MARKET RESEARCH

SEMA MARKET REPORT

WHAT'S INSIDE

TRACKING THE AUTOMOTIVE SPECIALTY-EQUIPMENT INDUSTRY

COMPREHENSIVE REVIEW OF THE AUTOMOTIVE SPECIALTY-EQUIPMENT MARKET, DETAILING RETAIL SALES, PURCHASE CHANNELS, AND VEHICLE SEGMENTS. INDICATES THE OPPORTUNITIES AND TRENDS TO HELP SEMA MEMBER COMPANIES MAKE BETTER BUSINESS DECISIONS.

USA
2020

INTRODUCTION

It seems we are always telling ourselves “this has been a crazy year.” But...

2020 has been a crazy year.

There seems no other way to put it than crazy. The year 2020 has been a test for so many aspects of our society. And as I write this, the year isn’t even halfway through. The COVID-19 outbreak, shelter-in-place orders, and ongoing demonstrations are potentially shifting the way our society thinks and acts. For years, pundits have touted the coming online sales revolution and now people stuck at home are flocking to ecommerce. But is this a lasting shift or just a normal reaction to their in-the-moment needs? Travel ground to a halt during the lockdown, but surveys show people are still eager to get away and get on the road. Many have speculated that car travel and camping will see an uptick, offering a way to travel while avoiding close contact with others. Some in-person events have been cancelled or gone “virtual.” Consumers and the industry are missing out on a spring and possibly summer of car shows, big and small. It has been a challenge for trade events, so it’s fortunate that the SEMA Show is in November, which gives us all time to prepare for the best show of the year.

The specialty-equipment industry came into 2020 on a high note. The market has shown great growth over the last 10 years. Industry retail sales climbed nearly 4% to a new high of $46.2 billion in 2019. Last year, most businesses were experiencing growth and expectation were strong for the future. But 2020 has been a crazy year. The turmoil of spring deeply curtailed consumer spending for several months. Some businesses have done well in the lockdown, but many others are feeling a sharp pain. New-car sales, miles driven, unemployment, and discretionary spending—all indicators tied to our industry—have all taken a hit this year but are currently moving in a positive direction again. Overall, our research indicates that industry retail sales will likely be down 12% in 2020. As the country re-emerges from the shutdown, sales in Q3 and Q4 should rise back towards previous levels.

If there is a possible silver lining in this, many economists were predicting a recession in 2020. The COVID lockdown forced that to happen quickly. Maybe like “ripping off the band-aid,” we have gotten through the downturn stage in a matter of months, rather than years. It’s likely that mid-April was the worst of the economic recession and signs point to increasing recovery from that point forward. I expect 2021 and the next few years to continue this recovery growth in our market and related areas, such as auto sales. This may have been the deepest, quickest recession in history, but our industry is nimble, built on innovation and ready for the challenge.

I know many companies have been using this time to come up with new ideas, develop products, and prepare for the next phase of growth. I look forward to seeing all these new products at the SEMA Show in November.

If you have any questions, please contact me or the market research team. SEMA is here to help.

Gavin Knapp

Director, Market Research

SEMA

MARKET OVERVIEW

MARKET SIZING

OVERVIEW

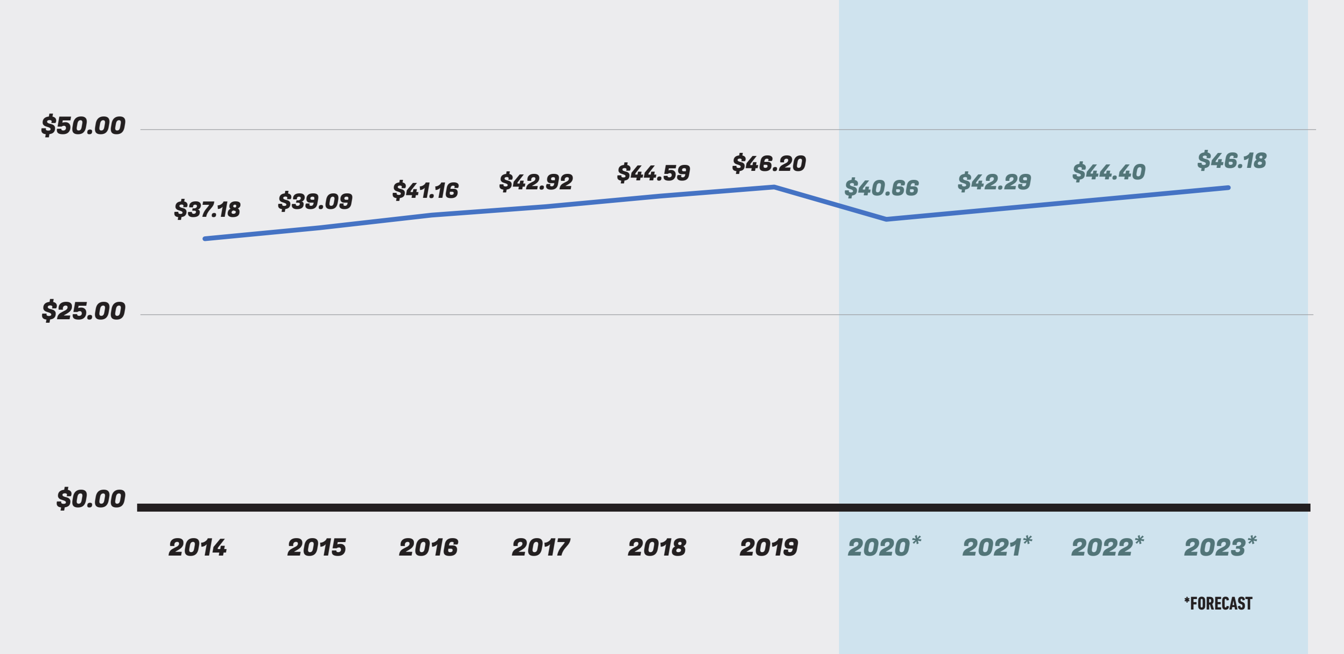
On the whole, 2019 was a year of continued growth for the specialty-equipment industry. The overall size of the U.S. market grew to $46.2 billion, representing a 3.6% increase from 2018 and a sixth consecutive year of expanding retail sales. However, SEMA expects 2020 to mark a temporary reversal of this growth trend. Due to the negative impact of COVID-19 and the containment measures adopted to limit its spread, SEMA estimates that specialty-automotive aftermarket sales will total about $40.7 billion in 2020.

The good news is that the worst of the economic recession is likely already over. After a sharp decline in economic activity through March and April, consumers and businesses began to adjust to the restrictions, and most businesses re-opened in June. While some people have put off buying specialty parts for their vehicles, others have seen the shelter-in-place orders as a perfect time to make upgrades and modifications to their cars and trucks. At publication time, the country is starting to ease these restrictions, and we expect the economy to begin recovering in earnest and return to growth much quicker than it did after the last recession.

It's still early to predict exactly how things will play out over the next couple years. However, early signs point to the slowdown being largely contained within 2020 and the economy rebounding to a growth path in 2021. The specialty automotive industry has weathered recessions before only to come back stronger. SEMA expects this time around will be no different.

SPECIALTY-EQUIPMENT RETAIL SALES $ BILLIONS

Source: 2019 SEMA US Market Data

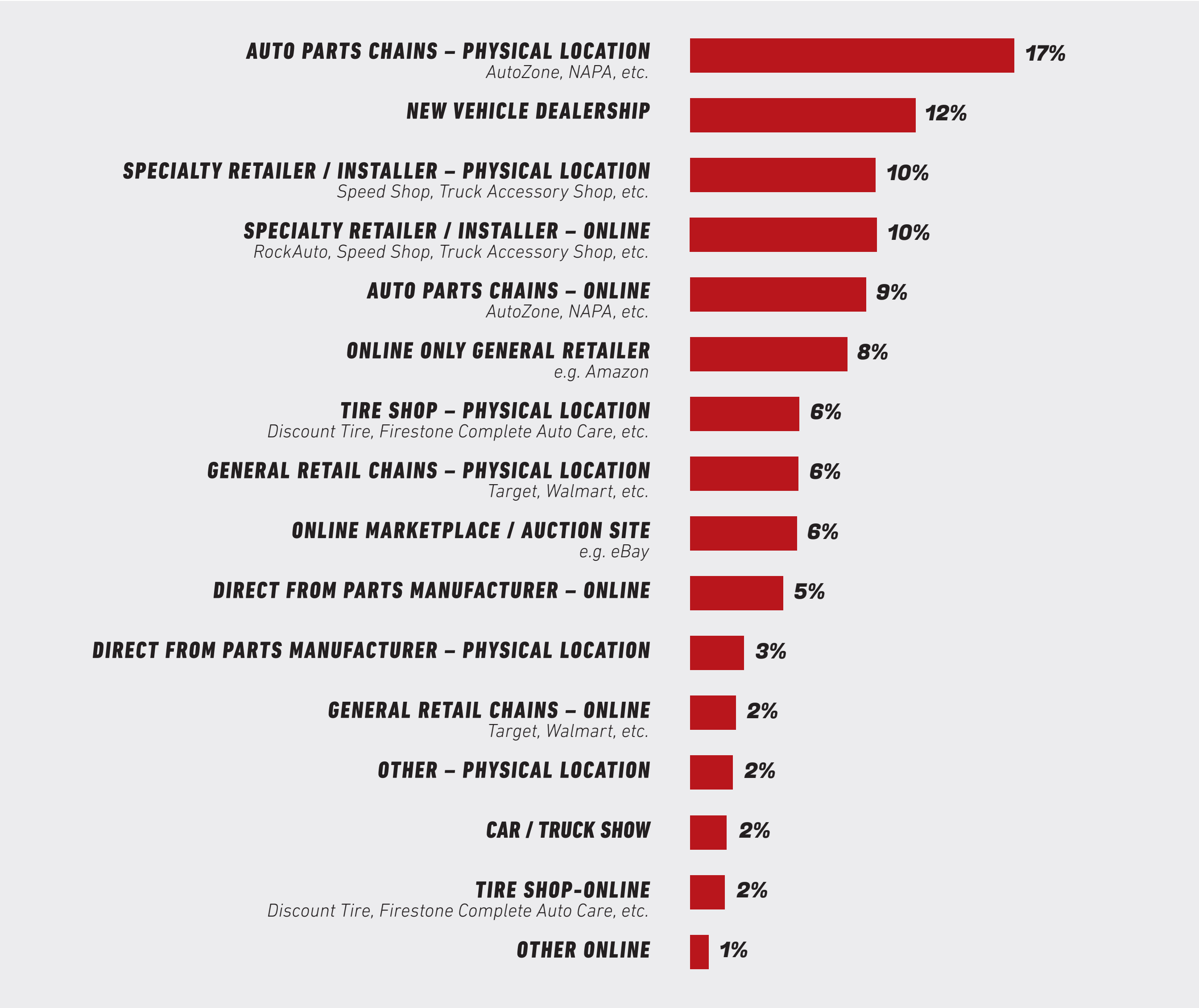


Consumers buy specialty-equipment products from a wide variety of retail locations. In-store purchases accounted for the lion's share of 2019 retail sales, representing almost 60% of the total. It is highly likely that online purchases will spike in 2020 due to COVID-19, but SEMA expects that consumer purchases will remain a mix of in-store and online going forward.

Online channels remain a key method of researching parts and purchasing cheaper, easier-to-install products. Still, sales channel preferences vary widely based on the cost, complexity, and local availability of products. For instance, transmission products and truck bedliners are more likely to be bought from specialty shops, while wax and cleaning products are more often sold through auto parts chains and general retail stores. What SEMA has found in other research is that while online channels may offer convenience and broader selection, many consumers value being able to talk with an expert in-person to make sure they find the part or item that best suits their needs.

2019 CONSUMER PURCHASE ESTIMATES BY SALES CHANNEL % OF SALES

Source: 2019 SEMA US Market Data

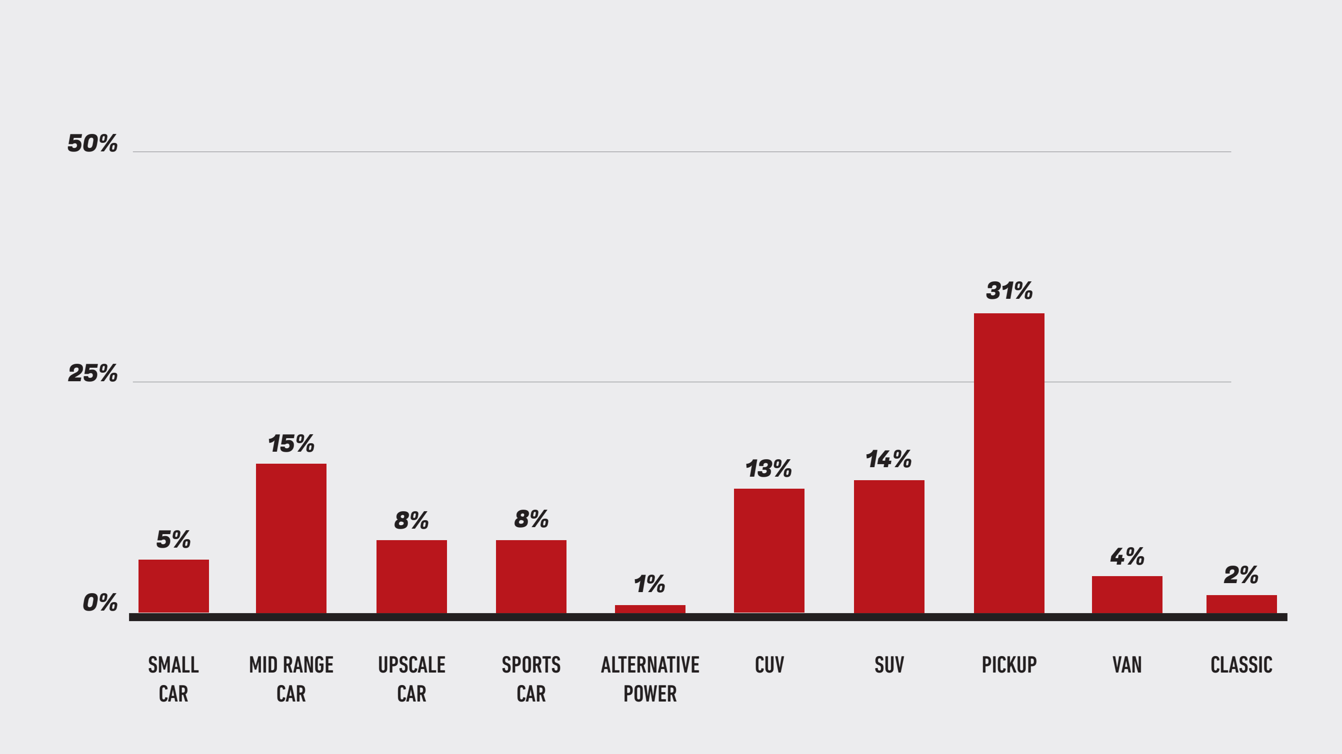


Pickup upgrades are the largest sector of the specialty-equipment industry, accounting for 31% of 2019 retail sales. Mid-range cars, CUVs, and SUVs (including the Jeep Wrangler) are also major components of the market. This tracks to some extent with the general population of vehicles on the road. Some vehicles are more likely to be modified (or modified more heavily) than others, but our industry is as diverse as the vehicle population itself. Products are made, and sold, for all types of cars and trucks.

It's also worth noting that different segments inspire different types of modifications. The vehicle segment section of the report details which part categories are preferred by owners of each vehicle type.

2019 CONSUMER PURCHASE ESTIMATES BY VEHICLE SEGMENT % OF SALES

Source: 2019 SEMA US Market Data



2019 CONSUMER PURCHASE ESTIMATES $ BILLIONS

Source: 2019 SEMA US Market Data

ACCESSORY AND APPEARANCE PRODUCTS: $24.51 BILLION

	2019		MARKET SIZE	2020 FORECAST
CHEMICALS	$7.24	Maintenance Oils and Additives	$4.23	$6.30
		Wax and Cleaning Products	$1.85	
		Paint Powdercoating and Plating	$1.16	
EXTERIOR BODY	$5.26	Fender, Hood, and Body Upgrades	$1.91	$4.62
		Exterior Appearance Upgrades	$1.76	
		Body Finishing Products	$1.58	
EXTERIOR UTILITY	$3.45	Trailer and Towing Products	$0.85	$3.13
		Truck Bedliners and Other Bed Accessories	$0.80	
		Racks and Carriers	$0.74	
		Truck Bed Covers	$0.54	
		Truck Caps	$0.51	
INTERIOR	$2.45	Seats and Upholstery	$0.95	$2.14
		Floor Mats and Interior Appearance Products	$0.90	
		Dash System and Gauges	$0.61	
LIGHTING	$2.22	Head / Tail Lights	$1.31	$1.95
		Exterior Accessory Lighting	$0.71	
		Interior Lights	$0.20	
MOBILE ELECTRONICS	$3.19	Sound System and Audio Accessories	$1.03	$2.73
		Alarms and Security Products	$0.82	
		Navigation Systems	$0.47	
		Mobile TV and Video Cameras	$0.45	
		Wireless and Smartphone Integration Products	$0.43	
DRIVER ASSIST SYSTEMS	$0.71	Driver Assist Systems	$0.71	$0.61

2019 CONSUMER PURCHASE ESTIMATE $ BILLIONS

Source: 2019 SEMA US Market Data

PERFORMANCE PRODUCTS: $11.06 BILLION

	2019		MARKET SIZE	2020 FORECAST
DRIVETRAIN	$3.31	Transmission Products	$1.96	$2.92
		Axles and Differential	$0.76	
		Clutches and Related Products	$0.50	
		Shifters	$0.10	
ENGINE ELECTRICAL AND IGNITION	$1.80	Ignition Products	$0.82	$1.60
		Engine Control and Computer Products	$0.49	
		Batteries and Related Products	$0.49	
ENGINE INTERNAL AND COOLING	$2.01	Internal Engine Products	$1.42	$1.78
		Cooling System Products	$0.35	
		Engine Dress-Up Products	$0.24	
INTAKE / FUEL / EXHAUST	$3.44	Exhaust Products	$1.44	$3.05
		Air Intake Products	$0.73	
		Forced Induction Systems	$0.72	
		Carburetor and Fuel System Products	$0.55	
SAFETY GEAR	$0.50	Roll Cage and Safety Products	$0.36	$0.41
		Racing and Protection Apparel	$0.14	

WHEELS, TIRES AND SUSPENSION: $10.63 BILLION

	2019		MARKET SIZE	2020 FORECAST
SUSPENSION / BRAKES / STEERING	$4.85	Suspension Products	$2.42	$4.35
		Brake Products	$2.12	
		Steering Products	$0.30	
WHEELS / TIRES	$5.78	Performance / Special Purpose Tires	$2.54	$5.08
		Off-Road / Plus Size Tires	$1.88	
		Custom Wheels	$1.36	

MAINTENANCE OILS AND ADDITIVES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$3.67 BILLION	$3.93 BILLION	$4.10 BILLION	$4.23 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	45%
Car / Truck Show	<1%
Direct from Parts Manufacturer	1%
General Retail Chains	15%
New Vehicle Dealership	8%
Specialty Retailer/Installer	6%
Tire Shop	3%
Other	2%

ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	1%
General Retail Chains	3%
Online Marketplace/Auction Site	1%
Online Only General Retailer	2%
Specialty Retailer/Installer	2%
Tire Shop	<1%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	19%
Upscale Car	8%
Sports Car	5%
Alternative Power	1%
CUV	13%
SUV	15%
Pickup	26%
Van	4%
Classic	1%

EXAMPLE PARTS

Engine Treatments, Engine / Injector Cleaner,
Fuel Additives, Performance ATF,
Performance Gear Oil,
Performance Motor Oil / Synthetic Oil

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
13% OF PURCHASES	9% OF PURCHASES	6% OF PURCHASES	73% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

38%

DIY INSTALLATION SHARE

75%

WAX AND CLEANING PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.69 BILLION	$1.76 BILLION	$1.80 BILLION	$1.85 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	34%
Car / Truck Show	1%
Direct from Parts Manufacturer	2%
General Retail Chains	23%
New Vehicle Dealership	5%
Specialty Retailer/Installer	4%
Tire Shop	1%
Other	2%

ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	1%
General Retail Chains	4%
Online Marketplace/Auction Site	2%
Online Only General Retailer	9%
Specialty Retailer/Installer	3%
Tire Shop	1%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	7%
Mid Range Car	18%
Upscale Car	10%
Sports Car	6%
Alternative Power	1%
CUV	14%
SUV	11%
Pickup	27%
Van	5%
Classic	1%

EXAMPLE PARTS

Cleaning Products (interior or exterior),
Polish / Wax,
Other Chemicals

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
22% OF PURCHASES	7% OF PURCHASES	7% OF PURCHASES	64% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
58%	90%

PAINT POWDERCOATING AND PLATING

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.09 BILLION	$1.13 BILLION	$1.14 BILLION	$1.16 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	21%
Car / Truck Show	<1%
Direct from Parts Manufacturer	7%
General Retail Chains	6%
New Vehicle Dealership	8%
Specialty Retailer/Installer	18%
Tire Shop	1%
Other	5%

ONLINE	
Auto Parts Chains	8%
Direct from Parts Manufacturer	6%
General Retail Chains	3%
Online Marketplace/Auction Site	4%
Online Only General Retailer	2%
Specialty Retailer/Installer	8%
Tire Shop	3%
Other	0%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	21%
Upscale Car	9%
Sports Car	12%
Alternative Power	1%
CUV	10%
SUV	11%
Pickup	25%
Van	3%
Classic	2%

EXAMPLE PARTS

Paint Powdercoating / Plating

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
23% OF PURCHASES	12% OF PURCHASES	10% OF PURCHASES	54% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
50%	58%

FENDER, HOOD AND BODY UPGRADES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.71 BILLION	$1.78 BILLION	$1.84 BILLION	$1.91 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION

Auto Parts Chains	10%
Car / Truck Show	4%
Direct from Parts Manufacturer	3%
General Retail Chains	3%
New Vehicle Dealership	17%
Specialty Retailer/Installer	11%
Tire Shop	2%
Other	1%

ONLINE

Auto Parts Chains	8%
Direct from Parts Manufacturer	8%
General Retail Chains	1%
Online Marketplace/Auction Site	8%
Online Only General Retailer	10%
Specialty Retailer/Installer	13%
Tire Shop	2%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	16%
Upscale Car	8%
Sports Car	16%
Alternative Power	2%
CUV	13%
SUV	14%
Pickup	22%
Van	3%
Classic	1%

EXAMPLE PARTS

Fenders, Hood, Body Modifications,
Bumper / Grille Guard / Step Bumper

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
42% OF PURCHASES	14% OF PURCHASES	13% OF PURCHASES	31% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

61%

DIY INSTALLATION SHARE

51%

EXTERIOR APPEARANCE UPGRADES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.58 BILLION	$1.66 BILLION	$1.70 BILLION	$1.76 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	9%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	3%
New Vehicle Dealership	18%
Specialty Retailer/Installer	12%
Tire Shop	2%
Other	1%
ONLINE	
Auto Parts Chains	10%
Direct from Parts Manufacturer	5%
General Retail Chains	2%
Online Marketplace/Auction Site	8%
Online Only General Retailer	13%
Specialty Retailer/Installer	10%
Tire Shop	<1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	4%
Mid Range Car	11%
Upscale Car	7%
Sports Car	6%
Alternative Power	1%
CUV	14%
SUV	17%
Pickup	37%
Van	3%
Classic	<1%

EXAMPLE PARTS

Grille, Side Steps / Running Boards,
Mirrors, Sunroof / Moonroof,
Window Shades / Vents,
Other Exterior Body Upgrades

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
39% OF PURCHASES	14% OF PURCHASES	11% OF PURCHASES	35% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

57%

DIY INSTALLATION SHARE

50%

BODY FINISHING PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.45 BILLION	$1.48 BILLION	$1.53 BILLION	$1.58 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	9%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	4%
New Vehicle Dealership	12%
Specialty Retailer/Installer	29%
Tire Shop	3%
Other	5%
ONLINE	
Auto Parts Chains	5%
Direct from Parts Manufacturer	3%
General Retail Chains	2%
Online Marketplace/Auction Site	7%
Online Only General Retailer	9%
Specialty Retailer/Installer	8%
Tire Shop	<1%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	18%
Upscale Car	10%
Sports Car	8%
Alternative Power	1%
CUV	17%
SUV	14%
Pickup	23%
Van	4%
Classic	1%

EXAMPLE PARTS

Decals / Graphics / Emblems / Wraps, Window Tinting / Lamination

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
31% OF PURCHASES	10% OF PURCHASES	9% OF PURCHASES	50% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

62%

DIY INSTALLATION SHARE

48%

TRAILER AND TOWING PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.76 BILLION	$0.77 BILLION	$0.81 BILLION	$0.85 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	12%
Car / Truck Show	2%
Direct from Parts Manufacturer	4%
General Retail Chains	11%
New Vehicle Dealership	13%
Specialty Retailer/Installer	12%
Tire Shop	2%
Other	3%

ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	4%
General Retail Chains	3%
Online Marketplace/Auction Site	5%
Online Only General Retailer	9%
Specialty Retailer/Installer	10%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	2%
Mid Range Car	4%
Upscale Car	6%
Sports Car	1%
Alternative Power	1%
CUV	14%
SUV	21%
Pickup	47%
Van	4%
Classic	1%

EXAMPLE PARTS

Trailer Hitch,

Winch

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
31% OF PURCHASES	9% OF PURCHASES	10% OF PURCHASES	50% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
53%	65%

RACKS AND CARRIERS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.63 BILLION	$0.67 BILLION	$0.71 BILLION	$0.80 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	8%
Car / Truck Show	3%
Direct from Parts Manufacturer	4%
General Retail Chains	5%
New Vehicle Dealership	16%
Specialty Retailer/Installer	8%
Tire Shop	2%
Other	1%

ONLINE	
Auto Parts Chains	8%
Direct from Parts Manufacturer	8%
General Retail Chains	3%
Online Marketplace/Auction Site	9%
Online Only General Retailer	13%
Specialty Retailer/Installer	8%
Tire Shop	1%
Other	3%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	2%
Mid Range Car	9%
Upscale Car	3%
Sports Car	1%
Alternative Power	1%
CUV	29%
SUV	24%
Pickup	23%
Van	7%
Classic	<1%

EXAMPLE PARTS

Hitch Mounted Cargo Carrier,
Roof Rack / Carriers,
Mounted Tent (Roof / Truck Bed),
Other Exterior Accessories

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
43% OF PURCHASES	15% OF PURCHASES	13% OF PURCHASES	28% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

66%

DIY INSTALLATION SHARE

57%

TRUCK BEDLINERS AND OTHER BED ACCESSORIES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.68 BILLION	$0.70 BILLION	$0.72 BILLION	$0.74 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	8%
Car / Truck Show	2%
Direct from Parts Manufacturer	5%
General Retail Chains	8%
New Vehicle Dealership	14%
Specialty Retailer/Installer	17%
Tire Shop	2%
Other	4%
ONLINE	
Auto Parts Chains	6%
Direct from Parts Manufacturer	4%
General Retail Chains	3%
Online Marketplace/Auction Site	5%
Online Only General Retailer	10%
Specialty Retailer/Installer	11%
Tire Shop	<1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	0%
Mid Range Car	0%
Upscale Car	0%
Sports Car	0%
Alternative Power	0%
CUV	0%
SUV	0%
Pickup	100%
Van	0%
Classic	0%

EXAMPLE PARTS

Pickup Bed Rack System,
Drop-in or Spray Bedliner,
Tool Box

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
27% OF PURCHASES	12% OF PURCHASES	7% OF PURCHASES	55% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
61%	58%

TRUCK BED COVERS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.49 BILLION	$0.50 BILLION	$0.52 BILLION	$0.54 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	2%
Car / Truck Show	1%
Direct from Parts Manufacturer	1%
General Retail Chains	1%
New Vehicle Dealership	15%
Specialty Retailer/Installer	23%
Tire Shop	1%
Other	4%

ONLINE	
Auto Parts Chains	2%
Direct from Parts Manufacturer	5%
General Retail Chains	0%
Online Marketplace/Auction Site	7%
Online Only General Retailer	17%
Specialty Retailer/Installer	18%
Tire Shop	2%
Other	0%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	0%
Mid Range Car	0%
Upscale Car	0%
Sports Car	0%
Alternative Power	0%
CUV	0%
SUV	0%
Pickup	99%
Van	0%
Classic	<1%

EXAMPLE PARTS

Pickup Tonneau Cover

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
49% OF PURCHASES	6% OF PURCHASES	6% OF PURCHASES	39% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
55%	63%

TRUCK CAPS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.49 BILLION	$0.49 BILLION	$0.50 BILLION	$0.51 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	7%
Car / Truck Show	3%
Direct from Parts Manufacturer	2%
General Retail Chains	2%
New Vehicle Dealership	16%
Specialty Retailer/Installer	30%
Tire Shop	3%
Other	9%
ONLINE	
Auto Parts Chains	3%
Direct from Parts Manufacturer	3%
General Retail Chains	0%
Online Marketplace/Auction Site	5%
Online Only General Retailer	2%
Specialty Retailer/Installer	11%
Tire Shop	5%
Other	0%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	0%
Mid Range Car	0%
Upscale Car	0%
Sports Car	0%
Alternative Power	0%
CUV	0%
SUV	0%
Pickup	100%
Van	0%
Classic	0%

EXAMPLE PARTS

Pickup Truck Cap / Shell

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
17% OF PURCHASES	22% OF PURCHASES	7% OF PURCHASES	54% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
43%	39%

SEATS AND UPHOLSTERY

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.86 BILLION	$0.88 BILLION	$0.92 BILLION	$0.95 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	12%
Car / Truck Show	5%
Direct from Parts Manufacturer	4%
General Retail Chains	6%
New Vehicle Dealership	9%
Specialty Retailer/Installer	10%
Tire Shop	2%
Other	2%

ONLINE	
Auto Parts Chains	10%
Direct from Parts Manufacturer	5%
General Retail Chains	4%
Online Marketplace/Auction Site	10%
Online Only General Retailer	11%
Specialty Retailer/Installer	8%
Tire Shop	<1%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	20%
Upscale Car	10%
Sports Car	3%
Alternative Power	1%
CUV	21%
SUV	11%
Pickup	21%
Van	4%
Classic	2%

EXAMPLE PARTS

Custom Seats, Headliners, Upholstery

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
43% OF PURCHASES	10% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
10% OF PURCHASES	37% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

38%

DIY INSTALLATION SHARE

62%

FLOOR MATS AND INTERIOR APPEARANCE PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.83 BILLION	$0.85 BILLION	$0.88 BILLION	$0.90 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	16%
Car / Truck Show	2%
Direct from Parts Manufacturer	2%
General Retail Chains	8%
New Vehicle Dealership	14%
Specialty Retailer/Installer	4%
Tire Shop	2%
Other	1%

ONLINE	
Auto Parts Chains	12%
Direct from Parts Manufacturer	3%
General Retail Chains	3%
Online Marketplace/Auction Site	8%
Online Only General Retailer	14%
Specialty Retailer/Installer	9%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	18%
Upscale Car	8%
Sports Car	4%
Alternative Power	1%
CUV	21%
SUV	11%
Pickup	23%
Van	7%
Classic	1%

EXAMPLE PARTS

Cargo / Trunk Mat,
Custom Floor Mats/Carpeting
Knobs / Handles, Interior Mirrors,
Pedals, Other Interior Products

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
48% OF PURCHASES	10% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
10% OF PURCHASES	32% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

32%

DIY INSTALLATION SHARE

80%

DASH SYSTEM AND GAUGES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.55 BILLION	$0.57 BILLION	$0.58 BILLION	$0.61 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	13%
Car / Truck Show	4%
Direct from Parts Manufacturer	4%
General Retail Chains	2%
New Vehicle Dealership	18%
Specialty Retailer/Installer	5%
Tire Shop	3%
Other	2%
ONLINE	
Auto Parts Chains	12%
Direct from Parts Manufacturer	5%
General Retail Chains	2%
Online Marketplace/Auction Site	8%
Online Only General Retailer	10%
Specialty Retailer/Installer	9%
Tire Shop	<1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	4%
Mid Range Car	19%
Upscale Car	8%
Sports Car	10%
Alternative Power	1%
CUV	20%
SUV	10%
Pickup	21%
Van	5%
Classic	3%

EXAMPLE PARTS

Retrofit Air Conditioning System, Dash Kits, Custom Gauges

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
48% OF PURCHASES	13% OF PURCHASES	13% OF PURCHASES	26% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
48%	60%

HEAD / TAIL LIGHTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.15 BILLION	$1.23 BILLION	$1.26 BILLION	$1.31 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	21%
Car / Truck Show	1%
Direct from Parts Manufacturer	2%
General Retail Chains	3%
New Vehicle Dealership	10%
Specialty Retailer/Installer	5%
Tire Shop	2%
Other	1%

ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	5%
General Retail Chains	3%
Online Marketplace/Auction Site	7%
Online Only General Retailer	15%
Specialty Retailer/Installer	11%
Tire Shop	1%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	18%
Upscale Car	13%
Sports Car	7%
Alternative Power	1%
CUV	14%
SUV	14%
Pickup	23%
Van	4%
Classic	1%

EXAMPLE PARTS

Head Light / Tail Light Housings / Covers / etc,
Upgrade Replacement Bulbs

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
48% OF PURCHASES	12% OF PURCHASES	8% OF PURCHASES	33% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
58%	74%

EXTERIOR ACCESSORY LIGHTING

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.65 BILLION	$0.68 BILLION	$0.69 BILLION	$0.71 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	13%
Car / Truck Show	2%
Direct from Parts Manufacturer	2%
General Retail Chains	4%
New Vehicle Dealership	10%
Specialty Retailer/Installer	5%
Tire Shop	1%
Other	1%

ONLINE	
Auto Parts Chains	12%
Direct from Parts Manufacturer	7%
General Retail Chains	4%
Online Marketplace/Auction Site	8%
Online Only General Retailer	21%
Specialty Retailer/Installer	9%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	15%
Upscale Car	7%
Sports Car	6%
Alternative Power	1%
CUV	15%
SUV	15%
Pickup	30%
Van	5%
Classic	<1%

EXAMPLE PARTS

Exterior Lighting Add-On,
Driving / Fog Lights,
Other Lighting Products

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
48% OF PURCHASES	14% OF PURCHASES	10% OF PURCHASES	28% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
64%	68%

INTERIOR LIGHTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.17 BILLION	$0.18 BILLION	$0.19 BILLION	$0.20 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	21%
Car / Truck Show	1%
Direct from Parts Manufacturer	3%
General Retail Chains	7%
New Vehicle Dealership	7%
Specialty Retailer/Installer	4%
Tire Shop	1%
Other	2%

ONLINE	
Auto Parts Chains	13%
Direct from Parts Manufacturer	4%
General Retail Chains	2%
Online Marketplace/Auction Site	10%
Online Only General Retailer	15%
Specialty Retailer/Installer	8%
Tire Shop	2%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	7%
Mid Range Car	19%
Upscale Car	14%
Sports Car	7%
Alternative Power	1%
CUV	16%
SUV	13%
Pickup	19%
Van	3%
Classic	1%

EXAMPLE PARTS

Interior Lighting

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
48% OF PURCHASES	11% OF PURCHASES	9% OF PURCHASES	32% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
31%	74%

SOUND SYSTEM AND AUDIO ACCESSORIES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.02 BILLION	$1.02 BILLION	$1.03 BILLION	$1.03 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	10%
Car / Truck Show	1%
Direct from Parts Manufacturer	2%
General Retail Chains	9%
New Vehicle Dealership	10%
Specialty Retailer/Installer	12%
Tire Shop	<1%
Other	3%
ONLINE	
Auto Parts Chains	6%
Direct from Parts Manufacturer	3%
General Retail Chains	5%
Online Marketplace/Auction Site	9%
Online Only General Retailer	18%
Specialty Retailer/Installer	7%
Tire Shop	1%
Other	3%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	7%
Mid Range Car	19%
Upscale Car	10%
Sports Car	5%
Alternative Power	1%
CUV	13%
SUV	12%
Pickup	30%
Van	4%
Classic	<1%

EXAMPLE PARTS

Satellite Radio Add-On, In-Dash Stereo System, Speakers / Subwoofer / Amplifier, Other Mobile Electronics Products

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
43% OF PURCHASES	12% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
10% OF PURCHASES	34% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

53%

DIY INSTALLATION SHARE

64%

ALARMS AND SECURITY PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.84 BILLION	$0.82 BILLION	$0.83 BILLION	$0.82 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	6%
Car / Truck Show	1%
Direct from Parts Manufacturer	3%
General Retail Chains	3%
New Vehicle Dealership	27%
Specialty Retailer/Installer	15%
Tire Shop	2%
Other	1%
ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	7%
General Retail Chains	2%
Online Marketplace/Auction Site	5%
Online Only General Retailer	8%
Specialty Retailer/Installer	6%
Tire Shop	<1%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	21%
Upscale Car	10%
Sports Car	5%
Alternative Power	1%
CUV	16%
SUV	14%
Pickup	17%
Van	9%
Classic	0%

EXAMPLE PARTS

Alarm / Remote Start / Keyless Entry

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
36% OF PURCHASES	15% OF PURCHASES	7% OF PURCHASES	42% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
44%	40%

NAVIGATION SYSTEMS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.49 BILLION	$0.48 BILLION	$0.47 BILLION	$0.47 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	5%
Car / Truck Show	2%
Direct from Parts Manufacturer	2%
General Retail Chains	7%
New Vehicle Dealership	15%
Specialty Retailer/Installer	6%
Tire Shop	1%
Other	2%

ONLINE	
Auto Parts Chains	8%
Direct from Parts Manufacturer	4%
General Retail Chains	6%
Online Marketplace/Auction Site	12%
Online Only General Retailer	19%
Specialty Retailer/Installer	8%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	11%
Mid Range Car	22%
Upscale Car	9%
Sports Car	6%
Alternative Power	1%
CUV	20%
SUV	15%
Pickup	14%
Van	3%
Classic	<1%

EXAMPLE PARTS

GPS Navigation System

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
48% OF PURCHASES	15% OF PURCHASES	9% OF PURCHASES	29% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

30%

DIY INSTALLATION SHARE

59%

MOBILE TV AND VIDEO CAMERAS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.43 BILLION	$0.44 BILLION	$0.44 BILLION	$0.45 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	6%
Car / Truck Show	2%
Direct from Parts Manufacturer	2%
General Retail Chains	6%
New Vehicle Dealership	13%
Specialty Retailer/Installer	8%
Tire Shop	2%
Other	2%

ONLINE	
Auto Parts Chains	6%
Direct from Parts Manufacturer	3%
General Retail Chains	5%
Online Marketplace/Auction Site	11%
Online Only General Retailer	27%
Specialty Retailer/Installer	7%
Tire Shop	<1%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	22%
Upscale Car	10%
Sports Car	4%
Alternative Power	1%
CUV	18%
SUV	16%
Pickup	19%
Van	4%
Classic	<1%

EXAMPLE PARTS

Dashboard Camera,
DVD Player / Video Monitor / Mobile Satellite TV

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
50% OF PURCHASES	16% OF PURCHASES	8% OF PURCHASES	25% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

61%

DIY INSTALLATION SHARE

63%

WIRELESS AND SMARTPHONE INTEGRATION PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.39 BILLION	$0.41 BILLION	$0.42 BILLION	$0.43 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	6%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	9%
New Vehicle Dealership	13%
Specialty Retailer/Installer	8%
Tire Shop	1%
Other	2%
ONLINE	
Auto Parts Chains	7%
Direct from Parts Manufacturer	6%
General Retail Chains	7%
Online Marketplace/Auction Site	8%
Online Only General Retailer	19%
Specialty Retailer/Installer	7%
Tire Shop	1%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	19%
Upscale Car	13%
Sports Car	5%
Alternative Power	3%
CUV	18%
SUV	16%
Pickup	15%
Van	3%
Classic	<1%

EXAMPLE PARTS

In-Car Wi-Fi Access / Mobile Hot Spot, Smartphone Integration - Hands-Free Talk, Smartphone Integration - Stereo Connection

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
43% OF PURCHASES	19% OF PURCHASES	11% OF PURCHASES	28% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

62%

DIY INSTALLATION SHARE

61%

DRIVER ASSIST SYSTEMS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2018 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
NOT AVAILABLE	$0.63 BILLION	$0.68 BILLION	$0.71 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	7%
Car / Truck Show	4%
Direct from Parts Manufacturer	5%
General Retail Chains	3%
New Vehicle Dealership	23%
Specialty Retailer/Installer	8%
Tire Shop	1%
Other	2%
ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	6%
General Retail Chains	2%
Online Marketplace/Auction Site	7%
Online Only General Retailer	13%
Specialty Retailer/Installer	7%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	7%
Mid Range Car	20%
Upscale Car	11%
Sports Car	3%
Alternative Power	2%
CUV	22%
SUV	13%
Pickup	16%
Van	6%
Classic	1%

EXAMPLE PARTS

Backup Camera, Blind Spot Monitoring
Front Collision Warning,
Lane Departure Warning,
Other Driver Assist Systems

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
37% OF PURCHASES	17% OF PURCHASES	12% OF PURCHASES	33% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
43%	45%

TRANSMISSION PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.74 BILLION	$1.79 BILLION	$1.88 BILLION	$1.96 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	15%
Car / Truck Show	2%
Direct from Parts Manufacturer	5%
General Retail Chains	2%
New Vehicle Dealership	13%
Specialty Retailer/Installer	12%
Tire Shop	3%
Other	6%

ONLINE	
Auto Parts Chains	7%
Direct from Parts Manufacturer	5%
General Retail Chains	4%
Online Marketplace/Auction Site	5%
Online Only General Retailer	5%
Specialty Retailer/Installer	13%
Tire Shop	1%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	14%
Upscale Car	8%
Sports Car	5%
Alternative Power	1%
CUV	7%
SUV	9%
Pickup	41%
Van	3%
Classic	3%

EXAMPLE PARTS

Bellhousing, Torque Converters, Performance Upgrade/Replacement Transmission, Transmission Cooler, Engine/Transmission Sensors, Other Drivetrain Products

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
38% OF PURCHASES	18% OF PURCHASES	7% OF PURCHASES	37% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

44%

DIY INSTALLATION SHARE

48%

AXLES AND DIFFERENTIAL

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.69 BILLION	$0.71 BILLION	$0.74 BILLION	$0.76 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	16%
Car / Truck Show	4%
Direct from Parts Manufacturer	3%
General Retail Chains	2%
New Vehicle Dealership	13%
Specialty Retailer/Installer	8%
Tire Shop	4%
Other	1%
ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	6%
General Retail Chains	3%
Online Marketplace/Auction Site	7%
Online Only General Retailer	4%
Specialty Retailer/Installer	19%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	11%
Mid Range Car	13%
Upscale Car	9%
Sports Car	8%
Alternative Power	1%
CUV	12%
SUV	14%
Pickup	23%
Van	2%
Classic	6%

EXAMPLE PARTS

Axles, Driveshaft,
Limited Slip / Locking Differential /
Differential Housing / Ring & Pinion,
U-Joints

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
49% OF PURCHASES	12% OF PURCHASES	6% OF PURCHASES	33% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

56%

DIY INSTALLATION SHARE

66%

CLUTCHES AND RELATED PRODUCTS

Source: 2019 SEMA US Market Data

2017 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.45 BILLION	$0.45 BILLION	$0.47 BILLION	$0.50 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	15%
Car / Truck Show	3%
Direct from Parts Manufacturer	3%
General Retail Chains	2%
New Vehicle Dealership	9%
Specialty Retailer/Installer	12%
Tire Shop	3%
Other	1%
ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	7%
General Retail Chains	1%
Online Marketplace/Auction Site	6%
Online Only General Retailer	7%
Specialty Retailer/Installer	13%
Tire Shop	2%
Other	3%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	14%
Upscale Car	13%
Sports Car	19%
Alternative Power	1%
CUV	5%
SUV	6%
Pickup	28%
Van	0%
Classic	6%

EXAMPLE PARTS

Clutches / Clutch Plates / Flywheel

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
46% OF PURCHASES	12% OF PURCHASES	7% OF PURCHASES	35% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

42%

DIY INSTALLATION SHARE

52%

SHIFTERS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.09 BILLION	$0.10 BILLION	$0.10 BILLION	$0.10 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	10%
Car / Truck Show	3%
Direct from Parts Manufacturer	2%
General Retail Chains	4%
New Vehicle Dealership	11%
Specialty Retailer/Installer	5%
Tire Shop	3%
Other	1%

ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	9%
General Retail Chains	3%
Online Marketplace/Auction Site	8%
Online Only General Retailer	8%
Specialty Retailer/Installer	14%
Tire Shop	2%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	10%
Mid Range Car	15%
Upscale Car	15%
Sports Car	21%
Alternative Power	2%
CUV	15%
SUV	8%
Pickup	10%
Van	2%
Classic	3%

EXAMPLE PARTS

Shifter Knob / Handle, Short Throw Shifter

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
44% OF PURCHASES	15% OF PURCHASES	10% OF PURCHASES	32% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

35%

DIY INSTALLATION SHARE

70%

IGNITION PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.70 BILLION	$0.74 BILLION	$0.80 BILLION	$0.82 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	29%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	3%
New Vehicle Dealership	10%
Specialty Retailer/Installer	5%
Tire Shop	2%
Other	2%

ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	2%
General Retail Chains	1%
Online Marketplace/Auction Site	7%
Online Only General Retailer	4%
Specialty Retailer/Installer	13%
Tire Shop	3%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	12%
Mid Range Car	20%
Upscale Car	7%
Sports Car	5%
Alternative Power	1%
CUV	14%
SUV	14%
Pickup	18%
Van	8%
Classic	2%

EXAMPLE PARTS

Alternator, Ignition Controllers / Coils,
Ignition Wires / Spark Plugs,
Starter Motor / Solenoid,
Other Engine Electrical and Ignition Products

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
33% OF PURCHASES	16% OF PURCHASES	8% OF PURCHASES	43% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
39%	66%

BATTERIES AND RELATED PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.41 BILLION	$0.43 BILLION	$0.46 BILLION	$0.49 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	40%
Car / Truck Show	2%
Direct from Parts Manufacturer	1%
General Retail Chains	12%
New Vehicle Dealership	9%
Specialty Retailer/Installer	7%
Tire Shop	3%
Other	4%
ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	1%
General Retail Chains	3%
Online Marketplace/Auction Site	2%
Online Only General Retailer	2%
Specialty Retailer/Installer	3%
Tire Shop	<1%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	21%
Upscale Car	8%
Sports Car	4%
Alternative Power	2%
CUV	13%
SUV	15%
Pickup	24%
Van	4%
Classic	1%

EXAMPLE PARTS

Battery Wraps,
Performance/Heavy Duty Battery

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
13% OF PURCHASES	12% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
10% OF PURCHASES	65% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

39%

DIY INSTALLATION SHARE

63%

ENGINE CONTROL AND COMPUTER PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.41 BILLION	$0.43 BILLION	$0.47 BILLION	$0.49 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	17%
Car / Truck Show	4%
Direct from Parts Manufacturer	4%
General Retail Chains	1%
New Vehicle Dealership	17%
Specialty Retailer/Installer	11%
Tire Shop	<1%
Other	<1%
ONLINE	
Auto Parts Chains	7%
Direct from Parts Manufacturer	5%
General Retail Chains	<1%
Online Marketplace/Auction Site	6%
Online Only General Retailer	7%
Specialty Retailer/Installer	18%
Tire Shop	1%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	8%
Mid Range Car	18%
Upscale Car	9%
Sports Car	8%
Alternative Power	1%
CUV	14%
SUV	21%
Pickup	19%
Van	1%
Classic	1%

EXAMPLE PARTS

Engine Management System,
Performance Chip,
Computer / Tuner

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
39% OF PURCHASES	16% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
8% OF PURCHASES	37% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

58%

DIY INSTALLATION SHARE

49%

INTERNAL ENGINE PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.24 BILLION	$1.31 BILLION	$1.36 BILLION	$1.42 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	14%
Car / Truck Show	3%
Direct from Parts Manufacturer	6%
General Retail Chains	2%
New Vehicle Dealership	12%
Specialty Retailer/Installer	10%
Tire Shop	3%
Other	2%

ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	7%
General Retail Chains	1%
Online Marketplace/Auction Site	6%
Online Only General Retailer	7%
Specialty Retailer/Installer	10%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	14%
Upscale Car	11%
Sports Car	13%
Alternative Power	1%
CUV	11%
SUV	13%
Pickup	21%
Van	4%
Classic	8%

EXAMPLE PARTS

Camshaft / Valvetrain, Cylinder Heads, Engine Swap / Crate Engine, Oil Pan / Pump, Gaskets, Pistons, Connecting Rods, Rings, Crankshafts, Other Engine Internal and Cooling Products

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
42% OF PURCHASES	15% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
14% OF PURCHASES	30% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

24%

DIY INSTALLATION SHARE

51%

COOLING SYSTEM PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.31 BILLION	$0.33 BILLION	$0.34 BILLION	$0.35 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	21%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	1%
New Vehicle Dealership	10%
Specialty Retailer/Installer	5%
Tire Shop	2%
Other	3%
ONLINE	
Auto Parts Chains	13%
Direct from Parts Manufacturer	7%
General Retail Chains	3%
Online Marketplace/Auction Site	10%
Online Only General Retailer	6%
Specialty Retailer/Installer	12%
Tire Shop	2%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	10%
Mid Range Car	16%
Upscale Car	5%
Sports Car	6%
Alternative Power	<1%
CUV	15%
SUV	16%
Pickup	24%
Van	4%
Classic	2%

EXAMPLE PARTS

Engine Fan,

Radiator

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
37% OF PURCHASES	20% OF PURCHASES	9% OF PURCHASES	34% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
42%	51%

ENGINE DRESS-UP PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.22 BILLION	$0.22 BILLION	$0.23 BILLION	$0.24 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	22%
Car / Truck Show	3%
Direct from Parts Manufacturer	4%
General Retail Chains	3%
New Vehicle Dealership	8%
Specialty Retailer/Installer	7%
Tire Shop	4%
Other	1%

ONLINE	
Auto Parts Chains	13%
Direct from Parts Manufacturer	5%
General Retail Chains	2%
Online Marketplace/Auction Site	8%
Online Only General Retailer	7%
Specialty Retailer/Installer	12%
Tire Shop	2%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	13%
Upscale Car	8%
Sports Car	9%
Alternative Power	1%
CUV	9%
SUV	16%
Pickup	33%
Van	3%
Classic	4%

EXAMPLE PARTS

Custom Valve Covers,
Performance Plumbing

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
45% OF PURCHASES	11% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
9% OF PURCHASES	35% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

21%

DIY INSTALLATION SHARE

68%

EXHAUST PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.26 BILLION	$1.31 BILLION	$1.38 BILLION	$1.44 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	12%
Car / Truck Show	3%
Direct from Parts Manufacturer	3%
General Retail Chains	5%
New Vehicle Dealership	10%
Specialty Retailer/Installer	13%
Tire Shop	2%
Other	3%
ONLINE	
Auto Parts Chains	12%
Direct from Parts Manufacturer	8%
General Retail Chains	1%
Online Marketplace/Auction Site	7%
Online Only General Retailer	6%
Specialty Retailer/Installer	15%
Tire Shop	<1%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	4%
Mid Range Car	13%
Upscale Car	9%
Sports Car	16%
Alternative Power	1%
CUV	7%
SUV	10%
Pickup	34%
Van	2%
Classic	5%

EXAMPLE PARTS

Catalytic Converter,
Exhaust Headers, Exhaust Kit,
Exhaust Pipe Tip Only

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
45% OF PURCHASES	12% OF PURCHASES	11% OF PURCHASES	32% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
58%	58%

AIR INTAKE PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.64 BILLION	$0.67 BILLION	$0.70 BILLION	$0.73 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	18%
Car / Truck Show	3%
Direct from Parts Manufacturer	3%
General Retail Chains	2%
New Vehicle Dealership	7%
Specialty Retailer/Installer	5%
Tire Shop	1%
Other	1%

ONLINE	
Auto Parts Chains	18%
Direct from Parts Manufacturer	6%
General Retail Chains	1%
Online Marketplace/Auction Site	7%
Online Only General Retailer	9%
Specialty Retailer/Installer	18%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	9%
Mid Range Car	15%
Upscale Car	9%
Sports Car	13%
Alternative Power	1%
CUV	12%
SUV	9%
Pickup	27%
Van	4%
Classic	1%

EXAMPLE PARTS

Cold Air Intake Conversion,
Performance Air Filter Replacement
Intake Manifold

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
49% OF PURCHASES	15% OF PURCHASES	10% OF PURCHASES	27% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
43%	72%

FORCED INDUCTION SYSTEMS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.63 BILLION	$0.66 BILLION	$0.69 BILLION	$0.72 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	7%
Car / Truck Show	3%
Direct from Parts Manufacturer	2%
General Retail Chains	4%
New Vehicle Dealership	11%
Specialty Retailer/Installer	8%
Tire Shop	<1%
Other	<1%
ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	16%
General Retail Chains	2%
Online Marketplace/Auction Site	10%
Online Only General Retailer	12%
Specialty Retailer/Installer	16%
Tire Shop	0%
Other	0%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	21%
Upscale Car	6%
Sports Car	23%
Alternative Power	1%
CUV	1%
SUV	6%
Pickup	27%
Van	<1%
Classic	8%

EXAMPLE PARTS

Nitrous Oxide Kit,
Supercharger, Turbocharger

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
53% OF PURCHASES	11% OF PURCHASES	16% OF PURCHASES	20% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
49%	59%

CARBURETOR AND FUEL SYSTEM PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.47 BILLION	$0.49 BILLION	$0.53 BILLION	$0.55 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	20%
Car / Truck Show	3%
Direct from Parts Manufacturer	5%
General Retail Chains	2%
New Vehicle Dealership	15%
Specialty Retailer/Installer	5%
Tire Shop	3%
Other	2%

ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	6%
General Retail Chains	2%
Online Marketplace/Auction Site	4%
Online Only General Retailer	5%
Specialty Retailer/Installer	11%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	5%
Mid Range Car	19%
Upscale Car	6%
Sports Car	7%
Alternative Power	1%
CUV	9%
SUV	10%
Pickup	33%
Van	4%
Classic	7%

EXAMPLE PARTS

Carburetor, Fuel Injectors,
Fuel Pressure Regulators,
Fuel Pump / Rails, Fuel Tank / Cells,
Other Intake / Fuel / Exhaust Products

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
37% OF PURCHASES	15% OF PURCHASES	12% OF PURCHASES	36% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
48%	63%

ROLL CAGE AND SAFETY PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.34 BILLION	$0.35 BILLION	$0.36 BILLION	$0.36 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	11%
Car / Truck Show	4%
Direct from Parts Manufacturer	4%
General Retail Chains	4%
New Vehicle Dealership	16%
Specialty Retailer/Installer	8%
Tire Shop	9%
Other	2%
ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	7%
General Retail Chains	2%
Online Marketplace/Auction Site	4%
Online Only General Retailer	7%
Specialty Retailer/Installer	11%
Tire Shop	3%
Other	<1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	17%
Upscale Car	10%
Sports Car	8%
Alternative Power	3%
CUV	14%
SUV	14%
Pickup	21%
Van	2%
Classic	5%

EXAMPLE PARTS

Fire Extinguisher, Roll Cage / Bar,
Seat Belts / Harnesses / Restraints,
Other Safety Gear

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
31% OF PURCHASES	20% OF PURCHASES	19% OF PURCHASES	29% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

46%

DIY INSTALLATION SHARE

54%

RACING AND PROTECTION APPAREL

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.13 BILLION	$0.14 BILLION	$0.14 BILLION	$0.14 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	7%
Car / Truck Show	8%
Direct from Parts Manufacturer	3%
General Retail Chains	5%
New Vehicle Dealership	20%
Specialty Retailer/Installer	4%
Tire Shop	1%
Other	0%

ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	10%
General Retail Chains	3%
Online Marketplace/Auction Site	5%
Online Only General Retailer	8%
Specialty Retailer/Installer	14%
Tire Shop	2%
Other	0%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	9%
Mid Range Car	14%
Upscale Car	16%
Sports Car	11%
Alternative Power	3%
CUV	16%
SUV	13%
Pickup	9%
Van	7%
Classic	2%

EXAMPLE PARTS

Head Protection,
Racing Suit, Shoes, Gloves

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
43% OF PURCHASES	24% OF PURCHASES	17% OF PURCHASES	16% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
36%	67%

SUSPENSION PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$2.14 BILLION	$2.21 BILLION	$2.32 BILLION	$2.42 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	14%
Car / Truck Show	3%
Direct from Parts Manufacturer	2%
General Retail Chains	2%
New Vehicle Dealership	10%
Specialty Retailer/Installer	9%
Tire Shop	5%
Other	1%

ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	7%
General Retail Chains	1%
Online Marketplace/Auction Site	6%
Online Only General Retailer	9%
Specialty Retailer/Installer	16%
Tire Shop	2%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	4%
Mid Range Car	12%
Upscale Car	8%
Sports Car	6%
Alternative Power	1%
CUV	8%
SUV	18%
Pickup	37%
Van	2%
Classic	4%

EXAMPLE PARTS

Air Suspension System, Lift Kits, Shocks, Coil Springs / Coil Overs, Leaf Springs, Control / Trailing Arms, Lowering Kits, Leveling Kits, Other Suspension / Brakes / Steering Products

ORDERED ONLINE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
44% OF PURCHASES	15% OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
11% OF PURCHASES	30% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

57%

DIY INSTALLATION SHARE

54%

BRAKE PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.89 BILLION	$1.95 BILLION	$2.04 BILLION	$2.12 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	34%
Car / Truck Show	1%
Direct from Parts Manufacturer	2%
General Retail Chains	2%
New Vehicle Dealership	10%
Specialty Retailer/Installer	8%
Tire Shop	5%
Other	1%
ONLINE	
Auto Parts Chains	14%
Direct from Parts Manufacturer	3%
General Retail Chains	2%
Online Marketplace/Auction Site	4%
Online Only General Retailer	5%
Specialty Retailer/Installer	8%
Tire Shop	1%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	20%
Upscale Car	9%
Sports Car	9%
Alternative Power	1%
CUV	12%
SUV	14%
Pickup	21%
Van	6%
Classic	2%

EXAMPLE PARTS

Performance Brakes (e.g., Calipers, Rotors, etc.), Brake Pads

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
25% OF PURCHASES	14% OF PURCHASES	10% OF PURCHASES	50% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

53%

DIY INSTALLATION SHARE

56%

STEERING PRODUCTS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$0.28 BILLION	$0.29 BILLION	$0.29 BILLION	$0.30 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	20%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	1%
New Vehicle Dealership	11%
Specialty Retailer/Installer	5%
Tire Shop	3%
Other	1%

ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	6%
General Retail Chains	1%
Online Marketplace/Auction Site	7%
Online Only General Retailer	6%
Specialty Retailer/Installer	21%
Tire Shop	1%
Other	0%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	6%
Mid Range Car	19%
Upscale Car	7%
Sports Car	12%
Alternative Power	1%
CUV	13%
SUV	12%
Pickup	23%
Van	3%
Classic	4%

EXAMPLE PARTS

Steering Columns,
Steering Wheels,
Sway Bars

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
42% OF PURCHASES	16% OF PURCHASES	10% OF PURCHASES	33% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
49%	55%

PERFORMANCE / SPECIAL PURPOSE TIRES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$2.22 BILLION	$2.35 BILLION	$2.46 BILLION	$2.54 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	10%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	6%
New Vehicle Dealership	15%
Specialty Retailer/Installer	8%
Tire Shop	29%
Other	1%

ONLINE	
Auto Parts Chains	4%
Direct from Parts Manufacturer	3%
General Retail Chains	3%
Online Marketplace/Auction Site	2%
Online Only General Retailer	3%
Specialty Retailer/Installer	4%
Tire Shop	7%
Other	1%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	4%
Mid Range Car	19%
Upscale Car	10%
Sports Car	16%
Alternative Power	1%
CUV	11%
SUV	14%
Pickup	19%
Van	4%
Classic	2%

EXAMPLE PARTS

Snow / Winter Tires,
Low Profile Tires, Performance Tires,
Reproduction / Vintage Tires,
Other Wheel / Tire Products

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
16% OF PURCHASES	15% OF PURCHASES	12% OF PURCHASES	58% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
59%	23%

OFF-ROAD / PLUS SIZE TIRES

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.62 BILLION	$1.69 BILLION	$1.78 BILLION	$1.88 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	3%
Car / Truck Show	1%
Direct from Parts Manufacturer	1%
General Retail Chains	2%
New Vehicle Dealership	9%
Specialty Retailer/Installer	9%
Tire Shop	36%
Other	2%
ONLINE	
Auto Parts Chains	3%
Direct from Parts Manufacturer	5%
General Retail Chains	2%
Online Marketplace/Auction Site	3%
Online Only General Retailer	5%
Specialty Retailer/Installer	6%
Tire Shop	11%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	<1%
Mid Range Car	1%
Upscale Car	<1%
Sports Car	<1%
Alternative Power	<1%
CUV	5%
SUV	22%
Pickup	69%
Van	1%
Classic	0%

EXAMPLE PARTS

Off-Road / Plus-Sized Tires

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
23% OF PURCHASES	16% OF PURCHASES	9% OF PURCHASES	52% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

72%

DIY INSTALLATION SHARE

25%

CUSTOM WHEELS

Source: 2019 SEMA US Market Data

2016 MARKET SIZE	2017 MARKET SIZE	2018 MARKET SIZE	2019 MARKET SIZE
$1.21 BILLION	$1.26 BILLION	$1.32 BILLION	$1.32 BILLION

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	4%
Car / Truck Show	2%
Direct from Parts Manufacturer	1%
General Retail Chains	2%
New Vehicle Dealership	13%
Specialty Retailer/Installer	8%
Tire Shop	20%
Other	3%

ONLINE	
Auto Parts Chains	7%
Direct from Parts Manufacturer	7%
General Retail Chains	1%
Online Marketplace/Auction Site	7%
Online Only General Retailer	7%
Specialty Retailer/Installer	11%
Tire Shop	8%
Other	2%

VEHICLE SEGMENT – SHARE OF DOLLARS

Small Car	3%
Mid Range Car	17%
Upscale Car	10%
Sports Car	6%
Alternative Power	<1%
CUV	8%
SUV	13%
Pickup	40%
Van	1%
Classic	2%

EXAMPLE PARTS

Aluminium or Alloy Wheels,
Carbon Fiber or Composite Wheels,
Beadlock Conversion Kit,
Steel Wheels, Wheel Covers/Hubcaps

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
35% OF PURCHASES	19% OF PURCHASES	8% OF PURCHASES	38% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH

48%

DIY INSTALLATION SHARE

38%

SMALL CAR

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$2.53 BILLION	5% OF SALES	28.6 MILLION	44% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	22%
Car / Truck Show	2%
Direct from Parts Manufacturer	1%
General Retail Chains	7%
New Vehicle Dealership	9%
Specialty Retailer/Installer	8%
Tire Shop	7%
Other	2%

ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	4%
General Retail Chains	3%
Online Marketplace/Auction Site	4%
Online Only General Retailer	7%
Specialty Retailer/Installer	13%
Tire Shop	1%
Other	<1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	24%
Driver Assist Systems	2%
Drivetrain	16%
Engine Electrical and Ignition	7%
Engine Internal and Cooling	4%
Exterior Body	10%
Exterior Utility	1%
Intake / Fuel / Exhaust	9%
Interior	5%
Lighting	4%
Mobile Electronics	8%
Safety Gear	2%
Suspension / Brakes / Steering	10%
Wheels / Tires	6%

EXAMPLE VEHICLES

Chevrolet Cruze, Ford Focus, Hyundai Elantra, Mistubishi Lancer, Pontiac Sunfire, Toyota Corolla

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
35% OF PURCHASES	12% OF PURCHASES	11% OF PURCHASES	42% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
25%	58%

MID RANGE CAR

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$7.10 BILLION	15% OF SALES	61.0 MILLION	43% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	20%
Car / Truck Show	2%
Direct from Parts Manufacturer	2%
General Retail Chains	6%
New Vehicle Dealership	12%
Specialty Retailer/Installer	9%
Tire Shop	5%
Other	2%

ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	3%
General Retail Chains	4%
Online Marketplace/Auction Site	5%
Online Only General Retailer	10%
Specialty Retailer/Installer	6%
Tire Shop	1%
Other	1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	19%
Driver Assist Systems	2%
Drivetrain	6%
Engine Electrical and Ignition	5%
Engine Internal and Cooling	4%
Exterior Body	11%
Exterior Utility	1%
Intake / Fuel / Exhaust	7%
Interior	7%
Lighting	5%
Mobile Electronics	10%
Safety Gear	1%
Suspension / Brakes / Steering	11%
Wheels / Tires	10%

EXAMPLE VEHICLES

Buick LeSabre, Dodge Charger, Ford Fusion, Honda Civic, Toyota Camry, Volkswagen Jetta

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
34% OF PURCHASES	14% OF PURCHASES	10% OF PURCHASES	43% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
31%	58%

UPSCALE CAR

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$3.48 BILLION	8% OF SALES	16.4 MILLION	53% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	17%
Car / Truck Show	4%
Direct from Parts Manufacturer	3%
General Retail Chains	6%
New Vehicle Dealership	14%
Specialty Retailer/Installer	8%
Tire Shop	5%
Other	1%

ONLINE	
Auto Parts Chains	8%
Direct from Parts Manufacturer	5%
General Retail Chains	3%
Online Marketplace/Auction Site	5%
Online Only General Retailer	8%
Specialty Retailer/Installer	10%
Tire Shop	1%
Other	1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	17%
Driver Assist Systems	2%
Drivetrain	6%
Engine Electrical and Ignition	4%
Engine Internal and Cooling	5%
Exterior Body	12%
Exterior Utility	1%
Intake / Fuel / Exhaust	6%
Interior	6%
Lighting	5%
Mobile Electronics	9%
Safety Gear	1%
Suspension / Brakes / Steering	12%
Wheels / Tires	11%

EXAMPLE VEHICLES

Acura TL, BMW 3-Series,
Cadillac CTS, Ferrari California,
Mercedes C-Class, Maserati Ghibli

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
33% OF PURCHASES	15% OF PURCHASES	13% OF PURCHASES	39% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
32%	52%

SPORTS CAR

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$3.51 BILLION	8% OF SALES	9.9 MILLION	60% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	16%
Car / Truck Show	3%
Direct from Parts Manufacturer	3%
General Retail Chains	6%
New Vehicle Dealership	8%
Specialty Retailer/Installer	7%
Tire Shop	6%
Other	2%

ONLINE	
Auto Parts Chains	11%
Direct from Parts Manufacturer	6%
General Retail Chains	2%
Online Marketplace/Auction Site	6%
Online Only General Retailer	9%
Specialty Retailer/Installer	11%
Tire Shop	2%
Other	1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	15%
Driver Assist Systems	<1%
Drivetrain	6%
Engine Electrical and Ignition	3%
Engine Internal and Cooling	6%
Exterior Body	15%
Exterior Utility	<1%
Intake / Fuel / Exhaust	15%
Interior	4%
Lighting	4%
Mobile Electronics	4%
Safety Gear	1%
Suspension / Brakes / Steering	11%
Wheels / Tires	14%

EXAMPLE VEHICLES

Chevrolet Camaro, Corvette, Dodge Challenger, Ford Mustang, Mazda MX5 Miata, Subaru WRX

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
38% OF PURCHASES	14% OF PURCHASES	10% OF PURCHASES	38% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
45%	63%

ALTERNATIVE POWER

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$0.43 BILLION	1% OF SALES	3.3 MILLION	45% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	12%
Car / Truck Show	4%
Direct from Parts Manufacturer	3%
General Retail Chains	6%
New Vehicle Dealership	15%
Specialty Retailer/Installer	7%
Tire Shop	12%
Other	2%

ONLINE	
Auto Parts Chains	6%
Direct from Parts Manufacturer	4%
General Retail Chains	2%
Online Marketplace/Auction Site	6%
Online Only General Retailer	10%
Specialty Retailer/Installer	9%
Tire Shop	2%
Other	<1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	17%
Driver Assist Systems	2%
Drivetrain	7%
Engine Electrical and Ignition	5%
Engine Internal and Cooling	1%
Exterior Body	15%
Exterior Utility	3%
Intake / Fuel / Exhaust	6%
Interior	7%
Lighting	4%
Mobile Electronics	8%
Safety Gear	4%
Suspension / Brakes / Steering	13%
Wheels / Tires	4%

EXAMPLE VEHICLES

BMW i8, Chevrolet Volt,
Ford C-Max, Lexus RX450h,
Tesla Model X, Toyota Prius

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
25% OF PURCHASES	22% OF PURCHASES	15% OF PURCHASES	38% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
38%	50%

CUV

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$5.90 BILLION	13% OF SALES	49.6 MILLION	44% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	16%
Car / Truck Show	2%
Direct from Parts Manufacturer	3%
General Retail Chains	6%
New Vehicle Dealership	19%
Specialty Retailer/Installer	8%
Tire Shop	5%
Other	1%

ONLINE	
Auto Parts Chains	8%
Direct from Parts Manufacturer	5%
General Retail Chains	3%
Online Marketplace/Auction Site	8%
Online Only General Retailer	7%
Specialty Retailer/Installer	6%
Tire Shop	2%
Other	0%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	15%
Driver Assist Systems	3%
Drivetrain	4%
Engine Electrical and Ignition	4%
Engine Internal and Cooling	4%
Exterior Body	13%
Exterior Utility	6%
Intake / Fuel / Exhaust	4%
Interior	9%
Lighting	7%
Mobile Electronics	9%
Safety Gear	1%
Suspension / Brakes / Steering	8%
Wheels / Tires	8%

EXAMPLE VEHICLES

Chevrolet Equinox, Ford Escape,
Honda CR-V, Nissan Rogue,
Subaru Forester, Toyota RAV4

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
32% OF PURCHASES	16% OF PURCHASES	10% OF PURCHASES	43% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
38%	53%

SUV

Source: 2019 SEMA US Market Data

MARKET SIZE
$6.35
BILLION

SHARE OF MARKET
14%
OF SALES

NUMBER OF VEHICLES
33.8
MILLION

ENTHUSIASTS
45%
OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	21%
Car / Truck Show	1%
Direct from Parts Manufacturer	3%
General Retail Chains	8%
New Vehicle Dealership	12%
Specialty Retailer/Installer	7%
Tire Shop	6%
Other	1%

ONLINE	
Auto Parts Chains	9%
Direct from Parts Manufacturer	4%
General Retail Chains	3%
Online Marketplace/Auction Site	5%
Online Only General Retailer	11%
Specialty Retailer/Installer	8%
Tire Shop	1%
Other	1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	14%
Driver Assist Systems	1%
Drivetrain	4%
Engine Electrical and Ignition	5%
Engine Internal and Cooling	5%
Exterior Body	12%
Exterior Utility	6%
Intake / Fuel / Exhaust	5%
Interior	4%
Lighting	5%
Mobile Electronics	7%
Safety Gear	1%
Suspension / Brakes / Steering	12%
Wheels / Tires	15%

EXAMPLE VEHICLES

Cadillac Escalade, Chevrolet Tahoe, Dodge Durango, Jeep Wrangler, Lincoln Navigator, Porsche Cayenne

ORDERED ONLINE

SHIPPED TO HOME
33%
OF PURCHASES

IN-STORE PICKUP/ INSTALL
14%
OF PURCHASES

ORDERED IN-STORE

SHIPPED TO HOME
9%
OF PURCHASES

IN-STORE PICKUP/ INSTALL
44%
OF PURCHASES

MANUFACTURERS WITH SALES GROWTH
48%

DIY INSTALLATION SHARE
63%

PICKUP

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$14.28 BILLION	31% OF SALES	56.2 MILLION	46% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	22%
Car / Truck Show	1%
Direct from Parts Manufacturer	2%
General Retail Chains	8%
New Vehicle Dealership	7%
Specialty Retailer/Installer	9%
Tire Shop	5%
Other	2%

ONLINE	
Auto Parts Chains	10%
Direct from Parts Manufacturer	4%
General Retail Chains	2%
Online Marketplace/Auction Site	6%
Online Only General Retailer	10%
Specialty Retailer/Installer	9%
Tire Shop	2%
Other	1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	14%
Driver Assist Systems	1%
Drivetrain	9%
Engine Electrical and Ignition	3%
Engine Internal and Cooling	3%
Exterior Body	10%
Exterior Utility	17%
Intake / Fuel / Exhaust	8%
Interior	4%
Lighting	4%
Mobile Electronics	4%
Safety Gear	1%
Suspension / Brakes / Steering	10%
Wheels / Tires	16%

EXAMPLE VEHICLES

Chevrolet Silverado, Dodge Dakota, Ford F-Series, Nissan Titan, RAM 1500/2500/3500, Toyota Tacoma

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
37% OF PURCHASES	9% OF PURCHASES	8% OF PURCHASES	46% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
59%	69%

VAN

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$1.73 BILLION	4% OF SALES	17.3 MILLION	35% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	21%
Car / Truck Show	3%
Direct from Parts Manufacturer	4%
General Retail Chains	9%
New Vehicle Dealership	13%
Specialty Retailer/Installer	5%
Tire Shop	5%
Other	3%

ONLINE	
Auto Parts Chains	10%
Direct from Parts Manufacturer	4%
General Retail Chains	2%
Online Marketplace/Auction Site	5%
Online Only General Retailer	9%
Specialty Retailer/Installer	3%
Tire Shop	2%
Other	1%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	16%
Driver Assist Systems	3%
Drivetrain	4%
Engine Electrical and Ignition	5%
Engine Internal and Cooling	4%
Exterior Body	10%
Exterior Utility	5%
Intake / Fuel / Exhaust	5%
Interior	7%
Lighting	5%
Mobile Electronics	12%
Safety Gear	1%
Suspension / Brakes / Steering	11%
Wheels / Tires	8%

EXAMPLE VEHICLES

Chevrolet Express, Dodge Grand Caravan,
Ford Transit, Honda Odyssey,
Kia Sedona, Toyota Sienna

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
29% OF PURCHASES	13% OF PURCHASES	9% OF PURCHASES	49% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
30%	59%

CLASSIC

Source: 2019 SEMA US Market Data

MARKET SIZE	SHARE OF MARKET	NUMBER OF VEHICLES	ENTHUSIASTS
$0.89 BILLION	2% OF SALES	4.0 MILLION	70% OF OWNERS

SALES CHANNEL – SHARE OF DOLLARS

PHYSICAL LOCATION	
Auto Parts Chains	18%
Car / Truck Show	2%
Direct from Parts Manufacturer	1%
General Retail Chains	2%
New Vehicle Dealership	2%
Specialty Retailer/Installer	10%
Tire Shop	2%
Other	2%

ONLINE	
Auto Parts Chains	17%
Direct from Parts Manufacturer	5%
General Retail Chains	1%
Online Marketplace/Auction Site	6%
Online Only General Retailer	5%
Specialty Retailer/Installer	26%
Tire Shop	<1%
Other	2%

PART CATEGORY – SHARE OF DOLLARS

Chemicals	10%
Driver Assist Systems	<1%
Drivetrain	15%
Engine Electrical and Ignition	3%
Engine Internal and Cooling	12%
Exterior Body	3%
Exterior Utility	2%
Intake / Fuel / Exhaust	16%
Interior	5%
Lighting	1%
Mobile Electronics	1%
Safety Gear	2%
Suspension / Brakes / Steering	17%
Wheels / Tires	10%

EXAMPLE VEHICLES

1969 Chevrolet Camaro, 1955 Ford Thunderbird, 1964 Pontiac GTO, 1968 Porsche 911, 1939 Studebaker Champion

ORDERED ONLINE		ORDERED IN-STORE	
SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL	SHIPPED TO HOME	IN-STORE PICKUP/ INSTALL
57% OF PURCHASES	8% OF PURCHASES	8% OF PURCHASES	28% OF PURCHASES

MANUFACTURERS WITH SALES GROWTH	DIY INSTALLATION SHARE
38%	84%

OVERVIEW

While the main portion of this report focuses on the sales aspects of the market, understanding the consumer is crucial for effectively developing and selling your products. As such, this section utilizes the data from the SEMA Consumer Market Data project to profile buyers of automotive parts and accessories in 2019.

As is consistently the case in prior research, SEMA finds that there are still many young people who enjoy accessorizing their vehicles. In fact, younger drivers are more likely than older drivers to buy performance parts or accessories and make heavier modifications to their vehicles. They continue to be an important and engaged part of our industry.

Online shopping has become a big part of the specialty automotive aftermarket, particularly for younger consumers. However, the relationship between digital and brick-and-mortar retail is not always antagonistic. Accessorizers often rely on the web for research and information, but a solid majority of parts are purchased or picked up in-store. A robust online and social media presence can actually help companies to reach and connect with potential and existing customers.

Accessorizers are also nearly twice as likely as other drivers to own other vehicles, such as powersports, RVs, boats or motorcycles. These other vehicle pursuits offer strong cross-selling, cross-promotion and marketing messaging opportunities for our members.

ACCESSORIZER PROFILE: HOW THE VEHICLE IS USED

Most accessorized vehicles are still daily drivers, and are often used for errands or commuting. Classics are the main exception. As one might expect, these are instead driven occasionally and many are shown off at car shows. Sports cars sit somewhere in the middle: more than half are used for daily activities, but some are kept as collector pieces or track/race vehicles.

HOW THE VEHICLE IS USED % OF ACCESSORIZERS' VEHICLES

Source: 2019 SEMA US Market Data

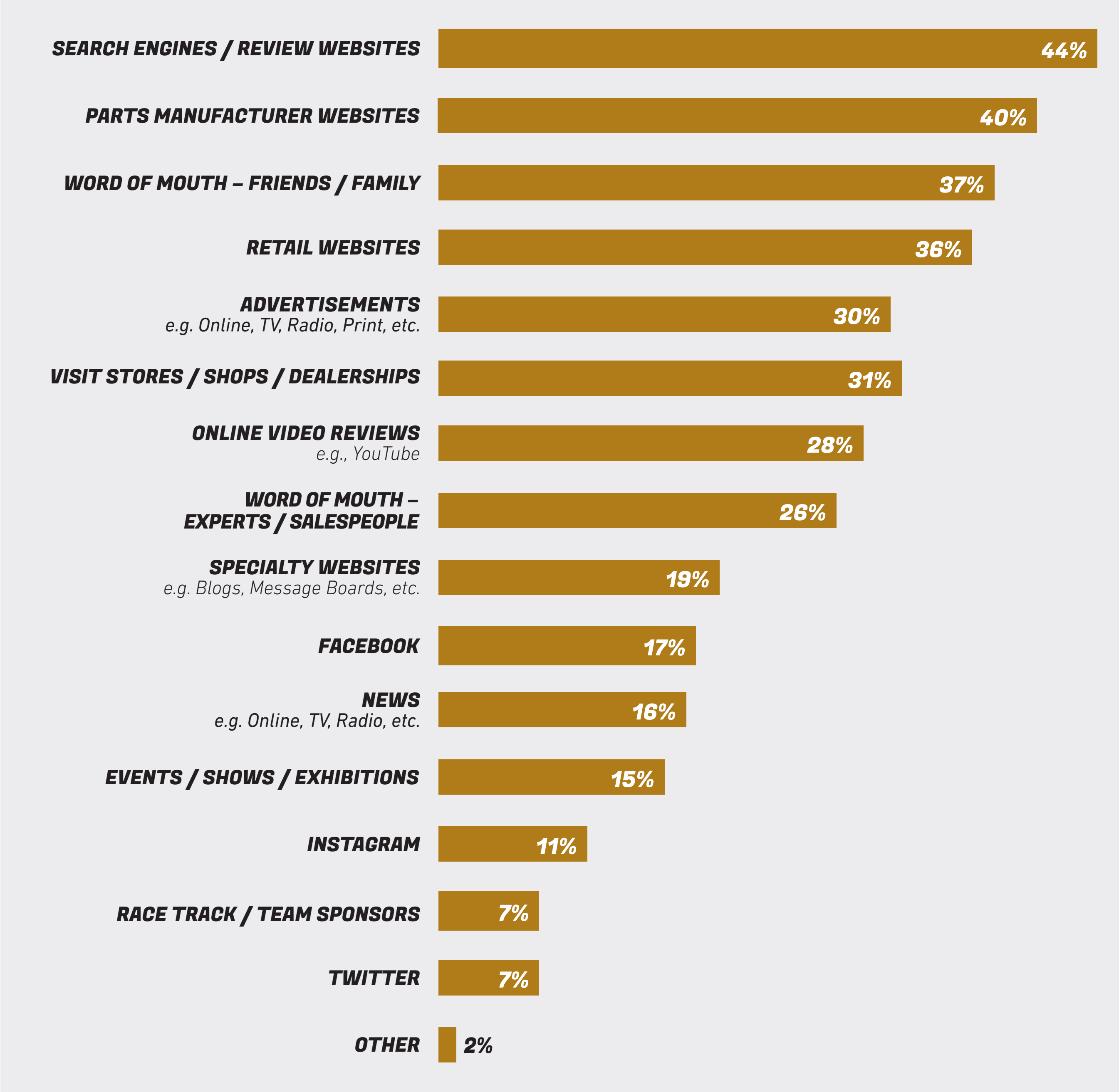
	TOTAL VEHICLES	SMALL CAR	MID RANGE CAR	UPSCALE CAR	SPORTS CAR	ALTERNATIVE POWER	CUV	SUV	PICKUP	VAN	CLASSIC
Running Errands	73%	79%	80%	64%	54%	71%	80%	73%	71%	76%	9%
Commuting	65%	72%	73%	61%	50%	66%	73%	65%	62%	59%	5%
Pleasure Driving	62%	59%	61%	67%	72%	54%	62%	68%	57%	57%	54%
Work Use	48%	46%	48%	42%	34%	43%	44%	47%	60%	45%	4%
Off-Road	14%	5%	3%	6%	6%	10%	9%	25%	29%	6%	1%
Collector Vehicle	9%	8%	6%	14%	26%	9%	6%	8%	6%	5%	67%
Car Shows	6%	4%	4%	9%	25%	5%	4%	6%	4%	2%	47%
Track Days	6%	7%	5%	10%	19%	9%	5%	5%	4%	3%	8%
Dedicated Racing Vehicle	5%	4%	4%	8%	15%	6%	6%	4%	3%	2%	5%
Non-Operational	2%	2%	2%	3%	4%	2%	<1%	2%	2%	1%	21%

ACCESSORIZER PROFILE: WHERE CONSUMERS LOOK FOR PARTS INFORMATION

Accessorizers tend to use multiple sources when looking for parts information, and are most likely to look online as well as consult with people they know. It is, therefore, a good idea for businesses to make sure that their web presence includes sufficient product information to help their customers make an informed decision. Social media and YouTube are less common for research purposes, but can help reach potential customers and inform them about the brand and even how to properly install/use the company's products.

WHERE CONSUMERS LOOK FOR PARTS INFO % ACCESSORIZERS

Source: 2019 SEMA US Market Data

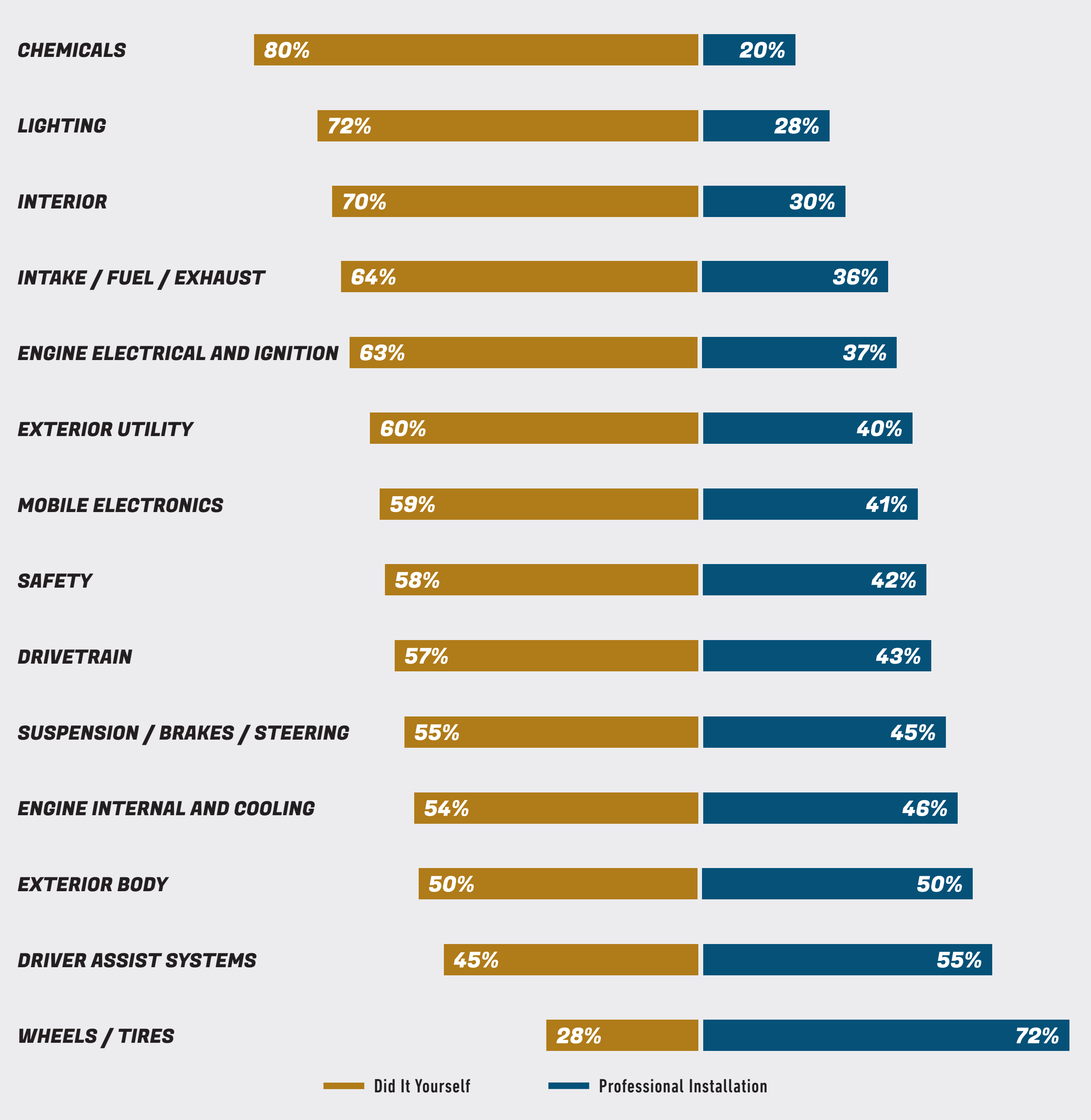


ACCESSORIZER PROFILE: HOW PARTS AND ACCESSORIES ARE INSTALLED

Consumers are more comfortable installing and applying simpler products themselves, such as chemicals, but are more likely to rely on others for more complex upgrades.

HOW PARTS AND ACCESSORIES ARE INSTALLED % OF PART PURCHASES

Source: 2019 SEMA US Market Data



ACCESSORIZER PROFILE: AGE

Accessorizers skew young. More than half of people modifying their vehicle are under age 40, and people grow less likely to buy aftermarket parts as they age.

AGE % OF TOTAL VEHICLE OWNERS

Source: 2019 SEMA US Market Data

	TOTAL VEHICLE OWNERS	ACCESSORIZERS	NON-ACCESSORIZERS
16–29	23%	31%	20%
30–39	19%	28%	15%
40–49	16%	20%	15%
50–59	15%	12%	16%
60+	27%	9%	34%

ACCESSORIZER PROFILE: WHERE PARTS ARE BOUGHT

Older accessorizers are more likely to favor the traditional in-store shopping experience, however brick-and-mortar retail is where the majority of parts are bought across all age groups. After accounting for online ordering for in-store pickup, even those under age 30 go to the store for close to two-thirds of their parts purchases.

WHERE PARTS ARE BOUGHT % OF PART PURCHASES

Source: 2019 SEMA US Market Data

	TOTAL ACCESSORIZERS	AGES 16–29	AGES 30–39	AGES 40–49	AGES 50–59	AGES 60+
Ordered Online, Shipped to Home	34%	38%	34%	32%	32%	22%
Ordered Online, Picked Up/Installed In-Store	13%	13%	14%	12%	10%	15%
Ordered In-Store, Shipped to Home	10%	10%	10%	10%	9%	7%
Ordered In-Store, Picked Up/Installed In-Store	43%	40%	41%	46%	49%	56%

ACCESSORIZER PROFILE: WHAT PART TYPES ARE BOUGHT

Younger accessorizers are more likely to make more extensive changes to their vehicle, and thus buy more parts. They are more likely to make changes to the vehicle's body, interior, and lighting, but are also braver with regard to performance-oriented "under-the-hood" modifications. Note, however, that consumers make a wide variety of changes to their vehicles, and even older accessorizers still buy from all categories.

PART CATEGORIES INSTALLED % OF ACCESSORIZERS' VEHICLES

Source: 2019 SEMA US Market Data

	TOTAL ACCESSORIZERS	AGES 16–29	AGES 30–39	AGES 40–49	AGES 50–59	AGES 60+
Chemicals	23%	22%	21%	23%	27%	22%
Drivetrain	5%	7%	6%	4%	3%	2%
Engine Electrical and Ignition	13%	15%	12%	13%	13%	12%
Engine Internal and Cooling	8%	10%	8%	9%	4%	5%
Exterior Body	24%	27%	24%	23%	19%	17%
Exterior Utility	13%	10%	14%	14%	15%	14%
Intake / Fuel / Exhaust	11%	13%	10%	10%	8%	6%
Interior	15%	17%	16%	12%	12%	9%
Lighting*	17%	21%	17%	15%	12%	10%
Mobile Electronics	14%	17%	16%	13%	9%	8%
Driver Assist Systems	7%	7%	8%	7%	4%	4%
Safety Gear	4%	4%	5%	4%	2%	2%
Suspension / Brakes / Steering	18%	19%	19%	20%	16%	13%
Wheels / Tires*	16%	19%	16%	16%	11%	7%

**Note: Excludes Standard Replacement Lightbulbs, All-Season Tires.*

ACCESSORIZER PROFILE: WHAT TYPES OF VEHICLES ARE OWNED

Accessorizers are more likely to own pickups, upscale cars and sports cars than the rest of the population. They also own more classics. But all types of vehicles get modified, even if certain vehicle segments are more popular.

VEHICLE OWNERSHIP DISTRIBUTION % OF TOTAL U.S. VEHICLES

Source: 2019 SEMA US Market Data

	TOTAL VEHICLE OWNERS	ACCESSORIZERS	NON-ACCESSORIZERS
Small Car	10%	8%	11%
Mid Range Car	21%	19%	22%
Upscale Car	6%	7%	5%
Sports Car	3%	5%	3%
Alternative Power	1%	1%	1%
CUV	18%	15%	19%
SUV	13%	15%	12%
Pickup	20%	23%	19%
Van	6%	5%	6%
Classic	1%	2%	1%

Accessorizers across every age group own a wide range of vehicle types. Older consumers are somewhat more likely to own a pickup, while younger ones are more likely to have a mid range car. Classic ('73 models and earlier) cars are rare and more commonly owned by older accessorizers.

VEHICLE OWNERSHIP DISTRIBUTION BY AGE % OF ACCESSORIZERS' VEHICLES

Source: 2019 SEMA US Market Data

	TOTAL ACCESSORIZERS	AGES 16–29	AGES 30–39	AGES 40–49	AGES 50–59	AGES 60+
Small Car	8%	10%	7%	6%	6%	7%
Mid Range Car	19%	23%	19%	17%	15%	15%
Upscale Car	7%	9%	8%	6%	7%	5%
Sports Car	5%	6%	4%	4%	3%	3%
Alternative Power	1%	1%	1%	1%	<1%	1%
CUV	15%	13%	17%	17%	15%	16%
SUV	15%	13%	15%	16%	18%	13%
Pickup	23%	20%	22%	24%	27%	27%
Van	5%	4%	5%	6%	6%	8%
Classic	2%	1%	1%	2%	4%	4%

ACCESSORIZER PROFILE: BUYER TYPES

With the "SEMA Consumer Segmentation Report" we developed a framework of six distinct types of specialty-equipment buyers. Subsequently, we can evaluate these buyer segments in all our consumer survey work. These six types contain both "enthusiast" and "non-enthusiast" buyer types. Enthusiasts buy more parts, are more engaged in our industry and make more daring modifications. However, non-enthusiasts actually represent the majority of our industry's consumer base.

ENTHUSIAST BUYER TYPES

BUILDER: Buys parts because they enjoy working on their vehicle.

DRIVER: Buys parts to maximize the fun of driving.

IN-CROWD: Buys parts to make their vehicle stand out.

NON-ENTHUSIAST BUYER TYPES

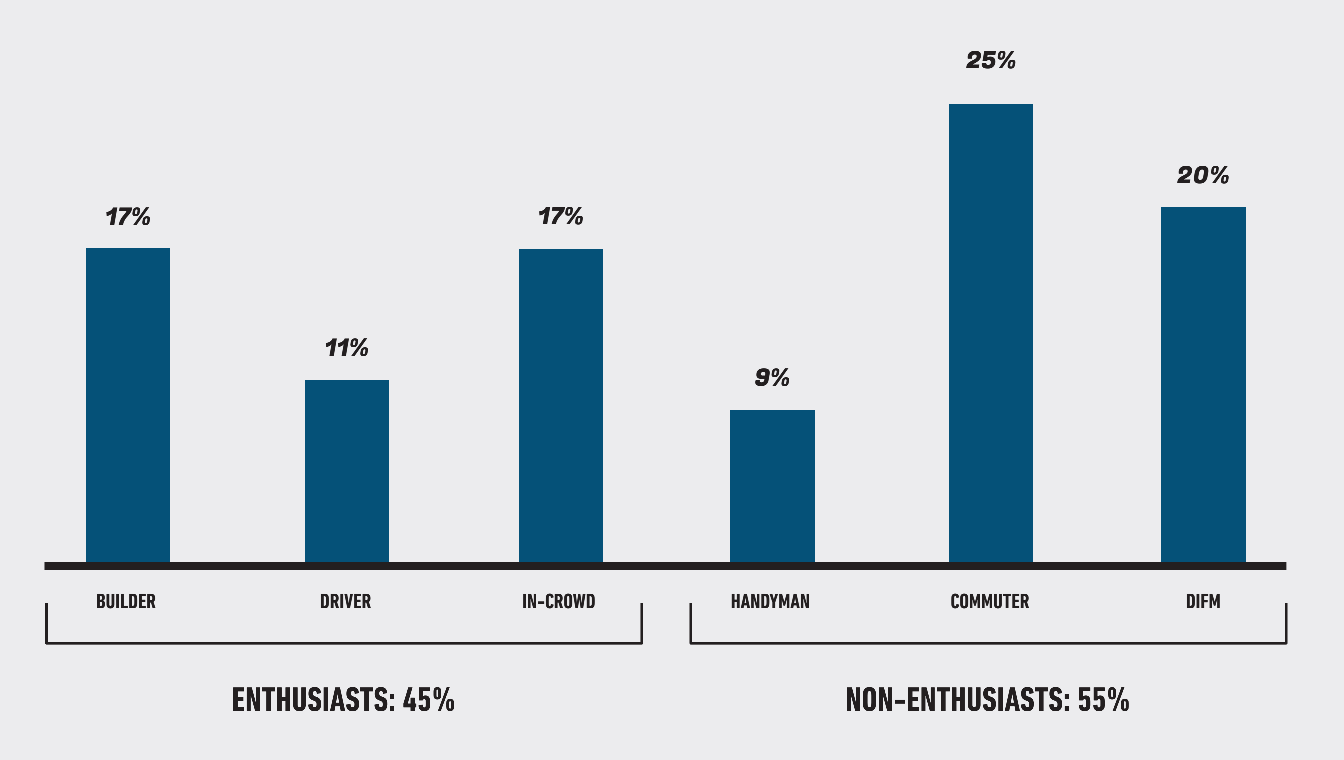
HANDYMAN: Buys parts to upgrade when performing repairs or maintenance.

COMMUTER: Buys parts to maximize driver comfort and mild personalization.

DIFM: "Do-it-for-me" buyers who prefer leaving the installation to professionals.

BUYER TYPES % ACCESSORIZERS

Source: 2019 SEMA US Market Data



For more information on these buyer types, download the "SEMA Consumer Segmentation Report" at: **www.sema.org/research**.

ACCESSORIZER PROFILE: OWNERSHIP OF SPORTS/RECREATIONAL EQUIPMENT

Accessorizers in the United States are almost twice as likely than the rest of the population to own recreational or off-road equipment, especially ATVs, RVs, motorboats and motorcycles.

OWNERSHIP OF SPORTS / RECREATIONAL EQUIPMENT % OF TOTAL U.S. POPULATION

Source: 2019 SEMA US Market Data

	TOTAL VEHICLE OWNERS	ACCESSORIZERS	NON-ACCESSORIZERS
OWN AT LEAST ONE	**34%**	**51%**	**27%**
ATV / Quad Runner	10%	16%	7%
RV / Camper / Motorhome	8%	11%	7%
Motorboat	7%	11%	5%
On-Road / Dual-Purpose Motorcycle	6%	10%	5%
Scooter	6%	9%	4%
Golf Cart	6%	9%	4%
Off-Road Motorcycle	5%	10%	3%
Go Kart	4%	8%	3%
Personal Watercraft	4%	8%	3%
UTV / Side-by-Side	3%	4%	2%
Snowmobile	3%	5%	2%
Dune Buggy	2%	4%	1%
Sailboat	2%	3%	1%
Other	1%	1%	1%

OVERVIEW

Overall, 2019 was a strong year for the U.S. economy and our industry. The economy continued its historic growth, capping its longest period of expansion in U.S. history. Confidence was high, consumers were spending money, and unemployment was at a historic low.

Unfortunately, much of these gains last year have been overshadowed by the COVID-19 outbreak. Preliminary economic data from Q1 2020 shows that the economy has declined 5%, consumer sentiment has dropped, and unemployment has risen. Because of state restrictions, consumers have been staying at home for the past few months and focusing only on essential items, which has slowed spending. However, most economists think that the recession hit its lowest point in mid-April, and that the economy will experience robust growth after Q2 2020. Likewise, as restrictions start to lift, consumers will get more comfortable spending money.

Where is the economy heading in the future? That question is hard to answer, as the current disruption is unprecedented. Unlike the Great Recession from 2008–2009, the current economic slowdown is not driven by market conditions, but rather regulations aimed at containing and mitigating the spread of the virus. Does that mean once the lockdown is over the country will snap back to the way it was? The recovery is likely to be slower than the initial drop. It will certainly improve once restrictions are lifted, but it will take time for the country to return to the normalcy of the past few years.

Despite the current situation, the specialty-equipment industry remains optimistic and open for business. While COVID-19 has impacted operations, most companies continue to run more or less as normal or are only affected in the short-term. Consumers continue to work on their cars, and companies continue to sell their products.

At the end of the day, purchasing from our industry is voluntary. We sell “the stuff you want” not “the stuff you need.” In economic terms, our products fall under discretionary spending—which leaves our industry open to fluctuations and shortfalls when economic winds change direction. Our industry does well when consumers are confident and willing to spend money but tends to take a harder hit during a downturn. At the same time, this is also an enthusiast industry and hardcore enthusiasts will always find a way to keep pursuing their passion—even as other consumers scale back or delay making non-essential purchases. The current situation is no exception. Enthusiasts are using this time to work on their car or truck, perhaps even finishing a project they’ve been putting off. While it will take some time for things to return to normal, our industry is resilient and will persevere.

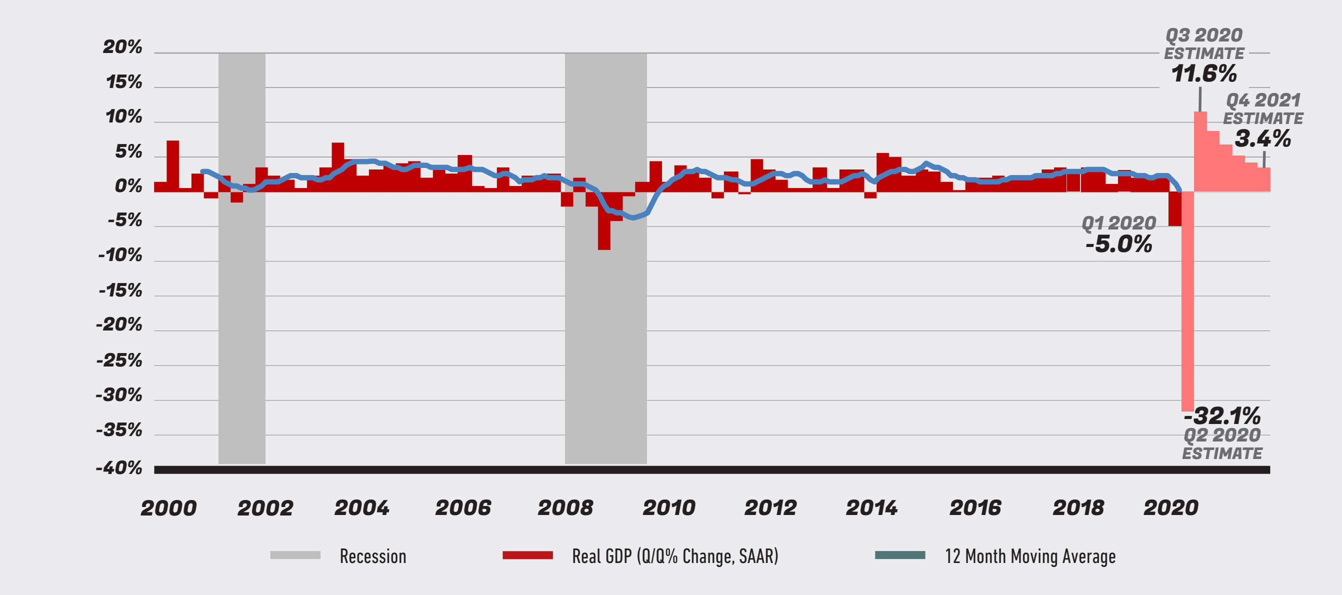
This year, in addition to our usual economic metrics, we’ve also included the results of a recent survey SEMA conducted with more than 1,800 industry professionals about how the outbreak is affecting their operations. We hope the information is helpful to you as you continue to navigate this situation and grow your business.

NATIONAL ECONOMIC AND CONSUMER TRENDS

Overall, 2019 was a good year for the U.S. economy and capped off the longest period of economic growth in U.S. history. While there is still a lot of uncertainty about the true economic impact of COVID-19, preliminary data from Q1 of 2020 suggest our economy has shrunk 5%. The economy is expected to fall steeply in Q2, but then grow robustly for the rest of the year as the country begins to recover.

U.S. ECONOMIC GROWTH % CHANGE

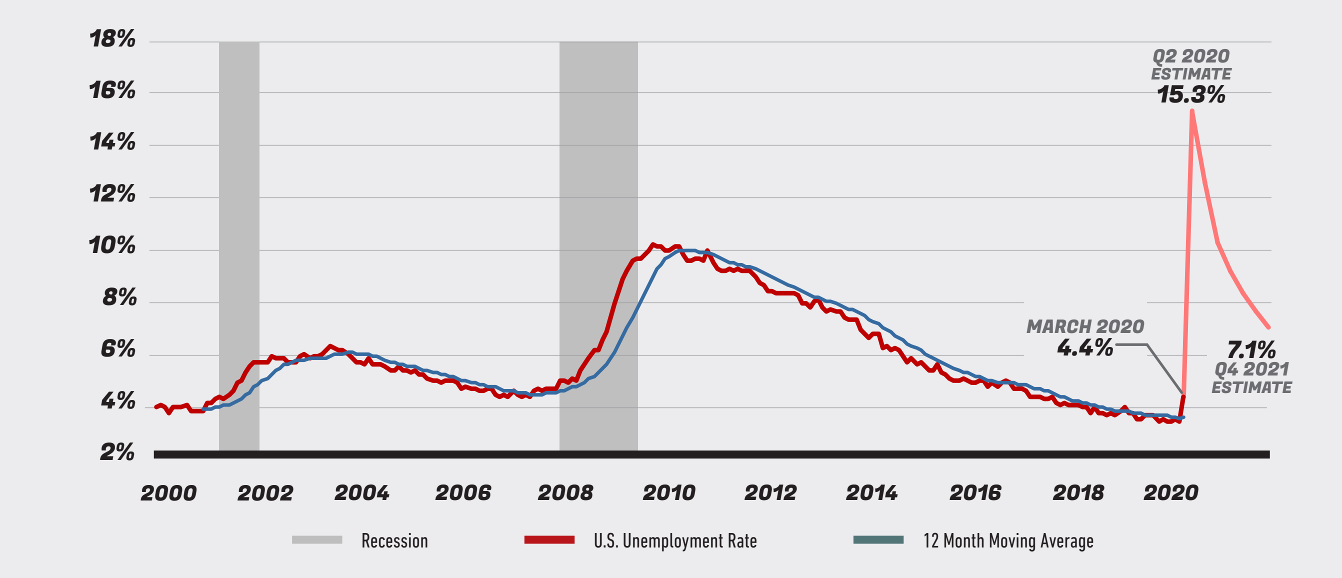
Source: Bureau of Economic Analysis, Avrio Institute



One aspect of the economy that has been hit particularly hard by the virus is employment. Government data from March estimates the official unemployment rate to be at 4.4%. Unemployment will reach its peak in Q2 of 2020 and then slowly start to recover. On a positive note, 80% of those who lost their job in April (nearly 18 million people) report that they are only temporarily unemployed. Getting people back to work will be key as the economy recovers.

U.S. UNEMPLOYMENT

Source: Bureau of Labor Statistics, Avrio Institute



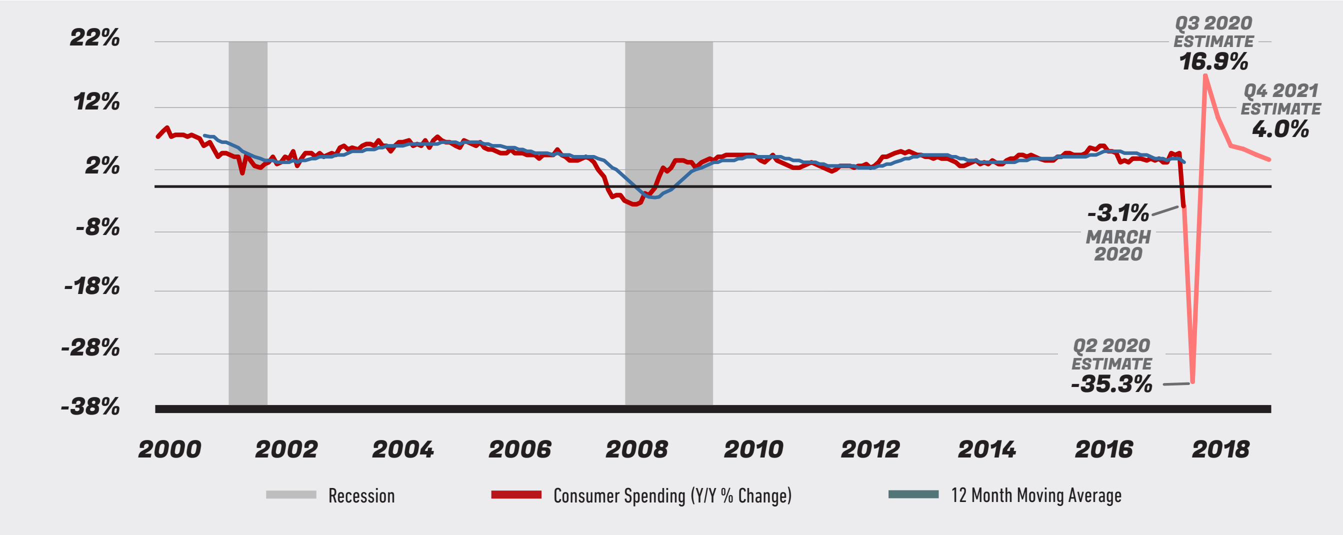
MARKET RESEARCH

WANT TO LEARN MORE ABOUT AND GET THE LATEST ECONOMIC AND CONSUMER TRENDS?
Download SEMA's latest monthly Industry Indicators Report at **www.sema.org/research**.

Consumer spending was strong last year. However, efforts to contain the virus have significantly curtailed purchasing of non-essential items. As a result, spending in March was down around 3% from last year. Spending will be hit hardest in Q2 2020 and then improve. As stores start to reopen and consumers feel safe to go shopping again, consumers will spend more money.

CONSUMER SPENDING % CHANGE

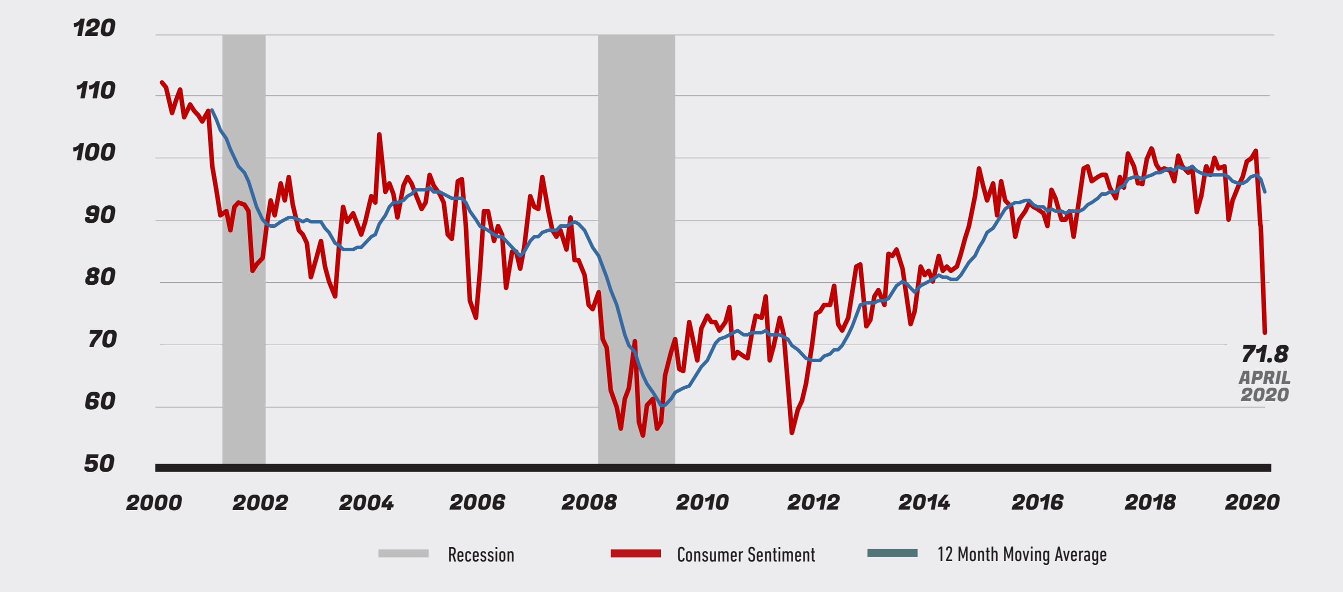
Source: Bureau of Economic Analysis, Avrio Institute



In 2019, consumer confidence reflected a strong and growing economy. COVID-19 has significantly changed this, at least in the short term. In April 2020, sentiment hit its lowest point in more than five years. This is likely to be the low point, and as the lockdown situation improves, consumers will regain their confidence.

CONSUMER SENTIMENT

Source: University of Michigan, Avrio Institute

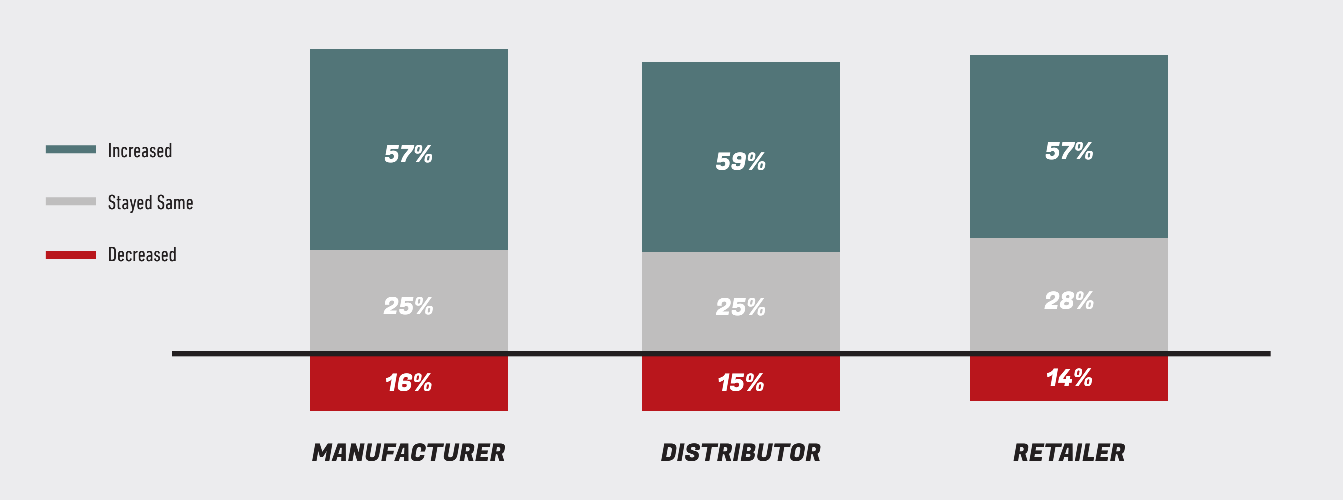


INDUSTRY PERSPECTIVES

As a whole, 2019 was a strong year for sales of specialty-aftermarket parts. Nearly 60% of manufacturers, distributors and retailers reported sales growth compared to 2018. These results have created a solid base for helping the industry overcome the current disruption.

CHANGE IN COMPANY SALES OVER LAST 12 MONTHS

Source: SEMA Industry Perspectives Spring 2020, Conducted Late 2019

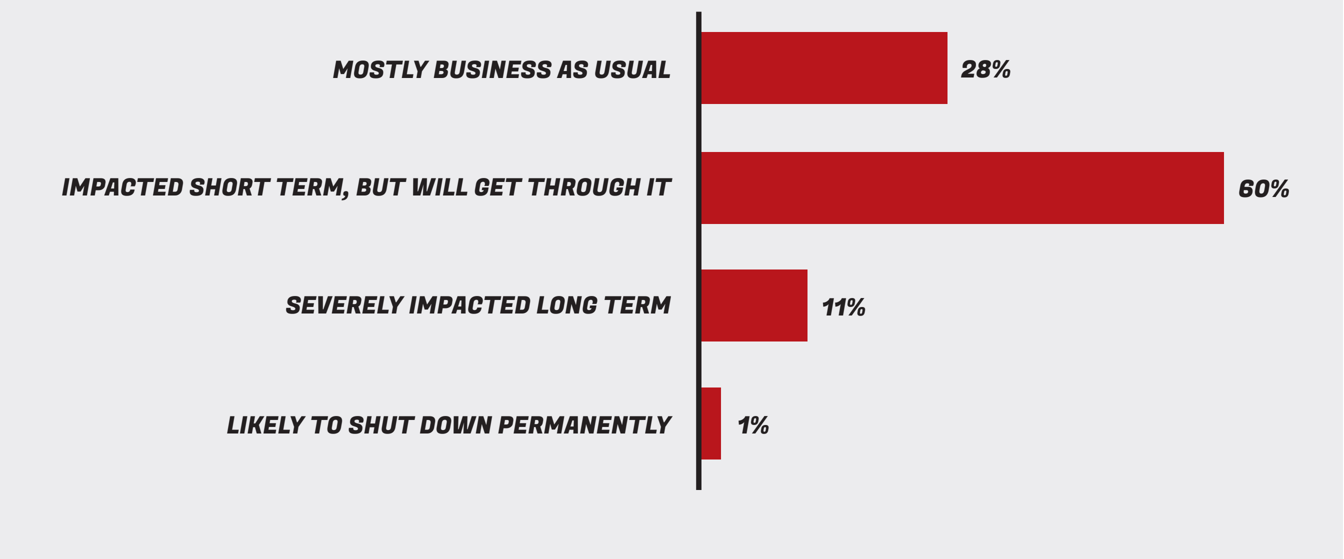


In May 2020, SEMA surveyed more than 1,800 professionals in the specialty-equipment industry. While the virus has impacted business, most of the industry maintains a positive outlook. Approximately 88% of companies surveyed report that it's "mostly business as usual" or that they are "impacted short term, but will get through it."

WHICH STATEMENT BEST DESCRIBES YOUR CURRENT BUSINESS OUTLOOK

Source: SEMA Coronavirus Industry Impact Survey

Conducted May 20–29 2020

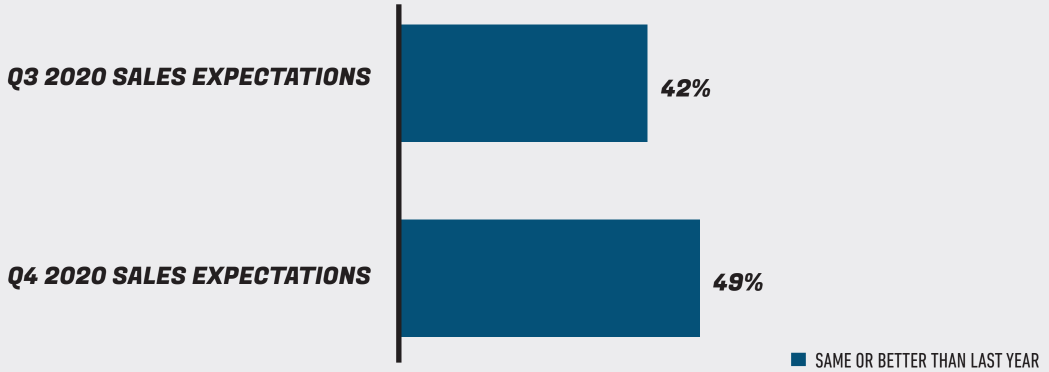


Similarly, companies within the specialty-equipment industry are optimistic about sales for the rest of the year. For Q3 2020, 42% of companies expect their sales to be the same as or better than 2019. By Q4 of 2020, that number jumps to almost half of the industry.

WHAT ARE YOUR SALES EXPECTATIONS FOR Q3 AND Q4 2020?

Source: SEMA Coronavirus Industry Impact Survey

Conducted May 20–29 2020

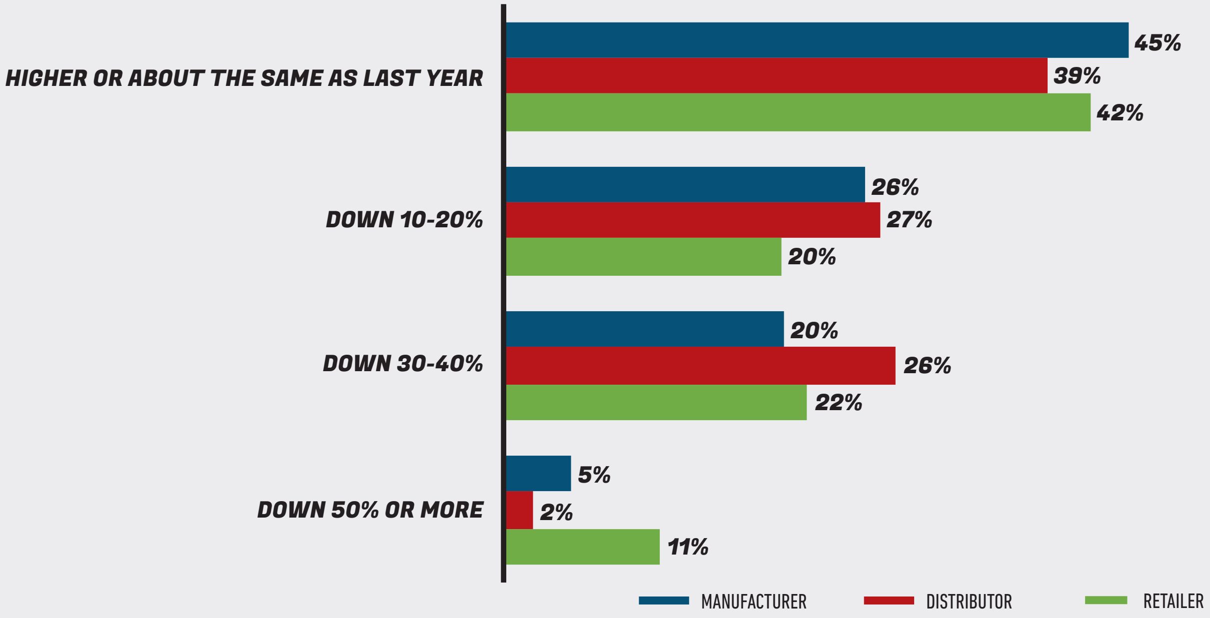


Manufacturers, retailers and distributors are especially optimistic about their sales prospects for 2020. If the situation improves in the next few months, 45% of manufacturers, 42% of retailers, and 39% of distributors expect their 2020 sales to be higher or the same as their 2019 sales.

IF THE SITUATION IMPROVES IN THE NEXT 1-2 MONTHS, HOW DO YOU EXPECT 2020 SALES TO END UP FOR YOUR BUSINESS? VS. 2019

Source: SEMA Coronavirus Industry Impact Survey

Conducted May 20–29 2020

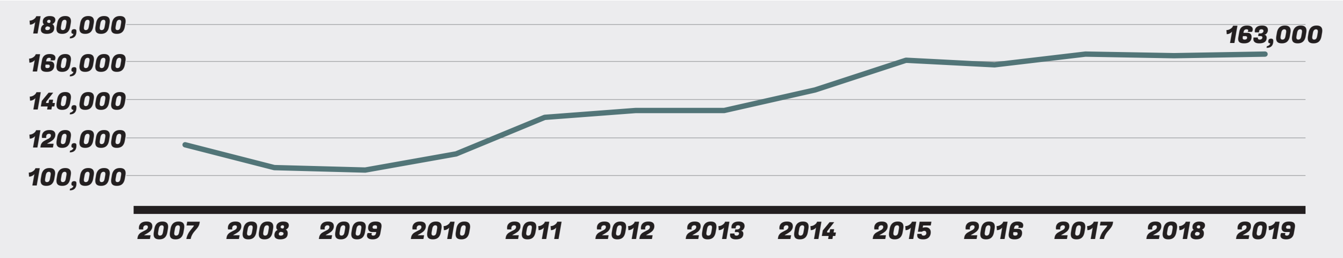


THE SEMA SHOW

Estimated attendance at the 2019 SEMA Show hit a record-high of 163,000 people and represents the highest-ever attendance for the event. The 2020 SEMA Show will be held November 3–6 in Las Vegas.

ESTIMATED SEMA SHOW ATTENDANCE

Source: SEMA



SEMA SHOW NEW PRODUCTS SHOWCASE

More than 800 different companies submitted a total of approximately 2,600 unique products for the 2019 SEMA Show's New Products Showcase. The following table lists the percent of product categories within the New Products Showcase compared to the past few SEMA Shows.

TOTAL PERCENTAGE OF NEW PRODUCTS BY SHOWCASE CATEGORY

Source: SEMA

	2017	2018	2019
Performance-Street Product	15.0%	15.5%	13.6%
Off-Road/4-Wheel Drive Pzroduct	12.0%	14.6%	11.2%
Exterior Accessory Product	9.0%	10.2%	10.8%
Performance-Racing Product	10.0%	11.0%	10.3%
Tools & Equipment Product	5.5%	6.8%	9.2%
Featured Product	6.7%	7.1%	7.9%
Collision Repair & Refinish Product	4.6%	4.8%	5.9%
Van/Pickup/Sport-Utility Product	6.0%	5.1%	5.5%
Interior Accessory Product	3.0%	3.2%	4.3%
Engineered New Product	5.0%	4.4%	4.2%
Street Rod/Custom Car Product	5.0%	4.6%	4.2%
Wheel and Related Product	6.0%	3.1%	3.4%
Mobile Electronics Product	4.0%	2.7%	3.1%
Powersports Product	3.0%	3.1%	3.0%
Tire and Related Product	2.0%	2.1%	1.8%
Packaging Display/Design	0.8%	1.5%	1.0%
Merchandising Display	1.0%	0.4%	0.5%

OVERVIEW

In order to make informed decisions about which products to produce or carry, companies need to understand the size of their potential market. Whereas the Market Sizing section of this report covers the current size of the opportunity for different products and vehicles, this section looks at the potential market, i.e., how many vehicles are actually on the road.

The total light-duty vehicle fleet stood at more than 280 million cars and light trucks at the end of 2019. Most of these are from model years 2000 and onward, and, in general, the population of a given model year starts to drop once it has been on the road for more than a decade.

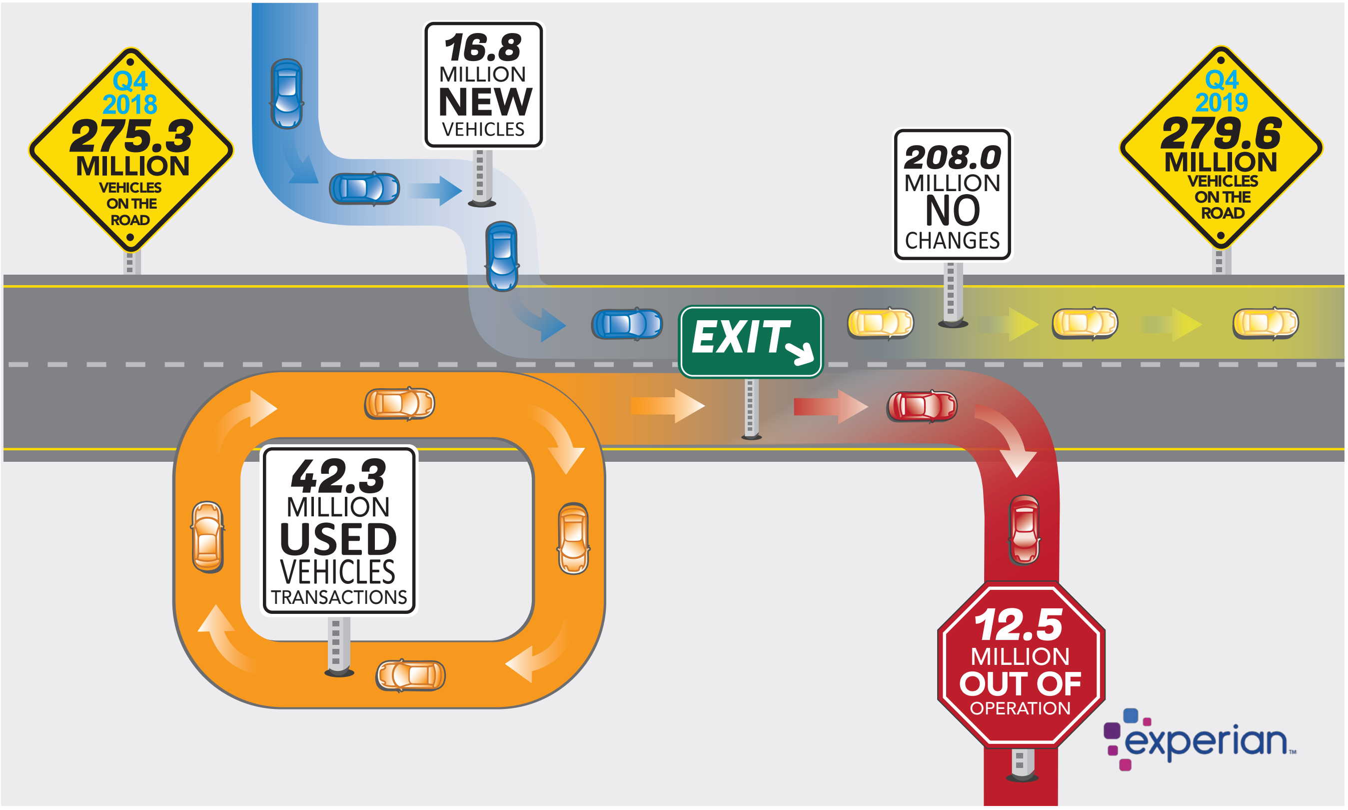
Note that the data presented in this section is aggregated. Eligible SEMA-member companies can access more detailed information (e.g., by make/model, engine size, or location) at no cost through our SEMA Member VIO Program made possible by our partnership with Experian. For more information, visit www.sema.org/vio. Additionally, through its partnership with Ward's Automotive, SEMA has access to up-to-date vehicle model sales information which can also be provided to SEMA members.

VEHICLE REGISTRATIONS

The U.S. passenger vehicle fleet increased by a net of more than 4 million cars and light trucks from 2018 to 2019. While this may appear to be a small shift, 16.8 million new registrations and a turnover of 42.3 million used vehicles indicates that roughly 59 million passenger vehicles changed hands in 2018. Most new vehicles were from the 2019 and 2020 model years. Conversely, the vehicles taken out of operation were almost all from 2009 and earlier (i.e., more than 10 years old).

CHANGE IN LIGHT-VEHICLE POPULATION VS. 2018 IN MILLIONS

Source: ©Experian 2020



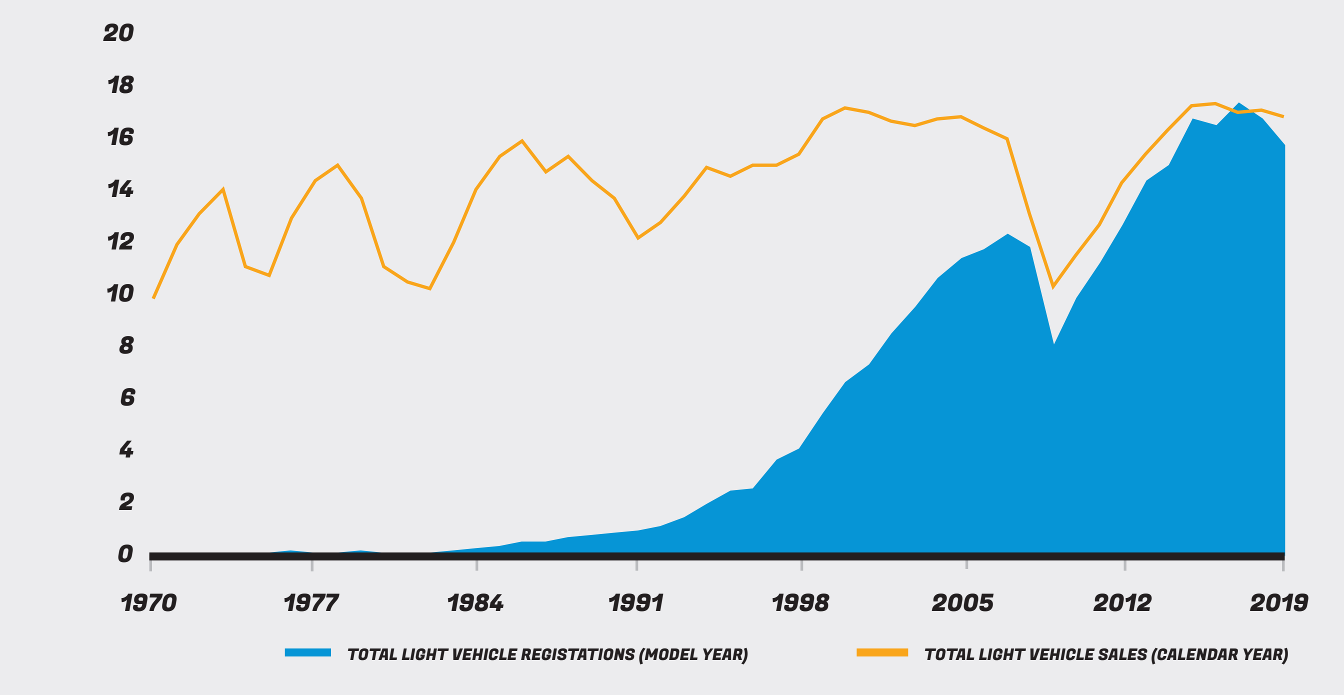
WANT TO LEARN MORE? CHECK OUT THE SEMA MEMBER VIO PROGRAM
Eligible SEMA member companies can access more detailed registration data at **www.sema.org/vio**.

HISTORICAL VEHICLE SALES

Vehicle sales tend to follow the overall economy—rising and falling with the business cycle. The previous recession beginning in 2008 had a strong negative impact on sales, followed by an extended recovery period before ending up at a new historical high. While it remains to be seen how the second half of 2020 plays out, we can likewise expect some negative impact on new vehicle sales and registrations due to the temporary closure of vehicle dealerships and broader economic slowdown, followed by a recovery.

Vehicle registrations show how many cars and light trucks are actually on the road. Most of the vehicles sold during and after the recession are still out there being driven, but 2006 and older vehicles are becoming increasingly rare. Classic and collector vehicles more than 20 years old represent a unique opportunity in the market, but the bulk of vehicles available to be modified are later-model.

LIGHT VEHICLE SALES vs LIGHT VEHICLE REGISTRATIONS IN MILLIONS **Source: ©Experian 2020 ©Informa PLC 2020**



WANT TO LEARN MORE? CHECK OUT THE SEMA MEMBER VIO PROGRAM
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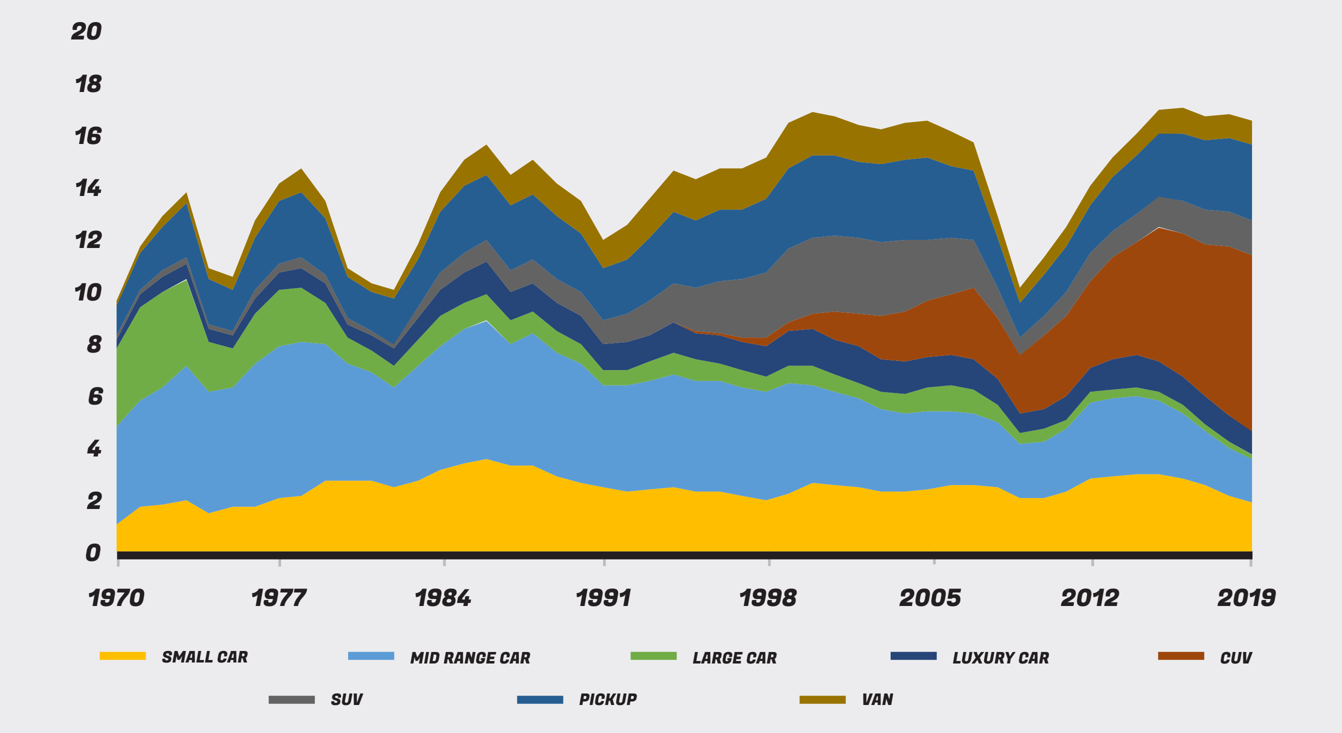
COMPOSITION OF U.S. LIGHT VEHICLE POPULATION

As the vehicle mix and consumer preferences have changed, sales have shifted towards light trucks (CUVs, SUVs, vans and pickups) over the last 30 years. A large part of this has been the growth in CUVs, which were nonexistent prior to 1990 but have become an immensely popular family vehicle since. While the 1990s through the mid-2000s also saw a strong rise in the popularity of SUVs, the recession reversed this trend somewhat, driving consumers toward smaller, cheaper, more efficient vehicles. But in the last five years, demand has swung increasingly towards light trucks (pickups and CUVs, in particular).

ANNUAL NEW VEHICLE SALES BY SEGMENT IN MILLIONS

Source: ©Informa PLC 2020



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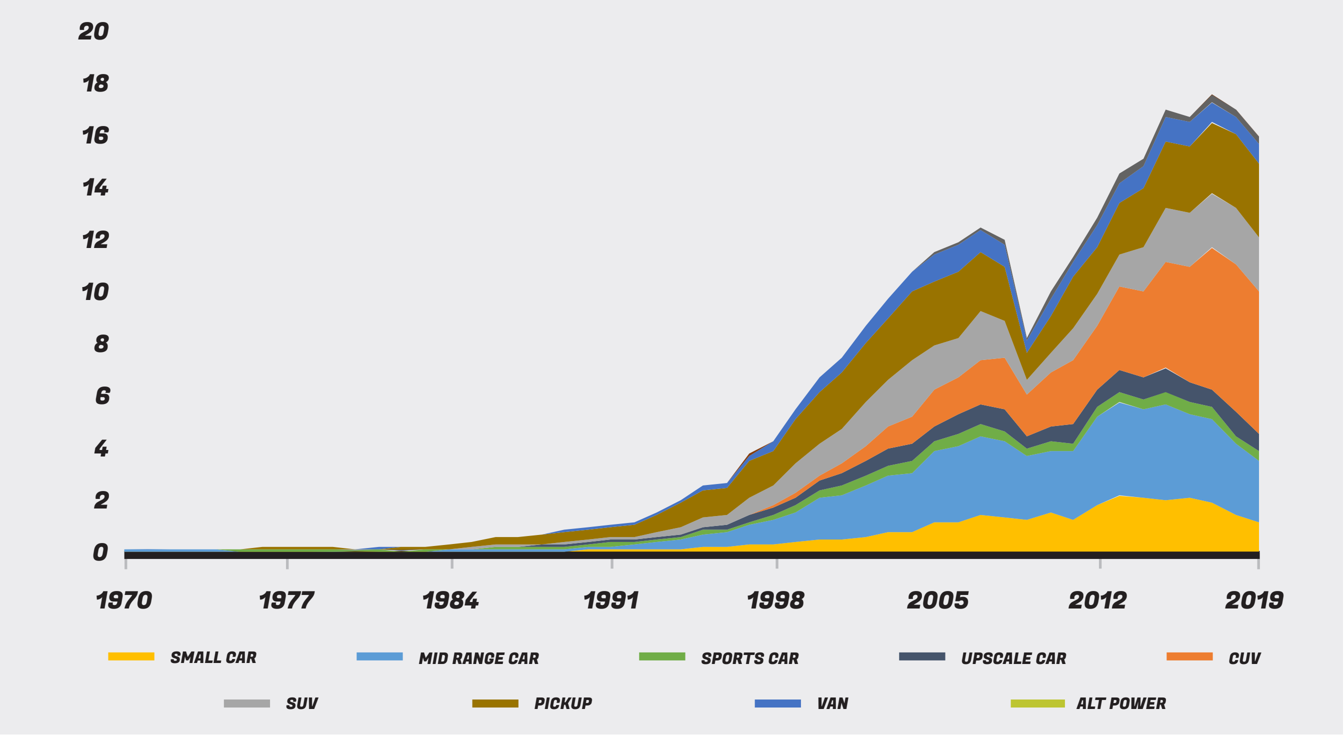
When we look at the composition of vehicles in operation, the impact of the growth in CUV sales becomes even more apparent. However, pickups tend to stay on the road longer than other segments and form a disproportionately large share of vehicles which have been in operation for 20 or more years since manufacture.

PASSENGER VEHICLE SEGMENTS BY MODEL YEAR IN MILLIONS

Source: ©Experian 2020

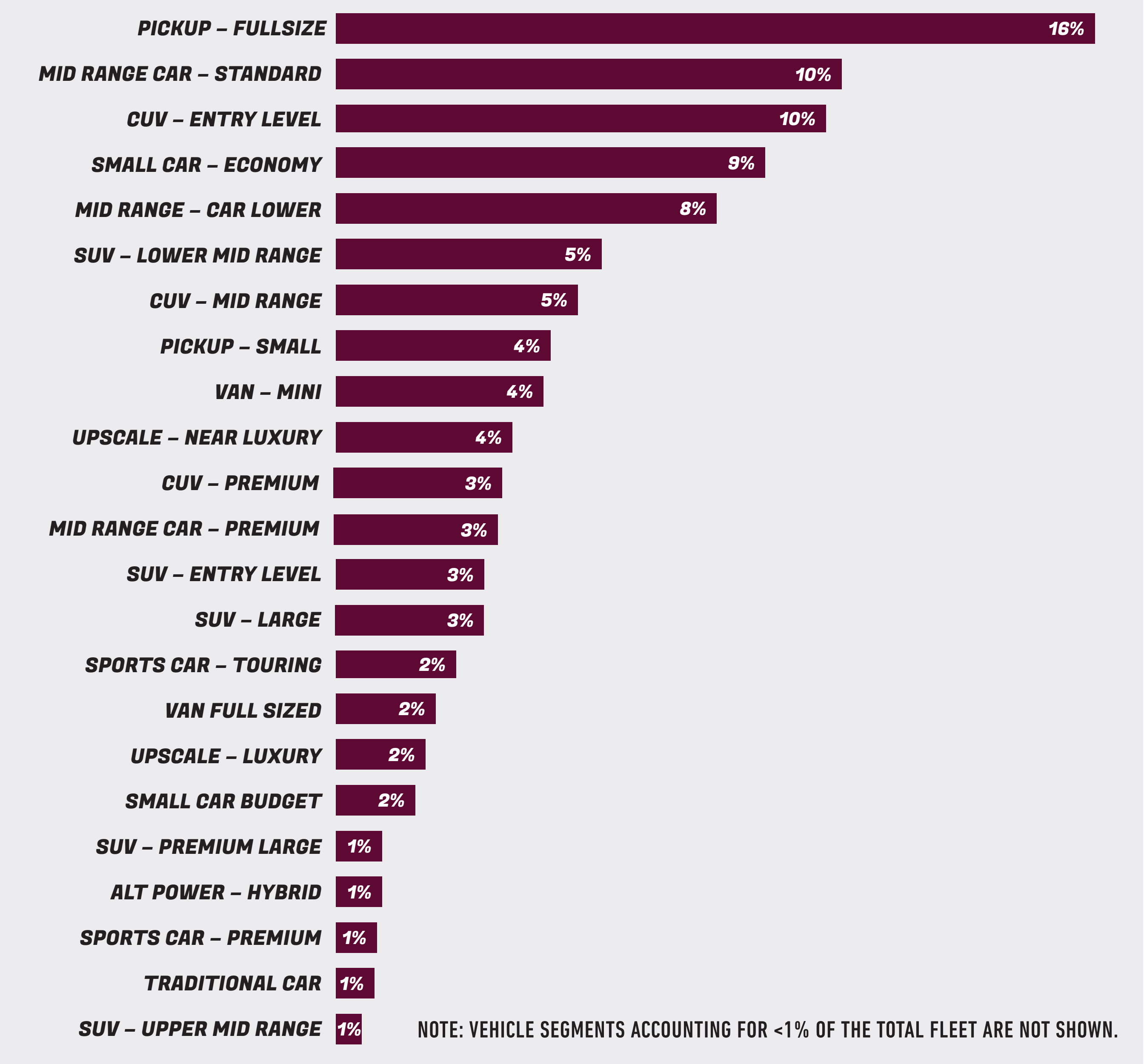


VEHICLE SEGMENTS

Fullsize pickups are the most common subtype on the road today, despite the ongoing changes in vehicle segment sales and preferences. One of the main factors behind this is the continued popularity of domestic half-ton pickups (Ford F-150, Chevrolet Silverado 1500, and RAM 1500) throughout the United States, but particularly in the South.

Note that alternative-power vehicles (hybrid, electric, etc.) currently comprise less than 1% of the total U.S. vehicle fleet. In fact, hybrid cars are the only alternative power vehicle subtype to capture a notable share of total registrations. Even if hybrid and electric vehicle sales continue to grow at a faster rate than other segments, we estimate that by 2026 only about 18% of new vehicles sold (and a smaller share of the overall light vehicle fleet) will be alternative power.

VEHICLE SEGMENT SUBTYPES % REGISTRATIONS AS OF 12/31/2019 **Source: ©Experian 2020**



NOTE: VEHICLE SEGMENTS ACCOUNTING FOR <1% OF THE TOTAL FLEET ARE NOT SHOWN.

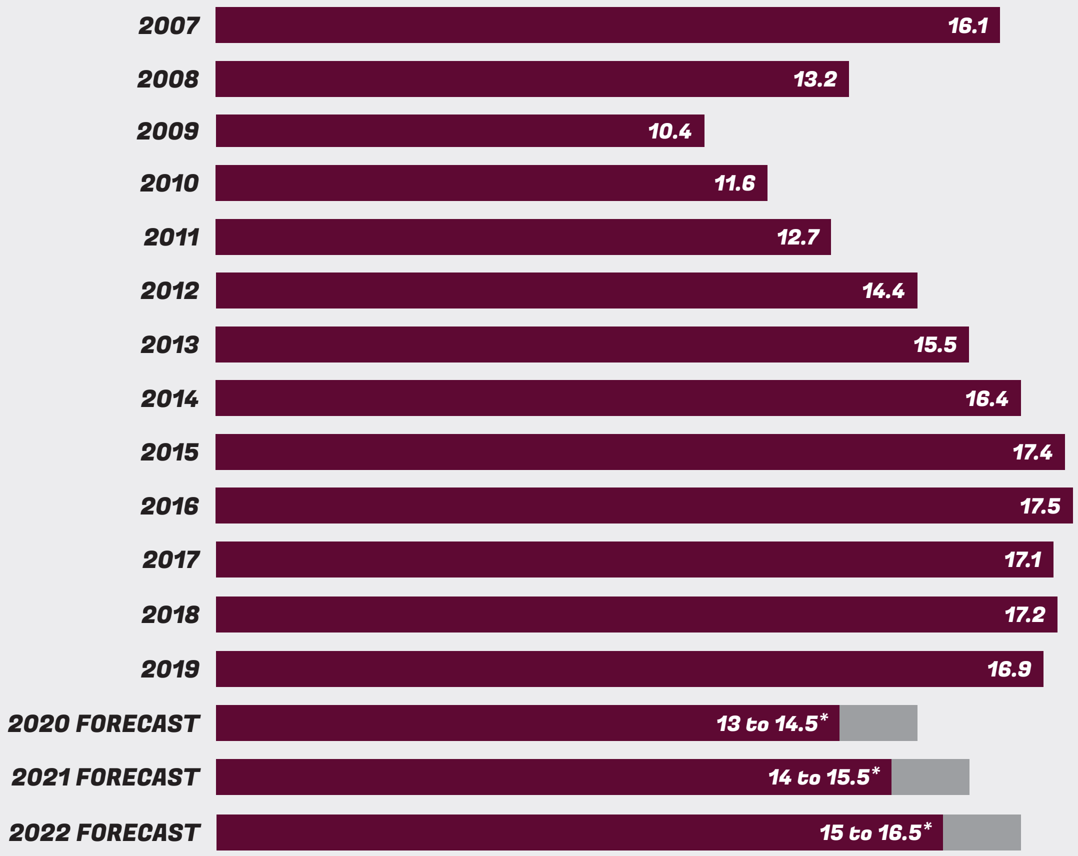
NEW VEHICLE SALES FORECAST

Heading into 2020, there was already an expectation that new-vehicle sales would see a slight slump. With the COVID-19 lockdown forcing some markets to zero sales in April 2020, the sales forecast has dropped even further.

While the worst of the shock bottomed quickly, March, April and May saw consumer new car sales levels of 30%–40% below expectation. The drop is further fueled by likely reductions in the fleet market as sectors like car rental are pulling back. Shutdowns at assembly plants and among parts suppliers may also reduce the availability of vehicles on lots in the coming months. But May and early June have seen consistent sales improvement to nearly pre-virus estimates, showing a willingness of consumers to return to shopping.

As we move forward, a big question is how quickly new-vehicle sales will return to prior years' sales levels. At the time of the report's publication, industry analysts were forecasting 2020 sales as likely to end up around 13–14 million vehicles, with growth from there over the next few years.

NEW LIGHT VEHICLE SALES AND FORECAST SALES (MILLIONS UNITS) **Source: ©Informa PLC 2020**



*Forecast based on compsite of industry estimates

RESEARCH METHODOLOGY

The "2020 SEMA Market Report" was compiled utilizing a variety of data sources, including interviews with industry sources, consumer surveys, secondary data sources and published government statistics. The main data was provided by the following resources:

SEMA MARKET DATA: CONSUMER MARKET DATA, CONSUMER PROFILE

The study surveyed 29,000 adults across the United States who own or lease an automobile. Among those interviewed, approximately 8,000 people were identified as having modified or accessorized their vehicle in 2019. This study represents the buying habits of a large cross-section of specialty-equipment purchasers.

EXPERIAN: VEHICLE REGISTRATIONS, VEHICLE SEGMENTS

Through the SEMA Member VIO program—Powered by Experian Automotive, members are able to get specific insight into the number of vehicles on the road.

Experian's vehicle segmentation definitions are used throughout the market sizing and profiling sections to consistently differentiate vehicle types. To learn more about Experian and their automotive product offerings, visit **www.experian.com/automotive**. Eligible SEMA-member companies can access VIO data at **www.sema.org/vio**.

WARD'S AUTO/INFORMA PLC: VEHICLE SALES

SEMA has partnered with Ward's Auto Intelligence, a division of Informa PLC, to obtain access to vehicle sales data in order to help SEMA member companies understand current trends and developments.

Ward's Auto is part of the Transportation Intelligence Group of Informa PLC, providing news and insights on the global automotive industry.

BUREAU OF ECONOMIC ANALYSIS: U.S. ECONOMIC GROWTH, CONSUMER SPENDING
BUREAU OF LABOR STATISTICS: U.S. UNEMPLOYMENT

Data was collected from published government statistics.

UNIVERSITY OF MICHIGAN (UMI): CONSUMER SENTIMENT INDEX

Data was collected from the published results of UMI's "Survey of Consumers."

AVRIO INSTITUTE: ECONOMIC AND CONSUMER INDICATORS, FUTURE TRENDS

Economic and industry analysis provided by Avrio Institute, in collaboration with SEMA Market Research.

SEMA INDUSTRY INDICATORS

This monthly report provides a high-level snapshot of the overall U.S. economy with an emphasis on economic data that directly or indirectly affects the automotive aftermarket industry.

SEMA FUTURE TRENDS REPORT

This report takes a deeper dive into both the overall economy and the specialty-equipment market, and forecasts how the industry will change and evolve over the next few years.

SEMA CORONAVIRUS INDUSTRY IMPACT SURVEY

From May 20-29, SEMA conducted a survey of more than 1,800 professionals within the specialty-equipment industry. Overall, our industry continues to maintain a positive outlook and is beginning to move past the disruption.

RESEARCH METHODOLOGY CONTINUED

SEMA INDUSTRY PERSPECTIVES REPORT

Each year, SEMA surveys industry professionals to learn more about the state of the industry, perceived market barriers, and current/projected product trends. This report looks at how the specialty-equipment industry is doing from the perspective of those working in it.

MARKET DEFINITIONS

DEFINING THE SPECIALTY-EQUIPMENT MARKET

The specialty-equipment market includes parts and accessories that are manufactured, sold and distributed for cars, light trucks and other passenger vehicles (motorcycles, ATVs, UTVs, boats, etc.). This report, including the market sizing, focuses specifically on cars and light trucks. Specialty-equipment products are designed to customize or enhance the performance, handling or appearance of new or used vehicles. The market does not, however, include direct-repair or replacement parts intended to replicate factory specs (except in the case of restoration parts for classic vehicles). The specialty-equipment market is often described as “the parts you want” rather than “the parts you need.” Some examples of products that fall into the specialty-equipment market include exhaust kits, suspension kits, body kits or spoilers, custom wheels, stereo systems and engine modifications to increase horsepower.

DEFINING SPECIALTY-EQUIPMENT CONSUMERS

Throughout this report, we use the terms “accessorizer” and “consumer” interchangeably. When we talk about specialty-equipment consumers or about accessorizers, we mean individuals who, in 2018, bought parts for their passenger vehicle to alter the appearance, performance, handling or function of the vehicle. This includes someone who bought accessories, such as custom floor mats, all the way up to a hardcore enthusiast who performed a full engine swap.

Accordingly, specialty-equipment consumers are very diverse in their objectives, attitudes and behaviors. SEMA Market Research partnered with an independent research firm to identify six broad types of people who buy specialty-equipment parts and accessories:

Builders:	The core hobbyists. They focus on the enjoyment and satisfaction gained from working on their vehicles.
Drivers:	Auto enthusiasts. They accessorize and modify with an eye toward the enjoyment they get from using their vehicles.
In-Crowd:	Social enthusiasts. They enjoy the interactive aspects and recognition they get from having a unique or high-profile vehicle. They are often car club members and attend car shows.
Handyman:	Do-it-yourself mechanics. They work on their vehicles to save money and prolong vehicle life and may be open to upgrades as part of their repair projects.
Commuter:	The everyday drivers. They view their vehicles more as functional tools for getting around than reflections of their interests or lifestyles.
DIFM:	“Do-it-for-me,” the least savvy owners. They rely on their mechanic for all vehicle maintenance and upgrade needs.

Builders, Drivers and In-Crowd buyers are considered to be auto enthusiasts. They are typically more engaged in the automotive aftermarket scene and tend to spend more on parts. Non-enthusiasts include the Handyman, Commuter and DIFM segments. While they spend less and are less likely to make complex modifications, they comprise the majority of the specialty-equipment customer base.

For more information on these segments and their habits, download the SEMA Consumer Segmentation Report at **www.sema.org/research**.

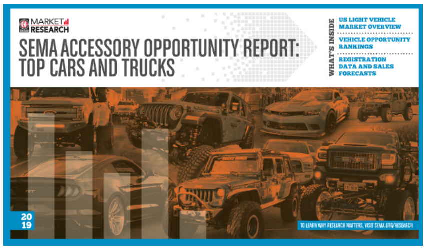
SEMA MARKET RESEARCH

While the SEMA Market Reports provide a detailed overview of the specialty-equipment market, they are far from the only research SEMA conducts on the industry's behalf. The SEMA Market Research team regularly commissions research from independent providers to address topics of interest, ranging from bite-size monthly updates on relevant trends to full-length custom research reports.

The following are some examples of other information readers can find on our website, **www.sema.org/research**.

CONSUMER INSIGHTS RESEARCH

SEMA ACCESSORY OPPORTUNITY REPORT



MARKET RESEARCH

SEMA ACCESSORY OPPORTUNITY REPORT:
TOP CARS AND TRUCKS

WHAT'S INSIDE
- US LIGHT VEHICLE MARKET OVERVIEW
- VEHICLE OPPORTUNITY RANKINGS
- REGISTRATION DATA AND SALES FORECASTS

20
19

TO LEARN WHY RESEARCH MATTERS, VISIT SEMA.ORG/RESEARCH

The "SEMA Accessory Opportunity Report" provides data-driven insights into the opportunities available to the automotive aftermarket. Designed to help businesses understand which cars and trucks consumers are choosing to personalize, this report provides an overview of the top vehicles for accessorization and outlines emerging segments within the industry.

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MODERN MUSCLE CAR ACCESSORIZER REPORT

MARKET RESEARCH

MODERN MUSCLE CAR
ACCESSORIZER REPORT

WHAT'S INSIDE
- MARKET LANDSCAPE
- HOW THEY MODIFY
- WHY THEY MODIFY

20
18

The "Modern Muscle Car Accessorizer Report" provides an overview of the specialty-equipment market for muscle cars: Chevrolet Camaro, Dodge Challenger, and Ford Mustang. The report includes data collected on how consumers modify their late model muscle cars: what parts they buy, how they shop, and how specialty-equipment business can connect with them to help sell their products.

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SEMA YOUNG ACCESSORIZERS REPORT

MARKET RESEARCH

SEMA YOUNG ACCESSORIZERS REPORT

WHAT'S INSIDE
- HOW THEY SHOP
- WHY THEY MODIFY
- REACHING ACCESSORIZERS

20
18

TO LEARN WHY RESEARCH MATTERS, VISIT SEMA.ORG/RESEARCH

Despite common perceptions to the contrary, Young people are an important part of our industry. The "SEMA Young Accessorizers Report" provides an overview of young accessorizers age 16-24. This report includes data collected on who they are, what and where they modify, how they shop, how cars fit into their social life, and how to reach them.

INDUSTRY-FOCUSED RESEARCH

SEMA RETAIL LANDSCAPE REPORT

MARKET RESEARCH

SEMA RETAIL LANDSCAPE REPORT:
THE BUSINESS OF SELLING TO CONSUMERS

WHAT'S INSIDE
- MARKET LANDSCAPE
- BUSINESS TRENDS
- CHALLENGES AND OPPORTUNITIES

2019

TO LEARN WHY RESEARCH MATTERS, VISIT SEMA.ORG/RESEARCH

The "SEMA Retail Landscape Report" offers specialty-automotive businesses insight into the evolving dynamics playing out in parts retail. Designed to help retailers and businesses who work with them understand some of the major strategic challenges and opportunities retailers in our industry face, this report provides an overview of the business landscape as it currently stands and what may be shaping its future.

INDUSTRY INDICATORS REPORTS

SEMA
INDUSTRY
INDICATORS

Starting in November 2017, SEMA Market Research began releasing monthly "SEMA Industry Indicators" reports. These quick, easy-to-read snapshots are meant to give specialty-equipment businesses a view of key auto industry and broader economic trends through the lens of how they could impact their business. New reports are released on the second or third Thursday of every month.

SEMA FUTURE TRENDS REPORT

MARKET RESEARCH

SEMA
FUTURE TRENDS

WHAT'S INSIDE
- ECONOMIC OUTLOOK
- POWERTRAIN FORECAST
- NEW VEHICLE SALES FORECAST

2018 SUMMER

REPORT AVAILABLE FOR DOWNLOAD AT SEMA.ORG/RESEARCH

The "SEMA Future Trends Report" offers a look at what lies ahead through forward-looking analyses of economic and automotive factors that impact the specialty-equipment industry. In addition to an expanded look at the kinds of data covered in our monthly "SEMA Industry Indicators" reports, this report also includes forecasting and spotlights on key trends facing the industry.

SEMA CONSULTING

SEMA can work directly with member companies to find and use information relevant to their business to help make strategic decisions. SEMA's Market Research team has access to a number of information sources, including strategic partnerships with Experian Automotive and Ward's Automotive that grant eligible member companies access to hard data on the vehicle population.

Some examples of the types of business questions SEMA can help answer include:

- I'm a manufacturer debating whether to invest in tooling for an aftermarket turbo for Ford EcoBoost engines, but need to figure out if there's enough potential demand to justify the cost. What's the size of the potential market for this product by application?
- I'm a speed shop looking to open a new location, and we've narrowed things down to a shortlist of six potential counties. Based on the vehicle applications we serve, which counties offer the best opportunity?
- I'm a distributor focused on pickups, and we're about to start gearing up for a marketing campaign. Where should we focus our efforts to reach the most potential customers?

Whatever your business objective may be, SEMA can help connect you with the information necessary to make an informed decision on how to proceed.

FOR QUESTIONS CONTACT:

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2020 SEMA MARKET REPORT