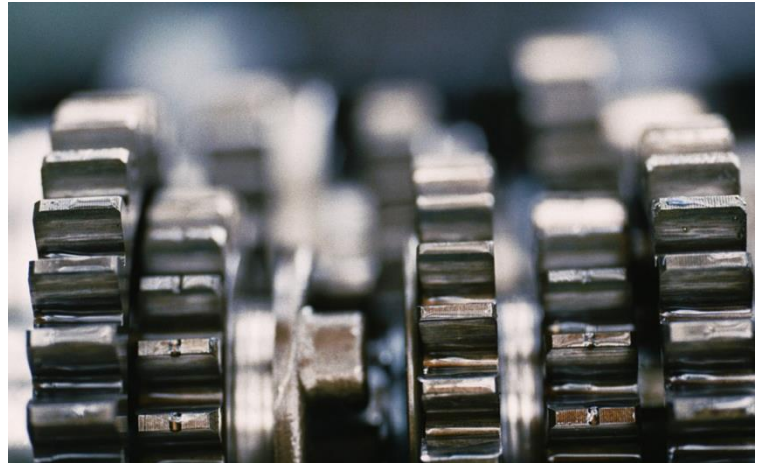
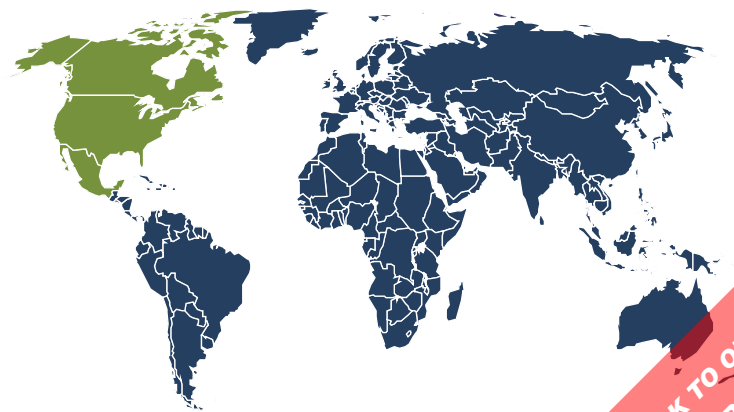


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Automotive Powertrain Aftermarket: North America

March 2017



Highlights

Market Environment

Historical Trends | Key Economic Indicators | Technology and Materials
Vehicle Trends | Legal and Regulatory Factors

Segmentation and Forecasts

Products | Performers

Industry Structure

Industry Characteristics | Market Share

Resources

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ABOUT THIS REPORT

Scope & Method

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

- transmissions and parts
- engines and parts
- drivetrain components.

This report analyzes the North American aftermarket for automotive engine, transmission, and drivetrain components. Here “automotive” denotes light vehicles (ie, passenger cars, light trucks, and vans). The aftermarket represents parts and components installed after the vehicle has left the factory. In this report, North America comprises the US, Canada, and Mexico. For the purposes of this report, original equipment manufacturer (OEM) replacement parts, OEM parts, and aftermarket parts (as well as used parts recycled from scrapped vehicles and rebuilt or refurbished parts) are all included in the automotive aftermarket, as long as these parts are utilized to repair or upgrade light vehicles in use. Furthermore, the sales are included under the source where the part is installed on the vehicle. Thus, an OEM replacement clutch assembly that is sold by the automaker to a dealer then resold to a local garage for installation would be included under garages and service stations, with the automotive dealer in this case serving as a distributor of the part.

Total demand is also segmented by performer as follows:

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

To illustrate historical trends, total demand is provided in an annual series from 2006 to 2016; 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.

ABOUT THIS REPORT

Key macroeconomic indicators are also provided with quantified trends. Other various 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 Powertrain Aftermarket: North America (FF85038) is based on [Automotive Aftermarket for Powertrain Components in North America](#), 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 Automotive Aftermarket Powertrain Components

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
326220	Rubber and Plastics Hoses and Belting Mfg	3052	Rubber and Plastics Hose and Belting
336311	Carburetor, Piston, Piston Ring, and Valve Mfg	3592	Carburetors, Pistons, Piston Rings, and Valves
336312	Gasoline Engine and Engine Parts Mfg	3714	Motor Vehicle Parts and Accessories
336350	Motor Vehicle Transmission and Power Train Parts Mfg		

Source: US Census Bureau

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Resources

The Freedonia Group

Freedonia Industry Studies

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

World Gaskets & Seals, December 2015

World Gears, October 2015

Industrial Rubber Products, July 2015

World Batteries, July 2015

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Bearings: United States

Gaskets & Seals: United States

Hoses & Belts: United States

Internal Combustion Engine Filters: United States

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

Metal Stampings: United States

Motorcycles: United States

Motor Vehicles: 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'sAuto World

Agencies & Associations

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