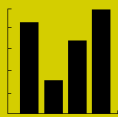


# MARKET PROFILE



Today's North American tire industry is constantly in flux. At any given time, several market forces are working in tandem to shape and re-shape the present and future of the tire industry. It's this constantly changing landscape that makes it so 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

shipments for passenger, light truck/SUV, medium truck, OTR, ag/forestry; a look at the OE and replacement segments of the high performance market; the most popular tire sizes at OE and replacement; and brand and channel segmentation, new vehicle sales and vehicle registrations.

As an additional bonus, TIRE REVIEW presents tire brand market share data – applied strictly to the independent tire dealer channel – covering the passenger, light truck/SUV, high performance, medium truck, OTR and ag/forestry tire segments.

It's a truly comprehensive look at a dynamic industry.

## U.S. Dealer Channel Brand Marketshares

### P-Metric

2003 RMA Replacement Shipments: 193.61 million

Shares Rounded to Nearest 0.05%

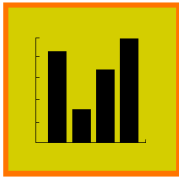
Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	12.85%	Toyo	2.20%	Regul	0.85%
Michelin	8.70%	Yokohama	2.15%	Sumitomo	0.75%
Firestone	8.50%	Mastercraft	2.00%	Dean	0.70%
Bridgestone	6.75%	Dunlop	1.95%	Lee	0.60%
BFGoodrich	4.85%	Cordovan	1.85%	Winston	0.60%
Cooper	4.65%	Hercules	1.80%	Arizonian	0.55%
General	3.80%	Delta	1.60%	Eldorado	0.55%
Multi-Mile	2.90%	Continental	1.20%	Laramie	0.55%
Uniroyal	2.85%	Pirelli	1.15%	Falken	0.50%
Dayton	2.55%	Big O	1.00%	Jetzon	0.50%
Kelly	2.45%	Sigma	1.00%	Summit	0.45%
Kumho	2.30%	National	0.90%	Vanderbilt	0.35%
Hankook	2.25%	American Radial	0.85%	<b>Others</b>	<b>8.00%</b>

### Performance (H-Rated & Above)

2003 RMA Replacement Shipments: 36.09 million

Shares Rounded to Nearest 0.05%

Brand	Dealer Share	Brand	Dealer Share	Brand	Dealer Share
Goodyear	15.25%	Kumho	4.30%	Kelly	1.70%
Michelin	12.85%	Pirelli	4.00%	Multi-Mile	1.40%
Bridgestone	8.65%	Falken	3.80%	Dayton	1.15%
Yokohama	7.35%	Cooper	2.75%	Big O	0.90%
Toyo	7.10%	Sumitomo	2.65%	Mastercraft	0.45%
BFGoodrich	6.45%	General	2.45%	Nitto	0.30%
Firestone	5.35%	Hankook	2.40%	<b>Others</b>	<b>1.30%</b>
Dunlop	5.20%	Continental	2.25%		



## U.S. Dealer Channel Brand Marketshares

### LT-Metric

2003 RMA Replacement  
Shipments: 34.49 million  
Shares Rounded to Nearest 0.05%

<b>Brand</b>	<b>Dealer Share</b>
Goodyear	10.25%
BFGoodrich	8.80%
Michelin	7.45%
Bridgestone	7.05%
Cooper	7.00%
Firestone	6.65%
Multi-Mile	5.50%
General	5.40%
Kelly	3.70%
Mastercraft	2.90%
Toyo	2.85%
Cordovan	2.70%
Yokohama	2.40%
Uniroyal	2.35%
Delta	2.15%
Dunlop	1.95%
Continental	1.90%
Dayton	1.80%
Kumho	1.45%
National	1.30%
Pirelli	1.25%
Big O	0.95%
Hankook	0.90%
Hercules	0.90%
Eldorado	0.85%
Laramie	0.75%
Mickey Thompson	0.50%
Maxxis	0.40%
Remington	0.25%
Jetzon	0.25%
ProComp	0.25%
Lee	0.20%
Falken	0.15%
<b>Others</b>	<b>6.85%</b>

### Medium Truck

2003 RMA Replacement  
Shipments: 15.52 million  
Shares Rounded to Nearest 0.05%

<b>Brand</b>	<b>Dealer Share</b>
Goodyear	19.15%
Bridgestone	17.55%
Michelin	16.75%
Firestone	6.85%
Yokohama	5.10%
General	4.90%
Toyo	4.55%
Kelly	2.75%
Sumitomo	2.70%
Dunlop	2.65%
Hankook	2.45%
Continental	2.25%
Kumho	2.20%
Cooper	2.00%
Power King	1.70%
Hercules	1.45%
BFGoodrich	1.20%
Double Coin	0.70%
<b>Others</b>	<b>3.1%</b>

### OTR

2003 Industry Replacement  
Shipments: 130.43 thousand  
Shares Rounded to Nearest 0.05%

<b>Brand</b>	<b>Bias Share</b>	<b>Radial Share</b>
Bridgestone	9.50%	37.50%
Firestone	26.50%	—
Michelin	—	27.25%
Goodyear	28.25%	24.50%
General	18.15%	—
Titan	8.00%	—
Continental	—	4.00%
<b>Others</b>	<b>9.60%</b>	<b>6.75%</b>

### Agricultural

2003 Industry Replacement  
Shipments: 1.98 million  
Shares Rounded to Nearest 0.05%

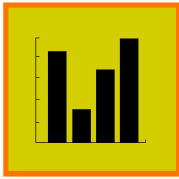
#### Rear Tire Segment

<b>Brand</b>	<b>Bias Share</b>	<b>Radial Share</b>
Firestone	39.45%	36.55%
Goodyear	14.85%	31.40%
Titan	16.90%	9.65%
Uni. Co-Op	7.05%	8.90%
Michelin	—	6.20%
Kelly	6.05%	3.25%
BFGoodrich	—	1.85%
Harvest King	5.95%	—
Akuret	3.20%	—
Alliance	2.20%	0.90%
Galaxy	2.05%	—
Denman	1.65%	—
Trelleborg	—	0.70%
<b>Others</b>	<b>0.65%</b>	<b>0.60%</b>

#### Front/Implement Segment

<b>Brand</b>	<b>Dealer Share</b>
Firestone	37.15%
Goodyear	17.25%
Titan	12.80%
Kelly	8.10%
Harvest King	6.65%
Universal Co-Op	6.15%
American Farmer	5.05%
Denman	3.50%
Galaxy	1.60%
Alliance	0.70%
<b>Others</b>	<b>1.05%</b>

(Source: TR Estimates)



## U.S. Tire Shipments

### P-Metric (millions of units)

Year	Replacement	OE
1998	185.52	57.13
1999	191.90	61.00
2000	198.87	60.19
2001	190.77	54.56
2002	190.54	57.32
2003	193.61	54.54

(Source: RMA)

### M+S-Rated (millions of units)

Year	Replacement	OE
1998	7.22	4.76
1999	8.66	5.80
2000	8.77	5.59
2001	7.77	2.01
2002	6.28	2.15
2003	6.87	2.21

(Source: RMA)

### LT-Metric (millions of units)

Year	Replacement	OE
1998	31.35	6.96
1999	33.80	8.42
2000	34.33	7.33
2001	31.50	6.15
2002	33.64	8.30
2003	34.49	7.95

(Source: RMA)

### Medium Truck (millions of units)

Year	Replacement	OE	Retreads
1998	13.67	5.97	N/A
1999	14.66	6.86	15.81
2000	15.01	5.59	16.10
2001	13.57	3.44	15.47
2002	14.72	3.86	15.56
2003	15.52	4.16	15.59

(Source: RMA & TR Estimates)

### OTR (thousands of units)

Year	Replacement		OE	
	Bias	Radial	Bias	Radial
1998	97.48	62.32	26.97	47.94
1999	87.32	62.19	23.59	41.88
2000	78.08	61.53	20.09	47.05
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

(Source: TR Estimates)

### Ag/Forestry (millions of units)

Year	Replacement	OE
1998	1.7	0.87
1999	1.6	0.82
2000	1.6	0.81
2001	1.5	0.74
2002	1.4	0.70
2003	1.3	0.68

(Source: TR Estimates)

## Canada Tire Shipments

### P-Metric (millions of units)

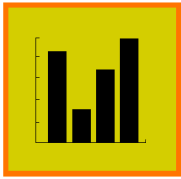
Year	Replacement	OE
1998	14.00	11.59
1999	14.66	13.82
2000	14.82	13.47
2001	15.67	10.98
2002	16.17	11.14
2003	16.33	11.30

(Source: Rubber Association of Canada)

### Winter (millions of units)

Year	Replacement
1998	3.23
1999	3.92
2000	3.75
2001	4.16
2002	4.46
2003	4.43

(Source: Rubber Association of Canada)



## Canada Tire Shipments

### LT-Metric (millions of units)

Year	Replacement	OE
1998	2.21	0.47
1999	2.44	0.51
2000	2.37	0.47
2001	2.44	0.90
2002	2.63	0.88
2003	2.62	0.80

(Source: Rubber Association of Canada)

### Medium Truck (millions of units)

Year	Replacement	OE
1998	1.44	0.70
1999	1.49	0.81
2000	1.44	0.66
2001	1.34	0.43
2002	1.48	0.48
2003	1.39	0.42

(Source: Rubber Association of Canada)

## 2003 Top Tire Sizes – U.S.

### Replacement P-Metric

Rank	Size	Share
1	P235/75R15	6.1%
2	P225/60R16	4.5%
3	P205/65R15	4.4%
4	P205/70R15	3.7%
5	P215/70R15	3.4%
6	P185/65R14	2.9%
7	P195/70R14	2.4%
8	P195/65R15	2.2%
9	P205/75R14	1.9%
10	P205/75R15	1.9%
<b>Total</b>		<b>33.4%</b>

### OE P-Metric

Rank	Size	Share
1	P265/70R17	6.0%
2	P265/70R16	5.3%
3	P235/70R16	5.3%
4	P245/65R17	4.6%
5	P205/65R15	4.4%
6	P205/60R16	4.0%
7	P215/60R16	3.7%
8	P245/70R16	3.0%
9	P195/65R15	2.5%
10	P225/60R16	2.0%
<b>Total</b>		<b>40.6%</b>

### Replacement LT-Metric

Rank	Size	Share
1	LT265/75R16	13.2%
2	LT245/75R16	12.7%
3	LT235/85R16	12.6%
4	31x10.50R15	8.5%
5	LT225/75R16	7.5%
6	LT235/75R15	6.2%
7	LT285/75R16	4.6%
8	LT215/85R16	4.3%
9	30x9.50R15	2.8%
10	33x12.50R15	1.3%
<b>Total</b>		<b>73.8%</b>

### OE LT-Metric

Rank	Size	Share
1	LT245/75R16	31.8%
2	LT265/75R16	12.1%
3	LT235/85R16	11.7%
4	LT225/75R16	9.8%
5	LT215/85R16	4.3%
6	LT235/80R17	3.4%
7	LT315/70R17	2.5%
8	LT235/75R16	2.5%
9	LT275/65R18	1.5%
10	30x9.50R15	1.2%
<b>Total</b>		<b>80.8%</b>

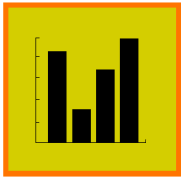
### Replacement Medium Truck

Rank	Size	Share
1	295/75R22.5	20.2%
2	11R22.5	18.2%
3	11R24.5	12.5%
4	285/75R24.5	8.7%
5	225/70R19.5	3.8%
<b>Total</b>		<b>63.5%</b>

### OE Medium Truck

Rank	Size	Share
1	295/75R22.5	34.8%
2	11R22.5	23.7%
3	225/70R19.5	9.3%
4	11R24.5	6.9%
5	285/75R24.5	4.1%
<b>Total</b>		<b>78.9%</b>

(Source: RMA)



## 2003 Top Replacement Tire Sizes – Canada

P-Metric Tires			Performance Tires			Winter Tires		
Rank	Size	Share	Rank	Size	Share	Rank	Size	Share
1	P185/65R14	7.3%	1	P225/60R16	6.7%	1	P185/65R14	4.9%
2	P205/70R15	7.1%	2	.....205/55R16	4.1%	2	P215/70R15	3.8%
3	P215/70R15	6.4%	3	P205/55R16	3.7%	3	.....195/65R15	3.7%
4	P225/60R16	6.2%	4	P195/65R15	3.7%	4	P155/80R13	3.3%
5	P195/70R14	4.9%	5	P195/60R15	3.4%	5	.....185/65R14	3.2%
6	P195/65R15	4.9%	6	P205/60R16	2.9%	6	P205/70R15	3.0%
7	P205/65R15	4.4%	7	.....195/65R15	2.8%	7	P195/70R14	3.0%
8	P185/70R14	4.0%	8	.....205/65R15	2.6%	8	P195/65R15	2.9%
9	P205/75R14	3.8%	9	P195/60R14	2.6%	9	P185/70R14	2.7%
10	P175/70R13	3.2%	10	.....195/60R15	2.5%	10	P175/70R13	2.5%

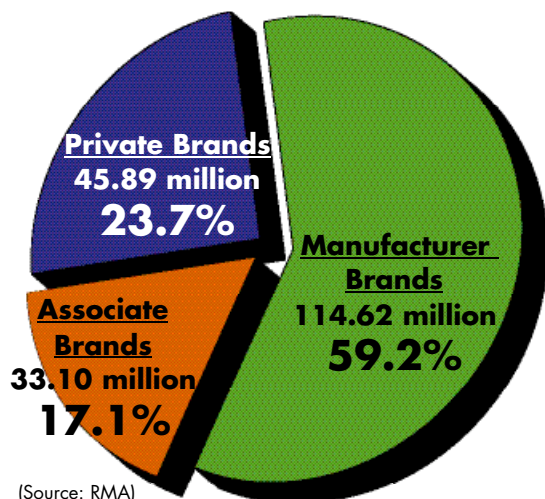
(Source: Rubber Association of Canada)

LT/SUV Tires					
(P- and LT-Metric)					
Rank	Size	Share	Rank	Size	Share
1	LT245/75R16	13.1%	6	LT235/75R15	5.5%
2	LT235/85R16	9.8%	7	LT285/75R16	3.1%
3	P235/85R15	9.4%	8	31x10.50R15	2.9%
4	LT265/75R16	9.0%	9	P245/75R16	2.8%
5	LT225/75R16	6.4%	10	LT215/85R16	2.2%

## U.S. 2003 Brand-Type Shares

### P-Metric Replacement

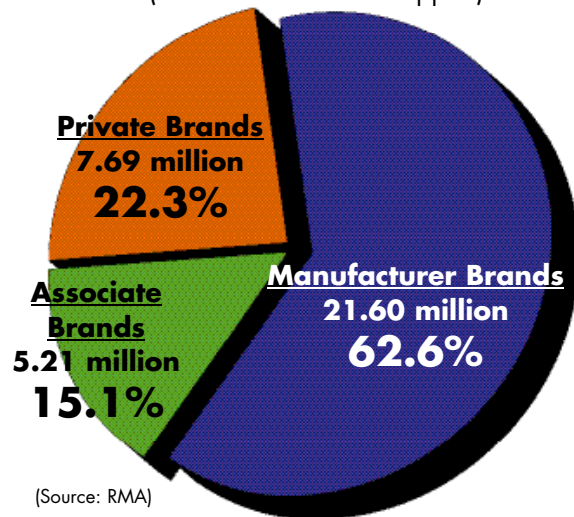
(193.61 million units shipped)



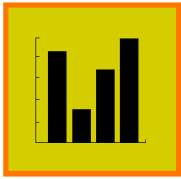
(Source: RMA)

### LT-Metric Replacement

(34.49 million units shipped)

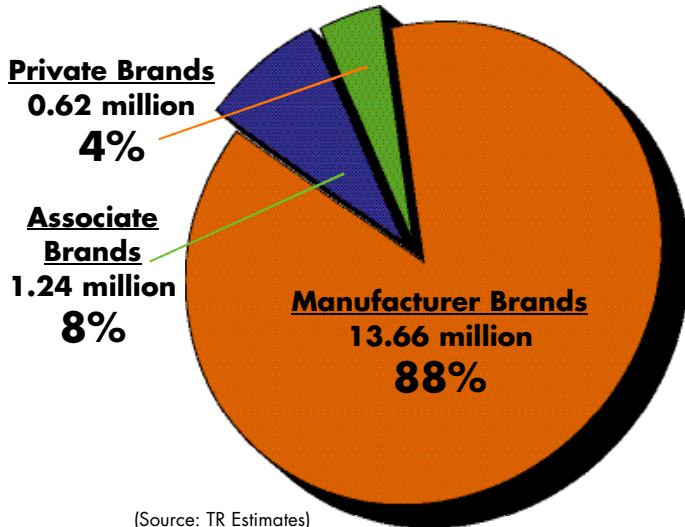


(Source: RMA)



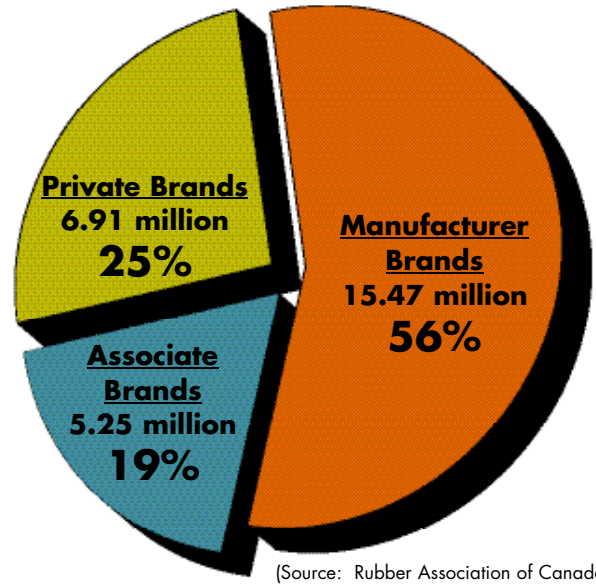
## U.S. 2003 Brand-Type Shares

### Medium Truck Replacement (15.52 million units shipped)



## Canada 2003 Brand-Type Shares

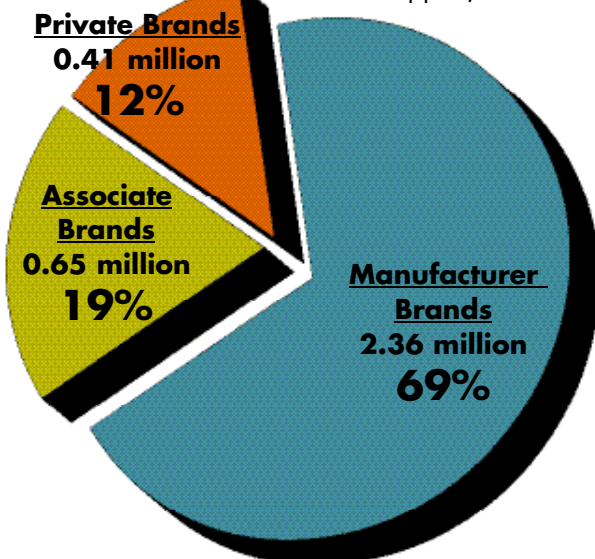
### P-Metric (OE & Replacement – 27.63 million units shipped)



## Canada 2003 Brand-Type Shares

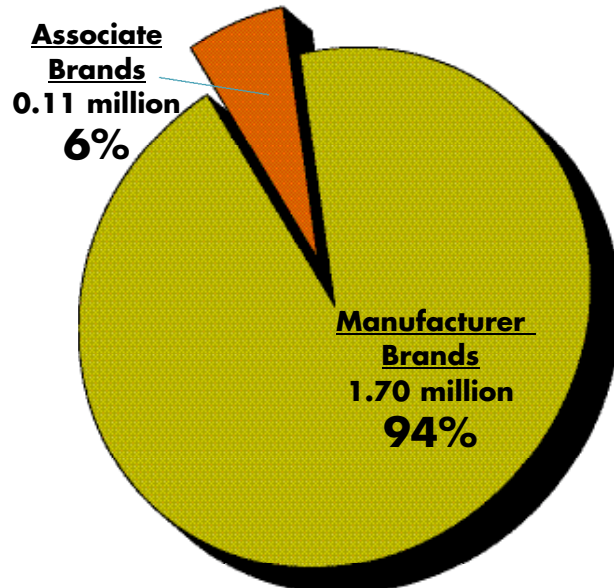
### LT-Metric

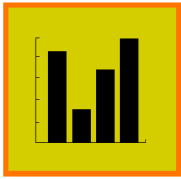
(OE & Replacement – 3.42 million units shipped)



### Medium Truck

(OE & Replacement – 1.81 million units shipped)

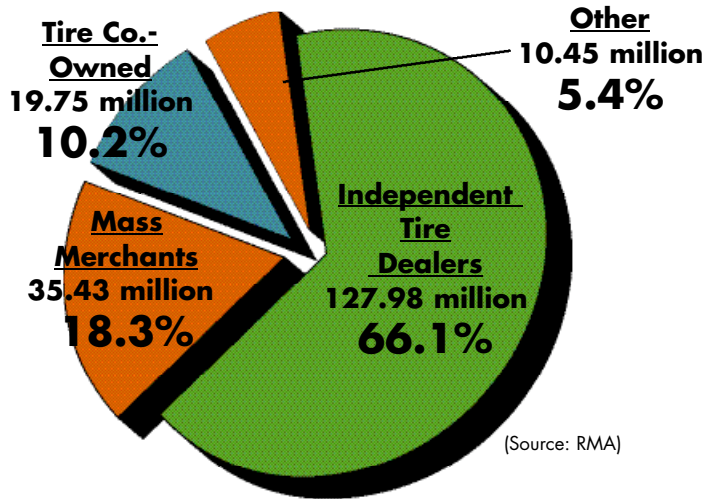




## U.S. 2003 Distribution Channel Shares

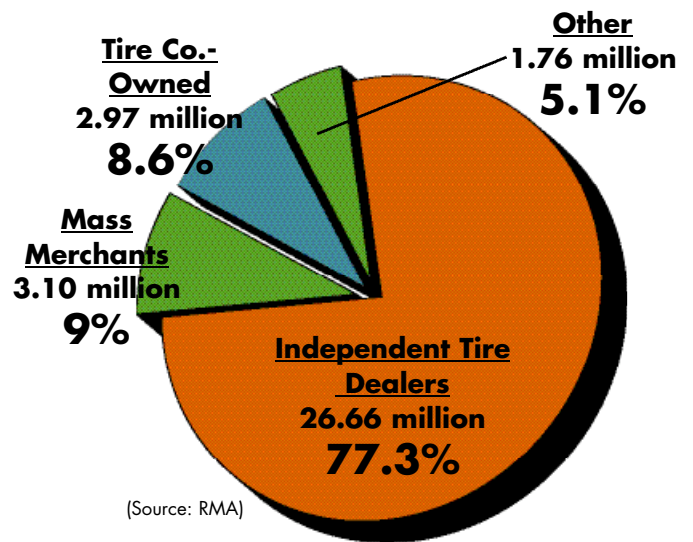
### P-Metric

(193.61 million replacement units shipped)



### LT-Metric

(34.49 million replacement units shipped)



**prevost**



*High quality components  
for your compressed air needs*

## Safety quick couplings Prevo.S

**THE QUICK COUPLING THAT  
PUTS SAFETY FIRST**  
 Easy one-handed connection  
 Simple 2-stage vented release  
 Durable impact resistant body  
 1-year warranty against leaks



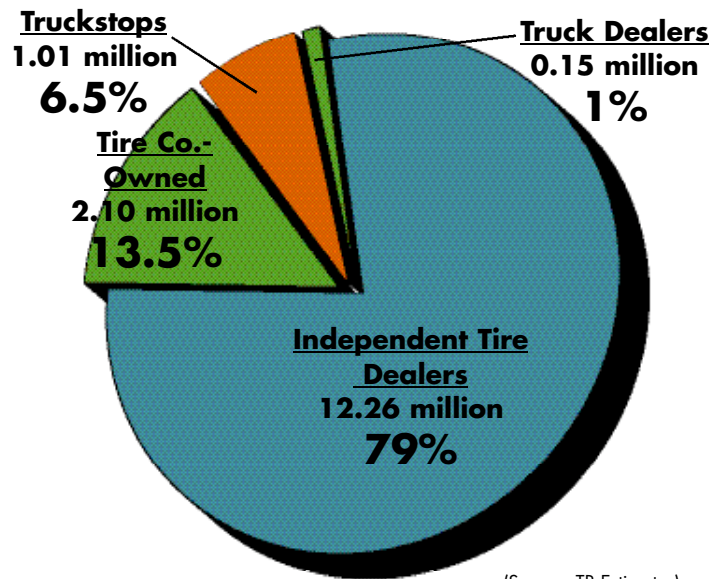


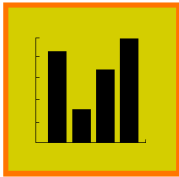


**Prevost Corporation** - PO Box 17708 - Greenville, SC 29606  
 (800) 488-4054 - (864) 284-6428 fax - [www.prevost-ltd.com](http://www.prevost-ltd.com)

### Medium Truck

(15.52 million replacement units shipped)





## Speed-Rated Tire Breakdown

### OE Market

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

<u>Year</u>	<u>H-Rated</u>	<u>V-Rated</u>	<u>Z-Rated</u>	<u>Other Speed Rated</u>
1999 .....	<u>7.3%</u> .....	<u>3.6%</u> .....	<u>0.85%</u> .....	<u>73.1%</u> .....
(61.00) .....	4.44 .....	2.21 .....	0.52 .....	44.61 .....
2000 .....	<u>9.7%</u> .....	<u>3.6%</u> .....	<u>0.80%</u> .....	<u>71.9%</u> .....
(60.19) .....	5.84 .....	2.19 .....	0.48 .....	43.29 .....
2001 .....	<u>10.4%</u> .....	<u>3.8%</u> .....	<u>1.0%</u> .....	<u>72.3%</u> .....
(54.56) .....	5.67 .....	2.09 .....	0.56 .....	39.46 .....
2002 .....	<u>9.7%</u> .....	<u>4.6%</u> .....	<u>1.6%</u> .....	<u>78.1%</u> .....
(57.32) .....	5.54 .....	2.62 .....	0.90 .....	44.80 .....
2003 .....	<u>8.58%</u> .....	<u>6.25%</u> .....	<u>2.02%</u> .....	<u>78.40%</u> .....
(54.54) .....	4.68 .....	3.41 .....	1.10 .....	42.76 .....

(Source: RMA)

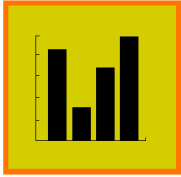
### Replacement Market

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

<u>Year</u>	<u>H-Rated</u>	<u>V-Rated</u>	<u>Z-Rated</u>	<u>Other Speed Rated</u>
1999 .....	<u>8.4%</u> .....	<u>1.6%</u> .....	<u>1.2%</u> .....	<u>59.2%</u> .....
(191.90) .....	16.04 .....	3.14 .....	2.31 .....	113.57 .....
2000 .....	<u>8.3%</u> .....	<u>1.8%</u> .....	<u>1.6%</u> .....	<u>61.0%</u> .....
(198.87) .....	16.60 .....	3.52 .....	3.18 .....	121.28 .....
2001 .....	<u>9.4%</u> .....	<u>2.0%</u> .....	<u>2.0%</u> .....	<u>62.2%</u> .....
(190.77) .....	18.00 .....	3.80 .....	3.78 .....	118.60 .....
2002 .....	<u>11.4%</u> .....	<u>2.4%</u> .....	<u>2.3%</u> .....	<u>59.4%</u> .....
(190.54) .....	21.72 .....	4.57 .....	4.38 .....	113.18 .....
2003 .....	<u>13.01%</u> .....	<u>2.88%</u> .....	<u>2.75%</u> .....	<u>58.20%</u> .....
(193.61) .....	25.19 .....	5.57 .....	5.33 .....	112.68 .....

(Source: RMA)





## Vehicle Sales, Registrations and Use

### U.S. Registrations

(millions of vehicles)

Year	Class 4-6		Class 7-8		Total Vehicles
	Cars	LT/SUVs	Trucks	Trucks	
1999	126.87	74.43	2.54	4.20	208.04
2000	127.72	77.56	2.65	4.34	212.28
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

(Source: AAIA)

### Canada Registrations

(millions of vehicles)

Year	Class 4-6		Class 7-8		Total Vehicles
	Cars	LT/SUVs	Trucks	Trucks	
1999	10.89	6.18	N/A	N/A	N/A
2000	10.68	6.42	N/A	N/A	N/A
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

(Source: AAIA, TR Estimates)

### 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	
1999	6.99	1.76	8.75	7.50	0.71	8.21	0.128	0.39	0.52	17.48
2000	6.94	2.07	9.01	7.62	0.78	8.40	0.128	0.33	0.46	17.86
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

(Source: AAIA)

### U.S. Miles Traveled By Vehicle Type

Total Miles Traveled  
(billions)

Average Annual Miles Traveled

Year	Class 4-6			Class 7-8		Total Miles	Class 4-6			Class 7-8	
	Cars	LT/SUVs	Trucks	Trucks	Trucks		Cars	LT/SUVs	Trucks	Trucks	
1994	1,416	765	61	109	109	2,358	10,759	12,156	12,491	64,783	
1995	1,438	790	63	116	116	2,423	11,203	12,018	12,482	68,083	
1996	1,470	817	64	119	119	2,482	11,330	11,811	12,167	68,075	
1997	1,503	851	67	125	125	2,560	11,581	12,115	12,637	69,601	
1998	1,550	868	68	128	128	2,625	11,754	12,173	11,861	64,265	
1999	1,569	901	70	132	132	2,691	11,848	11,957	12,199	65,260	
2000	1,600	923	71	135	135	2,747	11,976	11,672	11,897	64,399	
2001	1,628	943	72	137	137	2,781	11,831	11,204	12,702	63,404	
2002	1,659	966	76	139	139	2,856	12,203	11,365	13,430	60,898	
2003	1,678	981	79	142	142	2,880	12,452	11,823	13,761	63,417	

(Source: U.S. Dept. of Transportation, TR Estimates)