

AFTERMARKET FAST FORWARD 2012

TABLE OF CONTENTS

	<u>Page</u>
1.0 INTRODUCTION.....	6-8
2.0 EXECUTIVE SUMMARY	9-43
3.0 MARKET ANALYSIS.....	44-108
<u>AFTERMARKET SIZE AND SEGMENTS</u>	<u>44-47</u>
3.01 Aftermarket Size 2006 - 2012	44
3.02 Car and Light Truck Products & Service	45
3.03 Major Vehicle Aftermarket Product Segments.....	46
3.04 Light Vehicle Aftermarket Segment Analysis.....	47
<u>SERVICE MARKET AND OUTLETS.....</u>	<u>48-57</u>
3.05 Service Market Analysis	48
3.06 Service Market Product Volume	48
3.07 Service Market Product Share	49
3.08 Service Market Regional Changes.....	50
3.09 Service Stations and Garages.....	51
3.10 Vehicle Dealers	52
3.11 Repair Specialists.....	53
3.12 Tire Stores	54
3.13 Foreign Specialists.....	55
3.14 Discount Stores/Mass Merchandisers	56
3.15 Auto Parts Stores.....	57

<u>SERVICE BAYS</u>	58-60
3.16 Service Bays.....	58
3.17 Service Bay Population Changes.....	59
3.18 Vehicles Per Service Bay	60
<u>PURCHASED SERVICE</u>	61-63
3.19 Purchased Service Outlet Share.....	61
3.20 Purchased Service Outlet Shift	62
3.21 Independent (Non-OE) Aftermarket	63
<u>DO-IT-YOURSELF MARKET AND OUTLETS</u>	64-73
3.22 Do-It-Yourself Market Analysis.....	64
3.23 Do-It-Yourself Market Product Volume.....	64
3.24 Do-It-Yourself Market Product Share.....	65
3.25 Do-It-Yourself Market Share of Product Growth	66
3.26 Do-It-Yourself Market Regional Volume.....	67
3.27 Retail Auto Parts Stores	68
3.28 Discount Stores/Mass Merchandisers	69
3.29 Jobbers	70
3.30 Dealers	71
3.31 Drugstores/Supermarkets.....	72
3.32 Other Outlets.....	73
<u>DOMESTIC VEHICLES</u>	74-78
3.33 Domestic Vehicles.....	74
3.34 Domestic Vehicles Decline in Product Share.....	75
3.35 Domestic Vehicles Decline in Product Growth Share	76
3.36 Domestic Cars versus Light Trucks	77
3.37 Domestic Vehicle Volume by Geographic Area.....	78
<u>FOREIGN VEHICLES</u>	79-84
3.38 Foreign Vehicles.....	79
3.39 Growing Foreign Vehicle Product Share	80
3.40 Foreign Light Vehicles Expand Share of Product Growth.....	81
3.41 Foreign Vehicle Growth: Cars versus Light Trucks.....	82
3.42 Foreign Vehicle Regional Volume	83
3.43 Foreign and Domestic Vehicle Regional Growth	84

<u>VEHICLE POPULATION</u>	85-88
3.44 Light Vehicle Population Changes.....	85
3.45 Cars and Light Trucks in Operation.....	86
3.46 Domestic and Foreign Vehicles in Operation	87
3.47 Changing Light Vehicle Mix: 2006 - 2012	88
<u>VEHICLE AGE</u>	89-92
3.48 Light Vehicle Average Age	89
3.49 Car and Light Truck Average Age Growth: 2006 - 2012.....	90
3.50 Domestic and Foreign Vehicle Average Age.....	91
3.51 Average Age Among Major Vehicle Segments	92
<u>VEHICLE MILEAGE</u>	93-94
3.52 Annual Vehicle Mileage.....	93
3.53 Annual Mileage Per Average Light Vehicle.....	94
<u>DISTRIBUTION CHANNELS</u>	95-102
3.54 Distribution Channel Share.....	95
3.55 Distribution Channel Share Change: 2006 - 2012	96
3.56 Distribution Channel Product Volume and Growth Share	97
3.57 Traditional Channel.....	98
3.58 Integrated Channel.....	99
3.59 OE Channel.....	100
3.60 Specialized Distribution.....	101
3.61 Import Channel	102
<u>AUTO PARTS STORES AND WAREHOUSES</u>	103-108
3.62 Jobber Store Population	103
3.63 Jobber Stores by Region	104
3.64 Jobber Sales Growth	105
3.65 Auto Parts Store Population.....	106
3.66 Traditional Warehouse Distributors	107
3.67 Commercial Sales by Retail Auto Parts Stores.....	108
4.0 PRODUCT ANALYSIS	109-268

- | | |
|-----------------------------|-------------------------------|
| • Accessories - Appearance | • Hitches and Towing Products |
| • Accessories - Handling | • Ignition Parts |
| • Accessories - Performance | • Ignition Wire Sets |

- Air Conditioning Parts
- Alternators
- Antifreeze
- Ball and Roller Bearings
- Batteries
- Belts and Hoses
- Brake ABS Parts
- Brake Calipers - Loaded
- Brake Calipers - Unloaded
- Brake Drums
- Brake Hardware
- Brake Hydraulic Parts - Other
- Brake Master Cylinders
- Brake Pads
- Brake Rotors
- Brake Shoes
- Camshafts
- Caps - Gas, Oil and Radiator
- Carburetors
- Chassis Parts
- Chemicals - Appearance
- Chemicals - Maintenance/Service
- Clutches and Transmission Parts
- Constant Velocity Driveshafts
- Constant Velocity Joints
- Emission Control Parts
- Engine Bearings
- Engine Control Modules
- Equipment
- Exhaust System Parts
- Filters - Oil, Air, Cabin and Fuel
- Front Wheel Drive Parts
- Fuel Injection Parts
- Fuel Pumps
- Gas and Oil Additives
- Gaskets
- Heating Parts
- Instruments and Guages
- Lights and Lamps
- Mass Airflow Sensors
- Motor and Transmission Mounts
- Motor Oil
- Oil Pumps
- Oil Seals
- Oxygen Sensors
- Pistons
- Piston Rings
- Power Steering Hoses and Pumps
- Rack and Pinion Steering Units
- Radiators
- Relays
- Security and Detection Products
- Sensors - Other
- Shock Absorbers
- Spark Plugs
- Starters
- Struts
- Thermostats
- Timing Components
- Tools
- Trailer Electrical Connectors
- Transmission Filters and Kits
- Universal Joints
- Valves - Engine
- Water Pumps
- Wiper Blades, Arms, and Motors
- Wire and Cable
- Accessories - Other
- Chemicals - Other
- Electrical Products - Other
- Engine Parts - Other
- Fuel System Products - Other
- Steering and Suspension Parts - Other
- All Other Products

5.0 TRENDS AND CONCLUSIONS 269-316

6.0 GLOSSARY 317-320