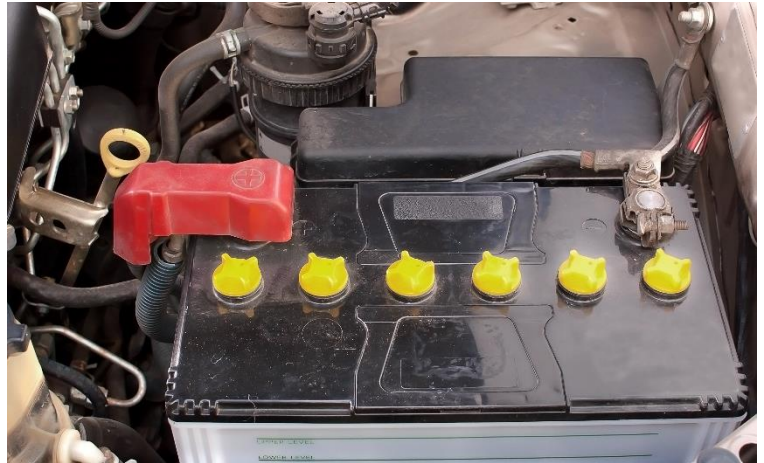


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Automotive Aftermarket: North America

November 2017



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About This Report

Scope & Method

This report forecasts North American demand for automotive aftermarket components in nominal US dollars at the manufacturer level to 2021. Total demand is segmented by product in terms of:

- mechanical components
- electronic and electrical components
- exterior and structural components

In the scope of this report, “automotive” denotes light vehicles (i.e., passenger cars, light trucks, and vans). The aftermarket represents parts and components installed after the vehicle has left the factory. However, remanufactured and rebuilt components are included in the scope of this report. For the purposes of this report, original equipment manufacturer (OEM) replacement parts, original equipment service (OES) parts, and aftermarket parts are all included in the automotive aftermarket, as long as these parts are utilized to repair or upgrade light vehicles in use. Furthermore, sales are attributed to the final purchaser, rather than the installer.

Excluded from the scope of this report are: chemical products (e.g., motor oil, windshield washer fluid, etc.); tires; trim and other decorative items; and add-on vehicle accessories, such as car seats, trailer hitches, and special body panels.

Total demand is also segmented by performer as follows:

- professional
- consumer/DIY (do-it-yourself)

To illustrate historical trends, total demand and the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various

About This Report

topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Automotive Aftermarket: North America (FF85010) is based on *North America Automotive Aftermarket*, [a comprehensive industry study](#) published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | Industry Codes Related to the Automotive Component Aftermarket

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
326220	Rubber & Plastics Hoses & Belting Mfg	3052	Rubber & Plastics Hose & Beltings
332510	Hardware Mfg	3292	Asbestos Products
334310	Audio & Video Equipment Mfg	3429	Hardware, NEC
335911	Storage Battery Mfg	3465	Automotive Stampings
336311	Carburetor, Piston, Piston Ring, & Valve Mfg	3499	Fabricated Metal Products, NEC
336321	Vehicular Lighting Equipment Mfg	3592	Carburetors, Pistons, Rings, Valves
336330	Motor Vehicle Steering & Suspension Components (except Spring) Mfg	3599	Industrial Machinery, NEC
336340	Motor Vehicle Brake System Mfg	3647	Vehicular Lighting Equipment
336350	Motor Vehicle Transmission & Power Train Parts Mfg	3651	Household Audio & Video Equipment
336360	Motor Vehicle Seating & Interior Trim Mfg	3691	Storage Batteries
336370	Motor Vehicle Metal Stamping	3714	Motor Vehicle Parts & Accessories
336391	Motor Vehicle Air-Conditioning Mfg		
336399	All Other Motor Vehicle Parts Mfg		

Source: US Census Bureau

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Resources

The Freedonia Group

North America Automotive Aftermarket, November 2017

North American Automotive Aftermarket Competitor Analysis, November 2017

Freedonia Industry Studies

Automotive Aftermarket for Electronic Components in North America, September 2017

Automotive Aftermarket for Batteries & Ignition System Components in North America, July 2017

Automotive Aftermarket for Filters in North America, June 2017

Automotive Aftermarket for Brake Parts in North America, April 2017

Automotive Aftermarket for Powertrain Components in North America, March 2017

Global Internal Combustion Engine & Related Filters Market, January 2017

Gasket & Seal Market in the US, December 2016

Rechargeable (Secondary) Batteries, September 2016

World Bearings, August 2016

Freedonia Focus Reports

Automotive Repair & Maintenance Services: United States

Hoses & Belts: United States

Medium- & Heavy-Duty Trucks & Buses: United States

Metal Stampings: United States

Motor Vehicles: United States

Motorcycles: United States

Tires: United States

Transport Equipment: United States

World Bearings

World Gaskets & Seals

World Internal Combustion Engine Filters

Freedonia Custom Research

Trade Publications

Aftermarket Business World

Aftermarket News

AutoInc.

Automotive Engineering International

Automotive News

Tire Business

Ward's AutoWorld

Agencies & Associations

AutoCare Association
Automotive Aftermarket Industry Association
Automotive Aftermarket Suppliers Association
Automotive Industries Association of Canada
Automotive Service Association
Canadian Battery Association
Eurostat
Instituto Nacional de Estadística, Geografía e Informática
International Monetary Fund
Motor & Equipment Manufacturers Association
National Automobile Dealers Association
National Highway Traffic Safety Administration
Organisation for Economic Co-operation and Development
Specialty Equipment Market Association
Statistics Canada
United States Census Bureau
United States Environmental Protection Agency
United States International Trade Commission
World Bank