

TAYSAD Aftermarket Conference

USA Automotive Aftermarket Overview

Arlene Davis

Vice President Meetings and Events

Auto Care Association

May 29, 2015

autocare™
ASSOCIATION

Independence drives us.

who we are

The auto care industry is a coast-to-coast network of more than

500,000
businesses

manufacturing



warehousing
and distribution



retail



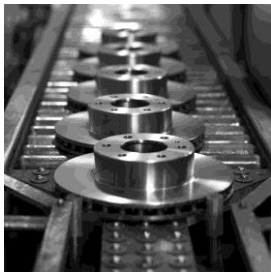
service and repair



who we are



manufacturing



warehousing
and distribution



4.2
MILLION



Auto CARE
INDUSTRY

ers



retail



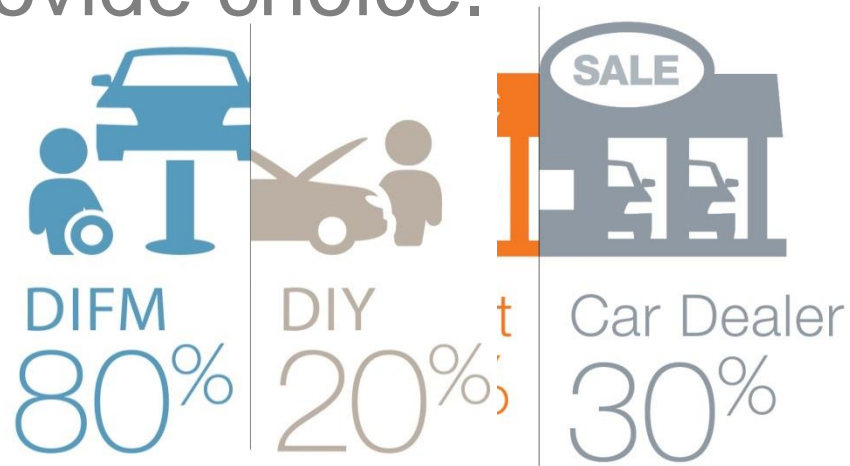
service and repair



what we do

We represent the idea that every driver should decide for themselves where to go to for car care, whether they are do-it-for-me (DIFM) customers, that take their vehicles to independent shops for service and repair, or do-it-yourselfers (DIY) that prefer their own driveway or garage.

we provide choice.



what we do

267,730

retail outlets* sell auto care products.

auto parts stores

gas stations

hardware stores

warehouse clubs

superstores

convenience stores

department stores

what we do

everywhere for every driver.

212M
licensed drivers



1.17
cars per driver

The auto care industry gets drivers where they need to go by keeping vehicles running safely, efficiently and cleanly.

market drivers

it's all about vehicles.

The more vehicles on the road, the longer those vehicles stay on the road, and the more they are driven, all strengthen the auto care industry.

market drivers

257 million all about vehicles
light vehicles

11.5 years

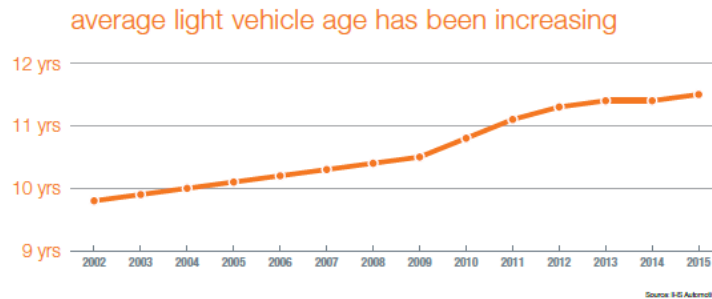
average age of vehicles

3 trillion

total annual miles driven



light vehicle fleet is increasing



11,244 miles

average annual miles driven per car

market drivers

U.S. light vehicle sales

hit **16.5 million** units in **2014**

first time >16 million since 2007

will hit **16.9 million** units in **2015**

first time in 10 years

U.S. Vehicles in Operation (VIO)

282 million vehicles in 2020
258 million vehicles in 2015



Growing at 9%

current dynamics technology standards

The Auto Care Association has four powerful industry standards, covering cataloging, product information, parts ordering and shop management. This standardized language keeps all businesses in the auto care industry profitable, efficient and ready to care for every vehicle on the road, personal or commercial.



panelist



Sheila Andrews

Manager, Government Affairs,
Auto Care Association

Director, Heavy Duty Distribution Association



panelist



Isaac Mishael

Sales Representative,
National Auto Parts Warehouse, Inc.
a division of National Performance Warehouse



panelist



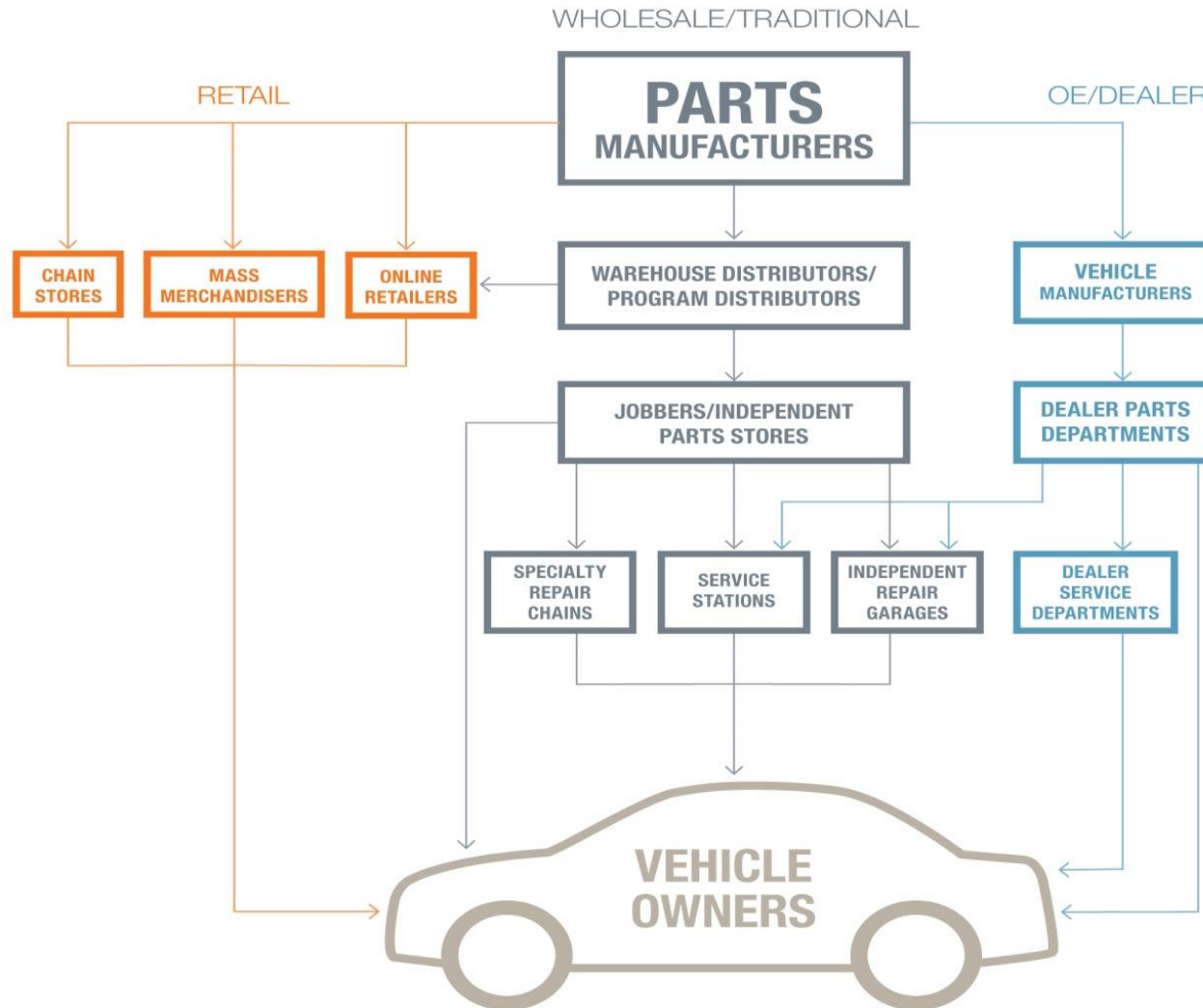
Mike Mohler, MAAP

Vice President, National Pronto Association

Vice President, Vendor Relations, 1Parts
Global Aftermarket Services Group



channels of distribution



thank you

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