Automotive Aftermarket in North America

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

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Industry Study with Forecasts for *2016 & 2021*

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AUTOMOTIVE AFTERMARKET BY PERFORMER

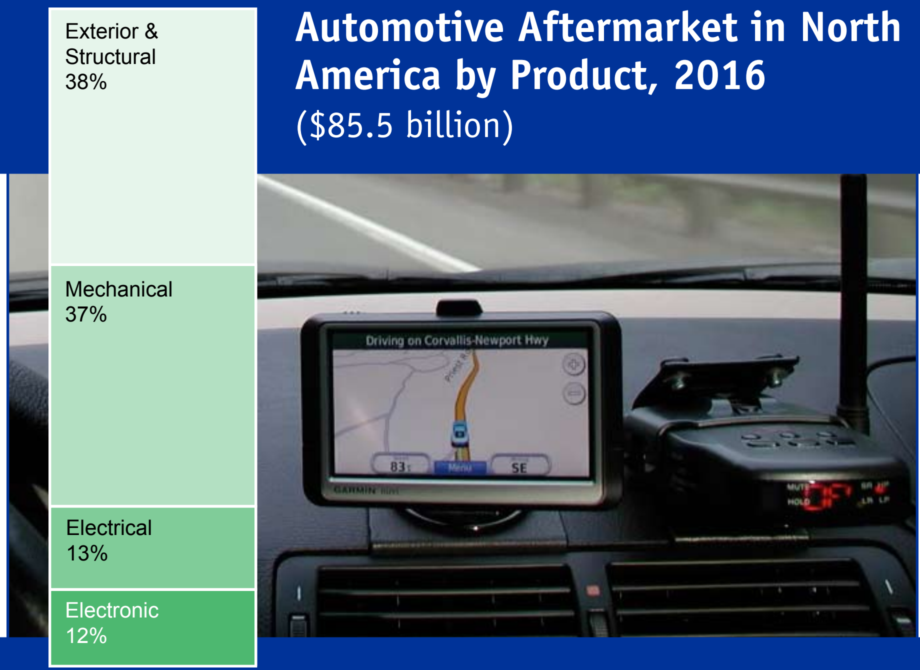
INDUSTRY STRUCTURE

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.

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



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.

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

TABLE V-1

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

SAMPLE TABLE

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 Aftermarke					

MECHANICAL PRODUCT AFTERMARKET

Transmissions & Parts

SAMPLE TEXT

Aftermarket sales for light vehicle transmissions and pa North America are forecast to to $ in 2016. This increase will be mpl transmissions in new vehicles om cal/hydraulic to electronic co atic transmissions, which will lea ser required. The growing numb ew in average miles driven will al es. I the rising number of continuously variable transmissions (CV electric variable or power sharing transmissions (PSTs) in us aftermarket demand because these systems are somewhat les tend to be more complicated than traditional gear-based trans CVTs utilize a system of belts and pulleys in place of gears a 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 replace dividual part wears, instead of having to replace the entire tr By contrast, the complexity of automatic transmissions make or rebuilding the whole unit the most common course of serv failure occurs, which is fairly infrequent.

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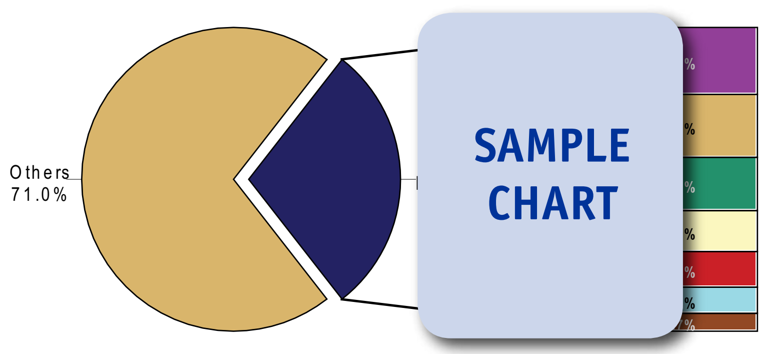
CHART IX-1

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



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Sample Profile, Table & Forecast

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

COMPANY PROFILES

Trico Products Incorporated
3255 West Hamlin Road
Rochester Hills, MI 48309
248-371-1700
http://www.tri

Annual Sales:
Employment:

Key Products: hoses, washer pumps, motors systems

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.

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"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.

#2972 ....January 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.

#2864 ....April 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.

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

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