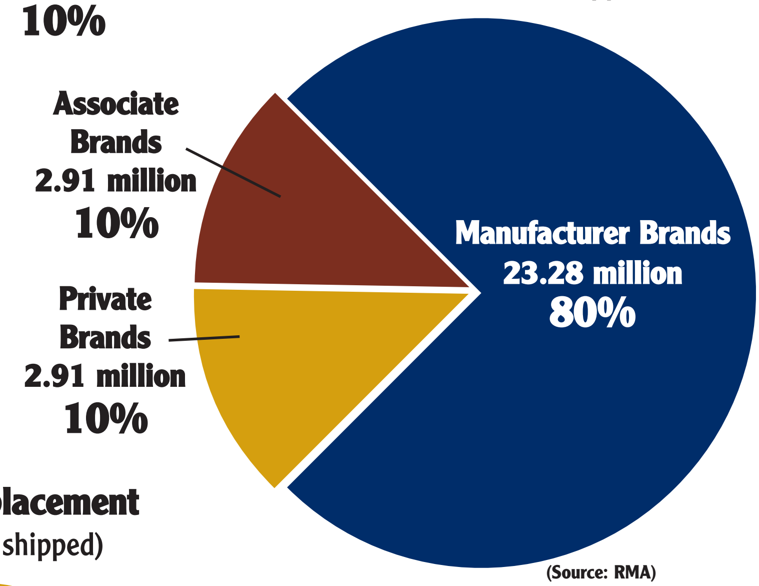
(201.30 million units shipped)



(Source: RMA)

LT-Metric Replacement

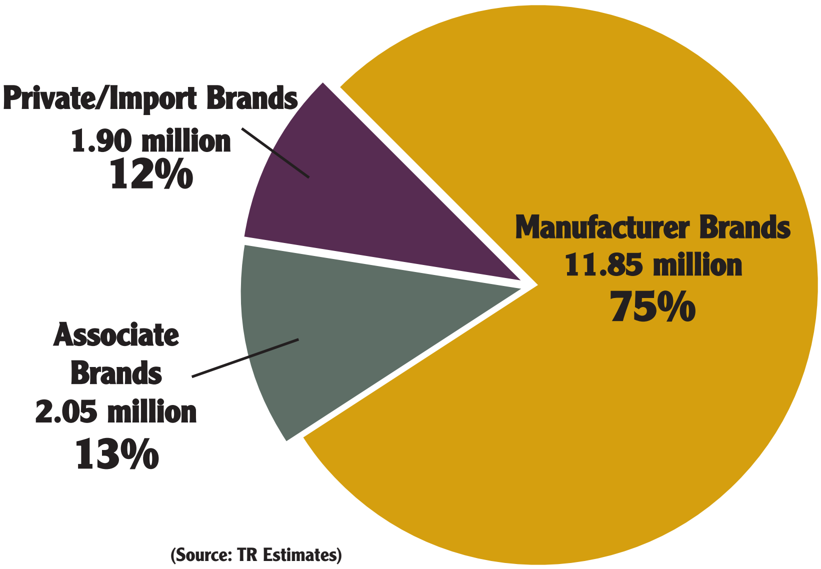
(29.10 million units shipped)



(Source: RMA)

Medium Truck Replacement

(15.80 million units shipped)

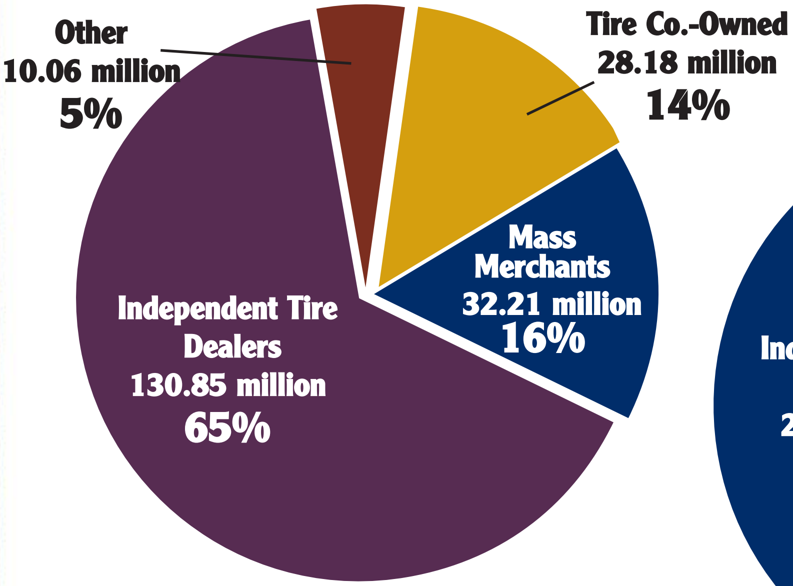


(Source: TR Estimates)

TIRE MARKET PROFILE

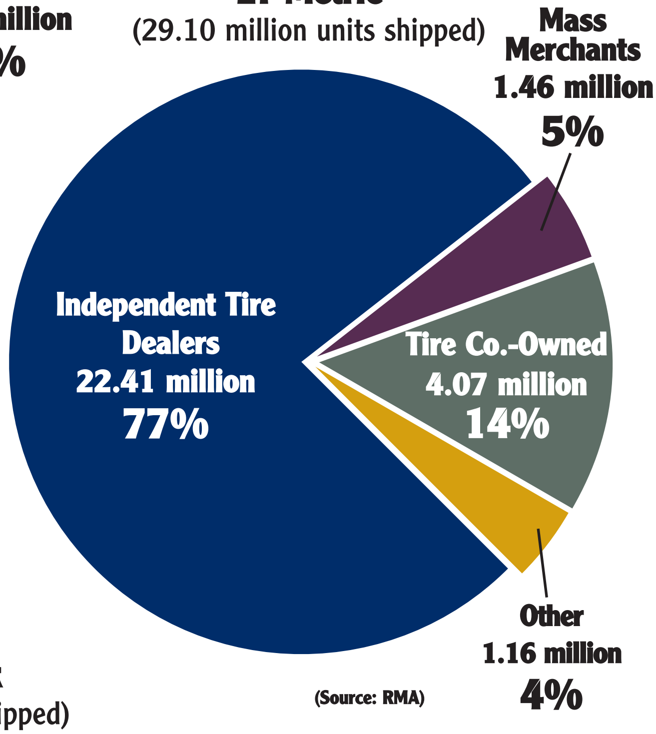
2010 U.S. DISTRIBUTION CHANNEL SHARES

P-Metric
(201.30 million units shipped)



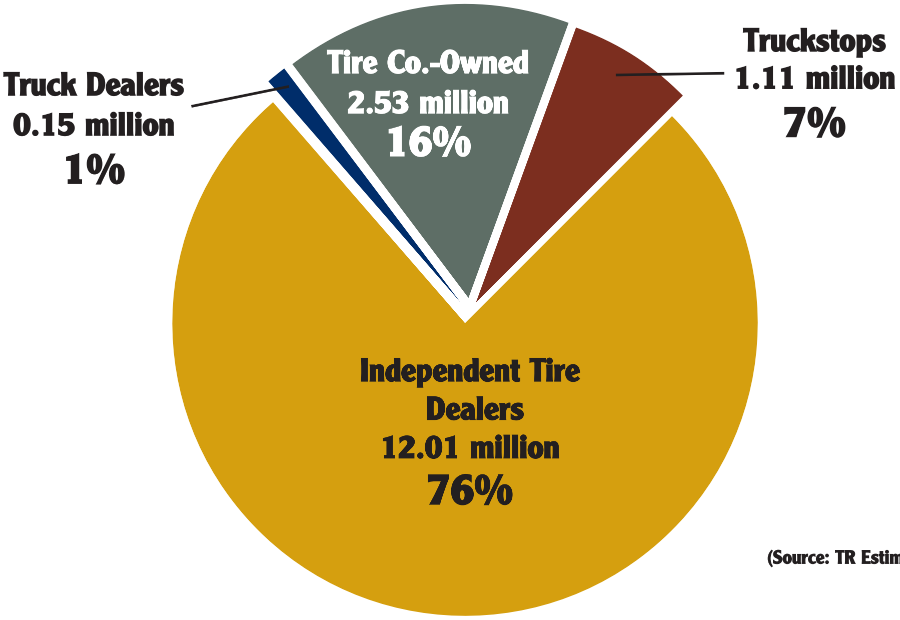
(Source: RMA)

LT-Metric
(29.10 million units shipped)



(Source: RMA)

Medium Truck
(15.80 million units shipped)



(Source: TR Estimates)

2010 CANADA TIRE SHIPMENTS

P-Metric
(millions of units)

Year	Replacement	OE
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
2010	16.12	7.91

LT-Metric
(millions of units)

Year	Replacement	OE
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	2.53	0.54
2009	2.76	0.10
2010	2.70	0.30

Winter
(millions of units)

Year	Replacement
2002	4.46
2003	4.43
2004	5.29
2005	5.97
2006	5.29
2007	5.44
2008	6.95
2009	7.55
2010	5.28

High Performance
(millions of units)

Year	Replacement
2002	1.10
2003	1.13
2004	1.40
2005	1.58
2006	1.51
2007	2.37
2008	2.55
2009	2.71
2010	3.11

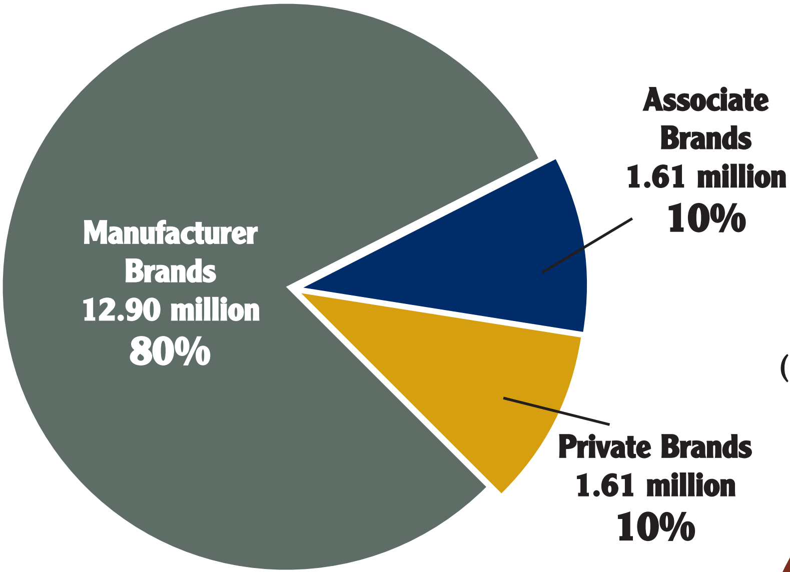
Medium Truck
(millions of units)

Year	Replacement	OE
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	1.27	0.29
2009	1.36	0.13
2010	1.40	0.15

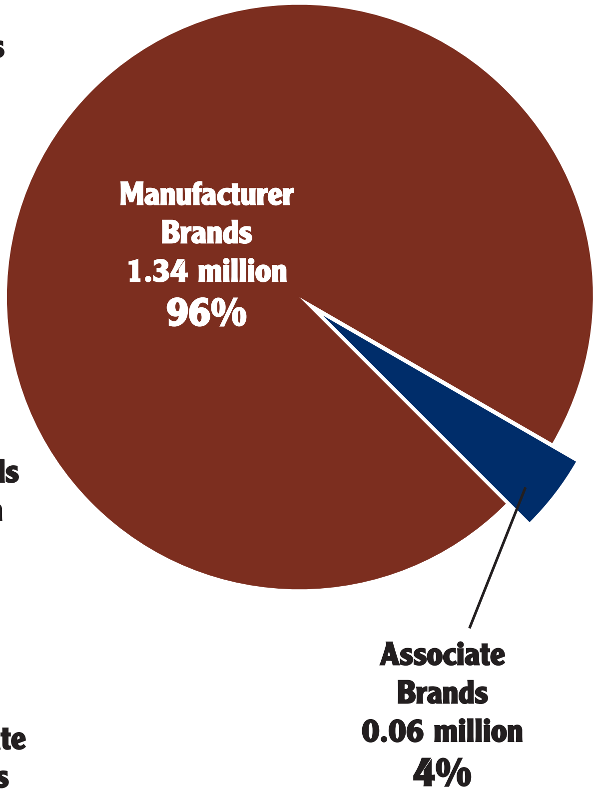
(Source: Rubber Association of Canada and TR Estimates)

2010 CANADA BRAND-TYPE SHARES

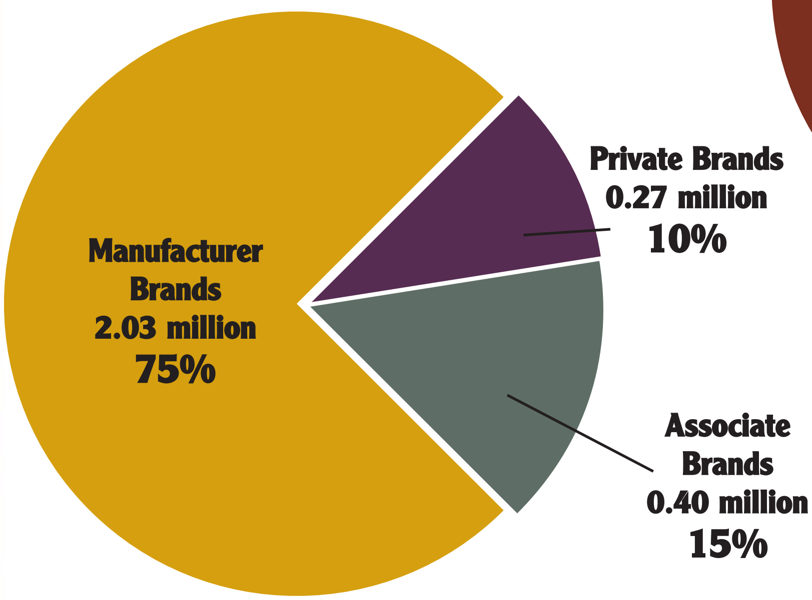
P-Metric
(Replacement – 16.12 million units shipped)



Medium Truck
(Replacement – 1.40 million units shipped)



LT-Metric
(Replacement – 2.70 million units shipped)



(Source: TR Estimates)

SPEED-RATED TIRE BREAKDOWN

OE Market
(% of total 2010 U.S. shipments/millions of units)

Year Total OE	H-Rated	V-Rated	Z-Rated	Other Speed Rated
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%
(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

(Source: RMA)

Replacement Market
(% of total 2010 U.S. shipments/millions of units)

Year Total Replacement	H-Rated	V-Rated	Z-Rated	Other Speed Rated
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%	57.5%
(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

(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
2003	131.07	87.30	2.87	7.47	225.84
2004	132.47	92.51	2.95	7.63	232.61
2005	133.91	98.08	3.08	7.98	239.97
2006	135.05	102.04	3.24	8.35	245.44
2007	135.22	105.69	3.35	8.58	249.49
2008	135.52	106.56	3.42	8.72	250.80
2009	133.05	108.46	3.42	8.61	250.13
2010	130.28	109.74	3.40	8.60	248.60

(Source: AAIA)

Canada Total Registrations
(millions of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
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
2010	13.07	8.73	0.28	0.63	22.71

(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
2003	3.40	4.20	7.60	6.60	2.40	9.00	0.14	0.23	0.37	12.00
2004	3.20	4.30	7.50	6.70	2.70	9.40	0.17	0.29	0.47	17.33
2005	3.10	4.40	7.50	6.40	2.80	9.20	0.19	0.35	0.54	17.30
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

(Source: AAIA)

U.S. 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	2,973,471
2009	2,979,175
2010	2,999,634

(Source: US Dept. of Transportation)

Average Age of Cars & Light Trucks

Year	Passenger Cars	Light Trucks	All Light Vehicles
2000	9.1	8.5	8.9
2001	9.3	8.4	8.9
2002	9.4	8.4	9.0
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	9.7
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

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

U.S. VEHICLE SALES BY TYPE

U.S. Top 10 Passenger Car Sales

Brand	2009	2010	% Change 09/10
Toyota Camry	352,541	328,242	-6.9%
Honda Accord	286,242	281,564	-1.6%
Toyota Corolla	294,665	269,774	-8.4%
Honda Civic	258,343	259,315	0.4%
Nissan Altima	202,902	224,465	10.6%
Ford Fusion	177,526	219,030	23.4%
Chevrolet Malibu	159,023	199,233	25.3%
Hyundai Sonata	117,180	196,999	68.1%
Chevrolet Impala	166,051	172,863	4.1%
Ford Focus	158,584	172,334	8.7%
Top 10 Passenger Car Sales	**2,173,057**	**2,323,819**	**6.9%**
Total U.S. Passenger Car Sales	**5,389,814**	**5,631,957**	**4.5%**
Top 10 as a % of Total Passenger Car Sales	**40.3%**	**41.3%**	

U.S. Top 10 Light Truck/SUV Sales

Brand	2009	2010	% Change 09/10
Ford F-Series	389,649	498,422	27.9%
Chevrolet Silverado	314,908	364,888	15.9%
Honda CR-V	190,254	202,880	6.6%
Ford Escape	170,618	192,700	12.9%
Dodge Ram Pickup	175,011	188,917	7.9%
Toyota RAV4	147,127	170,319	15.8%
GMC Sierra	111,721	127,560	14.2%
Honda Odyssey	99,753	107,577	7.8%
Toyota Tacoma	111,414	105,329	-5.5%
Dodge Caravan	88,021	102,514	16.5%
Top 10 Light Truck Sales	**1,798,476**	**2,061,106**	**14.6%**
Total U.S. Light Truck Sales	**4,956,657**	**5,822,019**	**17.5%**
Top 10 as a % of Total Light Trucks Sales	**36.3%**	**35.4%**	

(Source: AAIA)

CANADA VEHICLE SALES BY TYPE

Canada Top 10 Passenger Car Sales

Brand	**2009**	**2010**	**% Change 09/10**
Honda Civic	62,654	57,501	-8.2%
Mazda Mazda3	46,943	47,740	1.7%
Toyota Corolla	53,933	38,680	-28.3%
Hyundai Elantra	30,675	34,556	12.7%
Chevrolet Cobalt	14,350	25,957	80.9%
Hyundai Accent	25,220	24,017	-4.8%
Ford Focus	21,831	23,452	7.4%
Ford Fusion	16,526	19,364	17.2%
Toyota Matrix	22,526	19,093	-15.2%
Volkswagon Golf	12,725	15,951	25.4%
Top 10 Passenger Car Sales	**307,383**	**306,311**	**-0.3%**
Total Canadian Passenger Car Sales	**747,496**	**709,013**	**-5.1%**
Top 10 as a % of Total Passenger Car Sales	**41.1%**	**43.2%**	

Canada Top 10 Light Truck/SUV Sales

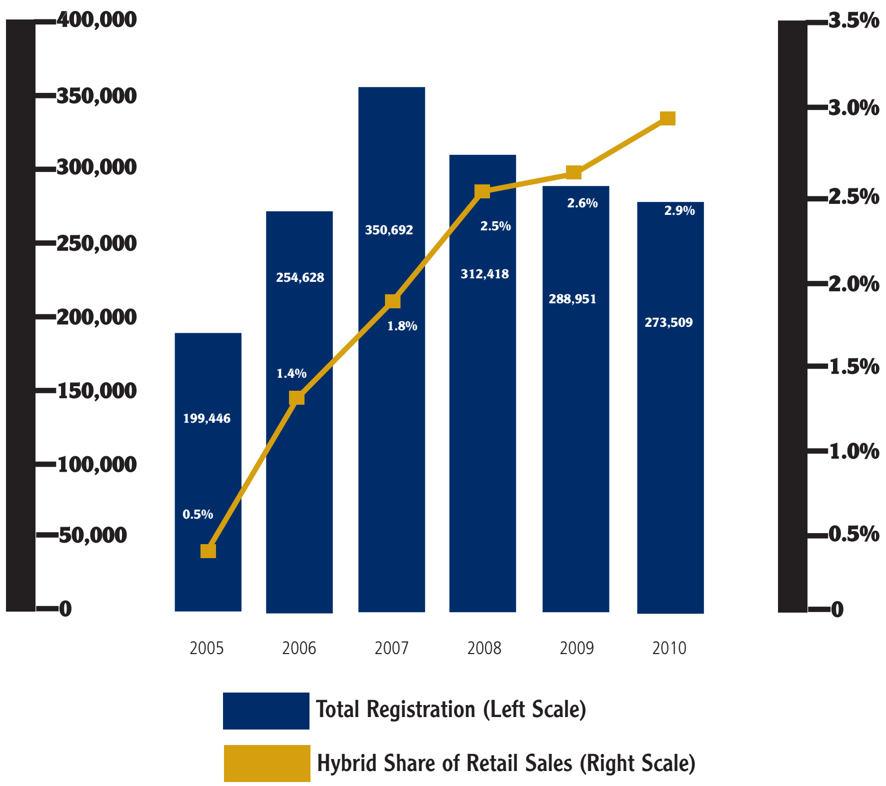
Brand	**2009**	**2010**	**% Change 09/10**
Ford F-Series	81,396	97,913	20.3%
Dodge Caravan/Grand Caravan	40,283	55,306	37.3%
Dodge Ram Pickup	31,408	53,386	70.0%
GMC Sierra	37,316	45,457	21.8%
Ford Escape	36,980	43,038	16.4%
Chevrolet Silverado	36,428	41,737	14.6%
Hyundai Sante Fe	24,676	27,882	13.0%
Honda CR-V	18,554	24,930	34.4%
Dodge Journey	15,390	23,785	54.5%
Toyota RAV4	25,784	22,810	-11.5%
Top 10 Light Truck Sales	**353,540**	**436,244**	**23.4%**
Total Canadian Light Truck Sales	**713,085**	**848,108**	**18.9%**
Top 10 as a % of Total Light Truck Sales	**49.6%**	**51.4%**	

(Source: AAIA)

TIRE MARKET PROFILE

2011 SOURCEBOOK

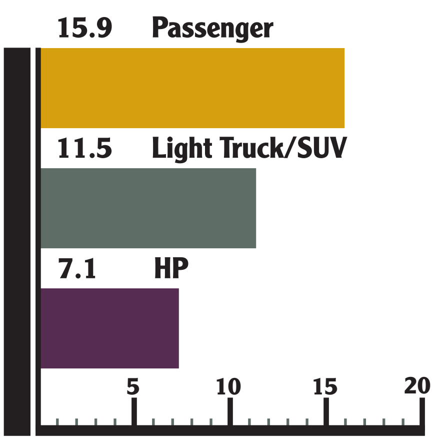
U.S. HYBRID VEHICLE REGISTRATION & RETAIL SHARE



(Source: AAIA)

WHAT RETAIL DEALERS SELL EACH DAY

(average tires sold per day 2010)



HOW DEALER INFLUENCES CONSUMER BUYING DECISION

31% Customers ask for a specific tire brand, and...

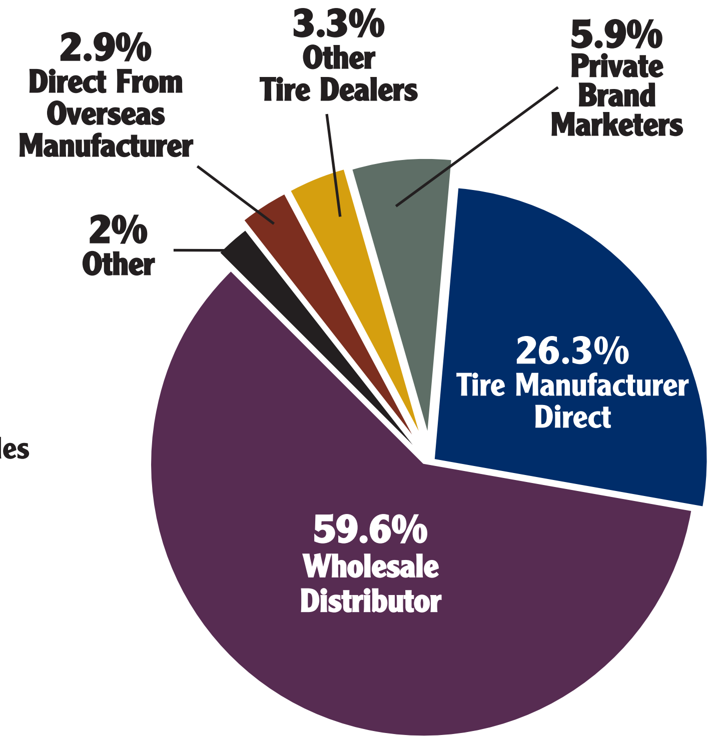
61% Will listen to dealer recommendation, but...

12% Won't switch at all

Which means that.....

88% Customers rely on dealer for the "right tire"

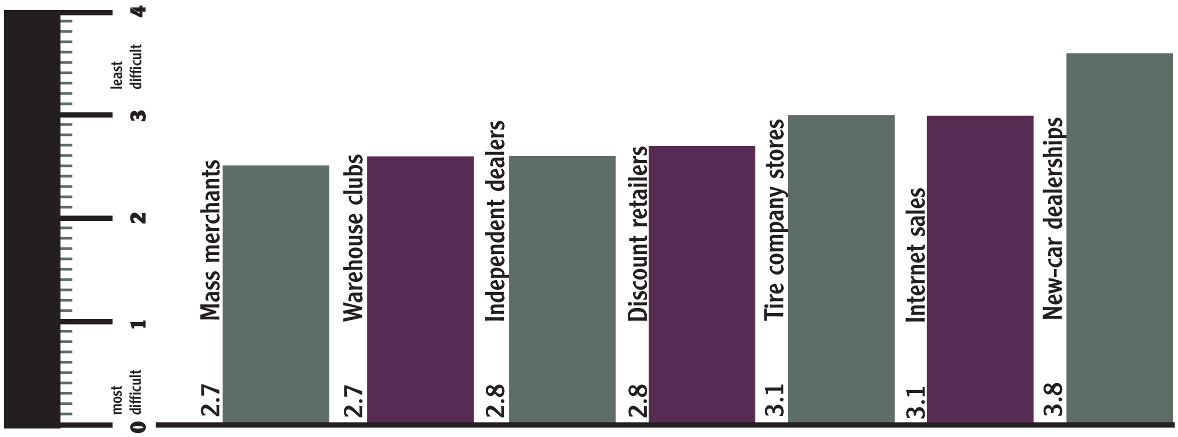
WHERE DEALERS GET CONSUMER TIRES



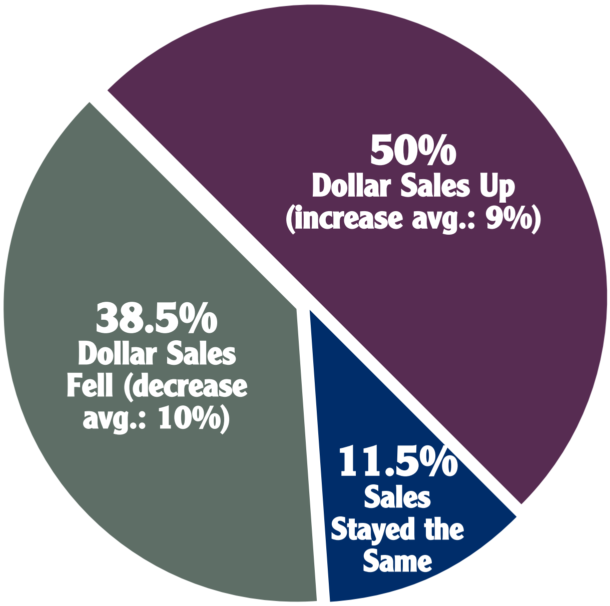
WHAT REPEAT CUSTOMERS MEAN TO TIRE/SERVICE SALES

% of Dealers Say Repeat Cutomers Represent...	...% of monthly sales
82.1% of dealers	51%+ of monthly sales
8.4%	41%-50%
4.2%	31%-40%
4.2%	21%-31%
1.1%	11%-20%
0%	1%-10%

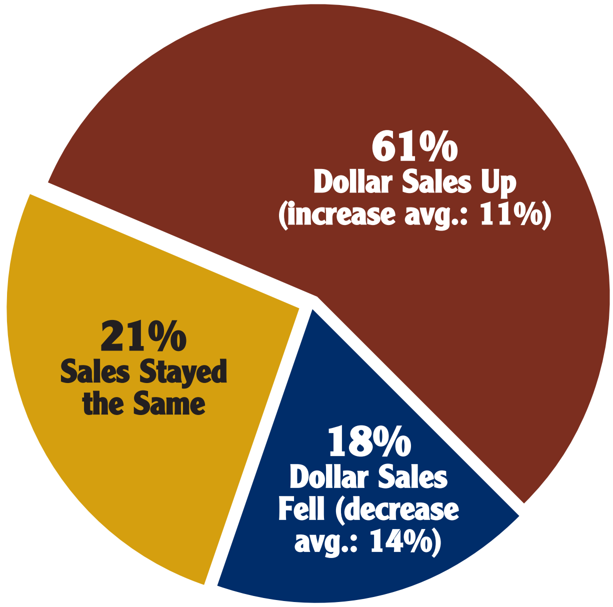
WHO DEALER SEES AS MOST DIFFICULT COMPETITION



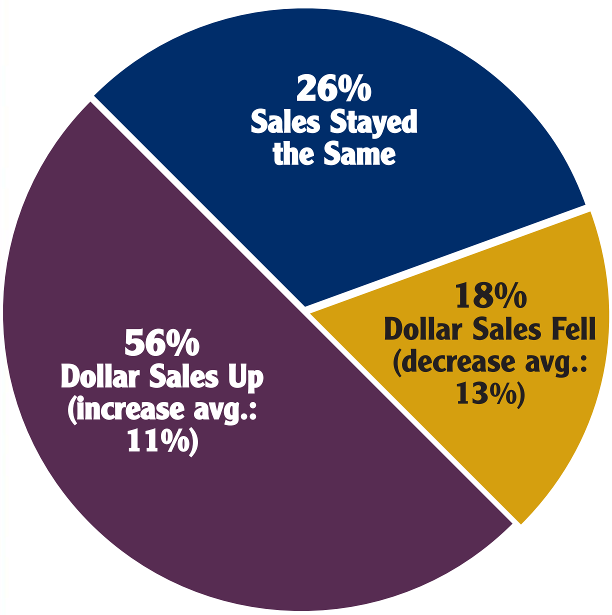
DEALER SALES VOLUME: CONSUMER TIRES
(2010 sales vs. 2009)



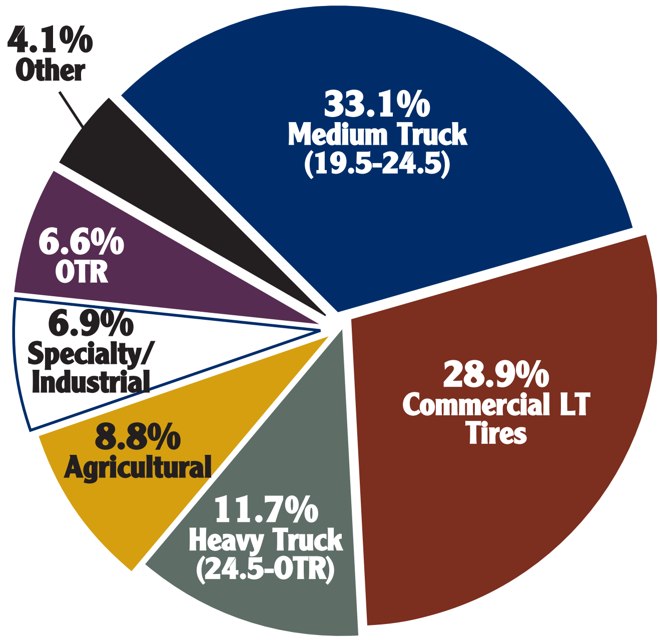
DEALER SALES VOLUME: COMMERCIAL TIRES
(2010 sales vs. 2009)



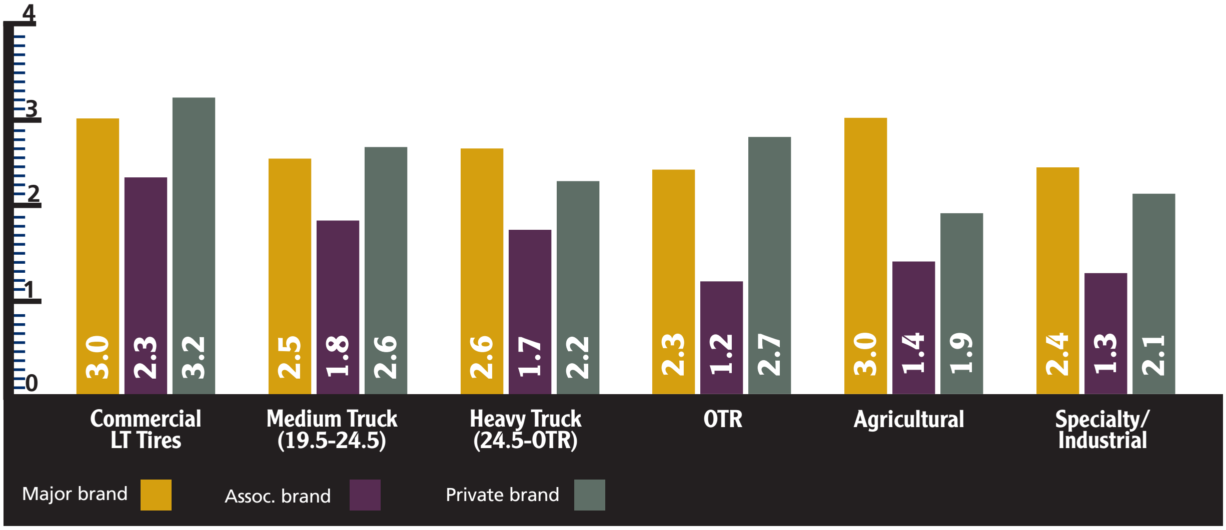
DEALER SALES VOLUME: VEHICLE SERVICE
(2010 sales vs. 2009)



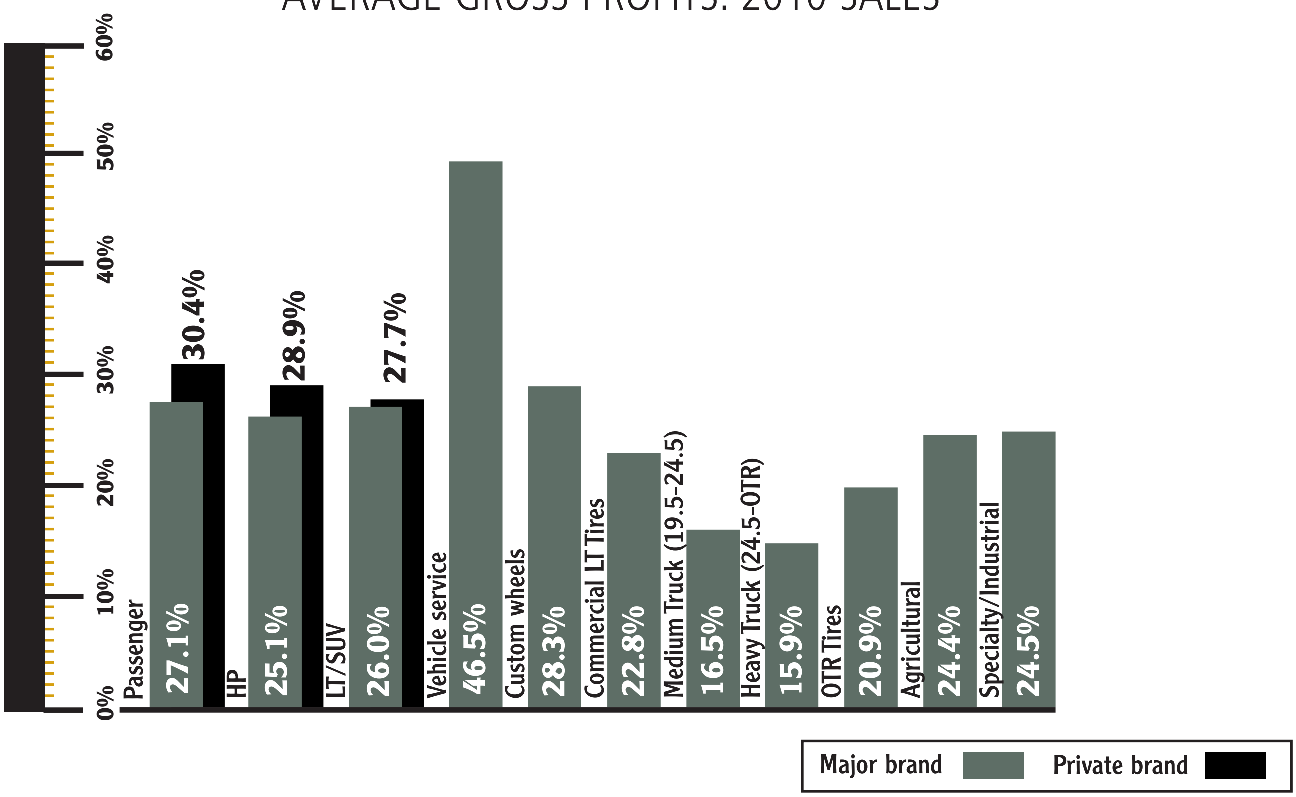
BREAKDOWN OF COMMERCIAL DEALER SALES - 2010



NUMBER OF BRANDS COMMERCIAL DEALERS CARRY



AVERAGE GROSS PROFITS: 2010 SALES



TIRE MARKET PROFILE

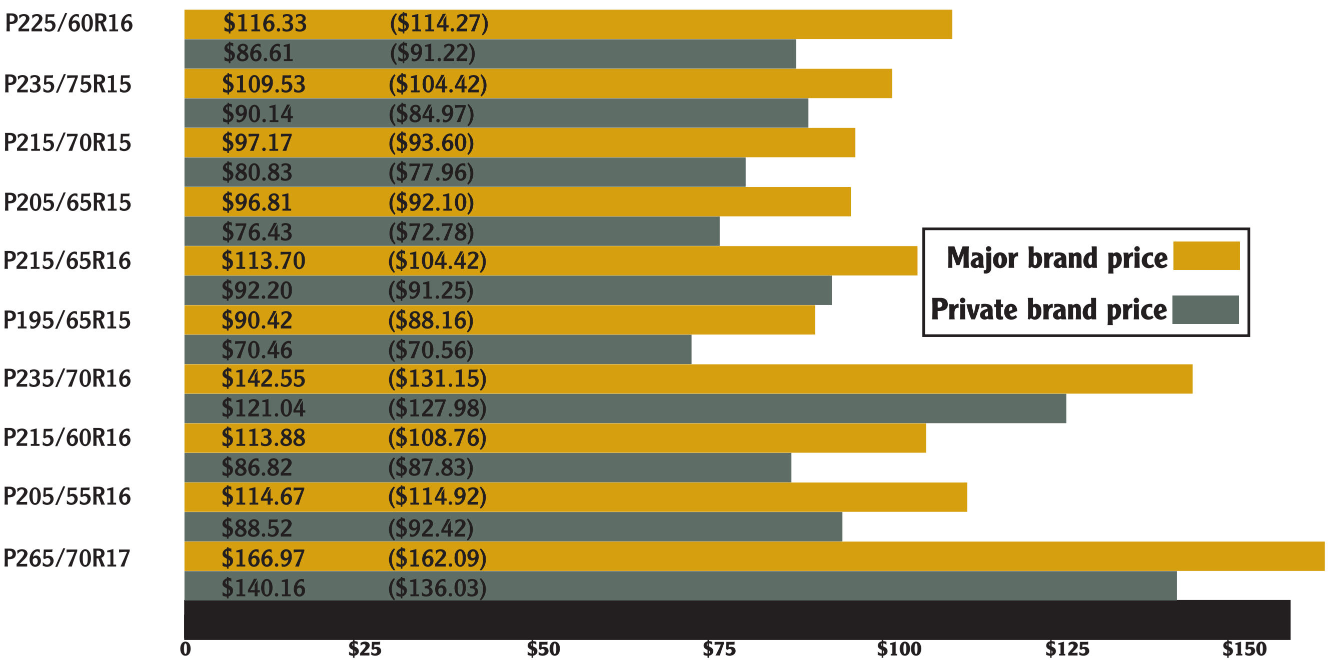
HOW DEALERS ADVERTISE/PROMOTE

(methods used, parenthesis denotes 2010 results, more than 100% due to multiple responses)

64% (55%)	Yellow pages	39% (36%)	Community service
44% (42%)	Newspaper ads	15% (15%)	Field sales force
44% (32%)	Direct mail	29% (29%)	Social media
61% (51%)	Website	10% (28%)	Other promotions
23% (31%)	Reminder cards	77% (75%)	Word of mouth
30% (34%)	Radio ads	3% (n/a)	Smartphone Apps
21% (22%)	Cable/local TV	15% (n/a)	Telemarketing

AVERAGE RETAIL PRICE: REPLACEMENT PASSENGER TIRES

(2010 most popular sizes: RMA)

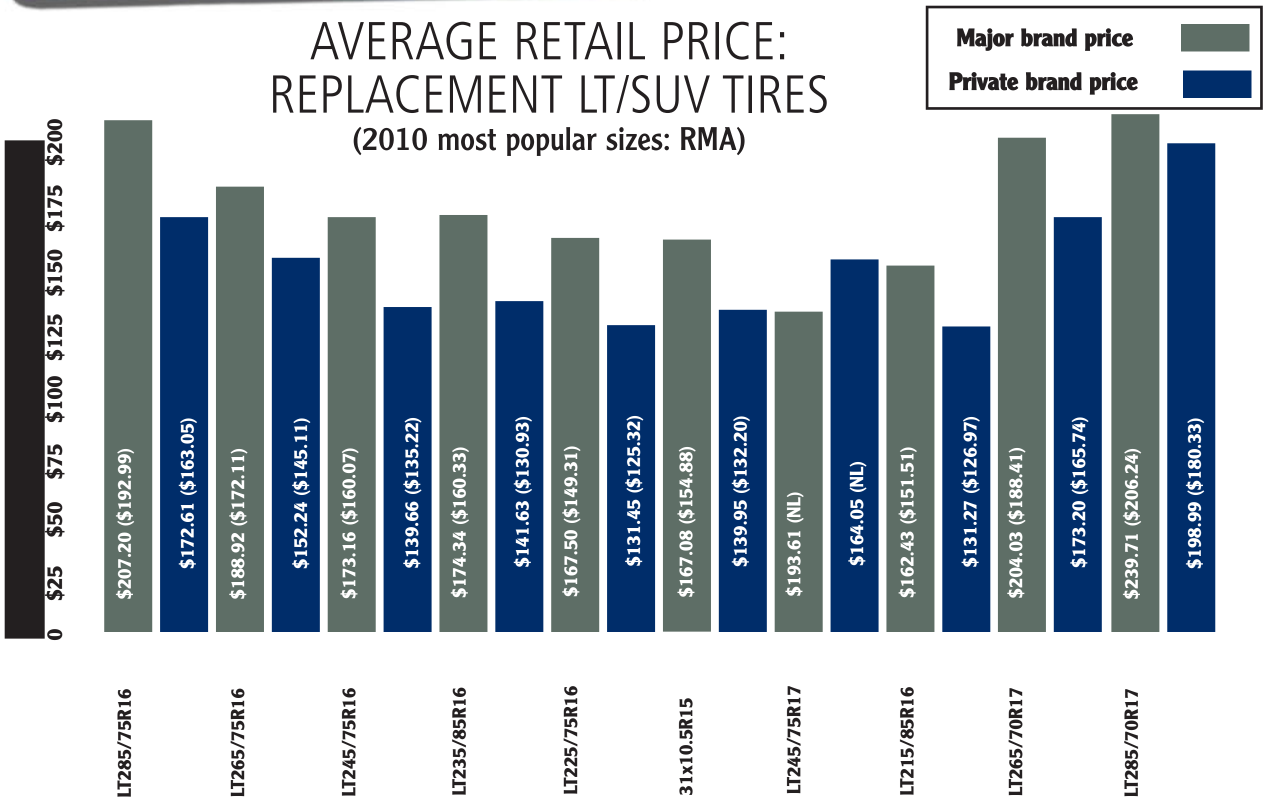


Figures in parenthesis are results from 2010 Tire Dealer Profile study. NL indicates that prices for that size were not tracked last year. Prices are for tires only.

TIRE MARKET PROFILE

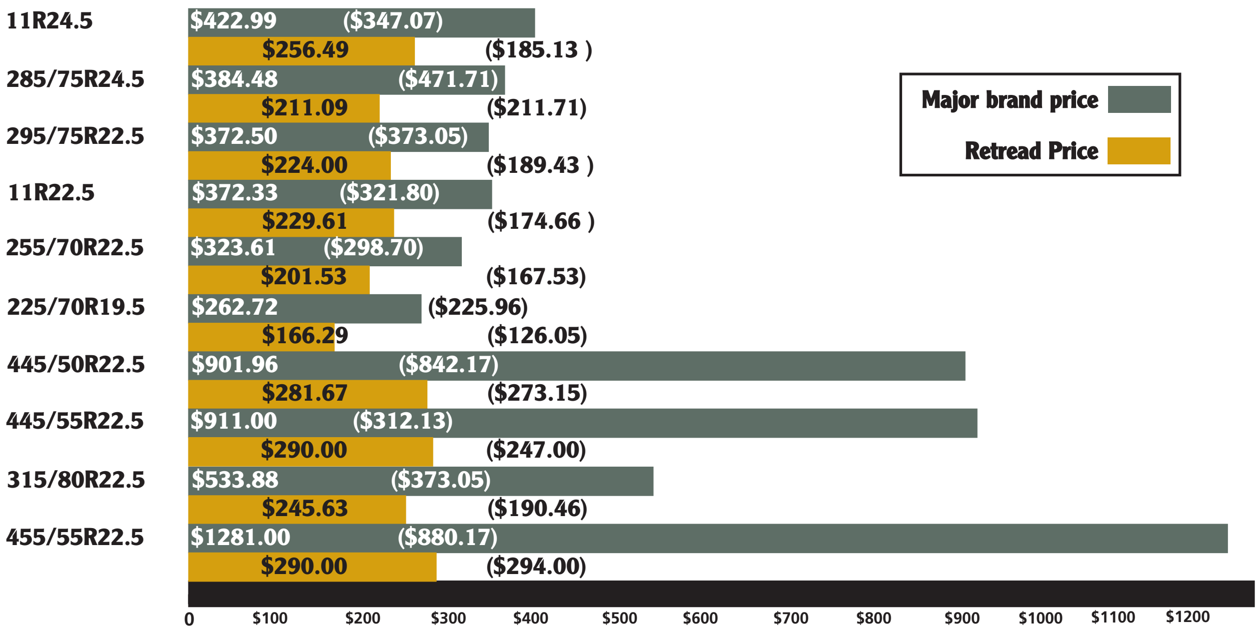
AVERAGE RETAIL PRICE: REPLACEMENT LT/SUV TIRES

(2010 most popular sizes: RMA)



AVERAGE SELLING PRICE: REPLACEMENT MEDIUM TRUCK TIRES

(2010 most popular sizes: RMA)



Figures in parenthesis are results from 2010 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.