DIY Automotive Market

Do-It-Yourself (DIY) light vehicle product sales sank from 21.6% to 20.2% of total light vehicle aftermarket product volume between 2010 and 2015.

Nevertheless, the Do-It-Yourself automotive aftermarket managed to record a modest sales gain, growing at a 1.4% average annual pace at user-price over this five-year span and adding $1.4 billion in product volume at user-price.

Changes in Outlet Group Market Share

Among the six major groups of DIY outlets, half expanded their DIY product share between 2005 and 2015, while the other three outlet groups each declined in DIY share.

DIY Aftermarket Leader

Retail Auto Parts Stores attained the largest DIY aftermarket share increase from 2010 to 2015, climbing from 48.6% to 50.7% of DIY automotive product volume.

Retail Auto Parts Stores underscored their DIY aftermarket dominance by amassing a greater DIY 2015 share than all other outlets combined.

Other DIY Outlet Groups

The residual category of Other Outlets achieved the second largest DIY share increase between 2010 and 2015, climbing from 7.5% to 8.2% of DIY sales at user-price.

Growth of the residual category of Other Outlets was led by Internet DIY aftermarket sales.

Another Outlet Group with Expanding DIY Share
Discount Stores/Mass Merchandisers also increased their DIY share between 2010 and 2015, but at a slower rate than Retail Auto Parts Stores or the category of Other Outlets.

Discount Stores/Mass Merchandisers climbed from 19.8% of 2010 automotive DIY product sales to 20.2% of the 2015 DIY market.

This reversed a long trend of declining Discount Stores/Mass Merchandisers DIY share that had extended over more than 25 years.

Outlets Declining In DIY Share
Jobbers suffered the largest DIY car and light truck product share decline between 2010 and 2015, falling from 17.5% to 15.8% of DIY light vehicle products at user-price.

Vehicle Dealers experienced the second largest DIY share loss over this five-year span, receding from 3.9% to 3.1% of DIY aftermarket volume.

Drugstores/Supermarkets fell from 2.7% to

2.0% DIY share between 2010 and 2015.

Significant DIY Share Shift
Combining outlet group share increases and decreases, over 6% of DIY product share shifted among the six major DIY outlet groups between 2010 and 2015.

DIY Volume Increases
The three groups of outlets with increasing DIY share each recorded DIY product dollar growth between 2010 and 2015.

Retail Auto Parts Stores attained the largest DIY sales gain, climbing from $9.6 billion to $10.8 billion at user-price, a 2.4% average annual increase.

Discount Stores/Mass Merchandisers achieved the second largest dollar gain from 2010 to 2015, growing from $3.9 billion to $4.3 billion at user-price, up an average of 2.0 % per year.

The residual category of Other Outlets climbed from $1.50 billion to $1.74 billion in DIY product sales from 2010 to 2015, averaging 3.0% annual growth, which was the strongest DIY growth rate.

Outlet Groups Falling In Dollar Volume
Jobbers recorded the smallest DIY product decline from 2010 to 2015, slipping from $3.5 billion to $3.4 billion.

Dealers fell $130 million in DIY sales from 2010 to 2015, while Drugstores/Supermarkets receded $110 million in DIY automotive product volume over the past five years.

Six Major Takeaways

- Retail Auto Parts Stores achieved the largest increase in DIY product share from 2010 to 2015, climbing from 48.6% to 50.7% of DIY volume.

- The residual category of Other Outlets (which includes Internet volume) expanded its DIY product share from 7.5% to 8.2% between 2010 and 2015.

- Discount Stores/Mass Merchandisers also boosted their DIY share, increasing from 19.8% of the 2010 DIY market to 20.2% of 2015 volume.

- Jobbers suffered a substantial share decline, dropping from 17.5% to 15.8% of DIY product sales between 2010 and 2015, while Vehicle Dealers fell 0.8% in DIY share over this five-year span. Drugstores/Supermarkets receded from 2.7% to 2.0% of DIY product volume between 2010 and 2015.

- DIY product dollar growth was achieved by each of the three outlet groups that increased their DIY share from 2010 to 2015: Retail Auto Parts Stores, Discount Stores/Mass Merchandisers, and the residual category of Other Outlets.

- Jobbers suffered the smallest DIY product dollar decline between 2010 and 2015, down $100 million, followed by Drugstores/Supermarkets which fell $110 million and Dealers which sank $130 million in DIY automotive product sales.