

Foreign Nameplate DIFM Surge

"Foreign nameplates are expanding their light vehicle product share, with most gains achieved in the Do-It-For-Me (DIFM) aftermarket."

"Foreign nameplate cars and light trucks boosted their DIFM product share more than 800 basis points between 2011 and 2016, surging \$11 billion in DIFM product volume at user-price. In-depth analysis is presented in the just-released *2018 Lang Aftermarket Annual*."

Jim Lang

Do-It-For-Me Product Growth

The car and light truck Service (DIFM) market (products installed by mechanics) soared by more than \$11 billion at user-price between 2011 and 2016.

Light vehicle products installed by mechanics exceeded \$74 billion at user-price during 2011, up moderately from five years earlier.

DIFM Products Top \$85 Billion

Lang Marketing estimates 2016 light vehicle DIFM product sales topped \$85 billion at user-price, more than an \$11 billion gain over 2011.

Foreign nameplates accounted for nearly half of this DIFM product volume.

Evolving Nameplate DIFM Mix

As the DIFM market expanded over the past five years, there has been a substantial shift in product share generated by foreign versus domestic nameplate light vehicles.

Domestic cars and light trucks (not including Transplants) comprised a shrinking majority of DIFM product volume, slipping from 59% of 2011 DIFM products to 56% of the 2013 market.

Lang Marketing estimates domestic nameplates generated just over half of 2016 DIFM product sales in the U.S. at user-price.

Expanding Foreign DIFM Share

While domestic nameplate vehicles represent a diminishing share of DIFM aftermarket products, foreign nameplates (Imports and Transplants) are rapidly expanding their DIFM product percent.

Growing DIFM Volume

Foreign nameplates represented 41% of 2011 DIFM product sales in the U.S., climbing to 44% DIFM product share by 2013.

Lang Marketing estimates foreign nameplates generated 49% of 2016 light vehicle DIFM product volume.

Differing DIFM Dollar Sales Growth

There were significant differences in the average annual DIFM product growth of domestic and foreign nameplates between 2011 and 2016.

Flat Domestic DIFM Product Sales

Domestic nameplate DIFM product sales were nearly flat between 2011 and 2016.

Their small \$0.1 billion DIFM product increase represented only 0.2% average annual growth over these five years.

Foreign Nameplate DIFM Sales Soar

Foreign nameplate cars and light trucks achieved much stronger product growth.

Foreign nameplates recorded \$31 billion in 2011 DIFM products, climbing to \$34 billion in 2013 and achieving \$42 billion in 2016 DIFM sales at user-price.

Foreign Nameplates up \$11 Billion

This \$11 billion DIFM product gain by foreign nameplates represents 4.4% average annual growth.

Foreign nameplates generated 99% of the total light vehicle DIFM product increase at user-price between 2011 and 2016, as

foreign nameplates expanded their average annual DIFM product volume at more than 22 times the product growth pace of domestic nameplates.

Six Major Takeaways

- Foreign nameplates are rapidly expanding their aftermarket product share, with most of these gains achieved in the Do-It-For-Me (DIFM) segment.
- Lang Marketing estimates DIFM product sales topped \$85 billion at user-price during 2016, with foreign nameplates generating nearly half of this volume.
- Over the past five years, domestic nameplate cars and light trucks have slipped from 59% of 2011 DIFM product volume to 51% of the 2016 DIFM market.
- Foreign nameplates accounted for 49% of 2016 DIFM product sales, towering over their 2011 DIFM product share of 41%.
- Foreign nameplates recorded an \$11 billion surge in DIFM light vehicle product volume between 2011 and 2016.
- Foreign nameplates generated 99% of light vehicle DIFM product growth between 2011 and 2016, at user-price.