

TIRE BUSINESS

February 18, 2019

THE TIRE DEALER'S NEWSPAPER SINCE 1983

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TIRE BUSINESS

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THE TIRE DEALER'S NEWSPAPER SINCE 1983

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A message with inflection

Goodyear's Kramer urges industry to adapt, avoid complacency

By Don Detore

Tire Business Staff

GRAPEVINE, Texas — The evidence of permanent shifts that have occurred in the past few years in how we think or act — what Goodyear CEO, Chairman and President Rich Kramer calls an “inflection point” — is about as apparent as a flat tire.

Just look around the average household, he told those attending the tire maker's recent annual dealer gathering. That dinner sitting on the kitchen table might have been delivered by GrubHub or Uber Eats, both mobile food services. That couch in the living room? Perhaps that was ordered from online retail site Wayfair.

That comfortable mattress? It might have been shipped to your door, delivered in a small box by UPS after it was

ordered from one of the countless mattress-in-a-box retailers, there for you to try free for the first 100 days.

And that doesn't even account for those Amazon boxes you'll find throughout most houses, evidence of all the goods, from A to Z, that can be ordered from the online retail giant.

Each of those represents an inflection point, Mr. Kramer said, a widespread change in which some things never are the same. It can happen with a new product, a new technology or another business model.

“Sometimes, arguably most of the times, we don't recognize when an inflection point actually happens,” Mr. Kramer told nearly 2,500 Goodyear customers, associates and vendors during his annual keynote address at the Goodyear Customer Conference, held Jan. 27-29

See **Kramer**, page 34



Kramer

Goodyear photo

Commercial tires go high-tech

Goodyear rolls out e-commerce platform for operators, fleets

By Don Detore

Tire Business Staff

GRAPEVINE, Texas — Four years after rolling out an e-commerce tire-buying program for consumer tires, Goodyear is launching a similar platform for commercial tires.

The Akron-based tire maker announced the launch of the commercial e-commerce program at its Customer Conference, held Jan. 27-29 at the Gaylord Texan resort in Grapevine.

The program will allow U.S. owner-operators and small fleets to buy

Goodyear truck tires online and then schedule installations at participating Goodyear commercial tire dealerships.

Goodyear will roll out the program in three phases this year:

- Q1, the official announcement as well as the opportunity for businesses to enroll as participating dealers;

- Q2, launch of a pilot program; and

- Q3, full availability of the program, accessed exclusively through a portal on Goodyear's commercial truck tire website, www.goodyeartrucktires.com.

See **Goodyear**, page 34



Bingham

Tire Business photo by Don Detore

Big news for Bridgestone

Tire maker extends IndyCar pact, to build race tire plant in Akron

By Bruce Davis

Tire Business Staff

AKRON — Bridgestone Americas Inc. plans to build a dedicated race tire plant in Akron near its Americas Technical Center to replace a decades-old race-tire unit operating in the former Firestone Tire & Rubber Co. headquarters building.

The decision coincides with Bridgestone extending its Firestone race-tire supply contract with the IndyCar

Series for five additional seasons, through 2025, Cara Adams, chief engineer for Bridgestone Americas Motorsports, said at a news conference Feb. 6 at the tech center.

Bridgestone has been IndyCar's sole tire supplier since 2000.

The Bridgestone Advanced Tire Production Center will be built adjacent to an existing tire-testing facility located a few blocks east of the company's seven-year-old Americas

See **Bridgestone**, page 34



Cara Adams, chief engineer, Bridgestone Motorsports, and IndyCar veteran Al Unser Jr. speak at a news conference Feb. 6 at Bridgestone Americas' Technical Center in Akron.

Tire Business photo by Bruce Davis

In many respects, 2018 was 'boom' year for industry

By Bruce Davis

Tire Business staff

AKRON — By many business measures, 2018 was a record year for the tire and automotive service industries in North America, starting with record U.S. tire shipments and rebounding U.S. tire production.

After several years of marginal gains and drops in the passenger tire segment, shipments of car tires shot up 3.5 percent last to 216.7 million units, according to the U.S. Tire Manufacturers Association (USTMA) statistics for calendar year 2018.

That level of demand was met by both the domestic industry, which increased production 4.1 percent over 2017 to 126.3 million units, and imports, which were up nearly 3 percent over 2017 to an estimated 148.8 million units.

These and other salient industry trends are found in the 2019 Market Data Book, a 20-page section in this issue, starting on page 10.

The domestic output was the industry's highest since 2011, according to USTMA data, and is at least partially

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Get up-to-date information at the Tire Business website

<http://www.tirebusiness.com>

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Conti gains NASCAR deal

General secures second-tier series supply contracts

By Bruce Davis

Tire Business staff

DAYTONA BEACH, Fla. — NASCAR and Continental Tire the Americas' General Tire brand have struck a deal making General the exclusive tire supplier and official racing tire of NASCAR's K&N Pro Series, Pinty's Series and PEAK Mexico Series for the next few years.

These deals are in addition to General's status as race tire supplier for the ARCA Series and the NASCAR Whelen Euro Series and ties in with NASCAR's plan to merge the ARCA and K&N Pro Series in 2020.

Financial terms were not disclosed. General replaces Goodyear as tire supplier for the various second-tier NASCAR series, a change Goodyear said it "aligned to ... with NASCAR a long time ago."

Goodyear continues as the supplier to NASCAR's premier series — Monster Energy Cup Series; XFINITY Series; and Camping World Truck Series.

The new contracts also serve as replacements of sorts for the IMSA road-racing series contracts that Michelin Motorsport took over this year from Continental.

"General Tire is committed to promoting the NASCAR regional and international series across two continents and more than 11 countries with substantial investments across the NASCAR industry," Travis Roffler, director of marketing for General Tire, said.

"Our team works hard to provide competitive, action-packed racing each week for the fans, and we're thrilled to be expanding that across several more series. We look forward to working with the NASCAR industry to grow not only recognition of the General Tire name, but the various series as well."

The tires will be manufactured at Continental's Hoosier Racing Tire subsidiary's Lakeville, Ind., plant, where Hoosier has been building stock car tires for the ARCA Racing Series presented by Menards since 1995.

"The demand for NASCAR racing globally has never been stronger," Brandon Thompson, managing director of NASCAR touring series, said.

"General Tire's investment across the NASCAR regional and international series will authentically drive



General Tire has been chosen to supply tires to NASCAR's K&N Pro Series, Pinty's Series and PEAK Mexico Series.

brand awareness of not only the respective series but that of the drivers, teams and tracks. Our unique racing style will be highlighted and that's exciting."

The K&N Pro Series East kicked off the season for the NASCAR regional and international series Feb. 10 at Florida's New Smyrna Speedway; the K&N Pro Series West kicks off Feb. 28 at Las Vegas Motor Speedway.

The 13-race Pinty's Series opens May 19 at Canadian Tire Motorsport Park near Bowmanville, Ontario, and concludes Sept. 28 at Jukasa Motor Speedway near Hagersville, Ontario, and includes one U.S. race, Sept. 21 at New Hampshire Motor Speedway in Loudon, N.H.

NASCAR plans to integrate the K&N Pro Series and ARCA Racing Series it purchased in 2018 — starting in 2020, a move that will give drivers the opportunity to compete for four championships.

While the two series for late-model stock cars will continue to operate as separate entities for the 2019 season, they will operate under a new competition framework in 2020 with a model designed to preserve both series' historic short-track lineage, NASCAR said.

The new format will give drivers the opportunity to compete for four championships — NASCAR K&N Pro Series East, NASCAR K&N Pro Series West, ARCA Racing Elite Series presented by Menards and a new series NASCAR is calling "Stock Car Invitational."

Industry reps laud State of Union address

By Miles Moore

Senior Washington Reporter

WASHINGTON — Representatives of the tire, auto parts and allied industries reacted mostly favorably to President Trump's State of the Union address, especially to his calls for passage of legislation to fund infrastructure improvements.

However, they expressed some concern over tariffs, trade agreements and other issues such as Mr. Trump's call for legislation to establish paid family leave.

"Overall, our members are supportive of President Trump, and I think they supported the speech," Roy Littlefield III, CEO of the Tire Industry Association (TIA), said, "but in parts of that speech he sounded like a Democrat."

In the portion of the Feb. 5 speech, Mr. Trump called for "a great rebuilding of America's crumbling infrastructure.

"I know that Congress is eager to pass an infrastructure bill — and I am eager to work with you on legislation to deliver new and important infrastructure investment," he said.

Mr. Trump described the former North American Free Trade Agreement (NAFTA) as a "catastrophe" and said he had met working people in many states "whose dreams were shattered by NAFTA.

"Our new U.S.-Mexico-Canada Agreement — or USMCA — will replace NAFTA and deliver for American workers, bringing back American jobs," he said.



President Donald J. Trump addresses members of Congress during his Feb. 5 State of the Union address. Representatives from the tire and automotive service industries liked what he said.

Mr. Trump described his tariffs on \$250 billion of Chinese goods as a total success.

"Now our Treasury is receiving billions of dollars a month from a country that never gave us a dime," he said. Economists and trade groups point out, however, that U.S. consumers pay the tariffs, not foreign governments or enterprises.

"I have great respect for (Chinese President) Xi, and we are now working on a new trade deal with China," Mr. Trump said. "But it must include real, structural change to end unfair trade practices, reduce our chronic trade deficit and protect American jobs."

As expected, Mr. Trump called on Congress to approve the United States Reciprocal Trade Act, which

would give him the authority to instigate line-by-line tariffs on goods imported from countries that he determines have raised tariff or non-tariff barriers on U.S. goods.

"If another country places an unfair tariff on an American product, we can charge them the exact same tariff on the same product that they sell to us," he said.

Mr. Trump said he was proud to be the first president to include in his budget a plan for nationwide paid family leave "so that every new parent has the chance to bond with their newborn child."

Anne Forristall Luke, president and CEO of the U.S. Tire Manufacturers Association (USTMA), said

See *Industry*, page 32

U.S. Trade Commission changes opinion on TBR tires from China

By Miles Moore

Senior Washington Reporter

WASHINGTON — The U.S. International Trade Commission (ITC) has reversed its original opinion on truck and bus tires from China, voting 3-2 to find material injury against the domestic tire industry because of Chinese imports to the U.S.

The ITC filed its findings Jan. 30 with the U.S. Court of International Trade (CIT), which reversed the commission's original negative determination on Chinese truck and bus tires in a Nov. 1, 2018, ruling and remanded the case to the ITC for reconsideration.

The original ITC negative determination came down in February 2017. In April of that year, the United Steelworkers (USW) union — which had sought countervailing and antidumping duties against Chinese truck and bus tire importers — filed a complaint with the CIT, seeking judicial review.

The USW took issue with the ITC on four issues, and the CIT ruled in the union's favor on two: the commission's negative adverse price effects determination and its negative threat determination, both of which the union said were "not supported by substantial evidence."

In the filing with the CIT, the ITC said it now found that Chinese imports had "a significant adverse impact" on the U.S. truck and bus tire industry.

"The subject tires undersold the domestic product by significant and increasing margins of underselling and depressed prices, preventing the domestic industry from increasing its revenues commensurate with growing demand," the commission said in the court document.

"Tier and brand premiums cannot explain price underselling in instances in which the subject and Chinese tires overlap," the ITC said. "Both domestic and Chinese tires competed directly and to a significant degree in Tiers 2 and 3, the tiers which accounted for a large

portion of total shipments."

ITC Chairman David S. Johanson and Commissioner Meredith M. Broadbent dissented from the majority, continuing to find that the domestic tire industry did not face material injury because of Chinese imports.

USW International Secretary-Treasurer Stan Johnson praised the new ITC determination.

"The ITC finally acknowledged what our members have known since we filed this case in January 2016: that illegally subsidized bus and truck tires coming to our country from China hurt domestic manufacturing and good-paying jobs," Mr. Johnson said in a statement.

The retread industry, which faces fierce competition from imports of new Chinese tires, was pleased with the new ITC determination.

"This is good news for the retread industry, but we still have a ways to go before a final determination is made," the Tire Retread & Repair Information Bureau said.

Interested parties will have the opportunity to comment on the redetermination and reply to those comments. If the CIT upholds the ITC's new determination, the Commerce Department will issue orders to Customs and Border Protection to collect countervailing and antidumping duties against Chinese truck and bus tire imports.

In January 2017, Commerce issued final countervailing duty levels of 38.61 percent against Double Coin Holdings Ltd., 65.48 percent against Guizhou Tire Co. Ltd. and 52.04 percent against Prinx Changshan (Shandong) Tire Co. Ltd. and all other importers.

In antidumping duties, Commerce found margins of 9 percent against Prinx Chengshan and 22.57 percent against Double Coin, Guizhou and all others.

According to Commerce data, the average declared Customs value of a Chinese truck/bus tire in 2017 was \$109.59, or 28.4 percent below the average for all imports.

Nine independents join Tire Pros network

HUNTERVILLE, N.C. — Nine independent tire dealers in nine states have joined American Tire Distributors Inc.'s Tire Pros marketing group over the past couple of months, ATD said recently.

The dealerships, located in California, Idaho, Indiana, Louisiana, Oregon, Tennessee, Texas, Utah and Virginia, join a network of more than 640 Tire Pros locations in 45 states.

Jesse Wickel of Bowers Tire Pros in Burley, Idaho, said he and his father have been farming Idaho's Magic Valley for a combined 60 years and "are bringing that same family-oriented approach to the tire business."

Robert Landry of Service Tire and Auto of Lake Charles in South Lake Charles, La., said he and his business partner have been serving his community for two decades.

"Our customers want simple, honest service and a dependable product with a hassle-free guarantee," he said. "That's what Tire Pros allows us to deliver, and we're fortunate to have a national network of partners committed to our success."

Other new franchise locations are:

- El Cajon Tire Pros in El Cajon, Calif., owned by Nathan Clark and family;
- Auto Doc Tire Pros in Greenville,

Texas, owned by Tareq Nasrallah;

- South Coast Tire Pros in Bandon, Ore., owned by Samuel and Kelly Basey;
- Jed's Tire Pros in Layton, Utah, owned by Jed Florence;
- Kaiser Tire Pros in New Albany, Ind., owned by Shaun McDaniel and Kevin Smith;

and

- 301 Auto Repair in Mechanicsville, Va., owned by Michael Lippa and family.

Ron Sinclair, president of Tire Pros and senior vice president of retail strategy and partnerships for ATD, said each new franchisee is committed to delivering the best customer service experience.

"We couldn't be more proud to add them to our growing network of franchisees, and we look forward to working with them to help their businesses flourish."

Tire Pros said it expects continued franchise growth in the months ahead.

Last year, Tire Pros unveiled a marketing campaign that features an array of marketing assets and is based on two words: Hassle-free. Guaranteed. In addition, Tire Pros rolled out the Tire Pros playbook — a manual that offers direction and policies on how to operate a Tire Pros facility.

Goodyear ends 2018 with lower income

AKRON — Goodyear suffered double-digit decreases in segment operating income for both 2018 and the fourth quarter, reflecting higher raw material costs and weaker results from other tire-related businesses, among other factors.

Segment operating income for the year fell 18 percent to \$1.3 billion, compared with 2017. Goodyear said unfavorable foreign currency translation, which were partially offset by net cost savings and improved overhead

absorption, affected the results.

Goodyear's 2018 sales edged up 1 percent to \$15.5 billion, driven by improvements in price/mix partially offset by unfavorable foreign currency translation.

Goodyear reported tire unit volumes of 159.2 million, unchanged from the prior year, while replacement tire shipments edged up 1 percent. Goodyear said growth in Europe was offset by weakness in



Brazil and China.

Goodyear's net income for the year more than doubled to \$693 million as it included a net gain after-tax and minority interest of \$207 million resulting from the TireHub transaction, net of transaction costs. Goodyear's net income in 2017 included net charges after minority interest of \$292 million resulting

See *Goodyear*, page 32

Michelin cites raw materials costs for dip in '18 earnings

PARIS — Group Michelin's fiscal 2018 segment operating income fell 1.2 percent on a slight increase in sales as shifting currency exchange rates and rising raw materials costs ate into potential earnings gains.

Segment operating income of \$3.27 billion was driven primarily by improvements in the company's commercial and specialty tire businesses, which offset a double-digit earnings decline in the automotive

and related business unit, Michelin said.

Net sales rose 0.3 percent to nearly \$26 billion. Michelin said sales at constant exchange rates would have risen 4.1 percent. Unit sales volume was up just 0.9 percent. Sales revenue in North America fell 2.9 percent to \$9.1 billion.

Commenting on the results, outgoing CEO Jean-Dominique Senard said, "Michelin demonstrated its

See *Michelin*, page 32

Sumitomo suffers earnings slump

KOBE, Japan — Sumitomo Rubber Industries Ltd. (SRI) suffered double-digit drops in operating and net income for fiscal 2018, declines the company pinned on foreign-exchange losses and an impairment loss related to its South African subsidiary.

Operating income for the period dropped 15.3 percent to \$519.6 million on 1.9-percent higher sales of \$8.13 billion.

The results are in line with a forecast SRI published along with its third-quarter earnings report, when the company cited rising raw materials and fixed costs, eroding prices and an unfavorable price/mix component as key factors in adjusting the fourth quarter outlook.

SRI cited the "deterioration in the sales environment" in South Africa for its decision to record an impairment loss on goodwill related to its Sumitomo Rubber South Africa (Pty.) Ltd., where it added capacity for radial truck and bus tires last year at the Ladysmith fac-

tory it acquired from Apollo Tyres Ltd. in 2013.

Net income fell 22.8 percent to \$329.5 million.

For fiscal 2019, SRI is forecasting a further erosion of earnings on a slight increase in sales. Specifically, the company sees operating income

falling about 5.5 percent for the year, with a second-half improvement offsetting to a large degree a nearly 45-percent drop in the first half.

Business profit for SRI's tire business fell 12.3 percent to \$465.3 million on 1.5-percent higher sales revenue of \$6.98 billion.

OE sales in international markets improved, SRI said, due to expanded business in Europe, North America and emerging countries.

Overall sales in North America — comprising both tire and non-tire businesses — fell 3.4 percent to \$1.35 billion.



SUMITOMO
RUBBER INDUSTRIES

Icahn completes RPM Auto purchase

JACKSONVILLE, Fla. — Icahn Automotive Group L.L.C. has completed its purchase of RPM Automotive Inc., a Jacksonville-based auto repair chain with 10 outlets operating more than 100 service bays throughout northeastern Florida.

The acquisition — announced originally in mid-December — expands Icahn's reach in the Jacksonville area, where it already operates eight Pep Boys-branded retail stores. In all, there are more than 125 Pep Boys outlets in Florida.

Icahn, which operates auto repair and maintenance providers Pep Boys, AAMCO and Precision Tune Auto Care, said RPM Automotive will retain its name, its leadership team and ASE-certified technicians.

The first RPM Automotive location opened in 2000. Seven of the outlets are in Jacksonville proper; the others are in Fleming Island, Jacksonville Beach and St. Johns.

Nokian boosts N.A. sales

NOKIA, Finland — Nokian Tyres P.L.C.'s fiscal 2018 operating income edged up 1.9 percent to \$439.2 million on 1.5-percent higher sales of \$1.88 billion.

Both earnings and sales were impacted negatively by currency valuation swings, Nokian said, and business slowed in the fourth quarter, particularly in Central Europe.

Net earnings jumped 33.3 percent to nearly \$348 million from a 2017 figure that was impacted negatively by one-time tax and interest charges.



Looking forward, Nokian management said it is sticking by its financial targets for 2019-21 to grow faster than the market, maintain healthy profitability (operating at or above 22 percent) and issue dividends above 50 percent of net earnings.

For the fiscal year, Nokian cited encouraging growth in Russia and North America, which offset the negative impact of lower car sales in Sweden and Norway. Revenue in North America grew 13.1 percent last year, to \$228.8 million.

Nokian expects to double sales in North America by 2023, to about \$500 million, to coincide with the ramping up to full-scale capacity at its plant under construction in Dayton, Tenn.

OBITUARY

Big O Tire co-founder Norm Affleck

DENVER — Norman L. "Norm" Affleck, a founding member and first president of Big O Tires, died Feb. 7. He was 95.

During his 22-year tenure, he recruited many dealers to build the Big O franchise network, helped Big O become a leader in retreading, developed a unique warranty and instituted the private brand concept.

During World War II, Mr. Affleck flew B29 bombers for the U.S. Air Force, participating in 32 missions. When he returned to the U.S. in 1945, he started his career in the tire business as an O.K. Rubber Welder store owner.

By 1960 he had six stores in southern



Affleck

Colorado and New Mexico. In 1962 he and a group of other O.K. Rubber franchisees formed Big O Tire Dealers Inc.

He served as Big O president from 1962 until his retirement in 1984. TBC Corp. acquired Big O in 1996.

For three years he flew his own plane around the country to meet with independent dealers and sell the Big O Tires concept, according to TBC.

In 1965 he developed and implemented the speed lane concept, creating a drive-through bay at his Denver store.

"The result was an immediate improvement in customer satisfaction and increased productivity and store profitability," TBC said.

He was instrumental in establishing the Big O private tire brand, introduced in 1974.

"Norm played a key role in developing many of the programs that make Big

O Tires unique. His own experience in the tire business taught him that the best way to make money was to have an exclusive product, program or service, and he worked passionately on all of these," said John Kairys, TBC general manager and vice president.

"He always had dealer success and profitability in his every thought — literally talking about this until his last days."

After his retirement, Mr. Affleck continued to contribute to the tire industry through retreading and recycling efforts and consulting, according to TBC.

He was inducted into the Big O Hall of Fame in 1993 and into the Tire Industry Association's Tire Industry Hall of Fame in 2007.

Mr. Affleck is survived by his wife Elva and daughter Kimberly Jo.

NEWS IN BRIEF

Labor Secretary visits Conti site

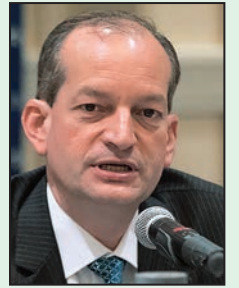
CLINTON, Miss. — U.S. Labor Secretary Alexander Acosta recently visited the employee training center established by Continental Tire the Americas in Clinton.

Mr. Acosta toured the center, which Conti opened in November 2018 to train employees for its Clinton truck tire plant, which is under construction nearby.

His visit coincided with the announcement that the Occupational Safety and Health Administration had signed a "strategic partnership" with Mississippi State University's Center for Continuing Education Industrial Health & Safety Program and Brasfield & Gorrie L.L.C. to promote worker safety and health at the Clinton plant.

The partnership seeks to prevent injuries and exposure to hazards during the construction of the 750,000-sq.-ft. facility.

Continental plans to open the plant in January 2020 with 400 employees and an initial capacity of 750,000 truck and bus tires annually. By 2028, Conti expects the facility to reach its full employment of 2,500.



Acosta

Indy Tire buys Frank Anderson Tire

INDIANAPOLIS — Indy Tire Centers Inc., dba Best-One of Indy, has acquired Frank Anderson Tire Co. in Columbus, Ind.

Owner Frank Anderson, who is retiring, partnered with the Zurcher family to open the dealership in 1971, and it became a member of the Best-One Tire & Service dealership network.

Best-One of Indy also is a network member and operates nine locations in the Indianapolis market. The dealership changed its stores' signage from Indy Tire Centers last March.

Tire Kingdom opens in Fla. Panhandle

PANAMA CITY, Fla. — TBC Corp. has opened a Tire Kingdom Service Center in Panama City, its first in the Florida Panhandle.

The store, in a converted Mad Hatter Muffler & Auto Center location, has six service bays.

The expansion opens a new territory for Tire Kingdom, as the next closest Tire Kingdom stores are in Tallahassee, Fla., 95 miles east of Panama City.

Bandag on/off-road tread debuts

NASHVILLE, Tenn. — Bridgestone Americas Inc. has added an on/off-road drive-axle tread design, the BLSS, to its line of Bandag-brand precure tread rubber products.

The Bandag BLSS tread is engineered for the drive position with a tread compound designed to resist cutting and chipping in order to increase tread life while offering a powerful grip in severe service applications, the company said.

Key features of the retread are:

- A full 32/32nd-inch tread depth to provide longer wear;
- A stone rejection technology for added durability; and
- A specialized compound to decrease chipping and cutting in tough conditions.

Bridgestone is offering the BLSS in seven sizes, ranging from 200mm wide to 270mm wide.

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INFLATION PRESSURE

Opinion

Disruptions or not, tire industry rolls on

While it is important to consider and understand all of the white noise surrounding today's tire and automotive service industries — particularly all of the disruptions, or inflection points, so to speak, over the past decade — there is one thought expressed recently by Goodyear CEO, Chairman and President Rich Kramer that perhaps everyone should remember.

"All vehicles, owned or shared, with a driver or autonomous, with electric motor or gas combustion engine, they all need tires now, and they're going to need them tomorrow," Mr. Kramer told Goodyear dealers during the company's recent Customer Conference.

Then he said this: "Our business is strong. Keep that in mind. Never

lose sight of that."

So despite what some have predicted about transportation in the future — Baby Boomers will remember the flying cars that were so prevalent in the 1960s animated TV show, *The Jetsons* — the vehicles of today, tomorrow and beyond will need tires, both as original equipment and replacement fitments.

That is not to say, however, that dealers should be ignoring the changes swirling in the industry. We've encouraged dealers repeatedly to keep abreast of these disruptions and figure out what is best for their businesses moving forward.

Mr. Kramer laid out an array of disruptions in the industry during

his recent talk to Goodyear dealers.

He labeled them "inflection points," defined as a widespread change where some things never are the same. It can happen with a new product, a new technology, another business model.

Some inflection points, Mr. Kramer maintained, aren't apparent until they are. He cited the Great Recession of 2008 as an example: The inflection didn't occur when banks started going bankrupt, he maintained, but when the housing bubble burst earlier, among other factors.

He pointed out several inflection points that are critical for dealers.

Among them is the decision of the Big 3 Detroit auto makers to all but discontinue production of tradi-

tional sedans to open capacity for the more profitable and better-selling light trucks, SUVs and CUVs.

"For 100 years, the car has been the backbone of the auto industry ... sort of the symbol of the American dream, probably for many of us in this room who have their own first car," Mr. Kramer said. "Now those cars, those sedans are no longer going to be in production.

"That's an inflection point, and nothing in the car industry is ever going to be the same," he said.

As for the 2008 recession, the inflection point occurred with low interest rates, the onset of sub-prime mortgages and the housing bubble.

Another inflection point, he said, is how vehicles are being used. The success of ride-sharing services could bring down the per-mile cost of commuting to 50 cents or less, he said, from \$2 now.

Meanwhile, customers demand more convenience, while upstart competitors look to reinvent the wheel ... or more specifically, the tire and how it is designed.

Those are disruptions tire dealers should react to accordingly, he said.

The bottom line, though, he said, is that tires are going to remain integral to a vehicle. "There is no substitution out there for a tire and a wheel.

"Even if we're at an inflection point today, our business is really strong," Mr. Kramer said, "... and it's going to be for a long, long time."

Good advice to heed as tire dealers navigate a changing tire and service world.

TIRE BUSINESS OUR VIEW



FORUM

EVs will come with an economic cost

By Keith Crain

Amid the euphoria surrounding electric vehicles (EVs), I have wondered what would happen to the huge economic structure that has been built around our interstate highway system if EVs grow in popularity.

Thousands of gasoline stations that dot our highways could face



Crain

closure. And how would other businesses along the routes — motels and drive-through fast-food stores, for instance — be affected?

Certainly, we'd have lots of businesses that not only would offer charging stations but many other amenities for EV users.

But would we also have to convert our highways to pay-as-you-go toll roads?

Without the enormous amount of tax revenue collected on the sale of gasoline, we'd have to come up with another system to raise the billions of dollars needed to build and maintain

roads, bridges and other infrastructure.

I suppose we could use a licensing setup not unlike the British have adopted to support their noncommercial TV system — consumers buy a license that allows them to install or use TV receiving equipment.

Already, many states, including ones that have zero-emission vehicle mandates, are recognizing this gap and imposing higher annual registration fees and surcharges on EVs and hybrids in lieu of gasoline taxes. But there's still nothing similar in place at the federal level.

At some point, policymakers will have to replace the tax on gasoline and

diesel with a more equitable funding mechanism so we can continue to enjoy the infrastructure that we have today.

Most EV fans likely will be unhappy about losing the tax subsidy attached to the purchase of the vehicles.

I also expect them to be unhappy when they face heftier payments every year to support the highway system.

Mr. Crain is chairman of Crain Communications Inc., parent company of Tire Business, and is editor-in-chief of Detroit-based Automotive News.

Letters to the Editor

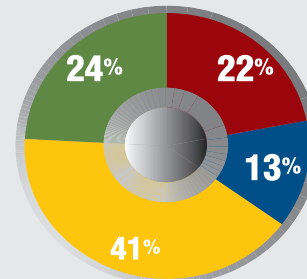
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Letters must be signed and may be edited for length and clarity. Please include a daytime phone number for verification purposes. Letters also may be published on *TB's* website: www.tirebusiness.com.

TIRE BUSINESS Online Poll

Question: What kind of investments do you plan to make this year?

- Adding more employees.
- Upgrading software/hardware.
- Upgrading our equipment and/or facilities.
- Training for employees.



Total Votes: 46 Poll dates: Jan. 31 - Feb. 14, 2019

TIRE BUSINESS/Michael McCrady

TIRE BUSINESS

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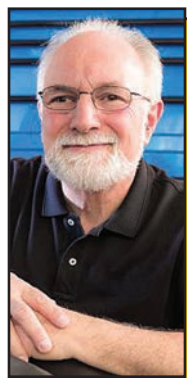
Taking a look at practical uses of silicone paste

By Dan Marinucci

Silicone paste helps electrical connections withstand the elements, thereby minimizing the risk of weather-related electrical comebacks.

Silicone paste, also known as dielectric grease, has applications on components such as brake parts, suspension bushings, spark plug boots and ignition terminals. But service personnel may underestimate its value on basic electrical connections.

I began using silicone paste on various electrical connections back in 1977. I happened to interview an engineer who described its ability to protect terminals from rain, snow, road splash, road salt, humidity and battery fumes.



Dan Marinucci is a freelance automotive service writer and former editor of two automotive service magazines.

What's more, silicone paste won't liquefy or melt in a hot engine compartment.

Among the locations where I have tried silicone paste are battery terminals, firewall harness connectors, various lighting connectors and trailer harness terminals — not to mention computer, sensor and actuator connectors.

The engineer said the paste would not restrict the flow of electricity through a healthy electrical connection. Numerous times I have tested electrical connections before and after treating the terminals with the paste.

Indeed, I have never measured any increase in the voltage drop across an electrical connection after treating its terminals.

The silicone paste protects an electrical connection by coating its terminals, filling the tiny voids or air gaps between those terminals. To be fair, experience has shown that many electrical connectors withstand years of exposure to all the elements.

But suppose a technician has to unplug that connection during a repair. Applying a film of silicone paste to the connector's terminals and its internal, protective seal does two things.

First, it eases the task of snapping the two halves of that connector back together without disturbing or damaging this vital seal.

Second, the paste provides additional weather protection by filling those air gaps within the terminals and imperfections in the connector's protective seal.

Sometimes carelessness causes corroded terminals inside an electrical connection: A discarded, cracked or misshapen connector seal has allowed road splash to penetrate the connector and its terminals.

In many cases, I have cleaned these terminals with the appropriate chemical. Then I have carefully filled

The silicone paste protects an electrical connection by coating its terminals, filling the tiny voids or air gaps between those terminals.

that connector with silicone paste so that road splash can't contaminate and corrode its terminals again.

Later, firsthand checks of this car confirmed that this connection delivered trouble-free service for years afterward — despite the missing or damaged connector seal.

Last but not least, the silicone paste has performed beautifully inside common battery terminals.

I have cleaned the terminals and applied a film of dielectric grease to the battery post or side-terminal mounting "pad" on the side of the

battery case. Then I connected the battery cable to the terminal.

I have experimented with dielectric grease inside countless battery terminals. When I disconnected the battery cables five years later — during battery replacement — the battery terminals were still shiny and clean.

Don't overlook silicone paste's value to electrical connections.

Dan can be reached via e-mail at tirebusiness@crain.com. His previous columns are available at www.tirebusiness.com.



3M photos



Tire Business photo by Dan Marinucci

One popular example of silicone paste is 3M's No. 08946, which comes in a brush-top container.

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AUTOMOTIVE SERVICE

Car Care Council extends consumer education effort to Canada, Mexico

BETHESDA, Md. — The Auto Care Association (ACA)'s Car Care Council has created the Car Care Council North America (CCCNA) to expand its "Be Car Care Aware" consumer education campaign beyond the U.S. to Canada and Mexico.

The CCCNA involves the Automotive Industries Association of Canada (AIA Canada) and the Asociación Nacional de Representantes, Importadores y Distribuidores de Refacciones y Accesorios para Automóviles, A.C. (ARIDRA) in Mexico.

"Car Care Council North America builds on the positive reputation and image of the current Car Care Council that has been funded and directed by the Auto Care Association for nearly 20 years as a credible source of information about the benefits of vehicle maintenance, care and repair," Car Care Council Executive Director Rich White said.

The key goals of CCCNA include:

- Structuring CCCNA to ensure a level of autonomy to accommodate country-specific cultural, language and other unique needs for each of the U.S., Canada and Mexico organizations, while centralizing the organization under the umbrella of the U.S. Car Care Council to leverage economies of scale.
- Creating an advisory group with representatives from each association to help guide CCCNA to ensure that the needs of their respective members, motoring public and industries are being met.
- Launching a central web portal where consumers, industry professionals and the media can locate and download car care content in English, Spanish and French from each of the U.S., Canada and Mexico websites.

- Increasing the number of service and repair businesses throughout North America participating in the "Be Car Care Aware" consumer education campaign by providing them access to communications materials, marketing tools and other helpful resources.

- Substantially increasing the number of consumers reached with information about proper vehicle care and maintenance on behalf of the three associations' respective members and industries as a whole.

"As everyone working in the global auto care industry knows, proper vehicle maintenance is a universal issue and a challenge that has no borders," ACA President and CEO Bill Hanvey said. "Expanding the Car Care Council initiatives in Canada and Mexico is a logical next step in educating consumers about the benefits of regular vehicle upkeep."

ARIDRA President Alejandro Calderón added: "The creation of the expanded council seeks the unification of services in the United States, Canada and Mexico, to ensure that vehicles have preventive and not corrective maintenance. We intend to create consumer awareness to keep the vehicles in optimal condition."

AIA Canada President Jean-François Champagne said: "The North American automotive aftermarket industry is more connected than ever before. Establishing the CCCNA as an organization that reaches across borders to provide extensive consumer education on vehicle care and maintenance in all three countries together is a clear reflection of that interconnectivity."

VSG adds drive-over tread scanner to auto service equipment portfolio

MADISON, Ind. — Vehicle Service Group's (VSG) Rotary business is adding a drive-over tread-scanning device, the TreadScan 2700, to its growing portfolio of auto service equipment.

The new product produces a laser-generated scan of the customer's tire tread profiles instantly, providing the shop's technicians with a visual image to show customers the condition of their tires and to recommend tire replacement and/or alignment if warranted.

"Many people are driving around on tires that need to be replaced without realizing it," according to Jeff Vervoort, national sales manager of wheel service equipment for VSG.

"Uneven tire tread can indicate the need for new tires, a wheel alignment or suspension analysis. Our new TreadScan 2700 helps shops keep their customers safe by checking the condition of their tires in just a few seconds, and quickly pays for itself through increased sales of tires, alignment and suspension work."

As vehicles drive over the reader, a built-in laser measures the tread on each tire and a camera photographs them. The data and photos are transmitted to the computer and a tread report is generated, which can be printed to review with the customer as well as stored for future reference.

The document includes a detailed analysis of the tire tread, including measurements, di-

mensions and diagrams. Technicians or service advisers then can analyze the data and make recommendations to the customer.

Rotary is offering two versions of the new device. The base model includes a robust drive-over tread scanner and a mobile cabinet with computer and printer. The scanner is constructed of galvanized steel for durability and reduced maintenance. It has adjustable ramps to accommodate any car or light truck weighing up to 16,000 pounds and can be installed in any bay, either mounted to the floor or recessed per shop preference.

TreadScan 2700 also can be integrated with Rotary alignment equipment, VSG said. In this configuration, the tread scanner is installed in front of the alignment rack so that every car drives over it on the way to the rack. The software can be installed in the computer used for alignments, cost-effectively eliminating the need for another computer, printer and cabinet.

Known in the past predominantly for its vehicle lifts, Rotary branched into wheel service equipment, including tire changers, wheel balancers and alignment equipment, in 2017. This product-range extension coincided with VSG's acquisition of Ravaglioli S.p.A. Group, an Italy-based automotive service equipment and vehicle lift manufacturer, in 2016.



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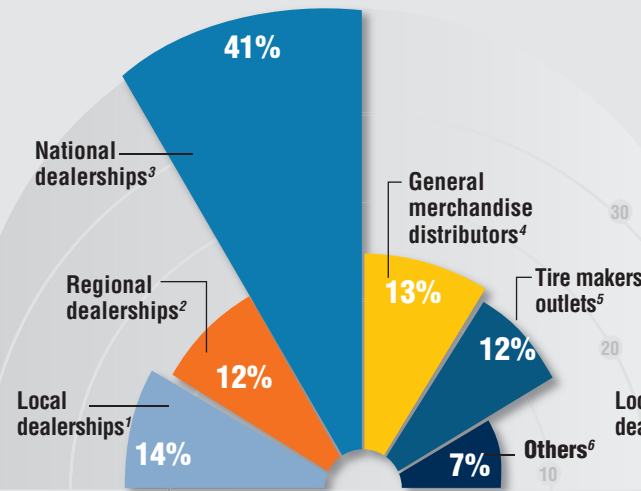
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TIRE BUSINESS

Market Data Book

North American tire market profile

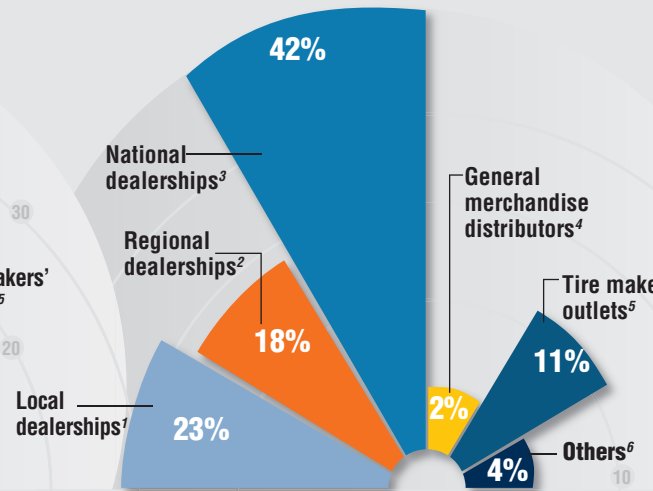
U.S. replacement passenger tire shipments from manufacturers



¹**Local dealerships:** Independents with fewer than 10 outlets in a single regional distribution area.
²**Regional dealerships:** Independents with 10 to 40 outlets in at least two regions.
³**National dealerships:** Independents with more than 40 outlets in three or more regions.

Source: U.S. Tire Manufacturers Association's preliminary 2018 data.

Manufacturers' shipments of U.S. replacement light truck tires*

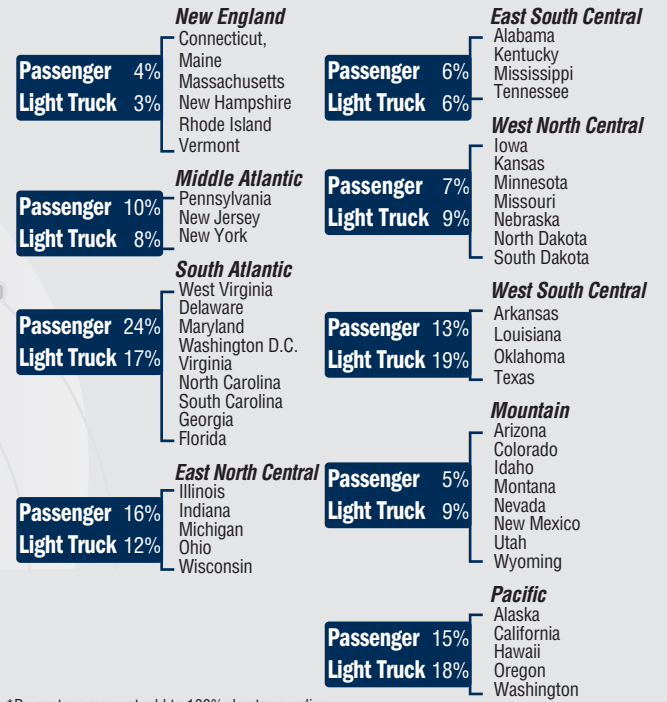


⁴**General merchandise distributors:** Mass merchandisers, wholesale clubs, etc.
⁵**Tire makers' outlets:** Those operated by the manufacturers using various names and store formats.
⁶**Others:** Service stations, garages, car dealerships, etc.

*Percentages may not add to 100% due to rounding.

Tire shipments

by U.S. region*



*Percentage may not add to 100% due to rounding.
 Source: U.S. Tire Manufacturers Association's preliminary 2018 data.

TIRE BUSINESS graphics by Michael McCrady

Top North American Retailers

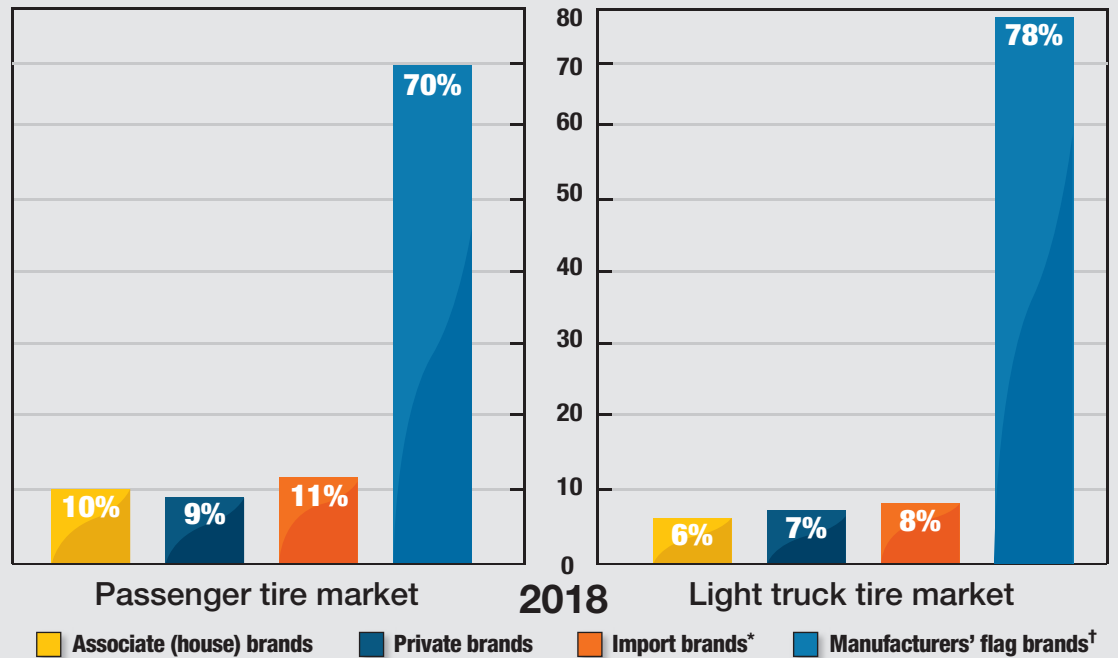
(2017 retail sales of tires & related automotive services)

Company / Chain	Sales (\$ millions)	No. of outlets (year-end 2018)
Discount Tire/America's Tire ¹	\$4,840	1,020
Bridgestone Americas ²	\$4,500*	2,222
TBC Corp. ³	\$3,000*	731
Walmart Inc. ⁴	\$2,960*	3,200+
Icahn Automotive / Pep Boys ⁵	\$2,670*	1,022
Les Schwab Tire Centers	\$1,573	421
Monro Inc. ⁶	\$1,128	1,184
Quick Lane Tire & Auto Centers ⁷	\$900*	868
Costco Wholesale Corp. ⁸	\$855*	528
Big O Tires network ³	\$800*	430+
Sears Holdings Corp. ⁹	\$800*	200
Mavis Discount ¹⁰	\$775*	649
Midas International ³	\$750*	971
Canadian Tire Corp. [#]	\$630*	501
Goodyear ^{11,12}	\$600*	569
Point S Tire & Auto ¹³	\$550*	400+
4 Wheel Parts	\$545*	84
Kal Tire [#]	\$475*	209
Belle Tire Distributors	\$350	100
Fountain Tire Corp. ^{12 #}	\$230	160
Best One Tire & Service	\$200	117
Sullivan Tire Co.	\$150	71
Dunlap & Kyle Co. Inc.	\$140	54
A.T.V. Inc.	\$128	113
Rent-a-Wheel / Rent-A-Tire	\$120	124
Dobbs Tire & Auto Centers	\$110*	40
Graham Tire Co.	\$76	35

* estimated # sales translated from Canadian \$
 1 — Discount Tire's sales include revenue from DiscountTire.com
 2 — Estimated sales for Firestone Complete Car Care, Tires Plus and Wheel Works.
 Bridgestone also operates 200+ GCR and TDS stores in the U.S. and 39 GCR stores in Canada that primarily are commercial, but which also do a measurable amount of retail/consumer business.
 3 — Collective sales estimate for TBC's National Tire & Battery, Merchant's Tire and Tire Kingdom stores; TBC also franchises 440+ Big O Tires outlets in the U.S. and 35 in Canada, and 970+ Midas Intl. outlets in the U.S.
 4 — Estimated tire and auto service sales for Walmart and Sam's Club locations in the U.S. and Canada
 5 — Represents 'service center' revenue, which includes tires and automotive service; excludes \$1.22 billion in retail sales of automotive parts to do-it-yourself customers
 6 — Total corporate sales; tires represent 49% and auto maintenance/brakes/undecar 51%
 7 — Collective sales figure for Quick Lane network in the U.S. and Canada; stores are independently owned by Ford/Lincoln dealers
 8 — No. of Costco outlets with tire service; includes Puerto Rico
 9 — Sears is closing 34 more stores in Q1 2019
 10 — Proforma sales data for Mavis, which acquired Kauffman Tire's retail business -- 69 stores/\$114M in sales -- in January 2018 and Express Oil Change/Tire Engineers -- 480 stores/--- in February 2018
 11 — Estimated sales for Goodyear's U.S. retail network, including Just Tires
 12 — Goodyear is 50% owner of Fountain Tire
 13 — Estimated collective sales for the 200+ Point S outlets in the U.S. and 200+ in Canada

U.S. replacement market brand shares

(Tire Business estimates)



Based on data from U.S. Tire Manufacturers Association; U.S. Dept. of Commerce; etc.
 *Flag brands of offshore firms with no U.S. manufacturing presence. [†]Companies with U.S. manufacturing base.

TIRE BUSINESS graphics by Michael McCrady



Vehicle mileage/costs

Miles traveled - 2018*
 U.S. total 3.22 trillion

Car ownership costs per mile¹

(based on 15,000 miles per year)

2018	59.0 cents
2017	56.5 cents
2016	57.0 cents
2015	58.0 cents
2014	59.2 cents
2013	60.8 cents
2012	59.6 cents
2010	56.6 cents
2005	56.1 cents
2000	49.1 cents
1995	41.2 cents

Car maintenance costs per mile¹

(based on 15,000 miles per year)

2018 ²	8.2 cents
2017 ²	7.9 cents
2016	5.3 cents
2015	5.1 cents
2014	5.1 cents
2013	5.0 cents
2012	4.2 cents
2010	4.5 cents
2005	5.3 cents
2000	3.6 cents
1995	2.6 cents

Operating cost/mile³

Small sedan	15.26 cents
Medium sedan	17.76 cents
Large sedan	20.99 cents
Minivan	20.10 cents
Small SUV	17.57 cents
Medium SUV	21.09 cents
1/2 Ton Pickup	23.18 cents
Hybrid	13.19 cents
EV	11.28 cents
Average	19.26 cents

3 - AAA data; maintenance, repair, tires & fuel

* U.S. Department of Transportation ¹ American Automobile Association ² Maintenance, repair and tires

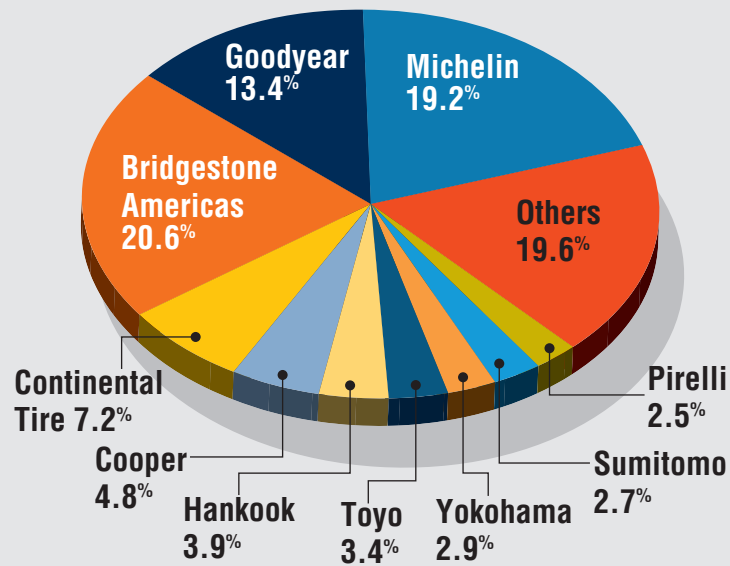
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Market Data Book

Tire Market Facts

North American market leaders

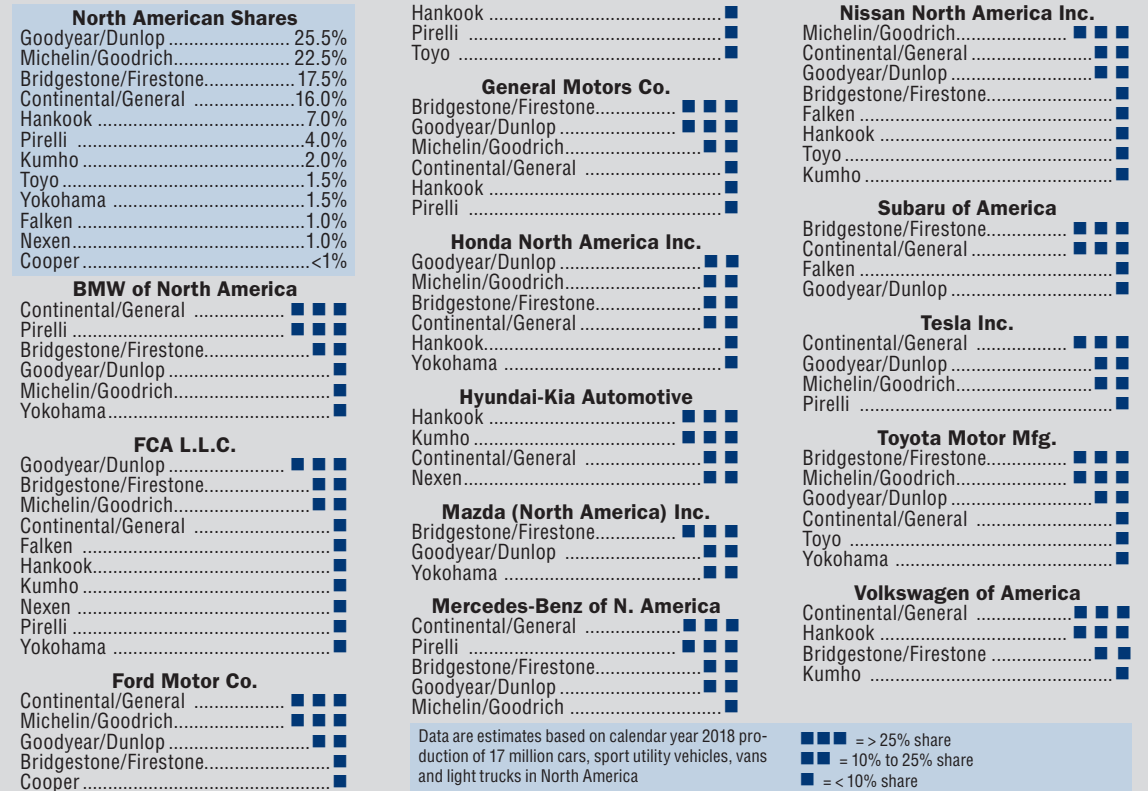
The 10 largest tire manufacturers collectively accounted for an estimated 80.4 percent of the \$47.3 billion tire sales in North America in 2018.



Source: Tire Business: company financial reports

TIRE BUSINESS graphic by michaelMcCrady

Original equipment passenger-LT tire market



North American tire sales¹

(in millions of dollars)

	2017 [®]	2018*
Bridgestone Americas Inc.	9,750	9,750
Michelin North America Inc.	9,200	9,100
Goodyear Tire & Rubber Co.	6,350	6,350
Continental Tire the Americas	3,150	3,400
Cooper Tire & Rubber Co.	2,417	2,280
Hankook Tire America Corp.	1,700	1,825
Toyo Tire (USA) Corp.²	1,540	1,625
Yokohama Tire Corp.	1,350	1,350
Sumitomo Rubber Industries Ltd.³	1,325	1,275
Pirelli Tire North America	1,150	1,200
Titan Wheel International Inc.	550	625
Kumho Tire USA	600	600
Giti Tire	575	600
Nexen Tire Corp.	400	500
Others	6,000	6,950
TOTAL (rounded)	46,000	47,300

* = estimated; based on preliminary sales data ® = revised from previous charts
 1 Tire manufacturers' sales; excludes vehicle service revenue from 'captive' retail operations
 2 Includes Nitto Tire
 3 Comprises revenue estimates for Falken Tire Corp. and TBC Corp.'s Sumitomo brand business

TIRE BUSINESS graphic by Michael McCrady

Replacement market shares — U.S. & Canada

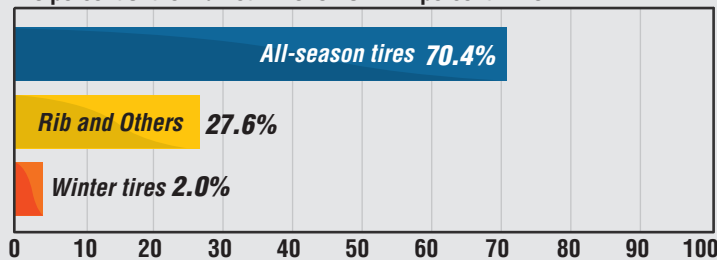
Passenger Tires		Light Truck Tires		Medium/Heavy Truck Tires	
Goodyear	11.0%	Goodyear	10.5%	Michelin	15.5%
Michelin	9.5%	BFGoodrich	8.0%	Bridgestone	15.5%
Bridgestone	7.5%	Michelin	7.5%	Goodyear	11.0%
Firestone	6.5%	Firestone	7.0%	Yokohama	7.0%
BFGoodrich	5.0%	Bridgestone	7.0%	Firestone	7.0%
TBC Brands ¹	5.0%	Cooper	5.5%	Continental	5.5%
Cooper	4.5%	TBC brands ¹	5.0%	Double Coin/Dynatrac	4.5%
Hankook/Aurora	4.5%	General	5.0%	Hankook	3.0%
Continental	4.0%	Hankook	4.5%	Roadmaster (Cooper)	3.0%
Falken	3.5%	Toyo	4.5%	General	2.5%
Yokohama	3.5%	Yokohama	4.0%	Hercules	2.5%
General	3.0%	Pirelli	2.5%	Toyo	2.0%
GT Radial/Primewell	3.0%	GT Radial/Primewell	2.0%	Sumitomo	1.5%
Pirelli	3.0%	Hercules	2.0%	BFGoodrich	1.5%
Pirelli	3.0%	Kumho	2.0%	Aeolus	1.0%
Toyo	3.0%	Continental	2.0%	Dayton	1.0%
Nexen	3.0%	Nexen	2.0%	Dunlop	1.0%
Kumho/Marshall	2.5%	Falken	2.0%	Kelly ²	1.0%
Sumitomo	2.0%	Uniroyal	1.5%	Sailun	1.0%
Uniroyal	1.0%	Mastercraft	1.5%	OTHERS	13.0%
Dunlop	1.0%	Dunlop	1.5%		
Hercules	1.0%	Kelly	1.0%		
Kelly	1.0%	Maxxis	1.0%		
Mastercraft	1.0%	OTHERS	10.5%		
Maxxis	1.0%				
Nitto	1.0%				
OTHERS	9.0%				

Share estimates are based on shipments of 237 million passenger tires, 35 million light truck tires and 23 million medium truck/bus tires in the U.S. and Canada during 2018.

1 - includes estimates for TBC's Delta, Eldorado, Multi-Mile, Vanderbilt, etc. brands

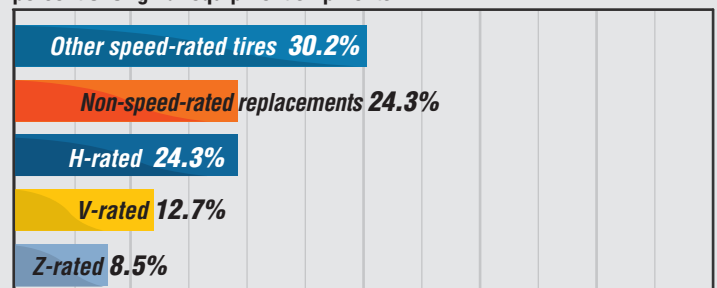
M&S Designs

Shipments of winter/traction tires to the U.S. replacement market fell to 2.0 percent of the market in 2018 from 2.1 percent in 2017.



Speed Ratings

Passenger tires carrying designated speed ratings accounted for an estimated 75.7 percent of U.S. replacement shipments in 2018 and 91.5 percent of original equipment shipments.



TIRE BUSINESS graphic by Michael McCrady

*Replacement figures are based on USTMA member data only and should be used only for establishing trends. Source: U.S. Tire Manufacturers Association preliminary 2019 data.

U.S. tire shipments (millions of units)

	2012	2013	2014	2015	2016	2017	2018 ¹
Passenger:							
Replacement	190.9	199.1	206.5	206.1	208.6	209.7	216.7
Imports ²	126.0	143.7	148.9	149.5	146.5	147.5	148.8
OE	40.0	43.6	47.8	49.7	49.3	45.2	47.1
Light Truck:							
Replacement	28.1	28.4	28.7	29.1	31.9	31.3	31.6
Imports ²	21.0	24.7	25.9	24.3	27.9	26.7	25.1
OE	4.2	4.4	4.6	4.4	4.9	5.4	5.6
Medium Truck/Bus:							
Replacement	15.8	15.7	17.4	18.6	18.2	19.7	21.3
Imports ²	10.5	10.2	13.1	14.4	13.9	14.6	16.5
Retreads	N.A.	N.A.	N.A.	14.8	14.5	14.3	N.A.
OE	5.1	4.8	5.4	6.2	5.0	5.4	6.5

Canadian tire shipments (millions of units)

	2012	2013	2014	2015	2016	2017	2018 ¹
Passenger:							
Replacement	15.6	15.7	18.1	18.1	17.9	19.1	19.9
Light Truck:							
Replacement	2.8	2.8	3.3	3.2	3.1	3.6	3.7
Medium Truck/Bus:							
Replacement	1.6	1.6	1.7	1.9	1.9	1.9	2.0

1 - Based on preliminary year-end data; subject to revision. 2 - Imports are included in the replacement shipment numbers. Sources: U.S. Tire Manufacturers Association; Tire and Rubber Association of Canada; Tire Retread and Repair Bureau; U.S. Dept. of Commerce

Market Data Book

Tire Market Facts

Retreading systems – U.S. & Canada

Company	Name of System	Type	No. of retread plants	Operators (N. America)
Acutread Alliance	Acutread Remanufacturer	Mold cure	5	5
Bridgestone Bandag	Bandag Retreading System	Precure	226	115
Continental	ContiLifeCycle	Precure	30	20
Goodyear	Goodyear Authorized Retread Process	Mold cure, Precure, Unicircle	87	58
Marangoni	Ringread System* Unitread*	Precure	30	27
		Precure	38	37
Michelin	Michelin Retread Technologies Oliver Retreading Systems	Precure, Mold cure	57	29
		Precure, Mold Cure	88	81

U.S./Canadian retread plants – 2015: 650/50 2016: 650/50 2017: 690/50 2018: N.A.
*All Ringread licenses with Marangoni are also Unitread licensees.

Original equipment and replacement tires

Medium truck tire sizes — replacement*

Rank	Size	Percent
1	295/75R22.5	24.7%
2	11R22.5	22.1%
3	11R24.5	10.1%
4	225/70R19.5	7.6%
5	275/80R22.5	6.0%
Top 5 Sizes		70.5%

Medium truck tire sizes — OE*

Rank	Size	Percent
1	295/75R22.5	29.8%
2	11R22.5	28.5%
3	275/80R22.5	10.4%
4	225/70R19.5	8.0%
5	11R24.5	6.0%
Top 5 Sizes		82.7%

Passenger tire sizes — replacement*

Rank	Size	Percent
1	205/55R16	4.4%
2	225/65R17	4.3%
3	215/55R17	3.5%
4	215/60R16	3.4%
5	195/65R15	3.1%
6	225/50R17	2.0%
7	225/60R16	1.8%
8	225/55R17	1.5%
9t	235/65R17	1.4%
9t	225/60R17	1.4%
Top 10 Sizes		26.9%

SOURCE: U.S. Tire Manufacturers Association 2019 Preliminary Factbook
*2018 estimates

Passenger tire sizes — original equipment*

Rank	Size	Percent
1	225/65R17	4.1%
2	235/60R18	3.8%
3	275/55R20	3.5%
4	235/45R18	3.3%
5t	245/60R18	3.0%
5t	235/40R19	3.0%
7t	275/65R18	2.3%
7t	235/55R17	2.3%
7t	235/65R18	2.3%
10	P265/70R17	2.0%
Top 10 Sizes		29.6%

Light truck tire sizes — replacement*

Rank	Size	Percent
1	LT265/70R17	10.1%
2	LT245/75R16	10.0%
3	LT225/75R16	7.1%
4	LT265/75R16	6.4%
5	LT275/70R18	5.8%
6	LT245/75R17	5.8%
7	LT285/70R17	3.9%
8	LT235/80R17	3.6%
9	LT235/85R16	3.5%
10	LT275/65R18	3.0%
Top 10 Sizes		59.2%

Light truck tire sizes — OE*

Rank	Size	Percent
1	LT245/75R17	13.1%
2	235/65R16C	11.8%
3	LT275/70R18	10.3%
4	LT275/65R18	8.6%
5	LT225/75R16	8.3%
6	LT265/70R18	7.2%
7	LT265/60R20	5.7%
8	LT245/75R16	5.4%
9	LT275/65R20	5.2%
10	LT285/70R17	4.4%
Top 10 Sizes		80.0%

SOURCE: U.S. Tire Manufacturers Association 2019 Preliminary Factbook
*2018 estimates

KENDA TRACTION

Associate Dealer Program

Black Card Rewards

Earn monetary rewards quarterly on a Kenda Traction Black Card.

CO-OP Rewards/Point-Of-Sale Support

Gain co-op rewards that you can use for in-store advertising or promotional giveaways via the online Kenda Store.

Marketing Portal

Receive access to Kenda branding tools such as product images, logos and our digital catalog.

Dealer Locator

Customers using the dealer locator on KendaTire.com will be guided to your store.

Global Brand with Local Support

New products are being designed for North America in our state-of-the-art technical center located in Akron, OH. We also have a full team of experienced support staff to help you with any product questions at Kenda USA headquarters in Columbus, OH.

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Enroll today at KendaTraction.com

Earn More in 2019!
 Traction dealers earn Double Rewards on select purchases each quarter.



DISTRIBUTORS GUIDE TO THE ONLINE CONSUMER

This is what big online retail doesn't want you to know. There are millions of tire shopping consumers in your distribution territory that aren't buying from you - they are buying from them! Treadhunter's new local-search integrated marketplace solution will equip your business for this internet disruption, tap into an ignored market and bring the internet consumer back into your sales channel!

The online consumer conversation has changed drastically. Within the past five years, a new trend has emerged as online consumers seek to shop near their location. Driven by convenience, "near me" searches are saturating the market. As a result, an increasing number of today's tire shoppers want to buy tires online and from local businesses. Despite this increase in demand, we found that nearly 90% of local, independent tire shops have inadequate e-commerce, unlike their online retail counterparts, like Tire Rack.

As can be seen in the graph from Google Trends, the popularity of the search phrase "tire shops near me" has risen in the last five years. The significance of this data is that consumers are searching locally and this market is growing.

This dichotomy leaves consumers with a single solution: To seek an experience only provided by online retailers, thereby taking that business out of the local sales channel. But why not offer online consumers what they really want in the first place - a local e-commerce experience.

We at Treadhunter see a symbiotic relationship between distributors and tire stores, and we believe that both businesses must leverage each other in order to be successful in the market. This relationship is stunted by the misconception that distributors can't pursue online consumers without competing with their tire shop customers. The notion that tire stores do not want distributors selling around them isn't applicable because tire stores are not equipped to or simply do not want to sell to online consumers.

To support this, Treadhunter evaluated the e-commerce capabilities of more than 20,000 independently owned tire shops across the country. We have conclusive data that more than 30% do not have a website while another 40% have websites with no inventory or pricing, or what we call an internet business card.

"If your website is giving consumers the same information search engines or directories provide, such as your name, address and phone number but no inventory and pricing, you are missing the e-commerce opportunity" said Eric Berger, Director of Sales and Business Development at Treadhunter.

The remaining tire shop's websites offer inventory yet require consumers to "call for price" while an even smaller percentage actually offers product AND pricing- the bare minimum for a preferred online consumer experience.

The challenge isn't simply technological, as Treadhunter learned during thousands of hours in the field meeting with hundreds of tire shops around the country. More than 70% of shop owners either do not want to work with online consumers or do not want to invest in technology.

According to Tony Barraza, owner of Tire and Wheel Pro in Houston, "Adjusting my business to receive orders from online consumers is too much hassle. I want the customers who want to call the store or walk into the shop. I don't see the need to invest in an e-commerce solution."

However, local tire shop's lack of sentiment to the online consumer's desired experience is not just documented through field conversations. It is manifested in the collective, national e-commerce capabilities of independent tire shops. It is here, where distributors can step in and take the reins.

If retail history has taught us anything, it is that ignoring the consumer's shopping experience has dire consequences. The most famous and costly of these disruptions were Blockbuster and Netflix.

Throughout the mid-late 2000s, Blockbuster held steadfast to their brick-and-mortar movie renting business model, despite a clear consumer preference for a better experience. While both businesses cohabitated, Netflix began to erode Blockbuster's consumer market. Over time more and more consumers purchased Netflix, effectively reducing their sales revenue year over year until Blockbuster went out of business. You must prepare for disruption, you cannot chase disruption.

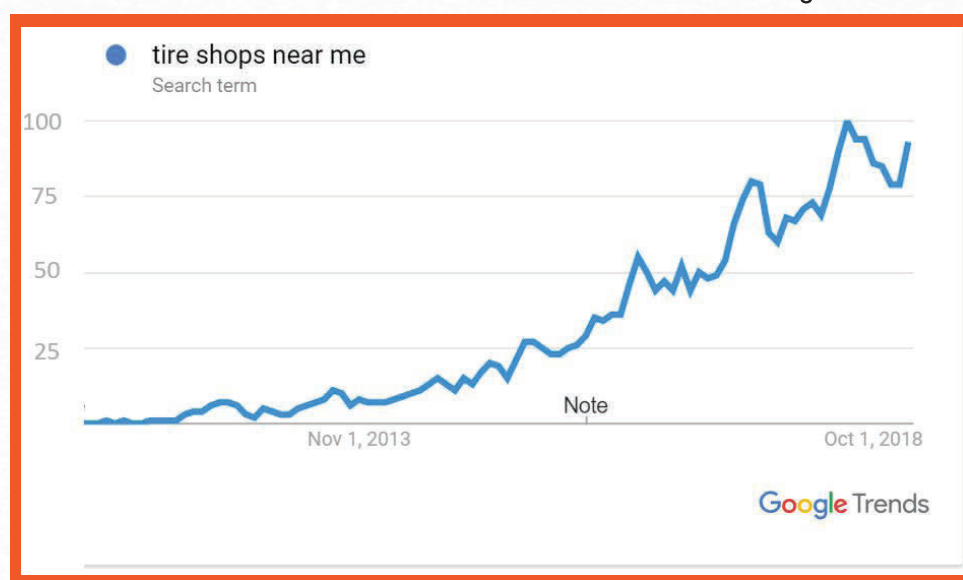
Clearly the tire industry remains unique because tires will always have to be installed. The main correlation between the current tire industry and the Blockbuster/Netflix saga lies with the consumer. Blockbuster ignored what the consumer wanted, and we see that echoed across a vast segment of the tire industry.

Unable to find the desired shopping experience, online consumers are moving away from distributor and tire shop sales channels because neither

" I didn't realize how many customers I was missing in my area until I signed up with Treadhunter.

As more and more tire shoppers prefer this experience, it gives me confidence knowing my business is participating and succeeding in internet sales. "

—Owner of King Wheel & Tire



is competing for their business. The result is an accelerating decline in business for both. A collaborative, e-commerce relationship between tire shop and distributor must be initiated.

In support of this necessary collaboration, Treadhunter has designed a new, local-search integrated marketplace solution that brings the internet sales channel back to the distributor and tire shop. Delivered by a state-of-the-art ecommerce experience, your tire inventory will be shopped by potentially millions of consumers throughout your territory.

Do you want to discover the untapped potential of your distribution network? The first step to take ownership of your internet sales channel is an E-commerce Risk Assessment from Treadhunter. Our teams then go to work creating an e-commerce strategy connecting your business to millions of consumers and deploying modules to have consumers buying across your distribution network!

"With hundreds of millions of tire consumer website visits every year and an increasing preference to shop locally, independent tire shops and distributors have never been in a better position to succeed - both now and in the future as disruption continues to reshape our industry." said Greg Spence, CEO of Treadhunter Inc.

FOR ADDITIONAL INFORMATION

Email Eric Berger at eberger@treadhunter.com or visit www.treadhunter.com

2018 Global tire company rankings

Based on fiscal 2017 sale. Includes subsidiaries.

(Figures in millions of dollars, translated at average annual currency exchange rates)

2017				2017					
2018 Rank	2017 Rank	Company/Headquarters	Tire sales	% of total corp. sales	2018 Rank	2017 Rank	Company/Headquarters	Tire sales	% of total corp. sales
1	1	Bridgestone Corp. ^{# 1} Tokyo, Japan	*24,350.0	*75.0%	39	39	Balkrishna Industries Ltd. [^] Maharashtra, India	692.2	100.0%
2	2	Group Michelin ^{#2} Clermont-Ferrand, France	*23,560.0	*95.0%	40	33	Shandong Shengtai Tyre Co. Ltd. Guangrao County, China	N.A.	—
3	3	Goodyear Tire & Rubber Co. [#] Akron, Ohio	*14,300.0	*93.0%	41	38	Jiangshu Tongyong Tire Ltd. Wuxi, China	660.3	100.0%
4	4	Continental A.G. [#] Hanover, Germany	*11,325.0	*28.5%	42	37	BRISA/Bridgestone-Sabancı Tire Mfg. ¹ Izmit, Turkey	630.2	100.0%
5	6	Sumitomo Rubber Industries Ltd. [#] Kobe, Japan	6,755.1	85.7%	43	31	Shandong Yongtai Group Donying City, China	N.A.	—
6	5	Pirelli & C. S.p.A. ^{# 3} Milan, Italy	6,034.2	100.0%	44	57	Shandong Wanda Tyre Co. Ltd. Dongying City, China	617.6	100.0%
7	7	Hankook Tire Co. Ltd. Seoul, South Korea	*5,913.6 [®]	*98.0%	45	44	Carlstar Group L.L.C. Jackson, Tennessee	570.0	100.0%
8	8	Yokohama Rubber Co. Ltd. ⁴ Tokyo, Japan	4,862.4	81.6%	46	71	Yanchang Petroleum Group Rubber Co. Ltd. Shaanxi, China	547.7	100.0%
9	9	Maxxis International / Cheng Shin Rubber Yuanlin, Taiwan	3,955.5	100.0%	47	49	Qingdao Sentury Tire Co. Ltd. Jimo, Shandong, China	534.0 [®]	100.0%
10	10	Zhongce Rubber Group Co. Ltd. Hangzhou, China	3,621.9	96.4%	48	40	Wanli Tire Group Guangzhou City, China	521.9	100.0%
11	11	Giti Tire Pte. Ltd. ⁵ Singapore	3,403.0	100.0%	49	50	O.J.S.C. Cordiant Moscow, Russia	*500.0	100.0%
12	13	Toyo Tire & Rubber Co. Ltd. Hyogo, Japan	2,920.5	80.8%	50	42	Weifang Yuelong Rubber Group Qingdao, China	493.4	100.0%
13	12	Cooper Tire & Rubber Co. Findlay, Ohio	2,854.7	100.0%	51	52	Shandong Bayi Tyre Manufacture Co. Ltd. Zhouzhuang, China	436.8	100.0%
14	14	Kumho Tire Co. Inc. ⁶ Seoul, South Korea	2,523.5	99.0%	52	52	Petlas Tyre Industry & Trade Co. Ankara, Turkey	399.4	100.0%
15	15	MRF Ltd. [^] Chennai, India	2,407.5	99.0%	53	36	JSC Belshina Belarus Tyre Works Bobruisk, Belarus	398.5	100.0%
16	17	Apollo Tyres Ltd. [^] Kerala, India	2,182.5	100.0%	54	45	Sichuan Haida Tyre Group Co. Ltd. Haidai/Sichuan, China	N.A.	—
17	20	Shandong Linglong Group Co. Ltd. Shandong, China	2,175.3	100.0%	55	47	Shandong Zhongyi Rubber Co. Ltd. Dawang/Shandong, China	N.A.	—
18	21	Shandong Hengfeng Tyre Co. Ltd. Guangrao County, China	1,997.0	100.0%	56	56	Nankang Rubber Tire Corp. Ltd. Taipei, Taiwan	372.4	100.0%
19	27	Sailun Jinyu Tyre Co. Ltd. Dongying City, China	1,977.0	100.0%	57	55	TVS Srichakra Ltd. [^] Chennai, India	341.0	100.0%
20	18	Nexen Tire Corp. ⁷ Seoul, South Korea	*1,654.0	*95.0%	58	50	Shandong Yinbao Tyre Group Shandong, China	N.A.	—
21	19	Nokian Tyres P.L.C. ^{# 1} Nokia, Finland	*1,645.0	*93.0%	59	60	Chaoyang Long March Tyre Co. Ltd. Liaoning, China	322.9	100.0%
22	16	Triangle Group Co. Ltd. Shandong, China	1,508.9	97.5%	60	52	Shandong Rongsheng Tyre Co. Ltd. Rongsheng, China	N.A.	—
23	26	Xingyuan Tyre Co. Ltd. Dongying City, China	1,293.9	100.0%	61	64	Shandong Sanli Tyre Manufacture Co. Ltd. Caoxian, Shandong, China	284.3	100.0%
24	22	JK Tyre & Industries Ltd. [^] New Delhi, India	1,291.8	100.0%	62	63	P.T. Multistrada Arah Sarana TBK Cikarang, Indonesia	281.0	100.0%
25	25	Titan International Inc. Quincy, Illinois	*1,175.1	*80.0%	63	58	FATE S.A.I.C.I. San Fernando, Argentina	270.8	98.1%
26	24	Kenda Rubber Industrial Co. Ltd. Yuanlin, Taiwan	1,071.7	100.0%	64	48	Barez Tyre Group Tehran, Iran	N.A.	—
27	29	Double Coin Holdings Ltd. Shanghai, China	1,046.4	100.0%	65	61	Xuzhou Armour Rubber Co. Ltd. ⁹ Xuzhou, Jiangsu, China	N.A.	—
28	23	Qingdao Doublestar Industrial Co. Ltd. ⁶ Qingdao, China	1,037.1	100.0%	66	62	Federal Corp. Tao Yuan, Taiwan	*241.0	100.0%
29	30	Aeolus Tyre Co. Ltd. Jiaozuo, China	986.1	100.0%	67	59	Birla Tyres Ltd. Orissa, India	225.2	100.0%
30	32	Trelleborg Wheel Systems S.p.A. Tivoli, Italy	*985.0	*26.6%	68	67	Shandong Sangong Tyre Co. Ltd. Zucheng City, China	N.A.	—
31	28	Ceat Ltd. [^] Mumbai, India	957.0	100.0%	69	69	Hwa Fong Rubber Ind. Co. Ltd. Taipei, Taiwan	188.9	100.0%
32	N.R.	Prometeon Tyre Group S.r.l. ³ Milan, Italy	*900.0	100.0%	70	70	Shandong Taishan Tyre Co. Ltd. Faicheng, China	N.A.	—
33	34	Prinx Chengshan (Shandong) Tire Co. Shandong, China	855.5	100.0%	71	N.R.	DaNang Rubber Co. DaNang, Vietnam	163.7	100.0%
34	41	Camso Ltd. ² Magog, Quebec	*830.0	*85.0%	72	73	Shandong Huitong Tyre Co. Ltd. Laiwu, China	158.0	100.0%
35	66	Nizhnekamskshina ⁸ Nizhnekamsk, Russia	800.0	100.0%	73	N.R.	Shandong Fengyuan Tyre Co. Ltd. Zaozhuang City, China	156.1	100.0%
36	35	Guizhou Tyre Co. Ltd. Guizhou, China	730.3	100.0%	74	72	Casumina (Southern Rubber Industry Co.) Ho Chi Minh City, Vietnam	152.1	93.8%
37	31	Hixih Rubber Industry Group Jining, China	N.A.	—	75	74	Specialty Tires of America Inc. Indiana, Pennsylvania	*150.0	100.0%
38	43	Shandong Haohua Tyre Group Co. Ltd. Weifang, China	709.2	100.0%	Subtotal (rounded)			*160,700.0	
								*7,500.0	
								*168,200.0	

= non-tire revenue from company-owned retail operations excluded ^ = fiscal year ends other than Dec. 31 * = estimated
N.A. = not available; N.R. = not ranked; ® = revised from previous reports

1 = Bridgestone owns 16% of Nokian Tyres P.L.C. (No. 21 on this year's Top 75) and 44% of BRISA Bridgestone (No. 42).
2 = Michelin is buying Camso Ltd. (No. 34 on this year's list) for \$1.45 billion; will create a \$2 billion/year OTR division.

3 = Pirelli now owned by China National Chemical Corp.; industrial business (farm and truck tires) have been spun off into a new company, Prometeon Tyre Group, that also will include commercial-related assets of CNCC. This restructuring reduced Pirelli's fiscal 2017 revenue by approximately \$1 billion.

4 = Yokohama's revenue from mid-2016 on includes sales from Alliance Tire Group.

5 = Giti's sales include revenue (\$1B+) of P.T. Gajah Tunggal of

Indonesia, in which Giti owns 49.7% stake; Michelin also owns a 10% share of Gajah Tunggal.

6 = China's Qingdao Doublestar Tire Co. Ltd. (No. 27 on this year's list) owns a 45% stake and management control of Kumho Tire.

7 = Nexen's sales include industrial tire and tube revenue from Nexen Corp.

8 = Pirelli, through a joint venture with Russian Technologies, owns an option to buy into or merge with Nizhnekamskshina.

9 = Formerly Xuzhou Xugong Tyre Co. Ltd.
10 = 'Others' represents as many as 100 other companies. The next largest are: Hayou Tire Co. Ltd., China; Vee Rubber Corp. Ltd., Thailand; General Tyre & Rubber Co. of Pakistan, Pakistan; Speedways Rubber Co., India; Hwa Fong Rubber (Thailand) Public Co. Ltd., Thailand; Inoue Rubber (Thailand) Co. Ltd., Thailand; Magna Tyres Group, Netherlands; Dunlop Aircraft Tyres Ltd., England; Otani Tire Co. Ltd., Thailand.



Daniels Tire Service
Santa Fe Springs, CA



**BTS Tire
& Service**
Providence, RI



**Moody's Tire &
Auto Service**
Franklin, TN



**McCord Tire &
Auto Service**
Terra Haute, IN



**Busch Auto
Service Center, Inc.**
Palatine, IL



**Hess Tire &
Auto Parts**
Lewistown, PA

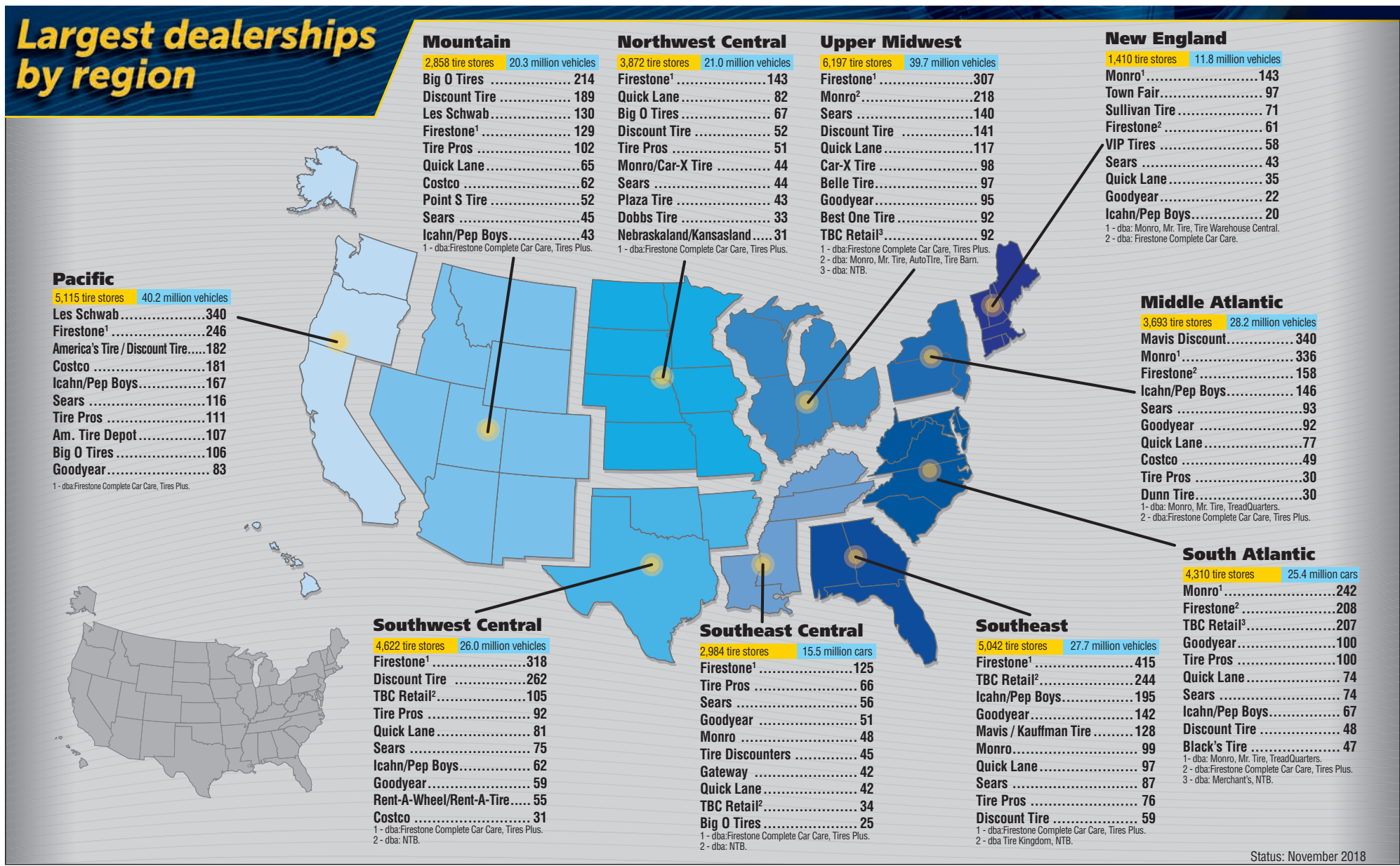


**Morgan Tire
Center Inc.**
West Liberty, KY

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Market Data Book

Tire Plant Codes

DOT issues 13 new plant codes over last year

By Bruce Davis

Tire Business Staff

WASHINGTON — The U.S. Department of Transportation issued 13 new DOT plant identification codes in the past year for tire factories worldwide, including six for plants in China and four in India.

This is a measurable drop from the past few years, when the number of new codes issued numbered in the dozens each year. In addition, the DOT re-assigned six existing codes to other plants.

Tire manufacturers wishing to sell tires intended for use on U.S. roadways must have a DOT code for each plant, and that code must be molded into the sidewalls of each such tire, according to DOT regulations.

The new codes bring to more than 1,050 the number of plants worldwide with at least one DOT code.

The new codes include just one in the Americas, 03L, for Group Michelin's plant in Leon, Mexico, operated by Industrias Michelin S.A. de C.V.

India's CEAT Ltd. was issued two codes, for plants in Nagpur, Maharashtra, India (03A), and Kancheepuram, Tamil Nadu, India (03N). CEAT recently has begun or ramped up sales efforts in North America and Europe.

Other new codes issued are:

- Agarwal Rubber Ltd., Hyderabad, India — 03J
- Directorate for Construction of Rubber Plants L.L.C., Angren, Tashkent, Uzbekistan — 03C
- Jiangsu Runchang Rubber Technology Co. Ltd., Suqian, Jiangsu, China — 03D
- P.T. Hung-A Corp., Bekasi, Indonesia — 03H
- Qingdao Puregain Tyre Co., Qingdao, Shandong, China — 03M
- Qingdao Summit Rubber Industry Co. Ltd., Qingdao, Shandong, China — 03R
- Roadboss Rubber Technology Co. Ltd., Dongying, Shandong, China — 03F
- Shandong Giki Tyre Co. Ltd., Qingdao, Shandong, China — 03K
- Shandong Runtong Rubber Co. Ltd., Rizhao, Shandong, China — 03P
- Vee Rubber India Pvt. Ltd., Ahmedabad, Gujarat, India — 03E

The DOT did not explain its reason for reassigning the existing codes. They are:

- 16A reassigned to Shandong Kaixuan Rubber Co. Ltd.; previously assigned to Roadstone Tyre & Rubber of Thailand, which also uses 6A.
- 17R to MRF Ltd. for Pondicherry, India, plant; previously assigned to Dongying Weide Tyre Co. Ltd., which also uses 7R.
- IUB reassigned to OJSC Yaroslavl in Yaroslavl, Russia; previously assigned to Shandong Hengyu Science & Tire, which also uses UB.
- Yaroslavl also has three other codes assigned to it: AR, 1AR and UB.
- IV5 reassigned to Shandong Guopeng Rubber Co. Ltd.; previously assigned to Bridgestone/Firestone de Mexico, which also uses WF.
- IW6 reassigned to Shandong Changhong Rubber Technology; previously assigned to MSF Tire & Rubber Inc. in the Philippines, which closed in 2001.
- 1XF reassigned to Jiaozuo Plant; previously assigned to Pirelli, Manresa, Spain, which closed in 2009.

Some details about the companies mentioned here:

Agarwal Rubber — ironically this Mumbai, India-based two-wheeler tire company is now out of business following a fire in April 2018 that destroyed the company's lone factory.

Jiangsu Runcheng Rubber is a producer of solid tires under the brand names Energy and GiantPower.

P.T. Hung-A, a subsidiary of South Korea's Hung-A Co. Ltd., produces OTR tires under the Tiron brand.

Qingdao Puregain Tyre is a motorcycle and bicycle tire and tube producer going to market under the Puregain, HRD, Maxima and Titan

Moto brands.

Qingdao Summit Rubber is a producer of motorcycle and small industrial tires and tubes, in business since 1998,

Shandong Giki Tyre is a producer of bias-ply OTR, agriculture, industrial, solid, truck and light truck tires.

Shandong Guopeng Rubber specializes in research, development, manufacturing and sales of high-end performance automobile tires.

Shandong Kaixuan Rubber is a truck and OTR tire producer, under the Deemax, Greforce and Kaiyue brands.

Vee Rubber India is a subsidiary

of Thailand's Vee Rubber Group dedicated to two-wheeler tires.

An online search for Roadboss Rubber Technology did not turn up any relevant information.

The tire manufacturer is not required to test the tires, but if they are sold in the U.S., they are subject to random testing by the National Highway Traffic Safety Administration (NHTSA), with penalties assessed if the tires fail to be in compliance with federal standards.

Tires found not in compliance with these federal standards will be subject to recall and the manufacturer is subject to civil penalties

of up to \$6,000 per tire — up to a maximum of \$17.4 million for any related series of violations, according to agency documents.

The new codes reflect the agency's policy of replacing the decades-old two-place alphanumeric system with a three-place identity.

The DOT switched out of concern that it would run out of two-place IDs.

In all but a few cases, the DOT added the numeral "1" in front of the existing code to create the new code. Exceptions to this practice are those codes that include "G," "S" or "Q" due to the potential for misreading a G or an S for a 2 or Q for 0, for example.



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**Performance results are based on SRUSA standard testing procedures conducted Q3 2017. Individual results may vary depending on vehicle type, tire maintenance, driving style and road conditions.

* Top 20 Model Year 2010-2017 Crossover Original Equipment Sizes
† Restrictions apply. Tire will be replaced free of charge. Mounting and balancing not included and you may be charged applicable taxes, the cost of valve stems, and disposal fees.
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Top Retail Dealerships

Ranked by 2017 retail sales (Based on company-owned outlets, year-end 2017)

Rank	Company	2017 Retail Sales (\$millions)	2017 \$ Sales / outlet	% breakdown tires/service/other	Rank	Company	2017 Retail Sales (\$millions)	2017 \$ Sales / outlet	% breakdown tires/service/other
1	Discount Tire / America's Tire ¹	4,840.0	\$4,964,103	100 / 00 / 00	27	United Tire & Service L.L.C.	26.3	\$1,753,333	30 / 70 / 00
2	TBC Retail Group Inc.	*3,000.0	\$4,137,931	N.A.	28	Purcell Tire & Rubber Co.	25.0	\$891,778	50 / 45 / 05
3	Icahn Automotive	*2,670.0	\$2,589,718	N.A.	29	Western Tire Centers	24.7	\$1,235,000	52 / 48 / 00
4	Les Schwab Tire Centers Inc.	1,572.6	\$3,744,276	N.A.	30	Delta World Tire	23.3	\$1,456,563	64 / 34 / 02
5	Monro Inc.	1,127.8	\$963,931	50 / 50 / 00	31	Robertson Tire Inc.	22.8	\$1,900,000	N.A.
6	4 Wheel Parts ^{1,2}	*885.0	\$9,943,820	N.A.	32	MFA Oil Co.	*21.0	\$1,235,294	51 / 49 / 00
7	Kal Tire	*475.0	*2,272,727	N.A.	33	Lex Brodie's Tire Co.	20.3	\$4,060,000	46 / 54 / 00
8	Belle Tire Distributors Inc.	350.0	\$3,608,247	62 / 38 / 00	34	Bauer Built Inc.	18.7	\$1,335,714	75 / 25 / 00
9	Fountain Tire Ltd.	230.0	\$1,437,500	59 / 40 / 01	35	Warren Tire Service Center Inc.	18.0	\$1,285,714	65 / 35 / 00
10	Best-One Tire & Service / Zurcher Group	*200.0	\$1,709,402	N.A.	36	St. Lucie Battery & Tire Co.	17.5	\$1,346,185	60 / 40 / 00
11	Sullivan Tire Co. Inc.	150.0	\$2,205,882	46 / 54 / 00	37	Chabill's Tire Service	*17.0	\$1,000,000	45 / 40 / 15
12	Dunlap & Kyle Co. Inc.	140.0	\$2,592,593	65 / 35 / 00	38	Pete's Tire Barns Inc.	16.0	\$1,333,333	91 / 09 / 00
13	ATV Inc. / American Tire Depot	128.0	\$1,230,769	65 / 35 / 00	38	Heartland Tire Inc.	16.0	\$1,142,857	50 / 50 / 00
14	Rent-A-Wheel / Rent-A-Tire	120.0	\$967,774	85 / 15 / 00	38	McCarthy Tire Service Co. Inc.	16.0	\$857,143	40 / 60 / 00
15	Dobbs Tire & Auto Centers Inc.	110.0	\$2,750,000	35 / 65 / 00	41	Stratham Tire Inc.	*14.3	\$1,100,000	N.A.
16	Graham Tire Co.	76.0	\$2,814,815	40 / 50 / 10	42	Direct Tire & Auto Service	14.0	\$3,500,000	45 / 55 / 00
17	Leeds West Groups	*70.0	\$714,286	20 / 80 / 00	43	Pueblo Tires & Service	12.6	\$969,231	70 / 30 / 00
18	VIP Inc.	59.5	\$1,062,500	42 / 58 / 00	43	Ziegler Tire	12.6	\$547,826	30 / 70 / 00
19	Tireman Auto Service Centers	51.0	\$2,989,712	45 / 55 / 00	45	Bruneel Point S Tire	12.0	\$1,200,000	35 / 65 / 00
20	Virginia Tire & Auto	42.9	\$3,575,000	23 / 77 / 00	46	Martin Tire Co.	11.0	\$1,100,000	74 / 17 / 09
21	Evans Tire & Service Centers Inc.	42.6	\$2,366,666	60 / 40 / 00	47	F&F Tire World	*10.0	\$833,333	40 / 60 / 00
22	GB Auto Service Inc.	40.0	\$851,064	20 / 80 / 00	48	Wilks Tire & Battery Service Inc.	9.5	\$950,000	50 / 45 / 5
23	Dunn Tire L.L.C.	*35.0	\$1,166,667	80 / 20 / 00	49	Raffield Tire Master	6.0	\$1,000,000	N.A.
24	Koldenhoven Enterprises	30.0	\$2,307,692	58 / 42 / 00					
25	Pomp's Tire Service	*28.0	\$528,302	N.A.					
26	Bauer Built Inc.	27.9	\$1,992,857	75 / 25 / 00					

1 - Online sales revenue skews average store sales figure upwards. *estimate
2 - Heavily skewed toward performance auto parts; tires, wheels make up just a small percentage.

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Ranked by company-owned outlets (Store totals as of August 2018)

Rank	Company	Outlets	Changes vs. '17
1	Discount Tire / America's Tire ¹	1,001	51
2	TBC Corp. / Tire Kingdom ²	731	-49
3	Mavis Discount Tire ³	649	308
4	Monro Muffler Brake Inc. ⁴	637	31
5	Icahn Automotive/Pep Boys ⁵	464	19
6	Les Schwab Tire Centers ⁶	421	5
7	Kal Tire	209	3
8	Fountain Tire ⁷	160	-1
9	Rent-A-Wheel / Rent-A-Tire ⁸	124	0
10	Best-One Tire & Service / Zurcher Group ⁹	117	2
11	Max Auto Supply ¹⁰	113	0
11	Tire Discounters Inc.	113	8
13	A.T.V. Inc. ¹¹	107	8
14	Belle Tire Distributors	100	3
15	Leeds West Groups ¹²	98	42
16	Town Fair Tire Centers	97	2
17	4 Wheel Parts ¹³	89	5
18	AAA Club Alliance ¹⁴	78	40
19	Sullivan Tire Co.	71	3
20	Plaza Tire Service	63	1
21	V.I.P. Parts, Tire & Service	58	2
22	Peerless Tire Co.	56	0
23	Western Automotive Group ¹⁵	54	42
23	Dunlap & Kyle ¹⁶	54	-2
25	Pomp's Tire Service	53	12
26	Tirecraft Group ¹⁷	50	10
27	Black's Tire & Auto Service	47	2
27	GB Auto Service ¹⁸	47	47
29	Tire Guys ¹⁹	41	1
30	Certified Tire & Auto Centers	40	0
30	Dobbs Tire & Auto	40	0
30	Commercial Tire Inc.	40	2
33	Nebraskaland/Kansasland Tire	39	2
34	Conrad's Total Car Care & Tire Centers	37	1
35	Jack Williams Tire	36	1
35	AKH Co. ²⁰	36	1
37	Graham Tire Co.	35	0
38	Benson Tire Group ²¹	30	0
38	Purcell Tire & Rubber Co.	30	-4
38	Dunn Tire L.L.C.	30	1
38	Mountain View Tire	30	0
42	Action/Gator Tire Stores ²²	29	2
43	Gorrepati Enterprises Inc. ²³	28	0
44	Brex Inc. ²³	27	0
45	Grismer Tire ²⁴	26	-1
45	Kost Tire & Auto Care ²⁵	26	3
47	Ben Tire Distributors ²⁶	25	-1
47	T.O. Haas Tire Co.	25	0
49	Golden West Tire ¹⁵	24	2
49	Raben Tire Co.	24	0
49	Ziegler Tire	24	1

Top Retail Dealerships

Ranked by total retail outlets (Store totals as of August 2018)

Rank	Company	outlets	Rank	Company	outlets	Rank	Company	outlets	Rank	Company	outlets
1	TBC Corp.	2,386*		> Express Oil	243	20	AAA Club Alliance	78	36	AKH Co. Inc.	36
	> Midas International	1,209	6	Tirecraft Canada Inc.	603*	21	Active Tire & Auto Centre	73	36	Jack Williams Tire Co. Inc.	36
	> Retail Group ¹	731	7	Les Schwab Tire Centers	479*	22	Sullivan Tire Co. Inc.	71	38	Graham Tire Co.	35
	> Big O Tires	446	8	OK Tire Stores Inc.	325*	23	Plaza Tire Service Inc.	63	39	Benson Tire Group	30
2	Icahn Automotive ²	1,931+	9	Kal Tire	209	24	VIP Inc.	58	39	Dunn Tire L.L.C.	30
	> Pep Boys ³	1,031	10	Pneus Unimax Ltee/ Point S Canada	202*	25	Peerless Tire Co.	56	39	Mountain View Tire & Service Inc.	30
	> AAMCO ⁴	600+	11	Fountain Tire Ltd.	160	26	Dunlap & Kyle Co. Inc.	54	39	Purcell Tire & Rubber Co.	30
	> Cottman ⁴	47	12	Rent-A-Wheel / Rent-A-Tire	140*	27	Pomp's Tire Service	53	43	Action Gator Tire Stores	29
	> Precision Tune ⁴	253	13	Best-One Tire & Service	117	28	Black's Tire & Auto Service	47	44	Grismer Tire Co.	26
3	Monro Inc. ⁵	1,282*	14	Tire Discounters Inc.	113	28	GB Auto Service Inc.	47	45	T.O. Haas Tire Co. Inc.	25
	> Monro Muffler, etc.	1,131	15	ATV/American Tire Depot	107	30	Tire Guys Inc.	41	45	Ben Tire Distributors	25
	> Car-X	151	16	RNR Tire Express & Custom Wheels	102*	31	Certified Tire & Service Centers	40	47	Raben Tire Co.	24
4	Discount Tire/America's Tire	1,001	17	Belle Tire Distributors Inc.	100	31	Dobbs Tire & Auto Centers Inc.	40	47	Ziegler Tire	24
5	Mavis Discount Tire ⁶	772*	18	Town Fair Tire Centers Inc.	97	31	Commercial Tire Inc.	40	49	Kost Tire & Muffler	23
	> Mavis, etc.	529	19	4 Wheel Parts	89	34	Nebraskaland Tire Group Inc.	39	50	Flynn's Tire Group	22
						34	Conrad's Tire Service Inc.	39	51	Express Tire Auto Service Center	21
									51	Jensen Tire & Auto	21

* — Store total includes associate, affiliate and/or franchised stores.
 1 — Comprises NTB, Tire Kingdom and Merchant's brands.
 2 — Icahn also operates 270-plus Auto Plus parts stores, which do not sell tires.
 3 — Comprises Pep Boys - Manny, Moe & Jack and Pep Boys Service & Tires stores.
 4 — Tire choice up to individual franchisees.
 5 — Monro does business under a variety of retail brands, including: Autotire, Car-X, Mr. Tire, Tire Choice, Monro Muffler, Tire Warehouse Central, Tread Quarters, etc.
 6 — Mavis does business under a variety of retail brands, including Mavis Tire, Cole Muffler, STS Tire, Kauffman Tire, Express Oil Change, etc.

Footnotes for adjacent table on page 18.

1 — Discount Tire — Thomas Reinault Corp. — uses the Discount Tire name in all states except California, where it uses 'America's Tire'; AKH Co. (No. 35) uses 'Discount Tire Centers' in California.
 2 — dba: Tire Kingdom; National Tire & Battery (NTB); and Merchant's Tire; store total includes 1 Big O Tire store; Merchant's Tire brand being phased out.
 3 — dba: Mavis Tire, Cole Muffler, STS Tire, Kauffman Tire, Express Oil Change. Merged operations with Express Oil Change & Tire Engineers (400 company-owned and franchised stores), February 2018; Acquired Kauffman Tire's retail business (69 stores), January 2018; Acquired Sun Tire & Automotive (10 stores) March 2018. Also has 123 franchised Express Oil outlets.
 4 — Tire Group stores only; dba: Mr. Tire, Tread Quarters, Autotire, Tire Warehouse Central, Tire Choice, Car-X, etc. Monro acquired 38 retail stores in the past year in eight deals, including Free Service Tire (12 stores) and Appalachian Tire's retail business (7 stores). Also has 98 franchised Car-X locations.
 5 — dba: Pep Boys Service & Tire Centers; Pep Boys also operates 567 Pep Boys-badged auto parts and tires and autos service stores. Icahn Automotive also operates several hundred Auto Plus auto parts stores.
 6 — There also are 59 associate dealer stores operating under the Les Schwab name.
 7 — 156 of the 160 stores are owned 50-50 with local partners; Goodyear owns 49-percent of Fountain.
 8 — Rent-A-Wheel's business model is tire and/or wheel leasing-to-own; company also has 16 franchised locations.
 9 — Best One comprises more than two dozen independent dealerships with common ownership under the Zurcher family; stores operate either as Best One Tire & Service or B1 Advantage Plus. Dealership also operates 87 commercial-only outlets.
 10 — Midas franchisee.
 11 — dba: American Tire Depot.
 12 — Big O Tires and Midas/Speedee franchisee; acquired Auto Systems Experts, Midas franchisee with 42 locations (Dec. 2017).
 13 — Transamerican Auto Parts (Polaris Corp.) subsidiary.
 14 — dba: Bob Sumerel Tire; AAA Tire & Automotive.
 15 — Big O Tires franchisee.
 16 — dba: Gateway Tire; Hesselbein Tire.
 17 — Store total shown here represents stores owned/operated by Tirecraft's principal owners; the group also has 588 affiliated dealers under Tirecraft signage.
 18 — Holding company for Ramona Tire (18 stores in California), Tire Works (15 in Nevada) & Brake Max (14 in Arizona).
 19 — dba: Tire-Rama.
 20 — dba: Discount Tire Centers in California.
 21 — dba: Benson Tire; Beverly Tire.
 22 — Owned by Christensen Enterprises; dba Action Gator Tire.
 23 — Car-X Tire & Auto franchisee.
 24 — dba: Grismer Tire; Dayton Tire; Detroit Tire.
 25 — Clarks Summit, Pa.-based Kost Tire & Auto Care; separate from Kost Tire of New York, which was acquired by Monro Muffler in July 2015.
 26 — dba: Neal Tire & Auto Service.



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MAXXIS AUTHORIZED DEALER

A list of manufacturers' DOT codes

Editor's note:

This listing is compiled by *Tire Business* from the Department of Transportation's list of DOT codes, current as of year-end 2017. The DOT list was cross-checked with *Tire Business'* Global Tire Report databases to ensure codes are matched accurately with each plant's current owner/operator.

This list excludes codes assigned to plants that are closed or are assigned to facilities that don't make new pneumatic tires (such as retread plants or research and development centers).

The DOT has issued a second set of 3-place alpha/numeric codes,

covering every existing plant location in its database, in line with regulations issued in April 2015 by the National Highway Traffic Safety Administration.

The 2-place codes are to be phased out no later than 2025. All new factories are being issued 3-place codes only.

A complete list of all codes is available for purchase from *Tire Business'* Data Store. The list is organized alphabetically and numerically; the numbers-first and numbers-only codes follow the letters-first codes.

• indicates there is more than one

code for that particular plant.

A

- AA, 1AA** Tianjin Normandy Rubber Co. Ltd.....Qiao San Dao/Tianjin, China
- AB, 1AB** Weifang Rubber FactoryWeifang/Shandong, China
- AC, 1AC** Shandong Huasheng Rubber Co. Ltd.Dongying City, Shandong, China
- AD, 1AD** Shandong Yongfeng Tyres Co. Ltd.....Linyi City, Shandong, China
- AE, 1AE** BridgestoneSantander, Spain
- AF, 1AF** ContinentalLousada, Portugal

- AG, 2A6** JK Tornel S.A. de C.V. (JK Tyres).....Tacuba, Mexico
- AH, AH** SumitomoTuney, Cankiri, Turkey
- AI, 1A1** Longkou Xinglong Hicon Tyre Co.....Longkou/Shandong, China
- AJ, 1AJ** Shandong New Continent Tyre Co. Ltd.....Yishui, Shandong, China
- AK, 1AK** Qingdao Fuyingda Rubber Co. Ltd.....Jimo, Shandong, China
- AL, 1AL** Shandong Deruta Tyre Technology Co. Ltd.Yinan, Shandong, China
- AM, 1AM** Qingdao Lidingwei Rubber Tyres Co. Ltd.Linyi City, Shandong, China

- AN, 1AN** Shandong Shegshitailai Rubber Technology Co. Ltd.Qingzhou City, Shandong, China
- AO, 1A0** Wearwell Tire.....Bhopal, India
- AP, 1AP** Michelin.....Ardmore, Okla.
- AQ, 3A0** Meiyan Tire Co. Ltd. (Carlstar)Meixian/Guangdong, China
- AR, 1AR** OJSC Yaroslavl.Yaroslavl, Russia
- AS, 2A5** Qingdao Qinqian Rubber Group.....Qingdao/Shandong, China
- AT, 1AT** Cooper.....Melksham, England
- AU, 1AU** Shandong Futai Tire Co. Ltd.....Linyi City, Shandong, China
- AV, 1AV** Shandong Wosen Rubber Co. Ltd.....Dawang, Shandong, China
- AY, 1AY** Shandong Luhe Group General Co.....Zhucheng/Shandong, China
- AO, 1A0** Qingdao Lianyi Tyres Co. Ltd.Pingdu, Shandong, China
- A1, 1A1** Michelin.....Potiers, France
- A2, 1A2** Qingdao Great Rubber Factory.....Pingdu, Shandong, China
- A3, 1A3** Continental Tire North AmericaMount Vernon, Ill.
- A5, 1A5** TC Debica (Goodyear)Debica, Poland
- A6, 1A6** Apollo Tyres.....Kerala, India
- A7, 1A7** Bridgestone...Bangkok, Thailand
- A8, 1A8** BridgestoneJakarta, Indonesia
- A9, 1A9** Titan Tire.....Bryan, Ohio

B

- BA, 1BA** Qingdao Longhua Special Hand Truck Co. Ltd.Jiaonan City, Qingdao, China
- BB, 1BB** Chongqing Hankook Tire Co. Ltd. ...Chongqing City, Chongqing, China
- BC, 1BC** Hankook ..Lippo Cikarang, Bekasi, Indonesia
- BD, 1BD** Hubei Aulice Tyre Co. Ltd.Huangshi, Hubei, China
- BE, 1BE** Michelin.....Tuscaloosa, Ala.
- BF, 1BF** Michelin.....Fort Wayne, Ind.
- BH** Xuzhou Tongfei Tyre Co. Ltd.Xuzhou City, Jiangsu, China
- BJ, 1BJ** Jiangsu Hankook Tire Co. Ltd.....Huaiyin/Jiangsu, China
- BK, 1BK** Anshan Tyre FactoryAnshan City, China
- BN, 1BN** Shandong Chuanghua Tire Co. Ltd.....Rizhao City, Shandong, China
- BP, 1BP** Shandong Yinbao GroupShouguang, Shandong, China
- BR, 1BR** SDF General Rubber Co. Ltd.....Pudong/Shanghai, China
- BT** Shandong Zhongchuang Tyres Co. Ltd.....Linyi City, Shandong, China
- BU, 1BU** Shouguang Firemax Tyre Co. Ltd.....Shouguang, Shandong, China
- B0, 1B0** Sichuan Yuan Xing Rubber Co. Ltd.Dayi, Sichuan, China
- B1, 1B1** MichelinLaRoche sur Yon, France
- B2, 1B2** ContinentalSelangor, Malaysia
- B3, 1B3** MichelinBridgewater, Nova Scotia
- B4, 1B4** Taurus (Michelin)Budapest, Hungary
- B5, 1B5** Stomil-Olsztyn (Michelin)Olsztyn, Poland
- B6, 1B6** Michelin.....Spartanburg, S.C.
- B7, 1B7** Michelin.....Dothan, Ala.
- B8, 1B8** Michelin....Rio de Janeiro, Brazil
- B9, 1B9** Michelin.....Lexington, S.C.

C

- CC, 1CC** Yokohama.....Salem, Va.
- CD, 1CD** Alliance (Yokohama)Hadera, Israel
- CE, 1CE** PirelliHoechst/Odenwald, Germany
- CF, 1CF** Titan Tire.....Des Moines, Iowa



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NEXEN TIRE

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Market Data Book

Tire Plant Codes

CJ, 1CJ Inoue Rubber.....Ikeda, Japan
CL, 1CL Inoue Rubber Vietnam Co. Ltd.
Hanoi, Vietnam
CM, 1CM Toyo Tyre Manufacturing (Malaysia) Sdn. Bhd.....Taiping, Malaysia
CN, 1CN Continental A.G.
Sarreguemines, France
CO, C01 Goodyear.....Adapazari, Turkey
CP, 1CP Continental A.G.
Korbach, Germany
CR, 1CR Qingdao Guangming Tyres Mfg. Co. Ltd.....Qingdao/Shandong, China
CT, 1CT Shandong Duratti Rubber Corp. Co. Ltd.....Qing Zhou, Shandong, China
CU, 1CU Continental
Hannover-Stoecken, Germany
CW, 1CW Toyo TireItami, Japan
CX, 1CX Toyo Tire
Sendai (Miyagi), Japan
CY, 1CY Specialty Tire.....Indiana, Pa.
C0, 1C0 Kumho Tire Tianjin Co. Inc.
Tianjin, China
C1, 1C1 Techking Tires Ltd.
Shandong, China
C2, 1C2 Shandong Bayi Sailun Tyre Manufacture Co. Ltd.
Zhaozhuang, Shandong, China
C4, 1C4 Carlstar Group...Clinton, Tenn.
C5, 1C5 Bridgestone.....Poznan, Poland
C6, 1C6 Mitas...Prague, Czech Republic
C8, 1C8 Bridgestone.....Hsin chu, Taiwan
C9, 1C9 Seven Star Rubber
Chang-Hua, Taiwan

D

DA, 1DA Sumitomo.....Buffalo, N.Y.
DB, 1DB Double Coin Group (Xinjiang) Kunlun Tyre Co. Ltd.
Urumqi City, Xinjiang, China
DE, 1DE Jiangsu Roc Tyres Co. Ltd.
Xuzhou, China
DF, 1DF Qingdao Newhawk Tires Co. Ltd.....Jimo Qingdao/Shandong, China
DH, 1DH Bridgestone
Shenyang, Liaoning, China
DJ, 1DJ Qingdao Anli Rubber Co. Ltd.
Qingdao/Shandong, China
DK, 1DK Goodyear
Montlucon, France
DL, 1DL Goodyear.....Amiens, France
DM, 1DM Goodyear.....Hanau, Germany
DN, 1DN Goodyear.....Wittlich, Germany
DP, 1DP J.S.C. Cordiant-Vostok
Omsk, Russia
DR, 1DR Weifang Antai Tyre
Weifang/Shandong, China
DT, 1DT Qingdao Fuyuan Tyre Co. Ltd.
Qingdao, Shandong, China
DU, 1DU Giti Greatwall Tire (Yinchuan) Co. Ltd.....Yinchuan/Ningxia, China
DV, 1DV Vredestein (Apollo)
Enschede, Netherlands
D0, 1D0 Kumho
Changchun, Jilin, China
D2, 1D2 Bridgestone...LaVergne, Tenn.
D4, 1D4 Dunlop India...Calcutta, India
D5, 1D5 Dunlop India...Madras, India
D6, 1D6 Fujian Haiyan Rubber Co. Ltd.
Putian City, China
D7, 1D7 Sumitomo
Ladysmith, South Africa

E

EB, 1EB Metzeler (Pirelli)
Odenwald, Germany
EC, 1EC Metzeler (Pirelli)
Hoechst, Germany
EE, 1EE Nitto (Toyo)
Kanagawa, Japan
EH, 1EH Bridgestone.....Kurume, Japan
EJ, 1EJ Bridgestone.....Tosu, Japan
EK, 1EK Bridgestone.....Amagi, Japan
EL, 1EL Bridgestone.....Hikone, Japan
EM, 1EM Bridgestone.....Tokyo, Japan
EN, 1EN Bridgestone.....Nasu Japan
EP, 1EP Bridgestone.....Tochigi, Japan
ER, 1ER Qingdao Doublestar Tyre Industry Co. Ltd.
Qingdao/Shandong, China

ET, 1ET SumitomoKobe, Japan
EU, 1EU SumitomoNagoya, Japan
EV, 1EV Qingdao Yellow Sea Rubber Co. Ltd.....Qingdao/Shandong, China
EW, 1EW Wuyi Qiangnai Rubber Manufacture Co. Ltd.
Wuyi County, Zhejiang, China
EX, 1EX Kleber (Michelin)
La Chappelle, France
E0, 1E0 Chongqing Hension Group Jiulongpo.....Chongqing, China
E1, 1E1 Chung Hsin.....Taipei, Taiwan
E2, 1E2 Bridgestone...Sao Paulo, Brazil
E3, 1E3 Bridgestone
LaVergne, Tenn.
E4, 1E4 Hebei Xiemei Rubber Products Co. Ltd.....Pingxiang, Hebei, China
E5, 1E5 Bridgestone
Port Elizabeth, South Africa
E6, 1E6 Otani Radial Tire Co. Ltd.

.....Nakornpathorn, Thailand
E8, 1E8 Service Industries Ltd.
Gujart, Punjab, Pakistan
E9, 1E9 Bridgestone...Brits, South Africa

F

.....Montceau-les-Mines, France
FN, 1FN Michelin.....Tours, France
FR, 1FR Coaxian Guidestone Tyre Co. Ltd.....Coaxian/Shandong, China
FS, 2F5 Jinzhou Xin Xing Rubber Production Co. Ltd....Xin Xing, China
FT, 1FT Michelin
Bad Kreuznach, Germany
FU, 1FU Michelin.....Bamberg, Germany
FV, 1FV Michelin
Homburg/Saar, Germany
FW, 1FW Michelin...Karlsruhe, Germany
FY, 1FY Balkrishna Industries Ltd.
Kutch, Gujarat, India
F0, 1F0 Titan Tire.....Natchez, Miss.
F1, 1F1 Michelin...Dundee, Scotland/U.K.
F2, 1F2 Bridgestone
Valencia, Venezuela
F3, 1F3 Michelin.....Roanne, France
F4, 1F4 CNB/Camac

.....Porto, Portugal
F5, 1F5 FATE.....Buenos Aires, Argentina
F6, 1F6 Bridgestone
Puente San Miguel, Spain
F7, 1F7 Bridgestone
Puente San Miguel, Spain
F8, 1F8 JK Tyre.....Mysore, India

H

HA, 1HA Michelin.....Aranda, Spain
HB, 1HB Michelin.....Lasarte, Spain
HC, 1HC Michelin.....Vitoria, Spain
HD, 1HD Michelin.....Cuneo, Italy
HE, 1HE Michelin....Alessandria, Italy
HF, 1HF CJSC Cordiant Vostok
Omsk, Russia
HG, 2H6 China Shenma Group Rubber Tyre Co. Ltd.
Pingdingshan City/Henan, China

Continued on Page 23

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North America's largest commercial dealerships

The largest independents in the U.S. and Canada, based on 2017 sales

Rank 2018	Company/Headquarters	Commercial Sales (\$ millions)	Company Owned Outlets	Commercial Employees: Services/Sales	Service Truck
1	Southern Tire Mart L.L.C. Columbia, Miss.	\$1,045.0	80	<--1,850-->	605
2	Kal Tire Vernon, British Columbia	\$728.8#	133^	N.A.	700+
3	Best One Tire & Service L.L.C.¹ Indianapolis	*\$425.0	141	N.A.	450+
4	Pomp's Tire Service Inc.² Green Bay, Wis.	*\$408.0	91^	N.A.	402
5	Snider Fleet Solutions³ Greensboro, N.C.	\$400.0	82	N.A.	150
6	Les Schwab Tire Centers⁴ Bend, Ore.	\$337.5	421	N.A.	1,500
7	McCarthy Tire Service Co. Inc.⁵ Wilkes-Barre, Pa.	\$316.5	50^	297 / 129	285
8	Service Tire Truck Centers Inc.⁶ Bethlehem, Pa.	*\$225.0	49^	334 / 83	265
9	Bauer Built Inc. Durand, Wis.	\$198.9	34^	152 / 110	96
10	Purcell Tire & Rubber Co. Potosi, Mo.	\$190.9	42^	165 / 125	150
11	Boulevard Tire Center Deland, Fla.	\$173.9	22^	294 / 32	170
12	Tredroc Tire Services⁷ Antioch, Ill.	\$170.0	20	40 / 80	150
13	Parkhouse Tire Inc. Bell Gardens, Calif.	\$164.0	12	<---400--->	125
14	T&W Tire Inc.⁸ Oklahoma City	\$118.8	28^	N.A.	130
15	Redburn Tire Co. Phoenix	\$117.0	15	125 / 40	125
16	Atlanta Commercial Tire Forest Park, Ga.	\$106.0	11^	45 / 60	55
17	Bob Sumerele Tire Co. Erlanger, Ky.	\$103.6	17^	90 / 50	70
18	Allied Oil & Tire Co. Omaha, Neb.	\$102.6	7^	33 / 37	31
19	Ziegler Tire & Supply Co. Massillon, Ohio	\$92.7	17^	38 / 35	92
20	Raben Tire Co. Inc. Evansville, Ind.	*\$87.5	23^	N.A.	99
21	Sullivan Tire Co. Inc. Norwell, Mass.	*\$85.0	15^	N.A.	79
22	Dillon Tire Inc. / Cross Dillon Tire Lincoln, Neb.	*\$81.0	7^	N.A.	N.A.
23	Pete's Tire Barn Inc. Orange, Mass.	*\$75.5	22^	180 / 24	132
24	Fountain Tire Ltd.⁹ Edmonton, Alberta	\$72.5#	109^	489 / 225	387
25	Jack's Tire & Oil Inc. Logan, Utah	\$69.3	11^	103 / 28	55
26	Eastern Iowa Tire Inc. Davenport, Iowa	\$62.7	17	78 / 31	54
27	McGriff Tire Co./McGriff Treading Co. Inc. Cullman, Ala.	*\$61.0	12^	N.A.	N.A.
28	Valley Tire Co. Inc. Charleroi, Pa.	\$54.6	17^	90 / 26	58
29	Good Tire Service Inc. Kittanning, Pa.	\$52.6	9^	N.A.	40+
30	Graham Tire Sioux Falls, S.D./Spencer, Iowa	\$52.5	216	33 / 22	30
31	Custom Bandag Inc. Linden, N.J.	*\$52.0	15^	N.A.	100
32	Royal Tire Inc. St. Cloud, Minn.	\$50.4	15	50 / 25	65
33	Commercial Tire Inc. Meridian, Idaho	*\$50.0	37^	82 / 42	181
34	Pete's Road Service Fullerton, Calif.	\$48.0	10	60 / 21	60
35	Callaghan Tire Co. Bradenton, Fla.	\$46.0	12^	60 / 60	60

FOOTNOTES

* = estimated; N.A. = not available; ^ = includes combination retail/commercial outlets

= converted from Canadian \$ at 1.3 per U.S. \$

1 — d.b.a.— Best One Tire & Service; includes sales of S&S Tire, Southern Indiana Tire, Tommy House Tire, Huber Tire, Zurcher Tire, Southern Illinois Tire, etc.

2 — Pomp's acquired Cross-Midwest Tire Co. (13 locations; \$135M annual sales) in Q4 2016.

3 — Snider acquired 27 commercial centers and four retread plants from TCI Tire Centers, Q3 2017

4 — Also has 59 'member dealers.'

5 — Acquired 6 GCR locations in Md., N.Y. & Pa. Q3 2017; acquired Sandone Tire's commercial business and PJ Dooling/OTR business, Q2 2017.

6 — Also operates through seven associate dealers in New Hampshire, New York and Vermont.

7 — Tredroc merged its business in 2016 with the commercial business of Belle Tire.

8 — T&W acquired 16 TCI commercial locations (in Kan., La., Mo., Texas), including 2 retread plants, in Q3 2017.

9 — Minority owned by Goodyear Canada; 54 Fountain stores are corporate partnerships, 12 are associate dealers.

Top franchise/marketing groups

As of August 2018

Program/Administrator	No. of outlets	Type of program — www.
ATD ServiceBay American Tire Distributors Inc.	25,000+	Affiliate atd-us.com
Alliance Michelin North America Inc.	10,000+	Associate michelinman.com
Cooper Medallion/Mastercraft Century Cooper Tire & Rubber Co.	7,000+	Associate coopermadallion.com
G3Xpress Goodyear Tire & Rubber Co.	5,000	Affiliate goodyear tires.com
ONE Associate Dealer Hankook Tire America Corp.	4,400	Associate hankooktire.com
Next Level Nexen Tire America Inc.	4,200	Associate nexennextlevel.com
Premium Fuel Kumho Tire USA Inc.	4,000+	Associate kumhousa.com
Treadmaxx Treadmaxx Tire Distributors Inc.	4,000	Associate treadmaxx.com
Gold Retailer Program Continental Tire the Americas L.L.C.	2,500+	Associate Contilink.com/gold
TAG Tire Alliance Groupe Ltd.	2,500	Other tirealliance.com
Goodyear Tire & Service Network¹ Goodyear Tire & Rubber Co.	2,400	Affiliate goodyear.com/services
Driven Toyo Tire U.S.A. Corp.	1,900	Associate toyodriven.com
Advantage Yokohama Tire Corp.	1,700+	Associate yokohamatire.com
Falken - Fanatic Sumitomo Rubber North America Inc.	1,579	Associate falkentire.com
Bridgestone Affiliated Retailer Nationwide Network (Direct) Bridgestone Americas Tire Operations L.L.C.	1,528	Affiliate affiliatedretailer.net
Mr. Tire / Big 3 Tire K&M Tire Inc.	1,500+	Associate mr-tire.com
Kenda Traction American Kenda Rubber Ind. Co. Ltd.	1,164	Affinity Group kendatire.com
Bridgestone Affiliated Retailer Nationwide Network (Indirect) Bridgestone Americas Tire Operations L.L.C.	1,150	Affiliate affiliatedretailer.net
Midas Auto Service TBC Corp.	1,149	Franchise midasfranchise.com
T3 Marketing Program National Tire Wholesale	1,100+	Affiliate t3tires.com
Meineke Car Care Centers Driven Brands Inc.	975	Franchise meineke.com
FasTrack Pirelli Tire North America L.L.C.	900+	Associate pirelli.com
Tire One / Tread Pros / DealerForce² U.S. AutoForce	740	Affiliate usautoforce.com/programs
Tire Pros Tire Pros Francorp/American Tire Distributors Inc.	680	Franchise tirepros.com
ITDG—Independent Tire Dealers Group Independent Tire Dealers Group L.L.C.	660	Affiliate independent-tire.net
Mickey Thompson Marketing Alliance Mickey Thompson Performance Tires & Wheels	546	Associate mickeythompson tires.com
Tirecraft/Signature Tirecraft Canada Group	520	Other tirecraft.com
Big O Tires Big O Tires L.L.C./TBC Corp.	449	Franchise bigotires.com
O.K. Tire Auto Service/OK Tire Commercial O.K. Tire Stores Inc.	327	Franchise oktire.com
Point S (Canada) Pneus Unimax Ltd.	204	Affiliate point-s.ca
Point S Tire & Auto Service (U.S.) Point S Tire & Auto Service	200+	Co-operative joipointstire.com
Tire Solutions Tire Solutions Inc.	187	Associate mytiresolutions.com
ITD—Independent Tire Dealers Community Wholesale Tire Distributing Inc.	175	Affiliate itdroll.com
Car-X Tire & Auto¹ Monro Inc.	138	Franchise Carx.com
Xpress Tire & Auto Service Conrad's Xpress Tire Inc.	128	Affiliate xpresstire.com
Integra Tire & Auto Centers National Tire Distributors ³	105	Other integratire.com

1 — Store count includes company-owned stores.

2 — Tire's Warehouse Inc. of Corra, Calif., also offers the Tire One program in its distribution area under license from U.S. AutoForce.

3 — American Tire Distributors Inc. subsidiary.

Source: Tire Business survey data

Market Data Book

Tire Plant Codes

Continued from Page 21

HJ, 1HJ Michelin
.....Ballymena, Northern Ireland
HK, 1HK Shandong Xinghongyuan Tyre Co. Ltd.
.....Linyi City, Shandong, China
HL, 1HL Shandong Yongjin Rubber Co. Ltd.
.....Guangrao, Shandong, China
HN, 1HN Michelin
.....New Glasgow, Nova Scotia
HR, 1HR Qingdao Taifa Group Ltd.
.....Qingdao/Shandong, China
HT, 1HT Pirelli
.....Settimo Vettura/Turin, Italy
HU, 1HU Pirelli.....Settimo/Veicolo, Italy
HW, 1HW Continental-Barum
.....Otrokovice, Czech Republic
HX, 1HX Double Coin Group (Anhui) Warrior Tyre Co. Ltd.
.....Wuwei, Anhui, China
HY, 1HY Bridgestone
.....Oklahoma City, Okla.
H0, 1H0 General Tyre Pakistan.
.....Karachi, Pakistan
H1, 1H1 Michelin.....Valladolid, Spain
H2, 1H2 Kumho.....Kwangju, South Korea
H3, 1H3 Sava (Goodyear)
.....Kranj, Slovenia
H4, 1H4 Bridgestone.....Hofu, Japan
H6, 1H6 Shin Hung Rubber
.....Kyung Nam, South Korea
H7, 1H7 Li Hsin Rubber
.....Chang-Hwa, Taiwan
H8, 1H8 Hsing Kwo Rubber Mfg. Co. Ltd.
.....Tsztung, China

J

J0, 1J0 Korea Inoue Kasei
.....Masang, South Korea
J2, 1J2 Shandong Haolong Rubber Tyre Co. Ltd.
.....Dongying, Shandong, China
J3, 1J3 Continental.....Puchov, Slovakia
J6, 1J6 Jaroslavl Tire.....Jaroslavl, Russia
J7, 1J7 Hoosier Tire (Continental)
.....Lakeville, Ind.
J8, 1J8 Ta Chung Hu.....Shanghai, China
J9, 1J9 PT Intirub.....Jakarta, Indonesia
JA, 1JA Liaoning Permanent Tyre Co. Ltd.
.....Chaoyang, Liaoning, China
JB, 1JB1 Shandong Zhengxing Tyres Co. Ltd.
.....Linyi, Shandong, China
JD, 1JD P.T. Suryaraya Rubberindo Industries.....Bogor, Indonesia
JE, 1JE Shandong Yongsheng Rubber Co. Ltd.
.....Dongying, Shandong, China
JG, 2J6 Jilin Province Chunwei Tyre Co. Ltd.
.....Gongzhuling/Jilin, China
JH, 1JH Shandong Shuanwang Rubber Co. Ltd.
.....Dongying, Shandong, China
JJ, 1JJ Nexen Tire
.....Laixishi, Qingdao, China
JK, 1JK Tovic Tyre Co. Ltd.
.....Chanwon City, South Korea
JL, 1JL Shandong Bayi Sailan Tyre Manufacturer Co. Ltd.
.....Zao Zhuang, Shandong, China
JM, 1JM Yokohama
.....Suzhou, Jiangsu, China
JN, 1JN Dongying Fangxing Rubber Co. Ltd.
.....Dongying, Shandong, China
JP, 1JP Anhui Primewell Rubber & Plastics Co. Ltd.
.....Hefei/Anhui, China
JR, 1JR Pirelli.....Rome, Ga.
JT, 1JT K.R.M. Tyres.....Baddi, India
JU, 1JU Hangzhou Zhongce Rubber Co. Ltd.
.....Hangzhou, Zhejiang, China
JV, 1JV Fullrun Tyre Tech Corp. Ltd.
.....Qingdao, Shandong, China
JW, 1JW Pirelli.....Voronezh, Russia
JX, 1JX Dongying Xinjinshan Rubber Co. Ltd.
.....Dongying, Shandong, China
JY, 1JY Bridgestone
.....Stargard Szczecinski, Poland

K

KA, 1KA Deestone Radial Tyre (dba Svizz One Corp. Ltd.)
.....Banglana, Thailand

KB, 1KB Zhaoqing Junhong Co. Ltd.
.....Zhaoqing, Guangdong, China
KC, 1KC Rosava
.....Belaya Tserkov/Kiev, Ukraine
KD, 1KD Valsa Bila Tserkva Tyre
.....Belaya Tserkov/Kiev, Ukraine
KE, 1KE Shandong Jinyu Industrial Rubber Co. Ltd.
.....Dongying, Shandong, China
KF, 1KF Shandong Linglong Rubber Co. Ltd.
.....Zhaoyuan, Shandong, China
KH, 1KH Shandong Sangong Rubber Co. Ltd.
.....Shandong, China
KJ, 1KJ Shandong Province Sanli Tire Mfg. Co. Ltd.
.....Caoxian, Shandong, China
KK, 1KK Dalian Tyre Factory Co. Ltd.
.....Dalian, Liaoning, China
KL, 1KL Anlas Anadolu Lastik Sanayi ve Ticaret A.S.....Ulus, Istanbul, Turkey
KM, 1KM Goodyear
.....Colmar-Berg, Luxembourg
KN, 1KN Hangzhou Chaoyang Rubber Co. Ltd.
.....Hangzhou, Zhejiang, China
KP, 1KP Shandong Zhushenghua Rubber Co. Ltd.
.....Dongying, Shandong, China
KR, 1KR Wuxi Double Flying
.....Wuxi, China
KT, 1KT Da Nang Rubber
.....Danang, Vietnam
KU, 1KU Weifang Dawang Rubber Products Co. Ltd.
.....Changyi, Shandong, China
KV, 1KV Nanjing Tire Co. Ltd.
.....Nanjing, Jiangsu, China
KW, 1KW Shengtai Group Co. Ltd.
.....Dongying, Shandong, China
KX, 1KX Shandong New Dong Yue Group Co. Ltd.
.....Dongying City, Shandong, China
KY, 1KY Dongying Tiantong Rubber & Plastic Co. Ltd.
.....Dongying City, Shandong, China
K0, 1K0 Nexen Tire
.....Yang San, South Korea
K2, 1K2 Kumho

.....Ho Chi Minh City, Vietnam
K3, 1K3 Kenda Rubber.....Yuanlin, Taiwan
K4, 1K4 Michelin.....Queretaro, Mexico
K5, 1K5 Pneumant (Goodyear)
.....Fuerstenwalde, Germany
K6, 1K6 Qingzhou Hua Han Rubber Co. Ltd.
.....Qinzhou City, China
K7, 1K7 Foshan Shunde Tian Di Rubber Co. Ltd.
.....Foshan, Guangdong, China
K8, 1K8 Shandong Zhengfang Tyre Co. Ltd.
.....Taian, Shandong, China
K9, 1K9 Tech Rubber Co. Ltd.
.....Changhua, Taiwan

L

LA, 1LA Wuxi Yangfang Rubber Engineering Co. Ltd.
.....Wuxi, Jiangsu, China
LB, 1LB Shandong Fengyuan Tyre Mfg. Co. Ltd.
.....Zahzhuang City, Shandong, China
LC, 1LC Casumina
.....Ho Chi Minh City, Vietnam
LD, 1LD Zhejiang Wanxin Rubber Co. Ltd.
.....Xianju, Zhejiang, China
LE, 1LE Weifang Lutong Rubber Co. Ltd.
.....Weifang, Shandong, China
LF, 1LF Continental
.....Hannover, Germany
LH, 1LH Speedways Rubber Co.
.....Jalandhar, India
LJ, 1LJ Schefer Comercio Internacional
.....Pinhais, Parana, Brazil
LL, 1LL Continental.....Clairoix, France
LM, 1LM Continental.....Aachen, Germany
LP, 1LP Shandong Zhenhai Group Co. Ltd.
.....Gaomi City, Shandong, China
LR, 1LR TVS Srichakra Ltd.
.....Tamil Nadu, India
LT, 1LT Goodyear.....Aapazari, Turkey
LU, 1LU Pirelli.....Valencia, Venezuela
LW, 1LW Trelleborg
.....Trelleborg, Sweden
L0, 1L0 Michelin.....Gravanches, France
L1, 1L1 Goodyear.....Taipei, Taiwan
L4, 1L4 Danubiana
.....Bucharest, Romania

L5, 1L5 BRISA (Bridgestone)
.....Izmit, Turkey
L6, 1L6 Continental.....Modipuram, India
L7, 1L7 Michelin.....Zalau, Romania

M

MA, 1MA Zhejiang Best Rubber Co. Ltd.
.....Shaoxing, Zhejiang, China
MB, 1MB Goodyear.....Akron/Plant 2
MC, 1MC Goodyear.....Danville, Va.
MD, 1MD Goodyear.....Gadsden, Ala.
ME, 1ME Zhejiang Yizheng Tyre Co.
.....Ruian, Zhejiang, China
MF, 1MF Danang Rubber J.S.C.
.....Danang, Vietnam
MH, 1MH Weifang Jingtong Da Tyre Co. Ltd.
.....Goomi City, Shandong, China
MJ, 1MJ Goodyear.....Topeka, Kan.
MK, 1MK Qingdao Taihao Tyre Co. Ltd.
.....Pingdu City, Qingdao, China
ML, 1ML P.T. Banteng Pratama Rubber
.....Bogor, Indonesia
MM, 1MM Kenda Rubber...Tianjin, China
MN, 1MN Dong Nai Rubber Factory (CASUMINA)
.....Dong Nai Province, Vietnam
MP, 1MP Binh Loi Rubber Factory
.....Ho Chi Minh City, Vietnam
MR, 1MR Qingdao Yellow Sea Tire Factory.....Qingdao/Shandong, China
MT, 1MT Suntop Tire (Wuxi) Co. Ltd.
.....Wuxi, Jiangsu, China
MU, 1MU Ruian Jianda Tyre Manufacture Co. Ltd.
.....Ruian, Zhejiang, China
MV, 1MV Shandong Wonbon Rubber Co. Ltd.
.....Dongying, Shandong, China
MW, 1MW Shenyang Peace Radial Tyre Mfg. Co. Ltd.
.....Shenyang, Liaoning
MX, 1MX Goodyear.....Sao Paulo, Brazil
MY, 1MY Goodyear.....Cali, Colombia
M1, 1M1 Laoling Vheal Rubber Co. Ltd.
.....Laoling City, China
M2, 1M2 Dongying Huantai Rubber Co. Ltd.
.....Dongying, China
M3, 1M3 Michelin.....Greenville, S.C.
M5, 1M5 Michelin
.....Waterville, Nova Scotia

M6, 1M6 Goodyear.....Lawton, Okla.
M7, 1M7 Goodyear.....Santiago, Chile
M8, 1M8 Premier Tyres
.....Kalamassery, India
M9, 1M9 Shandong Havsteyar Rubber Technology Co. Ltd.
.....Dongying City, Shandong, China

N

NA, 1NA Sumitomo
.....Fazenda Rio Grande, Brazil
NB, 1NB Goodyear
.....Wolverhampton, England
NC, 1NC Goodyear.....Amiens, France
ND, 1ND Goodyear
.....Philippsburg, Germany
NE, 1NE Gummiwerke Fulda (Goodyear).....Fulda, Germany
NF, 1NF Jinyong (Qingyuan) Rubber Industrial Co. Ltd.
.....Qingyuan City, Guangdong, China
NH, 1NH Qingdao Huasheng Rubber Co. Ltd.
.....Pingdu Qingdao City, China
NJ, 1NJ Goodyear
.....Colmar-Berg, Luxembourg
NK, 1NK Goodyear.....Hariana, India
NL, 1NL Goodyear.....Bogor, Indonesia
NM, 1NM Tianjin Xieli Rubber Product Ltd. Co.....Tianjin, China
NN, 1NN Chongqing Dragon Rubber-Products Co. Ltd.
.....Changshou/Chongqing, Chongqing, China
NP, 1NP I-Greatest Rubber Ind. Co. Ltd.
.....Mexico City, Mexico
NR, 1NR Shandong Rongcheng Tire Factory Co.
.....Rongcheng/Shandong, China
NT, 1NT Goodyear.....Lima, Peru
NU, 1NU Qingdao Honghua Tyre Factory
.....Qingdao City, China
NV, 1NV Weifang Huadong Rubber Co. Ltd.
.....Shouguang, Shandong, China
NW, 1NW Goodyear
.....Uitenhage, South Africa
NX, 1NX Weifang Angu Rubber Indus-

Continued on Page 26

Flatproofing

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Vehicles per tire/auto service outlet

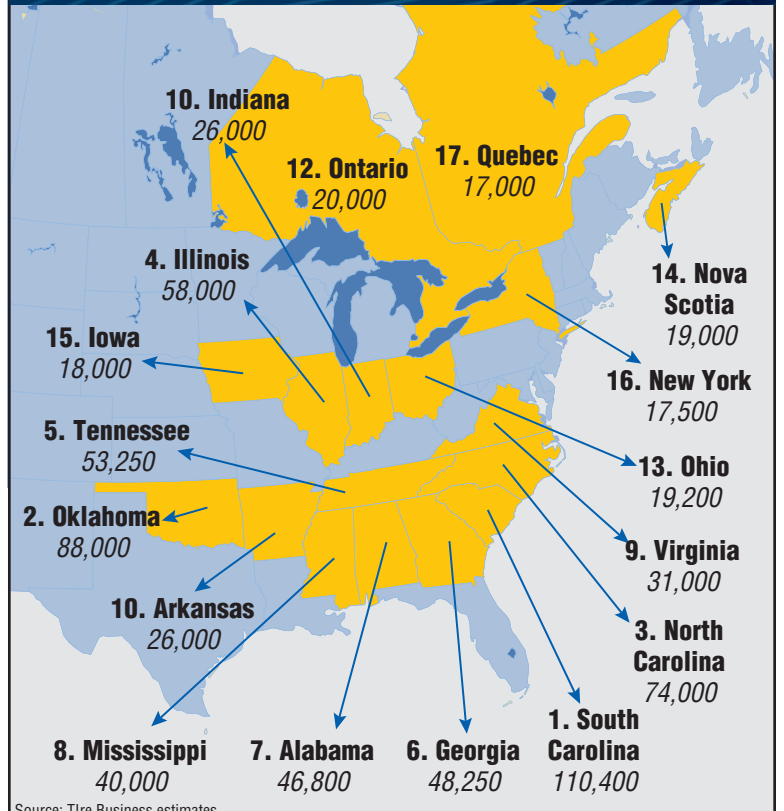
(Passenger, bus and truck vehicles)

State	Tire outlets	Vehicles* (000)	Vehicles per outlet
Alabama	1,131	4,993	4,415
Alaska	97	645	6,649
Arizona	937	6,353	6,751
Arkansas	616	2,705	4,391
California	4,956	31,637	6,383
Colorado	896	5,332	5,951
Connecticut	450	3,089	6,864
Delaware	139	858	6,173
District Of Columbia	22	349	15,863
Florida	3,297	16,953	5,142
Georgia	1,983	9,025	4,551
Hawaii	93	1,228	13,204
Idaho	239	1,772	7,414
Illinois	1,708	10,930	6,399
Indiana	1,016	6,338	6,238
Iowa	716	3,237	4,521
Kansas	678	2,885	4,255
Kentucky	754	4,092	5,427
Louisiana	894	3,868	4,327
Maine	240	1,279	5,329
Maryland	701	4,787	6,829
Massachusetts	691	5,368	7,768
Michigan	1,450	8,989	6,199
Minnesota	990	5,309	5,363
Mississippi	612	2,831	4,626
Missouri	1,299	5,738	4,417

State	Tire outlets	Vehicles* (000)	Vehicles per outlet
Montana	246	1,380	5,610
Nebraska	388	2,069	5,332
Nevada	384	2,339	6,091
New Hampshire	246	1,325	5,386
New Jersey	980	5,790	7,420
New Mexico	340	1,877	5,521
New York	1,819	11,989	6,590
North Carolina	1,956	8,795	4,496
North Dakota	197	848	4,305
Ohio	2,120	10,976	5,177
Oklahoma	736	4,510	6,103
Oregon	449	3,810	8,585
Pennsylvania	1,888	12,282	6,505
Rhode Island	100	878	8,780
South Carolina	950	4,813	5,066
South Dakota	186	1,001	5,382
Tennessee	1,246	6,009	4,823
Texas	4,435	22,423	5,056
Utah	487	2,613	5,366
Vermont	110	588	5,345
Virginia	1,328	7,636	5,750
Washington	785	6,391	8,141
West Virginia	292	1,630	5,582
Wisconsin	1,044	5,473	5,242
Wyoming	140	655	4,679
TOTAL	49,457	278,690	5,635

Source: InfoUSA 2019 data; U.S. Department of Transportation/Bureau of Labor Statistics - 2017 data *All vehicles with the exception of motorcycles.

Daily tire production by states/provinces



North American tire production facilities

Company/ plant location	Year opened	DOT code(s)	Employees (u=unionized)	Tire types*	Estimated capacity*
Canada					
Bridgestone Canada Inc. (Bridgestone Corp.)					
Joliette, Quebec	1966	VN,1VN,XY,1XY,9B,19B	1,200u	1,2 (r)	16,541 u/d
Goodyear Canada Inc. (Goodyear)					
Medicine Hat, Alberta	1960	PC,1PC	300u	1 (r,b)	13,000 u/d
Napanee, Ontario	1990	4B,14B	800	1 (r)	20,000 u/d
Michelin North America (Canada) Inc. (Group Michelin)					
Bridgewater, Nova Scotia	1973	B3,1BD	1,130	1,2 (r)	61,200 t/y
Granton-Pictou, Nova Scotia	1971	HN,1HN	615	1,2 (r)	9,000 t/y
Waterville, Nova Scotia	1982	M5,1M5	1,311	3 (r)	117,500 t/y
Mexico					
Bridgestone de Mexico S.A. de C.V. (Bridgestone Corp.)					
Cuernavaca	1980	V6,1V6	1,115u	1,2 (r)	21,000 u/d
Bridgestone Neumaticos de Monterrey S.A. de C.V. (Bridgestone Corp.)					
Monterrey	2007	RB,1RB	298u	1,2 (r)	6,600 u/d
Continental Tire de Mexico S.A. de C.V. (Continental A.G.)					
San Luis Potosi	1975	P5,1P5	1,500u	1,2 (r,b)	6.6 mil. u/y
Corporacion de Occidente S.A. de C.V. (Cooper Tire & Rubber Co.)					
El Salto	2008	RD,1RD,R7,1R7	1,380	1,2 (r)	19,000 u/d
Goodyear SLP s.r.l. de C.V. (Goodyear)					
San Luis Potosi	2017	1PL	1,000	1,2 (r)	6.0 mil. u/y
Industrias Michelin S.A. de C.V. (Group Michelin)					
Queretaro	1987	K4,1K4	427	1,2 (r)	6,000 u/d
Leon	2018	03L	1,000	1,2 (r)	4.5 mil. u/y
JK Tornel S.A. de C.V. (JK Tyre & Industries Ltd.)					
Mexico City	1972	5F,15F	402u	1,2,3,4,7 (b)	4,216 u/d
Tacuba	1946	AG,2A6	248	1,2,3 (b)	3,775 u/d
Tultilan	1984	4F,14F	797u	1,2,4,7 (r,b)	15,500 u/d
Pirelli Neumaticos S.A. de C.V. (Pirelli & C. S.p.A.)					
Silao	2012	UN,1UN	1,800	1,2 (r)	7.5 mil. u/y
United States					
Bridgestone Americas Tire Operations L.L.C. (Bridgestone Corp.)					
Akron, Ohio	1910	—	60u	9 (r)	120 u/d
Bloomington, Ill.	1965	2M, 12M, 3M, 13M	380u	6 (r,b)	300 u/d
Des Moines, Iowa	1945	YE, 1YE, YU, 1YU, VE	1,050u	4 (r,b)	4,000 u/d
Graniteville, S.C.	1998	7X,17X,8X, 18X,9X,19X	1,597	1,2 (r)	37,750 u/d
LaVergne, Tenn.	1972	D2,1D2,E3, 1E3,Y7,1Y7	679u	3 (r)	6,070 u/d
Morrison, Tenn.	1990	2C,12C,4D, 14D,5D,15D	933u	3 (r)	9,100 u/d
Trenton, S.C.	2014	—	420	6 (r)	68 t/d
Wilson, N.C.	1974	W2,1W2,Y3, 1Y3,0B,10B	1,800	1,2 (r)	33,025 u/d
Carlstar Group L.L.C.					
Clinton, Tenn.	1974	C4,1C4	500	4,7	10,200 u/d
Jackson, Tenn.	2011	P4,1P4	400	4,7 (r,b)	11,700 u/d

Company/ plant location	Year opened	DOT code(s)	Employees (u=unionized)	Tire types*	Estimated capacity*
Continental Tire the Americas Inc. (Continental A.G.)					
Mount Vernon, Ill.	1972	A3,1A3,3C, 13C,6B,16B	3,400	1,2,3 (r)	16.6 mil. u/y
Sumter, S.C.	2014	VY,1VY	1,070	1,2 (r)	4.0 mil. u/y
Cooper Tire & Rubber Co.					
Findlay, Ohio	1914	UP,1UP	1,060u	1,2 (r)	18,000 u/d
Texarkana, Ark.	1964	UT,1UT	1,675u	1,2 (r)	26,000 u/d
Tupelo, Miss.	1984	U9,1U9	1,349	1 (r)	37,000 u/d
Giti Tire (USA) Ltd. (Giti Tire Group)					
Richburg, S.C.	2017	01B	1,700	1,2 (r)	5.0 mil. u/y
Goodyear Tire & Rubber Co.					
Akron, Ohio	1983	MB,1MB	375u	9 (r)	2,000 u/d
Danville, Va.	1966	MC,1MC	2,300u	3,8 (r,b)	10,000 u/d
Fayetteville, N.C.	1969	PJ,1PJ	2,900u	1,2 (r)	40,000 u/d
Gadsden, Ala.	1929	MD,1MD	1,600u	1,2 (r)	25,000 u/d
Lawton, Okla.	1978	M6,1M6	2,800	1,2 (r)	65,000 u/d
Topeka, Kan.	1944	MJ,1MJ	1,600u	2,3,6 (r,b)	7,000 u/d
Hankook Tire Manufacturing Tennessee L.P. (Hankook Tire Co. Ltd.)					
Clarksville, Tenn.	2016	00T	1,200	1,2 (r)	5.5 mil. u/y
Hoosier Racing Tire Corp. (Continental A.G.)					
Plymouth, Ind.	1979	J7,1J7	300	9 (r,b)	—
Kumho Tire Georgia Inc. (Kumho Tire Co. Inc.)					
Macon, Ga.	2016	000	360	1,2 (r)	4.0 mil. u/y
Michelin North America Inc. (Group Michelin)					
Ardmore, Okla.	1969	AP,1AP	1,815	1,2 (r)	23,000 u/d
Dothan, Ala.	1979	B7,1B7	546	2 (r)	6,800 u/d
Fort Wayne, Ind.	1961	BF,1BF	1,600u	1,2 (r)	21,000 u/d
Greenville, S.C.	1975	M3,13M,4M,14M	1,569	1,2 (r)	27,000 u/d
Lexington, S.C.	1981	B9,1B9	3,185	1,2,6 (r)	268,200 t/y
Norwood, N.C.	1987	—	443	8 (b)	5,900 t/y
Spartanburg, S.C.	1978	B6,1B6	1,092	3 (r)	7,000 u/d
Starr, S.C.	2013	—	—	6 (r)	—
Tuscaloosa, Ala.	1945	BE,1BE	1,344u	1,2 (r)	15,000 u/d
Mitas Tires North America Inc. (Trelleborg A.B.)					
Charles City, Iowa	2012	UD,1UD	237	4 (r)	13,500 t/y
Pirelli Tire L.L.C. (Pirelli & C. S.p.A.)					
Rome, Ga.	2002	JR,1JR	250	1,2 (r)	400,000 u/y
Specialty Tires of America Inc.					
Indiana, Pa.	1915	CY,1CY	300	2,4,6,7,8,9 (b)	3,300 u/d
Unicoi, Tenn.	1997	3U,13U	200	2,4,6,7 (b)	400,000 u/y
Sumitomo Rubber USA L.L.C. (Sumitomo Rubber Industries Ltd.)					
Tonawanda, N.Y.	1999	DA,1DA	1,300u	1,2,3,5 (r,b)	2,700 t/m
Titan Tire Corp.					
Bryan, Ohio	1966	A9,1A9	220u	4,6,7 (r,b)	450 u/d
Des Moines, Iowa	1943	CF,1CF	600u	2,4,6,7 (r,b)	13,000 u/d
Freeport, Ill.	1964	PK,1PK	600u	4,6,7 (r,b)	10,000 u/d
Toyo Tire North America Manufacturing Inc. (Toyo Tire & Rubber Co. Ltd.)					
White, Ga.	2005	73,173	1,000	1,2 (r)	11.5 mil. u/y
Trelleborg Wheel Systems Americas L.L.C. (Trelleborg A.B.)					
Spartanburg, S.C.	2015	01H	150	4 (r)	—
Yokohama Tire Corp. (Yokohama Rubber Co. Ltd.)					
Salem, Va.	1968	CC,1CC	910u	1,2 (r)	6.2 mil. u/y
West Point, Miss.	2015	JAC	500	3 (r)	1.0 mil. u/y

Explanation of abbreviations
TIRE TYPES: 1—Auto; 2—Light Truck; 3—Truck/bus; 4—Agricultural; 5—Motorcycle; 6—Earthmover/OTR; 7—Industrial; 8—Aircraft; 9—Racing
TIRE CONSTRUCTION: r—Radial; b—Bias-ply **PLANT CAPACITIES:** u/d—Units per day; u/y—Units per year; t/y—Tons per year
 Names in parentheses following company names indicate the parent company.

North America's Largest Retreaders

(Based on tread rubber used during last full year – 2017)

Medium & Heavy Truck Tires

Rank 2018	Company/Headquarters	Pounds/year (in millions)	% Change	Units/day	Plants #	Days/Week	Shifts	Curing processes †	2017 Rank
1T	Goodyear Commercial Tire Systems L.L.C. ¹ Fort Smith, Ark.	*28.00	N.A.	4,384	27	N.A.	N.A.	GY p.c. & m.c. GY Unicircle (25 plants)	1
1T	Southern Tire Mart L.L.C. Columbia, Miss.	28.00	N.C.	4,610	18	5	1 to 2	Bandag	2
3	Snider Fleet Solutions ² Greensboro, N.C.	*26.00	60.0%	3,500	11	5 to 6	2 to 3	MRT (10), Oliver (1)	4
4	GCR Tires & Service ³ Nashville, Tenn.	*20.00	N.A.	*3,000	29	N.A.	N.A.	Bandag	3
5	Pomp's Tire & Auto Service Inc. ⁴ Green Bay, Wis.	*16.50	32.5%	2,750	15	5	1 to 2	Bandag	7
6	Best One Tire & Service ⁵ Indianapolis, Ind.	15.60	N.C.	2,325	17	5	1 to 2	Bandag	5
7	McCarthy Tire Service Co. Inc. ⁶ Wilkes-Barre, Pa.	12.00	4.3%	2,100	8	5	1 1/2	Bandag	8
8	Les Schwab Tire Centers Bend, Ore.	*11.10	N.A.	*1,550	3	N.A.	N.A.	Oliver; M-RTS; Galgo	9
9	Kal Tire ⁷ Vernon, British Columbia	10.30	N.A.	N.A.	10	N.A.	N.A.	Bandag	10
10	T&W Tire ⁸ Oklahoma City, Okla.	8.00	N.A.	1,000	4	5	2	MRT	N.R.
11	Service Tire Truck Centers Inc. Bethlehem, Pa.	7.70	-3.8%	1,000	4	5	2 1/2	MRT (3), Oliver (1)	11
12	Bauer Built Inc. Durand, Wis.	7.00	N.C.	1,000	7#	5 1/2	1 to 2	MRT	13
13	Love's Travel Stops & Country Stores Inc. ⁹ Oklahoma City, Okla.	*7.00	N.A.	*1,000	4	N.A.	N.A.	Oliver	N.R.
14	Purcell Tire & Rubber Co. Potosi, Mo.	6.40	4.9%	890	4	6	2	GY m.c. & p.c.	14T
15T	Bob Sumerel Tire Co. Inc. ¹⁰ Erlanger, Ky.	6.30	23.5%	992	5	5	1 1/2	Bandag	16
15T	Boulevard Tire Center Deland, Fla.	6.30	3.3%	992	5	5	1	Bandag	14T
17T	Parkhouse Tire Inc. Bell Gardens, Calif.	6.00	20.0%	800	2	5	1 1/2	Bandag	18
17T	TCi Tire Centers L.L.C. ¹¹ Duncan, S.C.	*6.00	-60.0%	*1,000	9	N.A.	N.A.	MRT	6
19	Tredroc Tire Services ¹² Antioch, Ill.	5.50	-25.7%	1,000	5	5	1	Bandag	12
20	Jack's Tire & Oil Inc. Logan, Utah	4.90	4.3%	650	5	5	1	MRT	17

* = estimated; N.A. = not available; N.R. = Not Ranked in 2017
 # = Some plants may produce other types of retreads
 † = GY=Goodyear; MRT=Michelin Retread Technologies; M-RTS=Marangoni RingTread System; p.c.= precure; m.c.= mold cure
 1 – Goodyear subsidiary; Goodyear Canada also operates one OTR retread plant.
 2 – Snider acquired 27 commercial centers (including 4 retread plants) from TCi Tire Centers, Q3 2017.
 3 – Data cover GCR Truck Tire Centers in the U.S. and Canada, Tire Distribution Systems and White Tire L.L.C. 2017 production estimate based on previous years' data and revised number of plants.
 4 – Pomp's acquired Cross-Midwest Tire Co. (13 locations; \$135M annual sales; 3 Bandag retread plants) in Q4 2016.
 5 – Includes sales/production of Southern Indiana Tire, Tommy House Tire, Huber Tire, Zurcher Tire, Southern Illinois Tire, etc.
 6 – McCarthy acquired 6 GCR locations in Md., N.Y. and Pa. (including 1 retread plant) in Q3 2017.
 7 – Also operates OTR retread plants in Kamloops, British Columbia, and Oshawa, Ontario (Polar Rubber Products).
 8 – T&W acquired 16 commercial centers and 2 retread plants from TCi Tire Centers, Q3 2017.
 9 – Love's opened its first retread plant in mid-2016 and three others later. Estimated production based on rated plant capacities at a reduced rate of production.
 10 – Separate company from Bob Sumerel Tire & Auto Service; not affiliated with Sumerel Tire Service Inc. of Newport, Ky.
 11 – Michelin North America subsidiary; phased out of the commercial sales/retreading business during 2017. Sold 27 commercial centers (including 4 retread plants) to Snider Fleet, Q3 2017; sold 16 centers (including 2 retread plants) to T&W Tire, Q3 2017; sold four centers (including 1 retread plant) to Shrader Tire & Oil, Q4 2017; sold one center to Meehof Tire, Q4 2017.
 12 – Tredroc integrated Belle Tire's commercial activities, Q2/Q3 2016, including 2 Bandag retread plants.

Off-The-Road Tires

Rank 2018	Company/Headquarters	Pounds/year (in millions)	% Change	Units/day	Plants #	Days/Week	Shifts	Curing processes †	2017 Rank
1T	NRI Inc. Portland, Ore.	*7.00	N.C.	N.A.	1	N.A.	N.A.	m.c., p.c., sculpture	1
1T	Purcell Tire & Rubber Co. Potosi, Mo.	7.00	1.4%	119	1#	6	2	m.c., flexcure, sculpture	2
3	RDH Tire Co. Cleveland, N.C.	5.00	N.C.	50	1	5	3	Marangoni m.c. cut tread	3
4	H&H Industries Inc. Oak Hill, Ohio	4.90	-4.4%	50	1	5 1/2	3	m.c., p.c., cut tread	5
5	B.R. Retreading Inc. Glasgow, Ky.	*4.00	-20.0%	55	1	5	2	Marangoni, m.c., cut tread	4

* = estimated N.A. = not available; N.C. = no change;

Passenger & Light Truck Tires

Rank 2018	Company/Headquarters	Pounds/year (in millions)	% Change	Units/day Passenger/Light Truck	Plants #	Days/Week	Shifts	Curing processes †	2017 Rank
1T	Eastern Tire Service Ltd. New Glasgow, Nova Scotia	*1.50	N.C.	600 / 100	1	5	2	Italmatic B to B	1T
1T	Techno Pneu Inc./Moldex Rimouski, Quebec	*1.50	N.C.	225 / 225	1	5	3	CIMA m.c.	1T
3	Tread Wright Inc. Houston	*1.25	N.A.	000 / 250	1	5	–	m.c.(CIMA)	3
4	Mt. Morris Tire Service Inc. Mt. Morris, Pa.	*0.80	N.A.	150 / 225	1	5	2	m.c. (Cima/REI)	5
5	Pomp's Tire & Auto Service Inc. Green Bay, Wis.	*0.75	N.A.	000 / 200	15	5	1 to 2	Bandag	N.R.

Market Data Book

Tire Plant Codes

Continued from Page 23

try Co. Ltd.
 ..Shouguang City, Shandong, China
NY, 1NY Goodyear.....Bangkok,Thailand
N3, 1N3 Toyo Tire.....Kuwana, Japan
N4, 1N4 Victoria (Michelin)
Floresti, Romania
N5, 1N5 Pneumant (Goodyear)
Riesa, Germany
N6, 1N6 Reifen Heidenau
Heidenau, Germany
N7, 1N7 Caracal.....Caracal, Romania
N8, 1N8 Shandong Cascen Rubber Ind. Ltd.....Zaozhuang City, China
N9, 1N9 Pirelli
Feira de Santana/ Bahia, Brazil

P

PA, 1PA Goodyear.....Izmit, Turkey
PB, 1PB Goodyear.....Valencia, Venezuela
PC, 1PC Goodyear
Medicine Hat, Alberta
PD, 1PD Xinjiang Kunlun Engineering Tyre Co. Ltd.....Korle City, China
PE, 1PE MRF Ltd. Perambalur, Tamil Nadu, India
PF, 1PF Qingdao Huawu Rubber & Plastic Co. Ltd.....Qingdao, Shandong, China
PH, 1PH Dongying Durun Tyre Co. Ltd.....Dawang, Dongying, China
PJ, 1PJ Goodyear.....Fayetteville, N.C.
PK, 1PK Titan Tire.....Freeport, Ill.
PM, 1PM Qingdao Chengtai Hand Truck Co. Ltd.
Jiaonan Qingdao, Shandong, China
PN, 1PN Sifute Industrial Group Ltd.
Shandong, China
PP, 1PP Shandong Guofeng Rubber & Plastic Co. Ltd.
Dawang, Guangrao, China

PR, 1PR Weihai Pingan Tyre Co. Ltd.
Rongcheng, China
PT, 1PT Ceat Ltd.
Baroda, Gujarat, India
PU, 1PU Arai Shoji Co. Ltd.
Minato-Ku (Tokyo), Japan
PV, 1PV Cenchelyn Tire Co. Ltd.
Jimo, Shandong, China
PW, 1PW Toyo.....Hyogo, Itami, Japan
PX, 1PX Techno Innovative Rubber Enterprise Inc.....Scarborough, Ontario
PY, 1PY Weifang Huari Rubber Co. Ltd.....Shouguang City, Shandong
P0, 1P0 Apollo Tyres Ltd.
Sriperumbudur, Tamil Nadu, India
P1, 1P1 Goodyear.....Hebron, Ohio
P2, 1P2 Cenchelyn Tire Co. Ltd.
Jimo, Shandong, China
P4, 1P4 Carlstar Group.....Jackson, Tenn.
P5, 1P5 Continental Tire de Mexico
San Luis Potosi, Mexico
P6, 1P6 Yonkang City Huajin Silicon Rubber Co. Ltd.....Yonkang, China
P7, 1P7 Maggion Industrias de Pneus e Maquinas Ltd.....Guarulhos, Brazil
P8, 1P8 Qingdao Rubber
Qingdao, China
P9, 1P9 MRF Ltd.....Kottayam, India

R

RA, 1RA Taizhou Renli Tire Co. Ltd.
Taizhou, China
RB, 1RB Bridgestone
Cienega de Flores, Mexico
RC, 1RC Qingdao Mao Xing Rubber Co. Ltd.....Qingdao, China
RD, 1RD Corporacion de Occidente (Cooper).....El Salto, Mexico
RE, 1RE Qingdao Elite Rubber Co. Ltd.Qingdao, China
RF, 1RF Qingdao Tianchi Tyre Co. Ltd.
Qingdao, China
RH, 1RH Qingdao Huashi Industrial Products Co. Ltd.....Qingdao, China
RJ, 1RJ Anlas Anadolu Lastik Sanayii ve Ticaret A.S.....Duzce, Turkey
RK, 1RK Innovative Tyres & Tubes Ltd.
Halol, Gujarat, India
RL, 1RL International Machinery & Equipment (Zhengzhou) Co. Ltd.

.....Zhengzhou, Henan, China
RM, 1RM Cooper Kunshan Tire
Kunshan, China
RP, 1RP Taizhou Taiyangfeng Rubber Co. Ltd.....Xianju County, China
RR, 1RR Belshina.....Bobruisk, Belarus
RT, 1RT Dongguan Huacheng Tyre Factory.....Donguang, Guangdong, China
RU, 1RU Rekord Gummi
Belgrade, Serbia
RV, 1RV Eternal Rise Tyre (Tianjin) Co. Ltd.....Tianjin, China
RW, 1RW Societe Tunisienne des Industries de Pneumatique (STIP)
Sousse, Tunisia
RX, 1RX PRS Tyres Ltd.
Rasipuram, Tamil Nadu, India

RY, 1RY Shandong Changfeng Tyres Co. Ltd.....Dongying, Shandong, China
R0, 1P0 Amerityre Corp.
Boulder City, Nev.
R1, 1R1 Dezhou Linglong Tyre Co. Ltd.....Dezhou, China
R2, 1R2 Tianjin Zhenxin Rubber Co. Ltd.Tianjin, China
R3, 1R3 Zheijiang Xinchang Zhongya Industry.....Xinchang, China
R4, 1R4 Shandong Shifeng (Group) Co. Ltd.....Gaotang, China
R5, 1R5 Shandong Hengyu Rubber Co. Ltd.....Guangrao, China
R6, 1R6 Qingdao Chongkun Industrial Development.....Qingdao, China
R7, 1R7 Corp. de Occidente (Cooper)
El Salto, Mexico
R8, 1R8 Sumitomo.....Rayong, Thailand
R9, 1R9 Taizhou Julun Tyre Co. Ltd.
Lunan/Taizhou, China

T

TA, 1TA Wendeng Sanjing Chemistry Co. Ltd.....Wendeng, Shandong, China
TB, 1TB Sentaيدا Group Co.
Jimo, Shandong, China
TC, 1TC Goodyear.....Pulandian, China
TD, 1TD Acme Rubber Ind. Co. Ltd.
Tianjhong, Changhua, Taiwan
TE, 1TE CST Rubber (Zhangzhou) Ind. Ltd....Gangwei, Longhai, Fujian, China
TF, 1TF Qingdao Qianzhen Tyre Co. Ltd....Pingdu City, Shandong, China
TH, 1TH Weifang Longshan Tyre Co. Ltd.....Gaomi, Shandong, China
TJ, 1TJ Chaoyang Long March Tyre New Co. Ltd....Chaoyang, Liaoning, China
TK, 1TK Yokohama.....Lipetsk, Russia
TL, 1TL Sichuan Kalevei Technology Co. Ltd....Jianyang, Sichuan, China
TM, 1TM Bridgestone
Huizhou, Guangdong, China
TN, 1TN Weifang Huantai Rubber Co. Ltd....Changyi City, Shandong, China
TP, 1TP Double Coin Group (Chongqing) Tire Co. Ltd....Shanghai, China
TR, 1TR Qingdao Shuanghe Tyre Co. Ltd.....Pingdu, Shandong, China
TT, 1TT Shandong Deruibao Tire Co. Ltd.....Guangrao, Qingdao, China
TU, 1TU Qingdao Morewin Rubberware Co. Ltd.....Jiaonan, Qingdao, China
TV, 1TV Shandong O'Green Tyres Co. Ltd.....Dongying, Shandong, China
TW, 1TW Weifang Shunfuchang Rubber & Plastic Co. Ltd.
Shouguang, Shandong, China
TX, 1TX Wiegeler Rubber Co. Ltd.
Handan, Hebei, China
TY, 1TY Wiegeler Rubber Co. Ltd.
Pindgu, Shandong, China
T1, 1T1 Hankook.....Seoul, South Korea
T2, 1T2 Stomil (Michelin)
Olsztyn, Poland
T3, 1T3 TC Debica (Goodyear)
Debica, Poland
T5, 1T5 Tigar Tyres (Michelin)
Pirost, Serbia
T6, 1T6 Qingdao Yuanda Tyre Co. Ltd.
Pingdu, Shandong, China
T7, 1T7 Hankook.....Taejeon, South Korea
T8, 1T8 Goodyear.....Selangor, Malaysia

T9, 1T9 MRF Ltd.....Goa, India

U

UA, 1UA Nexen
Changnyeong-gun, South Korea
UB, 1UB Shandong Hengyu Science & Technology Co. Ltd.
Dawang, Shandong, China
UC, 1UC Shandong Fuyu Bluestone Tyre Co. Ltd...Zibo, Shandong, China
UD, 1UD Mitas Tires North America Inc.....Charles City, Iowa
UE, 1UE Tiumsun Rubber Tire (Weihai) Co. Ltd.....Weihai, China
UF, 1UF Shaanxi Yanchang Petroleum Group Rubber Co.
Xianyang, Shaanxi, China
UH, 1UH Shandong Yinuo Engineering Tyre Co. Ltd.
Tengzhou City, Shandong, China
UJ, 1UJ China National Tyre & Rubber Guilin Co. Ltd.....Suqiao, Guilin, China
UK, 1UK Toyama Tyre Corp. Ltd.
Beijing, China
UL, 1UL Cheng Shin Tire
Chongqing, China
UN, 1UN PirelliSilao, Mexico
UP, 1UP Cooper.....Findlay, Ohio
UR, 1UR Good Friend Tyre Co. Ltd.
Jiaozuo, Henan, China
UT, 1UT Cooper.....Texarkana, Ark.
UV, 1UV Kzowa Rubber...Osaka, Japan
UW, 1UW Okada Tire.....Tokyo, Japan
UX, 1UX Federal.....Taipei, Taiwan
UY, 1UY Cheng Shin Rubber
Yuanlin, Taiwan
U1, 1U1 Lien Shin Tire...Taipei, Taiwan
U2, 1U2 Sumitomo...Shirakawa, Japan
U3, 1U3 Cooper.....Krusevac, Serbia
U8, 1U8 Nankang...Hsin Fung, Taiwan
U9, 1U9 Cooper.....Tupelo, Miss.

V

VA, 1VA Sumitomo
Amphur Pluakdaeng, Rayong, Thailand
VB, 1VB Anhui Darui Rubber Co. Ltd.
Wuhu, Anhui, China
VC, 1VC Shandong Haoyu Rubber Co.
Guangrao County, Shandong, China
VD, 1VD Qingdao Hongchi Tyre Co. Ltd.....Pingdu, Qingdao, China
VE, 1VE Bridgestone...Des Moines, Iowa
VF, 1VF Weifang Zhenfu Industrial Co. Ltd.
Gaomi City, Shandong, China
VH, 1VH Sumitomo
Changsha, Hunan, China
VJ, 1VJ Aeolus Tyre Co. Ltd.
Jiaozuo, Henan, China
VK, 1VK Qingdao Yuanzhou Rubber Products Co. Ltd.
Jiaonan, Shandong, China
VL, 1VL Continental.....Kaluga, Russia
VM, 1VM Zhucheng Guoxin Rubber Co. Ltd.....Zhucheng, Shandong, China
VN, 1VN Bridgestone.....Joliette, Quebec
VP, 1VP Bridgestone.....Bari, Italy
VR, 1VR Bridgestone
Tatabanya, Hungary
VT, 1VT Bridgestone.....Bilbao, Spain
VV, 1VV Briland Rubber Tire Co. Ltd.
Wenzhou, China
VW, 1VW Sumitomo...Izumi-ohsu, Japan
VX, 1VX Weihai Huamao Rubber Science & Technology
Weihai, Shandong, China
VY, 1VY Continental.....Sumter, S.C.
V2, 1V2 Volzhsky Tire...Volzhsky, Russia
V3, 1V3 Ta Hsin Tire.....Taipei, Taiwan
V4, 1V4 Sumitomo.....Miyazaki, Japan
V6, 1V6 Bridgestone
Cuernavaca, Mexico
V7, 1V7 Voronezhsky Tire
Voronezh, Russia
V8, 1V8 Michelin
Gummipoondi Taluk Tiruvallur, India

W

WA, 1WA Bridgestone
Bethune, France

WB, 1WB Bridgestone
San Jose, Costa Rica
WC, 1WC Sumitomo
Rio Grande, Parana, Brazil
WD, 1WD Hebei Tianrui Rubber Co. Ltd.....Handan, Hebei, China
WE, 1WE Nankang...West Taipei, Taiwan
WF, 1WF Bridgestone...Burgos, Spain
WH, 1WH Shandong Fenglun Tyre Co. Ltd....Zaozhuang, Shandong, China
WJ, 1WJ Shanghai Hanghong Rubber Manufactory.....Shanghai, China
WK, 1WK Wuyi Fengyuan Mining Machine Manufactory Co. Ltd.
Wuyi, Zhejiang, China
WL, 1WL Ningbo Hualin
Yuyao, Zhe Jiang, China
WN, 1WN Trelleborg Wheel.
Xingtai, Hebei, China
WP, 1WP Guangzhou South China Tire & Rubber Co. Ltd.
Aotou, Guangdong, China
WR, 1WR JK Tyre & Industries
Kancheepuram, Tamil Nadu, India
WT, 1WT MRF Ltd.....Madras, India
WU, 1WU Ceat Tyres.....Bombay, India
WV, 1WV General Rubber
Taiping, Taipei, Taiwan
WY, 1WY Corp. de Occidente (Cooper)
Guadalajara, Mexico
W0, 1W0 Inoue Rubber
Bangkok, Thailand
W1, 1W1 Bridgestone.....La Vergne, Tenn.
W2, 1W2 Bridgestone.....Wilson, N.C.
W5, 1W5 Bridgestone
Buenos Aires, Argentina
W7, 1W7 Jiangsu Chengtong Tire Co. Ltd.....Xuzhou, China
W8, 1W8 Siam Tire...Bangkok, Thailand
W9, 1W9 Bridgestone
Maharashtra, India

X

XA, 1XA Pirelli.....Bollate, Italy
XB, 1XB Pirelli
Settimo Veicoli/Turin, Italy
XC, 1XC Trelleborg.....Tivoli, Italy
XD, 1XD Pirelli
Wanakerta Purwadadi, Subang, Indonesia
XE, 1XE Prometeon Tyre (ex-Pirelli)
Gravatai, Brazil
XH, 1XH Pirelli.....Kirov, Russia
XJ, 1XJ Prometeon Tyre (ex-Pirelli)
Izmit, Turkey
XK, 1XK Prometeon Tyre (ex-Pirelli)
Sao Paulo, Brazil
XL, 1XL Pirelli.....Sao Paulo, Brazil
XM, 1XM Pirelli.....Merlo, Argentina
XN, 1XN Pirelli.....Carlisle, England
XP, 1XP Pirelli...Burton-on-Trent, England
XR, 1XR Qingdao Morechi Rubber Co. Ltd.....Jiaonan, Shandong, China
XT, 1XT Pirelli.....Breuberg, Germany
XU, 1XU Dongying Zhongyi Rubber Co. Ltd....Dongying, Shandong, China
XV, 1XV Tolins Tyres Pvt. Ltd.
Kadapa, Kerala, India
XW, 1XW Qingzhou Huachen Rubber Co. Ltd.....Qingzhou, Shandong, China
XX, 1XX Bandag (Bridgestone)
Muscatine, Iowa
XY, 1XY Bridgestone...Joliette, Quebec
X0, 1X0 Nizhnekamskshina
Nizhnekamsk, Russia
X1, 1X1 Tong Shin Chemical
Seoul, South Korea
X2, 1X2 Hwa Fong Rubber
Yuanlin, Taiwan
X3, 1X3 Rosava Belaya.....Tserkov, Ukraine
X4, 1X4 Pars Tyre.....Savah, Iran
X5, 1X5 JK Industries.....Kankroli, India
X6, 1X6 Belshina.....Bobruysk, Byelorussia
X7, 1X7 Chimkentsky Tire
Chimkent, Kazakhstan
X8, 1X8 Dneproshina
Dnepropetrovsk, Ukraine
X9, 1X9 Moscow Tire...Moscow, Russia

Y

YA, 1YA MRF Ltd.
Perambalur, Tamil Nadu, India
YB, 1YB PirelliVoronezh, Russia
YC, 1YC Shandong Linglong Tyre
Sriracha, Chonburi, Thailand
YE, 1YE Bridgestone
Des Moines, Iowa
YH, 1YH Numsiam Rubber (Laos) Co. Ltd.
Spen District, Savannakhet, Laos
YJ, 1YJ Sailun (Vietnam) Co. Ltd.
Dong Ward, Tay Ninh, Vietnam
YK, 1YK Shandong Anchi Tyres Co. Ltd.
Zhucheng City, Shandong, China
YL, 1YL Nokian Tyres.....Nokia, Finland
YM, 1YM Yokohama
District Jhajjar, India
YN, 1YN Aung Htet Myet Co. Ltd.
Yangon, Myanmar
YP, 1YP Hangzhou Shunyu Tire Manufactory Co. Ltd.....Hangzhou, China
YR, 1YR Qingdao Huada Rubber Production Co. Ltd.
Jiaonan, Shandong, China
YT, 1YT Birla Tyres
Hardwar, Uttar Khand, India
YU, 1YU Bridgestone
Des Moines, Iowa
YV, 1YV Longkou Yongan Vehicle Window Co. Ltd.....Longku City, China
YW, 1YW Anhui Heding Tires Technology Co. Ltd....Bengbu, Anhui, China
YX, 1YX Nizhnekamsk Truck Tire Plant Ltd.....Nizhnekamsk, Russia
YY, 1YY Nizhnekamsk All Steel Tires Plant Ltd. (NASTP)
Nizhnekamsk, Russia
Y0, 1Y0 Kumho.....Koksung, S.Korea
Y1, 1Y1 Goodyear.....Americana, Brazil
Y2, 1Y2 Bridgestone.....Wilson, N.C.
Y3, 1Y3 Shandong Goodyear Rubber Co. Ltd.....Dezhou, China
Y4, 1Y4 ATC Tires (Yokohama)
Mumbai, India
Y5, 1Y5 MichelinShanghai, China
Y6, 1Y6 Continental
Kedah, Malaysia
Y7, 1Y7 Bridgestone
LaVergne, Tenn.
Y8, 1Y8 Bombay Tyre...Bombay, India
Y9, 1Y9 P.T. Gajah Tunggal
Tangerang, Indonesia

Numbers first codes

00A Zhucheng Yihesheng Rubber Co. Ltd.....Zhucheng City, China
00B CASUMINA.....Uyen Town, Vietnam
00C Delun Tire Co. Ltd.Chuzhou, China
00D Jilin Jixing Tire Co. Ltd.
Gaoxin District, China
00E Link Fortune Tyre Tube Co. Ltd.
Huyen Go Dao, China
00F OJSC Omskshina
Omsk, Russia
00H Ningbo Fleming Machine Co. Ltd.
Ningbo, China
00J Joyall (Weihai) Tire Co. Ltd.
Weihai, China
00K Zhongce Rubber (Thailand) Co. Ltd.....Pluakdaeng, Thailand
00L Dongying Monday Rubber Technology Co. Ltd.....Dongying, China
00M Qingdao Fleming Tyre Co. Ltd.
Qingdao, China
00N Rizhao Fleming Rubber Co. Ltd.
Rizhao, China
00P Tristar Tyre Factory
Insein Township, Myanmar
00R Ceat Kelani
Kelaniya, Sri Lanka
00T HankookClarksville, Tenn.
00U Ozka Lastik ve Kauчук San Tic S.A.Kocaali, Turkey
00V Qingdao Kunhua Machinery Co. Ltd.....Qingdao City, China
00W Qingdao Fleming Tyres Co. Ltd.
Qingdao, China
00X Yongan Fleming Fujian Co. Ltd.
Yongan, China
00Y Ace Tyre Ltd.....Medak Dist, India

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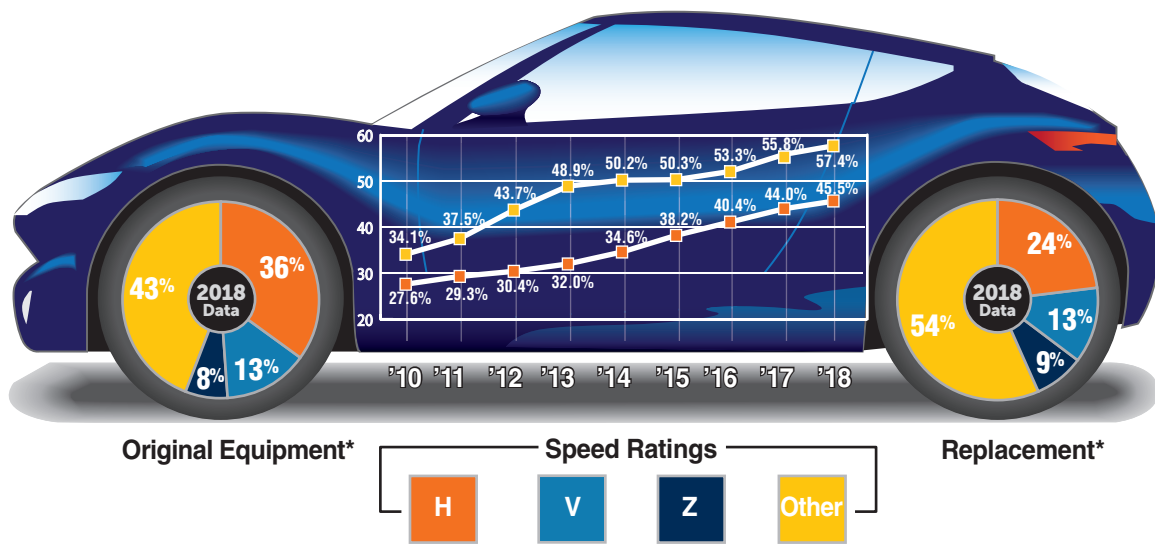
Tire Market Facts

U.S. high-performance tire trends

	2018*	2017	2016	2015	2014	2013	2012	2011	2010
Original Equipment (millions of units)									
H-rated	16.6	16.0	16.7	15.7	14.6	12.7	10.6	7.9	5.9
V-Rated	6.2	6.2	6.6	6.6	7.0	7.0	5.9	4.4	4.5
Z-Rated ¹	3.6	3.0	3.0	2.7	2.4	1.8	1.0	0.8	0.9
Performance subtotal	26.4	25.2	26.3	25.0	24.0	21.5	17.5	13.1	11.3
% of OE shipments	57.4%	55.8%	53.3%	50.3%	50.2%	48.9%	43.7%	37.5%	34.1%
Replacement (millions of units)									
H-rated	52.6	48.8	43.7	40.8	37.3	33.8	31.6	30.0	30.5
V-Rated	27.6	25.8	23.8	21.4	18.9	16.3	14.7	14.4	13.1
Z-Rated ¹	18.5	17.4	16.8	16.5	15.2	13.5	12.9	12.7	12.1
Performance subtotal	98.7	92.0	84.3	78.7	71.4	63.6	59.2	57.4	55.7
% of replacement shipments	45.5%	44.0%	40.4%	38.2%	34.6%	32.0%	30.4%	29.3%	27.6%
Import share (millions of units)									
Imports (17" & higher)	52.8*	46.0	40.7	35.4	28.8	24.1	21.3	19.2	17.0
% of performance sector	53.5%	50.0%	48.3%	45.0%	40.3%	37.9%	35.9%	33.3%	30.5%
Non-captive imports ²	N.A.	13.5	15.4	17.5	13.5	10.5	8.7	7.1	6.0
% of performance sector	—	14.5%	18.3%	22.2%	18.9%	16.5%	14.7%	12.4%	10.9%

Sources: U.S. Tire Manufacturers Association; Department of Commerce; Tire Business research
 1. Comprises W-, Y- and Z-rated tires.
 2. Imports from countries where local manufacturers don't have North American capacity; primarily China, Thailand, Indonesia, Taiwan, etc.
 *Preliminary data; subject to change.

U.S. performance market



Sources: U.S. Tire Manufacturers Association; Tire Business research

2017 market shares

Largest retail tire chains

Ranked by number of company-owned stores (at year-end 2018)

1 Walmart Stores Inc.¹	3,281	5 Discount Tire/America's Tire	1,020
Walmart	2,583	6 TBC Corp.⁵	731
Sam's Club	655	NTB	541
Walmart Canada	43	Tire Kingdom	190
2 Bridgestone Americas/Retail²	2,222	7 Mavis Discount Tire⁶	649
Firestone Complete Auto Care	1,763	Mavis, etc.	395
Tires Plus	400	Express Oil Change/Tire Engineers	185
Wheel Works	37	Kauffman Tire	69
Hibdon Tire	22	8 Goodyear⁷	569
3 Monro Inc.³	1,184	Goodyear Auto Service Ctrs.	487
Monro Auto Service & Tire	528	Just Tires	82
Mr. Tire	316	9 Costco Wholesale Inc.	528
Tire Choice	85	10 Canadian Tire Corp.	501
Tread Quarters	55	11 Les Schwab Tire Centers⁸	421
Tire Warehouse	53	12 Kal Tire	209
Car-X Tire	53	13 Sears Holdings Corp.⁹	200
Ken Towery's	38	14 Fountain Tire¹⁰	160
Tire Barn	30	15 Rent-A-Wheel / Rent-A-Tire	124
Autotire	26	16 Best One Tire & Service	117
4 Pep Boys — Manny, Moe & Jack⁴	975	17 Tire Discounters	113
Superstores	520	18 A.T.V. Inc./American Tire	107
Service & Tire Centers	455	19 Belle Tire Distributors	100
		20 Leeds West Groups¹¹	100

1 - Walmart and Sam's Clubs stores that sell tires.
 2 - Bridgestone also operates 200+ GCR and TDS stores in the U.S. and 36 GCR stores in Canada. Tires Plus total includes 38 Michel Tires Plus stores.
 3 - Also franchises 97 Car-X Tire locations.
 4 - Allied with AutoPlus parts stores; also franchises approx. 1,000 AAMCO, Cottman & Precision Tune brand outlets.
 5 - TBC also franchises 425+ Big O Tires outlets in the U.S. and Canada, as well as nearly 1,200 Midas stores.
 6 - Acquired Kauffman Tire Inc.'s retail business (69 stores) Jan. 2018 and Express Oil Change/Tire Engineers (185 stores) in Feb. 2018.
 7 - Goodyear is 50% owner of Fountain Tire.
 8 - Also operates 63 associate stores.
 9 - Sears is closing 34 more stores, Q1 2019.
 10 - Also operates 75 associate stores.
 11 - Midas International (88 stores) and Big O Tires (12) franchisee.

Top selling cars/light trucks 2018

United States			Canada		
	2018 Units	% chng	2018 Units	% chng	
Passenger Cars					
Toyota Camry	343,439	-11.3%	Honda Civic	69,005	0.0%
Honda Civic	325,760	-13.7%	Toyota Corolla/Matrix	48,796	-3.1%
Toyota Corolla	303,732	-7.7%	Hyundai Elantra	41,784	-9.4%
Honda Accord	291,071	-9.8%	Chevrolet Cruze	26,867	-2.4%
Nissan Sentra	213,046	-2.5%	Mazda 3	26,728	-4.1%
Nissan Altima	209,146	-18.0%	VW Golf/GTI	21,477	-12.7%
Hyundai Elantra	200,415	1.1%	Toyota Camry	14,588	0.1%
Ford Fusion	173,600	-17.2%	Kia Forte	14,399	-12.1%
Chevrolet Malibu	144,542	-22.2%	Honda Accord	13,827	2.4%
Chevrolet Cruze	142,617	-22.8%	Nissan Sentra	12,593	-9.3%
Minivans					
Dodge Grand Caravan	151,927	21.4%	Dodge Grand Caravan	32,523	-31.3%
Chrysler Pacifica	118,322	0.0%	Toyota Sienna	15,117	-2.3%
Honda Odyssey	106,327	6.0%	Honda Odyssey	11,546	2.8%
Dodge Journey	94,096	5.2%	Chrysler Pacifica	5,999	-3.0%
Toyota Sienna	87,672	-21.4%	Dodge Journey	5,777	-58.0%
Ford Transit Connect	31,923	-7.4%	Kia Sedona	5,388	1.9%
Kia Sedona	17,928	-24.7%	Ford Transit Connect	3,014	13.7%
Mercedes Metris	8,391	10.7%	Mercedes Metris	1,575	-11.4%
SUVs/CUVs					
Toyota RAV4	427,170	4.8%	Toyota RAV4	55,385	8.8%
Nissan Rogue	412,110	2.1%	Honda CR-V	54,879	8.8%
Honda CR-V	379,013	0.3%	Ford Escape	43,857	-8.4%
Chevrolet Equinox	332,618	14.5%	Nissan Rogue	41,167	-5.2%
Ford Escape	272,228	-11.7%	Jeep Wrangler	24,615	42.3%
Ford Explorer	261,571	-3.5%	Jeep Cherokee	22,239	-6.2%
Toyota Highlander	244,511	13.3%	Chevrolet Equinox	21,338	-12.7%
Jeep Wrangler	240,032	26.0%	Ford Explorer	18,289	5.5%
Jeep Cherokee	239,437	40.9%	Toyota Highlander	14,641	-4.1%
Jeep Grand Cherokee	224,908	-6.6%	Subaru Forester	14,245	6.0%
Subaru Outback	178,854	-5.3%	Jeep Grand Cherokee	14,099	-16.5%
Subaru Forester	171,613	-3.4%	Subaru Outback	10,954	-4.7%
Light Trucks					
Ford F series	909,330	1.4%	Ford F series	145,694	-6.2%
Chevrolet Silverado	585,581	0.0%	Ram	84,854	-13.8%
Ram	536,980	7.2%	GMC Sierra	56,246	-9.1%
Toyota Tacoma	245,659	24.0%	Chevrolet Silverado	55,097	-6.7%
GMC Sierra	219,554	0.7%	Toyota Tacoma	13,878	11.4%
Chevrolet Colorado	134,842	19.3%	Toyota Tundra	11,738	24.3%
Toyota Tundra	118,258	1.7%	Chevrolet Colorado	9,326	15.7%
Nissan Frontier	76,646	7.1%	GMC Canyon	6,719	7.3%
Nissan Titan	50,459	-4.7%	Nissan Titan	5,445	-4.3%
GMC Canyon	33,492	4.3%	Nissan Frontier	4,134	-3.0%
Cargo/Delivery Vans					
Ford Transit	137,794	8.2%	Ford Transit	14,956	25.1%
Chevrolet Express	82,239	17.5%	GMC Savana	6,405	-1.1%
Ford E-Series	47,936	-10.1%	Mercedes Sprinter	4,963	5.7%
Ram ProMaster	46,600	15.1%	Chevrolet Express	4,705	-4.5%
Mercedes Sprinter	29,787	8.7%	Ford E-Series	4,244	19.9%
GMC Savana	19,684	-33.7%	Ram ProMaster	4,165	-3.6%
Nissan NV 200	18,628	0.1%	Nissan NV 200	1,700	-2.7%
Nissan NV	16,902	-5.4%	Nissan NV	827	10.0%
Ram ProMaster City	13,788	-11.5%	Ram ProMaster City	543	-48.7%
Top Nameplates (PC/LT/SUV)					
Ford	2,381,635	-3.3%	Ford	289,705	-3.6%
Toyota	2,128,357	0.0%	Toyota	231,646	3.2%
Chevrolet	2,065,883	-1.4%	Honda	195,379	-0.9%
Honda	1,445,894	-2.8%	Chevrolet	164,220	-4.0%
Nissan	1,344,597	-6.6%	Nissan	149,117	1.7%
Jeep	973,227	17.5%	Hyundai	129,280	-0.7%
Subaru	680,135	5.0%	GMC	93,981	-5.6%
Hyundai	667,633	0.4%	Ram	89,562	-13.4%
Ram	597,388	7.3%	Mazda	73,869	-0.3%
Kia	589,673	0.0%	Kia	73,009	-4.6%
Others	4,470,059	2.4%	Others	513,738	-10.8%
TOTAL U.S.	17,344,481	0.6%	TOTAL Canada	2,003,506	-1.9%

U.S. sales by country of origin

	2017 Units
U.S./Canada/Mexico	13,203,322
Japan	2,040,262
Europe	1,229,678
South Korea	752,273
Others	108,946
Imports (Subtotal)	4,131,159
TOTAL	17,344,481

Sources: Automotive News; Automotive News Canada

Market Data Book

Tire Plant Codes

Continued from Page 26

01A Tianjin Heng Tai Gallop Technology Co. Ltd.....Tianjin, China	03H P.T. Hung A Tire.... Bekaski, Indonesia	1V5 Shandong Guopeng Rubber Co. Ltd.....Weifang City, Shandong, China	Co. Ltd.....Panyu, China	6U, 16U MichelinClermont-Ferrand, France
01B Giti Tire Manufacturing (USA) Ltd.Richburg, S.C.	03J Agarwal Rubber Ltd.Hyderabad, India	1W, 11W Goodyear....Aurangabad, India	4J, 14J Sverdllovsk TireSverdllovsk, Russia	6W, 16W Hwa Fong RubberJiang Su, China
01C ATC Tires (Yokohama)Dahej/Gujarat, India Factory	03K Shandong Giki Tyre Co. Ltd Qingdao, Shandong, China	1X, 11X Sichuan Lion Tyre Co. Ltd.Jianyang/Sichuan, China	4K, 14K Tianjin Tyre.....Tianjin, China	6X, 16X Guangzhou BolexGuangdon, China
01D Jiangsu Hua'an Tyre Technology Co. Ltd.....Shuyang/Jiangsu, China	03L Industrias Michelin S.A. de C.V. Leon, Mexico	1Y, 11Y Shandong Huatai Rubber Co. Ltd.....Laiwu/Shandong, China	4L, 14L Carlstar GroupBu Ji Town, China	6Y, 16Y ContinentalPuchov, Slovak Republic
01E Tongli Tyre Co. Ltd.Jining/Shandong, China	03M Qingdao Puregain Tyre Co. Qingdao, Shandong, China	1YU JSC Nizhnekamskshina Nizhnekamsk, Russia	4M, 14M Michelin.....Greenville, S.C.	7A, 17A Kings Tire....Bangkok, Thailand
01F Ningxia Shenzhou Tyre Co. Ltd.Shizuishan/Ningxia, China	03N Ceat Ltd.Kancheepuram, Tamil Nadu, India	1Z Otani Tire Co. Ltd.Nakornpathom, Thailand	4N, 14N Hwa Fong RubberChangshu, Jiangsu, China	7B, 17B Shandong Longyue Rubber Co. Ltd.....Heze City, China
01H TrelleborgSpartanburg, S.C.	03P Shandong Runtong Rubber Co. Ltd..... Rizhao, Shandong, China	2A, 12A Jiu H Shuenn Enterprise Co. Ltd.....Taichung, Taiwan	4P, 14P P.T. Suryaraya Rubberindo Industries.....Bogor, Indonesia	7C, 17C Laiwu Sunshine Tyre Co. Ltd.....Laiwu, Shandong, China
01J Maxxis Rubber (Cheng Shin) Ahmedabad/Gujarat, India	03R Qingdao Summit Rubber Industry Co. Ltd.... Qingdao, Shandong, China	2B, 12B Deestone Ltd.Samutsakorn, Thailand	4Q, 24Q FUNSA....Montevideo, Uruguay	7D, 17D Hangzhou Zhongce Rubber Co. Ltd....Hangzhou Zhongce, China
01K Weifang Huantai Rubber Co. Ltd.Changyi/Shandong, China	0A, 10A Siam RubberSamutsakhon, Thailand	2C, 12C BridgestoneWarren County, Tenn.	4R, 14R Rumagama (Trelleborg)Belgrade, Serbia	7E, 17E Lima Caucho.....Lima, Peru
01L Shandong Jiluer Tyre Co. Ltd.Tengzhou/Shandong, China	0B, 10B Bridgestone.....Wilson, N.C.	2D, 12D Toyo TireKamunting/Perak, Malaysia	4S, 24S Belshina....Bobruisk, Belarus	7F, 17F Cheng Shin RubberXiamen Sez, China
01M DNA Specialty Inc.Compton, Calif.	0C, 10C MichelinLaem Chabang, Thailand	2E, 12E Federal Tire....Nanchang, China	4T, 14T Kumho.....Nanjing, China	7G, 27G Bridgestone.....Poznan, Poland
01N Zhongce Rubber (Fuyang) Co. Ltd.....Fuyang/Zhejiang, China	0D, 10D Guizhou Tyre FactoryGuizhou, China	2G, 22G PT Mega RubberSemarang, Indonesia	4U, 14U YokohamaClark Field, Philippines	7H, 17H Shenyang Sunshine Tyre Co. Ltd.....Shenyang, China
01P Weihai Huayang Rubber Technology.....Weihai/Shandong, China	0E, 10E BridgestonePuente San Miguel, Spain	2H, 12H Dewan Tyres Ltd.Meerat, India	4V, 14V Chonche Auto Double Happiness Tyre Co. Ltd.Taiyuan City, Shanxi, China	7I, 27I P.T. Hung-A....West Java, Indonesia
01R Federal TireGuanyin/Taoyuan, Taiwan	0F, 10F Innova Rubber (Pinghu) Co.Pinghu City/Zhejiang, China	2I, 12I Qingdao Glen Group Co.Yangjiaqun/Qingdao, China	4W, 14W BridgestoneMadhya-Pradesh, India	7J, 17J Northwest General RubberShaanxi, China
01T Rizhao Younai Tires Co. Ltd. Ju County/Shandong, China	0H, 10H Triangle Group (Shandong Tyre Factory).....Weihai, China	2J, 12J Double Coin Heavy-Duty Tire Co.Ta Chung Hua, China	4X, 14X Super East Industrial Co. Ltd.....Chang-Hwa, Taiwan	7K, 17K Friendship RubberSelangor, Malaysia
01U Weifang Goldshield Tire Co. Ltd.Weifang/Shandong, China	0J, 10J Beijing Tyre FactorySheng Men Wai, Beijing, China	2K, 12K Liaoning Long MarchLiaoning, China	4Y, 14Y Shandong Chengshan Tire Co. Ltd.....Rong Cheng, China	7L, 17L Goodyear.....Dalian, China
01V Qingdao Century Fung Tire Co. Ltd..... Qingdao/Shandong, China	0K, 10K Guangzhou Pearl River Rubber Tyre Ltd.....Guilin, Guangxi, China	2L, 12L Quindao Tongtai Rubber Factory.....Quingdao City, China	5A, 15A Vee RubberBangkok, Thailand	7M, 17M Haohua South (Guilin) Rubber Ltd.....Guilin, Guangxi, China
01W Qingdao Rili Tyre Co. Ltd. Pingdu/Shandong, China	0L, 10L MRF.....Madras, India	2M, 12M Bridgestone.....Bloomington, Ill.	5B, 15B Tianjin Century Rubber Co. Ltd.Tianjin, China	7N, 17N Weifang Yuelong Rubber Co. Ltd.....Shouguang, Shandong, China
01X Shandong Yuanfeng Rubber Technology Co. Ltd. Weifang/Shandong, China	0M, 10M TRENCO.....Alexandria, Egypt	2P, 12P YokohamaBinh Duong, Vietnam	5C, 15C Bridgestone.....Bilbao, Spain	7O, 17O MichelinClermont-Ferrand, France
01Y Qingdao Wantai Rubber Products Co. Ltd.Qingdao/Shandong, China	0N, 10N Zhejiang Huntington Forlong Rubber Co. Ltd.Fuyang/Zhejiang, China	2Q, 22Q Kenda RubberGuangdong, China	5D, 15D BridgestoneWarren County, Tenn.	7P, 17P Dongying Weide Tyre Co. Ltd.....Dongying, Shandong, China
02A Jiangsu Gunade Tyre Co. Ltd.Jiangsu, China	0O, 10O Michelin.....Sao Paulo, Brazil	2R, 12R BridgestoneKarawang, Indonesia	5E, 15E Michelin.....Le Puy, France	7Q, 17Q SumitomoCikampek, Indonesia
02B Suzhou Chenxin Tire Co. Ltd.Wujiang, China	0P, 10P Cheng Shing RubberTianjian, China	2S, 12S Wuxi Far East Tyre Co. Ltd.Wuxi, China	5F, 15F JK Ternel (JK Tyre)Mexico City, Mexico	7R, 17R Kumho....Nanjing, Jiangsu, China
02C Omexey Rubber Industrial Corp.Binh Duong, Vietnam	0R, 10R Cheng Shing RubberTianjian, China	2T, 12T Wuxi Far East Tyre Co. Ltd.Wuxi, China	5G, 25G YokohamaHo Chi Minh City, Vietnam	7S, 17S Michelin.....Shenyang, China
02D Shanghai Baosteel Wheels Co. Ltd. Shanghai, China	0T, 10T SumitomoChangshu, Jiangsu, China	2U, 12U Cheng Shin RubberJiangsu, China	5H, 15H Dee RubberSamutsakorn, Thailand	7T, 17T Siamese TyreMinburi, Thailand
02E Shandong Dreamaker Tyre Co. Ltd..... Shandong, China	0U, 10U Shandong Linglong Rubber Co. Ltd....Zhaoyan/Shandong, China	2V, 12V Triangle (Weihai) Huasheng Tyre Co. Ltd.....Wehai, Shandong, China	5J, 15J Shanghai Da Fu Rubber PlantDa Fu, China	7X, 17X Bridgestone.....Graniteville, S.C.
02F Toyomoto Corp. Beijing, China	0V, 10V Yokohama ...Hangzhou, China	2W, 12W Yantai Tyre FactoryShandong, China	5K, 15K P.T. MultistradaBekasi, Indonesia	7Y, 17Y Kenda RubberKunshan/Jiangsu, China
02H Golden Horse Rubber Sdn. Bhd. Selangor, Malaysia	0W, 10W Voronezh O.p.c.o.Voronezh, Russia	2X, 12X HankookDunaujvaros, Hungary	5L, 15L Guilin TyreGuilin, China	7Z, 27Z Rong Cheng Rongda Rubber Co. Ltd.....Shandong, China
02J Huayi Group (Thailand) Co. Ltd. Rayong, Thailand	0X, 10X Achievor Tire....Qingdao, China	2Y, 12Y Yunnan Tire.....Yunnan, China	5M, 15M Hankook...Kumsan, South Korea	8A, 18A Zapater DiazBuenos Aires, Argentina
02K Keich International Tyre Co. Ltd. Bangkok, Thailand	0Y, 10Y China Qingdao No. 6 Group Co. Ltd.....Qingdao/Shandong, China	3A, 13A GITI Tire (Hua Lin) Co. Ltd.....Heilongjiang, China	5N, 15N Cheng Shin RubberDong Nai, Vietnam	8B, 18B Bridgestone...Des Moines, Iowa
02L Shandong Kupo Tyre Co. Ltd. Linyi/Shandong, China	1A, 11A Union Rubber Industries Co. Ltd.....Taipei, Taiwan	3B, 13B Tianjin United Tire & Rubber Intl. Co. Ltd.....Tianjin, China	5P, 15P Balkrishna Industries Ltd.Rajasthan, India	8C, 18C Bridgestone...Bethune, France
02M Mark Ma Tire Co. Ltd. Miaoli City, Taiwan	1AG Hulera Ternel (JK Tyre)Cuidad de Mexico, Mexico	3C, 13C Continental.....Mt. Vernon, Ill.	5Q, 25Q Rongcheng Guotai Tyre Co. Ltd.....Rongcheng/Shandong, China	8D, 18D Hangzhou General Rubber Factory.....Jiande, Zhejiang, China
02N MRL Tyres Ltd. Noida/Uttar Pradesh, India	1B, 11B Pirelli.....Valencia, Venezuela	3D, 13D Petroshina Joint Stock Co.St. Petersburg, Russia	5R, 15R Falcon Tyres Ltd.Mysore, India	8E, 18E Nexen....Yangsang, South Korea
02P Continental.....Clinton, Miss.	1BT Shandong Cocrea Tyres Co. Ltd. Linyi City/Shandong, China	3E, 13E Qingdao No. 2 Rubber FactoryQingdao, China	5S, 25S Lanyu Aircraft Tire DevelopmentGuilin/Guangxi, China	8F, 18F Apollo Tyres...Vadodara, India
02R Kenda RubberSerang/Banten, Indonesia	1D, 11D BridgestoneShimonoseki, Japan	3F, 13F Trelleborg Wheel...Xingtai, China	5T, 15T BridgestoneSanto Andre, Brazil	8G, 28G Haikou Haihua Tyre Co. Ltd.Haikou/Hainan, China
02T Kenda Rubber... Dong Nai, Vietnam	1E, 11E Liaoning Tyre FactoryChaoyang, China	3H, 13H Birla Tyres....Balasore, India	5U, 15U Jianguo Feichi...Jiangsu, China	8H, 18H Ceat Ltd.....Nasik, India
02U Shandong Yiwei Rubber Co. Ltd.Dongying/Shandong, China	1E2 Bridgestone.....Santo Andre, Brazil	3J, 13J Rhoden (M) Sdn. Bhd.Port Klang, Malaysia	5V, 15V Michelin.....Lille, France	8J, 18J Jiangsu Hanta Tire (Hankook)Jiangsu, China
02V Qingdao Visastone Industry & Trade Co. Ltd..... Qingdao/Shandong, China	1G, 21G Hankook....Jiaxing/Zhejiang, China	3L, 13L Michelin.....Khae, Thailand	5W, 15W Giti Tire (Fujian) Co. Ltd.Fujian, China	8K, 18K Chongqing Tyre Chief Factory (Giti Tire).....Chongqing, China
02W Shandong Mirage Tyres Co. Ltd. Dongying/Shandong, China	1H, 11H Continental.....Cuenca, Ecuador	3M, 13M Bridgestone.....Bloomington, Ill.	5X, 15X Aeolus Tyre Co. Ltd.Henan, China	8L, 18L Continental...Timisoara, Romania
02X Sao Vang Rubber J.S.C. Hanoi, Vietnam	1H2 KumhoGwangsan-gu, South Korea	3N, 13N Chongqing Jindun Rubber Products Co. Ltd.....Chongqing, China	5Y, 15Y Tianjin Wanda...Tianjin, China	6A, 16A Roadstone Tyre & Rubber Co. Ltd.....Bangkok, Thailand
02Y Qingdao Ailite Rubber Co. Ltd.Qingdao/Shandong, China	1J, 11J Xiamen Petrel Rubber Co. Ltd.Xiamen, Fujian, China	3P, 13P Hwa FongSamutprakarn, Thailand	6B, 16B Continental...Mount Vernon, Ill.	6B, 16B Continental...Mount Vernon, Ill.
03A CEAT Ltd.Nagpur, Maharashtra, India	1K, 11K Doublestar Dong Feng Tyre Co. Ltd...Shi Yan Clty, Hubei, China	3Q, 23Q Continental....Hannover, Germany	6C, 16C Bridgestone....Burgos, Spain	6D, 16D Henan Tyre PlantJiaozuo, China
03C Directorate for Construction of Rubber Plants L.L.C.Angren, Tashkent, Uzbekistan	1L, 11L ContinentalPort Elizabeth, South Africa	3R, 13R Michelin.....Itatiaia, Brazil	6E, 16E Henan Tyre PlantJiaozuo, China	6E, 16E Double Happiness Tyre Ind. Corp. Ltd....TaiYuan Shen Xi, China
03D Jiangsu Runchang Rubber Technology Co. Ltd.....Suqian, Jiangsu, China	1M, 11M Shandong Taishan Tye FactoryFeicheng City/Shandong, China	3T, 13T PT Mega Safe Tyre IndustrySalatiga, Indonesia	6F, 26F Continental...Timisoara, Romania	6H, 16H Srichakra Tyres Ltd.Tamilnadu, India
03E Vee Rubber India Pvt. Ltd. Ahmedabad, Gujarat, India	1N, 11N Tianjin Kings Glory Tyre Co. Ltd.....Yang Liu Qing, Tianjin, China	3U, 13U Specialty Tire.....Unicoi, Tenn.	6I, 26I Michelin...Nyiregyhaza, Hungary	6J, 16J Trelleborg..Zlin, Czech Republic
03F Roadboss Rubber Technology Co. Ltd..... Dongying, Shandong, China	1P, 11P Shandong Haohua Tyre Co. Ltd.Shouguang, China	3V, 13V Balkrishna Industries Ltd.Waluj, India	6K, 16K Ceat Ltd....Aurangabad, India	6L, 16L Vee TyreSamutsakorn, Thailand
	1R, 11R Chaoyang Long March Tyre Co. Ltd....Chaoyang, Liaoning, China	3W, 13W Shandong Qi Xia Tire FactoryShandong, China	6M, 16M Mewat Tire & Rubber (P) Ltd.Kirov, Russia	6Q, 26Q Shandong Weihai Rubber Plant...Weihai City/Shandong, China
	1S, 20S Thai Sin Rubber Industry Ltd.Samutsakorn, Thailand	3X, 13X Tianjin Tyre.....Tianjin, China	6R, 16R Qingdao Henhua Industrial Group Corp.Qingdao, Shandong, China	6T, 16T Bridgestone.....Sao Paulo, Brazil
	1T, 11T BridgestoneHai Phong City, Vietnam	3Y, 13Y Bridgestone.....Poznan, Poland		
	1TM, TM Bridgestone..Huizhou, China	4A, 14A Vee Rubber Co. Ltd.Samutsakom, Thailand		
	1TN Weifang Luyi Rubber Products Co. Ltd....Changyi City/Shandong, China	4B, 14B Goodyear.....Napanea, Ontario		
	1U, 11U Bridgestone.....Tianjin, China	4C, 14C BridgestoneWarren County, Tenn.		
	1V, 11V BridgestoneNong Khae/Saraburi, Thailand	4D, 14D BridgestoneWarren County, Tenn.		
		4E, 14E Anhui Kaiyuan Tire...Hefei, China		
		4F, 14F JK Ternel (JK Tyre)Tultitlan, Mexico		
		4G, 24G Henan Tyre.....Henan, China		
		4H, 14H South China Tire & Rubber		

Market Data Book

Tire Market Facts

Tire shipments, production, imports all up in 2018

Continued from page 1

due to the ramping up of production by the U.S. industry's newest domestic manufacturers — Giti Tire Group in Richburg, S.C.; Hankook Tire Co. Inc. in Clarksville, Tenn.; and Kumho Tire Co. Ltd. in Macon, Ga.

Together these three plants represent nearly 20 million units of new annual manufacturing capacity. In addition, Continental Tire the Americas, Nokian Tyres P.L.C. and Triangle Group all have plants under construction in the U.S., which will add several more million units of new annual capacity by 2020 and beyond.

OE car tire shipments rebounded last year after a down year in 2017, rising 4.2-percent to 47.1 million units in a year when North American light vehicle production slipped 2.5 percent to just shy of 17 million cars, SUVs, vans and light trucks.

While the consumer tire segment's growth was notable, it was the commercial tire segment that showed considerable strength last year, with replacement market medium truck/bus tire shipments rising 9.2 percent, to 21.3 million units, and OE shipments jumping 21.9 percent to 6.5 million units.

Again, the rising demand was met by increased domestic production — up 2.2 percent to 14.4 million units — and imports — up an estimated 13 percent to roughly 16.5 million units, according to USTMA and Department of Commerce data.

The commercial segment's bullish year is reflected in a strong year by the trucking industry. According to the American Trucking Associations (ATA), activity by the trucking industry was up more than 6.5 percent throughout 2018, easily outpacing 2017 and the sector's best year-over-year performance in 20 years.

ATA Chief Economist Bob Costello called 2018 a "banner year" for trucking, even though activity slowed measurably toward year-end.

In the light truck tire arena, both replacement and OE shipments rose last year versus 2017, but both production and imports declined as well, according to the USTMA and Commerce data.

Replacement tire market demand in Canada rose in all three major categories, according to Tire and Rubber Association of Canada (TRAC) data — passenger tires up 4.2 percent, light truck tires up 3.6 percent and medium truck/bus tires up 1.5 percent.

Imports of passenger tires to the U.S. from China — which have been subject to elevated import duties since 2015 — plummeted nearly 25 percent from 2017 to about roughly 8 million units, falling behind Thailand, South Korea, Indonesia, Mexico, Canada and Vietnam among foreign sources of car tires.

2018 marked the fourth straight double-digit decline in imports from China.

On the sales side, most tire companies' revenue showed some improvement over 2016, both in unit volume and dollar revenue.

Despite the increased demand for tires indicated by the USTMA and TRAC data, the major tire companies' preliminary results don't seem to reflect the apparent boom year.

Bridgestone Americas retained the

top spot in North America with estimated tire-related sales of \$9.75 billion, ahead of Michelin North America Inc.'s \$9.1 billion and Goodyear's \$6.35 billion. Goodyear, for example, noted that on a unit sales basis in its Americas business unit, 2018 was unchanged from 2017. Cooper Tire & Rubber Co. registered a sales decline through nine months.

On the retail side of the ledger, Discount Tire/America's Tire and Bridgestone Retail Operations ranked one and two again, with \$4.84 billion and \$4.5 billion in fiscal 2017 sales, respectively, according to *Tire Business* research.

Discount Tire operated 1,020 stores at year-end 2018, compared with 2,222 Bridgestone Retail Operations stores, doing business as Firestone Complete Auto Care, Tires Plus and Wheel Works.

Also worth noting: the USTMA's shipment data showed the share of the car tire aftermarket controlled by "local dealerships" — those with fewer than 10 outlets in a single regional distribution area — rebounded last year, gaining a full percentage point in the passenger tire arena to 14 percent and adding two points in the light truck area to 23 percent.

Other nuggets gleaned from the Market Data Book include:

- Demand for high-performance tires in the U.S. continues to increase, especially on the replacement side,

U.S. tire market — overview

(millions of units)
2016 2017 2018*

Passenger

Replacement shipments	208.6	209.3	216.7
Imports	146.5	144.6	148.8
Production	123.7	121.3	126.3
OE shipments	49.3	45.2	47.1
Exports	25.6	24.5	24.9

Light truck

Replacement shipments	31.9	31.2	31.6
Imports	27.9	26.4	25.1
Production	28.3	26.1	25.3
OE shipments	4.9	5.4	5.6
Exports	5.8	5.8	5.6

Medium truck & bus

Replacement shipments	18.6	19.5	21.3
Imports	14.0	14.3	16.5
Production	13.7	14.0	14.4
OE shipments	5.0	5.4	6.5
Exports	2.6	2.5	2.9

Sources: U.S. Tire Manufacturers Association; U.S. Department of Commerce
* preliminary data; subject to change

where shipments of tires H-rated and higher now represent 45.5 percent of aftermarket shipments, up from 40 percent in 2016.

The OE share jumped nearly two points to 57.4 percent, the USTMA data revealed, led by shipments of Z-rated tires to U.S. and Canadian car factories, which jumped 20 percent versus 2017.

Aftermarket shipments of H-, V- and Z-rated tires rose 7.3 percent to 98.7 million units. The shift at OE also is reflected in the breakdown of OE tire sizes, where the 10 most popular sizes now are all 17-, 18-, 19- or

20-inch rim diameter sizes. Together they account for nearly 30 percent of all OE shipments.

- Goodyear remained the No. 1 supplier of OE consumer tires last year, outfitting an estimated 25.5 percent of the 17 million cars, SUVs/ CUVs and light trucks built in North America in 2018 with its Goodyear and Dunlop brands.

Michelin North America was No. 2 with its Michelin and BFGoodrich brands, ahead of Bridgestone Americas (Bridgestone and Firestone brands) and Continental Tire the Americas L.L.C. (Continental and General brands).

Increasingly the auto OEMs are spec'ing brands other than the traditional major brands, a trend reflected in the list of tire companies supplying the car makers, which now includes brands such as Falken, Hankook, Kumho and Nexen.

Also making strides with OE manufacturers is Sumitomo Rubber North America, which now has responsibility for supplying both Dunlop and Falken-brand OE tires to the U.S. assembly plants of the Japanese car makers — Honda North America Inc., Mazda (North America) Inc., Nissan North America Inc., Subaru of America and Toyota Motor Mfg.

- South Carolina remains the No. 1 tire-producing state with estimated daily tire production capacity of roughly 110,400 units. Oklahoma

holds the No. 2 spot at 88,000 units, ahead of North Carolina at 74,000. North Carolina, however, is destined to grow with the commitment by China's Triangle Group to build a pair of plants in the Tar Heel state.

- U.S. shipments of winter/traction tires slid for a third straight year — by about 5 percent — and accounted for just 2 percent of all replacement car tire shipments. By contrast, winter tires represent more than 35 percent of aftermarket car tire shipments in Canada.

It should be noted, though, that the USTMA revised the way it classifies winter tires, putting a portion of all-season tires that carry the industry's 3-Peak Mountain Symbol that previously were considered winter/traction tires into the all-season tread group.

- Vehicle registrations in the U.S. increased 2.7 percent in 2017 (the most recent year for which data are available) to 17.6 million vehicles, including 11 million light trucks and 6.1 million cars.

Hourly wages for auto technicians rose again in 2017 for the fourth straight year, to \$17.81 per hour, according to U.S. Bureau of Labor Statistics data.

The Market Data Book also contains benchmarking information on the automotive service sector (See page 30) and summaries of *Tire Business'* retail, commercial and retread rankings from 2018.

Recognized passenger radial SKUs

Rim Diameter

Year	12"	13"	14"	15"	16"	17"	18"	19"	20"	21"	22"	23"	24"	26"	Total
1992	3	21	33	40	14	6	0	0	0	0	0	0	0	0	117
1994	3	21	33	43	21	12	0	0	0	0	0	0	0	0	133
1996	4	22	34	46	26	17	5	0	1	0	0	0	0	0	155
1998	2	21	35	51	33	29	14	1	3	0	0	0	0	0	189
2000	2	21	37	52	41	36	19	1	4	0	0	0	0	0	213
2002	2	21	37	53	46	45	35	4	9	0	0	0	0	0	252
2004	1	14	25	47	47	51	44	7	11	1	1	1	10	0	249
2006	1	13	25	47	50	52	50	12	14	1	3	1	0	0	269
2008	1	13	25	50	54	54	57	20	22	2	6	2	6	0	312
2010	1	13	25	53	56	57	59	22	25	2	7	2	6	0	328
2012	1	13	25	54	56	58	63	23	26	2	7	2	6	1	337
2015	1	13	26	56	57	58	65	25	29	2	7	2	6	1	348
2018	1	13	26	56	58	59	67	27	32	2	7	2	6	1	357

Source: Tire & Rim Association yearbook

As evidence of tire industry SKU count and complexity increase over time since 2008, the number of passenger radial sizes recognized by the Tire & Rim Association has increased to 357 from 312, up 45 sizes, a 14% increase.

Thirty-four of the new sizes (76%) were 17-inch or larger rim diameters.

This count does not include additional SKUs resulting from different speed ratings, load ratings, tire features, tire types, multiple brands, etc.

Aspect Ratio

Year	85	80	75	70	65	60	55	50	45	40	35	30	25	Total
1992	0	7	14	24	12	28	7	19	1	2	3	0	0	117
1994	0	7	14	26	14	30	10	19	6	4	3	0	0	133
1996	0	7	15	33	14	31	11	24	7	8	4	1	0	155
1998	0	6	16	33	21	36	17	30	10	12	7	1	0	189
2000	0	6	18	35	27	40	18	34	12	14	8	1	0	213
2002	0	6	19	37	32	45	24	37	17	20	14	1	0	252
2004	0	5	20	34	30	38	24	35	22	23	14	4	0	249
2006	0	5	20	36	31	41	25	38	27	26	15	5	0	269
2008	0	5	20	37	33	42	31	41	35	31	22	11	4	312
2010	0	5	20	39	35	43	32	43	37	33	26	11	4	328
2012	1	5	20	39	35	44	33	43	37	35	28	12	5	337
2015	1	5	20	40	35	46	34	45	37	35	30	15	5	348
2018	1	6	20	40	35	46	35	46	39	36	32	15	6	357

Source: Tire & Rim Association yearbook

Market Data Book

Auto Service Facts

Automotive aftermarket employment trends

(Thousands of jobs)

	2008	2009	2010	2011	2012	2013	2014	2015 [®]	2016 [®]	2017	2008-17*
Automobile dealers											
Employees	1,176.7	1,018.2	1,011.5	1,056.9	1,095.5	1,136.5	1,184.9	1,238.5	1,279.0	1,296.5	1.1%
Avg. hourly wage (non-supervisory)	\$17.13	\$17.67	\$18.22	\$18.61	\$19.10	\$19.86	\$20.30	\$20.34	\$20.33	\$20.60	2.1%
Auto parts & accessories stores											
Employees	325.2	320.3	323.3	336.2	337.3	344.1	355.8	365.0	367.9	371.1	1.5%
Avg. hourly wage (non-supervisory)	\$13.19	\$13.64	\$14.03	\$14.44	\$14.90	\$15.01	\$15.32	\$16.30	\$16.36	\$16.01	2.2%
Tire dealers											
Employees	166.9	163.0	18.3	170.6	174.5	176.9	178.6	180.0	182.3	185.5	1.2%
Avg. hourly wage (non-supervisory)	\$14.51	\$14.80	\$15.48	\$15.90	\$15.54	\$15.44	\$15.34	\$15.09	\$15.41	\$15.60	0.8%
Auto repair / maintenance											
Employees	856.3	805.8	801.1	819.6	832.1	847.5	868.5	896.2	913.4	923.0	0.8%
Avg. hourly wage (non-supervisory)	\$15.23	\$15.27	\$15.55	\$16.03	\$16.00	\$16.18	\$16.95	\$17.41	\$17.75	\$18.72	2.3%

Source: Bureau of Labor Statistics; Auto Care Association [®]: historical data have been revised * Compounded annual growth rate

Size of U.S. motor vehicle aftermarket auto care industry

(Billions of consumer dollars)

Year	Automotive	Medium / Heavy-Duty	Total Auto Care Industry	% Change Year-to-Year
2021	\$326.7	\$106.6	\$433.3	3.2%
2020 [®]	\$316.6	\$103.1	\$419.7	3.4%
2019 [®]	\$306.2	\$99.7	\$405.9	3.4%
2018 [®]	\$296.0	\$96.4	\$392.4	3.5%
2017	\$286.9	\$94.2	\$381.1	3.5%
2016	\$265.7	\$87.7	\$353.4	4.1%
2015	\$248.7	\$81.5	\$328.2	3.5%
2014	\$238.4	\$78.8	\$317.2	3.1%
2013	\$231.2	\$76.5	\$307.7	3.5%
2012	\$223.4	\$73.9	\$297.3	4.7%
2011	\$213.3	\$70.6	\$283.9	3.7%
CAGR 2017-21	3.4%	3.4%	3.4%	

Source: Auto Care Association; Automotive Aftermarket Suppliers Association, Bureau of Labor Statistics [®] — revised from earlier reports

Technicians' wages

(Dollars per hour)

Year	(\$ per hour)
2017	\$17.81
2016	\$17.27
2015	\$16.86
2014	\$16.62
2013	\$16.13
2012	\$16.27
2011	\$16.16
2010	\$16.13
2009	\$15.99
2008	\$15.70
2007	\$15.37
2006	\$14.70
2005	\$14.09
2004	\$13.68
2003	\$13.51
2002	\$13.31

Source: U.S. Bureau of Labor Statistics

Automotive aftermarket sales to end users by distribution channel

(Millions of consumer dollars)

Outlet Type	2017 [®]	2018 [®]	2019 [®]	2020*
New car dealers	\$79,985	\$82,859	\$85,727	\$88,653
Used car dealers	\$2,114	\$2,170	\$2,230	\$2,290
General repair shops	\$41,556	\$43,063	\$44,691	\$46,452
Other auto repair ¹	\$4,220	\$4,372	\$4,531	\$4,702
Tire dealers	\$20,558	\$21,236	\$21,680	\$22,130
Warehouse clubs, etc.	\$19,659	\$20,332	\$21,023	\$21,686
Oil change/lubrication shops	\$6,050	\$6,281	\$6,539	\$6,823
Auto parts/accessories ²	\$32,242	\$33,171	\$34,037	\$34,973
Gas stations	\$9,192	\$9,471	\$9,744	\$10,025
Transmission repair	\$2,331	\$2,411	\$2,503	\$2,600
Medium-/heavy-duty repair	\$93,300	\$96,400	\$99,700	\$103,100

Source: Auto Care Association; Automotive Aftermarket Suppliers Association

[®] — revised from earlier reports * - estimated¹ — includes mechanical, electrical, exhaust and miscellaneous repair and maintenance² — represents sales to the general public; excludes wholesale revenues

Canadian automotive aftermarket — industry service channel outlets

Outlet Type	2009	2010	2011	2012	2013	2014	2015	2016
Motor vehicle dealers	22,561	37,060	22,570	22,722	23,592	22,762	23,050	23,556
Auto parts / accessories retailers	4,347	6,094	4,408	4,454	4,756	4,645	4,656	4,893
Parts / accessories wholesalers	3,278	4,409	3,046	3,036	3,062	2,944	2,892	2,925
Gasoline service stations	10,370	10,400	10,264	10,111	10,115	9,814	9,582	9,541

Source: DesRosiers Automotive Consultants Inc. courtesy of Auto Care Association

U.S. motor vehicle population

(vehicles in operation, in thousands)

	2015	2016	2017	2018
Cars: domestic	50,501	49,368	48,021	45,536
Cars: import	70,440	72,616	74,425	74,113
Light trucks: domestic	96,400	98,351	100,578	101,783
Light trucks: import	40,530	43,740	47,419	50,737
Medium/heavy trucks: Class 4-6	2,704	2,903	2,973	3,023
Medium/heavy trucks: Class 7-8	4,652	5,071	5,191	5,220

Sources: IHS Markit / Auto Care Association

U.S. automotive aftermarket — industry service channel outlets

CAGR

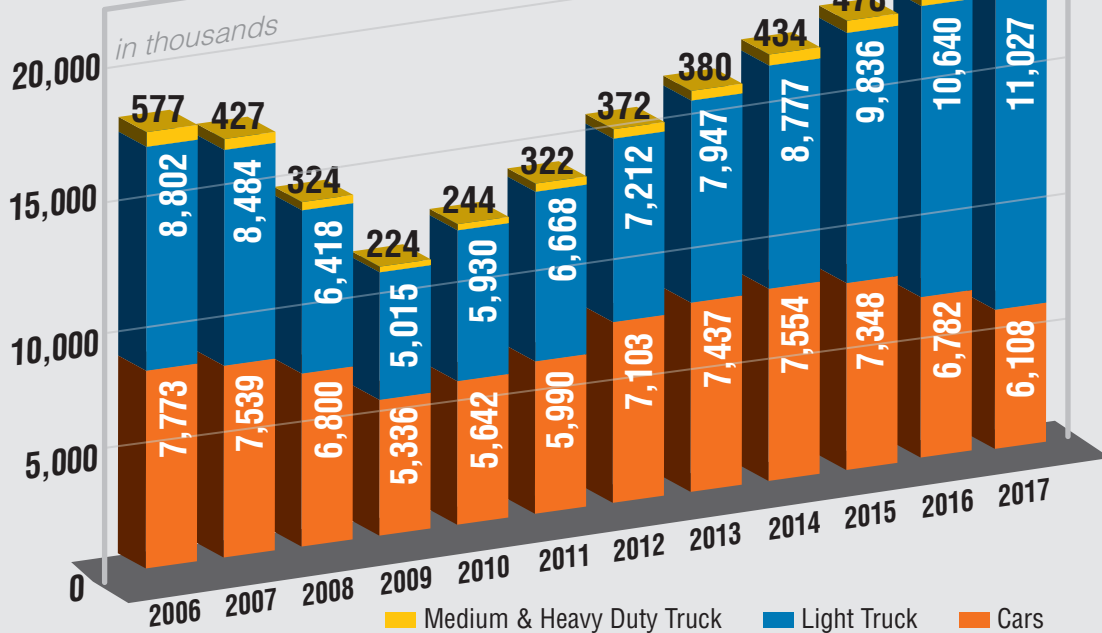
Outlet Type	2009	2010	2011	2012	2013	2014	2015	2016 [®]	2017*	2009-17
Motor vehicle dealers ¹	20,010	18,460	17,700	17,540	17,635	16,396	16,545	16,708	16,812	-2.2%
General repair garages ²	75,637	76,108	76,731	77,561	78,354	79,240	79,500	80,066	80,240	0.7%
Tire dealers	18,547	18,675	18,980	19,470	19,759	19,931	19,818	19,863	20,123	1.0%
Specialty repair shops ²	9,149	8,663	8,415	8,101	7,785	7,534	7,322	7,001	6,760	-3.7%
Gasoline stations ²	104,400	103,768	104,011	104,837	104,855	105,688	104,961	104,887	105,482	0.1%
Oil change / lubrication shops ²	7,501	7,518	7,490	7,427	7,430	7,368	7,354	7,449	7,367	-0.2%
Independent body shops	35,193	34,764	34,358	34,437	34,344	34,381	34,510	34,654	34,629	-0.2%
Total number of outlets	270,437	267,956	267,685	269,373	270,162	269,538	270,010	270,628	271,304	-0.2%

Source: Auto Care Association Digital Factbook 1 — NADA Industry Analysis Division 2 — Bureau of Labor Statistics [®] — revised from previous reports * preliminary

Market Data Book

Auto Service Facts

Annual U.S. motor vehicle registrations 2006-2017

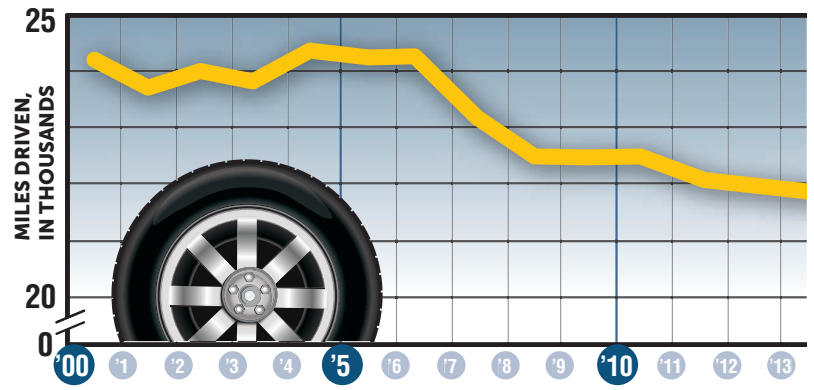


Source: ACA 2018 Digital Factbook/IHS Automotive

TIRE BUSINESS graphics by Michael McCrady

Racking up the miles

Miles driven per U.S. household



Source: University of Michigan study, using data from U.S. Census Bureau and Federal Highway.

U.S. tire imports

(millions of units)

	2014	2015	2016	2017®	2018*
Passenger	148.9	149.5	146.5	147.5	148.8
Avg. \$ value	\$51.55	\$51.03	\$49.12	\$49.52	\$51.35
Light truck	25.9	24.3	27.9	26.7	25.1
Avg. \$ value	\$75.61	\$72.37	\$68.91	\$69.23	\$72.24
Medium/wide-base truck	13.2	14.4	13.9	14.6	16.5
Avg. \$ value	\$172.16	\$161.36	\$141.87	\$152.98	\$156.73
Agricultural/ implement	2.1	2.2	1.9	1.8	1.8
Avg. \$ value	\$173.31	\$132.03	\$139.38	\$118.07	\$186.39
Construction/ industrial	2.8	2.6	N.A.	2.9	1.6
Avg. \$ value	\$173.32	\$254.94	—	\$421.22	\$341.45
ST trailer	12.5	17.9	16.2	29.9	28.4
Avg. \$ value	\$20.21	\$15.18	\$12.65	\$31.10	\$25.20

Sources: U.S. Commerce Department *estimated ®=revised

Leading U.S. wholesalers

Company / headquarters	Wholesale sales* (\$ millions)	No. of distribution centers
NATIONALLY ACTIVE		
American Tire Distributors Inc.¹ Charlotte, N.C. (www.atd-us.com)	5,200.0	130
NTW - National Tire Wholesale² Palm Beach Gardens, Fla (www.ntw.com)	*2,000.0+	147
Dealer Tire L.L.C.³ Cleveland (www.dealertire.com)	1,000.0+	20
Tire Hub L.L.C.⁴ Dunwoody, Ga. (www.tirehub.com)	*1,000.0	83
U.S. AutoForce⁵ Combined Locks, Wis. (www.usautoforce.com)	N.A.	25
Dunlap & Kyle Co. Inc. Batesville, Miss. (www.dktire.com)	536.0	17
K&M Tire Inc.⁶ Delphos, Ohio (www.kmtire.com)	*350.0	27
TR Wholesale Solutions⁷ South Bend, Ind. (www.tirerack.com)	N.A.	9
Treadmaxx Tire Distributors Inc.^{8,9} Atlanta (www.kauffmantire.net)	265.0	14
Max Finkelstein Inc.⁹ Astoria, N.Y. (www.maxfinkelstein.com)	N.A.	15
Friend Tire Co.¹⁰ Monett, Mo. (www.friendtire.com)	150.0	7
Community Wholesale Tire Distributors Inc. St. Louis (www.itdroll.com)	130.0	3
Omnisource United Inc.¹¹ Dallas (www.omnisourceusa.com)	100.0	13
Graham Tire Co. Spencer, Iowa (www.grahamtire.com/www.grahamtire.net)	66.0	N.A.
Exxpress Tire Delivery¹² Buffalo, N.Y. (www.etdonline.net)	65.0	7
Sullivan Tire Co. Inc. Norwell, Mass. (www.sullivantire.com)	60.0	12
Moore's Tire Sales Inc. Owego, N.Y. (www.moorestiresales.com)	57.8	12
S&S Tire Wholesale¹³ Lexington, Ky. (www.sstire.com/wholesale)	N.A.	11
Lucy's Tires Inc. Medley, Fla. (www.lucystire.us)	48.0	1
Tire Distributor Xperts¹⁴ Gardena, Calif. (www.tdexpert.com)	N.A.	9

* - Fiscal 2017 sales/revenue; data for NTW and TireHub are proforma results

1 - Franchisor of the Tire Pros dealer concept; also has 24 warehouses in Canada and 2 in China; offers 'Service Bay' for customers.

2 - Group Michelin-Sumitomo Corp. of Americas joint venture involving Michelin's TCI and TBC Corp.'s Carroll Tire wholesale distribution businesses.

3 - Services new-car dealerships exclusively.

4 - Bridgestone Americas and Goodyear joint venture, involving Bridgestone's Tire Wholesale Warehouse and Goodyear's wholesale distribution assets, including Dapper Tire.

5 - Promoter of 'Tire One' and 'Tread Pros' retail dealer programs; includes Tire's Warehouse, acquired in 2018.

6 - Promoter of the 'Mr. Tire' and 'Big 3' retail dealer marketing programs.

7 - Tire Rack Inc.'s wholesale distribution business

8 - Formerly the wholesale business of Kauffman Tire Co.;

retail business sold in early 2018 to Mavis Tire Supply.

9 - Treadmaxx and Max Finkelstein formed a wholesale buying group, Tire Distributors of the Americas L.L.C., in 2018.

10 - Yokohama Tire Corp. subsidiary.

11 - U.S. subsidiary of Singapore's Omni United (S) Pte. Ltd.

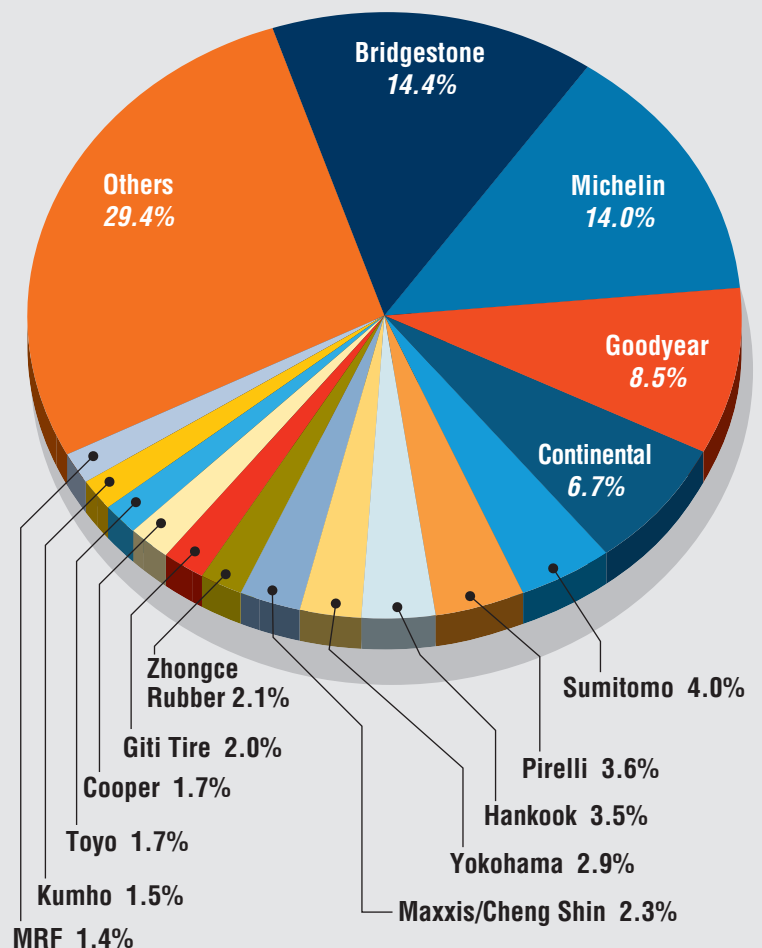
12 - Wholesale business of Dunn Tire L.L.C.; promotes its own 'Express Car Care Centers' program.

13 - Ziegler Tire subsidiary.

14 - Tireco Inc. business unit.

Global tire sales

The 15 largest tire manufacturers accounted for about 70.6 percent of the world's \$168.8 billion tire sales in 2017.



Source: Tire Business

TIRE BUSINESS graphic by michaelMcCrady

Industry groups weigh in on infrastructure, tariffs

Continued from page 3

the USTMA was pleased with Mr. Trump's comments on infrastructure investment.

"USTMA supports this undertaking and believe it's critical that the president and Congress establish sustainable, long-term funding for a significant infrastructure package," Ms. Luke said.

New infrastructure investment also provides an opportunity for products such as rubber-modified asphalt to gain acceptance in federally funded highway projects, she said.

However, the administration must be cautious in framing its tariff and trade policies, Ms. Luke said.

"Stability and certainty in our supply chain is critical to the competitiveness of U.S. tire manufacturing operations and vital to sustained growth in our domestic operations," she said.

"True to our mission of enhancing the competitiveness of U.S. tire manufacturers, we will continue to oppose restrictive trade policies that would increase the cost or limit the availability of raw materials, other feedstocks and capital equipment," she said.

While tire dealers and retreaders are generally supportive of Mr. Trump's economic and business policies, they are split on tariffs, ac-

ording to Mr. Littlefield.

Retreaders are suffering greatly because of competition from inexpensive Chinese tires, but tire distributors count on having those tires to meet demand in the lower tiers, he said.

The industry also is concerned about the repeal of NAFTA and whether Congress will approve the USMCA, Mr. Littlefield said.

"Look at some of the manufacturers in our industry," he said. "They've invested heavily in building operations in Mexico."

For tire dealers, Mr. Trump's advocacy of paid family leave was the most puzzling part of the speech, according to Mr. Littlefield.

"In our industry, there are specialists," he said. "We have people who specialize in retreading, or in servicing truck tires. It's not like our people can take 16 weeks off and they can be replaced temporarily by someone hired off the street."

Driving American Jobs — a coalition whose members include the Auto Care Association (ACA), Motor & Equipment Manufacturers Association (MEMA), Specialty Equipment Market Association (SEMA) and the Alliance of Automobile Manufacturers (AAM) — issued a statement stressing their opposition to tariffs.

"We look forward to working with the administration and lawmakers in both parties to find common-sense solutions to our problems that do not include tariffs targeting the automotive industry," the group said.

"Getting the policy wrong would needlessly hurt our economy, stifle innovation and put hundreds of thousands of jobs at risk," it said.

SEMA, the ACA, MEMA and the AAM already are on record as opposing the Reciprocal Trade Act. On Jan. 30, they were among 29 associations that signed an open letter to Congress, supporting the Bicameral Congressional Trade Authority Act of 2019 (BCTAA).

The BCTAA would require that the president submit to Congress any proposals to levy tariffs against imported products based on concerns of national security.

It also would narrow the concept of "national security" to pertain only to those goods with applications in military equipment, energy resources and critical infrastructure needs.

"This legislation ... is critically needed in order to ensure a proper weighing of the overall national interest before tariffs or quotas go into effect," the letter said.

Two associations that praised Mr. Trump's address were the National Association of Manufacturers (NAM) and the American Trucking Associations (ATA).

"Our industry is coming off the best year for manufacturing job creation in more than two decades," NAM President and CEO Jay Timmons said.

"The strength of our union is found in modern manufacturing, so President Trump was right to keep his focus on the men and women who make things in America," Mr. Timmons said.

ATA President and CEO Chris Spear praised Mr. Trump's call for action on infrastructure.

"Tonight President Trump called for a national, bipartisan effort to restore our country's declining infrastructure — and America's truckers are answering that call," Mr. Spears said.

Before the address, the United Steelworkers (USW) union urged Mr. Trump to honor his promises on trade.

"President Trump has embarked on several trade reform efforts, but the work to secure jobs and prosperity is far from complete," USW International President Leo Gerard said. "The administration has made far too little progress to suggest that the president's trade promises have been kept."

Michelin eyes modest growth

Continued from page 4

ability to increase operating income and sustain the improvements in structural free cash flow achieved in recent years" in what he termed a "difficult economic environment."

Mr. Senard stressed the company's acquisitions of conveyor belting producer Fenner P.L.C. and industrial tire producer Camso Inc. and the creation of the wholesaling joint venture in the U.S. with TBC Corp., saying these transactions "have strengthened the group in key markets and provided new opportunities to create value."

These transactions, plus Michelin's more recent agreement to buy Indonesia's P.T. Multistrada, could boost the French company's annual revenue by up to \$2 billion.

The firm's operating income ratio improved slightly to 12.6 percent, Michelin noted. Net income slipped 1.9 percent to \$1.96 billion.

The company also noted it restructured its operating segments this past year, with sales of replacement light truck

tires being reported in the "road transport" segment (formerly the truck tire segment) and construction truck tires as part of the specialty businesses segment.

Considering the expected impact of its 2018 acquisitions, Michelin published a relatively modest fiscal 2019 forecast — volume growth in line with global market trends; segment operating income exceeding the 2018 figure at constant exchange rates and before the estimated \$175 million in contributions from Fenner and Camso; and structural free cash flow of more than \$1.7 billion. Raw materials costs are expected to have a negative impact of about \$117 million.

In North America, Michelin said it gained consumer tire market share with its Michelin and BFGoodrich brands, while sales of the Uniroyal brand fell "sharply" due to its incomplete product coverage. In the truck tire area, Michelin's volume suffered from certain unspecified supply chain issues and the Uniroyal brand's insufficient market coverage, the company said.

Goodyear earnings, sales decline in Q4

Continued from page 4

from net discrete tax items. Full-year 2018 adjusted net income dropped 29.7 percent to \$555 million.

For the fourth quarter, segment operating income dropped 29 percent to \$307 million. The Akron-based tire maker said lower volume and the unfavorable impact of foreign currency translation, partially offset by improved price/mix, net cost savings and improved overhead absorption, also impacted the quarterly results.

Goodyear reported net income of \$110 million, compared with a net loss of \$96 million in the 2017 period, despite a 5-percent drop in sales to \$3.9 billion. The decrease was driven by unfavorable currency translation and lower volume, offset by partial improvements in price/mix.

Tire unit volumes of 40.7 million fell 3 percent from a year ago. Replacement tire shipments were nearly flat, as weakness in Brazil and China offset growth in Europe. Original equipment unit volume decreased 10 percent, Goodyear said, pointing to lower automotive production in China and India.

"Our teams delivered several operational wins in 2018, including increasing our consumer replacement volume and building our OE pipeline by securing numerous fitments, notably on future electric vehicles,"

said Richard J. Kramer, chairman, CEO and president. "These achievements are a testament to our product innovation, the strength of our distribution network and the value of the Goodyear brand."

The company achieved several "strategic objectives" that he said "strengthen our connected business model and move us closer to our customers, allowing us to improve our service levels and positioning us to be a leader in the changing mobility landscape."

"While many of the macro challenges we faced in 2018 have extended into 2019, we continue to build on what we accomplished last year and remain focused on delivering a higher level of earnings over the longer term."

Operating income fell nearly 18 percent in the Americas segment for the fourth quarter, from \$217 million in 2017 to \$179 million last year. Operating income also dropped for the full year in the segment, from \$847 million in 2017 to \$654 million in 2018.

Operating income dropped slightly in Europe, Middle East and Africa both for the quarter and for the year. In the Asia-Pacific segment, operating income plummeted nearly 50 percent, from \$117 million in 2017 to \$54 million in 2018. For the full year, operating income declined to \$257 million from \$342 million in 2017.

Goodyear launches winter tire, Eagle F1 successor at dealer meeting

By Don Detore

Tire Business Staff

GRAPEVINE, Texas — Goodyear introduced two new products, expanded the size offering of another and touted the mileage performance of a fourth product during the company's annual dealer meetings, Jan. 27-29, at the Gaylord Texan Resort in Grapevine.

The Akron-based tire maker:

- Released the Eagle Exhilarate, an ultra-high performance all-season tire;
- Released the WinterCommand, a mid-tier winter tire;

- Expanded the size range of the Wrangler Fortitude HT cargo van tire; and

- Announced the Endurance LHS long-haul steer tire is delivering strong mileage performance in fleet testing.

The Eagle Exhilarate replaces the Eagle F1 Asymmetric All-Season in the Eagle lineup and will be available in April, Goodyear said. Its potential fitments include the Ford Mustang, Chevrolet Camaro, BMW 3-Series, Porsche Cayman, Dodge Challenger, Audi A6, Cadillac CTS, BMW 5-Series, Mazda 6, Porsche Cayenne, Mercedes E-Class and Lexus LC.

In development for three years, the new tire features a built-in wear gauge tool placed in eight locations around the tire, as well as a "high-performing" tread compound fortified with "traction resins" for enhanced handling and traction in wet, dry and snow conditions. It will be offered in 36 W or Y speed-rated sizes.

The Eagle Exhilarate also has ActiveGrip, ActiveBraking and Active Strength Technology, which combine for a lightweight construction and help yield shorter braking distances on wet and dry surfaces and more precise steering and control, Goodyear officials said,

Goodyear's latest winter tire, the WinterCommand, is a studdable mid-tier winter tire available in 54 sizes covering fitments on passenger cars, CUVs, SUVs and light trucks in Q, S or T speed ratings.

The WinterCommand features a proven winter tread compound, specialized winter tread patterns and full depth zig-zag sipes, features that allow it to carry the three-peak mountain snowflake designation, Goodyear said.

It will have three tread pattern variations, each designed for specific vehicle



Goodyear has launched the Eagle Exhilarate and WinterCommand.

types for optimal performance.

"This is the start of a concentrated focus on enhancing Goodyear's winter portfolio," said Mike Dwyer, Goodyear's chief customer officer, North America consumer. "As we look to revitalize our winter line, we are confident that the WinterCommand gives us a strong winter offering that will drive growth in a segment with enormous potential."

The WinterCommand, which will be available in March, grips well at low temperatures thanks to tread patterns that feature multiple biting edges designed for starting and stopping on snowy roads, the tire maker said.

Meanwhile, Goodyear has expanded

the portfolio of the Wrangler Fortitude HT, a long-lasting "rugged" light truck tire with sizes designed for the growing cargo van segment.

Initially launched in 2014, the Fortitude HT offers an optimized tread design, tough tread compound, full-depth sipes and wide circumferential grooves to help reduce road noise, provide uniform wear and improve tread life, Goodyear said.

Goodyear is expanding the current line of 35 SUV/CUV and light truck sizes with three C-type sizes, including the popular 235/65R16C, and 10 heavy-duty LT sizes, for a total of 48 sizes. The size expansion will help dealers address a segment that has grown by more than 600,000 full-size cargo vans over the past two years, Goodyear said.

The Fortitude HT handles variable loads and maintains performance under stress, Goodyear said. Its optimized tread design, tough tread compound, full-depth sipes and wide circumferential grooves help reduce noise, provide uniform wear and provide wet traction.

Some vehicle fitments for the Wrangler Fortitude HT are the Ford Transit, Ram ProMaster, Chevrolet Express, Mer-

cedes Sprinter, Nissan NV3500, Ford F150/F250/F350 and Chevrolet Silverado 1500/2500/3500.

Finally, the Endurance LHS long-haul steer tire, which debuted in June, has given fleet owners as much as 210,000 miles in original tread life, Goodyear claims.

According to Mahesh Kavaturu, Goodyear's director of technology, commercial tires, 13 fleets have evaluated the tire, logging more than 13 million combined miles. More than 200 fleets are running the product.

The Endurance LHS is SmartWay-verified and is a key part of Goodyear's Total Solution of products, services and fleet management tools.

The tire has a wear-resistant tread compound and is designed with a dual-layer tread with uniform stiffness for slow, even wear. Its rigid casing construction allows for a consistent footprint, Goodyear said, as well as low rolling resistance.

The Endurance LHS is available in four sizes — 295/75R22.5; 11R22.5; 285/75R24.5; and 11R24.5 — in load ranges G and H.

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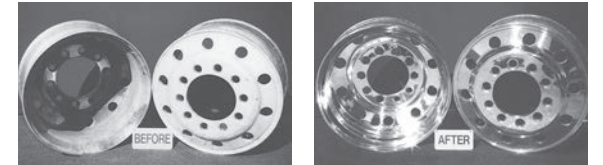
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Goodyear targets Q3 for program to go live

Continued from page 1

"This is the next step in our evolution of our consumer e-commerce program," said Paul Green, a category manager, who was among a group of Goodyear representatives to discuss the new endeavor.

"We want to leverage all of the relationships we've built to give them an easier, better solution to reduce friction that could be a part of buying tires today," said Dustin Lancy, product manager.

The program works much the same way as its consumer counterpart.

Commercial tire customers — Goodyear is targeting owner-operators with up to 10 vehicles — access the website to research tires, purchase them online via a credit card, and then schedule installation at one of the Goodyear-aligned dealers.

Customers can't schedule installations for the next 24 hours, giving

Goodyear the opportunity to secure the inventory as well as the installer a chance to reach out and confirm or reschedule the appointment, whichever is more convenient for both parties.

The goal is to get 2,000 dealers signed up to participate in the program, according to Mr. Green, which would give customers good coverage across both urban and rural areas of the U.S.

"For a commercial (tire) guy, it's very similar for a national account and government accounts," Mr. Green said. "When they install, we credit them for the tire sale and give them back their cost to replace it, ... and they receive all that installation fees.

"Maybe they'll see an alignment or an oil change or some other service while they're in the shop."

Mr. Green said pricing will be on par with counter sales and be consistent across the country, and the tire maker will have the ability to offer some owner-operator or contractor groups or associations a discounted price. "We don't want it to be a disruptive price."

Brent Bingham, owner of family-owned Bingham Tire in Barbourville, Tenn., said he believes the program is going to be "good for everyone."

"It's up to the dealer and how far they take it," said Mr. Bingham, who sells Goodyear's entire portfolio at his three locations.

He said the program can capture customers who might be surfing the inter-

net to find tires as they rest.

"He goes online and buys tires, comes to our shop and gets it done," Mr. Bingham said.

"Once he's there, we capture him. We hope he adds (services) to them. We hope we can teach them about retreads, educate them about the tire business. We hopefully can turn him into a customer."

Mr. Bingham, one of 11 dealers who serve on Goodyear's dealer advisory committee, said the tire maker has been more communicative about this process than it had been during the consumer tire e-commerce rollout. While some dealers were "kind of shocked" when that program was released, that isn't the case now.

"They are taking what we bring to the table and listening to us and (our feedback)," said Mr. Bingham, whose father opened the dealership in 1964. "They're asking us about this. I'm 100-percent behind them."

Mike Manges, manager of commercial/off-highway tire communications, emphasized the program isn't designed to replace or alter existing customer-dealer relationships.

"It gives owner-operators and small fleets another avenue to buy Goodyear and meet the Goodyear dealer who can help lower their operating cost over the long-haul," Mr. Manges said. "It's incremental business."

That has happened for Mr. Bingham's dealership by aligning with the consumer e-commerce tire program. He said he sells three to four more sets of tires per month because of the program, increasing his sales 3 to 5 percent.

"It's opened up other avenues for us," Mr. Bingham said. "We are getting customers who may not find us otherwise."

Those customers, he said, usually purchase other services, such as an alignment or oil change. He said 90 percent of them are new customers who return for more service.

Most of the time, he can beat Goodyear's price. But if not, he's not concerned.

"If my customer goes online, and Goodyear gives them a better price than I can, I'm glad they're getting a good deal," Mr. Bingham said. "(He) saved some money. But he's still coming to me to get the work."

"If he got them online and didn't do that, he might have gone 20 miles away to another dealer and bought the tire. At least we're capturing that customer and making sure he's comes back to us."



Green

Kramer: Tire industry still strong

Continued from page 1

at the Gaylord Texan in Grapevine. "We only recognized (an inflection point) after it has occurred."

Case in point: The Great Recession of 2007-08. The inflection point didn't happen when banks went bankrupt, he said. Instead, the inflection point occurred much earlier with low interest rates, the onset of sub-prime mortgages and the housing bubble.

"When that bubble burst, the recession was full on," Mr. Kramer said. "It was here."

The tire industry, he told dealers during his 40-minute talk, is at an inflection point, pointing to the advance of technologies that are impacting the industry, such as electric and/or autonomous vehicles and the proliferation of ride-sharing.

"The rapid development and growing comfort of this kind of disruption is only going to increase," he said.

Mr. Kramer identified four areas that indicate inflection points:

- Changes in OEM business models;
- Changes in how vehicles are being used;
- Shifts in competition; and
- The changing consumer.

The Big 3 domestic auto makers — Ford Motor Co., General Motors Co. and Fiat Chrysler Automobiles (FCA) — are eliminating or severely reducing the models of sedans they manufacture in the coming years in favor of more profitable light trucks, SUVs and CUVs.

"Candidly, it's hard to comprehend," Mr. Kramer said, "but the car companies are actually getting out of the car business."

In addition, these companies are firmly planting themselves in the mobility space — investing millions in mobility options, including owning and operating fleets — clearly signaling a new business model.

"That's an inflection point," Mr. Kramer said, "and nothing in the car industry is ever going to be the same."

Meanwhile, consumers' approach to vehicles continues to evolve, Mr. Kramer said.

Cars, he said, sit idle 95 percent of the time. And he said, the cost to operate a vehicle is roughly \$2 a mile.

Electric vehicles, he said, or ride-sharing, are likely to reduce that cost to 50 cents per mile or less.

With improved reliability and lower cost, "all that adds up in my world as having a significant impact on mobility," he said.

The model that is developing, he said, is on-command vehicles, especially in urban environments.

"Every day people are becoming more comfortable with the concept of shared, as an alternative to personally owned (vehicles)," Mr. Kramer said. "I suggest the entire purpose of the car is at an inflection point and pretty soon, it's never going to be the same."

Competition, he said, is fierce, particularly from startups that believe they can make the better tire. They don't worry about what can't be done; they only think of what's possible.

"That's different and dangerous competitors," Mr. Kramer said. "Some of these will succeed, but more than likely most of these are going fail. But they represent a different way to look at our industries. We ignore that disruption at our own peril."

The faces of competition also are changing, Mr. Kramer said. Competition has wrought consolidation and new



Rich Kramer
Goodyear CEO, chairman and president

Tire Business photo by Don DeIorio

investors who focus on growth more than profit.

"I don't think I exaggerate when I say the traditional ways of competition are gone, and similar formats and conventional goals are behind us to a large degree," Mr. Kramer said. "Competition is at an inflection point, and it will never be the same."

Finally, the changing consumer, he said, continues to affect the tire industry. Convenience drives most consumers to such staples of today as Uber, Wayfair and Amazon.com.

"They sound crazy, even unimaginable until they were inevitable," he said of these new ventures. "We might even say, until they were expected."

Mr. Kramer said the tire industry must adapt — with balance — while avoiding complacency.

And he reminded the assembled dealers that not only is the tire industry strong today, it also will be in the future.

All vehicles, owned or shared, with a driver or autonomous, with elective motor or gas combustion engine, they all need tires now and they're going to need them tomorrow, Mr. Kramer said. "Our business is strong. Keep that in mind. Never lose sight of that."

It is just as important, he said, to recognize the inflection points that shape our lives, particularly in the tire business. Be alert, he said, as changes often are gradual and the results aren't always apparent initially.

"The changes impacting our business have started even though you can't see them," he said.

Mr. Kramer lauded the Goodyear dealers for their commitment to the brand. At the end of his speech, he paid tribute to family-owned tire dealership and distributor Max Finkelstein Inc., which has been a Goodyear dealer for 96 of its 100 years in business.

Mr. Kramer told the dealers that miles traveled are expected to increase, and "that means more tread rubber is burned and that means more tire sales. And that is a fantastic thing for all of us."

Goodyear, he said, has a culture of innovation, and it continues to have a "seat at the table" with OEMs, as they shape the industry of the future.

"None of these things alone will win in the tire business," Mr. Kramer said. "But all together we can turn that inflection point into a springboard of a new generation of success."

"Some things are going work. Some things won't. But as (Winston) Churchill said, 'Success is not final, failure is not fatal: It is the courage to continue that counts.'"

Bridgestone invests in auto racing

Continued from page 1

Technical Center in south Akron. Production could start as early as late 2020, Ms. Adams said, but the entire project will take about four years to complete.

Bridgestone at this time did not disclose details as to the size or investment but said the new plant would accommodate the 50 workers employed now in race tire manufacturing.

Employment there could grow along with increased prototype tire production, Ms. Adams said, a development that Akron and Summit County officials welcomed.

The existing race tire unit occupies 100,000 square feet at the old Firestone factory. Bridgestone supplies IndyCar with about 26,000 tires a year, including 6,000 alone for the annual

Indianapolis 500.

Bridgestone had extended its lease with the city of Akron on the manufacturing space at the former Firestone headquarters in late 2016 for two more years. Akron had acquired the building in 2012 after Bridgestone moved its research and development unit to a purpose-built facility a mile south.

The new plan involves another contract extension with the city to keep the race tire unit operating in the Firestone building. The city at one time was to raze the structure, but city and county officials now say they are evaluating a number of different options for the 750,000-sq.-ft., five-story structure.

The decision to keep race tire production in Akron reflects the company's heritage in the city, Nizar Trigui,

chief technology officer, said.

"The Akron community and race tire development have each played significant roles in our company's past, and they will continue to drive innovation for us in the future" he said.

IndyCar President Jay Frye lauded Bridgestone for its decision to make a "huge investment" in racing.

"This extension also reflects Firestone's commitment to helping to shape IndyCar's paddock-wide, five-year plan," he said.

The contract extension with IndyCar includes "comprehensive, season-long activation," Bridgestone said, including fan engagement, sponsorships and signage at multiple venues, "robust" social and digital media programs, etc.

Bridgestone, through its Firestone



Tire Business photo by Bruce Davis

On hand for the Feb. 6 announcement by Bridgestone Americas are, from left: Brad Beckert, development engineering manager, Office of Integrated Development, city of Akron; Cara Adams of Bridgestone; Summit County Executive Ilene Shapiro; racing legend Al Unser Jr.; and Samuel DeShazor, deputy mayor of Akron.

brand, recently secured the title sponsorship for the next two years for the season-ending race of the NTT IndyCar Series season, set for Sept. 20-22 at WeatherTech Raceway Laguna Seca near Monterey, Calif.

Firestone also is the title sponsor of the season-opening race, the Firestone Grand Prix of St. Petersburg, which will be held March 8-10 on the combined airport runway/city street course in St. Petersburg, Fla.

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