

Traditional DIFM & DIY Sales

"The Traditional channel increased its car and light truck product volume by \$5.5 billion at user-price between 2006 and 2016. While Do-It-For-Me (DIFM) product sales rose nearly \$6 billion in the Traditional channel over this ten-year span, Traditional channel Do-It-Yourself (DIY) product volume declined."

"The Traditional distribution channel increased its share of light vehicle DIFM product volume from 21.8% in 2006 to 24.4% by 2016. Traditional channel share of the DIY market, in contrast, declined over this ten-year span.

Traditional Channel Growth

The Traditional channel (multi-tiered distribution involving both Traditional Warehouses and/or Traditional Jobbers) product volume increased from \$18.9 billion at user-price in 2006 to \$21.1 billion by 2011.

Traditional channel sales reached \$24.4 billion by 2016, a 2.6% average annual increase since 2006. This was a stronger average annual growth rate than the 1.8% yearly gain of total car and light truck product sales during this ten-year span.

Traditional Channel Share

Traditional channel product share rose from 21.2% during 2006 to 22.3% by 2011.

Traditional channel sales generated 22.8% of total car and light truck aftermarket product volume during 2016.

DIFM Traditional Channel Sales

As the Traditional channel outstripped the average annual rate of overall car and light truck product growth between 2006 and 2016, it performed very differently in the Do-It-For-Me (DIFM) market compared to Do-It-Yourself (DIY) volume.

Traditional channel DIFM product sales rose from \$15.0 billion in 2006 to \$17.6 billion by 2011.

The Traditional channel added another \$3.2 billion in DIFM product sales over the next five years, reaching \$20.9 billion in 2016 DIFM volume at user-price.

DIY Traditional Channel Sales

The situation was much different regarding Do-It-Yourself volume.

The Traditional channel attained \$3.9 billion in 2006 DIY product sales, falling to \$3.5 billion by 2011.

The Traditional channel failed to achieve DIY growth over the next five years, recording the same \$3.5 billion sales level during 2016 as it did five years earlier.

Differing Traditional Channel Share

DIFM product volume climbed from 79.4% of Traditional channel volume during 2006, increasing to 83.4% of the 2011 volume and recording 85.7% of 2016 Traditional distribution sales.

DIY product volume, in contrast, sank from 20.6% to 16.6% of Traditional channel sales at user-price between 2006 and 2011.

This decline continued, with DIY volume accounting for only 14.3% of products flowing through the Traditional channel in 2016.

Traditional Channel Average Growth

The Traditional channel averaged 2.6% annual product growth between 2006 and 2016, a stronger performance than the overall car and light truck aftermarket.

All Traditional channel sales expansion was generated by DIFM products, which averaged 3.4% annual growth between 2006 and 2016. This was stronger than the 2.2% average annual DIFM product gain across the overall light vehicle market.

In contrast, Traditional channel DIY volume slipped at a 1.1% average annual rate between 2006 and 2016, despite the overall automotive DIY market averaging a 0.5% yearly product increase.

Six Major Takeaways

- The Traditional multi-tiered distribution channel, involving both Traditional Warehouses and/or Traditional Jobbers, increased \$5.5 billion in product volume at user-price over the past ten years (2006 to 2016).

- Traditional channel product share of the light vehicle aftermarket rose from 21.8% to 24.4% during this ten-year span.
- Although the Traditional channel outstripped overall car and light truck product growth between 2006 and 2016, it performed very differently in the Do-It-For-Me (DIFM) market compared to its Do-It-Yourself (DIY) volume.
- DIFM product sales rose from \$15.0 billion to nearly \$21.0 billion between 2006 and 2016 at user-price.
- The situation was different for DIY volume, which decreased \$0.4 billion in Traditional channel sales between 2006 and 2016.
- All Traditional channel product growth was generated by DIFM volume, which averaged 3.4% annual growth in the Traditional channel between 2006 and 2016.