

# Factbook

## & Lang Annual

### TABLE OF CONTENTS

The *Aftermarket Factbook & Lang Annual* combines the latest available industry data from many sources including original AAIA research, government sources and independent research suppliers.

<b>Economic Indicators</b> . . . . .	<b>3</b>
Key Economic Indicators . . . . .	4
Aftermarket Employment . . . . .	5
Technician Employment and Wages . . . . .	6
<b>U.S. Motor Vehicle Aftermarket</b> . . . . .	<b>7</b>
Introduction to the Channel Forecast Model . . . . .	8
2011 to 2014 Forecast Assumptions . . . . .	9
U.S. Motor Vehicle Aftermarket . . . . .	10
Aftermarket Sales History and Forecast 2002 to 2014 . . . . .	11
Aftermarket Sales by Distribution Channel . . . . .	12
Automotive Aftermarket Segmentation . . . . .	13
Aftermarket Service and Retail Outlets . . . . .	14
Aftermarket Service and Retail Outlet Analysis . . . . .	15
Program Distribution Summary . . . . .	16
Retail Distribution Summary . . . . .	17
<b>Financial Indicators</b> . . . . .	<b>19</b>
Automotive Aftermarket Stock Performance . . . . .	20
Aftermarket Mergers and Acquisitions . . . . .	26
<b>Automotive Aftermarket</b> . . . . .	<b>33</b>
Consumer Profile . . . . .	34
Sales of Replacement Tires . . . . .	35
Replacement Rates for Motor Vehicle Parts and Jobs . . . . .	36
<b>Accessories</b> . . . . .	<b>39</b>
Aftermarket Accessories . . . . .	40
<b>Chemicals and Fluids</b> . . . . .	<b>43</b>
Automotive Chemicals and Fluids . . . . .	44
<b>Aftermarket Segments</b> . . . . .	<b>47</b>
Medium and Heavy Duty Truck Aftermarket . . . . .	48
Tool and Equipment Aftermarket . . . . .	49
Paint, Body and Equipment Aftermarket . . . . .	50
Bodyshop Business Industry Profile . . . . .	53
<b>Vehicle Registrations and Usage</b> . . . . .	<b>57</b>
U.S. Motor Vehicle Registrations . . . . .	58
Top 10 Light Vehicle Registrations . . . . .	59
U.S. Motor Vehicle Population . . . . .	60
Hybrid Vehicles . . . . .	62
Vehicle Operating Costs . . . . .	65
Gasoline Affordability and Vehicle Miles Traveled . . . . .	66
<b>State Summary Statistics</b> . . . . .	<b>69</b>
State Summary Statistics . . . . .	70
<b>Global Aftermarket</b> . . . . .	<b>75</b>
Global Economic and Automotive Data . . . . .	76
Global Vehicle Registrations . . . . .	78
Canadian Aftermarket . . . . .	79
Mexican Aftermarket . . . . .	82
Chinese Aftermarket . . . . .	84
<b>Glossary and Reference</b> . . . . .	<b>85</b>
Glossary of Aftermarket Terms . . . . .	86
NAICS Definitions . . . . .	90

<b>Aftermarket Data Resources</b> . . . . .	<b>91</b>
Aftermarket Data Resources . . . . .	92
<b>AAIA Market Intelligence</b> . . . . .	<b>95</b>
AAIA Market Intelligence . . . . .	96
<b>AAIA – Lang Market Comparison</b> . . . . .	<b>101</b>
Harmonization of Aftermarket Industry Data . . . . .	102

### TABLE OF CONTENTS Lang Aftermarket Annual 2012

Introduction . . . . .	2
Aftermarket Highlights . . . . .	6
Executive Summary . . . . .	11
Aftermarket Size . . . . .	29
Product Sales Analysis . . . . .	37
Service Market . . . . .	51
Service Market Outlet Performance . . . . .	65
Do-It-Yourself Market . . . . .	91
Do-It-Yourself Market Outlet Performance . . . . .	97
Aftermarket Analysis by Type of Vehicle . . . . .	117
Vehicle Age . . . . .	131
Distribution Channels . . . . .	137
Aftermarket Outlet Analysis . . . . .	158
Purchased Service . . . . .	169
Vehicle Analysis . . . . .	175
Accessories and Specialty Equipment Volume . . . . .	189
Market Dynamics . . . . .	199
Glossary of Aftermarket Terms . . . . .	209
Appendix . . . . .	213



Published by:  
Automotive Aftermarket Industry Association  
7101 Wisconsin Avenue, Suite 1300  
Bethesda, Maryland 20814  
Tel: 301-654-6664  
Fax: 301-654-3299  
www.aftermarket.org

The information contained in the 2012 *Digital Automotive Aftermarket Factbook & Lang Annual* is provided as a summary of market statistics. AAIA expresses no opinion on the data, which have been compiled from the sources referenced herein. AAIA makes no representation with respect to the accuracy or validity of the data and assumes no responsibility for the use thereof.

Copyright © 2011 by the Automotive Aftermarket Industry Association.

Reproduction in whole or in part is prohibited without the written permission of AAIA.