

TIRE MARKET PROFILE

Regardless of what part of the tire industry you work, it's hard to hit a moving target. With all of the shifts and changes and re-directions we've witnessed over the last 20 years, it's hard for anyone to stay ahead of the game. To help steady the target, we've compiled this comprehensive Tire Market Profile section. Combining real-world data from a range of resources –

including TIRE REVIEW's annual Tire Dealer Profile and research from key associations and government bodies – this section will help you gain a better perspective, see emerging trends, and prepare your business for the road ahead.

Through painstaking research, we've been able to assemble this collection of data points, including the top 25 global tiremakers; tire import data; dealer channel brand marketshares; tire shipments by segment; a rundown on the most popular tire sizes at OE and replacement; brand and distribution channel segmentation; new vehicle sales; vehicle registrations; miles driven by vehicle type and much, much more.

TIRE REVIEW's Dealer Profile Study is our annual survey of hundreds of independent tire dealers throughout North America, who offered their insights on the structure and size and operations of today's tire dealer, including a look at tire pricing levels, buying patterns, service equipment ownership and much more.

TOP 25 GLOBAL TIRE MANUFACTURERS 2014

[Note: Sales figures are from 2013 corporate financial reports and media sources. Many companies listed here produce and sell non-tire goods, but amounts shown here are for all revenue. All figures in billions, U.S. dollars.]

Company	Country	2012 Sales	2013 Sales
Continental AG	Germany	\$43.16	\$45.55
Bridgestone Corp.	Japan	\$35.11	\$36.50
Groupe Michelin	France	\$28.31	\$26.90
Goodyear Tire & Rubber Co.	U.S.	\$21.00	\$19.54
Pirelli & C SpA	Italy	\$8.01	\$8.46
Sumitomo Rubber Industries Ltd.	Japan	\$9.36	\$7.99
Hankook Tire Co.	South Korea	\$6.60	\$6.81
Yokohama Rubber Corp.	Japan	\$6.47	\$5.91
Cheng Shin Rubber/Maxxis	Taiwan	\$4.50	\$4.46
Giti Tire Pte. Ltd.	Singapore	\$3.98	\$4.04
Hangzhou Zhongce Rubber Co.	China	\$3.88	\$3.96
Toyo Tire & Rubber Co.	Japan	\$3.36	\$3.52
Kumho Tire Co.	South Korea	\$3.82	\$3.51
Cooper Tire & Rubber Co.	U.S.	\$4.20	\$3.44
Trelleborg AB	Sweden	N/L	\$3.31
Triangle Group Co.	China	\$2.53	\$2.73
Double Coin Holdings Ltd.	China	\$1.96	\$2.36
Apollo Tyres Ltd.	India	\$2.50	\$2.20
Titan International	U.S.	\$1.82	\$2.16
Nokian Tyres plc	Finland	\$2.13	\$2.10
MRF Ltd.	India	\$2.27	\$1.97
Shandong Linglong Rubber Co.	China	\$1.87	\$1.89
Nexen Tire Corp.	South Korea	\$1.54	\$1.58
Xingyuan Tyre Co.	China	\$1.56	\$1.57
Aeolus Tyre Co.	China	\$1.47	\$1.41

Dealer Channel Brand Marketshare

P-METRIC TIRES

(2013 RMA Replacement Shipments: 199.1 million. Shares rounded to nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.40%	Toyo	2.65%	Cordovan	1.50%
Michelin	8.85%	Multi-Mile	2.55%	Delta	1.40%
Firestone	8.15%	Kumho	2.45%	Nitto	1.35%
Bridgestone	7.75%	Uniroyal	2.25%	GT Radial	1.35%
BFGoodrich	4.65%	Falken	1.95%	Kelly	1.05%
Cooper	4.40%	Hercules	1.95%	Sailun	1.05%
General	3.45%	Dunlop	1.85%	Sumitomo	0.95%
Hankook	3.15%	Mastercraft	1.85%	Big O	0.85%
Yokohama	3.00%	Nexen	1.85%	Fuzion	0.75%
Continental	2.65%	Pirelli	1.60%	Others	9.40%

LT-METRIC TIRES

(2013 RMA Replacement Shipments: 28.4 million. Shares rounded to nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	11.20%	Continental	2.45%	Pirelli	1.60%
BFGoodrich	8.75%	Hankook	2.45%	Kelly	1.35%
Bridgestone	7.20%	Mastercraft	2.45%	Hercules	1.20%
Michelin	7.20%	Uniroyal	2.15%	Nexen	1.15%
Firestone	6.90%	Cordovan	2.10%	GT Radial	1.05%
Cooper	6.50%	Falken	2.00%	Big O	1.00%
General	5.10%	Kumho	1.75%	Maxxis	1.00%
Multi-Mile	5.10%	Dunlop	1.65%	Eldorado	0.75%
Yokohama	3.15%	Delta	1.60%	Laramie	0.65%
Toyo	3.10%			Others	7.45%

PERFORMANCE (H-RATED & ABOVE)

(2013 RMA Replacement Shipments: 63.7 million. Shares rounded to nearest 0.05%)

Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.80%	Dunlop	3.10%
Michelin	12.80%	Continental	2.90%
Bridgestone	8.90%	Cooper	2.40%
Yokohama	7.75%	General	1.90%
Falken	6.90%	Kelly	1.75%
BFGoodrich	6.50%	Nexen	1.65%
Kumho	6.25%	Nitto	1.65%
Toyo	5.25%	Sumitomo	1.15%
Firestone	4.55%	GT Radial	0.95%
Pirelli	3.65%	Others	2.60%
Hankook	3.50%		

(Source: TR Estimates)

TIRE MARKET PROFILE

Dealer Channel Brand Marketshare

MEDIUM TRUCK

(2013 RMA Replacement Shipments: 15.9 million.
Shares rounded to nearest 0.05%)

Brand	Dealer Share
Michelin	16.90%
Bridgestone	15.70%
Goodyear	12.05%
Yokohama	8.70%
Firestone	7.60%
Continental	4.50%
Hankook	3.90%
Double Coin	3.75%
Hercules	3.45%
General	2.75%
Cooper/Roadmaster	2.00%
Dunlop	2.00%
Toyo	2.00%
DynaTrak	2.00%
BFGoodrich	1.75%
Sailun	1.35%
Linglong	1.30%
Gladiator	1.25%
GT Radial	1.20%
Aeolus	1.10%
Kumho	1.00%
Sumitomo	1.00%
Triangle	1.00%
Others	2.00%

OTR

(2013 Industry Replacement Shipments:
190.35 thousand. Shares rounded to nearest 0.05%)

Brand	Bias Share	Radial Share
Bridgestone	9.35%	37.85%
Firestone	26.15%	--
Michelin	--	27.70%
Goodyear	29.15%	20.55%
General	18.00%	--
Titan	8.40%	1.15%
Double Coin	2.25%	3.40%
Others	6.70%	9.35%

(Source: RMA, TR Estimates)

AGRICULTURAL

(2013 Industry Replacement Shipments: 2.28 million.
Shares rounded to nearest 0.05%)

REAR TIRE SEGMENT

Brand	Bias Share	Radial Share
Firestone	32.70%	30.25%
BKT	24.75%	15.15%
Goodyear	12.55%	16.75%
Titan	12.30%	7.60%
Michelin	--	12.50%
Alliance	5.70%	5.65%
Harvest King	3.30%	--
Trelleborg	2.70%	2.10%
Others	6.00%	8.00%

FRONT/IMPLEMENT SEGMENT

Brand	Dealer Share
Firestone	30.20%
Goodyear	17.90%
Titan	15.70%
BKT	15.60%
American Farmer	5.55%
Universal Co-Op	5.40%
Alliance	3.10%
Trelleborg	2.15%
Others	4.40%

TIRE MARKET PROFILE

→ 2013 US. Tire Imports

P-METRIC TIRES

Country	2013	2012	2011	2012 Per Tire Value	2013 Per Tire Value
China	46.03	29.37	22.38	\$37.44	\$38.06
South Korea	16.99	20.32	19.52	\$63.93	\$59.46
Canada	11.11	11.21	12.46	\$72.01	\$70.61
Indonesia	10.82	9.80	10.23	\$45.43	\$42.24
Thailand	9.77	9.60	7.87	\$52.34	\$46.84
Mexico	9.77	9.52	9.12	\$58.98	\$58.71
Japan	8.29	9.07	13.14	\$82.81	\$80.26
Taiwan	6.95	5.70	5.04	\$37.63	\$34.73
Germany	3.46	3.16	3.48	\$101.47	\$109.63
Brazil	2.21	3.16	4.35	\$72.58	\$82.77
Others	18.32	7.64	7.52	\$134.98	\$72.36
TOTAL	143.71	126.50	120.65	\$60.39	\$54.47

LT-METRIC TIRES

Country	2013	2012	2011	2012 Per Tire Value	2013 Per Tire Value
Canada	9.51	9.45	8.75	\$86.43	\$82.76
China	5.30	3.00	2.95	\$67.86	\$64.81
South Korea	2.78	2.38	2.46	\$91.39	\$88.23
Japan	2.08	1.59	2.28	\$112.30	\$102.27
Thailand	1.21	1.49	1.48	\$98.04	\$91.20
Chile	1.12	0.14	N/A	\$96.28	\$72.19
Mexico	1.12	1.35	0.68	\$78.13	\$77.91
Vietnam	0.61	0.92	0.78	\$67.47	\$61.58
Indonesia	0.45	0.19	0.36	\$80.27	\$77.51
Taiwan	0.26	0.22	0.40	\$96.18	\$108.99
Others	0.32	0.31	0.46	\$116.24	\$149.92
TOTAL	24.73	21.03	20.60	\$86.30	\$81.01

MEDIUM TRUCK TIRES

Country	2013	2012	2011	2012 Per Tire Value	2013 Per Tire Value
China	6.25	6.33	4.86	\$163.19	\$141.27
Thailand	0.84	0.70	1.56	\$226.54	\$234.49
Canada	1.25	1.28	1.44	\$275.51	\$261.66
Japan	0.75	0.97	1.13	\$265.09	\$240.44
South Korea	0.21	0.30	0.23	\$277.43	\$248.61
United Kingdom	0.27	0.30	0.34	\$245.38	\$256.02
Germany	0.20	0.19	0.20	\$257.69	\$266.74
Spain	0.07	0.13	0.15	\$273.87	\$330.36
France	0.09	0.08	0.14	\$441.82	\$342.98
Italy	0.06	0.09	0.07	\$354.28	\$370.11
Others	0.17	0.18	0.16	\$256.23	\$208.93
TOTAL	10.15	10.59	10.29	\$204.62	\$184.31

(Millions of units. Source: U.S. Department of Commerce)

TIRE MARKET PROFILE

2013 US. Tire Shipments

P-METRIC (millions of units)		
Year	Replacement	OE
2009	189.52	24.60
2010	201.30	33.10
2011	194.40	35.70
2012	191.40	40.00
2013	199.10	43.60

WINTER (millions of units)		
Year	Replacement	OE
2009	8.80	0.70
2010	8.70	1.10
2011	9.50	1.00
2012	7.30	1.20
2013	6.20	1.00

LT-METRIC (millions of units)		
Year	Replacement	OE
2009	27.48	2.79
2010	29.10	3.60
2011	28.60	4.20
2012	28.10	4.20
2013	28.40	4.40

MEDIUM TRUCK (millions of units)			
Year	Replacement	OE	Retrads
2009	12.88	2.42	13.85
2010	15.80	3.20	14.72
2011	16.50	4.90	15.30
2012	15.80	5.10	14.80
2013	15.90	4.80	14.94

OTR (thousands of units)				
Year	Replacement		OE	
	Bias	Radial	Bias	Radial
2009	53.18	63.63	22.82	49.33
2010	84.51	111.49	29.67	64.13
2011	84.74	113.36	31.46	66.32
2012	79.62	109.42	34.71	70.26
2013	80.12	110.23	31.35	68.61

AG/FORESTRY (millions of units)				
Year	Replacement		OE	
	F	R	F	R
2009	1.3	0.63	0.38	0.55
2010	1.4	0.72	0.41	0.60
2011	1.5	0.74	0.44	0.65
2012	1.4	0.69	0.45	0.67
2013	1.5	0.78	0.47	0.73

(Source: RMA & TR Estimates)

2013 Top US. Tire Sizes

REPLACEMENT P-METRIC		
Rank	Size	Share
1	205/55R16	3.3%
2	215/60R16	2.8%
3	225/60R16	2.4%
4	P235/75R15	2.3%
5	P265/70R17	2.2%
6	195/65R15	2.2%
7	P215/60R16	2.0%
8	195/60R15	1.8%
9	215/65R16	1.8%
10	P225/60R16	1.7%

OE P-METRIC		
Rank	Size	Share
1	P215/55R17	6.1%
2	P265/70R17	4.0%
3	P275/55R20	3.2%
4	P275/65R18	3.1%
5	P215/60R16	3.1%
6	P205/65R16	2.8%
7	P275/60R20	2.5%
8	P235/65R17	2.3%
9	P205/55R16	2.3%
10	235/55R17	2.1%

REPLACEMENT LT-METRIC		
Rank	Size	Share
1	LT245/75R16	13.7%
2	LT265/75R16	11.0%
3	LT265/70R17	10.2%
4	LT225/75R16	8.0%
5	LT235/85R16	6.8%
6	LT285/75R16	4.3%
7	LT245/75R17	4.1%
8	31x10.50R15	3.8%
9	LT215/85R16	3.6%
10	LT285/70R17	3.5%

OE LT-METRIC		
Rank	Size	Share
1	LT245/75R17	21.9%
2	LT245/75R16	14.0%
3	LT225/75R16	11.3%
4	LT265/70R17	8.9%
5	LT265/70R18	8.1%
6	LT275/65R18	7.2%
7	LT275/70R18	6.1%
8	LT275/65R20	5.7%
9	LT235/80R17	4.6%
10	LT245/70R17	3.4%

REPLACEMENT MEDIUM TRUCK		
Rank	Size	Share
1	295/75R22.5	30.2%
2	11R22.5	22.7%
3	11R24.5	10.8%
4	225/70R19.5	5.7%
5	285/75R24.5	5.6%

OE MEDIUM TRUCK		
Rank	Size	Share
1	295/75R22.5	37.9%
2	11R22.5	27.7%
3	11R24.5	8.2%
4	225/70R19.5	6.3%
5	255/70R22.5	2.3%

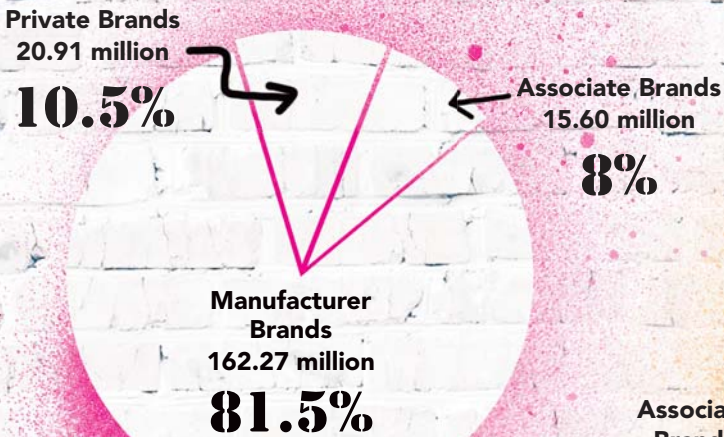
(Source: RMA)

TIRE MARKET PROFILE

2013 US. Brand-Type Shares

P-METRIC REPLACEMENT

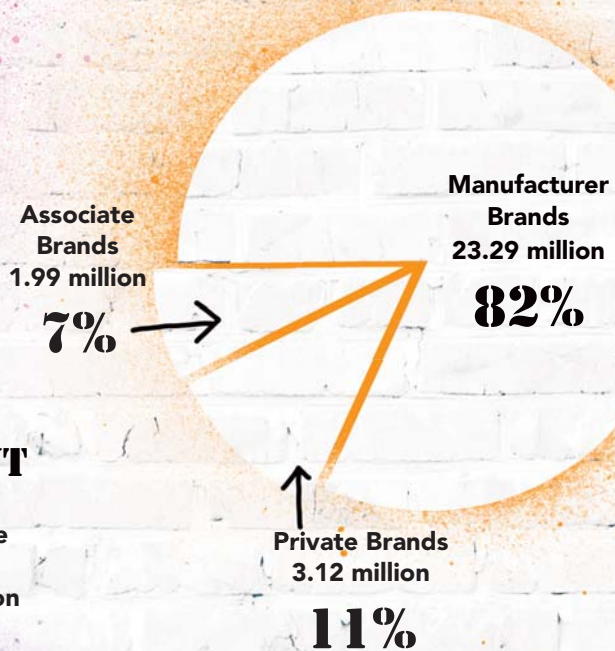
(199.1 million units shipped)



(Source: RMA)

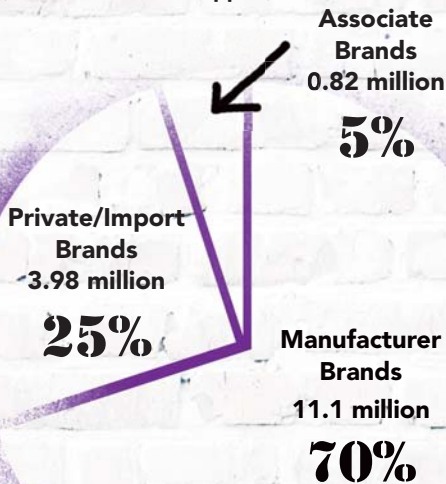
LT-METRIC REPLACEMENT

(28.4 million units shipped)



MEDIUM TRUCK REPLACEMENT

(15.9 million units shipped)



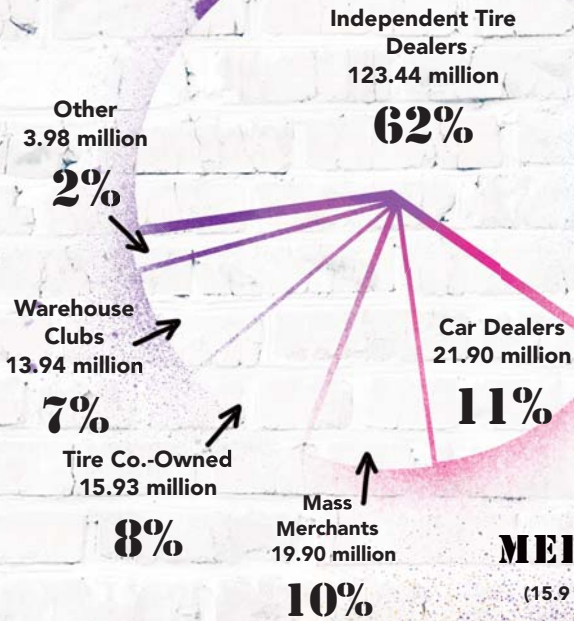
(Source: TR Estimates)

TIRE MARKET PROFILE

2013 US. Channel Shares

P-METRIC

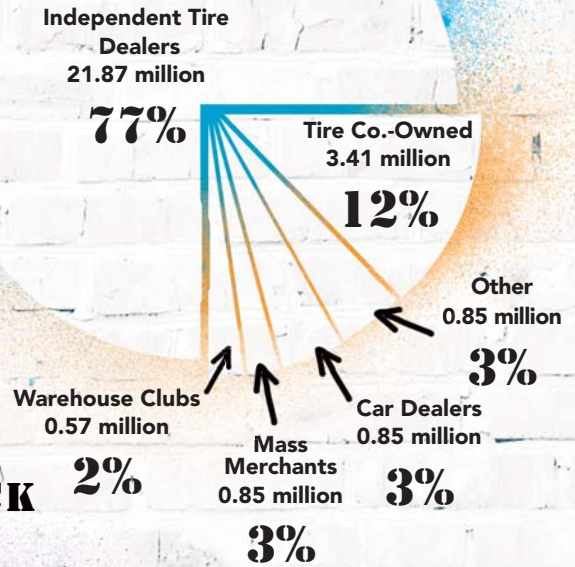
(199.1 millions of units shipped)



(Source: RMA)

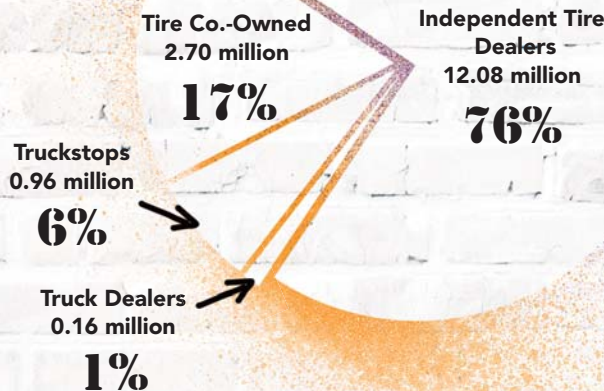
LT-METRIC

(28.4 millions of units shipped)



MEDIUM TRUCK

(15.9 millions of units shipped)



(Source: TR Estimates)

TIRE MARKET PROFILE

2013 Canada Tire Shipments

P-METRIC

(million of units)

Year	Replacement	OE
2009	19.22	6.00
2010	16.12	7.91
2011	15.91	8.40
2012	15.57	8.70
2013	15.72	8.80

LT-METRIC

(million of units)

Year	Replacement	OE
2009	2.75	0.10
2010	2.70	0.30
2011	2.87	0.31
2012	2.80	0.31
2013	2.77	0.32

WINTER

(million of units)

Year	Replacement
2009	7.55
2010	5.28
2011	4.93
2012	4.77
2013	4.53

(Source: Tire & Rubber Association of Canada and TR Estimates)

HIGH PERFORMANCE

(million of units)

Year	Replacement
2009	2.71
2010	3.11
2011	3.17
2012	3.23
2013	3.73

MEDIUM TRUCK

(million of units)

Year	Replacement	OE
2009	1.36	0.13
2010	1.40	0.15
2011	1.52	0.20
2012	1.57	0.21
2013	1.60	0.21

2013 Canada Brand-Type Shares

P-METRIC

15.72 million units shipped

Private Brands
1.57 million

10%

Associate Brands
1.57 million

10%

Manufacturer Brands
12.58 million

80%

LT-METRIC TRUCK

2.77 million units shipped

Manufacturer Brands
2.17 million

78%

Private Brands
0.30 million

11%

MEDIUM TRUCK

1.60 million units shipped

Manufacturer Brands
1.54 million

96%

Associate Brands
0.06 million

4%

TIRE MARKET PROFILE

Vehicle Registrations, Sales & Mileage

U.S. TOTAL REGISTRATIONS

(million of vehicles)

Year	Class		Class		Total Vehicles
	Cars	LT/SUVs	4-6 Trucks	7-8 Trucks	
2009	123.70	126.72	2.82	4.73	257.97
2010	121.81	126.05	2.46	4.11	254.43
2011	120.85	127.12	2.83	4.71	255.51
2012	119.85	128.87	2.80	4.70	256.22
2013	119.05	129.80	2.75	4.65	256.25

(Source: Auto Care Association)

CANADA TOTAL REGISTRATIONS

(million of vehicles)

Year	Class		Class		Total Vehicles
	Cars	LT/SUVs	4-6 Trucks	7-8 Trucks	
2009	12.33	8.24	0.26	0.60	21.43
2010	13.07	8.73	0.28	0.63	22.71
2011	12.99	8.86	0.27	0.65	22.77
2012	12.80	8.93	0.29	0.61	22.63
2013	12.70	8.97	0.29	0.63	22.59

(Source: Statistics Canada, TR Estimates)



U.S. NEW VEHICLE SALES

(million of units)

Year	Cars			LT/SUV			Trucks			Total Vehicles
	Domestic	Import	Total	Domestic	Import	Total	Class	Class	Total	
							4-6	7-8		
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
2011	1.99	4.10	6.09	3.89	2.66	6.55	0.10	0.22	0.32	12.96
2012	2.23	4.99	7.22	4.11	2.99	7.10	0.12	0.25	0.37	14.69
2013	2.41	5.14	7.55	4.50	3.32	7.82	0.14	0.25	0.39	15.76

(Source: Auto Care Association)

U.S. VEHICLE MILES

(in trillions)

Year	Miles
2008	2.973
2009	2.979
2010	2.970
2011	2.960
2012	2.950
2013	2.970

(Source: U.S. Dept. of Transportation)

AVERAGE AGE OF CONSUMER VEHICLES

Year	Light Trucks		All Light Vehicles
	Cars	Trucks	
2008	10.6	9.3	10.0
2009	10.8	9.8	10.3
2010	11.0	10.1	10.6
2011	11.1	10.4	10.8
2012	11.2	11.0	11.1
2013	11.3	11.2	11.3

(Source: Auto Care Association, R.L. Polk & Co.)

TIRE MARKET PROFILE

US. Top 10 Vehicle Sales

PASSENGER CARS

Brand/Model	2012	2013	% Change 12/13
Toyota-Camry	407,515	405,683	-0.4%
Honda Accord	328,396	365,816	11.4%
Honda Civic	315,793	336,180	6.5%
Nissan Altima	307,018	317,361	3.4%
Toyota Corolla	290,799	300,875	3.5%
Ford Fusion	243,226	293,208	20.5%
Chevrolet Cruze	235,859	247,013	4.7%
Ford Focus	244,756	236,000	-3.6%
Hyundai Elantra	167,870	203,488	21.2%
Hyundai Sonata	227,038	202,826	-10.7%
Top 10 Passenger Car Sales	2,768,270	2,908,450	5.1%
Total U.S. Passenger Car Sales	7,220,643	7,553,963	4.6%
Top 10 as % of Total	38.3%	38.5%	

LIGHT TRUCKS/SUVS

Brand/Model	2012	2013	% Change 12/13
Ford F-Series	600,081	709,624	18.3%
Chevrolet Silverado	415,399	476,015	14.6%
Dodge Ram Pickup	279,827	341,580	22.1%
Honda CR-V	280,403	303,550	8.3%
Ford Escape	261,902	295,266	12.7%
Chevrolet Equinox	217,519	237,084	9.0%
Toyota Rav4	171,722	215,066	25.2%
Ford Explorer	164,062	192,072	17.1%
GMC Sierra	155,786	182,479	17.1%
Jeep Grand Cherokee	154,731	173,316	12.0%
Top 10 Light Truck Sales	2,701,432	3,126,052	15.7%
Total U.S. Light Truck Sales	7,094,273	7,826,615	10.3%
Top 10 as % of Total	38.1%	39.9%	

(Source: Auto Care Association)

TIRE MARKET PROFILE

Canada Top 10 Vehicle Sales

PASSENGER CARS

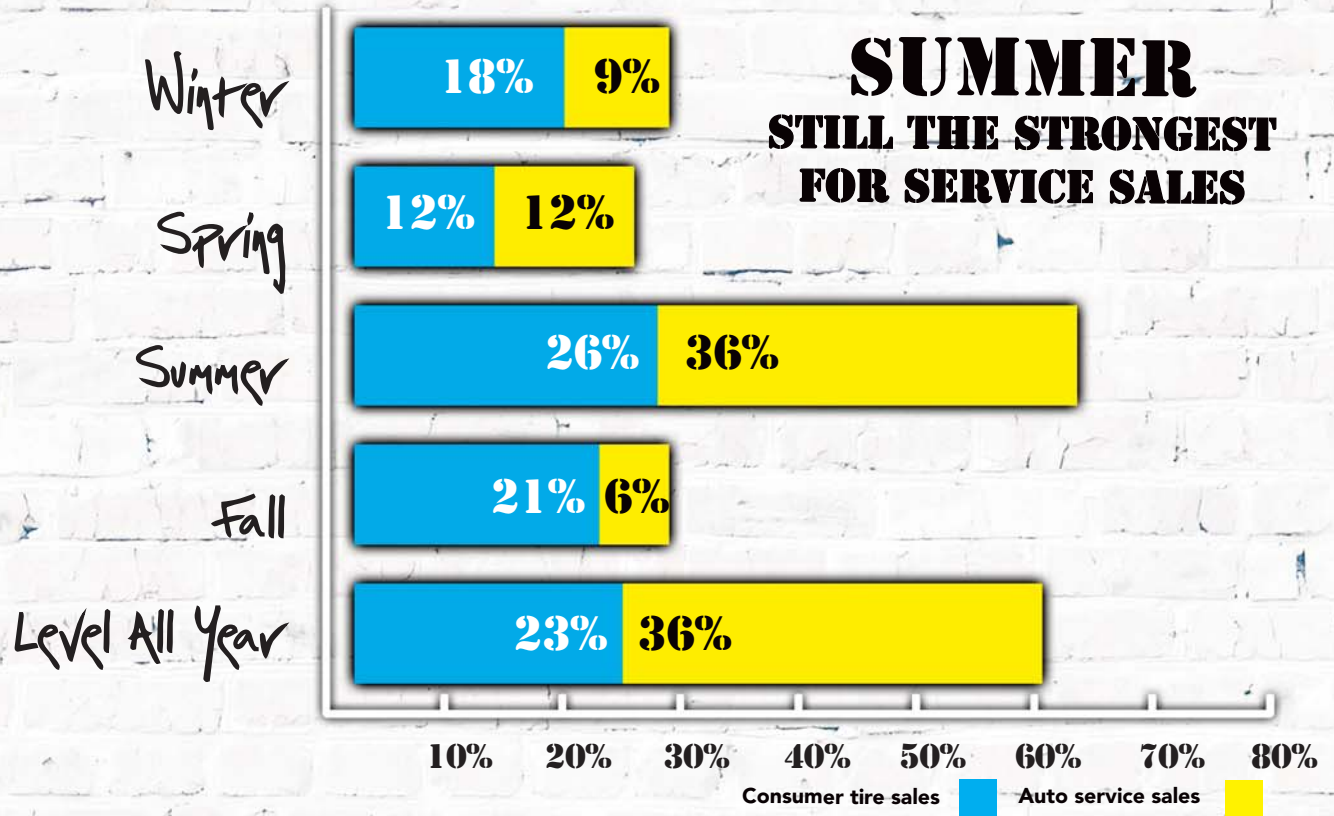
Brand/Model	2012	2013	% Change 12/13
Honda Civic	64,962	64,063	-1.40%
Hyundai Elantra	50,950	54,760	7.50%
Toyota Corolla	40,906	44,449	8.70%
Mazda Mazda3	39,295	40,466	3.00%
Chevrolet Cruze	32,628	33,184	1.70%
Volkswagen Jetta	26,904	30,413	13.0%
Ford Focus	27,936	25,781	-7.70%
Ford Fusion	16,698	20,145	20.6%
Hyundai Accent	22,581	18,884	-16.4%
Toyota Camry	18,203	18,245	0.20%
Top 10 Passenger Car Sales	341,063	350,390	2.7%
Total Canadian Passenger Car Sales	759,795	764,382	0.6%
Top 10 as % of Total	44.9%	45.8%	

LIGHT TRUCKS/SUVS

Brand/Model	2012	2013	% Change 12/13
Ford F-Series	106,358	122,325	15.0%
Dodge Ram Pickup	67,634	78,793	16.5%
GMC Sierra	42,712	46,908	9.80%
Dodge Caravan	51,552	46,732	-9.30%
Ford Escape	44,099	45,141	2.40%
Chevrolet Silverado	35,943	37,490	4.30%
Honda CR-V	33,339	34,481	3.40%
Toyota Rav4	25,942	33,156	27.8%
Dodge Journey	28,888	27,745	-4.00%
Hyundai Sante Fe	23,394	26,010	11.2%
Top 10 Light Truck Sales	459,861	498,781	8.5%
Total Canadian Light Truck Sales	915,880	978,730	6.9%
Top 10 as % of Total	50.2%	51.0%	

(Source: Auto Care Association)

TIRE MARKET PROFILE



WHERE DEALERS GET SERVICE PARTS

- 46.4%** Local parts jobber (NAPA, etc.)
- 22.2%** Local parts retailer (AutoZone, etc.)
- 15.6%** Warehouse parts dist.
- 9.4%** New car dealer (OE parts)
- 2.7%** Direct from manufacturer
- 2.1%** Tire company
- 0.6%** Order online
- 0.2%** Wagon jobber
- 0.7%** Other source

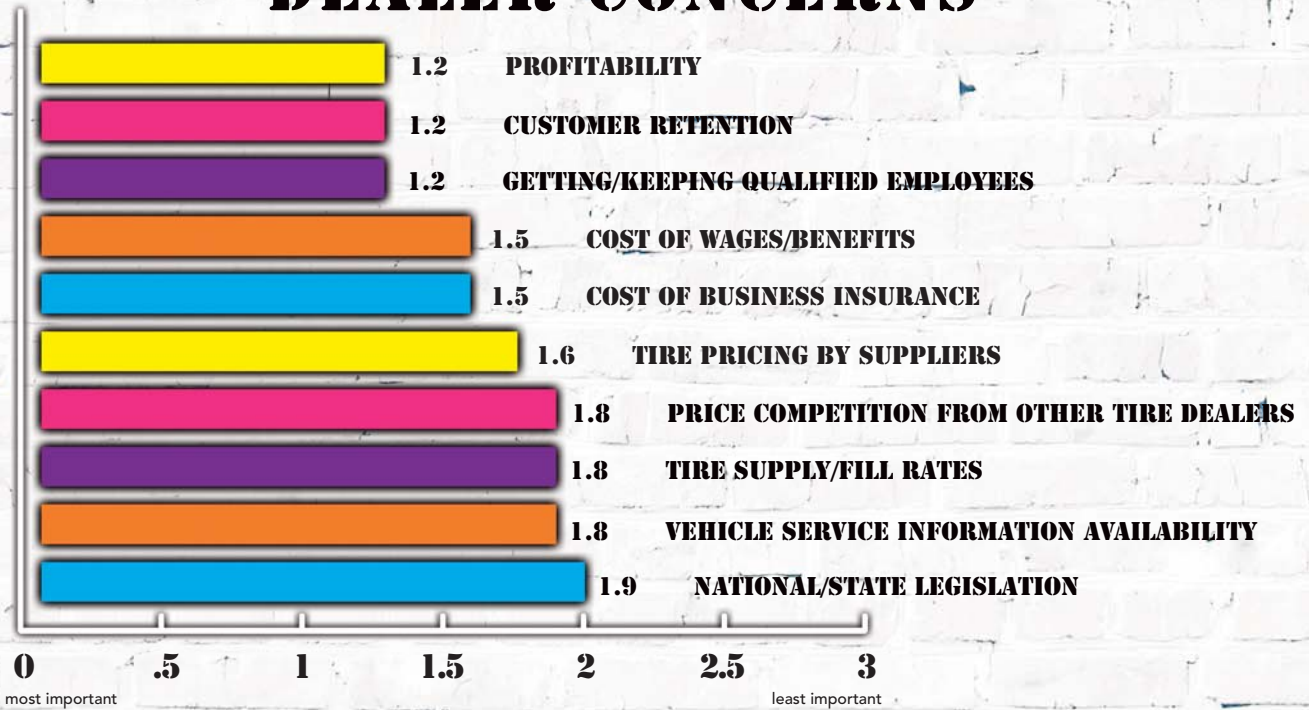
HYBRID VEHICLES BY STATE

(Registered vehicles)

State	2012	2013
California	483,741	718,256
Florida	105,928	156,442
New York	105,320	135,385
Texas	104,232	157,811
Virginia	79,925	103,199
Washington	77,007	105,960
Illinois	72,694	113,910
Pennsylvania	64,002	89,070
Massachusetts	62,550	79,623
All Other States	860,869	1,248,056
Total	2,016,268	2,907,712

TIRE MARKET PROFILE

TOP 10 TIRE DEALER CONCERNS



HOW DEALER INFLUENCES TIRE BUYER DECISIONS

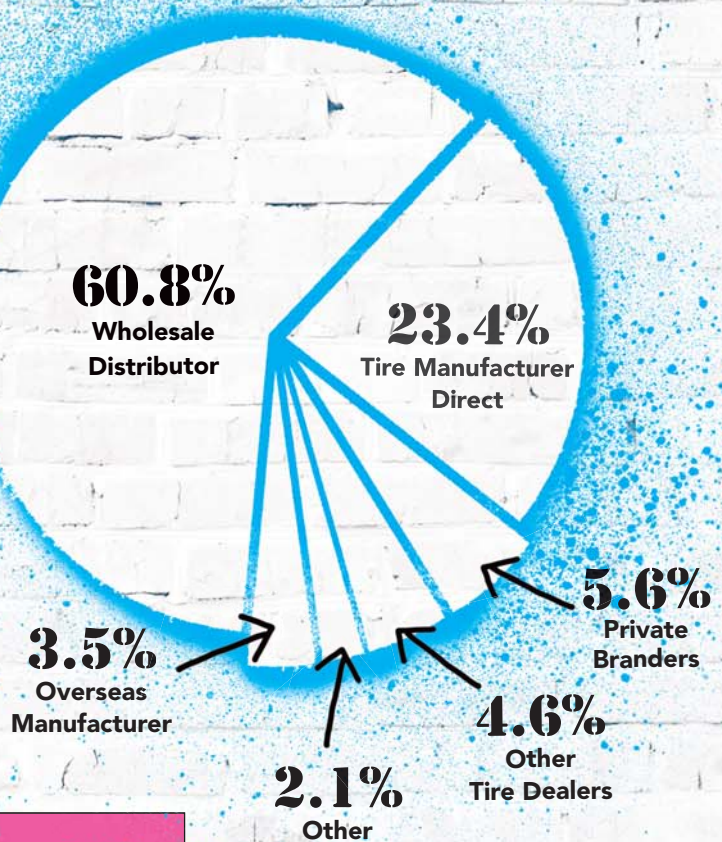
- 32.4%** Customers ask for a specific tire brand, and...
- 68.2%** Will listen to dealer recommendation, but...
- 10.3%** Won't switch at all
- 22.8%** Replace OE tire with exact same tire

TIRE MARKET PROFILE

What Commercial Dealers Sell

- 98%** Commercial LT (under 19.5)
- 92%** Medium Truck (19.5-24.5)
- 67%** Ag
- 64%** Heavy Truck (over 24.5)
- 59%** Specialty/Industrial
- 53%** OTR

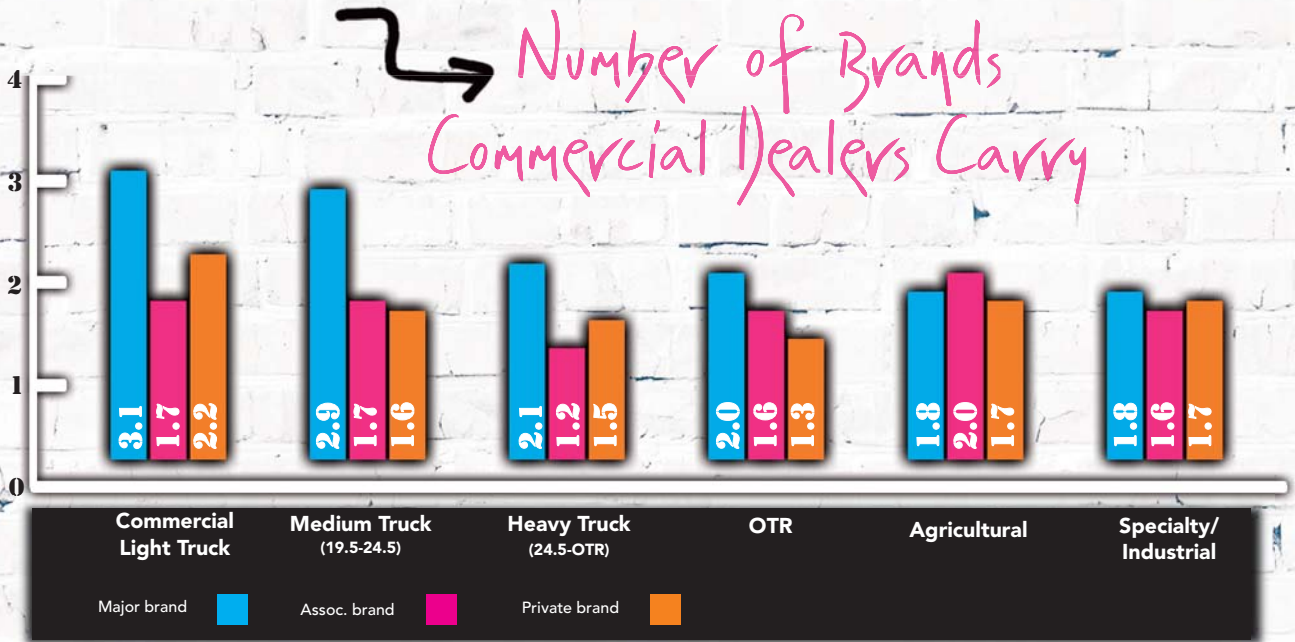
WHERE DEALERS GET CONSUMER TIRES



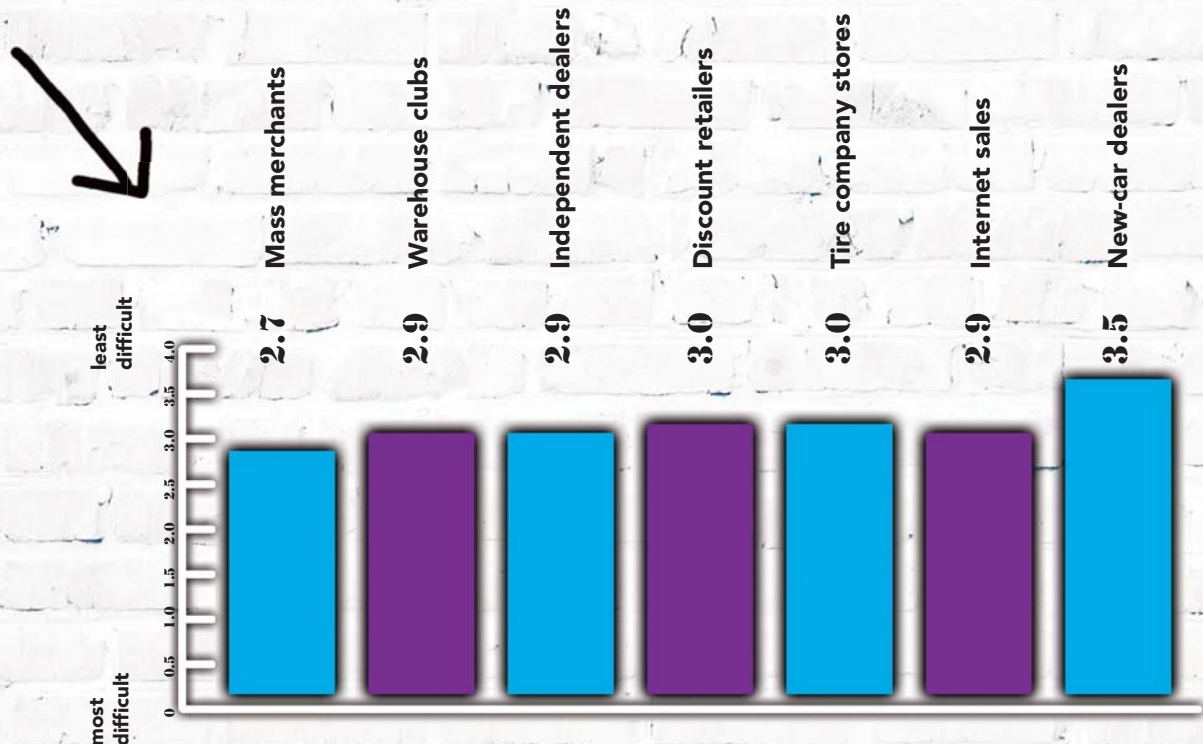
REPEAT CUSTOMERS IMPACT TIRE/SERVICE SALES

% of Dealers say repeat customers represent...	...% of monthly sales
68% of dealers	51%+ from repeat customers
16%	41%-50%
11%	31%-40%
3%	21%-31%
2%	11%-20%
1%	1%-10%

TIRE MARKET PROFILE



DEALER'S TOUGHEST COMPETITION



TIRE MARKET PROFILE

WHAT SERVICE EQUIPMENT DEALERS USE

(percentage owning or leasing)

96% Air compressor	84% Parts cleaner
96% Battery tester/charger	81% Engine diagnostic analyzer
95% Computerized tire/wheel balancer	80% Brake lathe: off-vehicle
91% TPMS reset/recalibrate tool	77% A/C refrigerant recycler
89% Above-ground lift	45% Brake lathe: on-vehicle
87% Alignment rack	43% Nitrogen inflation system
86% Tire changer: standard	41% Service truck
85% Tire changer: euro style	25% Tube benders



HOW DEALERS ADVERTISE/PROMOTE

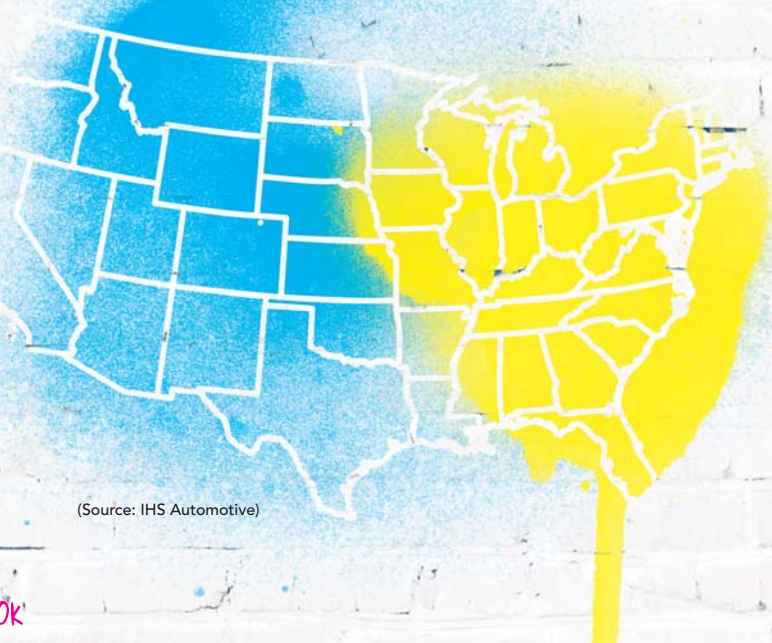
(2014 data, parentheses denote 2013 results, more than 100% due to multiple responses)

79% (75%) Word of mouth	35% (32%) Reminder cards
70% (69%) Website	30% (35%) Community service
54% (39%) Social media	26% (23%) Smartphone apps/mobile
43% (53%) Yellow Pages	20% (21%) Cable TV
42% (38%) Direct mail	18% (21%) Local TV
42% (43%) Radio ads	18% (22%) Field sales force
41% (43%) Newspaper ads	9% (7%) Telemarketing

TIRE MARKET PROFILE

Total New Consumer Vehicle Registrations By State

STATE	2012	2013	STATE	2012	2013
Alabama	188,539	199,834	North Carolina	373,885	402,078
Alaska	31,356	30,674	North Dakota	39,517	43,724
Arizona	291,890	349,453	Ohio	527,743	571,047
Arkansas	123,503	131,080	Oklahoma	718,900	699,406
California	1,529,238	1,711,762	Oregon	133,100	146,603
Colorado	227,307	247,544	Pennsylvania	598,274	622,088
Connecticut	158,128	169,999	Rhode Island	44,446	47,289
Delaware	43,929	47,840	South Carolina	175,888	197,635
D.C.	17,900	19,743	South Dakota	37,156	38,759
Florida	1,006,888	1,100,893	Tennessee	266,568	273,138
Georgia	399,515	435,464	Texas	1,275,909	1,423,625
Hawaii	60,543	67,482	Utah	107,013	116,124
Idaho	42,964	49,076	Vermont	35,578	39,043
Illinois	590,162	611,432	Virginia	378,916	375,262
Indiana	221,926	229,966	Washington	228,180	251,044
Iowa	127,396	133,825	West Virginia	83,036	84,117
Kansas	102,362	109,562	Wisconsin	217,599	233,680
Kentucky	137,288	139,681	Wyoming	26,047	26,606
Louisiana	209,337	220,987	Total U.S.	14,314,508	15,380,578
Maine	51,898	56,143			
Maryland	305,228	317,924			
Massachusetts	309,736	332,786			
Michigan	483,926	540,295			
Minnesota	232,160	245,719			
Mississippi	102,565	109,305			
Missouri	259,706	273,755			
Montana	54,796	58,129			
Nebraska	80,643	84,516			
Nevada	112,209	120,277			
New Hampshire	80,298	84,016			
New Jersey	513,551	545,613			
New Mexico	81,407	86,060			
New York	868,459	928,475			



(Source: IHS Automotive)

TIRE MARKET PROFILE

AVERAGE PRICE: REPLACEMENT PASSENGER RADIALS

(2013 most popular sizes: RMA)

Size	Major Brand	Import/Private Brand
195/65R15	\$99.83	\$68.77
205/55R16	\$109.91	\$78.91
215/60R16	\$115.28	\$75.14
215/65R16	\$122.48	\$82.98
225/60R16	\$115.80	\$78.64
195/60R15	\$97.63	\$67.02
P215/55R17	\$139.32	\$90.03
P215/60R16	\$115.84	\$79.36
P235/75R15	\$121.63	\$94.70
P265/70R17	\$170.27	\$125.36
P275/55R20	\$180.91	\$129.76
P275/65R18	\$212.39	\$167.23

[Prices averaged from actual phone calls by IntelliChek to independent tire dealers within 25 MSAs. Prices are for tires only.]

AVERAGE PRICE: REPLACEMENT LT RADIALS

(2013 most popular sizes: RMA)

Size	Major Brand	Import/Private Brand
31X10.5R15	\$161.65	\$127.20
LT215/85R16	\$166.10	\$124.10
LT225/75R16	\$144.90	\$111.35
LT235/85R16	\$165.61	\$126.49
LT245/75R16	\$156.88	\$119.20
LT245/75R17	\$193.12	\$144.34
LT265/70R17	\$178.84	\$133.47
LT265/75R16	\$178.22	\$129.92
LT285/70R17	\$227.76	\$185.06
LT285/75R16	\$222.95	\$168.08

[Prices averaged from actual phone calls by IntelliChek to independent tire dealers within 25 MSAs. Prices are for tires only.]

AVERAGE PRICE: REPLACEMENT MEDIUM TRUCK RADIALS

(2013 most popular sizes: RMA)


Size	Major Brand	Import/Private Brand
11R22.5	\$398.97	\$198.52
11R24.5	\$421.37	\$207.75
225/70R19.5	\$253.96	\$127.00
295/75R22.5	\$394.59	\$190.84
285/75R24.5	\$407.62	\$194.41
255/70R22.5	\$301.30	\$159.82
315/80R22.5	\$518.24	\$218.14
385/65R22.5	\$555.75	\$239.55
445/50R22.5	\$924.57	\$317.25
445/65R22.5	\$697.46	\$295.71
455/55R22.5	\$991.64	\$347.50

[Prices averaged from a survey of independent tire dealers nationwide. Prices are for tires only.]

TIRE MARKET PROFILE

SIZE OF THE U.S. AUTO CARE INDUSTRY

(billions of consumer dollars – *denotes forecast)



Year	Automotive	Medium and Heavy Duty	Total Auto Care Industry	YoY Change
2007	\$207.9	\$68.8	\$276.7	2.7%
2008	\$208.5	\$69.0	\$277.5	0.3%
2009	\$205.7	\$68.0	\$273.7	-1.4%
2010	\$213.3	\$70.6	\$283.9	3.7%
2011	\$223.4	\$73.9	\$297.3	4.7%
2012	\$231.2	\$76.5	\$307.7	3.5%
2013	\$238.4	\$78.8	\$317.2	3.1%
2014*	\$245.9	\$81.3	\$327.2	3.1%
2015*	\$254.0	\$84.0	\$338.0	3.3%

NOTES: Historical data have been revised. Figures do not include warranty work. SOURCE: Auto Care Association / AASA Channel Forecast Model

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