

GAP USA 2003/04

Size and Structure of US Auto Service
Aftermarket 2004/03

(Global Auto Aftermarket Panel)

SAMPLE PAGES

SECTION 1 - EXECUTIVE SUMMARY

Table 1 Market at a glance in USA

Passenger car parc (units)	X million
Average car age	X years
New car sales (units)	X million
Used car sales (units)	X million
Parts' manufacturing (2000)	\$x billion
Parts' sales to aftermarket	\$x billion
- non-OE parts	X%
Service repair market (2003)	\$x billion

(Source: GAP 2004)

Data refers to 2002 unless stated otherwise

Aftermarket size / trends

Auto parts manufacturing in the USA is worth almost \$x billion, and sales to the aftermarket some \$x billion. The service repair market is worth \$x billion, up from \$x billion in 2002.

Positive market drivers include strong car sales, an increase in the number of licensed drivers (up x% in 2002), the ageing of vehicle parc, a significant increase in car usage, and low interest rates – which maintain vehicle sales. Market negatives include better quality vehicles, and longer-life parts which result in longer replacement intervals.

Numbers of players

The auto aftermarket is large and fragmented. The more than x businesses include parts' makers, parts' distributors, dealerships, and repair providers. The x-outlet strong service repair sector is consolidating, small-sized shops are losing share to larger outlets. The largest players are the chain operated service outlets, along with dealerships. The independent sector could account for over x% of the value of the service market.

Currency

Currency used throughout report is USD (\$).

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SECTION 2.1 PARTS AND COMPONENTS MANUFACTURERS

Table 9 Number of parts' manufacturers

Companies	Number
Parts' makers	x,
–non-OE	X
–OE	X

(Source: GAP 2004)

There are x manufacturers of auto parts and accessories in the USA, according to US Department of Labor (2001). They are represented by a variety of organizations, one of the largest is the Motor & Equipment Manufacturers Association–MEMA

About x of these manufacturers are exclusively non-OE, that is, they only make and supply parts for the aftermarket / replacement market. Another x are OE, that is, they make parts for installation into vehicles at the point of manufacture, and they also make for the replacement market, (USDOC-U.S. Industry and Trade Outlook 1999 data).

The largest parts' manufacturers are also the largest parts' suppliers to the aftermarket. The industry is consolidating, due to mergers and takeovers and the top x companies account for x% of the market.

Table 10 Auto parts' market – production and sales

Parts' manufacturing (2000)	US\$ x billion
–domestic market	X%
–export market	X%
Parts' imports	US\$ x billion
Parts' sales to aftermarket	US\$ x billion

(Source: GAP 2004)

Sales to the domestic market represented x% of the \$x billion worth of parts produced in the United States in 2000, according to USOAA–US Office of Automotive Affairs. Though the market is growing, North American suppliers face increased competition from imports, and also price pressure from car makers.

Sales to the aftermarket

Parts' sales to the professional service repair (aftermarket) were \$x billion, and to the DIY market \$x billion. Data sources include industry associations AAIA, Aftermarket Body Parts Association–ABPA, and APRA. Car makers are estimated to account for x% of aftermarket sales, that is of new vehicles and replacement parts.

Table 13.1 Parts' distributors, program groups (largest 16)

(Number of members in program, and warehouses or distribution centres operated.)

Rank	Program distributor	Members	Warehouses
1	X	Y	Z
2	X	Y	Z
3	X	Y	Z
4	X	Y	Z
4	X	Y	Z
5	X	Y	Z
6	X	Y	Z
7	X	Y	Z
8	X	Y	Z
9	X	Y	Z
10	X	Y	Z
11	X	Y	Z
12	X	Y	Z
13	X	Y	Z
14	X	Y	Z
15	X	Y	Z
16	X	Y	Z

(Source: GAP 2004)

Table 13.2 Parts' distributors, program groups sales of private labels

(As % of total parts' sales)

Rank	Program distributor	Private Label	Major Brands
1	X	y%	z%
2	X	y%	z%
3	X	y%	z%
4	X	y%	z%
5	X	y%	z%
6	X	y%	z%
7	X	y%	z%
8	X	y%	z%
9	X	y%	z%
10	X	y%	z%
11	X	y%	z%
12	X	y%	z%
13	X	y%	z%

(Source: GAP 2004)