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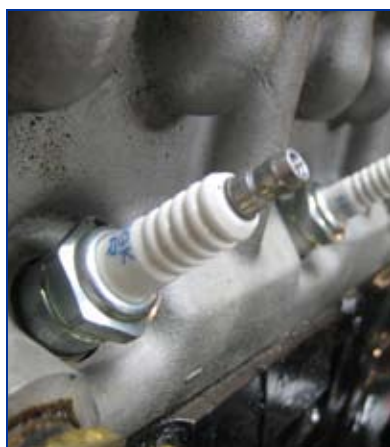
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Automotive Aftermarket in North America

Industry Study with Forecasts for **2014 & 2019**

Study #2606 | March 2010 | \$4800 | 397 pages

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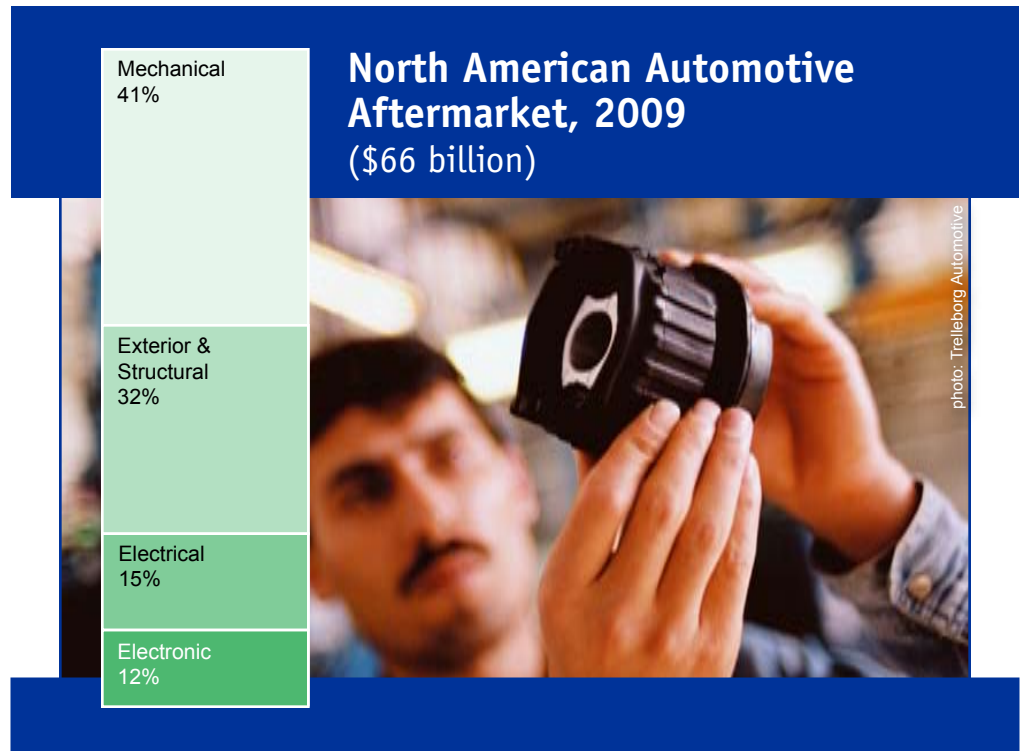
Gains will be driven largely by the growth and aging of the North American light vehicle fleet, including an increasing share of vehicles reaching prime aftermarket service age of five to ten years.

North American aftermarket to increase 2.9% annually through 2014

The aftermarket for light vehicle components in North America will increase 2.9 percent annually to \$76.1 billion in 2014. Gains will be driven largely by the growth and aging of the North American light vehicle fleet, including an increasing share of vehicles reaching prime aftermarket service age, which is five to ten years for many parts and components. In addition, the average miles traveled per vehicle is expected to rebound from low 2009 levels as the region's economy improves.

Electronics to see most rapid gains in demand

The largest product category in the aftermarket will continue to be mechanical products, which include engine hard parts, chassis, drivetrain and suspension parts and components. However, growth will be limited by the improved quality of these already highly durable products. Electronic parts and components are expected to see the most rapid gains among the major product segments. Demand for electronic products -- especially controls, modules and sensors -- will benefit from the ongoing rise in electronic content of the typical light vehicle and the continued introduction of advanced vehicle systems that rely on these components.



Demand in the structural and exterior segment will increase 2.8 percent annually through 2014, moderating from a strong 2004 to 2009 performance. Growth will be primarily driven by rising demand for higher value products -- particularly performance tires and advanced glass products, such as solar control windows and electrochromic mirrors. Still, the improved wear characteristics of tires, and moderating raw material prices, will restrain value gains. The electrical parts segment will experience modest growth, restrained by the long service lives of many of these components, competition from electronic products and expected declines in prices for raw materials (particularly lead for batteries).

Mexican aftermarket to grow the fastest

The Mexican automotive aftermarket will post the fastest growth among the three nations in North America, rising 4.4 percent annually through 2014. Growth will be spurred by the rising affluence of Mexican consumers who increasingly demand more complex, fully-featured vehicles and by Mexico's rapidly expanding vehicle park. However, while the US market will record the slowest gains in percentage terms, growing 2.7 percent per year through 2014, the additional US market value in aftermarket parts demand will represent the vast majority of total increases in North America for the period.

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MECHANICAL PRODUCT AFTERMARKET

Transmissions & Parts

Demand for transmissions and parts in the aftermarket in North America will increase to \$4 billion in 2019. Several factors will support this growth, including rising component costs and repair costs as these vehicles shift from manual to electronic control systems. This shift will boost the cost of transmission parts. In addition, the increasing number of miles driven will support gains. Furthermore, the growing number of continuously variable transmissions (CVTs) which utilize a shaft and pulleys in place of gears should support aftermarket sales since these systems are somewhat less robust than traditional gear-based transmissions, despite significant progress by the makers of CVTs.

While incredibly complex and precisely manufactured, transmissions are essentially gear assemblies. A transmission receives an input from the engine, changes the speed (and sometimes the direction) of the input, and transmits the power to the drive axle. These vital components allow a motor vehicle's engine to operate at its optimal speed while driving the wheels at the desired speed, making the vehicle more efficient. The ability to vary gear ratios quickly and efficiently contributes to the complexity of transmission designs. Light vehicle transmissions are either automatic or manual. With manual transmissions, which are also known as standard transmissions, parts tend to be replaced more often than the entire component. By contrast, automatic transmissions are more complex and costly to repair, and thus it is more common to replace or rebuild the entire transmission when failure occurs fairly infrequent.

Several factors have led to the increased value of transmission parts per vehicle basis over the last decade. Automatic transmissions

**SAMPLE
 TEXT**

TABLE IV-6

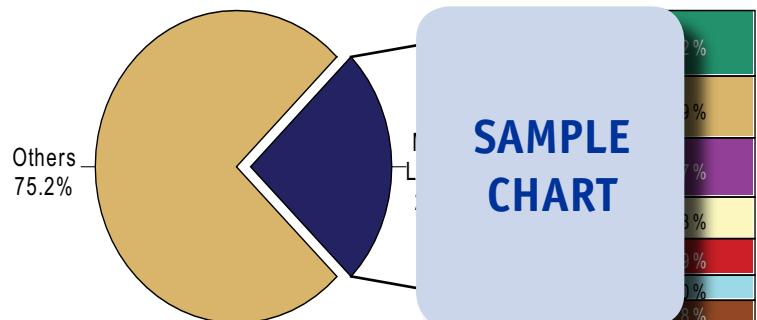
STEERING & SUSPENSION COMPONENT
 AFTERMARKET IN NORTH AMERICA
 (million dollars)

Item	1999	2004	2009	2014	2019
Total Steering & Suspension Component Aftermarket	170	200	230	260	290
Steering & Suspension Aftermarket	100	120	140	160	180
Shock Absorbers & Struts	20	25	30	35	40
Tie Rod Ends	10	12	14	16	18
Ball Joints	10	12	14	16	18
Power Steering Pumps	5	6	7	8	9
Power Steering Hose Assemblies	5	6	7	8	9
Other	5	6	7	8	9
% steering & suspension Mechanical Product Aftermarket	20	20	20	20	20

**SAMPLE
 TABLE**

CHART IX-1

NORTH AMERICA AUTOMOTIVE AFTERMARKET MARKET SHARE
 BY COMPANY, 2009
 (\$66.0 billion)



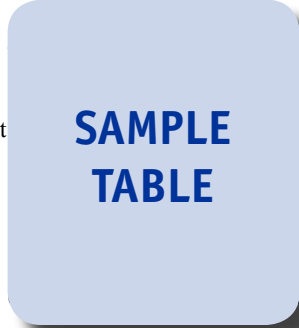
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 CHART**

Sample Profile, Table & Forecast

TABLE VI-4

**AUTOMOTIVE LIGHTING EQUIPMENT AFTERMARKET
 IN NORTH AMERICA
 (million dollars)**

Item	1999	2004	2009	2014	2019
Total Automotive Lighting Sales					20
% aftermarket					1
Automotive Lighting Eqpt Aftermarket					20
Headlamps & Bulbs					5
Parking, Tail & Interior					16
Spot, Fog & Auxiliary					9
% lighting					4
Electrical Product Aftermarket					00



COMPANY PROFILES

East Penn Manufacturing Company Incorporated
 DeKa Road
 Lyon Station, PA 19536
 610-682-6361
 http://www.ea

Annual Sales:
 Employment:

Key Activities

East Penn is a manufacturer of calcium batteries, battery cables, and automotive, commercial, marine, industrial and specialty markets. In addition to battery production, the Company draws nonferrous wire from purchased rod to produce a variety of wire and cable products. These products are mainly sold to the automotive aftermarket and are distributed through East Penn's warehouses in the US and Canada.

The Company is active in the automotive aftermarket through the production of automotive batteries and battery accessories. East Penn's DEKA automotive lead-acid batteries are intended for passenger cars, light trucks and vans. Among the products in the DEKA line are DEKA EN EXACT FIT flooded and absorbed glass mat (AGM) batteries, DEKA ULTIMATE batteries with ADVANCED GENERATION silver calcium alloy and DEKA INTIMIDATOR AGM batteries. East Penn also manufactures such battery accessories as terminals, terminal protectors, booster cables and battery cables.

The Company produces batteries and other products at a plant in Lyon Station, Pennsylvania that occupies more than two million square

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"Aftermarket demand for automotive headlamps and bulbs will increase 2.0 percent per annum to \$470 million in 2014. The rising number of vehicles in use, combined with the increased penetration of more advanced, and expensive, lighting products such as smart headlamps and HID systems, will support increases. However, because many of these new systems are more durable than older products, demand growth will be restrained to some degree. Furthermore, ..."
 --Section VI, pg. 173

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OTHER STUDIES

Automotive Aftermarket in China

The automotive aftermarket in China will grow 18.3% yearly through 2014, driven by the country's expanding and aging stock of light vehicles. Mechanical products will remain the most common types, while electronics grow the fastest. Low-speed vehicles will continue to be a key aftermarket in rural areas. This study analyzes the 71 billion yuan automotive aftermarket in China, with forecasts for 2014 and 2019 by product and service performer. It also evaluates company market share and profiles industry participants.

#2621 March 2010..... \$5300

World Rubber & Tire

Global rubber consumption will increase 4.1% yearly through 2013. The Asia/Pacific region will remain the largest and fastest-growing market. Non-tire rubber demand will outpace tire rubber. Tire rubber will continue to benefit from strong growth in Asia, despite a decline in rubber usage per tire. This study analyzes the 22 million metric ton world rubber industry, with forecasts for 2013 and 2018 by type, market, world region and for 30 countries. It also evaluates company market share and profiles industry players.

#2575 January 2010 \$5900

World Motorcycles

(including Electric Bicycles & Mopeds)

Global motorcycle demand will grow 7.6% per year through 2013, driven by rising living standards in developing areas that make motorcycles more affordable to use. ICE motorcycles will remain dominant while electric types lead gains. Sales in the Africa/Mideast and Asia/Pacific markets will grow the fastest. This study analyzes the 79.2 million unit world motorcycle industry, with forecasts for 2013 and 2018 by product, world region and for 21 countries. It also evaluates market share and profiles industry players.

#2537 August 2009 \$5700

World Light-Duty Green Vehicles

Global "green" vehicle demand will grow rapidly through 2013, driven by government subsidies, technology breakthroughs and erratic oil prices. North America will remain the largest and fastest growing market. Conventional hybrid-electric vehicles will surpass natural gas types to become the most commonly sold. This study analyzes the 1.8 million unit world green vehicle industry, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates market share and profiles industry players.

#2510 August 2009 \$5700

Medium- & Heavy-Duty Truck Aftermarket

The US aftermarket for medium- and heavy-duty (MD/HD) truck parts will grow 3.8% annually through 2013. Exterior and structural components such as tires will remain the largest segment, while electrical and electronic components see the fastest gains. Outsourced service providers will continue to dominate, led by tire dealers. This study analyzes the \$14.2 billion US MD/HD aftermarket, with forecasts for 2013 and 2018 by product and service performer. It also evaluates market share and profiles industry players.

#2481 April 2009 \$4600

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