

# Tire Market Profile

Even if you've been in the tire industry for a mere 12 months, you've probably seen more movement and change and shifts than you thought were possible. 2014 was most definitely a year of massive change, which we've seen spill over into the current year.

With all of the shifts and changes and re-directions we've witnessed, it's hard for anyone to stay ahead of the game. To help steady the target, we've compiled this comprehensive Tire Market Profile data section.

Combining real-world data from a range of resources – including TIRE REVIEW's annual Tire Dealer Profile and research from key tire and vehicle service associations –

this section will help you gain a better perspective of our industry, help you see emerging trends, and prepare your business for the road ahead.

Through painstaking research, we've been able to assemble a collection of data that includes: the top 25 global tiremakers; tire import data; dealer channel brand marketshares; tire shipments by segment; a look at the OE and replacement high performance tire markets; 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. [TR](#)

## Top 25 Global Tire Manufacturers – 2015

Currency fluctuations and economic downturns around the globe impacted the year-to-year sales of the top tire producers. [Note: Sales figures are from 2014 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	2013	2014
<b>Continental AG</b>	Germany	\$43.16	\$45.55	\$41.94
<b>Bridgestone Corp.</b>	Japan	\$35.11	\$36.50	\$30.75
<b>Groupe Michelin</b>	France	\$28.31	\$26.90	\$23.77
<b>Goodyear Tire &amp; Rubber Co.</b>	U.S.	\$21.00	\$19.54	\$18.14
<b>Sumitomo Rubber Industries Ltd.</b>	Japan	\$9.36	\$7.99	\$7.01
<b>Pirelli &amp; C SpA</b>	Italy	\$8.01	\$8.46	\$7.31
<b>Hankook Tire Co.</b>	South Korea	\$6.60	\$6.81	\$6.08
<b>Yokohama Rubber Corp.</b>	Japan	\$6.47	\$5.91	\$5.22
<b>Giti Tire Pte. Ltd.</b>	Singapore	\$3.98	\$4.04	\$4.28
<b>Cheng Shin Rubber/Maxxis</b>	Taiwan	\$4.50	\$4.46	\$4.06
<b>Cooper Tire &amp; Rubber Co.</b>	U.S.	\$4.20	\$3.44	\$3.42
<b>Hangzhou Zhongce Rubber Co.</b>	China	\$3.88	\$3.96	\$3.29
<b>Toyo Tire &amp; Rubber Co.</b>	Japan	\$3.36	\$3.52	\$3.28
<b>Kumho Tire Co.</b>	South Korea	\$3.82	\$3.51	\$3.13
<b>Trelleborg AB</b>	Sweden	N/L	\$3.31	\$2.91
<b>Triangle Group Co.</b>	China	\$2.53	\$2.73	\$2.84
<b>Double Coin Holdings Ltd.</b>	China	\$1.96	\$2.36	\$2.39
<b>Apollo Tyres Ltd.</b>	India	\$2.50	\$2.20	\$2.04
<b>Nokian Tyres plc</b>	Finland	\$2.13	\$2.10	\$2.16
<b>MRF Ltd.</b>	India	\$2.27	\$1.97	\$2.10
<b>Titan International</b>	U.S.	\$1.82	\$2.16	\$1.90
<b>Shandong Linglong Rubber Co.</b>	China	\$1.87	\$1.89	\$1.66
<b>Nexen Tire Corp.</b>	South Korea	\$1.54	\$1.58	\$1.60
<b>Sailun Tires</b>	China	N/L	\$1.14	\$1.44
<b>Xingyuan Tyre Co.</b>	China	\$1.56	\$1.57	\$1.40

# Dealer Channel Brand Marketshare

## P-METRIC TIRES

2014 RMA Replacement Shipments: 206.5 million. Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	13.40%	Multi-Mile	2.55%	Cordovan	1.40%
Michelin	8.95%	Kumho	2.25%	Nitto	1.40%
Firestone	8.15%	Uniroyal	2.25%	Sailun	1.30%
Bridgestone	7.80%	Primewell	2.00%	Kelly	1.00%
BFGoodrich	4.60%	Falken	1.90%	Delta	0.95%
Cooper	4.50%	Hercules	1.90%	Sumitomo	0.95%
Hankook	3.55%	Nexen	1.90%	Big O	0.85%
General	3.35%	Mastercraft	1.85%	Fuzion	0.75%
Continental	3.00%	Dunlop	1.75%		
Yokohama	3.00%	Pirelli	1.70%		
Toyo	2.65%	GT Radial	1.55%	<b>Others</b>	<b>6.85%</b>

## LT-METRIC TIRES

2014 RMA Replacement Shipments: 28.7 million. Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	11.20%	Hankook	2.55%	Hercules	1.20%
BFGoodrich	8.70%	Mastercraft	2.50%	Nexen	1.15%
Michelin	7.20%	Uniroyal	2.15%	Maxxis	1.10%
Bridgestone	7.15%	Cordovan	2.00%	Primewell	1.05%
Firestone	6.95%	Falken	1.95%	Big O	0.95%
Cooper	6.55%	Kumho	1.70%		
General	5.05%	Dunlop	1.65%		
Multi-Mile	5.05%	Pirelli	1.60%		
Toyo	3.15%	Delta	1.45%		
Yokohama	3.10%	GT Radial	1.35%		
Continental	2.55%	Kelly	1.25%	<b>Others</b>	<b>7.75%</b>

## PERFORMANCE TIRES (H-RATED & ABOVE)

2014 RMA Replacement Shipments: 63.6 million. Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share %	Brand	Dealer Share
Goodyear	13.75%	Firestone	4.55%	Kelly	1.55%
Michelin	12.85%	Pirelli	3.65%	Nexen	1.55%
Bridgestone	8.90%	Hankook	3.60%	GT Radial	1.40%
Yokohama	7.75%	Continental	3.00%	Sailun	1.40%
Falken	6.80%	Dunlop	2.90%	Primewell	1.35%
BFGoodrich	6.45%	Cooper	2.40%		
Kumho	6.10%	General	1.85%		
Toyo	5.25%	Nitto	1.65%	<b>Others</b>	<b>6.85%</b>

# Dealer Channel Brand Marketshare

## MEDIUM TRUCK TIRES

2014 RMA Replacement Shipments: 17.4 million  
Shares Rounded to Nearest 0.05%

Brand	Dealer Share
Michelin.....	15.90%
Bridgestone .....	15.85%
Goodyear .....	10.05%
Yokohama .....	8.75%
Firestone .....	7.75%
Continental.....	4.80%
Double Coin .....	3.95%
Hankook .....	3.25%
Hercules.....	3.10%
General.....	3.10%
Cooper/Roadmaster .....	2.15%
Dynatrac .....	2.10%
Dunlop .....	1.90%
Toyo .....	1.90%
Aeolus.....	1.80%
BFGoodrich.....	1.80%
Sailun.....	1.80%
Linglong.....	1.40%
Gladiator .....	1.00%
GT Radial.....	1.00%
Samson.....	1.00%
Triangle.....	0.85%
Dayton.....	0.80%
Kelly .....	0.80%
Kumho .....	0.80%
Sumitomo .....	0.80%
<b>Others.....</b>	<b>2.60%</b>

## AGRICULTURAL TIRES

2014 Industry Replacement Shipments: 2.03 million  
Shares Rounded to Nearest 0.05%

### Rear tire segment

Brand	Bias Share	Radial Share
BKT.....	30.20%	19.65%
Firestone .....	28.90%	30.70%
Goodyear .....	11.50%	15.50%
Titan.....	10.50%	6.60%
Alliance.....	6.00%	5.85%
Harvest King .....	3.00%	--
Trelleborg .....	2.70%	2.10%
Michelin.....	--	13.55%
<b>Others.....</b>	<b>7.20%</b>	<b>6.05%</b>

### Front/Implement Segment

Brand	Dealer Share
Firestone .....	27.30%
Goodyear .....	17.40%
BKT.....	16.50%
Titan.....	15.15%
Carlisle.....	9.00%
Alliance.....	3.25%
American Farmer.....	3.10%
Harvest King .....	3.00%
Akuret .....	3.00%
Trelleborg .....	1.85%
<b>Others.....</b>	<b>0.45%</b>

## OTR TIRES

2014 Industry Replacement Shipments: 192.25 thousand. Shares Rounded to Nearest 0.05%

Brand	Bias Share	Radial Share
Goodyear .....	28.70%	20.35%
Firestone .....	25.85%	--
General.....	17.65%	--
Bridgestone .....	9.05%	37.85%
Titan.....	8.25%	1.10%
BKT.....	6.35%	3.00%
Double Coin .....	2.75%	3.75%
Michelin.....	--	27.75%
<b>Others.....</b>	<b>1.40%</b>	<b>6.20%</b>

# U.S. Tire Import Data

## P-METRIC TIRES

(millions of units)

COUNTRY	2014	2013	2012	2011	2014 PER TIRE VALUE	2013 PER TIRE VALUE
China	50.41	46.03	29.37	22.38	\$35.96	\$38.06
South Korea	15.78	16.99	20.32	19.52	\$59.48	\$59.46
Thailand	11.44	9.77	9.60	7.87	\$40.58	\$46.84
Indonesia	10.36	10.82	9.80	10.23	\$40.09	\$42.24
Canada	10.34	11.11	11.21	12.46	\$68.00	\$70.61
Mexico	9.77	9.77	9.52	9.12	\$58.61	\$58.71
Japan	7.97	8.29	9.07	13.14	\$73.97	\$80.26
Taiwan	6.97	6.95	5.70	5.04	\$34.02	\$34.73
Chile	5.79	N/A	N/A	N/A	\$55.64	N/A
Germany	3.54	3.46	3.16	3.48	\$101.58	\$109.63
Others	16.57	18.32	7.64	7.52	\$76.19	\$72.36
<b>TOTAL</b>	<b>148.93</b>	<b>143.71</b>	<b>126.50</b>	<b>120.65</b>	<b>\$51.55</b>	<b>\$54.47</b>

## LT-METRIC TIRES

(millions of units)

COUNTRY	2014	2013	2012	2011	2014 PER TIRE VALUE	2013 PER TIRE VALUE
Canada	9.18	9.51	9.45	8.75	\$74.51	\$82.76
China	6.35	5.30	3.00	2.95	\$62.53	\$64.81
South Korea	2.71	2.78	2.38	2.46	\$85.04	\$88.23
Japan	2.41	2.08	1.59	2.28	\$101.59	\$102.27
Thailand	1.06	1.21	1.49	1.48	\$86.49	\$91.20
Mexico	1.04	1.12	1.35	0.68	\$68.53	\$77.91
Chile	1.02	1.12	0.14	N/A	\$69.72	\$72.19
Vietnam	0.77	0.61	0.92	0.78	\$55.97	\$61.58
Indonesia	0.59	0.45	0.19	0.36	\$73.79	\$77.51
Taiwan	0.31	0.26	0.22	0.40	\$113.49	\$108.99
Others	0.48	0.32	0.31	0.46	\$99.16	\$149.92
<b>TOTAL</b>	<b>\$25.92</b>	<b>24.73</b>	<b>21.03</b>	<b>20.60</b>	<b>\$75.61</b>	<b>\$81.01</b>

## MEDIUM TRUCK TIRES

(millions of units)

COUNTRY	2014	2013	2012	2011	2014 PER TIRE VALUE	2013 PER TIRE VALUE
China	8.38	6.25	6.33	4.86	\$128.38	\$141.27
Canada	1.38	1.25	1.28	1.44	\$259.35	\$261.66
Japan	1.00	0.75	0.97	1.13	\$229.53	\$240.44
Thailand	0.84	0.84	0.70	1.56	\$232.56	\$234.49
United Kingdom	0.35	0.27	0.30	0.34	\$240.85	\$256.02
South Korea	0.27	0.21	0.30	0.23	\$229.93	\$248.61
Slovak Republic	0.27	N/A	N/A	N/A	\$278.17	N/A
Germany	0.25	0.20	0.19	0.20	\$251.15	\$266.74
Spain	0.13	0.07	0.13	0.15	\$310.23	\$330.36
France	0.11	0.09	0.08	0.14	\$278.52	\$342.98
Others	0.22	0.17	0.18	0.16	\$263.66	\$208.93
<b>TOTAL</b>	<b>13.21</b>	<b>10.15</b>	<b>10.59</b>	<b>10.29</b>	<b>\$172.16</b>	<b>\$184.31</b>

# 2014 U.S. Tire Shipments

## P-METRIC (millions of units)

Year	Replacement	OE
2010	201.30	33.10
2011	194.40	35.70
2012	191.40	40.00
2013	199.30	43.60
2014	206.50	47.79

## LT-METRIC (millions of units)

Year	Replacement	OE
2010	29.10	3.60
2011	28.60	4.20
2012	28.10	4.20
2013	28.00	4.40
2014	28.68	4.63

## WINTER (millions of units)

Year	Replacement	OE
2010	8.70	1.10
2011	9.50	1.00
2012	7.30	1.20
2013	6.20	1.00
2014	7.40	1.10

## 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
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
2014	1.3	0.78	0.42	0.70

## MEDIUM TRUCK (millions of units)

Year	Replacement	OE	Retreads
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	15.73	4.81	14.94
2014	17.43	5.69	15.20

(Source: RMA and TR Estimates)

# 2014 Top U.S. Tire Sizes

## REPLACEMENT P-METRIC

Rank	Size	Share
1	205/55R16	3.8%
2	215/60R16	3.1%
3	195/65R15	2.5%
4	225/60R16	2.3%
5	P265/70R17	2.1%
6	P235/75R15	2.1%
7	225/65R17	1.9%
8	195/60R15	1.8%
9	215/55R17	1.7%
10	225/50R17	1.7%

## OE P-METRIC

Rank	Size	Share
1	P215/55R17	5.0%
2	P215/60R16	3.4%
3	215/55R17	2.7%
4	P265/70R17	2.7%
5	P275/65R18	2.6%
6	225/65R17	2.6%
7	P205/55R16	2.6%
8	P275/60R20	2.5%
9	P195/65R15	2.4%
10	P275/55R20	2.3%

## REPLACEMENT LT-METRIC

Rank	Size	Share
1	LT245/75R16	13.1%
2	LT265/70R17	10.4%
3	LT265/75R16	10.3%
4	LT225/75R16	8.4%
5	LT235/85R16	6.3%
6	LT245/75R17	4.4%
7	LT285/75R16	4.1%
8	LT285/70R17	3.7%
9	LT275/70R18	3.4%
10	31X10.50R15	3.4%

## OE LT-METRIC

Rank	Size	Share
1	LT245/75R17	21.7%
2	LT245/75R16	12.0%
3	LT225/75R16	11.4%
4	LT265/70R18	10.3%
5	LT275/65R18	7.8%
6	LT265/70R17	7.0%
7	LT275/70R18	6.1%
8	LT235/80R17	4.9%
9	LT255/75R17	4.7%
10	LT275/65R20	4.6%

## REPLACEMENT MEDIUM TRUCK

Rank	Size	Share
1	295/75R22.5	28.9%
2	11R22.5	22.2%
3	11R24.5	11.2%
4	225/70R19.5	7.1%
5	255/70R22.5	5.0%

## OE MEDIUM TRUCK

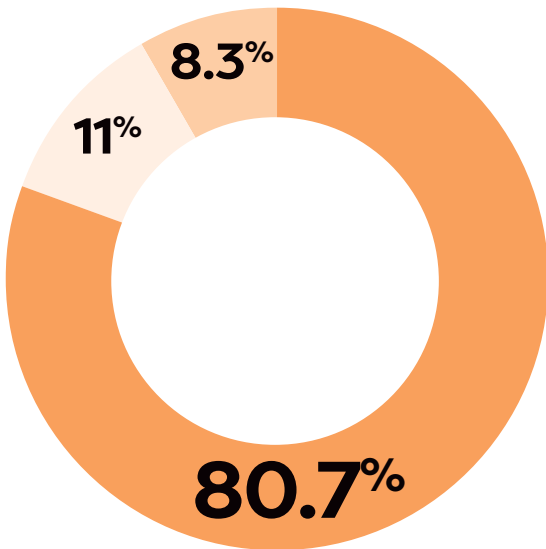
Rank	Size	Share
1	295/75R22.5	39.7%
2	11R22.5	26.9%
3	11R24.5	8.9%
4	225/70R19.5	6.1%
5	255/70R22.5	2.8%

(Source: RMA)

# 2014 U.S. Brand-Type Shares

## P-METRIC REPLACEMENT

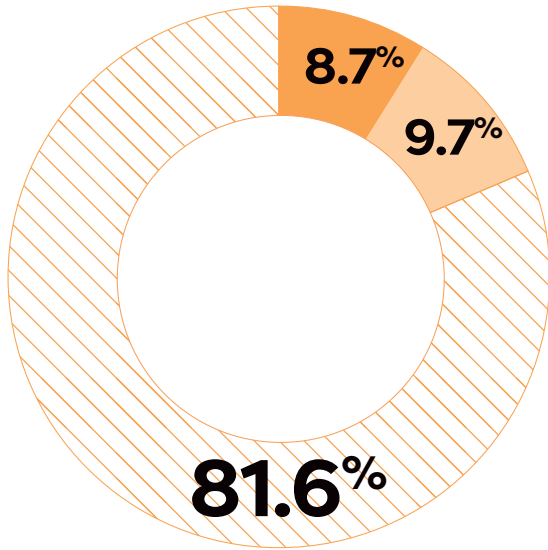
(206.50 million units shipped)



- Associate Brands | 22.72 million
- Private Brands | 17.14 million
- Manufacturer Brands | 166.65 million

## LT-METRIC REPLACEMENT

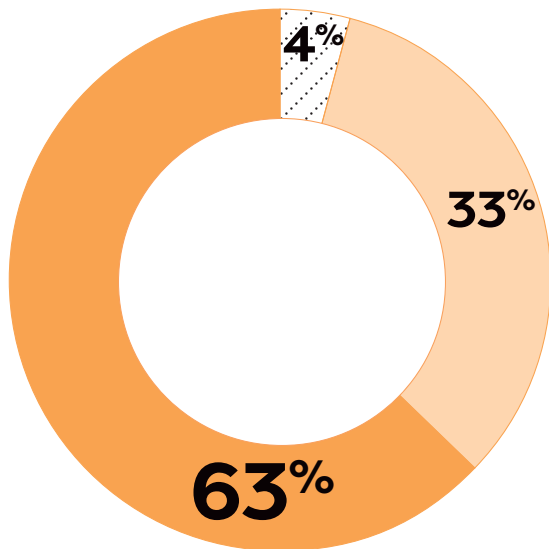
(28.68 million units shipped)



- Associate Brands | 2.50 million
- Private Brands | 2.78 million
- Manufacturer Brands | 23.40 million

## MEDIUM TRUCK REPLACEMENT

(17.43 million units shipped)



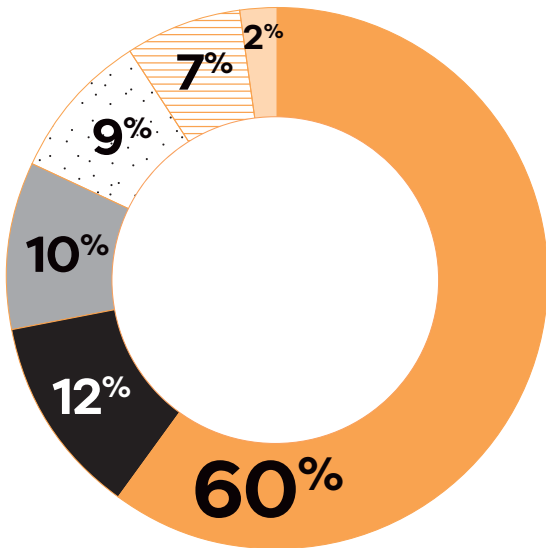
- Associate Brands | 0.70 million
- Private Brands | 5.75 million
- Manufacturer Brands | 10.98 million

(Source: TR Estimates)

# 2014 U.S. Channel Shares

## P-METRIC

(206.50 million units shipped)

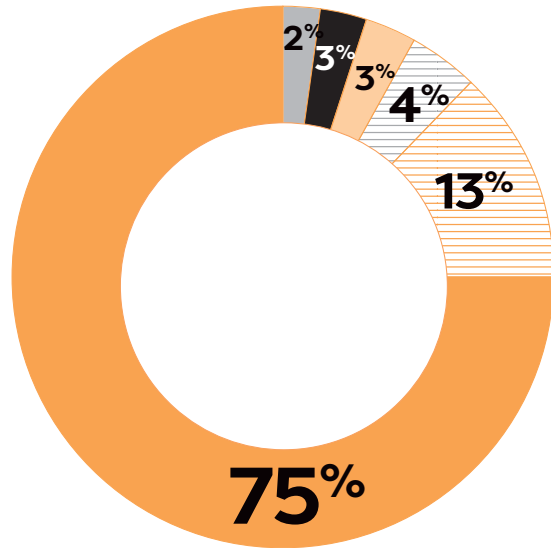


- Independent Tire Dealers | 123.9 million
- Car Dealers | 24.8 million
- Mass Merchants | 20.65 million
- Tire Co. - Owned | 18.56 million
- Warehouse Clubs | 14.46 million
- Other | 4.13 million

- Independent Tire Dealers | 13.25 million
- Tire Co. Owned | 2.96 million
- Truck Stops | 1.05 million
- Truck Dealers | 0.17 million

## LT-METRIC

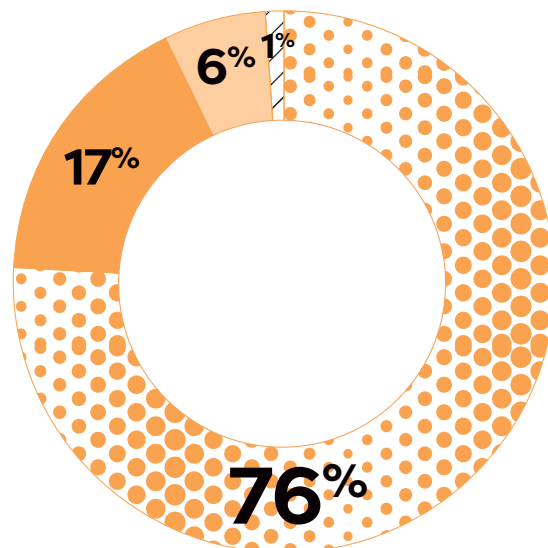
(28.68 million units shipped)



- Independent Tire Dealers | 21.51 million
- Tire Co. - Owned | 3.73 million
- Car Dealers | 1.15 million
- Mass Merchants | 0.86 million
- Other | 0.86 million
- Warehouse Clubs | 0.57 million

## MEDIUM TRUCK

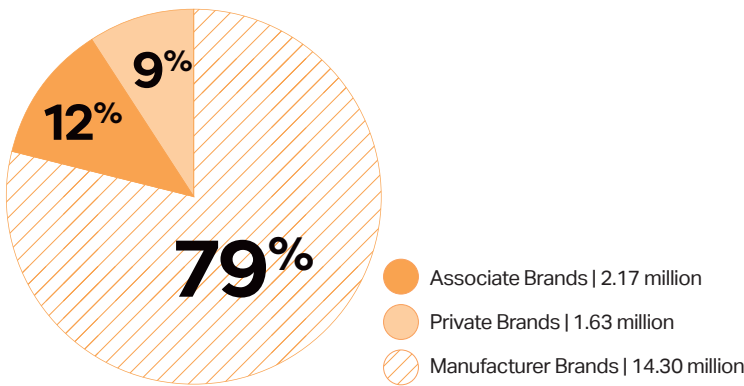
(17.43 million units shipped)



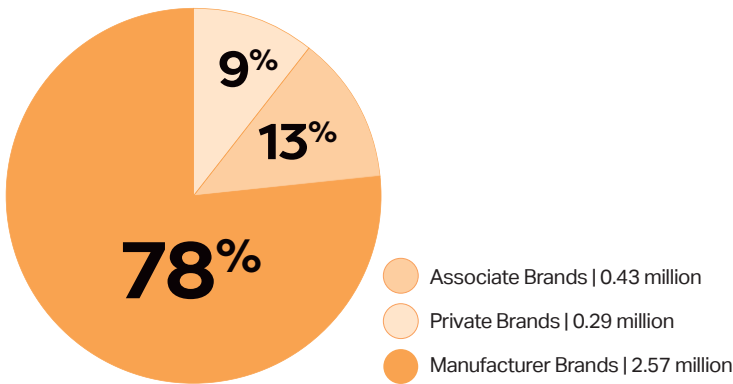
(Source: RMA, TR Estimates)

# 2014 Canada Brand-Type Shares

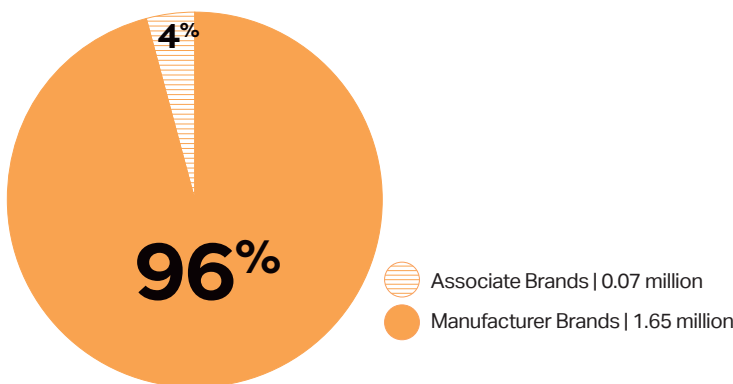
**P-METRIC** (18.10 million units shipped)



**LT-METRIC** (3.29 million units shipped)



**MEDIUM TRUCK** (1.72 million units shipped)



# 2014 Canada Tire Shipments

**P-METRIC** (millions of units)

Year	Replacement	OE
2010	16.12	7.91
2011	15.91	8.40
2012	15.57	8.70
2013	15.72	8.80
2014	18.10	9.01

**LT-METRIC** (millions of units)

Year	Replacement	OE
2010	2.70	0.30
2011	2.87	0.31
2012	2.80	0.31
2013	2.77	0.32
2014	3.29	0.34

**MEDIUM TRUCK** (millions of units)

Year	Replacement	OE
2010	1.40	0.15
2011	1.52	0.20
2012	1.57	0.21
2013	1.60	0.21
2014	1.72	0.22

**WINTER** (millions of units)

Year	Replacement
2010	5.28
2011	4.93
2012	4.77
2013	4.53
2014	6.33

**HIGH PERFORMANCE** (millions of units)

Year	Replacement
2010	3.11
2011	3.17
2012	3.23
2013	3.73
2014	3.83

(Source: TRAC, TR Estimates)



# Vehicle Registration, Sales & Mileage

## U.S. TOTAL REGISTRATIONS

(million of vehicles)

Year	Cars	LT/SUVs	Class 4-6 Trucks	Class 7-8 Trucks	Total Vehicles
2010	122.45	126.98	2.85	4.81	257.10
2011	121.37	128.10	2.49	4.18	256.10
2012	119.53	129.18	2.86	4.81	256.41
2013	118.25	130.22	2.85	4.99	256.68
2014	119.63	132.97	2.62	4.49	259.72

(Source: Auto Care Association)

## U.S. NEW VEHICLE REGISTRATIONS

(in millions)

### CARS

Year	Domestic	Import	Total
2010	1.80	3.75	5.64
2011	1.99	3.99	5.99
2012	2.23	4.87	7.10
2013	2.41	5.02	7.43
2014	2.35	5.20	7.55

### LT/SUVS

Year	Domestic	Import	Total
2010	3.37	2.55	5.93
2011	3.90	2.76	6.66
2012	4.10	3.10	7.21
2013	4.50	3.44	7.94
2014	4.98	3.81	8.80

### TRUCKS

Year	Class 4-6	Class 7-8	Total
2010	.08	.16	.24
2011	.10	.21	.32
2012	.12	.25	.37
2013	.13	.24	.38
2014	.15	.28	.43

### TOTAL VEHICLES:

Year	Total
2010	11.81
2011	12.98
2012	14.68
2013	15.76
2014	16.79

(Source: Auto Care Association)

## U.S. VEHICLE MILES DRIVEN

(in trillions of miles traveled)

Year	Miles
2009	2.979
2010	2.970
2011	2.960
2012	2.950
2013	2.970
2014	3.040

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

## AVERAGE AGE OF CONSUMER VEHICLES

(in years)

Year	Cars	Light Trucks	All Light Vehicles
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
2014	11.4	11.4	11.4

(Source: Auto Care Association, IHS Automotive)

# Vehicle Registration, Sales & Mileage

## U.S. TOP 10 PASSENGER CAR SALES

(Based on 2014 C-Y New Registrations)

Make/Model	2013	2014	YoY Change
Toyota Camry	405,739	429,606	5.9%
Honda Accord	365,850	389,496	6.5%
Toyota Corolla	300,905	337,571	12.2%
Nissan Altima	317,391	332,887	4.9%
Honda Civic	336,219	326,669	-2.8%
Ford Fusion	293,247	307,214	4.8%
Chevrolet Cruze	247,048	270,463	9.5%
Ford Focus	236,037	223,301	-5.4%
Hyundai Sonata	202,850	213,36	5.2%
Hyundai Elantra Sedan	203,495	190,800	-6.2%
<b>Top 10 Passenger Car Sales</b>	<b>2,908,781</b>	<b>3,021,369</b>	<b>3.9%</b>
<b>Total Passenger Car Sales</b>	<b>7,436,614</b>	<b>7,554,528</b>	<b>1.6%</b>
<b>Top 10 as a Percent of Total Sales</b>	<b>39.1%</b>	<b>40.0%</b>	

## U.S. TOP 10 LIGHT TRUCK SALES

(Based on 2014 C-Y New Registrations)

Make/Model	2013	2014	YoY Change
Ford F-Series	709,711	700,099	-1.4%
Chevrolet Silverado	476,081	523,813	10.0%
Dodge Ram	341,630	422,924	23.8%
Honda CR-V	303,594	335,146	10.4%
Ford Escape	295,324	308,079	4.3%
Toyota Rav4	215,099	266,148	23.7%
Chevrolet Equinox	237,135	238,245	0.5%
Gmc Sierra	182,498	211,863	16.1%
Ford Explorer	192,092	210,840	9.8%
Jeep Grand Cherokee	173,339	184,346	6.3%
<b>Top 10 Light Truck Sales Total</b>	<b>3,126,503</b>	<b>3,401,503</b>	<b>8.8%</b>
<b>Total Light Truck Sales</b>	<b>7,947,037</b>	<b>8,801,526</b>	<b>10.8%</b>
<b>Top 10 as a Percent of Total Sales</b>	<b>39.3%</b>	<b>38.6%</b>	

(Source: Auto Care Association)

# Vehicle Registration, Sales & Mileage

## CANADA TOTAL VEHICLE REGISTRATIONS

(million of vehicles)

Year	Cars Trucks	LT/SUVs Trucks	Class 4-6 Vehicles	Class 7-8	Total
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
2013	12.63	9.10	0.52	0.87	23.12

## TOP 10 CANADIAN PASSENGER CAR SALES

(Based on 2014 CY Sales Rank)

Make/Model	2013	2014	YoY Change
Honda Civic	64,063	66,057	3.1%
Hyundai Elantra	54,760	50,420	-7.9%
Toyota Corolla	44,449	48,881	10.0%
Mazda Mazda3	40,466	40,974	1.3%
Chevrolet Cruze	33,184	34,421	3.7%
Volkswagen Jetta	30,413	31,042	2.1%
Hyundai Accent	25,781	23,173	-10.1%
Ford Focus	20,145	22,392	11.2%
Ford Fusion	18,884	18,472	-2.2%
Honda Accord	18,245	16,962	-7.0%
<b>Top 10 Passenger Car Sales Total</b>	<b>350,390</b>	<b>352,794</b>	<b>0.7%</b>
<b>Total Passenger Car Sales</b>	<b>764,382</b>	<b>763,792</b>	<b>-0.1%</b>
<b>Top 10 as Percent of Total Sales</b>	<b>45.8%</b>	<b>46.2%</b>	

## TOP 10 CANADIAN LIGHT TRUCK SALES

(Based on 2014 CY Sales Rank)

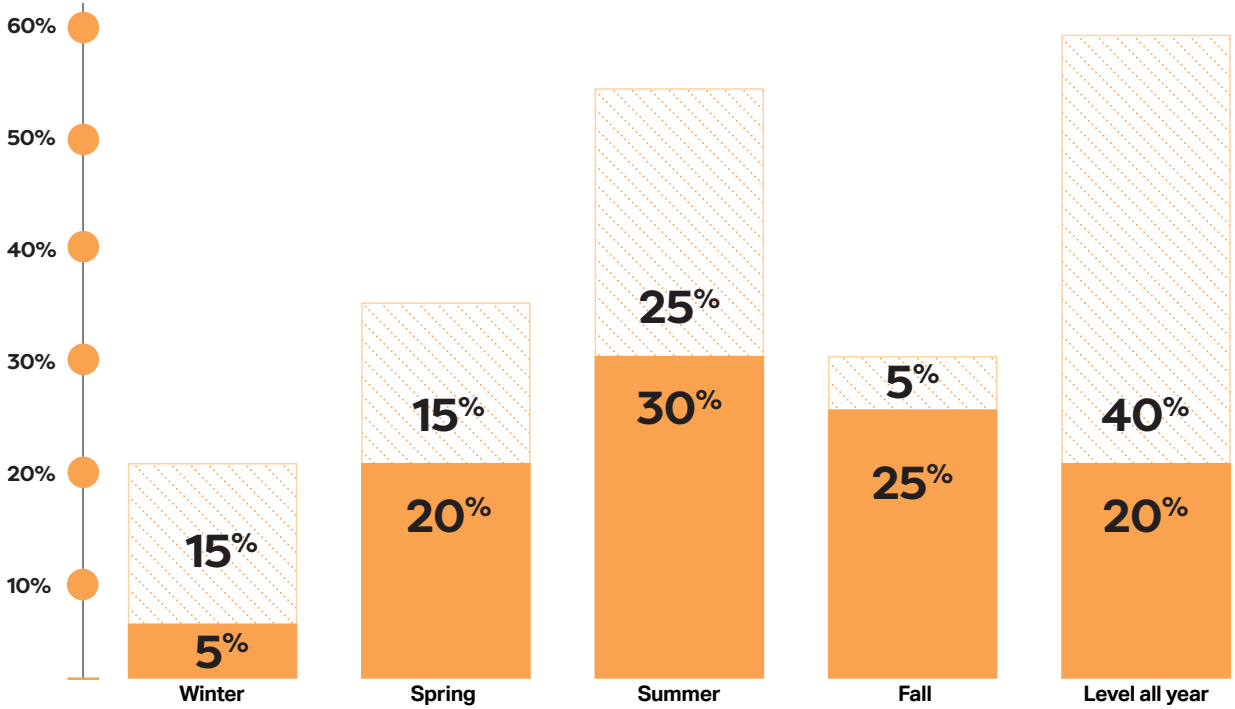
Make/Model	2013	2014	YoY Change
Ford F-Series	122,325	126,277	3.2%
Ram Pickup	78,793	88,521	12.3%
Ford Escape	46,908	52,198	11.3%
Dodge Caravan	46,732	51,759	10.8%
GMC Sierra	45,141	48,046	6.4%
Chevrolet Silverado	37,490	41,959	11.9%
Honda CR-V	34,481	37,684	9.3%
Toyota RAV4	33,156	36,639	10.5%
Nissan Rogue	27,745	28,827	3.9%
Hyundai Santa Fe Sport	26,010	27,580	6.0%
<b>Top 10 Light Truck Sales Total</b>	<b>498,781</b>	<b>539,490</b>	<b>8.2%</b>
<b>Total Light Truck Sales</b>	<b>980,185</b>	<b>1,087,581</b>	<b>11.0%</b>
<b>Top 10 as Percent of Total Sales</b>	<b>50.9%</b>	<b>49.6%</b>	

(Source: Auto Care Association)

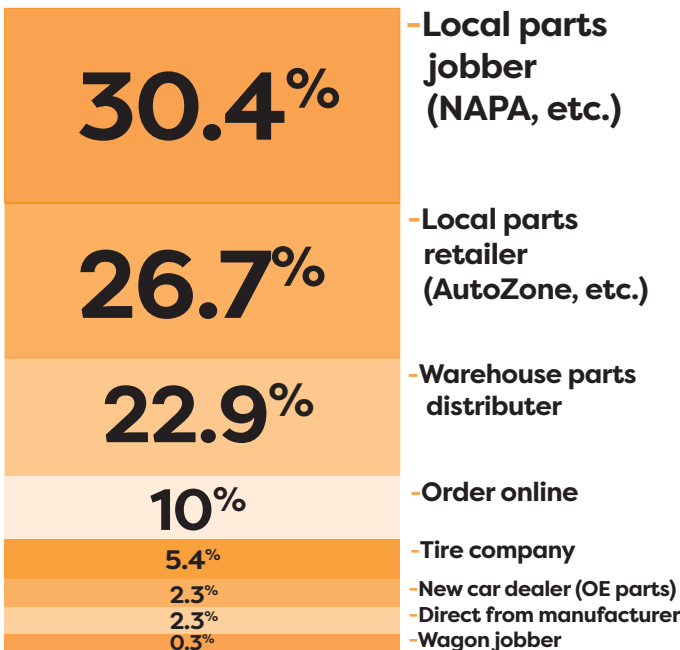
# Summer

Still the Strongest For Service Sales

- Consumer Tire Sales
- Auto Service Sales



## Where Dealers Get Service Parts



## Hybrid Vehicle Sales By State

(registered vehicles)

State	2014	2013
California	854,250	718,256
Florida	186,489	156,442
Texas	185,489	157,811
New York	161,105	135,385
Illinois	130,900	113,910
Washington	124,005	105,960
Virginia	117,283	103,199
Pennsylvania	104,843	89,070
Massachusetts	91,498	79,623
All Other States	1,409,358	1,248,056
<b>TOTAL</b>	<b>3,365,220</b>	<b>2,907,712</b>

## Top 10 Tire Dealer Concerns



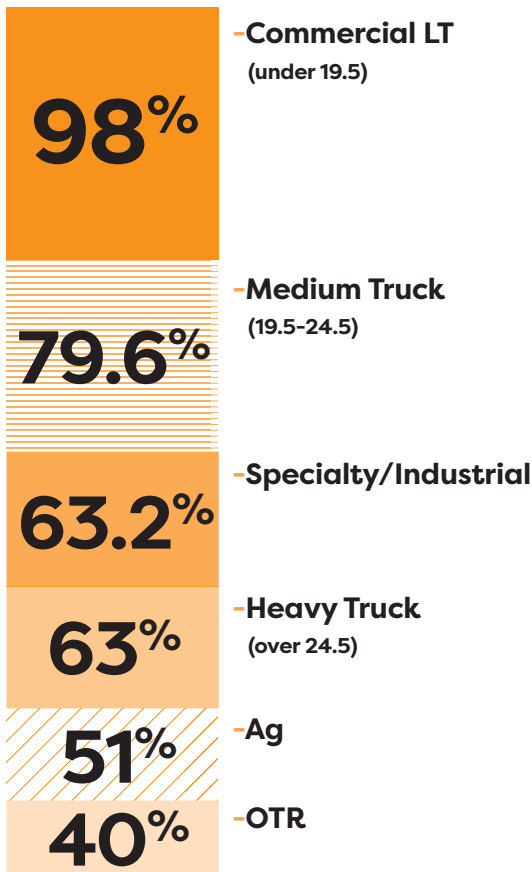
## How Dealers Influence Tire Buyer Decisions

**50.3%** Customers ask for a specific tire brand, and...

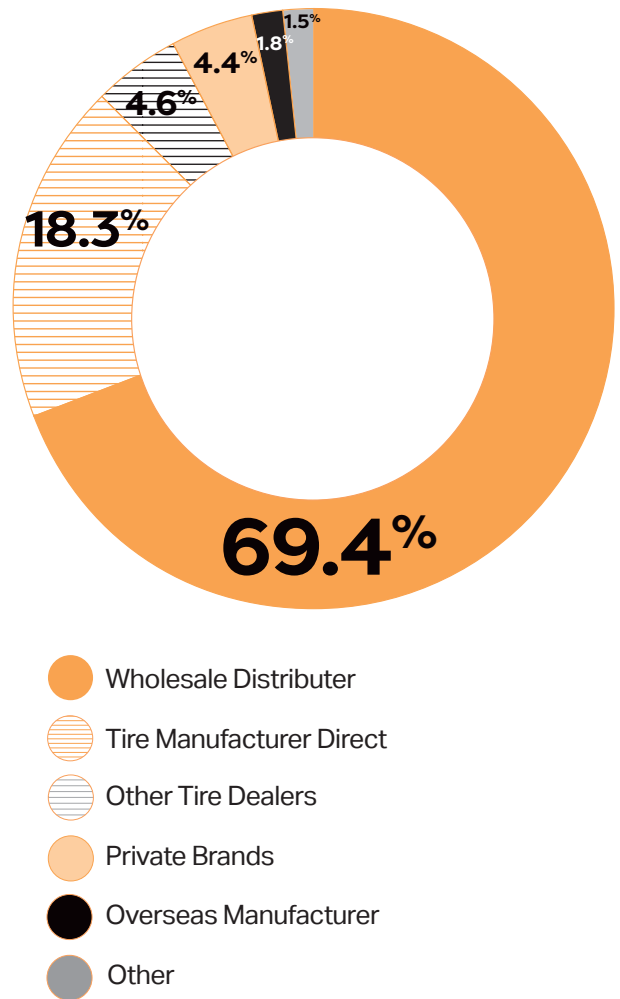
**64.0%** Will follow tire dealer recommendation, but...

**24.0%** Replace OE tire with exact same tire

## What Commercial Dealers Sell

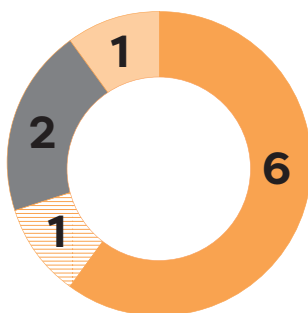


## Where Dealers Get Consumer Tires

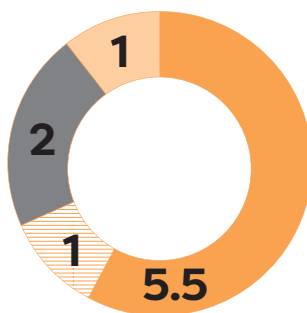


## Number of Tire Brands Retail Dealers Carry

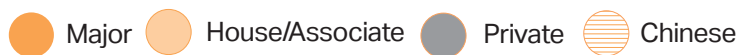
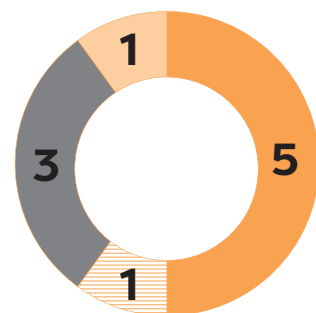
Standard Passenger



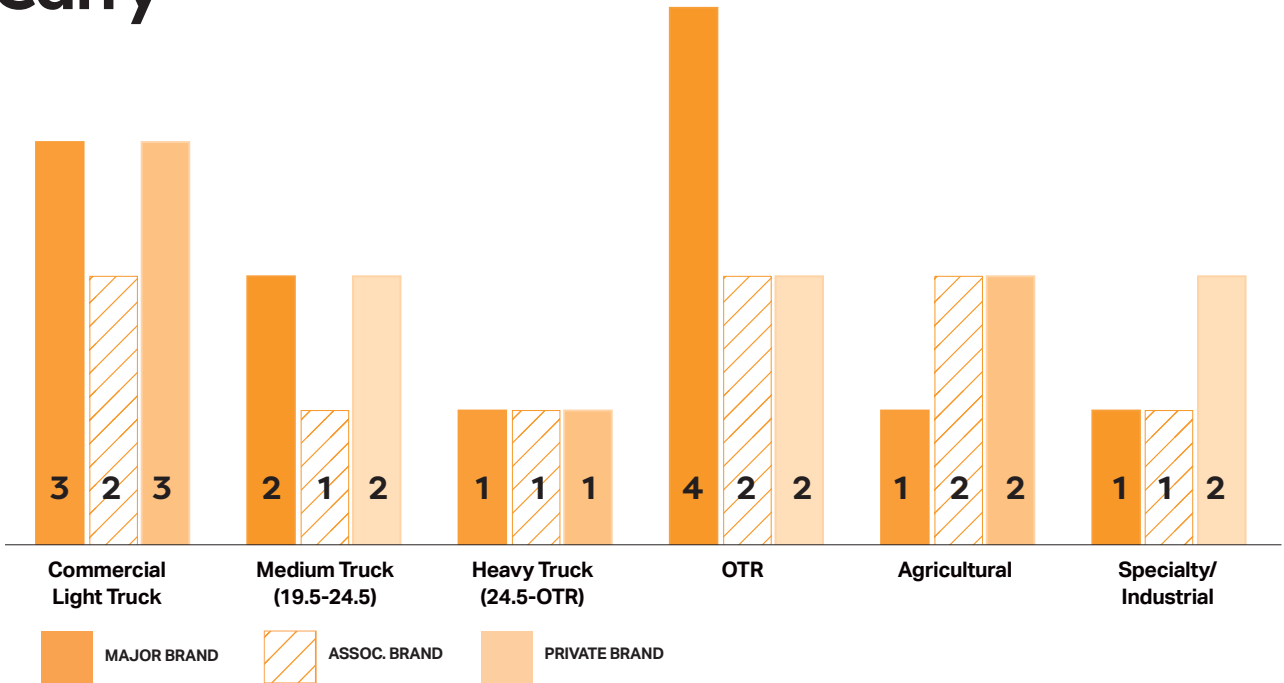
HP/UHP



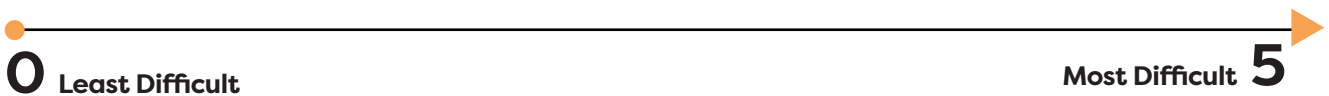
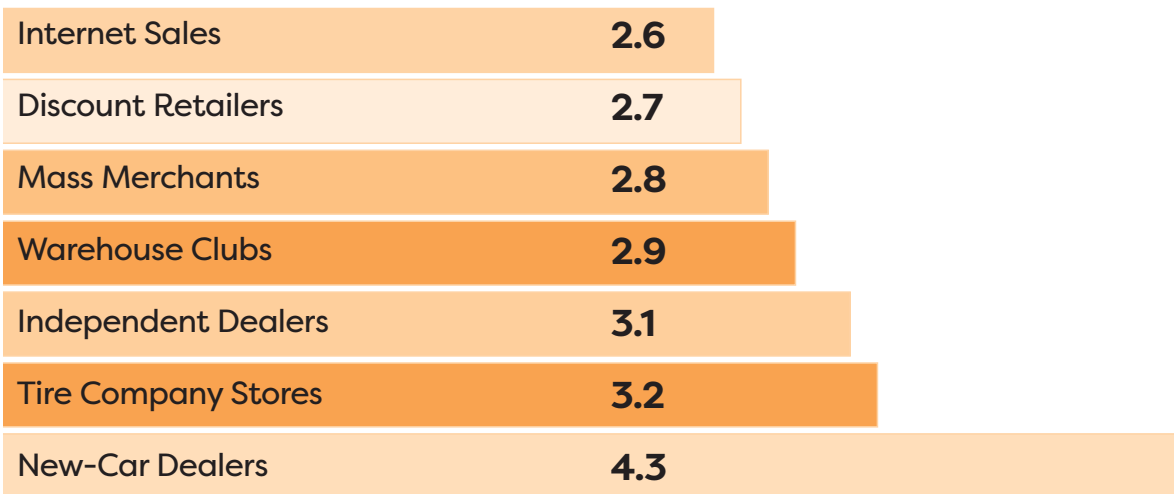
LT/SUV



# Number of Brands Commercial Dealers Carry



## Dealer's Toughest Competition



## Service Equipment Tire Dealers Lease/Own

<b>96%</b>	Tire changer: standard
<b>95%</b>	Air compressor
<b>94%</b>	Alignment rack
<b>94%</b>	Computerized tire/wheel balancer
<b>92%</b>	Tire changer: euro style
<b>92%</b>	A/C refrigerant recycler
<b>89%</b>	Above-ground lift
<b>87%</b>	Brake lathe: off-vehicle
<b>85%</b>	Battery tester/charger
<b>85%</b>	Parts cleaner
<b>80%</b>	Engine diagnostic analyzer
<b>78%</b>	TPMS reset/recalibrate tool
<b>67%</b>	Brake lathe: on-vehicle
<b>67%</b>	Service truck
<b>54%</b>	Nitrogen inflation system
<b>39%</b>	Tube benders

## How Dealers Advertise/ Promote

(2015 data (2014 results). More than 100% due to multiple responses)

<b>77% (70%)</b>	Website
<b>61.2% (79%)</b>	Word of mouth
<b>47.1% (54%)</b>	Social media
<b>43.4% (42%)</b>	Direct mail
<b>39.7% (41%)</b>	Newspaper ads
<b>38% (43%)</b>	Yellow Pages
<b>34% (42%)</b>	Radio ads
<b>27.6% (35%)</b>	Reminder cards
<b>27.3% (26%)</b>	Smartphone apps/mobile
<b>20.6% (30%)</b>	Community service
<b>9.4% (20%)</b>	Cable TV
<b>9.4% (18%)</b>	Local TV
<b>8.8% (18%)</b>	Field sales force
<b>3.5% (9%)</b>	Telemarketing



## Average Price: Replacement Passenger Radials

(2014 RMA most popular sizes)

Size	2014/2013 Major Brand	2014/2013 Import/Private Brand
195/65R15	\$100.66/\$99.83	\$75.00/\$68.77
205/55R16	\$112.20/\$109.91	\$70.00/\$78.91
215/60R16	\$112.08/\$115.28	\$77.00/\$75.14
225/60R16	\$115.33/\$115.80	\$79.99/\$78.64
195/60R15	\$102.64/\$97.63	\$70.00/\$67.02
P215/55R17	\$129.00/\$139.32	\$90.00/\$90.03
P235/75R15	\$113.92/\$121.63	\$89.95/\$94.70
P265/70R17	\$150.32/\$170.27	\$129.99/\$125.36
225/65R17	\$133.00/N/A	\$106.00/N/A
225/50R17	\$129.00/N/A	\$84.99/N/A

(Prices are for tires only)

## Average Price: Replacement LT Radials

(2014 RMA most popular sizes)

Size	2014/2013 Major Brand	2014/2013 Import/Private Brand
31x10.5R15	\$163.80/\$161.65	\$155.00/\$127.20
LT275/70R18	\$210.00/N/A	\$167.00/N/A
LT225/75R16	\$159.95/\$144.90	\$120.52/\$111.35
LT235/85R16	\$164.98/\$165.61	\$131.26/\$126.49
LT245/75R16	\$164.00/\$156.88	\$130.00/\$119.20
LT245/75R17	\$189.62/\$193.12	\$140.00/\$144.34
LT265/70R17	\$188.37/\$178.84	\$137.61/\$133.47
LT265/75R16	\$175.00/\$178.22	\$138.93/\$129.92
LT285/70R17	\$225.00/\$227.76	\$161.24/\$185.06
LT285/75R16	\$200.00/\$222.95	\$150.00/\$168.08

(Prices are for tires only)

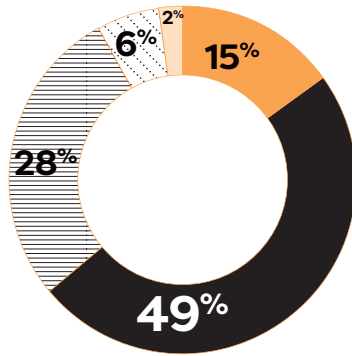
## Average Price: Replacement Medium Truck Radials

(2014 RMA most popular sizes)

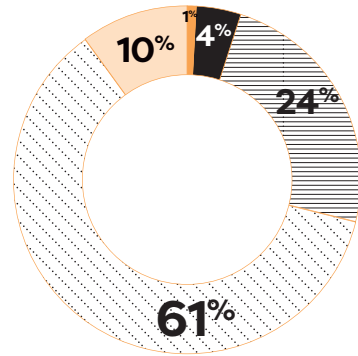
Size	2014/2013 Major Brand	2014/2013 Import/Private Brand
11R22.5	\$319.25/\$398.97	\$215.74/\$198.52
11R24.5	\$358.01/\$421.37	\$231.43/\$207.75
225/70R19.5	\$231.70/\$253.96	\$129.16/\$127.00
295/75R22.5	\$414.99/\$394.59	\$211.22/\$190.84
255/70R22.5	\$276.30/\$301.30	\$150.54/\$159.82
385/65R22.5	\$579.30/\$555.75	\$237.21/\$239.55
445/50R22.5	\$776.73/\$924.57	\$356.05/\$317.25
445/65R22.5	\$667.11/\$697.46	\$336.62/\$295.71
445/55R22.5	\$796.81/\$991.64	\$356.21/\$347.50

(Prices are for tires only)

## How Often Tire Dealers Specify Repair Part Brand



## How Often Consumers Specify Repair Part Brand



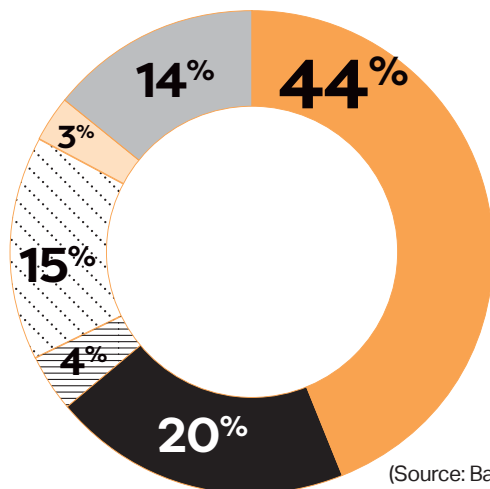
## Key Factors in Choosing a Repair Part Brand

Informative Catalog	3.7
Recognized Brand Name	3.9
Brand Used by OEMs	3.9
Line Coverage	4.0
Lifetime Warranty	4.0
Product Engineering	4.2
Availability	4.4
Quality/Fit/Function	4.9



## Where Dealers Buy Repair Parts

- Jobbers (NAPA, Carquest)
- Parts Retailers (AutoZone, O'Reilly)
- Direct from Manufacturer
- New Car Dealer
- Online Source
- Other



(Source: Babcox Research)

# Tire Dealers **Do A LOT** of Service Work!

(Total service jobs by U.S. tire dealerships performed in 2014)

SERVICE	2014 JOBS	SERVICE	2014 JOBS
Alignment.....	39,899,019	Ignition Coil.....	1,543,056
Transmission Maint. (Flush/Filter) .....	1,157,292	Lighting HID/Conv./Taillights.....	6,943,752
Axle (CV Joint/Axle).....	3,196,330	Oxygen Sensor.....	2,204,366
Axle (Live/Solid).....	2,601,152	Radiator.....	1,102,183
Battery.....	3,306,549	Shocks/Struts .....	3,912,749
Belt/Tensioner .....	3,747,422	Spark Plugs/Wire Sets.....	6,833,533
Brake Pads/Shoes .....	13,336,413	Starter.....	2,231,920
Brake Caliper .....	2,700,348	Steering Rack/Gear.....	1,322,619
Brake Hydraulics.....	2,612,173	Air Ride Compressor/Sensor.....	440,873
Brake Rotors .....	13,226,194	Air Ride Shock/Strut.....	440,873
Catalytic Converter .....	495,982	Ball Joints .....	2,314,584
Coolant Flush/Fill.....	991,965	Suspension Bushing.....	2,865,675
Exhaust System .....	1,653,274	Suspension Control Arm .....	2,259,475
Air Filters.....	4,408,731	Tie Rods .....	4,518,950
Cabin Air Filters .....	2,424,802	Thermostat .....	1,680,829
Fuel Filters.....	1,212,401	Timing Belt.....	661,310
Oil Filter .....	39,678,583	TPMS Relearn/Replacement.....	18,737,108
Fuel/Air Sensors (MAF/MAP).....	1,487,947	Water Pump .....	1,157,292
Coolant Hoses .....	1,983,929	Wheel Bearings .....	3,086,112
HVAC .....	1,146,270	Wiper Blades .....	5,070,041
Hybrid Driveline/Chassis .....	220,437		

(Source: Babcox Research)