

Foreign DIFM Share Growth

"Do-It-For-Me (DIFM) product volume surged more than \$11 billion at user-price between 2011 and 2016. Domestic nameplates comprised a majority, but shrinking, share of DIFM product sales."

"Foreign nameplate light vehicles (including Transplants and Imports) expanded their DIFM product share between 2011 and 2016, greatly exceeding the annual growth pace of domestic nameplate DIFM products. For a complete analysis of foreign nameplate growth for each of 80 product categories, see the new *Foreign Nameplate Aftermarket 2020* report from Lang Marketing."

Jim Lang

Do-It-For-Me Growth

The car and light truck Do-It-For-Me market (products installed by mechanics) increased over \$11 billion at user-price between 2011 and 2016.

More Than \$85 Billion

Light vehicle products installed by mechanics topped \$85 billion at user-price during 2016, up from less than \$75 billion five years earlier.

Evolving Vehicle Mix

As light vehicle DIFM product sales expanded during these five years, there was a substantial shift in DIFM product share generated by foreign versus domestic nameplates.

Domestic Nameplates

Domestic cars and light trucks (not including Transplants) comprised a majority, but shrinking, share of DIFM product volume over these five years.

Domestic nameplates slipped from 58.5% of 2011 DIFM market sales to less than 56% of the 2013 market.

Lang Marketing estimates domestic nameplates fell to 51% of 2016 DIFM product sales at user-price, down more than one-eighth in product volume share from five years earlier.

Expanding Foreign Market Share

While domestic nameplate vehicles account for a diminishing portion of DIFM products, foreign nameplate light vehicle

product volume (including Transplants and Imports) has rapidly expanded.

Foreign nameplates represented less than 42% of 2011 DIFM product sales in the U.S., climbing to 44% of the 2013 DIFM product share.

Lang Marketing estimates foreign nameplates generated 49% of 2016 DIFM product sales at user-price.

Different Sales Growth Rates

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

Only \$0.1 Billion Gain

Domestic nameplates climbed from \$43.5 billion in 2011 DIFM product sales to an estimated \$43.6 billion by 2016.

This \$0.1 billion increase represented only 0.5% annual product growth during these five years.

Foreign Nameplates

Foreign nameplate cars and light trucks, in contrast, achieved much stronger product expansion.

Foreign nameplates recorded \$30.9 billion in 2011 DIFM products, climbing to \$34.4 billion by 2013. Lang Marketing

estimates that foreign nameplates reached nearly \$42 billion in 2016 volume at user-price.

\$11 Billion Gain

This \$11 billion gain in foreign nameplate products represents 6.3% average annual growth in foreign nameplate DIFM product volume, over 60 times the domestic nameplate DIFM annual product growth rate at user-price.

Dominant Growth Share

Foreign nameplates generated 99% of the \$11.1 billion light vehicle DIFM product increase at user-price between 2011 and 2016.

Foreign nameplates expanded their DIFM product volume at more than twice the average annual pace recorded by the total light vehicle DIFM market.

Six Major Takeaways

- Do-It-For-Me (DIFM) light vehicle product volume climbed more than \$11 billion between 2011 and 2016 at user-price.
- Domestic cars and light trucks accounted for a majority of DIFM product volume during these five years, but

they shrank in strength.

- Domestic nameplates slipped from over 58% of 2011 DIFM product sales to 51% of the 2016 market.
- Foreign nameplates rapidly expanded their share of DIFM product volume, climbing from less than 42% of 2011 DIFM product sales to 49% of the 2016 market. Foreign nameplates expanded their DIFM product volume \$11 billion between 2011 and 2016.
- Domestic nameplates accounted for only 1% of total DIFM product growth from 2011 to 2016.
- Foreign nameplates generated 99% of the \$11.1 billion DIFM light vehicle product surge between 2011 and 2016.