



#GoodyearEF1A3SUV



**GOODYEAR**

**Eagle F1 Asymmetric 3 SUV**

**Event**



**GOODYEAR**

MADE TO FEEL GOOD.



**120 YEARS OF INNOVATION**



# Eddy Geerdink

Director Marketing Execution Consumer Tires

Goodyear Europe, Middle East & Africa



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# Eagle F1 Asymmetric 3 SUV Event Program

## May 16<sup>th</sup>

Until 17:00	Arrival at Hotel, check-in
18:00-18:45	Product presentation
18:45-19:15	Transfer to restaurant
19:15-19:45	Aperitif
19:45-22:00	Dinner
22:00-22:30	Transfer back to hotel

## May 17<sup>th</sup>

07:00 - 07:45	Breakfast and check-out
07:45 - 08:30	Transfer color groups to Mireval test track, safety briefing in workshops
08:30 - 12:30	Workshop rotations (60 min each): 1. Dry handling 2. Wet handling 3. Slalom & braking challenge 4. Wet braking
12:30 - 13:00	Lunch and Farewell
13:00 - 13:30	Transfer to Montpellier Airport



## Welcome to the Goodyear Eagle F1 Asymmetric 3 SUV Event

### Why are you here today?

To experience the new Goodyear Eagle F1 Asymmetric 3 SUV

1.

Provide insights into the SUV tire market

2.

Unveil the research and development that goes into our award-winning SUV tires

3.

Test Goodyear Eagle F1 Asymmetric 3 SUV yourself



# Ralf Reinardt

Technology Project Leader

Goodyear Europe



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GOOD  YEAR

INNOVATION CENTER

**GOODYEAR**

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# Global Research & Development Network



Colmar-Berg,  
Luxembourg



Hanau, Germany



Dalian/Pulandian, China



Akron, Ohio USA





# Test tracks around the world



Ohio, USA



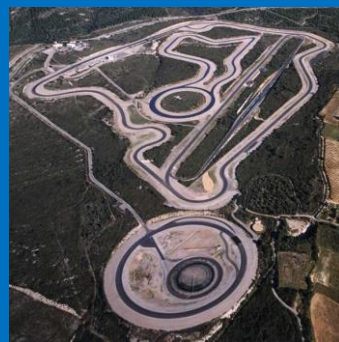
Brasil



Luxembourg



Texas, USA



Mireval, France



Wittlich, Germany



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# Mireval Proving Grounds



**Total length:**  
8.6 km (5.3 miles)

**Straight line:**  
0.8 km (0.5 miles)

**Area:**  
168 Ha (373 acres)

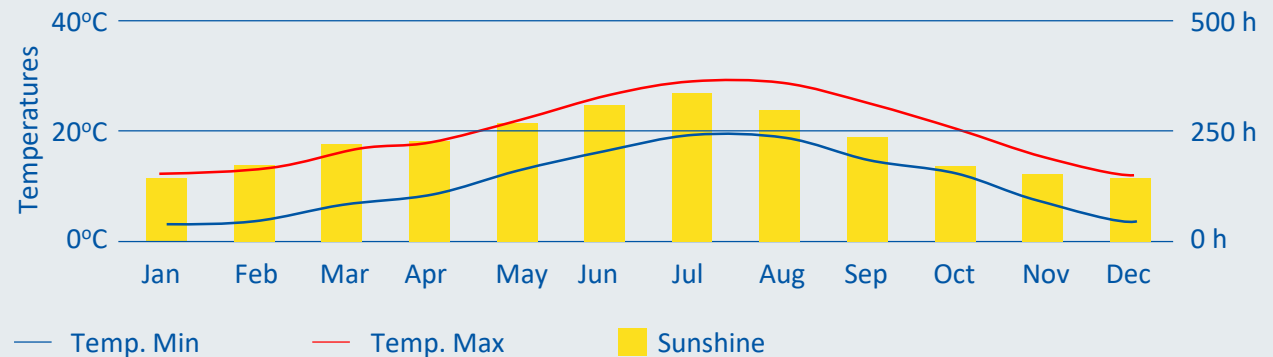
*A location for all year  
round tire & vehicle  
evaluation on dry & wet*



## General info Mireval Proving Grounds

- **53 associates on site**
  - Performance drivers
  - Measurers
  - Helpers
  - Mechanics
  - Instrumentation
  - Information Technology
  - Site maintenance
  - Engineering & EHS
  - Administration

- **+/- 250 vehicles**
- **Subjective and objective tests performed all year long**
- **10 lifts, 3 for visitors with independent offices**
- **272 dry days per year (2016)**







# External proving grounds



Nardo, Italy



Papenburg, Germany



Idiada, Spain



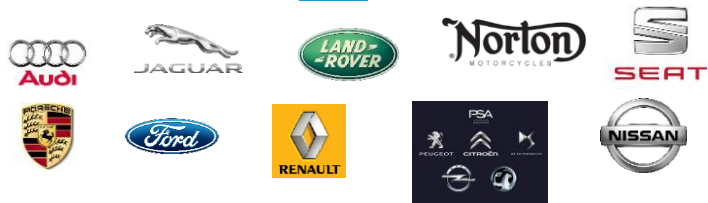
## Mireval Proving Grounds Missions

- **Produce quality road test data to support new product development**
  - Objective and instrumented test
  - Car, Light and Heavy Truck, Motorcycle
- **Support our customers**
  - Vehicle manufacturers joint tests
  - Marketing: magazine tests, launches
  - Dunlop Motorsport test sessions
- **Continuously improve safety, quality and efficiency**



# Mireval Proving Grounds Visitors

## VEHICLE MANUFACTURERS Tire & vehicle/prototype evaluation



## MOTORSPORT TEAMS



## DRIVER TRAINING



## PARTNERS



## MAGAZINES



## NEW PRODUCT LAUNCHES

- Media
- Dealers & distributors

## GOODYEAR/DUNLOP ASSOCIATES

- Innovation Centers, Sales & Marketing
- Internal auditors

## CUSTOMER SATISFACTION

- 2016: 94%
- 1.115 visitors





# Eddy Geerdink

Director Marketing Execution Consumer Tires

Goodyear Europe, Middle East & Africa

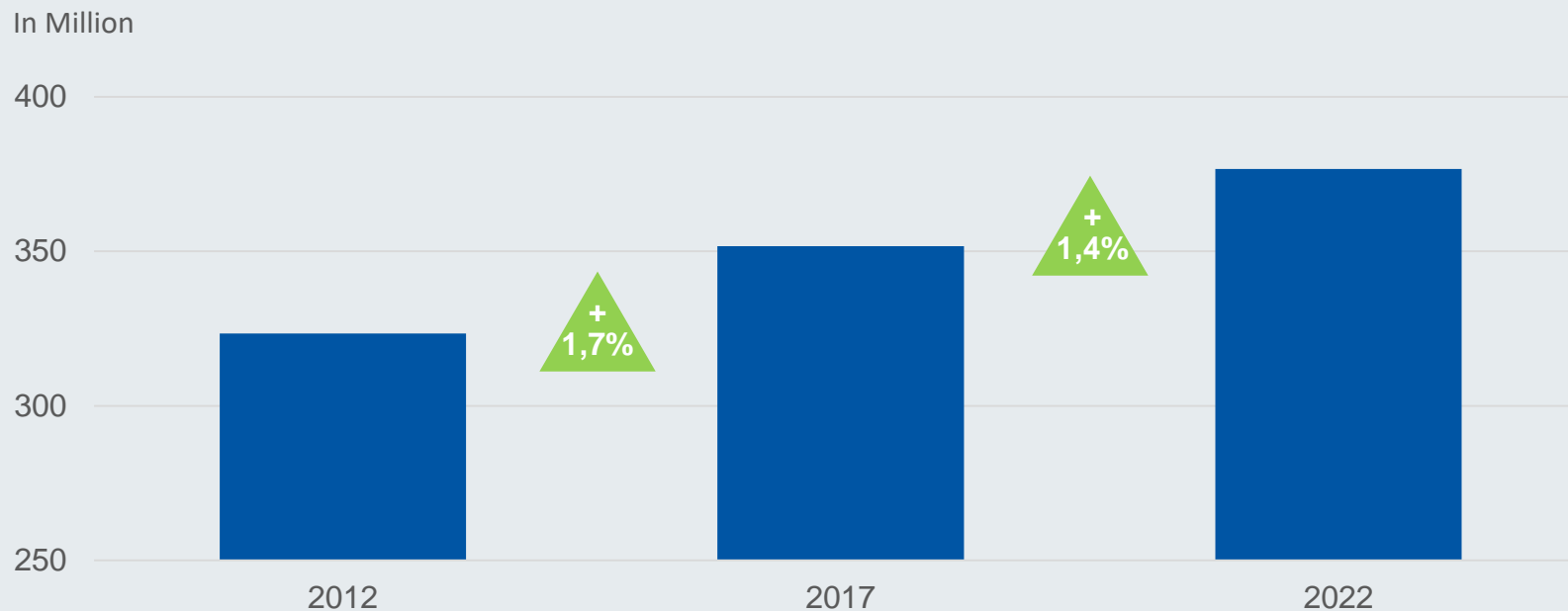


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# Market insights – Car park evolution 2012 - 2022

## Car park forecast - Europe



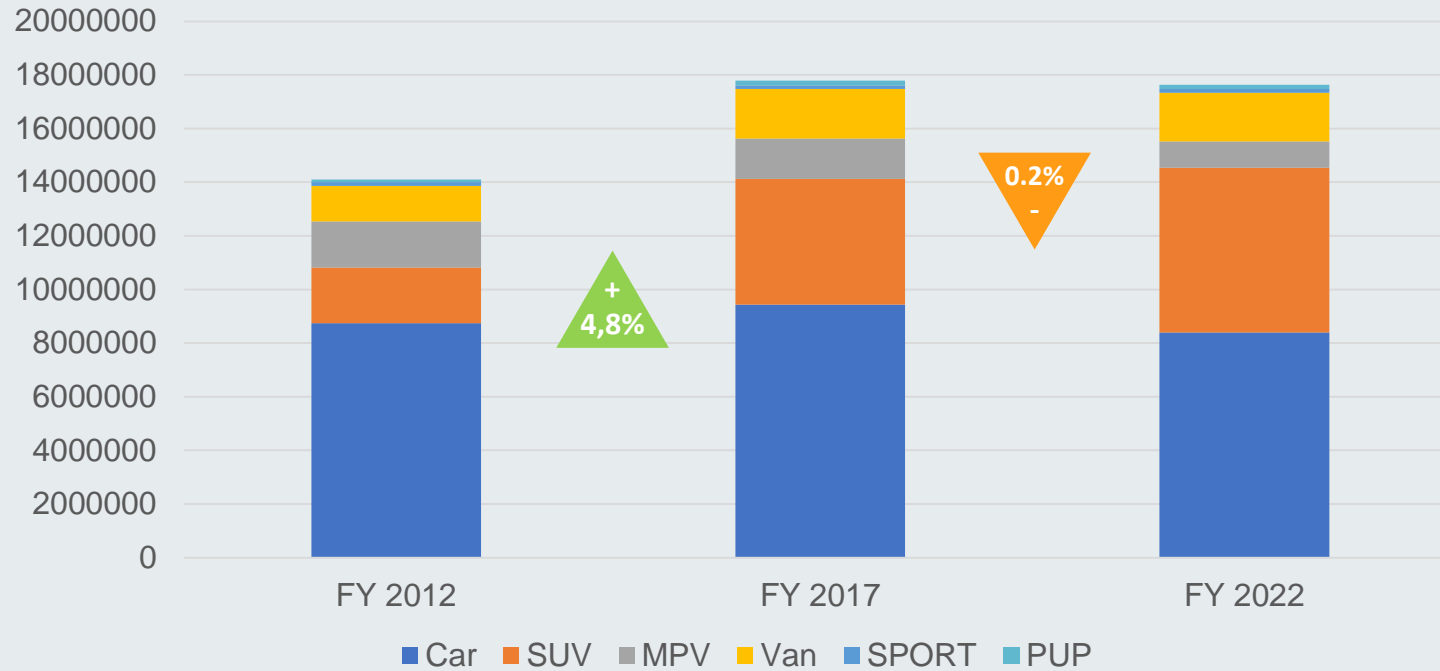
**Stable growth of the car park in Europe**

Source: IHS Automotive – World Park Data December 2017  
Countries: Europe (including Turkey, excluding Russia/CIS).  
\* Compound Annual Growth Rate from 2012 to 2022.



# Market insights – Light vehicle sales evolution 2012 - 2022

## Light vehicle sales forecast – Europe



CAGR* 2012 - 2022	
Car	-0.4%
MPV	-5.5%
PUP	5,2%
Sport	0%
<b>SUV</b>	<b>11.4%</b>
Van	3.2%
<b>Total growth</b>	<b>2,3%</b>

Note: PUP = pick-up | MPV = Multi-Purpose Vehicle

**SUV is the fastest growing light vehicle segment in Europe (CAGR +11.4%)**

Source: IHS Automotive – Light Vehicle Sales Forecast January 2018  
Countries: Europe (including Turkey, excluding Russia/CIS).  
\* Compound Annual Growth Rate from 2012 to 2022.

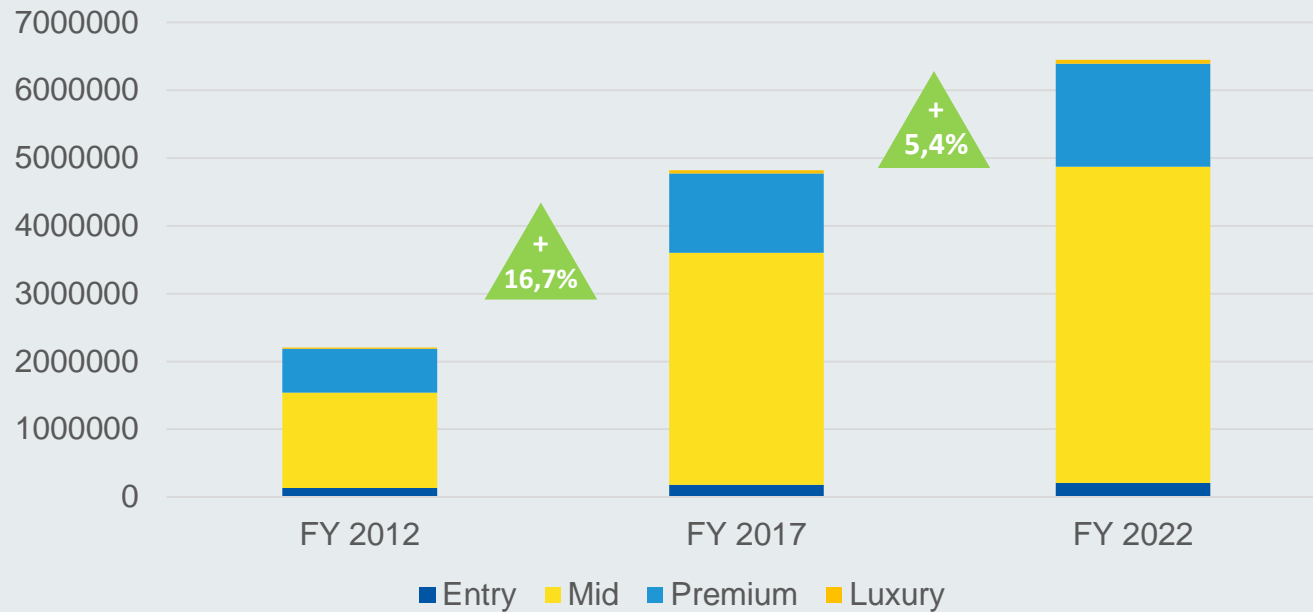










# Market insights – SUV vehicle sales evolution 2012 - 2022

## SUV new vehicle sales forecast by segment – Europe



	CAGR* 2012 - 2022	Vehicle examples
Entry 	4.3	Skoda Yeti, Renault Captur, Dacia Duster
Mid 	12.8	Fiat 500X, Peugeot 2008, Nissan Qashqai, Volkswagen Tiguan
Premium 	8.9	Volvo XC60, BMW X1, Mercedes-Benz GLA, Audi Q2
Luxury 	10.7	Bentley Bentayga, Maserati Levante, Porsche Macan

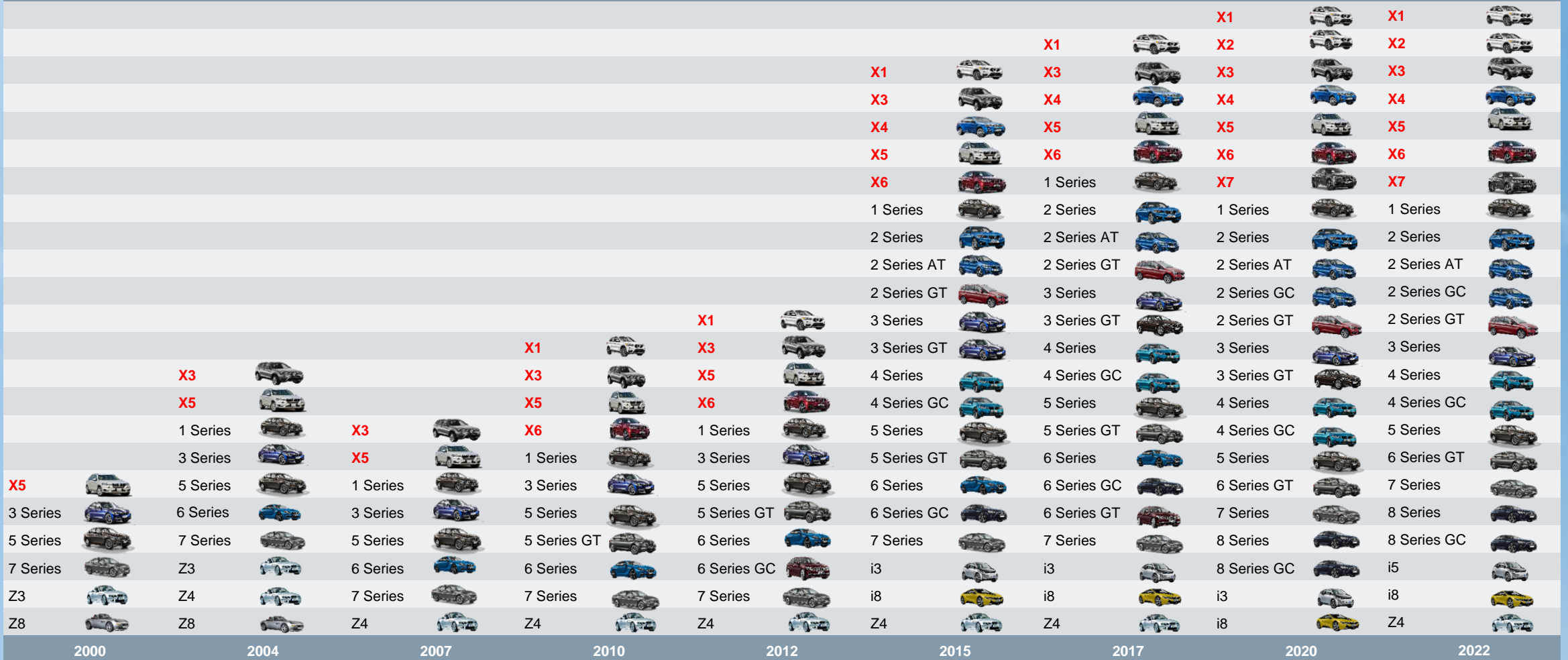
**SUV sales showing strong growth in all brand and model tiers  
Mid tier segment growing most (CAGR: +12.8%)**

Source: IHS Automotive – Light Vehicle Sales Forecast January 2018  
 Countries: Europe (including Turkey, excluding Russia/CIS).  
 \* Compound Annual Growth Rate from 2012 to 2022.



# OEM portfolio evolution

CAGR\* 2012 - 2022



**SUV/4x4 models becoming more prominent in OEMs product offering**



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Source: IHS Automotive – Light Vehicle Sales Forecast January 2018  
 Countries: Europe (including Turkey, excluding Russia/CIS).



# OEM portfolio evolution

## Increased SUV offering

Vehicle manufacturers have increased their SUV offering and will be increasing their offering further

In the past 5 years vehicle manufacturers have introduced **64 new models** in the SUV segment



At the moment **43 new models** scheduled to be launched



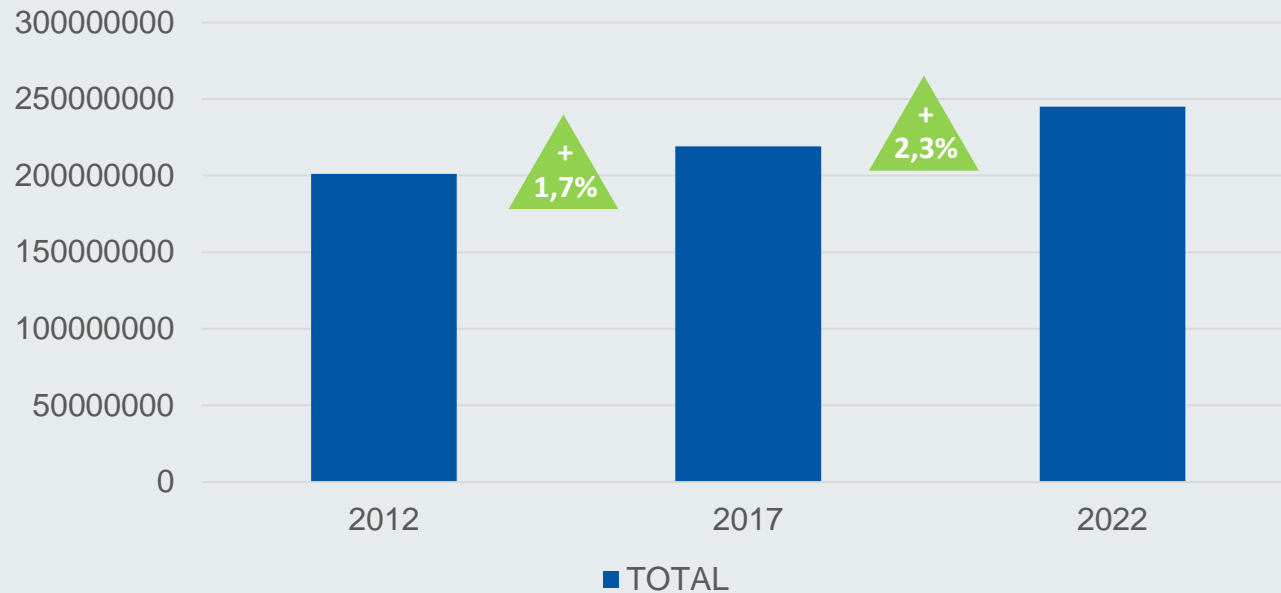
Source: IHS Automotive – Light Vehicle Sales Forecast January 2018  
Countries: Europe (including Turkey, excluding Russia/CIS).



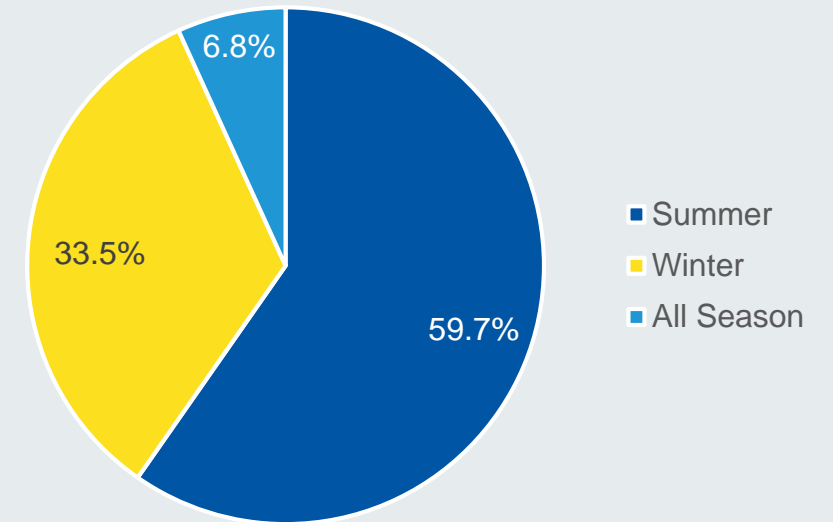


# Market insights – Total tire market 2012 - 2022

## Tire industry evolution - Europe



## 2017 Europe tire industry by seasonality



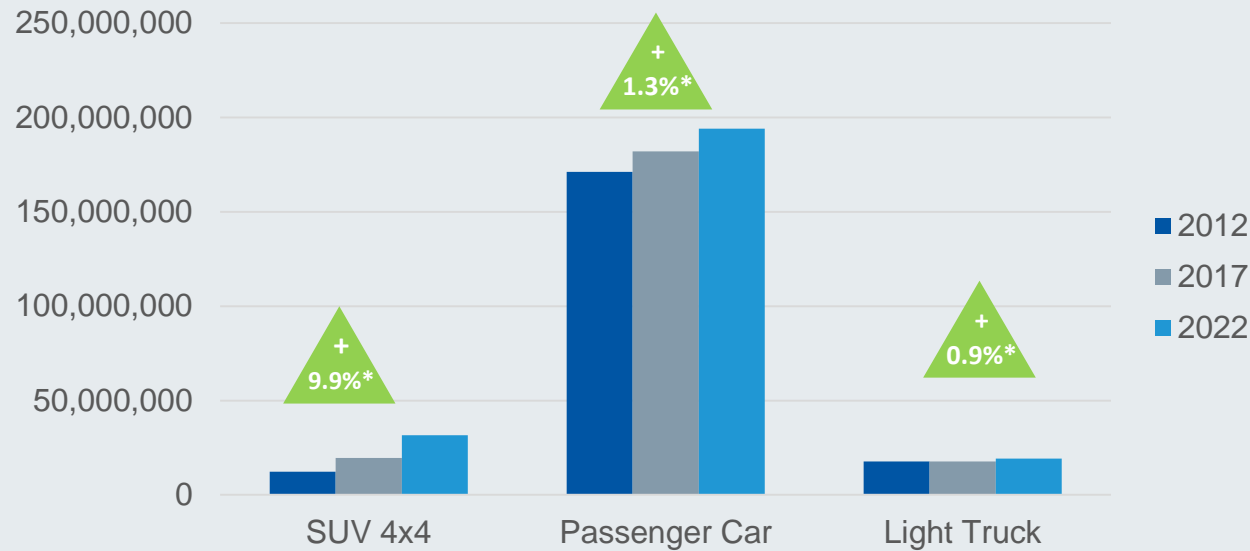
**Tire market in Europe expected to grow 2.0% (CAGR\*) from 2012 to 2022**

Source: Goodyear Estimates.  
Countries: Europe (incl. Turkey, excluding Russia/CIS).  
\*Compound Annual Growth Rate



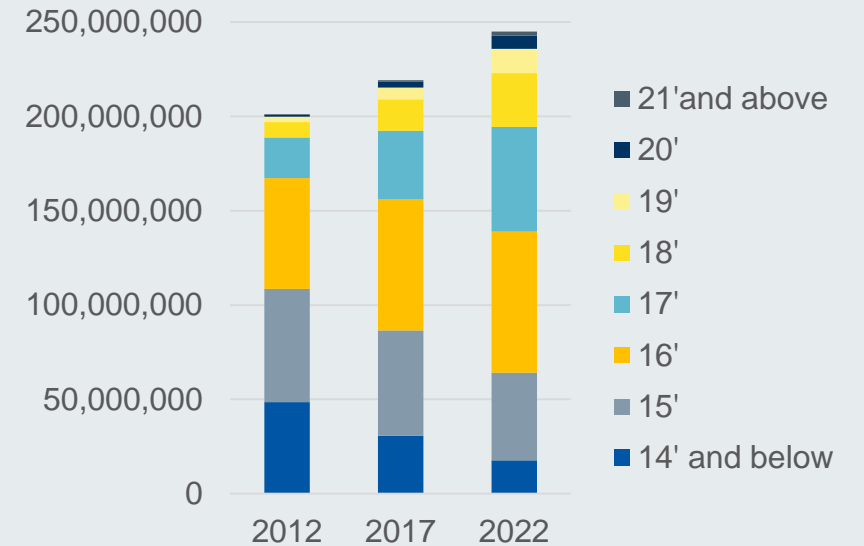
# Market insights –Tire market per segment 2012 - 2022

## Tire market evolution by vehicle segment - Europe



CAGR\* from 2012 to 2022.

## Tire market evolution by RIM size 2012-2017



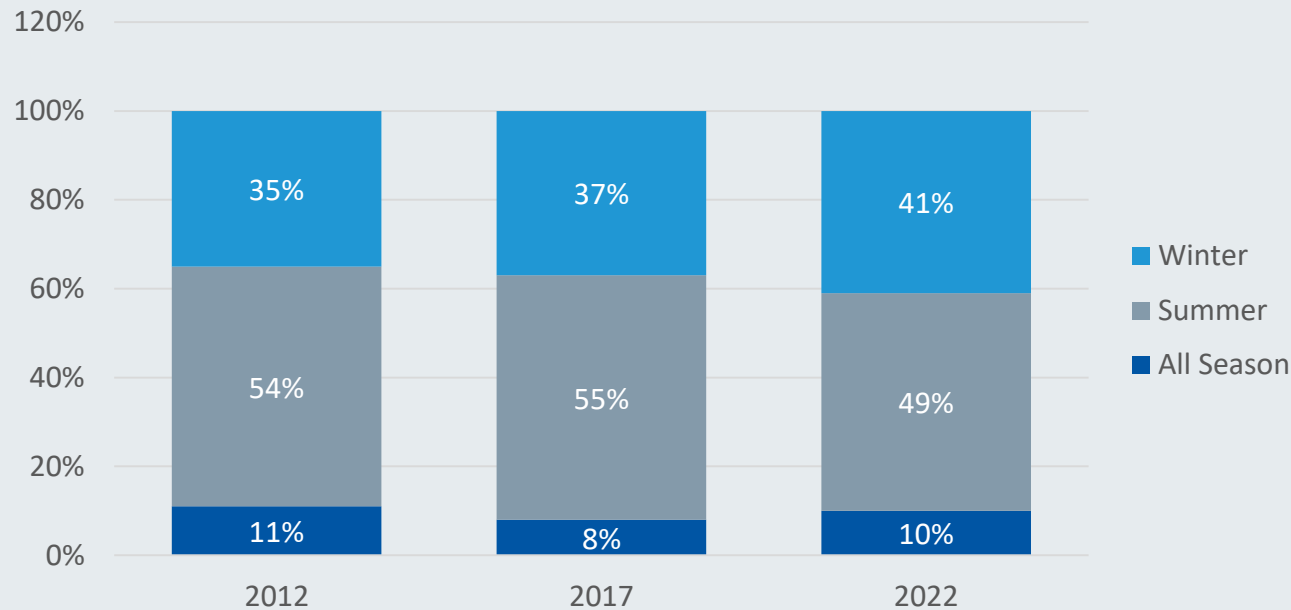
**Passenger cars tires account for the bulk of sales in Europe, while SUV/4x4 tire segment grows the fastest  
Trend towards higher RIM sizes (>17")**

Source: Goodyear Estimates.  
Countries: Europe (incl. Turkey, excluding Russia/CIS).  
\*Compound Annual Growth Rate



# Market insights – SUV/4x4 tire market: seasonal split 2012 - 2022

## SUV/4x4 tire market split by season evolution



**Summer SUV/4x4 biggest segment, SUV/4x4 winter biggest growth 2022 vs 2012 (CAGR\*: +11.7)**

Source: Goodyear Estimates.  
Countries: Europe (incl. Turkey, excluding Russia/CIS).  
\*Compound Annual Growth Rate

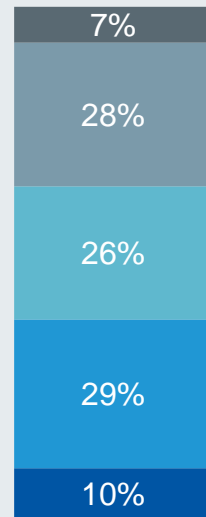




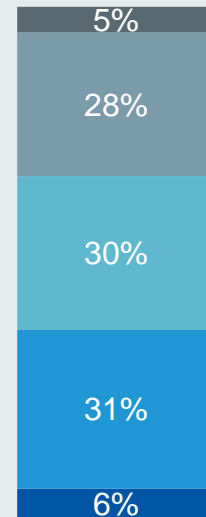
# SUV/4x4 owners - demographics

## Age of car owners

Total Car Owners



SUV



- 61+ y.o.
- 45-60 y.o.
- 35-44 y.o.
- 25-34 y.o.
- 18-24 y.o.

**SUV owners are more represented in the 25-44 age bracket compared to the total of car owners**

Source: Shopper Research 2017 – IPSOS. Study on 7,000 car owners in UK, Germany, France, Italy, Spain, Poland and Russia.  
Note: index versus total car owners



## SUV/4x4 owners - demographics

### Household annual income index

	Total car owners	SUV/4x4 owners
UK	100	121
Germany	100	116
France	100	122
Italy	100	117
Spain	100	117
Poland	100	133
Russia	100	111

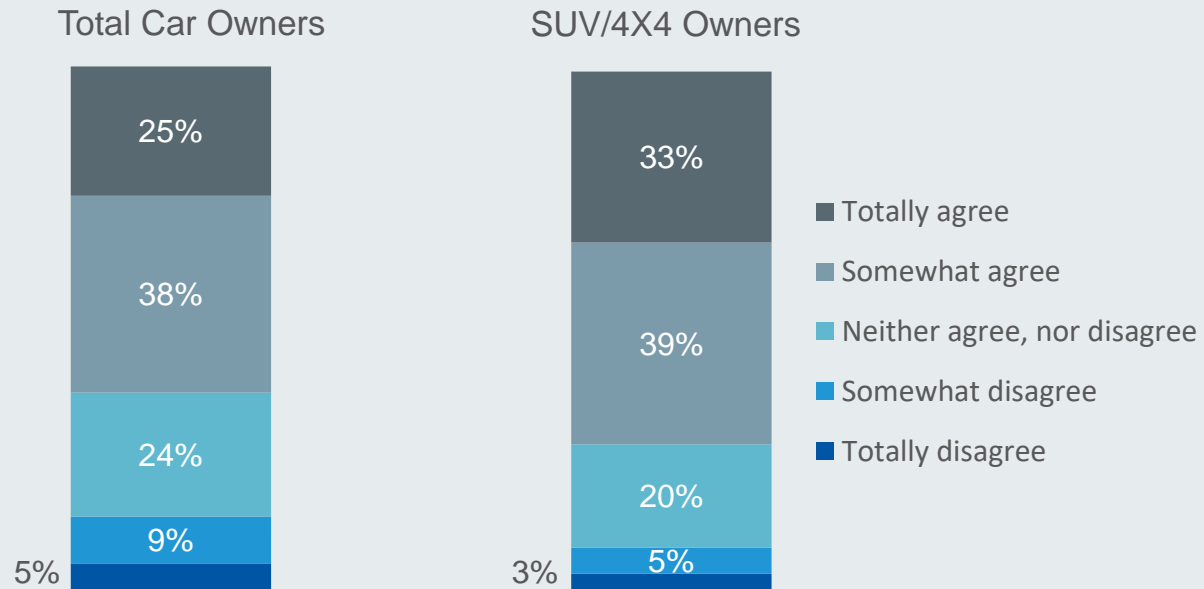
**SUV/4x4 owners tend to have a higher disposable income than the average car owner**



## Importance of safety

“

*My car should be equipped with all possible safety features”*



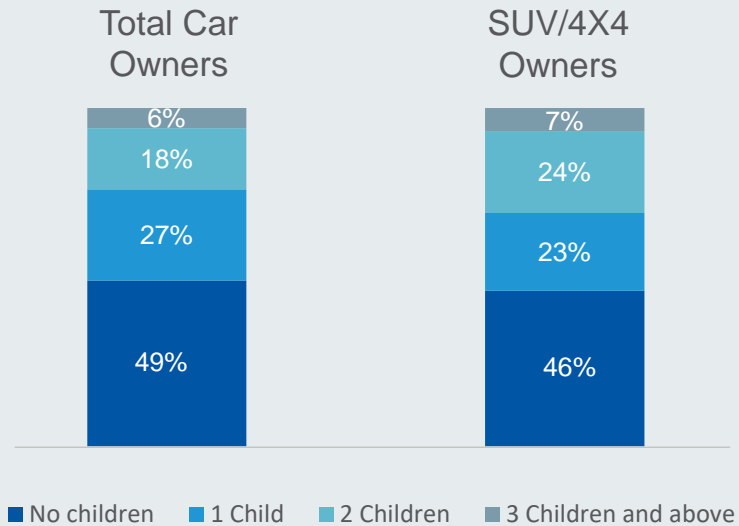
**Safety is one of the main concerns for SUV/4x4 owners and a deciding factor for choosing this type of vehicle**



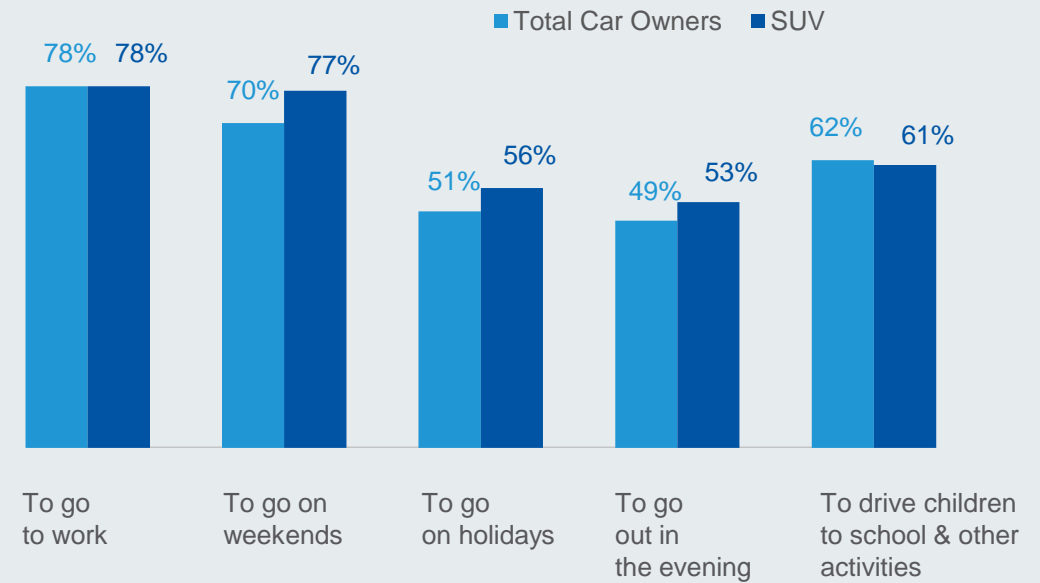


# Importance of space & comfort

## Number of children in household, by vehicle type owner



## Main function of the car



**SUV/4x4 owners tend to have larger families, giving priority to space and comfort**

Source: Shopper Research 2014 – IPSOS. Study on 7,000 car owners in UK, Germany, France, Italy, Spain, Poland and Russia.



# Joachim Meis

Marketing Product Manager

Goodyear Europe, Middle East & Africa



# What consumers want – A car that...

	Total sample (1,001 consumers)	Performance & SUV (256 consumers)	Trust seekers (412 consumers)	Care seekers (506 consumers)
...allows for a short braking distance (wet and dry)	71	71	81	81
...is particularly good on wet roads/has a good wet grip	69	71	79	79
...offers good mileage	68	70	78	77
...is particularly good on high speed braking	68	72	78	80
...offers good value for money	68	68	77	74
...provides good dry handling	67	71	75	76
...provides good driving comfort	65	67	75	76
...is of high quality	64	68	76	77
...allows fuel savings	63	65	74	75
...achieved excellent magazine test results	61	68	70	75

Braking is the number one feature that UHP consumers are looking for in tires, followed by good wet grip and dry handling. Mileage is also important for UHP consumers

Source: TNS UK – Consumer Needs Research 2014  
 Note: Statistically all items in the list above are of significant importance







Meet our latest SUV tire



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## What did we focus on?

### New product in a growing Summer SUV UHP segment

- Meeting the needs of SUV/4x4 owners by offering confident braking and handling through an optimized construction for SUVs
- Improved handling to make an SUV drive like a passenger car






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# GOODYEAR Eagle F1 Asymmetric 3 SUV

## Features & Benefits

Feature	 ActiveBraking Technology	 Grip Booster Technology	 SUV Optimized Construction Technology
Benefit	Shorter braking distances on dry and wet roads*	Excellent grip for braking and handling	Stable handling at higher speeds

\* Compared to the next best tested competitor. Tested by TÜV SÜD Product Service GmbH in October 2017 by order of Goodyear Dunlop. Products tested: Eagle F1 Asymmetric 3 SUV, Bridgestone Dueler H/P Sport; Michelin Latitude Sport 3, Pirelli P Zero Rosso. Tire size: 255/50 R19 107Y; Test car: BMW X5; Test locations: Mireval (F), Papenburg (D), Garching (D); Report No.713117618G accessible under <https://www.goodyear.eu/content/dam/gydu/page-assets/TUV-SUD-Tire-Test-2017-Report-No-713117618G-Goodyear-Eagle-F1-Asym-3-SUV.pdf>



# GOODYEAR Eagle F1 Asymmetric 3 SUV ActiveBraking Technology

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**Eagle F1 Asymmetric 3 SUV**



## Action

The tire's contact patch with the road is increased when braking

## Benefit

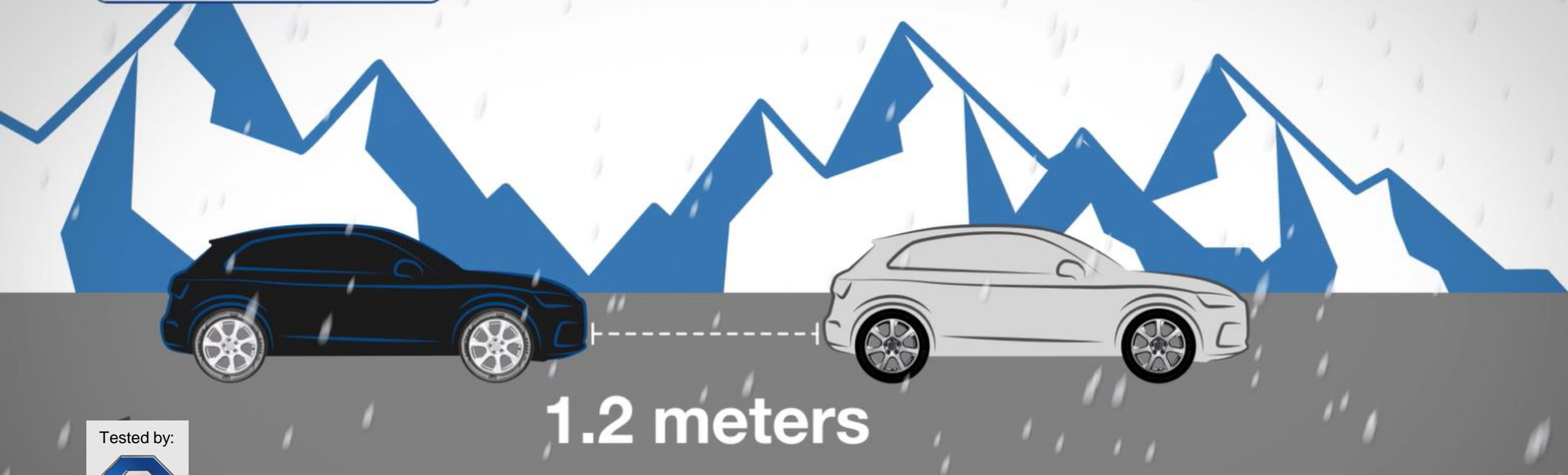
Shorter braking distances on dry and wet roads\*

\* Compared to the next best tested competitor. Tested by TÜV SÜD Product Service GmbH in October 2017 by order of Goodyear Dunlop. Products tested: Eagle F1 Asymmetric 3 SUV, Bridgestone Dueler H/P Sport; Michelin Latitude Sport 3, Pirelli P Zero Rosso. Tire size: 255/50 R19 107Y; Test car: BMW X5; Test locations: Mireval (F), Papenburg (D), Garching (D); Report No.713117618G accessible under <https://www.goodyear.eu/content/dam/gydu/page-assets/TUV-SUD-Tire-Test-2017-Report-No-713117618G-Goodyear-Eagle-F1-Asym-3-SUV.pdf>

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1.2 meters



**Tested by industry expert TÜV SÜD, Goodyear Eagle F1 Asymmetric 3 SUV offers 1.2 meters shorter braking distance on wet and dry roads\***

\* Compared to the next best tested competitor. Tested by TÜV SÜD Product Service GmbH in October 2017 by order of Goodyear Dunlop. Products tested: Eagle F1 Asymmetric 3 SUV, Bridgestone Dueler H/P Sport; Michelin Latitude Sport 3, Pirelli P Zero Rosso. Tire size: 255/50 R19 107Y; Test car: BMW X5; Test locations: Mireval (F), Papenburg (D), Garching (D); Report No.713117618G accessible under <https://www.goodyear.eu/content/dam/gydu/page-assets/TUV-SUD-Tire-Test-2017-Report-No-713117618G-Goodyear-Eagle-F1-Asym-3-SUV.pdf>



# GOODYEAR Eagle F1 Asymmetric 3 SUV Grip Booster Technology



## Action

Adhesive compound to increase stickiness with the road's surface

## Benefit

Excellent grip for braking and handling





# GOODYEAR Eagle F1 Asymmetric 3 SUV

## SUV Optimized Construction



### Action

Delivers a more robust and lightweight tire

### Benefit

Stable handling at higher speeds



# GOODYEAR Eagle F1 Asymmetric 3 SUV

## SUV Optimized Construction



### Features & Benefits

Feature	New cords in the various layers of the construction	UHP Cool Cushion Layer	Optimized cavity and pattern
Benefit	<ul style="list-style-type: none"><li>• Improved handling at higher speeds</li><li>• Improved cornering stiffness</li><li>• Improved tread wear</li></ul>	<ul style="list-style-type: none"><li>• Improved handling</li><li>• Reduced rolling resistance to enhance fuel efficiency</li></ul>	<ul style="list-style-type: none"><li>• Improved tread wear</li></ul>



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# GOODYEAR Eagle F1 Asymmetric 3 SUV

## Part of an award-winning family



**GOODYEAR**  
Eagle F1 Asymmetric 2

**GOODYEAR**  
Eagle F1 Asymmetric SUV

**GOODYEAR**  
Eagle F1 Asymmetric 3



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# GOODYEAR Eagle F1 Asymmetric 3 SUV

## Eagle F1 Asymmetric range fitted by leading car manufacturers



GOODYEAR  
Eagle F1 Asymmetric 2



GOODYEAR  
Eagle F1 Asymmetric SUV



GOODYEAR  
Eagle F1 Asymmetric 3



**NEW**

GOODYEAR  
Eagle F1 Asymmetric 3 SUV



# GOODYEAR Eagle F1 Asymmetric 3 SUV

## OE fitments for Eagle F1 Asymmetric 3 SUV



**Jaguar E Pace**

Start of Production: 2017



**Alfa Romeo Stelvio**

Start of Production: 2017



**Citroën D7 Crossback**

Start of Production: 2018





# GOODYEAR Eagle F1 Asymmetric 3 SUV

## Maximum control for high-end SUV's:

The ultra high performance SUV tire that delivers shorter braking distances for optimal control.

1

Shorter braking distance on both dry & wet roads\*

2

Fitted by leading car manufacturers

3

Excellent magazine test results with passenger car tires



\* Compared to the next best tested competitor. Tested by TÜV SÜD Product Service GmbH in October 2017 by order of Goodyear Dunlop. Products tested: Eagle F1 Asymmetric 3 SUV, Bridgestone Dueler H/P Sport; Michelin Latitude Sport 3, Pirelli P Zero Rosso. Tire size: 255/50 R19 107Y; Test car: BMW X5; Test locations: Mireval (F), Papenburg (D), Garching (D); Report No.713117618G accessible under <https://www.goodyear.eu/content/dam/gydu/page-assets/TUV-SUD-Tire-Test-2017-Report-No-713117618G-Goodyear-Eagle-F1-Asym-3-SUV.pdf>





# Eddy Geerdink

Director Marketing Execution Consumer  
Goodyear Europe, Middle East & Africa



# Workshop overview

## Workshop 1

Dry handling



## Workshop 2

Wet handling



## Workshop 3

Slalom + braking



## Workshop 4

Wet braking





# GOODYEAR Eagle F1 Asymmetric 3 SUV

## Group flow

Thursday 17 May 2018					
<b>Time</b>					
07:00-07:45	Breakfast, Check-out				
07:45-08:30	Transfer to Goodyear test track Mireval	<b>please go into one van with your color group</b>			
	Safety Briefing in workshops				
	<b>WORKSHOPS</b>	<b>DRY HANDLING</b>	<b>WET HANDLING</b>	<b>SLALOM / DRY BRAKING</b>	<b>WET HANDLING</b>
08:30-09:25	Workshops				
09:25-09:30	Transfer				
09:30-10:25	Workshops				
10:25-10:30	Transfer				
10:30-11:25	Workshops				
11:25-11:30	Transfer				
11:30-12:25	Workshops				
12:25-12:30	Transfer				
12:30-13:00	Lunch / Farewell				





#GoodyearEF1A3SUV



**Thank you**



**All information is available on:**

<http://news.goodyear.eu/events/goodyear-eagle-f1-asymmetric-3-suv-event>

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OF INNOVATION**