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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

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Automotive Aftermarket in North America

Industry Study with Forecasts for **2016 & 2021**

Study #2927 | August 2012 | \$5100 | 410 pages

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Table of Contents

EXECUTIVE SUMMARY MARKET ENVIRONMENT

General	4
Macroeconomic Environment	6
United States	8
Canada	10
Mexico	12
Light Vehicle Supply & Demand Dynamics	13
United States	16
Canada	19
Mexico	20
Automotive Industry Trends	22
United States	23
Canada	25
Mexico	26
Aftermarket Forces at Work	28
Vehicle Quality Improvements	32
Vehicle Mileage Trends	33
Average Vehicle Age	35
Accident Trends	37
Pricing Trends	39
Technology & Materials Trends	41
Legal & Regulatory Trends	44
Foreign Trade & International Issues	47
Global Supply & Demand Trends	48
Trends in Foreign Trade	50

AUTOMOTIVE AFTERMARKET BY COUNTRY

General	53
United States	55
Canada	59
Mexico	62

MECHANICAL PRODUCT AFTERMARKET

General	65
Transmissions & Parts	68
Transmissions	72
Parts	74
Engines & Parts	75
Engines, Blocks, & Cylinder Heads	79
Pistons & Rings	81
Valves, Seats, & Related	82
Bearings	84
Camshafts	85
Other	86
Filters	87
Oil Filters	90
Air Intake Filters	92
Fuel Filters	93
Cabin Air Filters	95
Other	96
Brake Parts	97
Shoes, Pads, & Linings	101
Rotors	102
Calipers & Cylinders	103
Drums	104
Anti-Lock Brake System Components	105
Other	106

Steering & Suspension Components	107
Shock Absorbers & Struts	110
Tie Rod Ends	111
Ball Joints	112
Power Steering Pumps	112
Power Steering Hose Assemblies	113
Other	114
Drivetrain Components	115
Axles & Parts	117
Wheels & Hubs	118
Clutch Assemblies	119
Constant Velocity Joints	120
Drive Shafts	121
Universal Joints	122
Other	123
Fuel System Components	123
Fuel Injection Products	125
Fuel Pumps	127
Carburetors & Parts	128
Other	128
Exhaust & Emissions System Components	129
Mufflers	131
Pipes	132
Catalytic Converters	133
Other	135
Cooling System Components	135
Radiators & Parts	137
Water Pump Assemblies	139
Thermostats	140
Other	140
Air Conditioning System Components	141
Compressors	143
Condensers	144
Blower Motors	145
Other	145

EXTERIOR & STRUCTURAL PRODUCT AFTERMARKET

General	147
Tires	149
Wiper Blades	153
Windows & Glass	155
Laminated Safety Glass	157
Tempered Safety Glass	159
Mirrors	159
Solar Control & Other	160
Other	161

ELECTRICAL PRODUCT AFTERMARKET

General	164
Batteries	166
Ignition Systems & Parts	170
Starters	172
Ignition Harnesses, Cables, & Coils	173
Distributors & Parts	174
Other	174
Lighting Equipment	175
Headlamps & Bulbs	177
Parking, Tail, & Interior	178
Spot, Fog, & Auxiliary	179
Charging Equipment	180
Spark Plugs	182
Other	184

ELECTRONIC PRODUCT AFTERMARKET

General	187
Electronic Controls, Modules, & Sensors	190
Engine & Drivetrain	192
Safety	193
Anti-Lock Brakes, Traction, & Stability Control	195
Airbags	196
Tire Pressure	197
Telematics, Navigation, & Instrumentation	198
Comfort & Convenience	199
Emissions Control Sensors	200
Automotive Entertainment	202
Sound Systems	204
Video & Multimedia Systems	205
Security Systems	205
Remote/Wireless	207
Vehicle Recovery Systems	208
Local	209

AUTOMOTIVE AFTERMARKET BY PERFORMER

General	211
Professional	214
Specialists	217
Garages & Service Stations	219
Automobile Dealerships	220
Other	223
Consumer/DIY	225

INDUSTRY STRUCTURE

General	228
Industry Composition	229
Market Share	232
Tires	238
Non-Tire Products	239
Product Development & Manufacturing	240
Marketing	241
Distribution	243
Strategic Partnerships	245
Mergers/Acquisitions/Industry Restructuring	253
Financial Issues & Requirements	260

COMPANY PROFILES

Advance Auto Parts	262
Affinia Group	264
Aisin Seiki	267
Autoparts Holdings	271
AutoZone Incorporated	273
BorgWarner Incorporated	274
Bosch (Robert) GmbH	279
Bridgestone Corporation	284
Canadian Tire	287
Chrysler Group	289
Continental AG	290
Cooper Tire & Rubber	297
Cooper-Standard Holdings	299
Dana Holding	302
Delphi Automotive	305
DENSO Corporation	309
East Penn Manufacturing	313
Eaton Corporation	314
Exide Technologies	315

(continued on following page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

Federal-Mogul Corporation.....	318
Ford Motor Company.....	322
Fuyao Glass Industry Group.....	325
General Motors.....	326
Genuine Parts.....	329
GKN plc.....	331
Goodyear Tire & Rubber.....	334
Guardian Industries.....	337
Honeywell International.....	340
Johnson Controls.....	343
JVC KENWOOD.....	346
Meritor Incorporated.....	348
Michelin Group.....	349
Nippon Sheet Glass.....	352
Pep Boys - Manny, Moe & Jack.....	354
Pioneer Corporation.....	357
Pittsburgh Glass Works.....	358
Siemens AG.....	360
Sony Corporation.....	363
Standard Motor Products.....	365
Tenneco Incorporated.....	368
Tomkins Limited.....	370
Trico Products.....	373
TRW Automotive.....	374
UCI Holdings Limited.....	378
Valeo SA.....	382
Veyance Technologies.....	386
Visteon Corporation.....	387
Additional Companies in the North American Automotive Aftermarket.....	391

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 North America: Macroeconomic Environment.....	8
2 United States: Macroeconomic Environment.....	10
3 Canada: Macroeconomic Environment.....	11
4 Mexico: Macroeconomic Environment.....	13
5 North America: Light Vehicle Overview.....	16
6 United States: Light Vehicle Overview.....	19
7 Canada: Light Vehicle Overview.....	20
8 Mexico: Light Vehicle Overview.....	21
Cht United States: Light Vehicle Production by Company, 2011.....	25
Cht Canada: Light Vehicle Production by Company, 2011.....	26
Cht Mexico: Light Vehicle Production by Company, 2011.....	28
Cht Porter's Five Forces Model for the North American Automotive Parts Aftermarket.....	32
Cht North America: Light Vehicle Miles Traveled, 2001-2011.....	34

Cht North America: Average Light Vehicle Miles Traveled, 2001-2011.....	35
Cht North America: Average Light Vehicle Age, 2001-2011.....	36
Cht North America: Light Vehicles Involved in Accidents, 2001-2011.....	37
Cht North America: Light Vehicles Involved in Accidents per Thousand Vehicles in Use, 2001-2011.....	38
9 World Light Vehicle Aftermarket by Region.....	50

AUTOMOTIVE AFTERMARKET BY COUNTRY

1 North America: Automotive Aftermarket by Product & Country.....	55
2 Automotive Aftermarket in the United States by Product.....	59
3 Automotive Aftermarket in Canada by Product.....	61
4 Automotive Aftermarket in Mexico by Product.....	64

MECHANICAL PRODUCT AFTERMARKET

1 Mechanical Product Aftermarket in North America by Product & Country.....	67
2 Transmission & Part Aftermarket in North America by Product & Country.....	72
3 Engine & Part Aftermarket in North America by Product & Country.....	78
4 Automotive Filter Aftermarket in North America by Product & Country.....	90
5 Brake Part Aftermarket in North America by Product & Country.....	100
6 Steering & Suspension Component Aftermarket in North America by Product & Country.....	109
7 Drivetrain Component Aftermarket in North America by Product & Country ..	117
8 Fuel System Component Aftermarket in North America by Product & Country ..	125
9 Exhaust & Emissions Component Aftermarket in North America by Product & Country.....	131
10 Cooling System Component Aftermarket in North America by Product & Country.....	137
11 Air Conditioning System Component Aftermarket in North America by Product & Country.....	143

EXTERIOR & STRUCTURAL PRODUCT AFTERMARKET

1 Exterior & Structural Product Aftermarket in North America by Product & Country.....	149
2 Automotive Replacement Tire Demand in North America by Country.....	153
3 Automotive Wiper Blade Aftermarket in North America by Country.....	155
4 Automotive Window & Glass Aftermarket in North America by Product & Country.....	157

5 Other Exterior & Structural Product Aftermarket in North America by Country.....	163
--	-----

ELECTRICAL PRODUCT AFTERMARKET

1 Electrical Product Aftermarket in North America by Product & Country.....	166
2 Automotive Battery Aftermarket in North America by Product & Country.....	170
3 Ignition System & Part Aftermarket in North America by Product & Country ..	172
4 Automotive Lighting Equipment Aftermarket in North America by Product & Country.....	177
5 Automotive Charging Equipment Aftermarket in North America by Country.....	182
6 Spark Plug Aftermarket in North America by Country.....	184
7 Other Automotive Electrical Product Aftermarket in North America by Country.....	186

ELECTRONIC PRODUCT AFTERMARKET

1 Electronic Product Aftermarket in North America by Product & Country ..	190
2 Electronic Control, Module, & Sensor Aftermarket in North America by Product & Country.....	192
3 Automotive Entertainment Aftermarket in North America by Product & Country.....	204
4 Electronic Security System Aftermarket in North America by Product & Country ..	207

AUTOMOTIVE AFTERMARKET BY PERFORMER

1 Automotive Aftermarket in North America by Performer.....	214
2 Professional Automotive Aftermarket in North America by Performer.....	216
3 Specialist Automotive Aftermarket in North America.....	218
4 Garage & Service Station Automotive Aftermarket in North America.....	220
5 Automobile Dealership Automotive Aftermarket in North America.....	223
6 Other Professional Provider Automotive Aftermarket in North America.....	225
7 Consumer/DIY Automotive Aftermarket in North America.....	227

INDUSTRY STRUCTURE

1 North America: Automotive Aftermarket Sales by Company, 2011.....	231
Cht North America: Automotive Aftermarket Market Share, 2011.....	234
Cht North America: Automotive Tire Aftermarket Market Share, 2011.....	238
Cht North America: Automotive Non-Tire Product Aftermarket Market Share, 2011.....	239
2 Selected Cooperative Agreements.....	248
3 Selected Acquisitions & Divestitures.....	256

Gains will be fueled by an expansion in size and increasing age of the light vehicle fleet, which includes more vehicles in prime aftermarket service age: 5 to 10 years for many components.

Demand to rise 3.2% annually through 2016

The North American light vehicle aftermarket is projected to rise 3.2 percent annually to \$85.5 billion in 2016. Gains will be fueled by an expansion in size and increasing age of the North American light vehicle fleet, which includes a growing number of vehicles in prime aftermarket service age: 5 to 10 years for many components. Additionally, as the regional economy improves and unemployment rates fall, average miles driven per vehicle are expected to climb along with travel to and from work. Continuing improvements in vehicle component durability will prevent aftermarket demand from rising more rapidly, as will increased monitoring of vehicle systems by onboard electronics.

Mexican aftermarket to grow the fastest

Among the three North American markets, the Mexican automotive aftermarket will post the fastest advances, averaging 4.8 percent per annum through 2016. Aftermarket sales will be bolstered by Mexico's rapidly expanding vehicle park and the country's rising affluence, which will lead to greater demand for more expensive, fully-featured vehicles and associated aftermarket products. While the US will record the slowest gains, averaging 3.0 percent per year through 2016, the \$10.0 billion increase in aftermarket demand will represent four-fifths of the region's total sales growth from 2011 to 2016.

Automotive Aftermarket in North America by Product, 2016 (\$85.5 billion)



Best opportunities to be in electronic and exterior and structural products

The fastest growth among the major aftermarket product segments will be registered by electronic products. Suppliers of items such as controls, modules, and sensors will be the beneficiaries of the further development of advanced vehicle systems and the increasing amount of electronic content found in light vehicles. The second fastest growing aftermarket segment will be exterior and structural products (the vast majority of which consists of replacement tires). Gains will be bolstered by increased demand for higher priced items like performance tires and

advanced glass products, including solar control windows and electrochromic mirrors. As a result, demand for exterior and structural products is expected to surpass that for mechanical components in 2016, making it the largest single aftermarket segment.

Sales of electrical parts are expected to climb at a somewhat slower pace, limited by the long useful life of many products in this segment and stabilizing raw material prices, which will reduce inflationary pressures and market increases in dollar terms. Mechanical products will be the slowest growing aftermarket segment. Gains will be tempered by the rising quality of these already highly durable components.

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Sample Text, Table & Chart

MECHANICAL PRODUCT AFTERMARKET

Transmissions & Parts

Aftermarket sales for light vehicle transmissions and parts in North America are forecast to increase to \$1.5 billion in 2016. This increase will be driven by the growing number of transmissions in new vehicles, from manual to automatic/hydraulic to electronic controlled automatic transmissions, which will lead to a greater demand for parts required. The growing number of vehicles in use will also lead to an increase in average miles driven will also lead to an increase in the rising number of continuously variable transmissions (CVTs), electric variable or power sharing transmissions (PSTs) in use in the aftermarket demand because these systems are somewhat less complex than traditional gear-based transmissions. CVTs utilize a system of belts and pulleys in place of gears and only one power input, while PST technology also uses a system of belts and pulleys but has the advantage of being able to apply power from multiple sources. Overall market growth through 2016 will be limited by the increasing durability and reliability of OEM and aftermarket parts.

A transmission is basically a very complex gear assembly. 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, allowing the vehicle's engine to operate at its optimal 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. Manual transmissions (also known as standard transmissions) are simpler than automatic transmissions, allowing components to be replaced individually as part wears, instead of having to replace the entire transmission. By contrast, the complexity of automatic transmissions makes the repair or rebuilding the whole unit the most common course of service when failure occurs, which is fairly infrequent.

**SAMPLE
 TEXT**

TABLE V-1

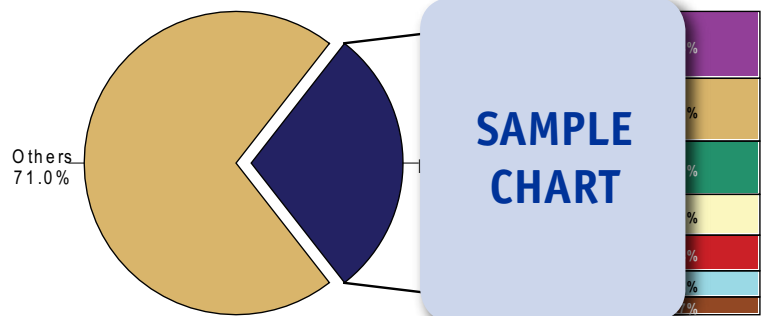
EXTERIOR & STRUCTURAL PRODUCT AFTERMARKET IN NORTH AMERICA BY PRODUCT & COUNTRY (million dollars)

Item	2001	2006	2011	2016	2021
Light Vehicles in Use (mil)					
\$ aftermarket/vehicle					
Exterior/Structural Product Aftermkt					
By Product:					
Tires					
Windshield Wiper Blades					
Windows & Glass					
Other					
By Country:					
United States					
Canada					
Mexico					
% exterior & structural					
North America Automotive Aftermarket					

**SAMPLE
 TABLE**

CHART IX-1

NORTH AMERICA: AUTOMOTIVE AFTERMARKET MARKET SHARE (\$73.0 billion, 2011)



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Trico Products Incorporated

3255 West Hamlin Road
 Rochester Hills, MI 48309
 248-371-1700
<http://www.trico.com>

Annual Sales:
 Employment:

Key Products:
 pumps, motors

**SAMPLE
 PROFILE**

Trico Products is a manufacturer of integrated wiper systems and components. The Company is owned by Kohlberg & Company (Mount Kisco, New York), a private equity firm. Trico Products has seven production operations in the US, Mexico, Argentina, Brazil, the United Kingdom, Australia, and China.

The Company participates in the North American automotive aftermarket through the manufacture of windshield wiper products for aftermarket and original equipment applications. According to Trico Products, it is the leading global producer of windshield wiper blades. Representative products from the Company include wiper blades, arms, linkages, electronics, hoses, washer pumps, motors, and vision modules, as well as complete wiper systems. These products are sold chiefly under the TRICO brand name and include FORCE premium aerodynamic blades, NEOFORM aerodynamic all weather beam blades, SENSE TEFLON (DuPont) edge smooth long-life blades, TEFLON SHIELD hybrid dual technology blades, EXACT FIT pre-assembled replacement wiper blades, FLEX flexible beam blades, and CHILL winter blades.

373

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TABLE VI-3

IGNITION SYSTEM & PART AFTERMARKET IN NORTH AMERICA BY PRODUCT & COUNTRY (million dollars)

Item	2001	2006	2011	2016	2021
Total Automotive Ignition Product Sales % aftermarket					
Ignition System & Part Aftermarket By Product:					
Starters					
Ignition Harnesses/Cables/Coils					
Distributors & Parts					
Other					
By Country:					
United States					
Canada					
Mexico					
% ignition systems & parts Electrical Product Aftermarket					

**SAMPLE
 TABLE**

“Light vehicle aftermarket demand for starters will expand 3.2 percent yearly to \$1.7 billion in 2016, faster than the electrical product category as a whole. Sales will be bolstered by the increasing average age of vehicles in use, a growing vehicle park, and the routine wear these components undergo. Additionally, as the number of hybrid vehicles grows, aftermarket opportunities will present themselves through the further development of starter-generators -- large, powerful motors that are integrated with the drivetrain. However, ...”

--Section VI, pg. 172-3

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OTHER STUDIES

World Motorcycles

The global market for motorcycles, including electrically-powered machines, will grow 7.2 percent annually to 134.5 million units in 2016. China will remain by far the largest national market, followed by India and Indonesia. Sales of e-bikes and e-cycles will grow roughly in line with internal combustion engine (ICE) motorcycle demand. This study analyzes the 95 million unit world motorcycle industry, with forecasts for 2016 and 2021 by type, world region and for 23 countries. The study also evaluates company market share and profiles industry players.

#2972January 2013 \$6300

World Buses

The world market for buses will grow 5.0 percent annually to 632,000 units in 2016. Type C school buses will lead gains, due largely to rapidly expanding use in China. Transit bus demand will rise at the next fastest rate. The Asia/Pacific region will offer the best growth opportunities, with China and India alone accounting for three-fifths of all new bus demand. This study analyzes the 495,000 unit global bus market, with forecasts for 2016 and 2021 by type, world region and for 25 countries. The study also evaluates company market share and profiles industry participants.

#2933 November 2012 \$6100

World Diesel Engines

World demand for diesel engines is projected to grow 6.7 percent per year through 2015 to \$197.5 billion. Growth in the key Asia/Pacific region will be led by China and India, as expanding motor vehicle and off-highway equipment output combines with more fixed investment. Demand in North America and Western Europe will improve. This study analyzes the \$143 billion world diesel engine industry, with forecasts for 2015 and 2020 by application, world region and for 36 countries. The study also evaluates company market share and profiles industry players.

#2864April 2012 \$5900

World OEM Automotive Electronics

Global OEM automotive electronics demand will rise 12.4 percent yearly through 2014. Gains will be driven by economic recovery, regulatory pressures and automobile differentiation efforts. Safety and security, powertrain and emissions, and communication and navigation electronics will lead gains. This study analyzes the \$9.9 billion world OEM automotive electronics industry. It presents historical demand data and forecasts for 2014 and 2019 by product, world region and for 23 countries. It also evaluates company market share and profiles industry players.

#2728 February 2011 \$6100

Motorcycles in China

Demand for motorcycles in China will grow 7.6 percent yearly through 2014. Electric motorcycles will surpass gas types as the largest segment in units. New regulations for electric motorcycles will favor lighter vehicles such as mopeds while discouraging electric scooters and three-wheeled trikes. This study analyzes the 117 billion yuan motorcycle industry in China, with forecasts for 2014 and 2019 by product, market and geographic region. It also evaluates company market share and profiles industry participants.

#2658September 2010..... \$5300

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