

Market Profile: Tires

The tire industry is ever evolving. Passenger tire tariffs and pending truck tire tariffs are impacting or will impact the business of tire dealers across the U.S. Recently announced mergers and plant expansions within the U.S. could shake up the market even more.

With all of the shifts and changes and re-directions, 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.

Research presented here represents a wide array of topic areas impacting the tire industry. Data is TIRE REVIEW research unless noted. Please feel free to let us know other topic areas that may interest you in future issues by calling **TIRE REVIEW at 330-670-1234**. TR

U.S. Tire Import Data

2015 Top Importers, NAICS 326211 (Tire Manufacturing, Except Retreading)

Shown in actual dollar amount

Country	2012	2013	2014	2015	Percent Change 2014 - 2015
China	\$3,402,278,635	\$3,973,512,570	\$4,373,437,810	\$2,977,468,328	-31.9%
Canada	\$2,056,565,266	\$1,938,144,497	\$1,811,728,826	\$1,615,824,657	-10.8%
Korea	\$1,656,311,745	\$1,363,546,809	\$1,287,103,143	\$1,447,518,564	12.5%
Japan	\$1,657,086,832	\$1,468,883,153	\$1,411,796,082	\$1,430,194,664	1.3%
Thailand	\$911,238,214	\$899,161,271	\$890,690,516	\$1,146,333,054	28.7%
Mexico	\$740,551,759	\$722,658,984	\$703,176,348	\$812,594,800	15.6%
Indonesia	\$504,959,598	\$522,406,966	\$483,405,348	\$677,112,297	40.1%
Taiwan	\$372,207,362	\$374,766,794	\$385,256,546	\$473,815,574	23.0%
Germany	\$410,280,992	\$426,664,435	\$410,696,561	\$425,190,303	3.5%
Chile	\$300,115,632	\$356,809,788	\$393,616,472	\$347,923,362	-11.6%
France	\$334,153,922	\$347,352,625	\$313,676,367	\$284,731,590	-9.2%
Spain	\$206,827,647	\$210,509,995	\$212,442,512	\$234,174,494	10.2%
Brazil	\$418,702,466	\$297,534,219	\$272,191,267	\$231,498,096	-15.0%
United Kingdom	\$174,996,140	\$163,690,459	\$176,750,888	\$208,846,681	18.2%
Czech Republic	\$168,539,028	\$165,089,824	\$164,138,732	\$202,303,382	23.3%

(Source: U.S. International Trade Commission)

Top 25 Global Tire Manufacturers

Currency fluctuations and economic downturns around the globe impacted the year-to-year sales of the top tire producers. [Note: Sales figures are from 2015 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	2013	2014	2015
Continental AG	Germany	\$45.55	\$41.94	\$43.84
Bridgestone Corp.	Japan	\$36.50	\$30.75	\$31.50
Groupe Michelin	France	\$26.90	\$23.77	\$23.03
Goodyear Tire & Rubber Co.	U.S.	\$19.54	\$18.14	\$16.44
Sumitomo Rubber Industries Ltd.	Japan	\$7.99	\$7.01	\$7.05
Pirelli & C SpA	Italy	\$8.46	\$7.31	\$6.85
Hankook Tire Co.	South Korea	\$6.81	\$6.08	\$5.46
Yokohama Rubber Corp.	Japan	\$5.91	\$5.22	\$5.23
Cheng Shin Rubber/Maxxis	Taiwan	\$4.46	\$4.06	\$3.55
Giti Tire Pte. Ltd.	Singapore	\$4.04	\$4.28	\$3.06
Cooper Tire & Rubber Co.	U.S.	\$3.44	\$3.42	\$2.97
Toyo Tire & Rubber Co.	Japan	\$3.52	\$3.28	\$3.38
MRF Ltd.	India	\$1.97	\$2.10	\$3.02
Trelleborg AB	Sweden	\$3.31	\$2.91	\$2.93
Kumho Tire Co.	South Korea	\$3.51	\$3.13	\$2.63
Double Coin Holdings Ltd.	China	\$2.36	\$2.39	\$1.92
Apollo Tyres Ltd.	India	\$2.20	\$2.04	\$1.72
Nokian Tyres plc	Finland	\$2.10	\$2.16	\$1.47
Titan International	U.S.	\$2.16	\$1.90	\$1.39
Nexen Tire Corp.	South Korea	\$1.58	\$1.60	\$1.56
Hangzhou Zhongce Rubber Co.	China	\$3.96	\$3.29	n/a
Triangle Group Co.	China	\$2.73	\$2.84	n/a
Shandong Linglong Rubber Co.	China	\$1.89	\$1.66	n/a
Sailun Jinyu Group Co.	China	\$1.14	\$1.44	n/a
Xingyuan Tyre Co.	China	\$1.57	\$1.40	n/a

2015 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
2015	206.20	49.7

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
2015	29.30	4.4

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
2015	7.50	0.90

MEDIUM TRUCK (millions of units)

Year	Replacement	OE	Retreads
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	5.70	15.20
2015	18.0	6.2	n/a

(Source: RMA)

2015 Top U.S. Tire Sizes

REPLACEMENT P-METRIC

Rank	Size
1	205/55R16
2	215/60R16
3	195/65R15
4	225/60R16
5	225/65R17
6	215/55R17
7	P235/75R15
8	225/50R17
9	P265/70R17
10	195/60R15

OE P-METRIC

Rank	Size
1	P215/55R17
2	P265/70R17
3	P215/60R16
4	225/65R17
5	215/55R17
6	P195/65R15
7	P275/65R18
8	235/55R17
9	P275/60R20
10	P205/55R16

REPLACEMENT LT-METRIC

Rank	Size
1	LT245/75R17
2	LT265/70R17
3	LT265/75R16
4	LT225/75R16
5	LT235/85R16
6	LT245/75R17
7	LT285/70R17
8	LT275/70R18
9	LT285/75R16
10	31X10.50R15

OE LT-METRIC

Rank	Size
1	LT245/75R17
2	LT225/75R16
3	LT265/70R18
4	LT275/70R18
5	LT245/75R16
6	LT265/70R17
7	LT255/75R17
8	LT265/60R20
9	LT275/65R18
10	LT235/80R17

REPLACEMENT MEDIUM TRUCK

Rank	Size
1	295/75R22.5
2	11R22.5
3	11R24.5
4	225/70R19.5
5	255/70R22.5

OE MEDIUM TRUCK

Rank	Size
1	295/75R22.5
2	11R22.5
3	275/80R22.5
4	225/70R19.5
5	11R24.5

(Source: RMA)

Deep Thinker

The Smart Money is on our extra deep 30/32" tread depth



With its 30/32" tread depth, you can count on our RLB400 drive position tire for long original mileage.

Our advanced tread designs deliver superior handling and maximum traction in all kinds of road conditions. You can also be certain that our integrity goes even deeper. All Double Coin tires are engineered with heavy-duty casings for improved strength, stability and multiple retreads. That's why you'll get more out of every mile with Double Coin.

THE SMART MONEY IS ON

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SOURCEBOOK 2016

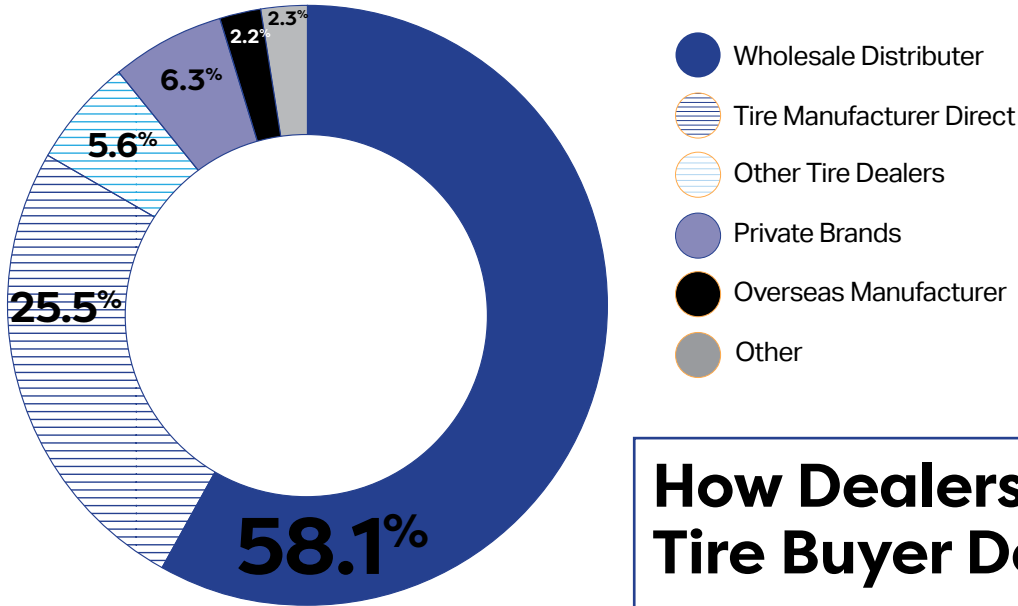
Dealer's Toughest Competition

1. Car dealerships
2. Discount retailers
3. Tire company stores
4. Mass merchants
5. Warehouse clubs
6. Internet sales
7. Other independent tire dealers

Top 10 Tire Dealer Concerns

1. Profitability
2. Customer retention
3. Getting/keeping qualified employees
4. Tire pricing by suppliers
5. Cost of wages/benefits
6. Quality of new tires
7. Tiremakers selling directly to consumers via internet
8. Vehicle service information availability
9. National/state legislature
10. Price competition from other tire dealers

Where Dealers Get Consumer Tires



How Dealers Influence Tire Buyer Decisions

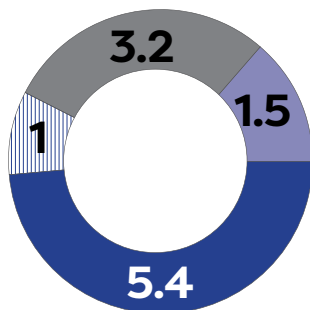
36% Customers ask for a specific tire brand, and...

59% Will follow tire dealer recommendation, but...

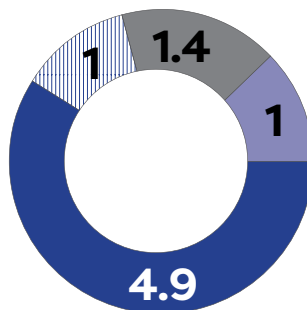
22% Replace OE tire with exact same tire

Number of Tire Brands Retail Dealers Carry

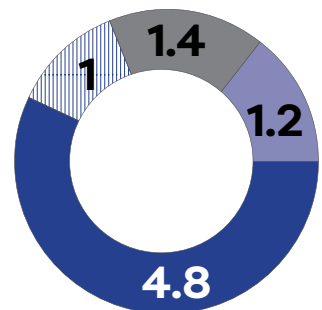
Standard Passenger



HP/UHP

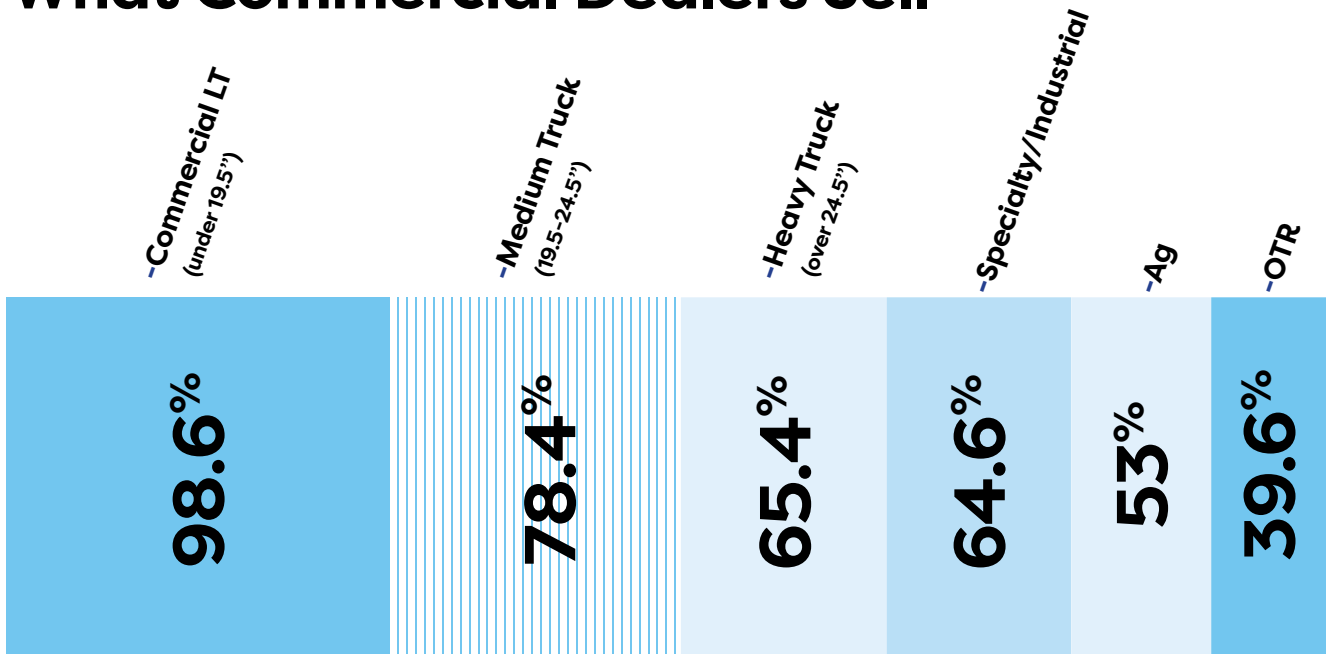


LT/SUV

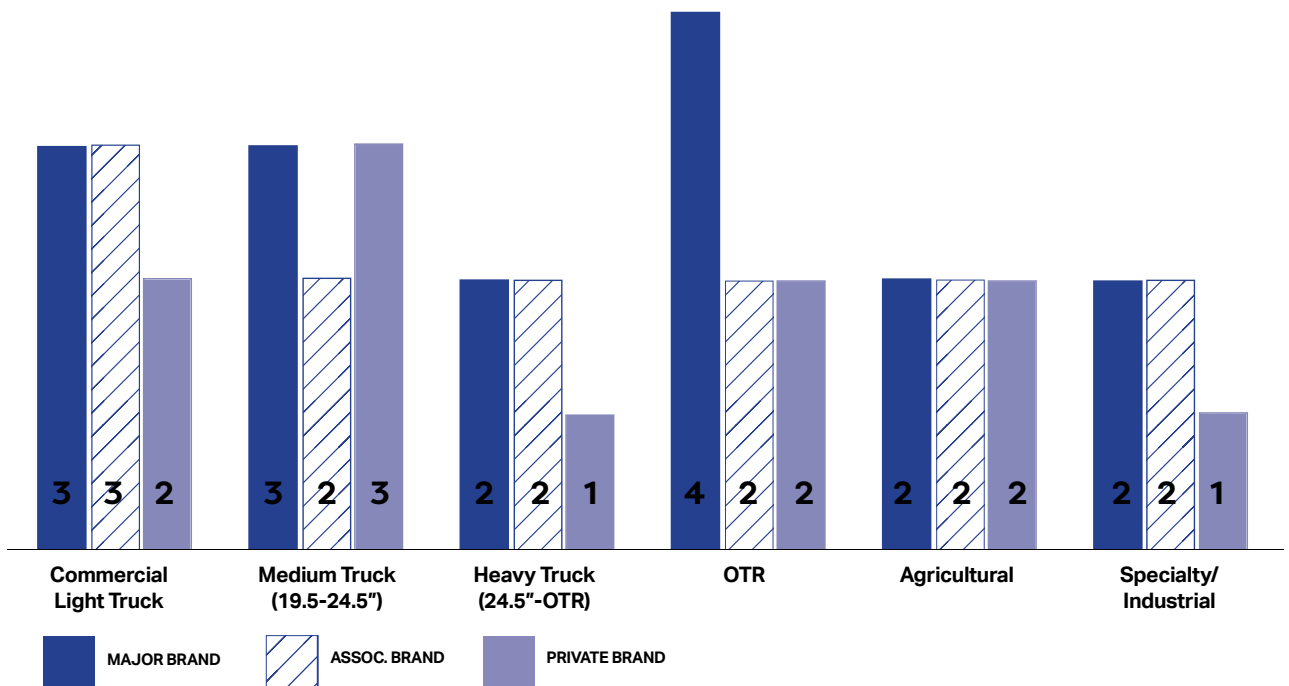


● Major
 ● House/Associate
 ● Private
 ● Chinese

What Commercial Dealers Sell



Number of Brands Commercial Dealers Carry



Most Popular Tire Fitments by Region

(Source: Fitment Group)

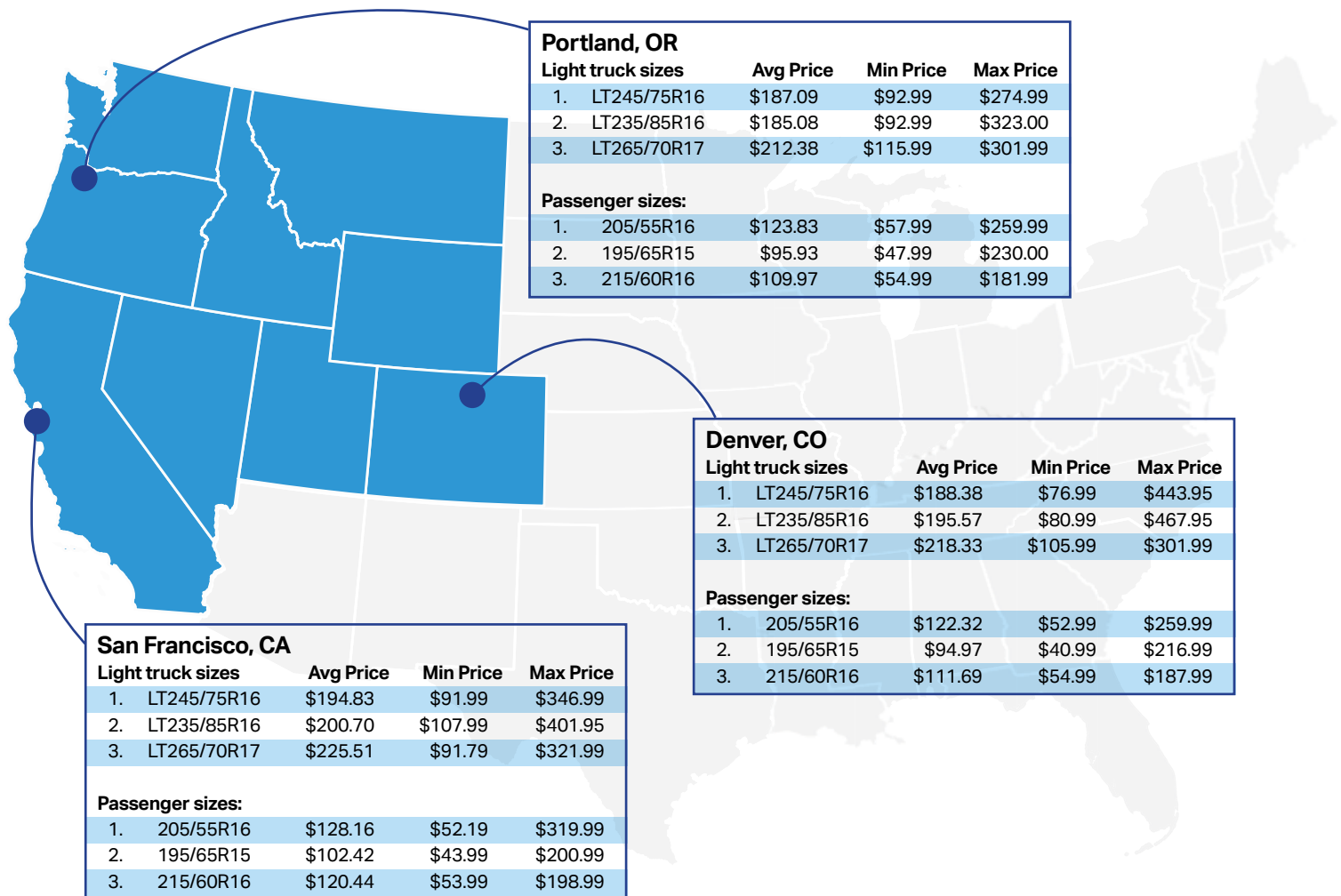
West

Passenger sizes

1.....	.205/55R16
2.....	.195/65R15
3.....	.215/60R16
4.....	.265/70R17
5.....	.215/55R17
6.....	.235/75R15
7.....	.225/65R17
8.....	.225/60R16
9.....	.205/65R15
10.....	.195/60R15

Light truck sizes

1.....	LT245/75R16
2.....	LT235/85R16
3.....	LT265/70R17
4.....	LT225/75R16
5.....	LT265/75R16
6.....	LT215/85R16
7.....	31X10.5R15
8.....	LT245/70R17
9.....	LT275/70R18
10.....	LT245/75R17



Portland, OR

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$187.09	\$92.99	\$274.99
2. LT235/85R16	\$185.08	\$92.99	\$323.00
3. LT265/70R17	\$212.38	\$115.99	\$301.99

Passenger sizes:

1. 205/55R16	\$123.83	\$57.99	\$259.99
2. 195/65R15	\$95.93	\$47.99	\$230.00
3. 215/60R16	\$109.97	\$54.99	\$181.99

Denver, CO

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$188.38	\$76.99	\$443.95
2. LT235/85R16	\$195.57	\$80.99	\$467.95
3. LT265/70R17	\$218.33	\$105.99	\$301.99

Passenger sizes:

1. 205/55R16	\$122.32	\$52.99	\$259.99
2. 195/65R15	\$94.97	\$40.99	\$216.99
3. 215/60R16	\$111.69	\$54.99	\$187.99

San Francisco, CA

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$194.83	\$91.99	\$346.99
2. LT235/85R16	\$200.70	\$107.99	\$401.95
3. LT265/70R17	\$225.51	\$91.79	\$321.99

Passenger sizes:

1. 205/55R16	\$128.16	\$52.19	\$319.99
2. 195/65R15	\$102.42	\$43.99	\$200.99
3. 215/60R16	\$120.44	\$53.99	\$198.99

Most Popular Tire Fitments by Region

(Source: Fitment Group)

Northeast

Passenger sizes

1.....	.215/60R16
2.....	.205/55R16
3.....	.225/65R17
4.....	.195/65R15
5.....	.215/55R17
6.....	.225/60R16
7.....	.265/70R17
8.....	.235/70R16
9.....	.195/60R15
10.....	.205/65R15

Light truck sizes

1.....	LT245/75R16
2.....	LT225/75R16
3.....	LT235/85R16
4.....	LT265/70R17
5.....	LT245/70R17
6.....	LT265/75R16
7.....	LT245/75R17
8.....	LT275/70R18
9.....	LT215/85R16
10.....	LT265/70R18

Alaska

Passenger sizes

1.....	.265/70R17
2.....	.235/75R15
3.....	.245/75R16
4.....	.205/55R16
5.....	.235/70R16
6.....	.225/65R17
7.....	.225/75R15
8.....	.215/60R16
9.....	.225/60R16
10.....	.265/70R16

Light truck sizes

1.....	LT 245/75R16
2.....	LT 235/85R16
3.....	LT 265/70R17
4.....	LT 225/75R16
5.....	LT 265/75R16
6.....	LT 245/70R17
7.....	31X10.5R15
8.....	LT 215/85R16
9.....	LT 275/70R18
10.....	LT 245/75R17

Philadelphia, PA

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$187.53	\$98.99	\$425.99
2. LT225/75R16	\$172.04	\$89.99	\$426.99
3. LT235/85R16	\$181.81	\$89.00	\$449.99

Passenger sizes:

1. 215/60R16	\$117.08	\$59.39	\$222.99
2. 205/55R16	\$129.34	\$54.90	\$319.99
3. 225/65R17	\$145.90	\$71.99	\$291.99

New York, NY

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$178.76	\$98.00	\$282.00
2. LT225/75R16	\$166.22	\$89.99	\$274.00
3. LT235/85R16	\$176.86	\$89.00	\$293.00

Passenger sizes:

1. 215/60R16	\$118.72	\$59.39	\$222.99
2. 205/55R16	\$130.53	\$49.41	\$308.00
3. 225/65R17	\$144.82	\$71.99	\$291.99

Most Popular Tire Fitments by Region

(Source: Fitment Group)

Southeast

Passenger sizes

1.....	.215/60R16
2.....	.205/55R16
3.....	.225/60R16
4.....	.265/70R17
5.....	.235/75R15
6.....	.195/65R15
7.....	.215/55R17
8.....	.225/65R17
9.....	.235/70R16
10.....	.205/65R15

Light truck sizes

1.....	LT 245/75R16
2.....	LT225/75R16
3.....	LT235/85R16
4.....	LT 265/70R17
5.....	LT 265/75R16
6.....	LT 245/70R17
7.....	LT 215/85R16
8.....	LT 245/75R17
9.....	31X10.5R15
10.....	LT275/70R18

Charlotte, NC

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$189.43	\$92.69	\$425.99
2. LT225/75R16	\$182.13	\$93.99	\$426.99
3. LT235/85R16	\$198.74	\$104.39	\$449.99

Passenger sizes:

1. 215/60R16	\$111.78	\$54.99	\$190.99
2. 205/55R16	\$125.47	\$53.99	\$319.99
3. 225/60R16	\$116.18	\$55.99	\$281.00

Nashville, TN

Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$193.57	\$103.99	\$367.99
2. LT225/75R16	\$188.37	\$95.99	\$426.99
3. LT235/85R16	\$204.14	\$106.99	\$437.99

Passenger sizes:

1. 215/60R16	\$117.37	\$55.99	\$245.00
2. 205/55R16	\$130.78	\$57.99	\$319.99
3. 225/60R16	\$120.74	\$55.99	\$279.00

Atlanta, GA

Light truck sizes	Avg Price	Min Price	Max Price
1. LT 245/75R16	\$188.51	\$92.69	\$425.99
2. LT225/75R16	\$180.5	\$98.99	\$426.99
3. LT235/85R16	\$196.49	\$104.39	\$449.99

Passenger sizes:

1. 215/60R16	\$111.96	\$54.99	\$190.99
2. 205/55R16	\$125.94	\$49.41	\$319.99
3. 225/60R16	\$116.05	\$55.99	\$278.00

Most Popular Tire Fitments by Region

(Source: Fitment Group)

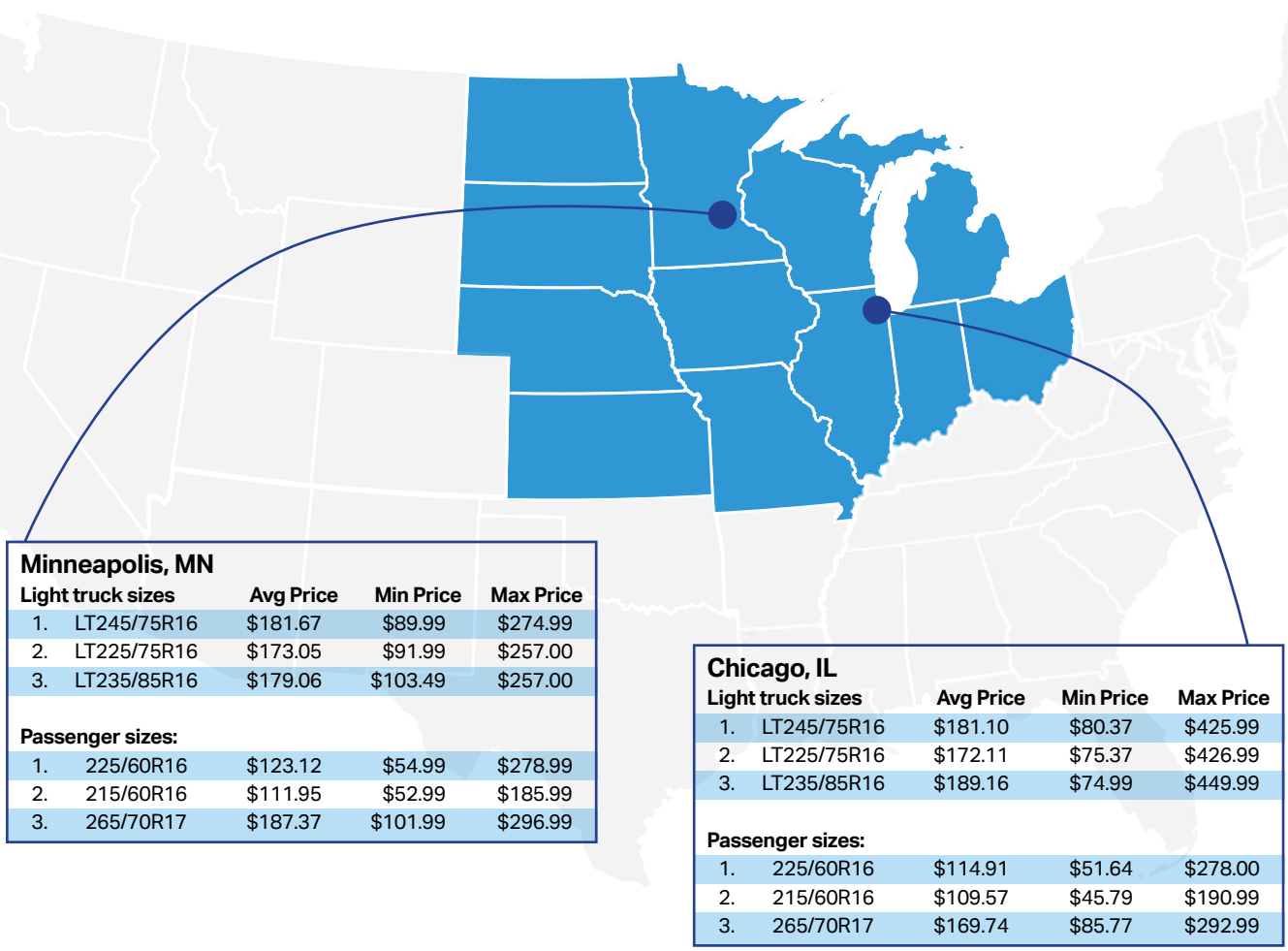
Midwest

Passenger sizes

1.....	.225/60R16
2.....	.215/60R16
3.....	.265/70R17
4.....	.225/65R17
5.....	.205/55R16
6.....	.235/75R15
7.....	.195/65R15
8.....	.235/70R16
9.....	.215/70R15
10.....	.215/55R17

Light truck sizes

1.....	LT 245/75R16
2.....	LT 225/75R16
3.....	LT 235/85R16
4.....	LT 265/70R17
5.....	LT 245/70R17
6.....	LT 265/75R16
7.....	LT 215/85R16
8.....	LT 265/70R18
9.....	LT 245/75R17
10.....	LT 275/70R18



Minneapolis, MN			
Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$181.67	\$89.99	\$274.99
2. LT225/75R16	\$173.05	\$91.99	\$257.00
3. LT235/85R16	\$179.06	\$103.49	\$257.00
Passenger sizes:			
	Avg Price	Min Price	Max Price
1. 225/60R16	\$123.12	\$54.99	\$278.99
2. 215/60R16	\$111.95	\$52.99	\$185.99
3. 265/70R17	\$187.37	\$101.99	\$296.99

Chicago, IL			
Light truck sizes	Avg Price	Min Price	Max Price
1. LT245/75R16	\$181.10	\$80.37	\$425.99
2. LT225/75R16	\$172.11	\$75.37	\$426.99
3. LT235/85R16	\$189.16	\$74.99	\$449.99
Passenger sizes:			
	Avg Price	Min Price	Max Price
1. 225/60R16	\$114.91	\$51.64	\$278.00
2. 215/60R16	\$109.57	\$45.79	\$190.99
3. 265/70R17	\$169.74	\$85.77	\$292.99

Most Popular Tire Fitments by Region

(Source: Fitment Group)

Southwest

Passenger sizes

1.....	.265/70R17
2.....	.215/60R16
3.....	.205/55R16
4.....	.215/55R17
5.....	.235/75R15
6.....	.195/65R15
7.....	.225/60R16
8.....	.275/55R20
9.....	.225/65R17
10.....	.235/70R16

Light truck sizes

1.....	LT 245/75R16
2.....	LT 265/70R17
3.....	LT 235/85R16
4.....	LT 225/75R16
5.....	LT 265/75R16
6.....	LT 245/70R17
7.....	LT 245/75R17
8.....	LT 275/70R18
9.....	LT 215/85R16
10.....	LT 265/70R18

Phoenix, AZ

Light truck sizes

1.	LT245/75R16	\$186.36	\$98.99	\$303.99
2.	LT265/70R17	\$218.21	\$91.79	\$301.99
3.	LT235/85R16	\$191.00	\$80.99	\$344.99

Passenger sizes:

1.	265/70R17	\$170.64	\$78.29	\$296.99
2.	215/60R16	\$110.38	\$54.99	\$181.99
3.	205/55R16	\$119.52	\$51.99	\$259.99

Hawaii

Passenger sizes

1.....	.205/55R16
2.....	.195/65R15
3.....	.265/70R16
4.....	.215/60R16
5.....	.225/65R17
6.....	.215/55R17
7.....	.225/75R15
8.....	.205/65R15
9.....	.245/75R16
10.....	.265/65R17

Light truck sizes

1.....	LT 245/75R16
2.....	LT 225/75R16
3.....	31X10.5R15
4.....	LT 235/85R16
5.....	LT 265/70R17
6.....	LT 265/75R16
7.....	LT 215/85R16
8.....	LT 245/75R17
9.....	LT 245/70R17
10.....	LT 275/65R18

Dallas, TX

Light truck sizes

1.	LT245/75R16	\$185.98	\$92.69	\$426.99
2.	LT265/70R17	\$209.60	\$103.49	\$301.99
3.	LT235/85R16	\$192.40	\$92.99	\$450.99

Passenger sizes:

1.	265/70R17	\$170.00	\$86.39	\$296.99
2.	215/60R16	\$109.89	\$52.19	\$190.99
3.	205/55R16	\$121.26	\$54.90	\$319.99