NEXT
The US and Global Retreading Markets
Including data from Joint US International Trade Commission Study
Evolution of Retreading in the US

NUMBER OF PLANTS HAVE DECLINED WHILE OUTPUT HAS REMAINED SAME
Types of Retread Plants in US

- Commercial Truck: 680
- OTR: 18
- Aircraft: 5
- Passenger: 4

Legend:
- Commercial Truck
- OTR
- Aircraft
- Passenger
Commercial Truck Retread Processes in US

- Pre-cure: 94%
- Mold Cure: 6%
US Retreading Systems

# of Retread Plants

- Bridgestone/Bandag
- Michelin/Oliver
- Goodyear
- Marangoni
- Hawkinson
- Continental
2012 US Market Share - Retreaded Truck Tires

Based on Units

- Bridgestone: 42%
- Goodyear: 27%
- Michelin: 5%
- Marangoni: 4%
- Others: 23%
Environmental Benefits of Retreading

Increasingly important in the marketplace and to end users

- **SmartWay**
- **Raw Materials**
- **Landfills**
- **Executive Order**

- 22 Gallons vs. 7 Gallons of Oil
- Steel, Natural Rubber, Carbon Black
- Millions of tires kept out of landfills
- US Government Requirement to Use Retreads
- EPA Smartway Verification
2011 US Exports of Retreaded Tires
$18 Million Total

- Mexico: 11%
- Canada: -43%
- Vietnam: -9%
- South Africa: 710%
- EU: -23%
- Guatemala: 256%
- All Other: 58%
2011 US Imports of Retreaded Tires
$11 Million Total

<table>
<thead>
<tr>
<th>Country</th>
<th>Thousand $</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Canada</td>
<td>$8,000</td>
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<td>EU</td>
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<td>Israel</td>
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2011 Global Exports of Retreaded Tires
$253 Million Total

- EU: $120,000
- Thailand: $20,000
- Hong Kong: $20,000
- South Korea: $20,000
- US: $20,000
- China: $10,000
- Canada: $10,000
- Malaysia: $10,000
- Australia: $10,000
- Singapore: $10,000
- All Other: $10,000

Thousand $
Global Exports of Retreaded Tires
% Change from 2009 - 2011
2011 Global Imports of Retreaded Tires
$155 Million Total
Global Imports of Retreaded Tires
% Change from 2009 - 2011
2011 Global Exports of Used Tires & Casings
$383 Million Total

Japan: $180,000
EU: $160,000
US: $140,000
Canada: $120,000
Switzerland: $100,000
Hong Kong: $80,000
Korea: $60,000
Thailand: $40,000
Singapore: $20,000
Australia: $20,000
All Other: $20,000

Thousand $
Global Exports of Used Tires & Casings
% Change from 2009 - 2011
2011 Global Imports of Used Tires & Casings
$300 Million Total

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Global Imports of Used Tires & Casings
% Change from 2009 - 2011

Korea: 115%
Guatemala: 80%
US: 79%
South Africa: 58%
Mexico: 40%
Ghana: 31%
Georgia: 15%
Thailand: 14%
All Other: 13%
EU: 7%
Hong Kong: -10%