

————— **THE LANG** —————
AFTERMARKET ANNUAL

2022

Table of Contents

	<u>Page</u>
INTRODUCTION	2
I. HIGHLIGHTS	7-12
II. INFOGRAPHICS EXECUTIVE SUMMARY	13-43
III. AFTERMARKET SIZE	
2020 Aftermarket: Total Products and Service.....	44-50
2020 Light Vehicle Aftermarket.....	51-53
IV. PRODUCT SALES ANALYSIS 2020	
2020 Sales: 80 Major Aftermarket Product Groups	54-58
2020 Product Change	59-65
2020 Product Share and Volume Change.....	66-69
V. SERVICE MARKET	
Service Market for Light Vehicles	70-73
Service Market Volume by Region	74-76
Service Outlet Population Changes	77-79
Service Bay Population Changes.....	80-83
VI. SERVICE MARKET OUTLET PERFORMANCE	
Service Stations and Garages	84-86
Vehicle Dealers	87-89
Repair Specialists	90-92
Foreign Specialists.....	93-95

	<u>Page</u>
Tire Stores	96-98
Auto Parts Stores with Bays	99-101
Discount Stores/Mass Merchandisers with Bays.....	102-104
Other Outlets	105
Outlet Share of Service Market Growth	106-109
VII. DO-IT-YOURSELF MARKET	
Do-It-Yourself Market for Light Vehicles	110-112
Do-It-Yourself Regional Volume.....	113-115
VIII. DO-IT-YOURSELF MARKET OUTLET PERFORMANCE	
Retail Auto Parts Stores	116-118
Discount Stores/Mass Merchandisers	119-121
Jobbers.....	122-124
Vehicle Dealers.....	125-127
Drugstores/Supermarkets	128-130
All Other Do-It-Yourself Outlets.....	131-132
Outlet Share of Do-It-Yourself Growth	133-135
IX. eCOMMERCE	
eCommerce Auto Parts Sales Growth.....	136-138
eCommerce Business Mix	139-141
o2o eCommerce Sales Profile.....	142-143
X. AFTERMARKET ANALYSIS BY TYPE OF VEHICLE	
Foreign Vehicle Aftermarket	144-146
Foreign Vehicle Regional Volume.....	147-149
Domestic Vehicle Aftermarket	150-153
Light Truck Regional Volume	154-155
Aftermarket Vehicles	156-157
Aftermarket Growth by Major Vehicle Segments	158-159
XI. VEHICLE AGE	
Age of Domestic and Foreign Cars	160-162
Age of Domestic and Foreign Light Trucks	163-166

XII. DISTRIBUTION CHANNELS

Traditional Distribution	167-170
Specialized Distribution	171-174
OE Distribution	175-178
Integrated Distribution.....	179-182
Import Distribution.....	183-186
Other Distribution Channels.....	187

XIII. AFTERMARKET OUTLET ANALYSIS

Jobber Population Decline.....	188-190
Jobber Annual Sales Growth: 2010-2020.....	191-193
Auto Parts Store Population	194-196
Warehouse Distributor Population	197-198

XIV. PURCHASED SERVICE (LABOR)

Purchased Service.....	199-200
Purchased Service Share by Outlet.....	201-202
Purchased Service Growth by Outlet	203
Purchased Service Growth Share by Outlet	204

XV. VEHICLE ANALYSIS

Vehicle Population Changes.....	205-209
Annual Mileage per Vehicle.....	210-212
Annual Mileage and Gasoline Prices	213-214
Annual Mileage Change on U.S. Roads: 1973-2020	215
Regular Gasoline Prices at the Pump: 1973-2021	215
Remote Working	216-217
Car and Light Truck Product Volume	218-220

XVI. ICE & EV SALES & AFTERMARKET

ICE & EV Sales.....	221-223
Demographics of EV Buyers.....	224
ICE & EV VIO Share	225-226
ICE & EV Aftermarket Share to 2024.....	227
ICE VIO Share to 2024	228-229

XVII. ACCESSORIES AND SPECIALTY EQUIPMENT VOLUME

Light Truck Accessory Regional Volume: 2010-2020.....	230-232
Accessory Share by Type of Vehicle.....	233-236
Specialty Equipment Regional Sales.....	237-239

XVIII. AFTERMARKET DYNAMICS

Mobile Repair	240-241
Light Vehicle Independent Service Market.....	242-247
Brand Share Shrink: 1995-2020	248-249
Service and Do-It-Yourself Market Product Share	250-251

XIX. GLOSSARY OF AFTERMARKET TERMS

Definitions of Aftermarket Terms	252-255
States in Each of the Nine Geographic Regions.....	254

XX. APPENDIX

Aftermarket Parts Categories	256
------------------------------------	-----

80 Products Analyzed

Accessories-Appearance	Emission Control Parts	Relays
Accessories-Handling	Engine Bearings	Security and Detection Products
Accessories-Performance	Engine Control Modules	Sensors-Other
Air Conditioning Parts	Equipment	Shock Absorbers
Alternators	Exhaust System Parts	Spark Plugs
Antifreeze	Filters-Oil, Air, Cabin and Fuel	Starters
Ball and Roller Bearings	Front Wheel Drive Parts	Struts
Batteries	Fuel Injection Parts	Thermostats
Belts and Hoses	Fuel Pumps	Timing Components
Brake ABS Parts	Gas and Oil Additives	Tire Pressure Monitors
Brake Calipers-Loaded	Gaskets	Tools
Brake Calipers-Unloaded	Hitches and Towing Parts	Trailer Electrical Connectors
Brake Drums	Ignition Parts	Transmission Filters and Kits
Brake Hardware	Ignition Wire Sets	Valves-Engine
Brake Hydraulic Parts-Other	Instruments and Gauges	Water Pumps
Brake Master Cylinders	Lights and Lamps	Wheel Hub Assemblies
Brake Pads	Mass Air Flow Sensors	Wiper Blades, Arms and Motors
Brake Rotors	Motor and Transmission Mounts	Wire and Cable
Brake Shoes	Motor Oil	Accessories-Other
Camshafts	Oil Pumps	Chemicals-Other
Caps-Gas, Oil and Radiators	Oil Seals	Electrical Products-Other
Chassis Parts	Oxygen Sensors	Engine Parts-Other -
Chemicals - Appearance	Pistons	Fuel System Products-Other
Chemicals-Maintenance/Service	Piston Rings	Heating and Cooling Parts-Other
Clutches and Transmission Parts	Power Steering Hoses and Pumps	Steering and Suspension Parts-Other
Constant Velocity Driveshafts	Rack and Pinion Steering Units	All Other Products
Constant Velocity Joints	Radiators	

Contact Information

Jim.Lang@langmarketing.com

Office 260-399-1699

Cell 260-417-3670