



# MARKETPROFILE

2007 wasn't a banner year for the tire and automotive industries. While the tire side saw a slight improvement against 2006, tire shipments and sales did not meet expectations as gas and consumer goods prices began eating into household budgets. Growing fuel prices in late 2007 started an erosion in miles traveled and vehicle sales.

Cost pressures and continuing restructuring among tire-makers caused marketshare shifts as well, making it yet another interesting year to be a tire dealer – still the North American market leader in distribution.

But what will continuing, fully global market forces do to re-shape the tire industry?

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: tire brand market-shares in the tire dealer channel; tire shipments for passenger, light truck/SUV, medium truck, OTR and 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.

It's a dynamic and comprehensive look at a dynamic and fast-changing global industry.

## Brand Marketshares – Dealer Channel

### P-Metric Tires

2007 RMA Replacement Shipments: 204.03 million

Shares Rounded to Nearest 0.05%

| Brand       | Dealer Share | Brand       | Dealer Share | Brand           | Dealer Share |
|-------------|--------------|-------------|--------------|-----------------|--------------|
| Goodyear    | 12.80%       | Hankook     | 2.55%        | Falken          | 1.00%        |
| Michelin    | 8.70%        | Kumho       | 2.55%        | Sumitomo        | 1.00%        |
| Firestone   | 8.60%        | Kelly       | 2.20%        | Sigma           | 0.95%        |
| Bridgestone | 7.10%        | Yokohama    | 2.20%        | Big O           | 0.95%        |
| BFGoodrich  | 4.70%        | Dunlop      | 1.90%        | American Radial | 0.80%        |
| Cooper      | 4.60%        | Hercules    | 1.85%        | National        | 0.75%        |
| General     | 3.25%        | Mastercraft | 1.85%        | Regul           | 0.75%        |
| Multi-Mile  | 2.70%        | Cordovan    | 1.75%        | Dean            | 0.65%        |
| Uniroyal    | 2.65%        | Delta       | 1.55%        | Fuzion          | 0.45%        |
| Toyo        | 2.60%        | Pirelli     | 1.15%        | Wanli           | 0.20%        |
| Dayton      | 2.55%        | Continental | 1.05%        | Others          | 11.65%       |

### Performance (H-Rated & Above)

2007 RMA Replacement Shipments: 52.38 million

Shares Rounded to Nearest 0.05%

| Brand       | Dealer Share | Brand       | Dealer Share | Brand       | Dealer Share |
|-------------|--------------|-------------|--------------|-------------|--------------|
| Goodyear    | 15.15%       | Pirelli     | 3.15%        | Dayton      | 0.95%        |
| Michelin    | 12.90%       | Cooper      | 2.60%        | Nitto       | 0.70%        |
| Bridgestone | 8.85%        | Hankook     | 2.55%        | Big O       | 0.65%        |
| Yokohama    | 7.45%        | Sumitomo    | 2.55%        | Nexen       | 0.45%        |
| Toyo        | 7.25%        | General     | 2.25%        | Mastercraft | 0.40%        |
| BFGoodrich  | 6.50%        | Continental | 2.10%        | Others      | 0.15%        |
| Firestone   | 5.30%        | Uniroyal    | 1.35%        |             |              |
| Dunlop      | 4.95%        | Kelly       | 1.30%        |             |              |
| Kumho       | 4.45%        | Multi-Mile  | 1.15%        |             |              |
| Falken      | 3.95%        | Wanli       | 0.95%        |             |              |



## Brand Marketshares – Dealer Channel

### LT-Metric

2007 RMA Replacement Shipments: 34.19 million

Shares Rounded to Nearest .05%

| Brand           | Dealer Share |
|-----------------|--------------|
| Goodyear        | 10.25%       |
| BFGoodrich      | 8.85%        |
| Bridgestone     | 7.20%        |
| Michelin        | 7.05%        |
| Firestone       | 6.80%        |
| Cooper          | 6.60%        |
| Multi-Mile      | 5.50%        |
| General         | 4.95%        |
| Kelly           | 3.40%        |
| Toyo            | 3.20%        |
| Mastercraft     | 2.90%        |
| Cordovan        | 2.55%        |
| Yokohama        | 2.55%        |
| Uniroyal        | 2.40%        |
| Delta           | 2.05%        |
| Dunlop          | 1.90%        |
| Dayton          | 1.75%        |
| Continental     | 1.70%        |
| Kumho           | 1.65%        |
| Pirelli         | 1.20%        |
| Hankook         | 1.20%        |
| National        | 1.10%        |
| Hercules        | 1.10%        |
| Big O           | 0.95%        |
| Laramie         | 0.90%        |
| Eldorado        | 0.85%        |
| Mickey Thompson | 0.65%        |
| Others          | 8.80%        |

### Medium Truck

2007 RMA Replacement Shipments: 16.57 million

Shares Rounded to Nearest .05%

| Brand       | Dealer Share |
|-------------|--------------|
| Goodyear    | 19.20%       |
| Bridgestone | 17.90%       |
| Michelin    | 16.95%       |
| Firestone   | 6.90%        |
| Yokohama    | 5.05%        |
| Toyo        | 4.80%        |
| General     | 4.60%        |
| Sumitomo    | 2.75%        |
| Hankook     | 2.50%        |
| Kelly       | 2.45%        |
| Dunlop      | 2.35%        |
| Kumho       | 2.20%        |
| Continental | 2.10%        |
| Power King  | 1.70%        |
| Hercules    | 1.55%        |
| BFGoodrich  | 1.25%        |
| Double Coin | 1.15%        |
| Others      | 4.60%        |

### OTR

2007 Industry Replacement Shipments: 138.14 thousand

Shares Rounded to Nearest .05%

| Brand       | Bias Share | Radial Share |
|-------------|------------|--------------|
| Bridgestone | 9.45%      | 37.90%       |
| Firestone   | 26.65%     | --           |
| Michelin    | --         | 27.50%       |
| Goodyear    | 28.30%     | 24.65%       |
| General     | 18.00%     | --           |
| Titan       | 8.10%      | --           |
| Continental | --         | 3.70%        |
| Others      | 17.60%     | 6.25%        |

### Agricultural

2007 Industry Replacement Shipments: 1.97 million

Shares Rounded to Nearest .05%

#### Rear Tire Segment

| Brand        | Bias Share | Radial Share |
|--------------|------------|--------------|
| Firestone    | 43.25%     | 37.40%       |
| Goodyear     | 15.50%     | 30.00%       |
| Titan        | 18.65%     | 10.10%       |
| Univ. Co-Op  | 6.00%      | 8.30%        |
| Michelin     | --         | 8.35%        |
| BFGoodrich   | --         | 2.50%        |
| Harvest King | 4.10%      | --           |
| Akuret       | 3.20%      | --           |
| Alliance     | 1.70%      | 1.00%        |
| Galaxy       | 2.10%      | --           |
| Denman       | 0.85%      | --           |
| Trelleborg   | 1.00%      | 0.75%        |
| Others       | 3.65%      | 1.60%        |

#### Front/Implement Tire Segment

| Brand           | Share  |
|-----------------|--------|
| Firestone       | 38.40% |
| Titan           | 16.80% |
| Goodyear        | 16.70% |
| Univ. Co-Op     | 6.50%  |
| Harvest King    | 5.30%  |
| American Farmer | 5.00%  |
| Denman          | 2.70%  |
| Galaxy          | 1.70%  |
| Alliance        | 1.00%  |
| Trelleborg      | 0.50%  |
| Others          | 5.40%  |



# MARKETPROFILE

## 2007 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 | 196.16      | 48.18 |
| 2007 | 204.03      | 46.26 |

(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 |
| 2007 | 9.24        | 1.70 |

(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 | 33.56       | 5.01 |
| 2007 | 34.19       | 4.43 |

(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 | 16.86       | 6.83 | 14.70    |
| 2007 | 16.57       | 4.65 | 15.20    |

(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  |
| 2007 | 62.63       | 75.51  | 28.74 | 60.00  |

(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 |
| 2007 | 1.3         | 0.67 | 0.36 | 0.65 |

(Source: TR Estimates)

## 2007 Top Tire Sizes – U.S.

### Replacement P-Metric

| Rank | Size       | Share |
|------|------------|-------|
| 1    | P225/60R16 | 4.8%  |
| 2    | P235/75R15 | 4.3%  |
| 3    | P205/65R15 | 3.2%  |
| 4    | P215/70R15 | 2.6%  |
| 5    | P205/70R15 | 2.4%  |
| 6    | P265/70R17 | 2.4%  |
| 7    | P215/60R16 | 2.1%  |
| 8    | P195/65R15 | 2.0%  |
| 9    | P265/70R16 | 1.8%  |
| 10   | P235/70R16 | 1.8%  |

### OE P-Metric

| Rank | Size       | Share |
|------|------------|-------|
| 1    | P215/60R16 | 5.8%  |
| 2    | P245/65R17 | 4.4%  |
| 3    | P235/70R16 | 4.3%  |
| 4    | P265/70R17 | 4.0%  |
| 5    | P195/60R15 | 3.1%  |
| 6    | P275/55R20 | 2.6%  |
| 7    | 215/60R16  | 2.5%  |
| 8    | P225/50R17 | 2.4%  |
| 9    | P255/70R18 | 2.4%  |
| 10   | P275/65R18 | 2.3%  |

### Replacement LT-Metric

| Rank | Size        | Share |
|------|-------------|-------|
| 1    | LT265/75R16 | 15.7% |
| 2    | LT245/75R16 | 15.4% |
| 3    | LT235/85R16 | 11.5% |
| 4    | LT225/75R16 | 8.0%  |
| 5    | 31x10.50R15 | 6.7%  |
| 6    | LT285/75R16 | 5.9%  |
| 7    | LT265/70R17 | 5.0%  |
| 8    | LT215/85R16 | 4.4%  |
| 9    | LT235/75R15 | 4.3%  |
| 10   | 30x9.50R15  | 1.8%  |

### OE LT-Metric

| Rank | Size          | Share |
|------|---------------|-------|
| 1    | LT245/75R16   | 40.8% |
| 2    | LT225/75R16   | 16.3% |
| 3    | LT265/70R17   | 12.5% |
| 4    | LT245/75R17   | 5.4%  |
| 5    | LT275/65R20   | 4.1%  |
| 6    | LT215/85R16   | 3.3%  |
| 7    | LT265/75R16   | 3.3%  |
| 8    | 37x12.50R16.5 | 2.6%  |
| 9    | LT275/65R18   | 1.7%  |
| 10   | LT255/75R17   | 1.6%  |

### Replacement Medium Truck

| Rank | Size        | Share |
|------|-------------|-------|
| 1    | 295/75R22.5 | 26.6% |
| 2    | 11R22.5     | 23.4% |
| 3    | 11R24.5     | 12.9% |
| 4    | 285/75R24.5 | 7.8%  |
| 5    | 225/70R19.5 | 5.3%  |

### OE Medium Truck

| Rank | Size        | Share |
|------|-------------|-------|
| 1    | 295/75R22.5 | 29.4% |
| 2    | 11R22.5     | 25.6% |
| 3    | 225/70R19.5 | 10.7% |
| 4    | 11R24.5     | 9.3%  |
| 5    | 245/70R19.5 | 3.4%  |

(Source: RMA)

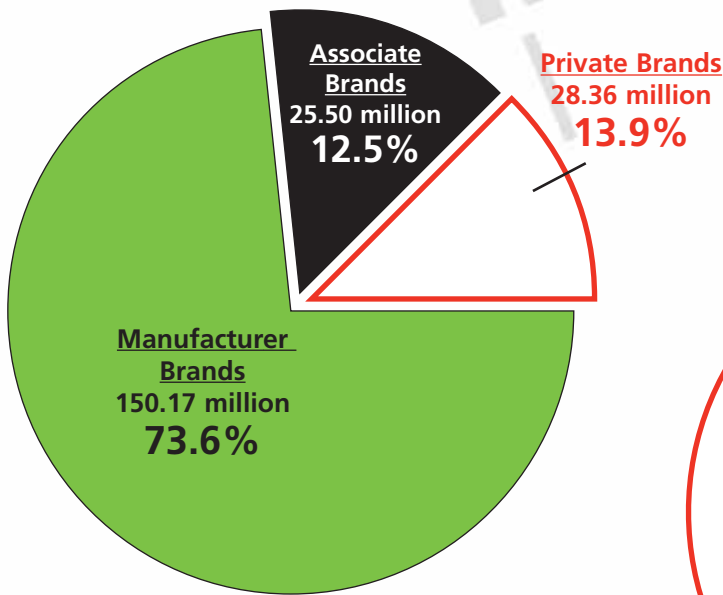


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## 2007 U.S. Brand-Type Shares

### P-Metric Replacement

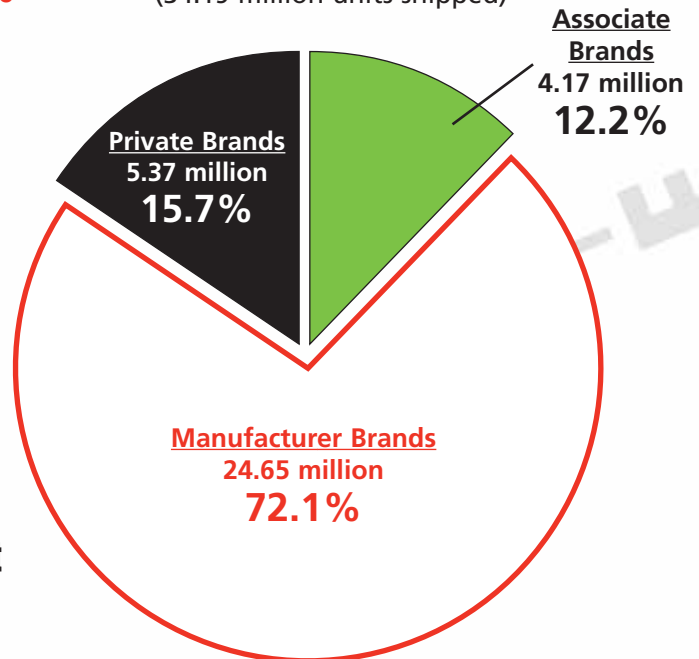
(204.03 million units shipped)



(Source: RMA)

### LT-Metric Replacement

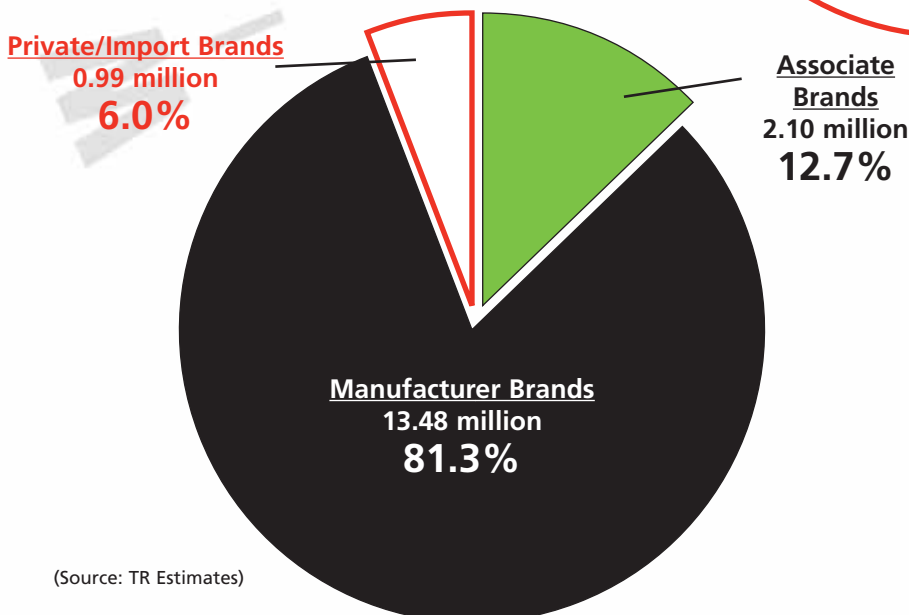
(34.19 million units shipped)



(Source: RMA)

### Medium Truck Replacement

(16.57 million units shipped)



(Source: TR Estimates)

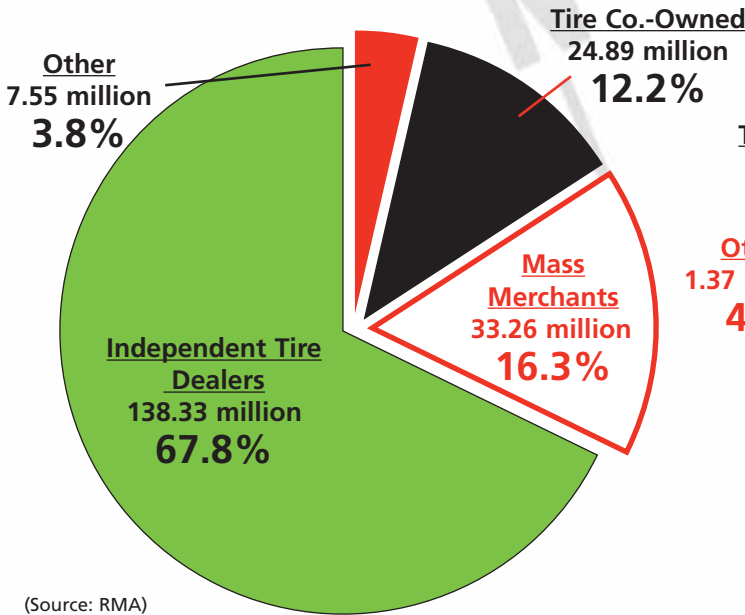


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## 2007 U.S. Distribution Channel Shares

### P-Metric

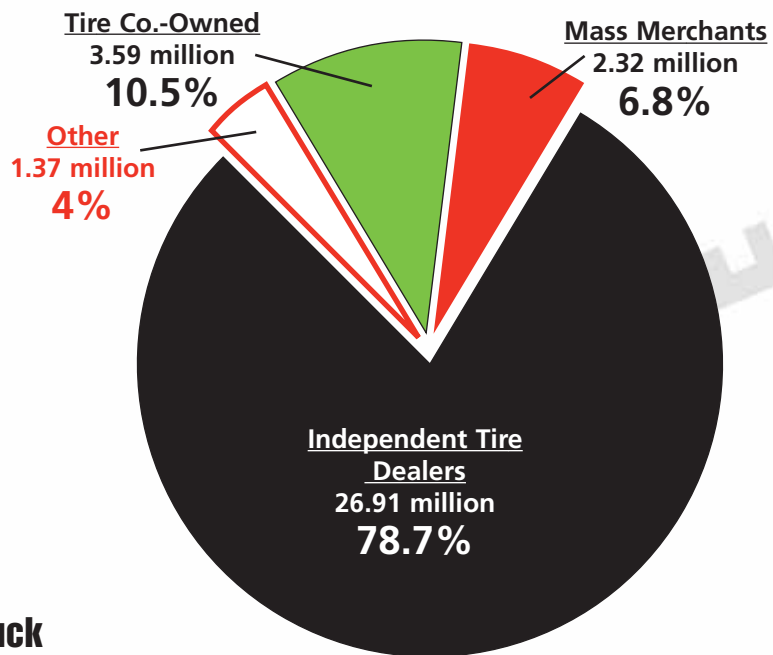
(204.03 million units shipped)



(Source: RMA)

### LT-Metric

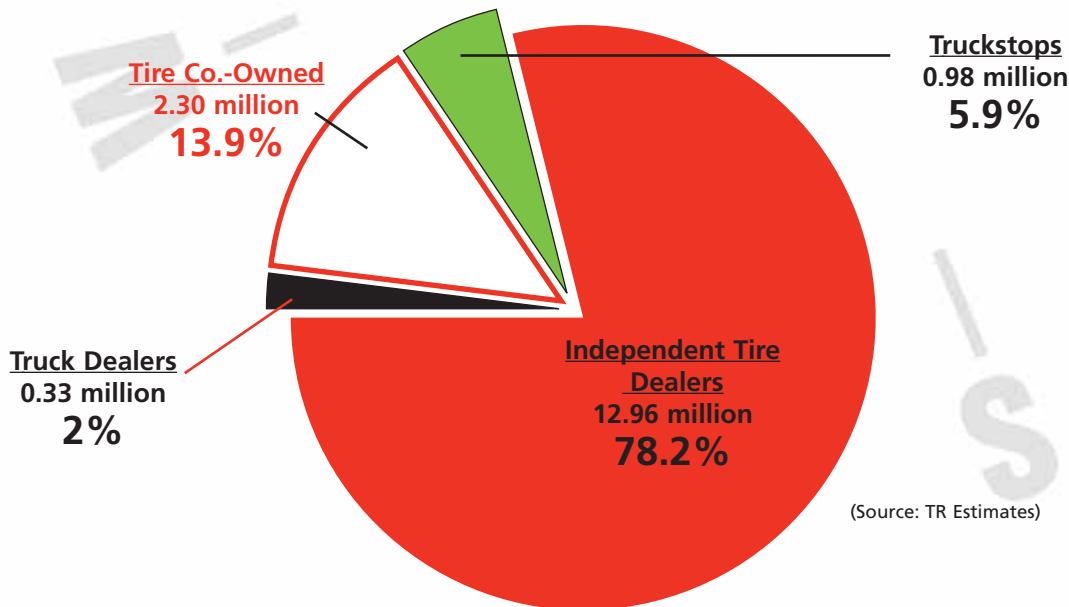
(34.19 million units shipped)



(Source: RMA)

### Medium Truck

(16.57 million units shipped)



(Source: TR Estimates)



## 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 |

(Source: Rubber Association of Canada)

## 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 |

(Source: Rubber Association of Canada)

# 2007 Canada Tire Shipments

## 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        |

(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        |
| 2007 | 2.37        |

(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 |
| 2007 | 1.36        | 0.38 |

(Source: Rubber Association of Canada)

# 2007 Top Replacement Tire Sizes – Canada

## P-Metric Tires

| Rank | Size       | Share |
|------|------------|-------|
| 1    | P215/70R15 | 4.0%  |
| 2    | P225/60R16 | 3.9%  |
| 3    | P195/65R15 | 3.9%  |
| 4    | P185/65R14 | 3.4%  |
| 5    | 195/65R15  | 3.0%  |
| 6    | P215/65R16 | 2.8%  |
| 7    | 205/55R16  | 2.8%  |
| 8    | P205/70R15 | 2.4%  |
| 9    | P235/75R15 | 2.4%  |
| 10   | P205/65R15 | 2.3%  |

## Performance Tires

| Rank | Size       | Share |
|------|------------|-------|
| 1    | 205/55R16  | 8.2%  |
| 2    | 195/65R15  | 5.6%  |
| 3    | 195/60R15  | 4.8%  |
| 4    | P205/55R16 | 4.0%  |
| 5    | 205/60R16  | 2.9%  |
| 6    | 205/50R16  | 2.6%  |
| 7    | P225/60R16 | 2.5%  |
| 8    | 225/60R16  | 2.3%  |
| 9    | 225/45R17  | 2.2%  |
| 10   | 205/65R15  | 2.1%  |

## Winter Tires

| Rank | Size       | Share |
|------|------------|-------|
| 1    | 195/65R15  | 6.9%  |
| 2    | 205/55R16  | 5.3%  |
| 3    | 215/65R16  | 4.2%  |
| 4    | P195/65R15 | 3.9%  |
| 5    | 215/70R15  | 3.2%  |
| 6    | 185/65R14  | 2.8%  |
| 7    | 215/60R16  | 2.7%  |
| 8    | 225/60R16  | 2.6%  |
| 9    | P195/60R15 | 2.6%  |
| 10   | P185/65R14 | 2.6%  |

## LT-Metric Tires

| Rank | Size        | Share |
|------|-------------|-------|
| 1    | LT245/75R16 | 20.7% |
| 2    | LT265/75R16 | 13.7% |
| 3    | LT235/85R16 | 9.7%  |
| 4    | LT225/75R16 | 9.5%  |
| 5    | LT265/70R17 | 9.4%  |
| 6    | LT235/75R15 | 5.4%  |
| 7    | LT285/75R16 | 3.7%  |
| 8    | LT215/85R16 | 3.2%  |
| 9    | 31x10.50R15 | 3.1%  |
| 10   | LT285/70R17 | 1.9%  |

(Source: Rubber Association of Canada)

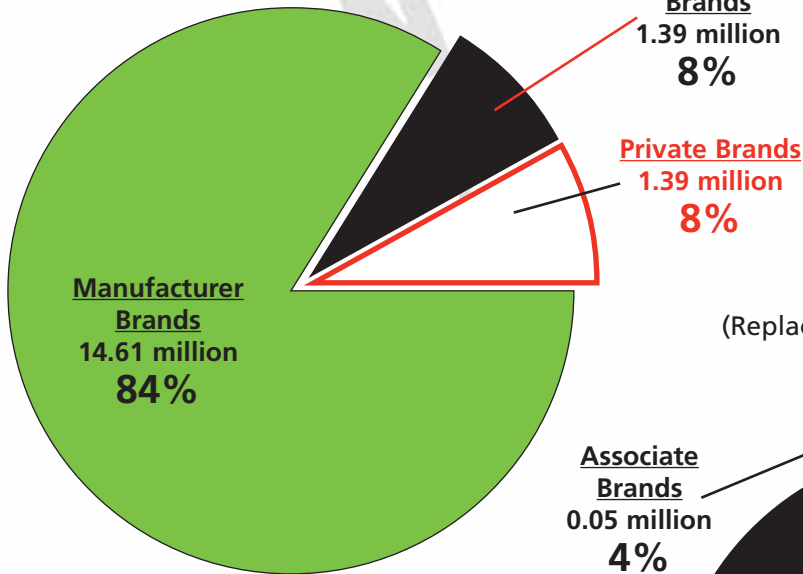


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## 2007 Canada Brand-Type Shares

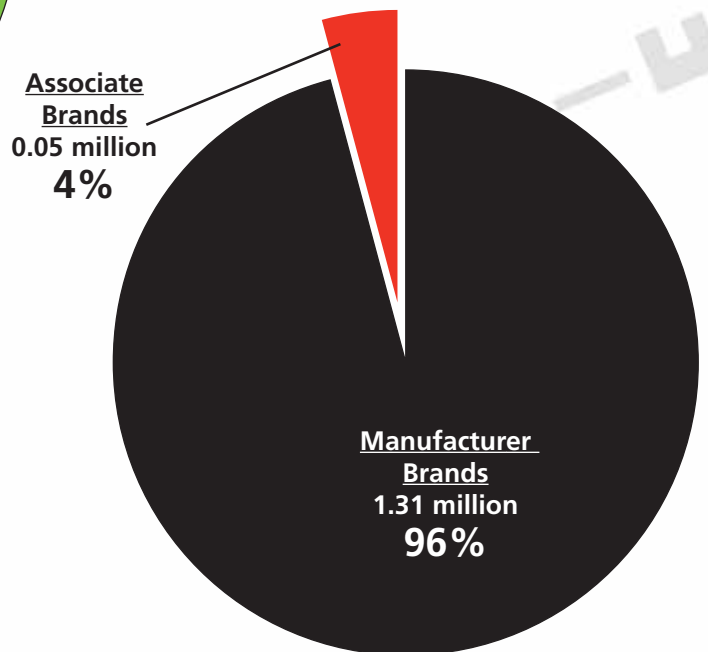
### P-Metric

(Replacement – 17.39 million units shipped)



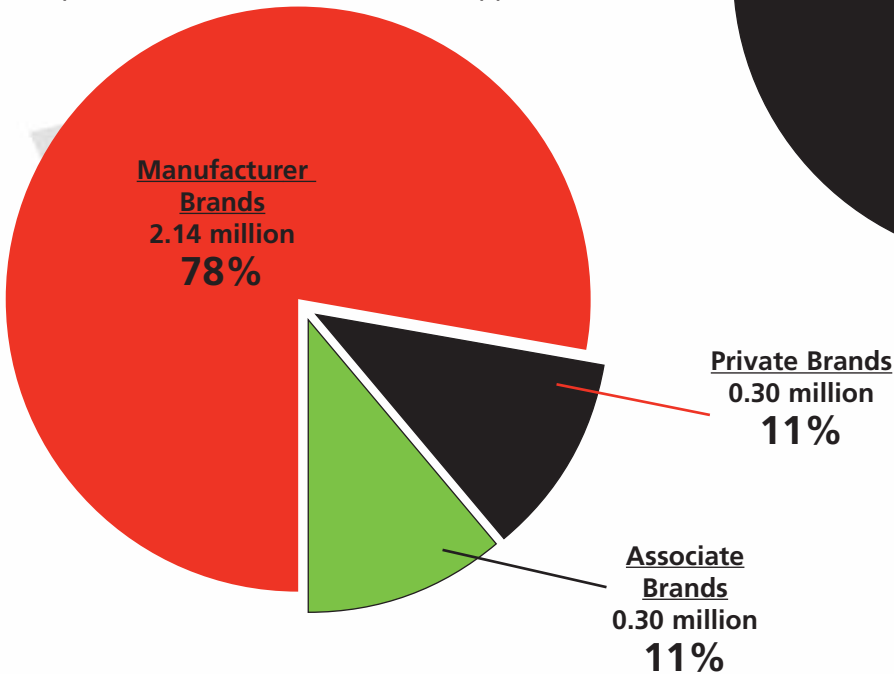
### Medium Truck

(Replacement – 1.36 million units shipped)



### LT-Metric

(Replacement – 2.74 million units shipped)



(Source: Rubber Association of Canada)



# MARKETPROFILE

## Speed-Rated Tire Breakdown

### OE Market

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

| Year            | H-Rated | V-Rated | Z-Rated | Other Speed Rated |
|-----------------|---------|---------|---------|-------------------|
| <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%   | 78.4%             |
| (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             |

(Source: RMA)

### Replacement Market

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

| Year                  | H-Rated | V-Rated | Z-Rated | Other Speed Rated |
|-----------------------|---------|---------|---------|-------------------|
| <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%             |
| (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            |

(Source: RMA)



# MARKETPROFILE

## Vehicle Registrations & Sales

### 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         |
| 2007 | 135.22 | 105.69  | 3.35       | 5.22       | 249.49         |

(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          |
| 2007 | 11.60 | 7.54    | 0.26       | 0.59       | 19.99          |

(Source: Statistics Canada, TR Estimates)

### Average Age of Cars & Light Trucks

| Year | Passenger |        | All Light |
|------|-----------|--------|-----------|
|      | Cars      | Trucks | Vehicles  |
| 1997 | 8.7       | 8.3    | N/A       |
| 1998 | 8.9       | 8.3    | N/A       |
| 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       |

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

### Global Passenger Vehicle Sales – Top 20 Nations

|             | 2005       | 2006       | 2007       | Change (06-07) |
|-------------|------------|------------|------------|----------------|
| U.S.        | 16,953,563 | 16,515,725 | 16,457,183 | -0.35%         |
| China       | 5,454,427  | 6,894,697  | 7,953,223  | 15.35%         |
| Japan       | 5,727,557  | 5,557,938  | 5,575,859  | 0.32%          |
| Germany     | 3,539,067  | 3,676,856  | 3,596,123  | -2.20%         |
| Italy       | 2,458,692  | 2,570,053  | 2,760,200  | 7.40%          |
| U.K.        | 2,768,885  | 2,677,229  | 2,641,184  | -1.35%         |
| France      | 2,488,840  | 2,440,045  | 2,488,231  | 1.97%          |
| Russia      | 1,541,751  | 1,924,317  | 2,145,784  | 11.51%         |
| Brazil      | 1,622,438  | 1,844,209  | 1,954,492  | 5.98%          |
| Spain       | 1,916,832  | 1,910,124  | 1,887,653  | -1.18%         |
| India       | 1,244,273  | 1,522,696  | 1,806,915  | 18.67%         |
| Canada      | 1,578,944  | 1,614,588  | 1,616,601  | 0.12%          |
| Korea       | 1,110,779  | 1,160,109  | 1,249,545  | 7.71%          |
| Mexico      | 1,125,149  | 1,132,765  | 1,160,885  | 2.48%          |
| Middle East | 919,293    | 992,591    | 1,120,801  | 12.92%         |
| Australia   | 967,752    | 941,642    | 977,499    | 3.81%          |
| Africa      | 597,741    | 690,053    | 757,683    | 9.80%          |
| Thailand    | 694,915    | 674,146    | 700,740    | 3.94%          |
| Turkey      | 720,096    | 623,432    | 651,946    | 4.57%          |
| Netherlands | 530,644    | 548,547    | 588,296    | 7.25%          |

(Source: AASA)



# MARKETPROFILE

## Vehicle Sales & Mileage

### 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 | 5.70     | 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  | 0.180     | 0.22      | 0.40  | 16.55          |

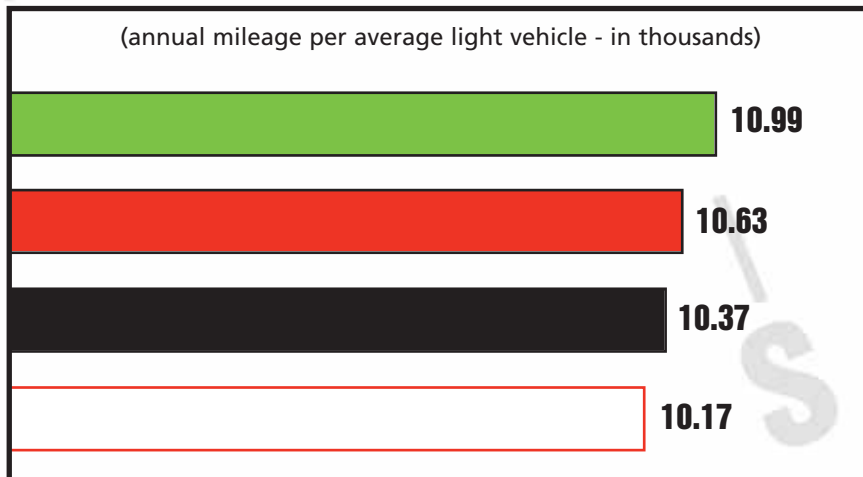
(Source: AATA)

### North American Vehicle Sales (number of units)

| Year      | U.S. Total | Canada Total | Mexico Total | N. American Total | Percent Change |
|-----------|------------|--------------|--------------|-------------------|----------------|
| 2000      | 17,754,479 | 1,585,791    | 853,775      | 20,194,045        | 3.2%           |
| 2001      | 17,416,841 | 1,596,308    | 918,835      | 19,931,984        | -1.3%          |
| 2002      | 17,095,073 | 1,730,709    | 977,616      | 19,803,398        | -0.6%          |
| 2003      | 16,922,014 | 1,624,022    | 977,870      | 19,523,906        | -1.4%          |
| 2004      | 17,245,152 | 1,573,399    | 1,095,636    | 19,914,187        | 2.0%           |
| 2005      | 17,389,709 | 1,628,030    | 1,131,768    | 20,149,507        | 1.2%           |
| 2006      | 16,993,441 | 1,665,233    | 1,140,142    | 19,798,816        | -1.7%          |
| 2007      | 16,397,337 | 1,688,387    | 1,092,744    | 19,160,468        | -3.2%          |
| 2006/2007 | -3.6%      | 1.4%         | -4.2%        | -3.2%             | --             |

(Source: AASA)

### Projected Average Annual Consumer Driving Miles

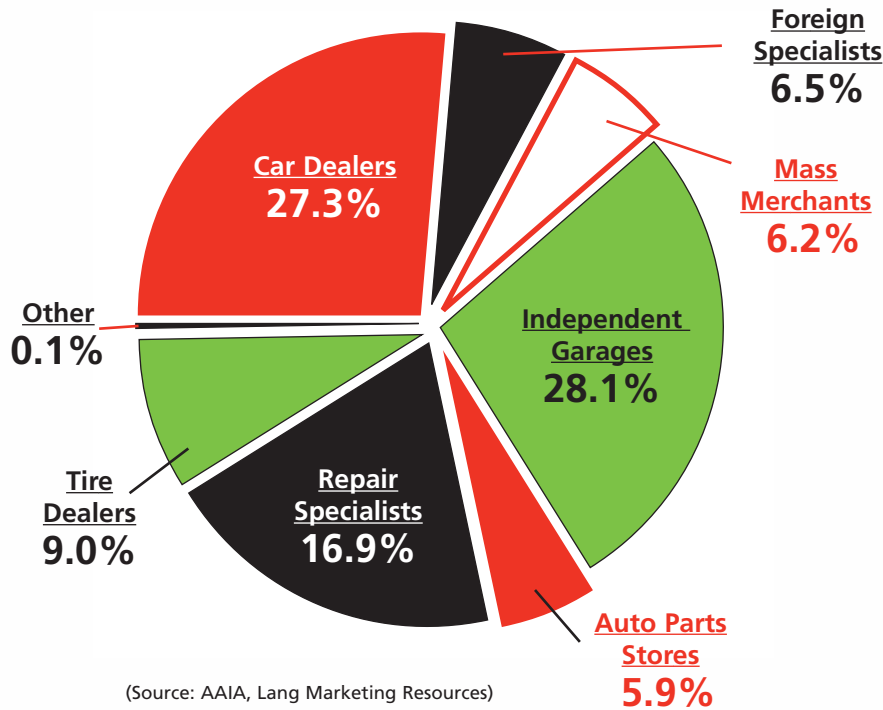


(Source: AATA, Lang Marketing Resources)



## Vehicle Service Overview

### Vehicle Service Sales: 2007 Marketshare



### Vehicle Service as Share of Outlet Sales

(parts and service sales)

|                     | 2000  | 2007  | Share Change<br>2000-2007 |
|---------------------|-------|-------|---------------------------|
| Independent Garages | 37.6% | 40.4% | +2.8%                     |
| Car Dealers         | 45.1% | 47.0% | +1.9%                     |
| Repair Specialists  | 42.1% | 43.6% | +1.5%                     |
| Foreign Specialists | 46.8% | 47.1% | +0.3%                     |
| Tire Dealers        | 40.0% | 41.7% | +1.7%                     |
| Auto Parts Stores   | 41.7% | 41.7% | 0.0%                      |
| Mass Merchants      | 42.1% | 42.1% | 0.0%                      |
| Other               | 40.0% | 50.0% | +10.0%                    |
| Total               | 41.7% | 43.6% | +1.9%                     |

(Source: AAIA, Lang Marketing Resources)



# MARKETPROFILE

## Vehicle Sales By Type

### 2007 Top U.S. Passenger Cars

| <u>Brand</u>    | <u>Model</u>         | <u>Sales</u> |
|-----------------|----------------------|--------------|
| Toyota .....    | Camry .....          | 473,108      |
| Honda .....     | Accord .....         | 392,231      |
| Toyota .....    | Corolla/Matrix ..... | 371,390      |
| Honda .....     | Civic .....          | 331,095      |
| Chevrolet ..... | Impala .....         | 311,128      |
| Nissan .....    | Altima .....         | 284,762      |
| Chevrolet.....  | Cobalt .....         | 200,620      |
| Toyota .....    | Prius .....          | 181,221      |
| Ford .....      | Focus .....          | 173,213      |
| Pontiac .....   | G6 .....             | 150,001      |
| Ford .....      | Fusion.....          | 149,552      |
| Hyundai .....   | Sonata .....         | 145,568      |
| BMW.....        | 3 Series .....       | 142,488      |
| Ford .....      | Mustang.....         | 134,626      |
| Chevrolet ..... | Malibu .....         | 128,329      |
| Chrysler.....   | 300 Series .....     | 120,636      |
| Mazda .....     | Mazda 3.....         | 120,291      |
| Dodge .....     | Charger .....        | 119,289      |
| Nissan .....    | Sentra.....          | 106,522      |
| Dodge .....     | Caliber .....        | 101,079      |

### 2007 Top U.S. SUVs

| <u>Brand</u>    | <u>Model</u>        | <u>Sales</u> |
|-----------------|---------------------|--------------|
| Honda .....     | CR-V.....           | 193,600      |
| Toyota .....    | RAV-4 .....         | 172,752      |
| Ford .....      | Escape .....        | 165,596      |
| Chevrolet ..... | Tahoe .....         | 146,256      |
| Ford .....      | Explorer .....      | 137,817      |
| Chevrolet ..... | TrailBlazer .....   | 134,626      |
| Ford .....      | Edge .....          | 130,125      |
| Toyota .....    | Highlander .....    | 127,878      |
| Jeep .....      | Grand Cherokee..... | 120,937      |
| Jeep .....      | Wrangler.....       | 119,243      |

### 2007 Top U.S. Pick-Up Trucks

| <u>Brand</u>    | <u>Model</u>           | <u>Sales</u> |
|-----------------|------------------------|--------------|
| Chevrolet ..... | Silverado/Sierra ..... | 826,500      |
| Ford.....       | F-Series .....         | 634,201      |
| Dodge .....     | Ram .....              | 357,707      |
| Toyota .....    | Tundra .....           | 196,555      |
| Toyota .....    | Tacoma .....           | 173,238      |

(Source: AASA)