



S E M A

# VEHICLE LANDSCAPE REPORT

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MARKET  
RESEARCH

# WELCOME TO THE SEMA VEHICLE LANDSCAPE REPORT

There are over 281 million passenger vehicles on the road in the United States today and the overall vehicle population is changing. Light trucks, especially CUVs, are becoming more popular. More alternative energy models are coming out each year.

What does the current vehicle landscape look like? What are the latest trends? Where is the opportunity for the specialty-equipment industry moving forward?

This report will help answer these questions and much more. With this report, your business can get a better understanding of the current vehicle climate and where it's going so that you can have more success in 2021 and beyond.

This report is meant to help you understand the overall vehicle market. SEMA Members can also get access to more comprehensive vehicle sales and VIO information through the SEMA Market Research department partnership programs. For more information, please visit our website at [www.sema.org/research](http://www.sema.org/research).

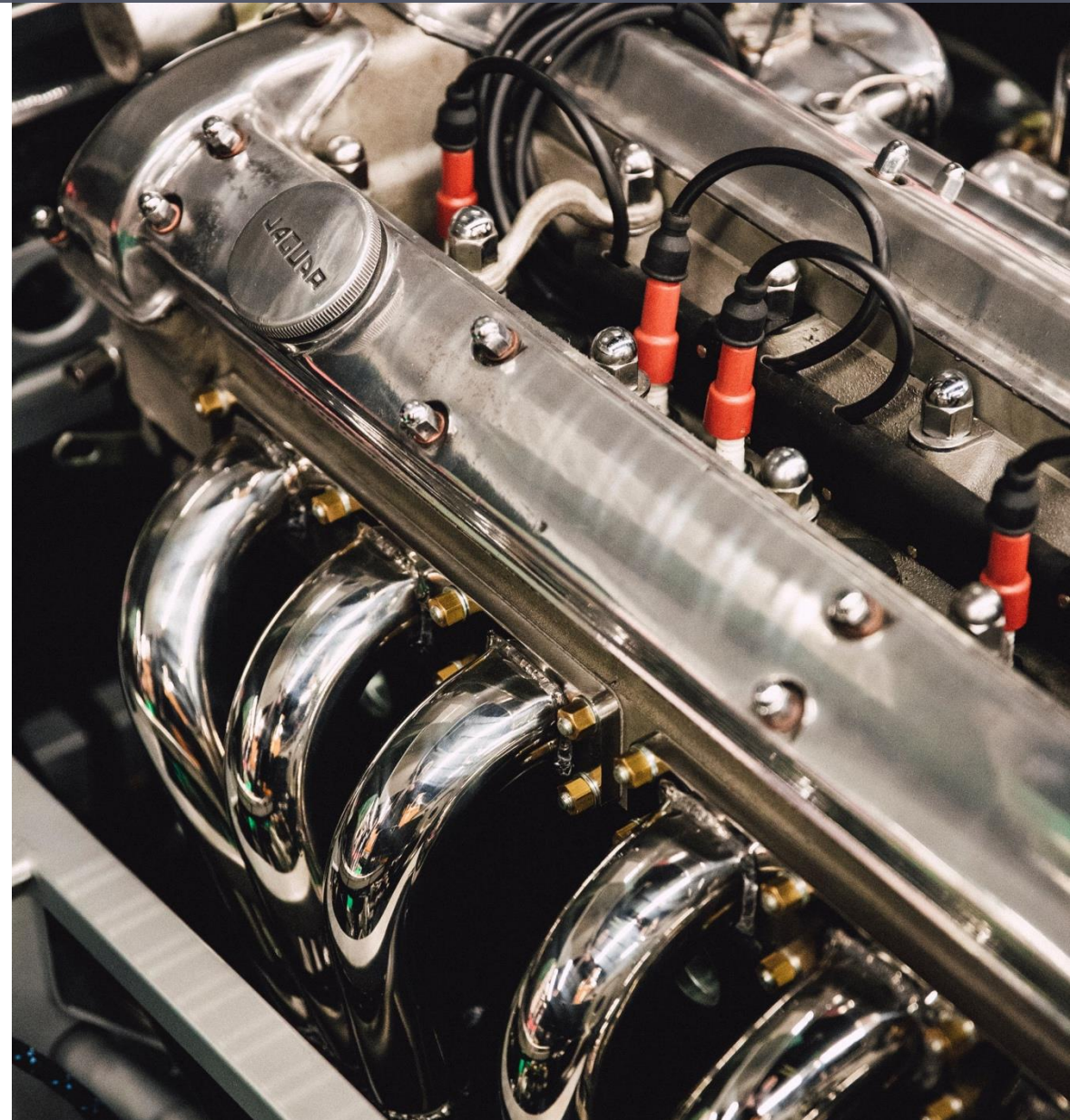


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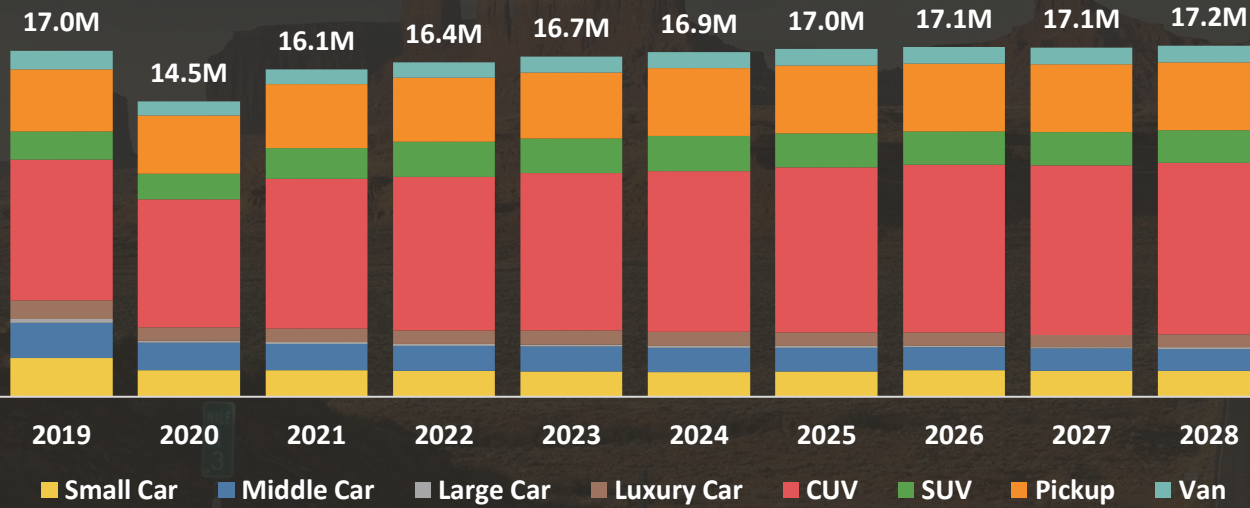
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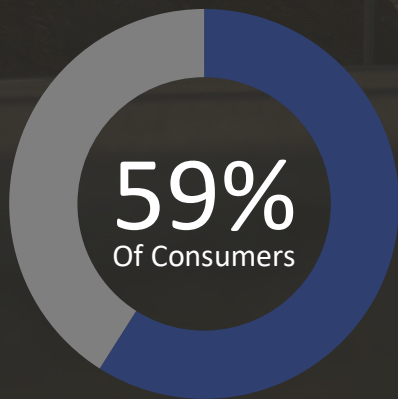
# NEW SALES ARE REBOUNDED

### New Light Vehicle Sales Forecast by Segment



New vehicle sales were hit hard at the beginning of the pandemic but are bouncing back.

- The auto industry should recover quickly as the virus situation improves. SEMA Market Research anticipates that sales will return to pre-pandemic levels within the next 2-3 years.
- During a typical recession, larger vehicles are hit hardest as consumers cut back spending and look for cheaper vehicles. In 2020, however, larger vehicles—specifically CUVs and pickups—are what kept light vehicle sales on track.
- As CUVs grow more popular, we anticipate them to dominate sales. BY 2028, SEMA Market Research anticipates that they will make up about half of all new light vehicles sold.



59%  
Of Consumers

Think it's a good time to buy a car.

January 2021  
University of Michigan

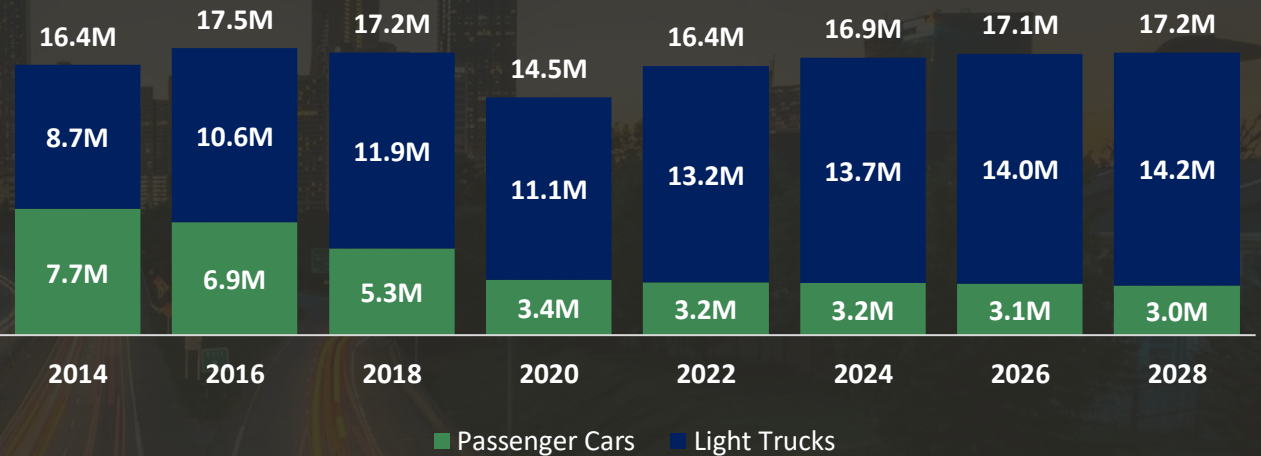


# CUV AND PICKUP SEGMENTS ARE DRIVING SALES

The U.S. vehicle landscape is shifting away from passenger cars to light trucks.

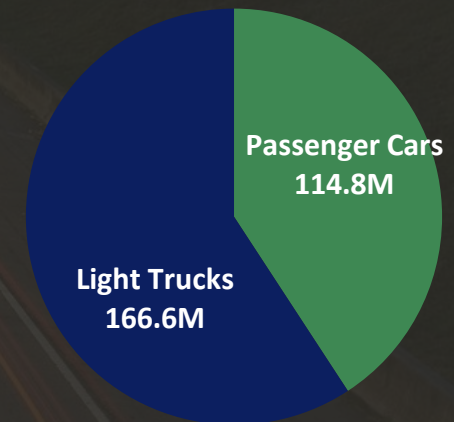
- By 2028, light trucks are expected to make up 82% of all new light vehicles sold, driven mainly by the popularity and growth of CUVs.
- That said, traditional cars aren't going away anytime soon. Currently there are 114.8 million cars on the road. Even as sales shift toward light trucks, traditional cars remain one of the largest segments on the road.
- The question for our industry is whether consumers will accessorize their new CUVs like trucks.

## New Light Vehicle Sales Forecast by Vehicle Type



## Breakdown of Current Vehicles in Operation

Total Registered as of Q4 2020



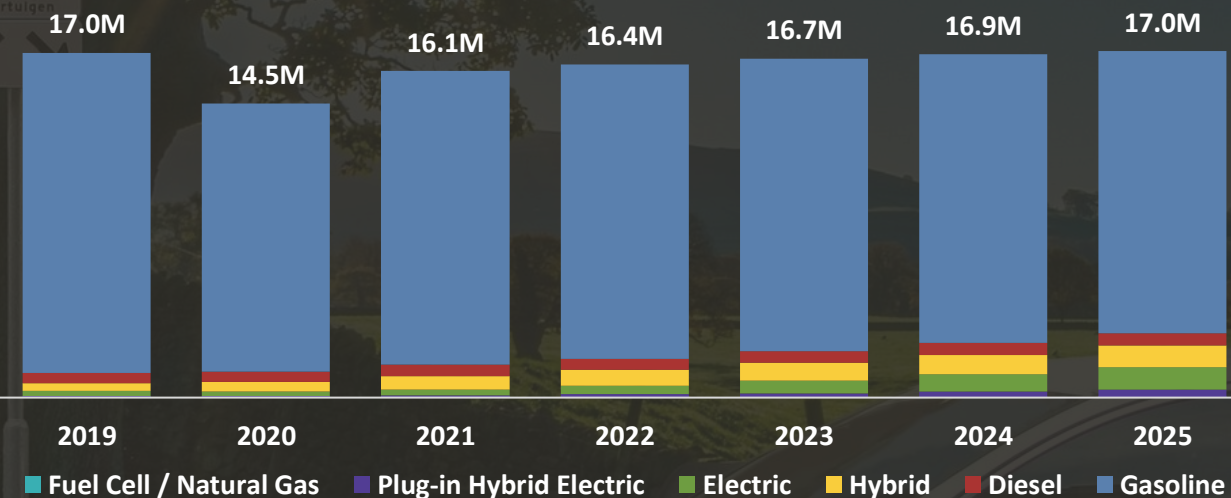


# ALTERNATIVE FUEL MARKET IS SMALL BUT GROWING

While electrification is growing in popularity, it will take a while for electric vehicles to become more mainstream.

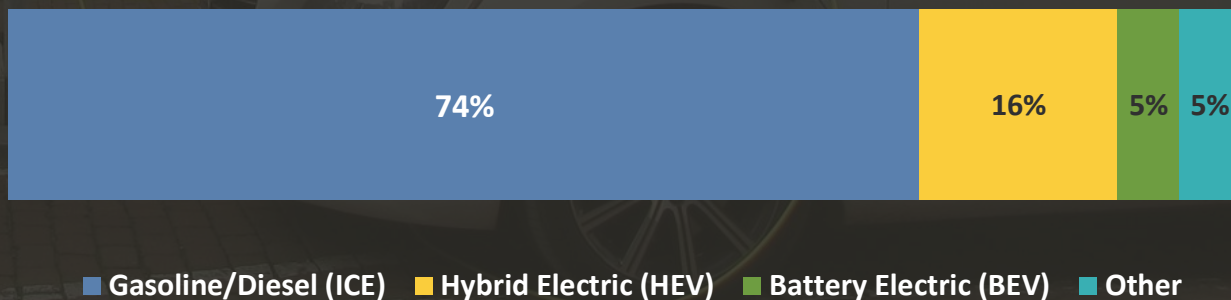
- Electric vehicles are becoming more popular. By 2025, SEMA Market Research anticipates they will account for 7% of light vehicle sales.
- Automakers are adding more alternative powertrains to their lineups. IHS anticipates that there will be 130 electric models sold across 43 brands in the U.S. by 2026.
- However, most consumers still prefer a traditional powertrain for their vehicle. Until more charging infrastructure and better battery technology develops, adoption of electric vehicles will remain limited.

### New Light Vehicle Powertrain Outlook



### Which Powertrains Do U.S. Consumers Want For Their Next Car?

Data as of 2021





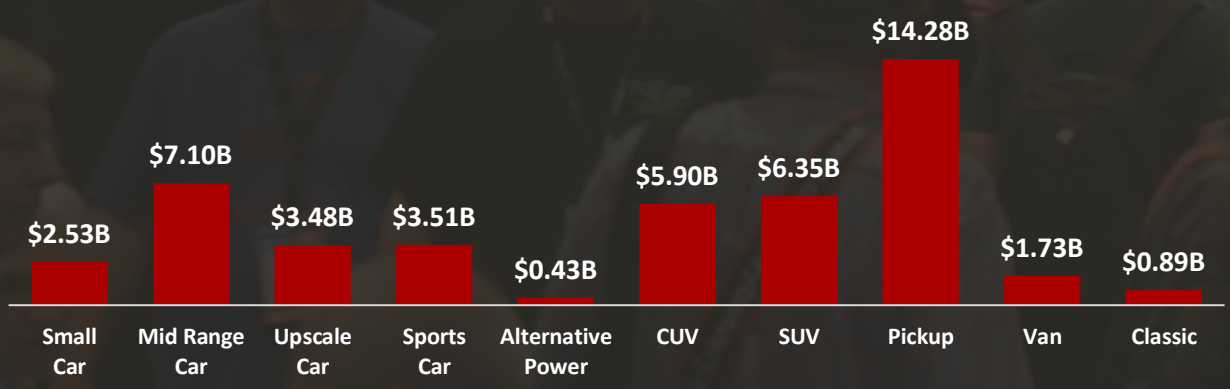
# TRUCKS AND SPORTS CARS DRIVE CUSTOMIZATION MARKET

## Hot Vehicle Models for Accessorization

Vehicle Make / Model (All Model Years)	Vehicles in Operation	Accessorization Rate
GM Full-Size Pickup	18.1M	30%
Ford F-Series	16.1M	30%
Ram Pickup	8.2M	29%
Jeep Wrangler	3.2M	39%
Ford Mustang	2.1M	34%

*Partial list. See later in report for more information and models.*

## 2019 Aftermarket Sales Estimates by Vehicle Segment



As both popular vehicles and versatile platforms for accessorization, pickups are the hottest models for the specialty-equipment industry.

- Pickups represent the largest share of the specialty-equipment market and account for nearly a third of all retail dollars spent in our industry. Full-size pickups, such as the Chevrolet Silverado 1500 and the Ford F-150, lead the way.
- Jeep Wranglers are some of the most accessorized vehicles on the road and attract significant interest from enthusiasts.
- Classics and sports cars are also highly accessorized and highly enthusiast platforms but are not as high volume as other segments.

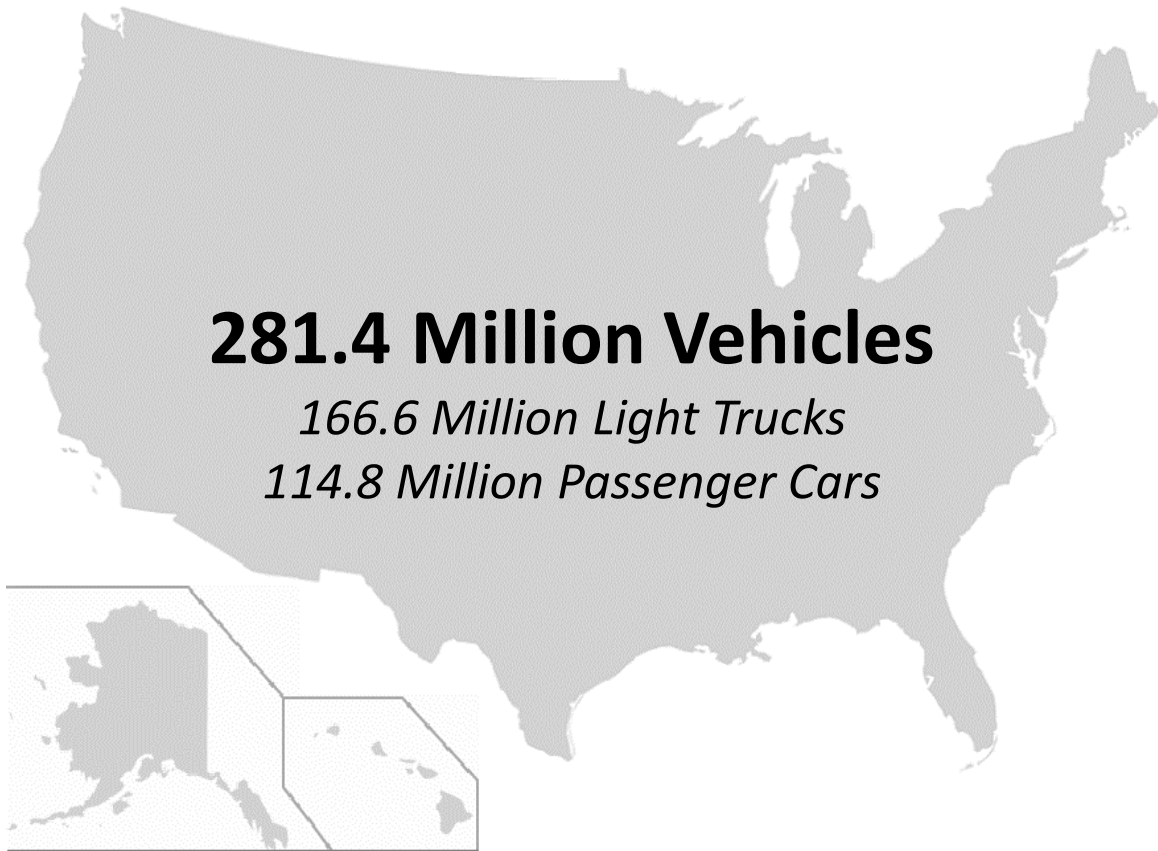


# OVERALL VEHICLE LANDSCAPE



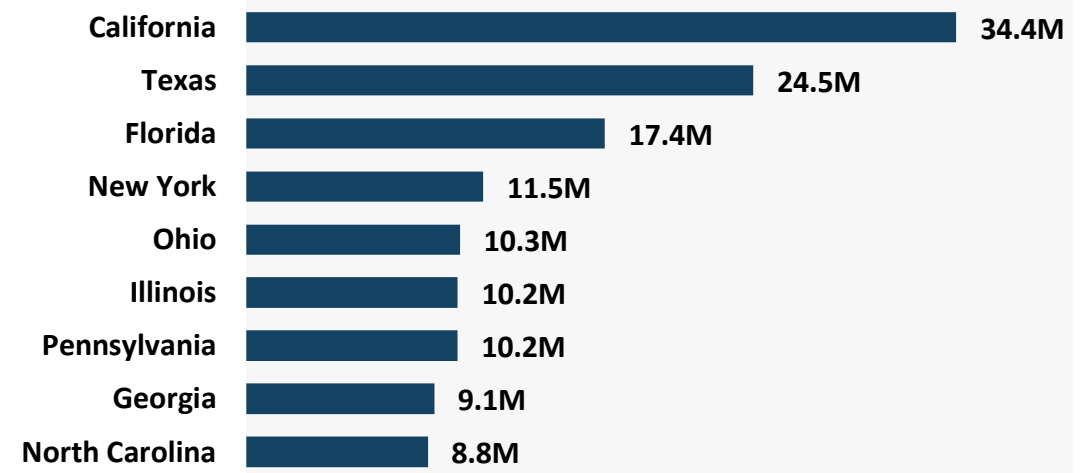


# HOW MANY VEHICLES ARE ON THE ROAD TODAY?

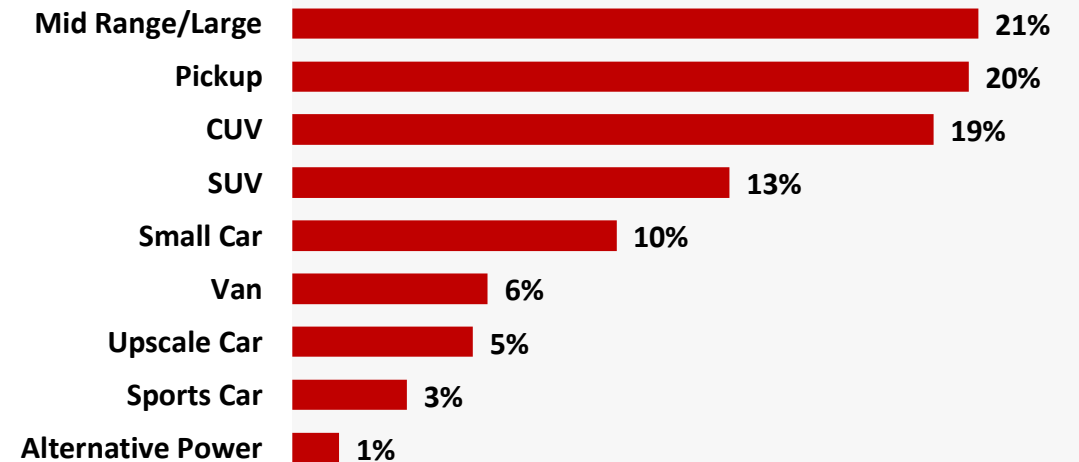


Note: Passenger vehicles, which excludes heavy-duty, commercial, and fleet vehicles.

## States With Highest Vehicle Populations



## Share of Vehicles on the Road



# WHAT VEHICLES ARE ON THE ROAD?

Current Registered Vehicles by Model Year

Data as of Q4 2020

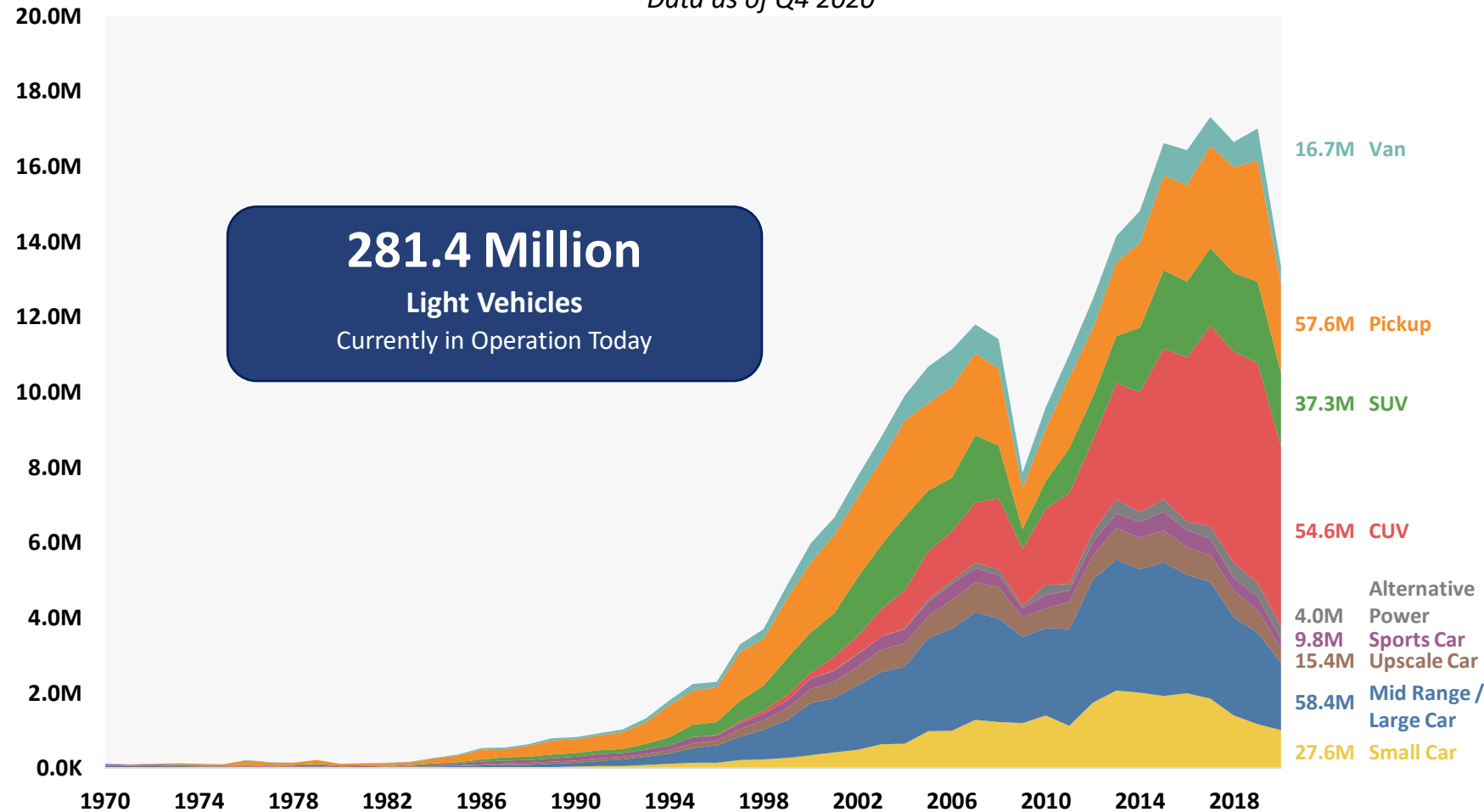


Chart does not show pre-1970 and 2021/2022 model years, but those are included in segment totals.

Vehicle preferences among Americans are changing. Light trucks (pickups, SUVs, CUVs and vans) are becoming a larger share of the overall vehicle population, as OEMs shift their production away from passenger cars to more profitable light truck platforms. This has been largely driven by the explosion in popularity of CUVs. Pickups and SUVs, staples for the specialty-equipment industry, remain popular on the road and among enthusiasts.

CUVs are the fastest-growing light vehicle segment. There are over 130 models currently on the road, and more models are expected in the coming years. This diversity makes it a difficult segment to make aftermarket parts for. Why are they so popular? The CUV is the perfect blend of performance, efficiency and functionality for consumers. Automakers are pushing light trucks, like CUVs, as they are also more profitable.

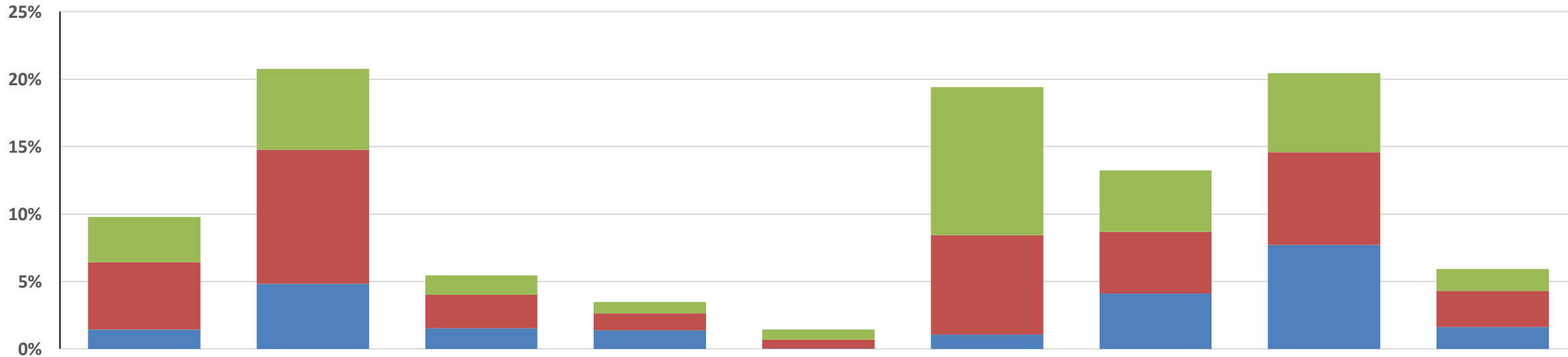
Alternative energy vehicles, like electrics, remain a very small percentage of the population. While their sales are increasing, it will be a long time before they represent a significant proportion of vehicles on the road.

Passenger cars aren't going away just yet. Even as more light trucks are sold, they represent a huge proportion of vehicles on the road currently and it will take a while for them to cycle out.



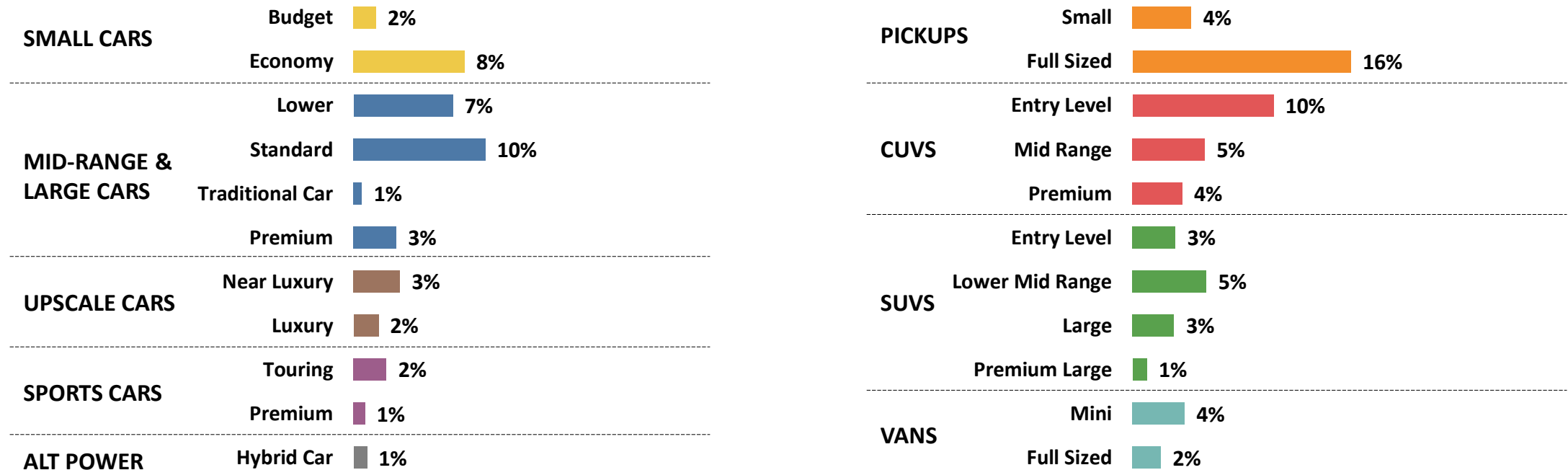
# VEHICLE PREFERENCES HAVE SHIFTED OVER TIME

Model Years	Small Car	Mid Range / Large	Upscale	Sports Car	Alternative Power	CUV	SUV	Pickup	Van
2015-Present	9.48M	16.84M	4.05M	2.35M	2.06M	30.87M	12.82M	16.53M	4.59M
2005-2014	14.01M	28.01M	7.04M	3.56M	1.90M	20.72M	12.86M	19.35M	7.44M
Pre-2005	4.08M	13.57M	4.29M	3.88M	61K	3.03M	11.56M	21.69M	4.62M



# FULL-SIZED PICKUPS ARE THE LARGEST SEGMENT

Share of U.S. Light Vehicle Registrations by Specific Segment



Note: Vehicle subsegments accounting for <0.5% of the total vehicle population are not shown.

Full-size pickups are the most common vehicle subsegment on the road today, driven primarily by the popularity of the Ford F-series and GM full-size pickups. Entry-level CUVs are also quite common. Despite their growing popularity, alternative energy remains a very small proportion of the U.S. light vehicle fleet—the most common being hybrid cars. There are significant factors that limit their growth, including infrastructure, that at least for the short term will prevent more large-scale, mainstream adoption.

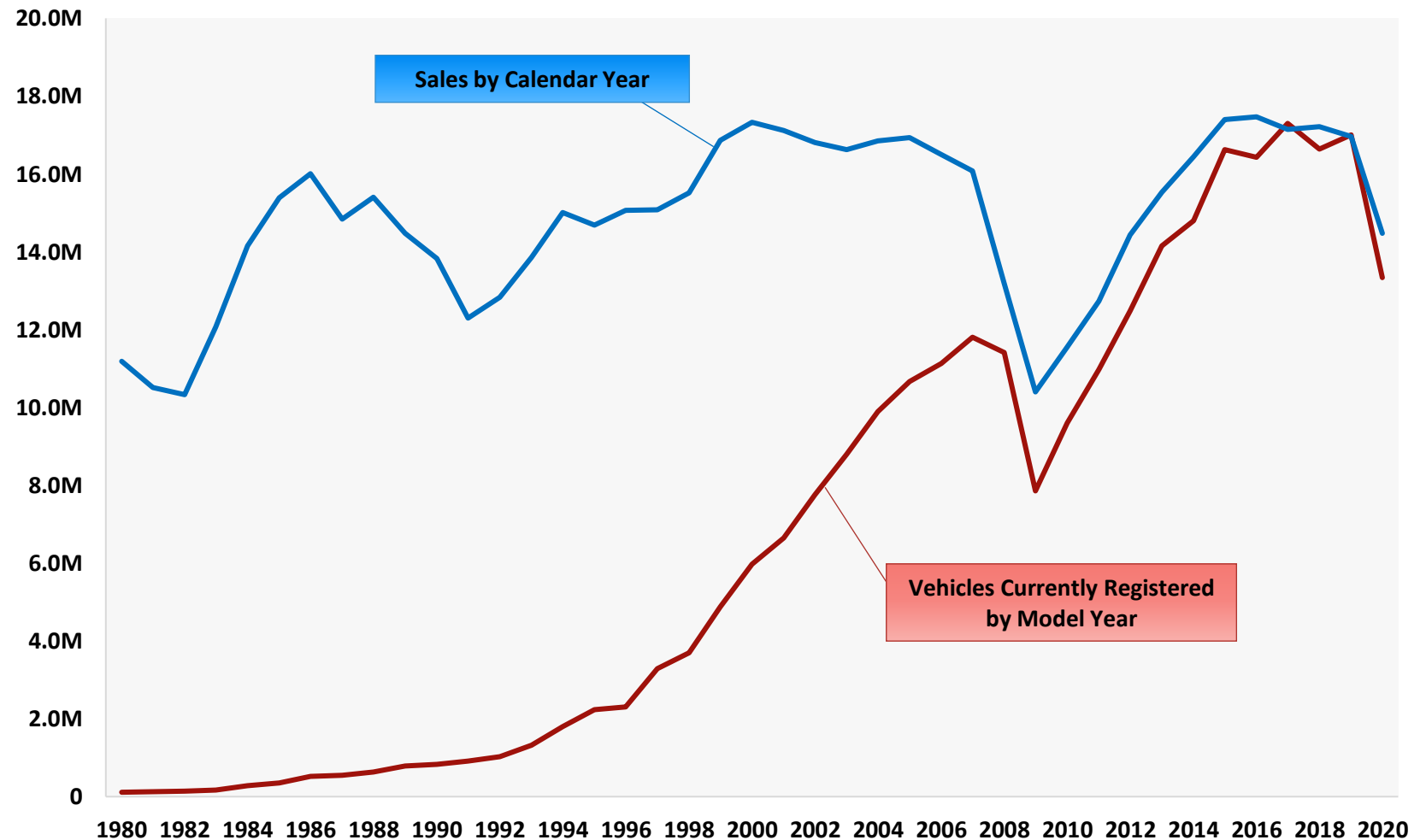


# NEWER VEHICLES ARE THE MAJORITY OF THE MARKET

Most of the over 281 million light vehicles in operation today are less than 20 years old. Around 90% of all vehicles are model year 2000 and newer. Over half are model year 2011 or newer.

After about 10 years, the number of vehicles on the road for a given model year begins to drop exponentially as the vehicle scrappage rates increase. During traditional recessions, consumers tend to hold onto their vehicles longer to save money until the economy recovers. The COVID-19 recession has been an exception. While sales were disrupted severely at the beginning of the pandemic, they have bounced back and will likely return to pre-pandemic levels within the next few years. Despite the pandemic, consumers think it's a good time to buy a car and most are willing to get rid of their old one.

As a result, the biggest opportunities for the specialty-equipment industry remain in newer vehicles. While older vehicles get significant engagement within our industry, this vehicle population will continue to shrink.



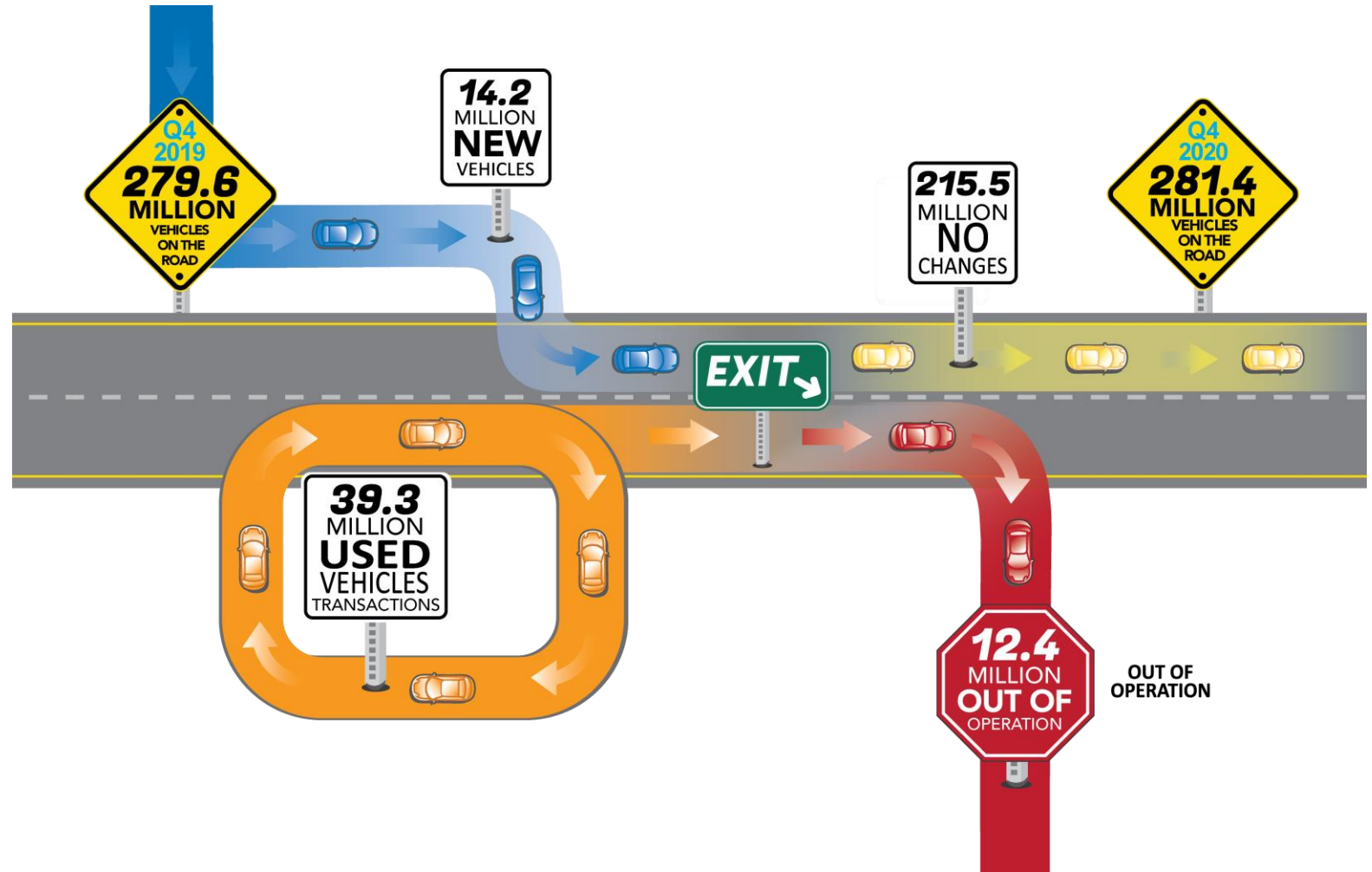
Note: Only data through the end of 2020 shown.

# VEHICLES DROP IN AND OUT OF OPERATION

Every year, the ownership of passenger cars and light trucks changes. As newly sold vehicles are registered, millions are also taken off the road. The used market generally sees millions of transactions each year. The pandemic has not been an exception. Despite the disruption from the virus, the vehicles coming in new still outpace the number leaving.

During recessions, used car values tend to skyrocket as consumers hold onto their vehicles—putting strain on the supply. COVID-19 has driven used car prices to record highs. Despite this, used car transactions in 2020 were only off about 3-4 million from where they typically are. Typically, between 12.5 million and 13.5 million go out of operation each year. While 2020 saw a slight dip in this, it wasn't far off. Some consumers are certainly holding onto their cars longer, but not as many as the Great Recession in 2008-2009.

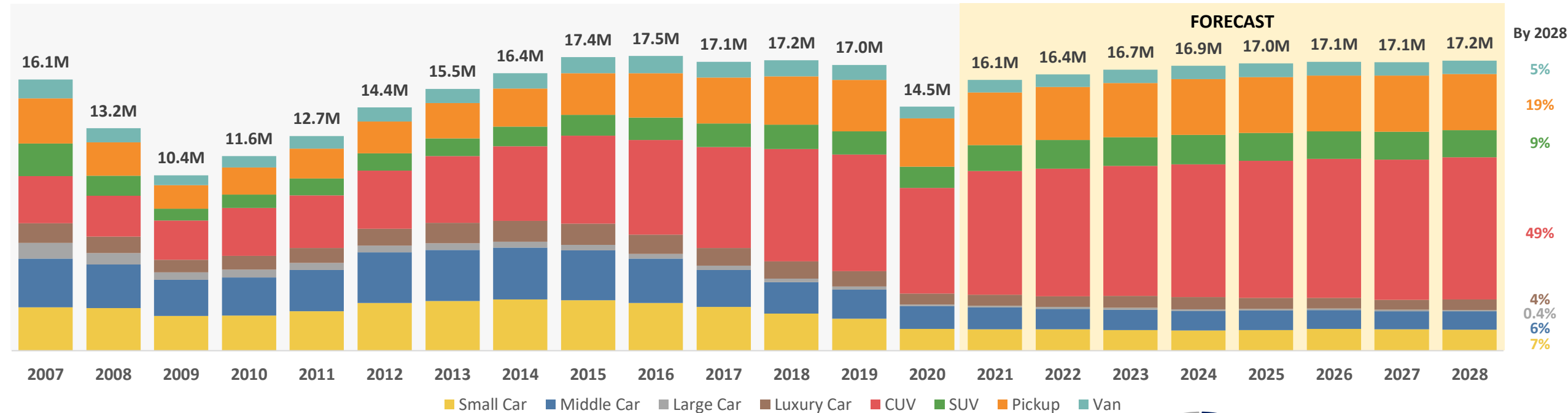
This bodes well for our industry as it looks to quickly recover from the pandemic disruption. While accessorization can happen at any time during a car's lifecycle, most vehicle owners upgrade or modify their car within the first few months of getting it, new or used. The more cars change hands, the more chances for accessorization.





# CUVS DOMINATE SALES, BUT PICKUPS REMAIN POPULAR

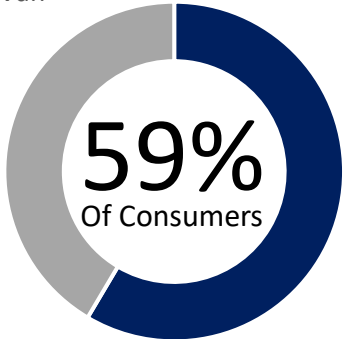
## U.S. New Light Vehicle Sales Forecast



During a typical recession, the biggest drops in vehicle sales are often seen in larger, more expensive models—especially SUVs and Pickups. The complete opposite has been true during the pandemic: Pickups and CUVs carried light vehicle sales in 2020. While certainly disruptive, the pandemic has not affected sales as much as initially thought, and sales should fully recover within the next few years. Most consumers actually think it's a good time to buy even though new vehicle prices have increased to a record high of over \$41,000. Much of this growth is driven by light trucks, with CUVs expected to account for nearly half of all vehicles sold by 2028.

**\$41,066**  
Average New Car Price in Feb 2021  
**+6.5% vs. Feb 2020**

*Does not include applied consumer incentives*



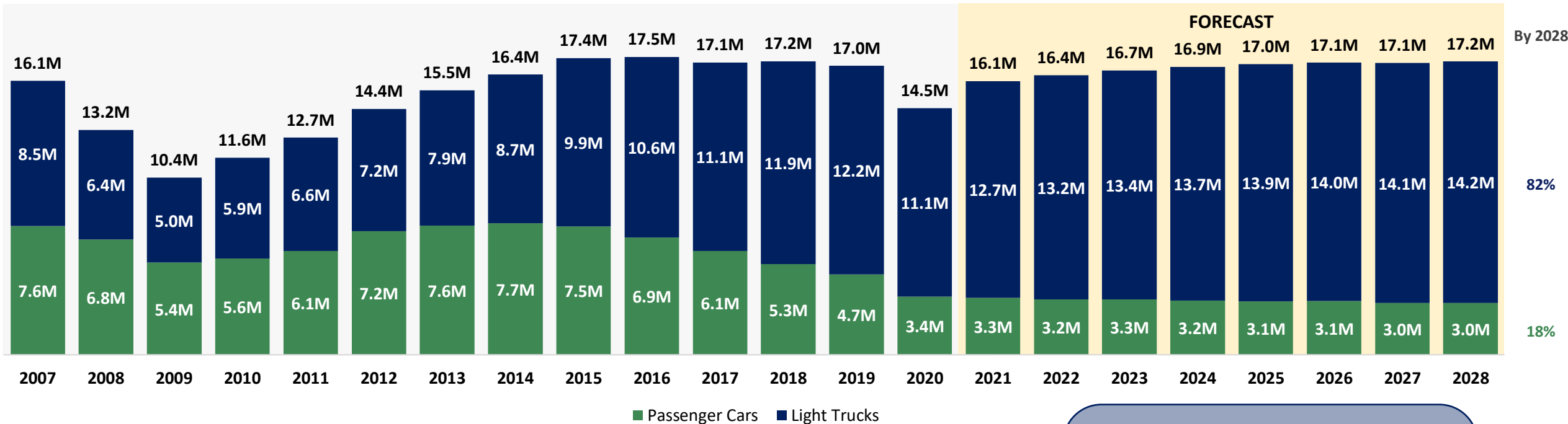
Think it's a good time to buy a car.

January 2021  
University of Michigan

Source: ©2021 Wards Intelligence, a division of Informa. Data as of March 2021.  
Source: Kelly Blue Book's average monthly transaction price for February  
Source: University of Michigan, "Survey of Consumers", January 2021.

# THE SHIFT FROM CARS TO LIGHT TRUCKS

New Light Vehicle Sales by Vehicle Type



Back in 2007 and 2008, passenger cars and light trucks each represented about half of all new light vehicles sold in the United States. By 2020, the share of light trucks grew to roughly 76%. SEMA Market Research anticipates this growth to continue over the next decade as vehicle manufacturers prioritize their light truck models.

Much of this shift can be attributed to the growth and popularity of CUVs. There are over 130 models currently on the road and more than 170 models are expected to sell between 2021 and 2028. Consumers want the performance of a car but the functionality of a utility vehicle, and a CUV has both. Light trucks also tend to be more profitable for manufacturers, which gives added incentive to push these vehicles.

**CUVs have driven the growth of light truck sales:**

**130+**

CUV Models Currently on the Road

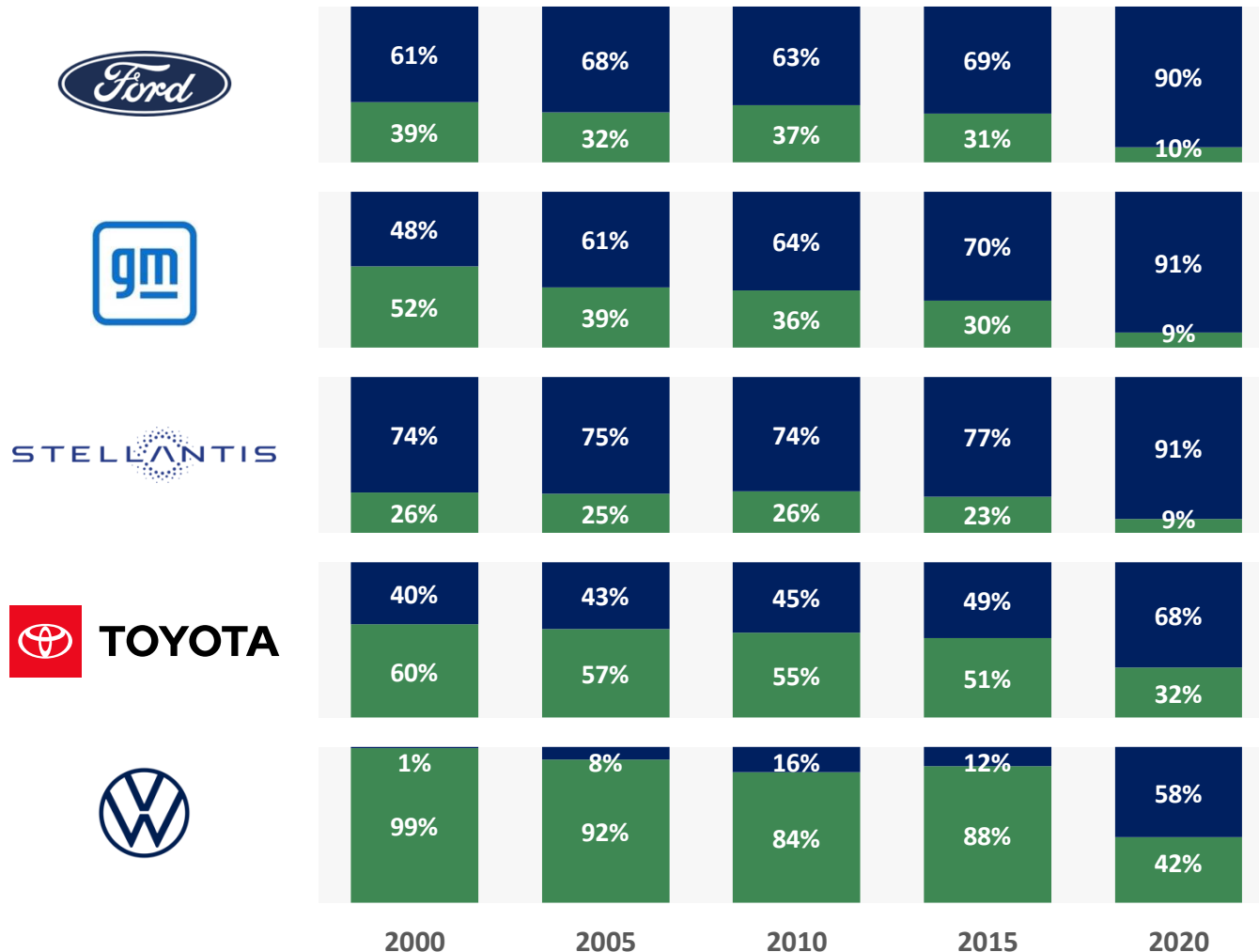
**More Than 170**

CUV Models Projected to be sold from 2021-2028



# AUTO MANUFACTURERS ARE ALL IN FOR LIGHT TRUCKS

Share of U.S. OEM Light Vehicle Sales by Type



In 2019, General Motors sold 80 light vehicle models around the world. Yet, 80% of their global revenue came from just five vehicles: Chevrolet Silverado, Chevrolet Tahoe, Chevrolet Equinox, GMC Sierra, and Buick GL8 (a minivan model in China). It's clear that consumers don't just prefer light trucks, they're more profitable for the automakers to make and sell.

Most automakers have made producing light trucks a priority. In 2018, Ford announced it would wind down both the production and sales of passenger sedans. By 2020, 90% of Ford's U.S. sales were from light trucks. The only true passenger car the company continues to make is the Mustang. GM also trimmed its sedan lineup across its brands. In five years, the automaker went from offering 13 sedan models to just three as of October 2020: Chevrolet Malibu, Cadillac CT4, and Cadillac CT5. Stellantis, formerly Fiat Chrysler America (FCA), has also focused on light trucks as well.

Not all automakers have made the same drastic shift away from sedans. Hyundai offers 11 sedans across its brands. Nearly a third of Toyota's sales and over 40% of Volkswagen's are from passenger cars.

While new vehicle sales are primarily from light trucks, passenger cars are not going away. They will remain a significant presence on American roads for years to come.

■ Light Trucks  
■ Passenger Cars

Source: ©2021 Wards Intelligence, a division of Informa. Data as of March 2021.

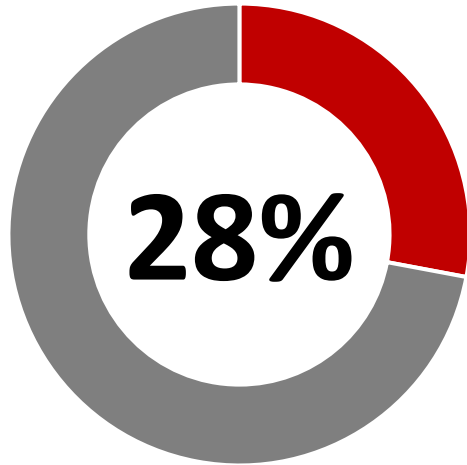
Source: MotorBiscuit, "Ford and GM Waste a Lot of Money on Vehicles that Aren't Trucks and SUVs". June 21, 2020.

# OPPORTUNITY FOR THE AFTERMARKET





# OUTLOOK FOR THE SPECIALTY-EQUIPMENT INDUSTRY

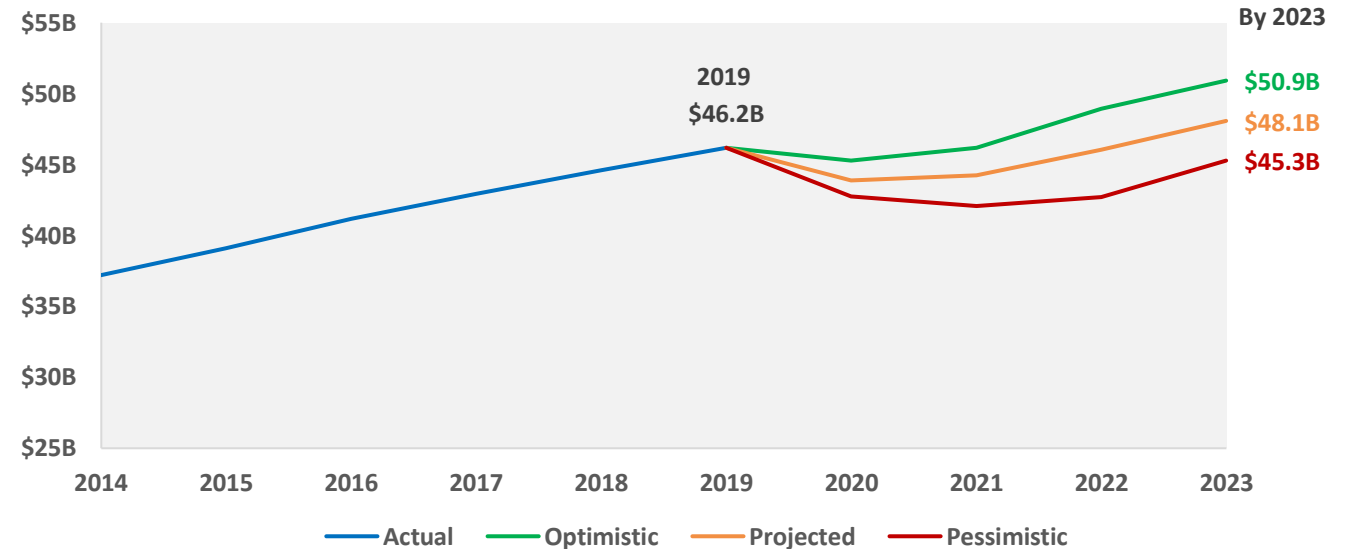


**28% of Drivers Purchase Specialty-Equipment Parts Each Year**  
*35.9 Million Households Each Year*

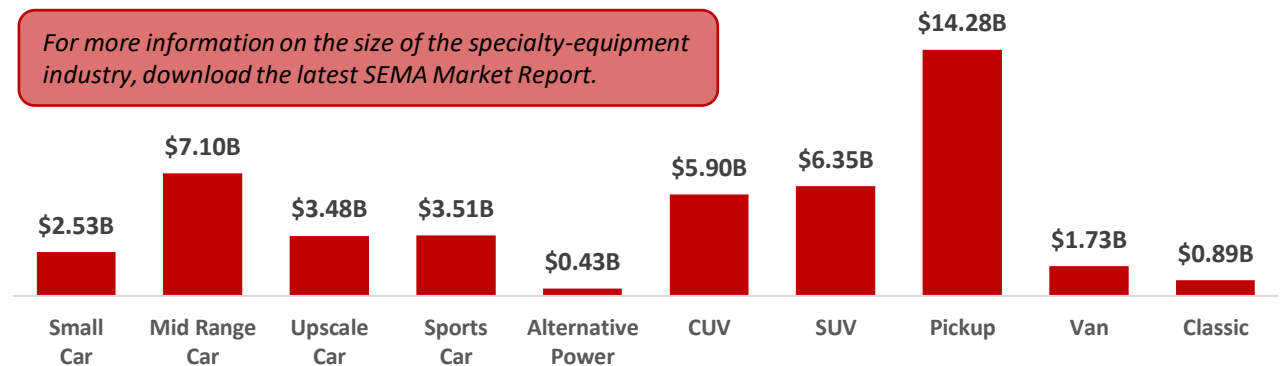
Like many sectors of the economy, our industry was affected by the economic downturn from the pandemic. Some companies saw significant sales declines. Others reported record sales last year, as many consumers continued to purchase parts and work on their vehicles while at home.

We anticipate that the effects on our industry will be short-term and should return to pre-pandemic levels and growth by 2023.

Specialty-Equipment Market Size Forecast

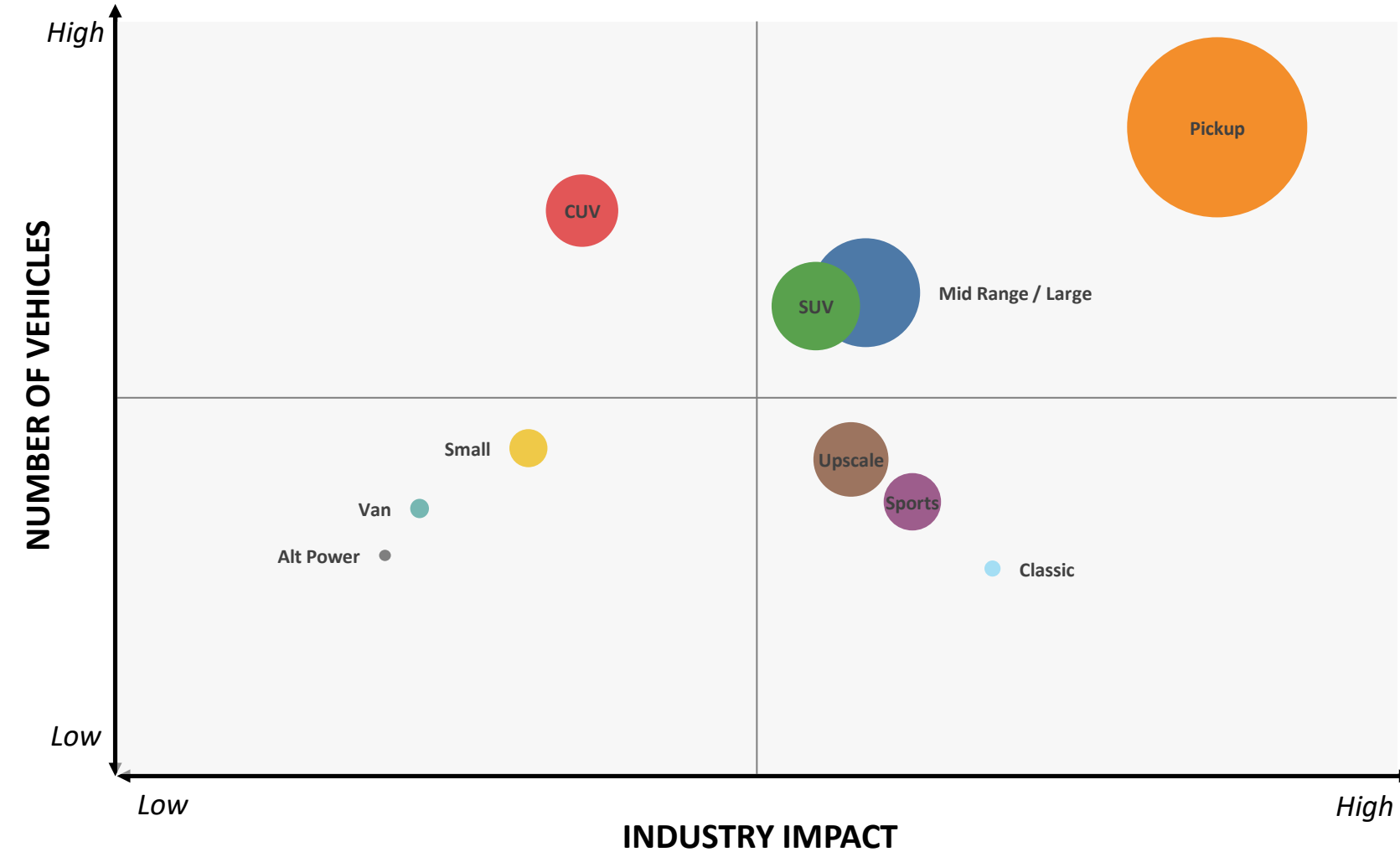


2019 Aftermarket Sales Estimates by Vehicle Segment



For more information on the size of the specialty-equipment industry, download the latest SEMA Market Report.

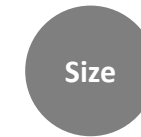
# WHAT SEGMENTS HAVE THE MOST OPPORTUNITY?



Pickups are the largest segment for the specialty-equipment industry, accounting for 31% of retail sales. They are some of the top-selling vehicles and offer versatile platforms for accessorization. Classics and sports cars are also frequently modified but there are fewer on the road.

CUVs are well represented on the road, but are, so far, less accessorized than other segments. The diversity of platforms and models makes them a difficult segment to develop aftermarket products for.

Alternative power vehicles remain low volume and are not widely accessorized. While they are expected to grow over the next few years, their applications and market upside for our industry remain limited at this time.



The size of the circle represents the share of specialty-equipment retail dollar.

For more information on what segments and models have the most opportunity for our industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.



# PICKUPS, SPORTS CARS AND CLASSICS DRIVE THE MOST SALES FOR THE SPECIALTY-EQUIPMENT INDUSTRY

Changes in Vehicle Segment Sales Over Past 12 Months

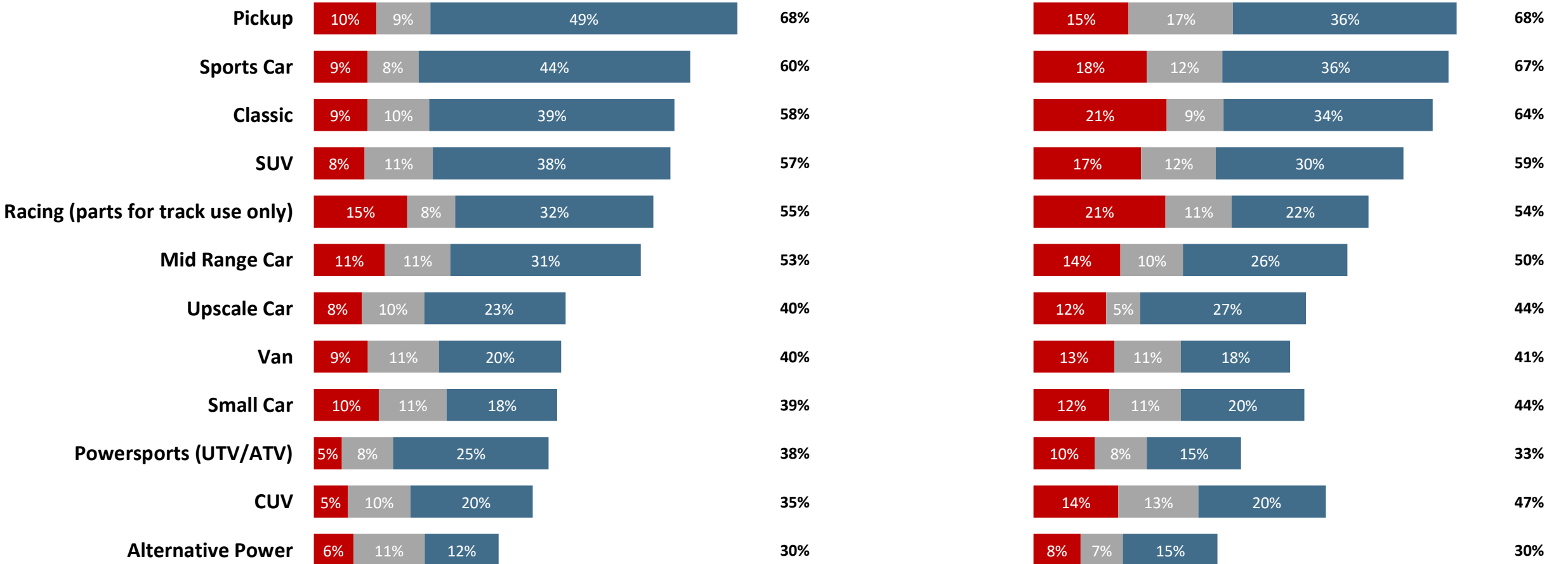
● Decreased  
● Stayed Same  
● Increased

 **Manufacturers**

% Sell to Segment

 **Retailers/Installers**

% Sell to Segment



# WHAT MODELS HAVE THE BIGGEST OPPORTUNITY?

Full-sized pickups are among the hottest vehicles for our industry. They are great platforms for enthusiast upgrades and functional modifications, are the most common vehicles on the road today, and are expected to sell well in the future. Electric and other alternative energy drivetrains are expected for future full-size trucks, opening potential opportunities and challenges for the aftermarket.

Jeep Wranglers are also popular platforms for enthusiasts, especially those that go off-roading. They are among the most accessorized vehicles on the road today. However, they are much lower volume than full-size pickups. A hybrid Jeep Wrangler (4xe) is expected to roll out this year and may see significant engagement from the aftermarket industry.

Sport cars tend to be highly accessorized, particularly the modern American muscle cars (Mustang, Camaro, Challenger and Corvette). The aftermarket potential for the new electric Mustang Mach-E CUV, however, is still to be determined.

*For more information on what the hottest vehicles are for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.*

## SEMA Top Vehicles for Accessorization

Vehicle Make / Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2028)
GM Full-Size Pickup*	18.1M	30%	6.6M
Ford F-Series	16.1M	30%	6.7M
Ram Pickup	8.2M	29%	4.9M
Jeep Wrangler	3.2M	39%	1.6M
Ford Mustang*	2.1M	34%	538K
Chevrolet Tahoe / GMC Yukon	4.0M	28%	1.4M
Chevrolet Camaro*	1.3M	38%	224K
Dodge Challenger*	594K	39%	160K
Chevrolet Corvette	824K	30%	14K
Toyota 4Runner	2.0M	33%	1.2M

*\*Some models include rebadged variants and other similar models. See index.*



# THE SEMA AWARD

The SEMA Award celebrates the cars, trucks and SUVs that aftermarket manufacturers are investing in and developing products and accessories for. Presented each year at the SEMA Show, the award is an opportunity for the industry to indicate which vehicles they feel are the most customizable. Here are some of the previous winners.



*Jeep Wrangler JL*



*Neil and Collin Tjin Ford Mustang Coupe*

## Car/Coupe

<b>2010-2011</b>	<i>Chevrolet Camaro</i>
<b>2012-2016</b>	<i>Ford Mustang</i>
<b>2017</b>	<i>Chevrolet Camaro</i>
<b>2018-2019</b>	<i>Ford Mustang</i>

## Sports Compact/Hatch

<b>2011</b>	<i>Fiat 500</i>
<b>2012-2013</b>	<i>Scion FRS</i>
<b>2014</b>	<i>Honda Fit</i>
<b>2015-2018</b>	<i>Ford Focus</i>
<b>2019</b>	<i>Audi RS3</i>

## Truck

<b>2010-2013</b>	<i>Ford F-Series</i>
<b>2014</b>	<i>Chevrolet Silverado</i>
<b>2015-2018</b>	<i>Ford F-Series</i>
<b>2019</b>	<i>Chevrolet Silverado</i>

## Sedan

<b>2016</b>	<i>Dodge Charger</i>
<b>2017</b>	<i>Cadillac CTS-V</i>

## SUV/4x4/Off-Road

<b>2010-2019</b>	<i>Jeep Wrangler</i>
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## Powersports

<b>2018-2019</b>	<i>Polaris RZR</i>
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# DRIVING METRICS

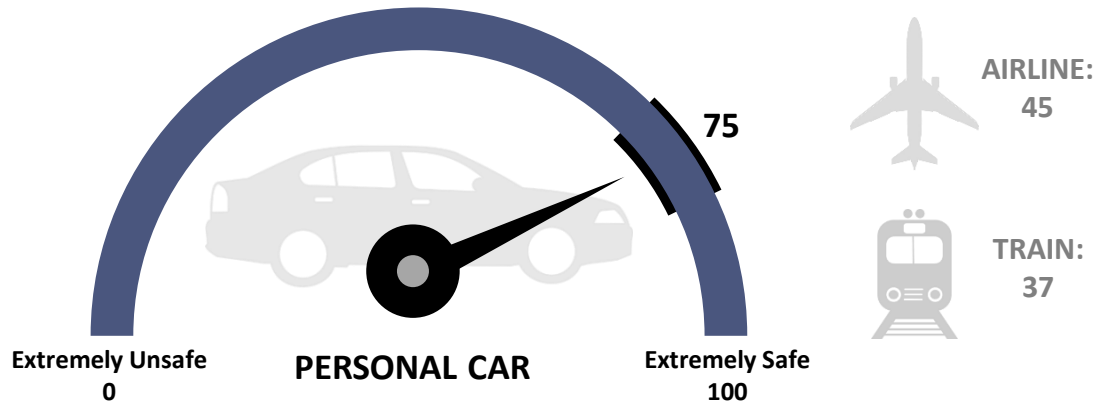




# HOW HAS COVID-19 AFFECTED DRIVING?

## How Americans Feel About Traveling by Transportation Method

Source: MMGY Global Travel Safety Barometer; December 7, 2020



In 2020 Americans Drove

# 2.83 TRILLION MILES

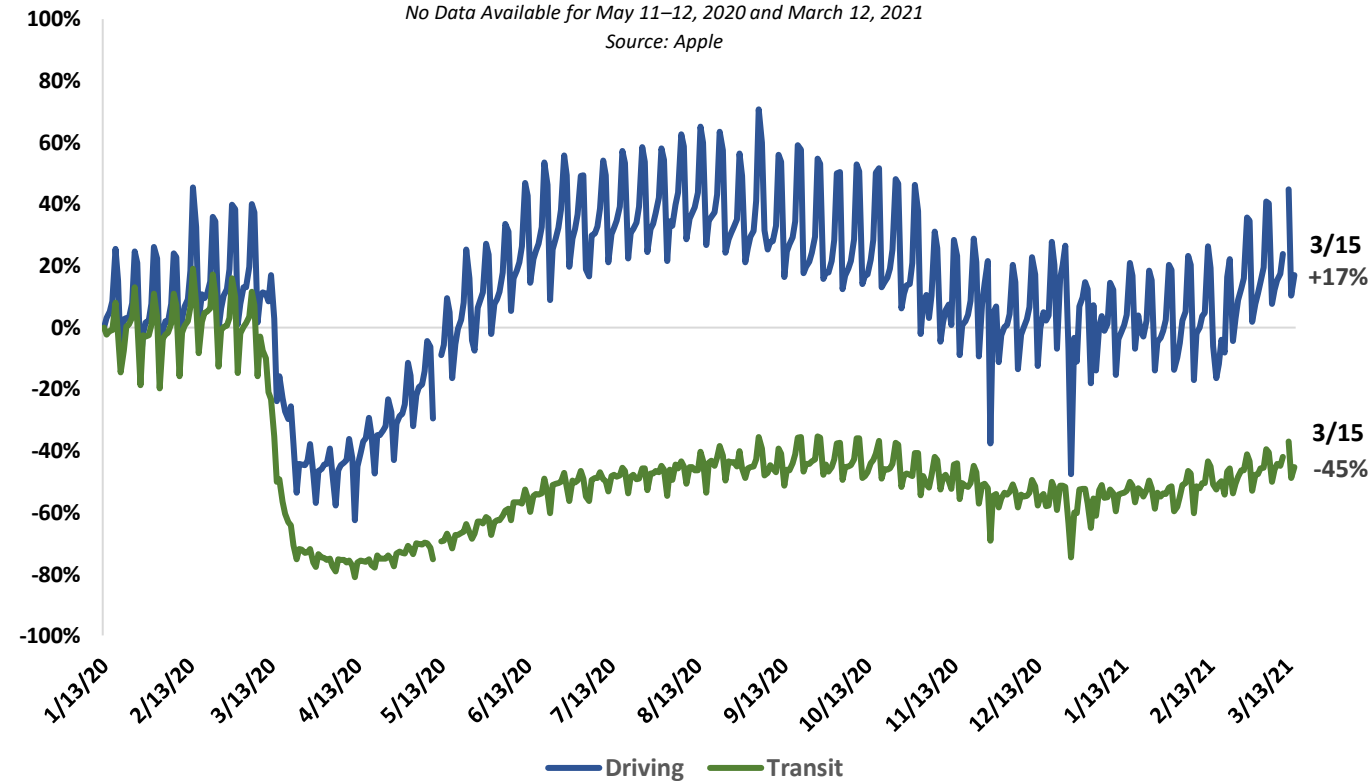
Down 13% from 2019

The pandemic had a significant effect on how much people drove in 2020. It will likely take until at least 2022 before Americans return to their pre-pandemic travel and driving levels.

Source: Department of Transportation, Federal Highway Administration

## Change in Apple Directions Requests Compared to January 13, 2020

No Data Available for May 11–12, 2020 and March 12, 2021  
Source: Apple



Overall, driving mileage was down in 2020, though not as steep a drop as might have been expected. American consumers consider their personal vehicle the safest way to travel as we emerge from the pandemic, which may lead to more road trips and additional vehicle miles. This bodes well for the specialty-equipment industry—the more people drive, the more likely they are to want new parts.

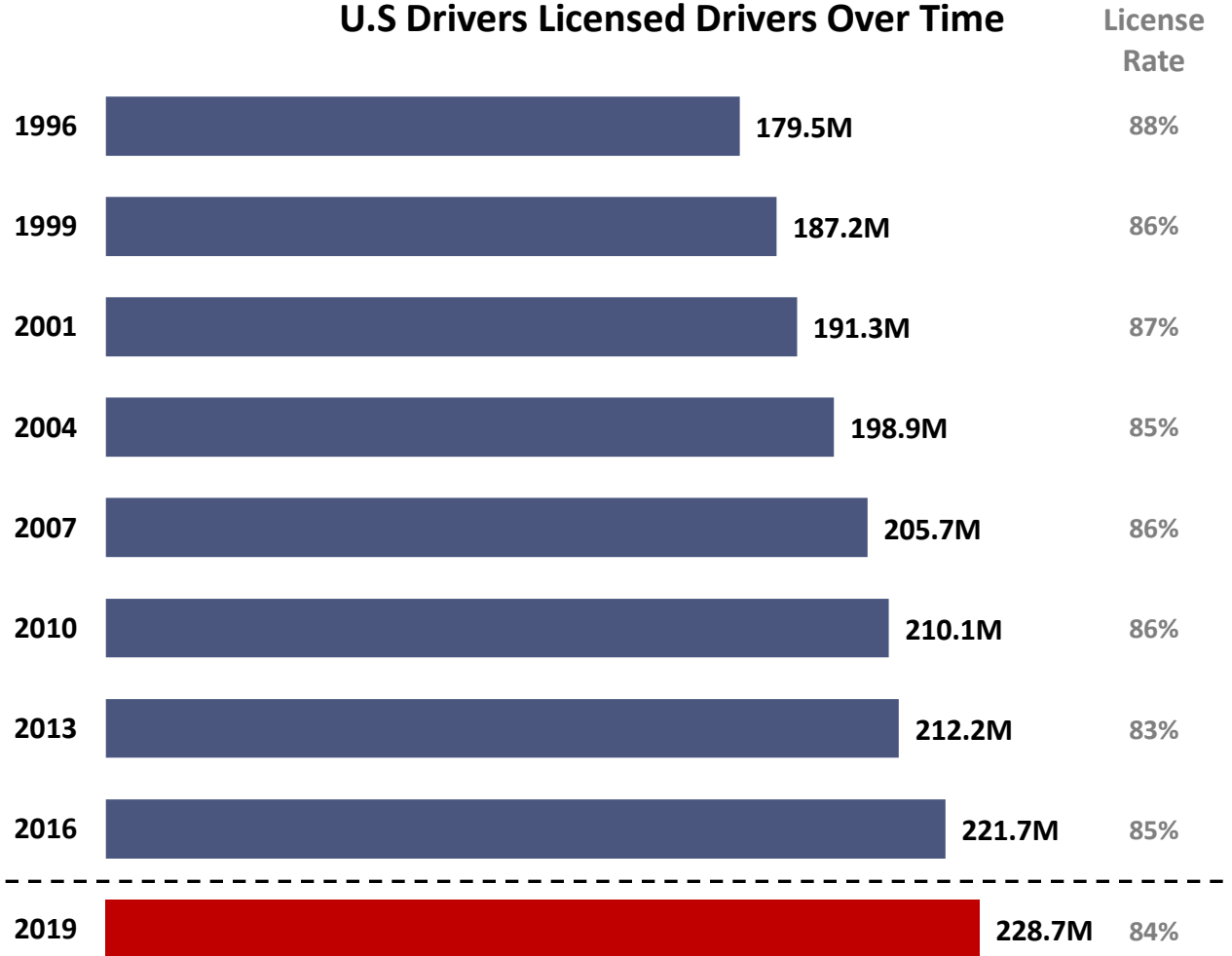
Source: MMGY Global, "Travel Safety Barometer". Data as of December 7, 2020.

Source: Department of Transportation, Federal Highway Administration, "Traffic Volume Trends: January 2021". Data as of March 18, 2021.

Source: Apple, "Mobility Trends Report". Data through March 15, 2021.

# THERE ARE MORE DRIVERS TODAY THAN EVER BEFORE

U.S Drivers Licensed Drivers Over Time



Share of U.S. Licensed Drivers by Age

2019

Age 16-24	11%
Age 25-34	18%
Age 35-44	17%
Age 45-54	17%
Age 55-64	17%
Age 65+	20%

Over 228 million people were licensed drivers in 2019—the highest number of licensed drivers in history. A common perception is that Americans are no longer driving or getting their license, particularly young people. While it's true that licensing restrictions have reduced the number of 16-year-old drivers, compared to 30 years ago, the overall driver composition is still similar.

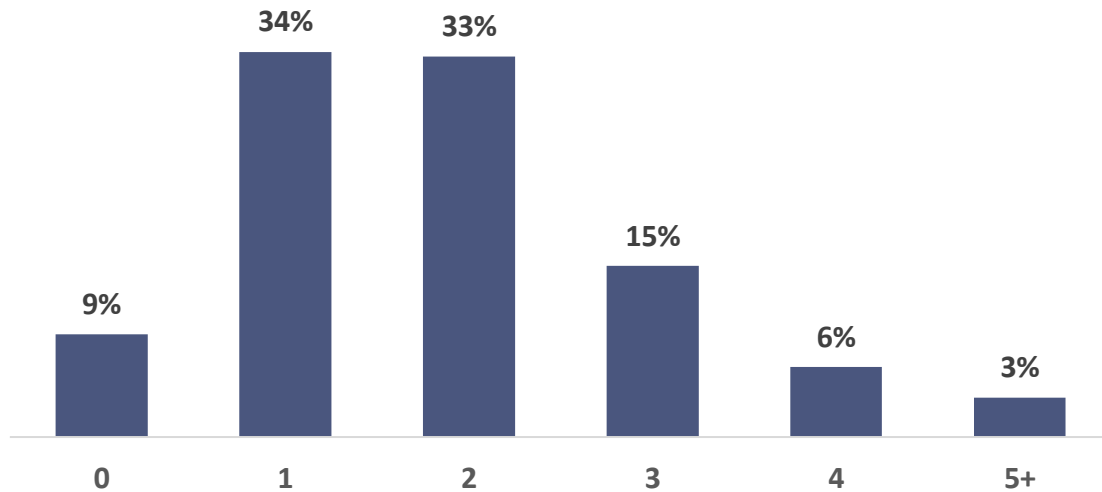
For more information on young drivers and accessorizers, download the SEMA Young Accessorizers report.



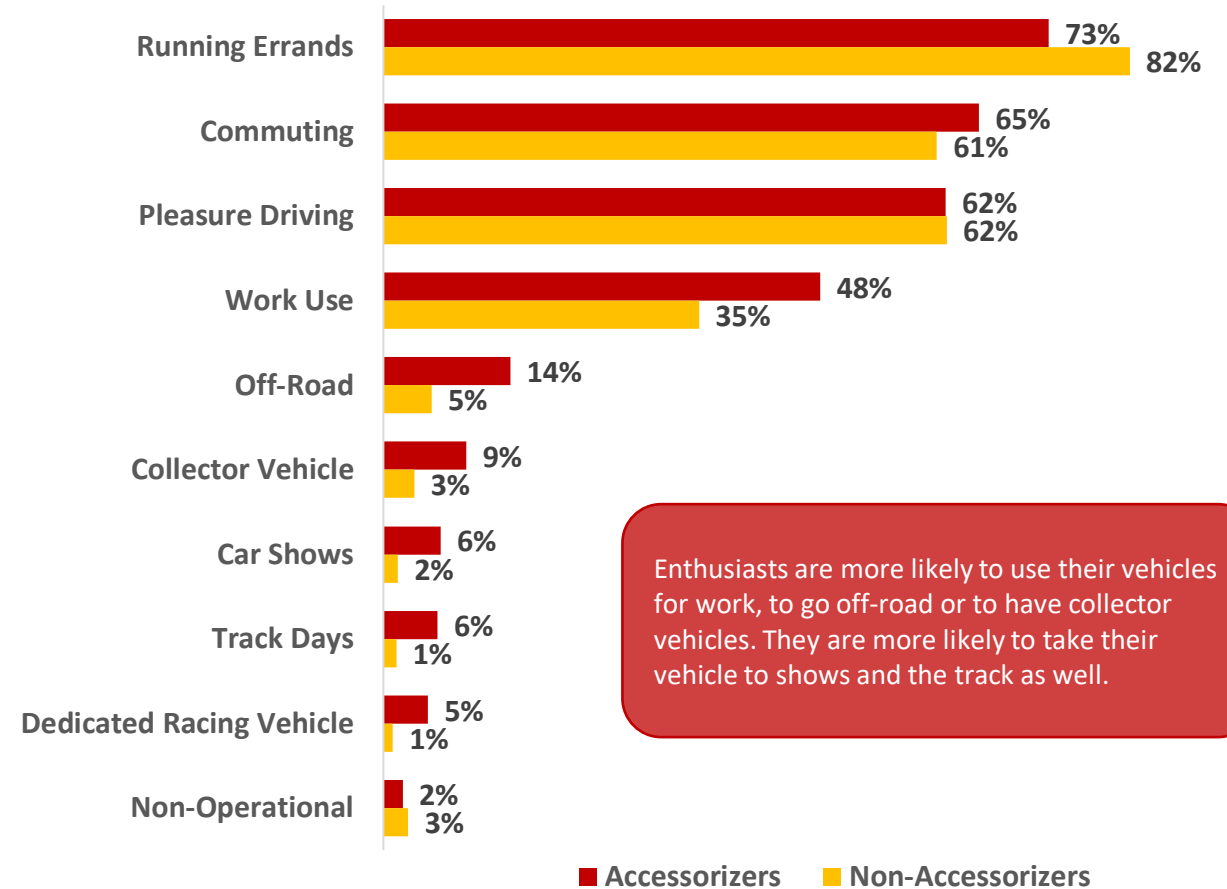
# HOW DO AMERICANS USE THEIR VEHICLES?

## Number of Vehicles Per American Household

On average, there are  
**1.88 Vehicles**  
 per American household



## How Americans Use Their Vehicles



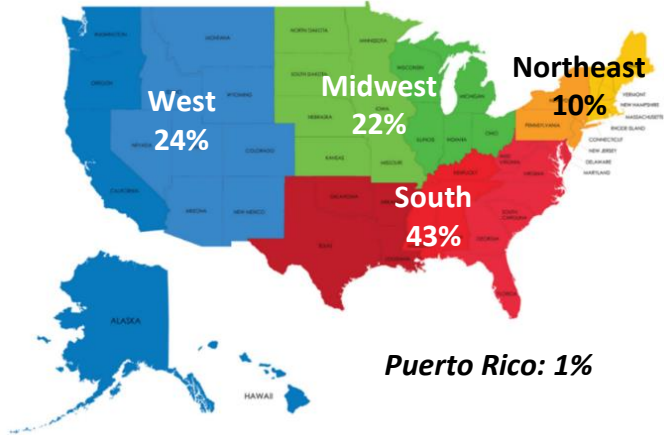
Enthusiasts are more likely to use their vehicles for work, to go off-road or to have collector vehicles. They are more likely to take their vehicle to shows and the track as well.

■ Accessorizers ■ Non-Accessorizers



# PICKUPS

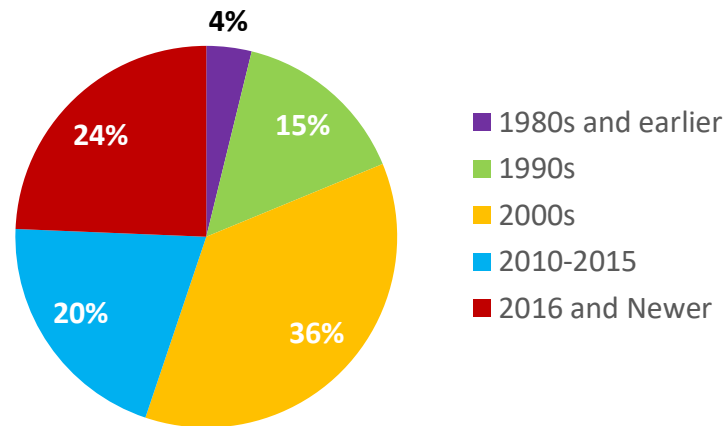
# PICKUPS IN THE UNITED STATES



**57.6 Million Registered in the United States**  
*20% of all vehicles on the road*

Top 5 States for Pickups	
Texas	6.6M
California	5.6M
Florida	2.9M
Georgia	2.0M
North Carolina	1.9M

## Vehicle Age



Top Registered Pickup Models	
Ford F-Series	16.1M
GM Full-Size Pickup*	18.1M
Toyota Tacoma	3.5M
Ram Pickup	8.2M
Ford Ranger*	2.5M
Toyota Tundra	2.1M
Nissan Frontier*	1.2M
GM Mid-Size Pickup*	2.6M
Dodge Dakota	981K
Nissan Titan	569K

\*Some models include rebadged variants and other similar models. See index.



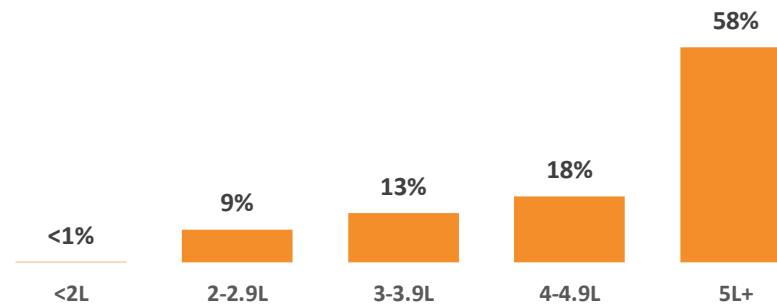
# PICKUP PROFILE AND FUTURE SALES

Full-size pickups—the Ford F-Series, the GM Full-Size, and Ram—are the top-selling vehicle models in the U.S. Pickups are expected to continue to grow over the next decade and remain solid, reliable platforms for the aftermarket. The new Jeep Gladiator and several mid-sized models, while still new, have attracted a lot of enthusiast interest already.

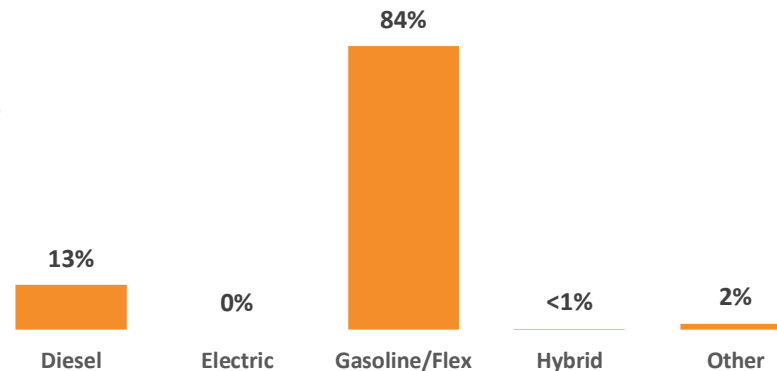
Alternative energy powertrains are on the horizon for pickups. The new 2021 F-150 includes a model with a 3.5L full-hybrid V6 engine. Further electric and hybrid models are also planned for the Ford F-Series, GMC Sierra, Chevrolet Silverado, and Ram pickups. New entrants into the pickup space, including Tesla and Rivian, plan on releasing electric pickups in the next year or two. A new electric Hummer pickup will be released soon as well.

Will people buy electric trucks? Will owners accessorize these new vehicles in the same way or as frequently? How will this affect the aftermarket? These will be important questions for our industry moving forward.

### Engine Displacement Profile of Current Pickups



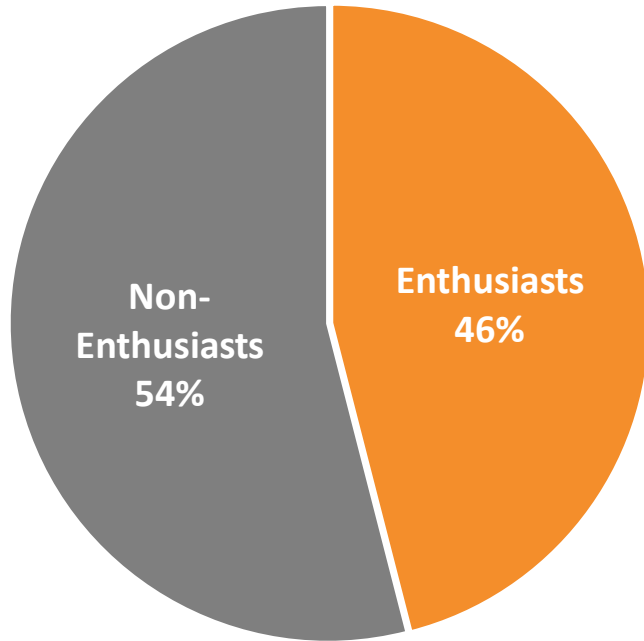
### Powertrain Breakdown of Current Pickups



### Top-Selling Projected Models 2021-2028

Ford F-Series	6.7M
Chevrolet Silverado/GMC Sierra	6.6M
Ram Pickup	4.9M
Toyota Tacoma	2.3M
Chevrolet Colorado/GMC Canyon	1.2M
Toyota Tundra	1.0M
Ford Ranger	780K
Jeep Gladiator	588K
Nissan Frontier	520K
Honda Ridgeline	282K

# PICKUP ACCESSORIZATION PROFILE



Share of Pickup Owner  
Accessorizers in 2019

**\$14.28 Billion**  
Overall Market Size

**31%**  
Share of Specialty-Equipment Retail  
Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Wax and Cleaning Products

Body Finishing Products

Head/Tail Lights

Trailer and Towing Products

Exterior Appearance Upgrades

Brake Products

Truck Bed Liners and Other Bed Accessories

Suspension Products

Fender, Hood and Body Upgrades

# WHAT ARE THE HOTTEST PICKUPS FOR OUR INDUSTRY?

Given their versatility and overall volume on the road, pickups represent the largest market for the specialty-equipment industry and account for nearly a third of all aftermarket retail sales in the United States. GM full-size pickups and the Ford F-Series lead the pack, led by the half-ton Chevrolet Silverado 1500 and Ford F-150. These two models continue to be among the highest-selling vehicles year after year and are great platforms for accessorization. The Ram pickup has also proven to be extremely popular.

While lower in sales volume, there are a range of other pickups that are also popular among enthusiasts.

*For more information on the hottest vehicles for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.*

## SEMA Hot Pickups for Accessorization

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2028)
GM Full-Size Pickup*	18.1M	30%	6.6M
Ford F-Series	16.1M	30%	6.7M
Ram Pickup	8.2M	29%	4.9M
Toyota Tacoma	3.5M	25%	2.3M
Toyota Tundra	2.1M	28%	1.0M
GM Mid-Size Pickup*	2.6M	20%	1.2M
Nissan Titan	569K	34%	218K
Ford Ranger*	2.5M	15%	780K
Dodge Dakota	981K	22%	<b>Discontinued</b>
Nissan Frontier*	1.2M	20%	520K

*\*Some models include rebadged variants and other similar models. See index.*



# AMERICAN FULL-SIZE PICKUPS ARE KING



Ford

## Ford F-Series



GM

## GM Full-Size Pickups



Stellantis

## Ram Pickup

Vehicles-in-Operation

16.1M

18.1M

8.2M

Accessorization Rate

30%

30%

29%

Projected Sales

6.7M (2021-2028)

6.6M (2021-2028)

4.9M (2021-2028)

Redesign Schedule  
and Model Rumors

### F-150

MY 2021: Redesign; Hybrid Added

MY 2023: Battery Electric Added

MY 2027: Redesign

### F-Super Duty

MY 2024: Battery Electric Added

### Chevrolet Silverado/GMC Sierra LD

MY 2023: Exterior Refresh; Battery Electric Added

MY 2026 (Sierra LD): Redesign

MY 2027 (Silverado LD): Redesign

### Chevrolet Silverado/GMC Sierra HD

Mid-Cycle 2022: Exterior Refresh

MY 2024 (Sierra HD): Battery Electric Added

MY 2026 (Silverado HD): Redesign

MY 2027 (Sierra HD): Redesign

### Ram Pickup LD

MY 2025: Redesign; Battery Electric Added

2024/2025: Rumored end of prior-generation  
Ram DS lineup (i.e., Ram 1500 Classic)

# OTHER POPULAR AND EMERGING PICKUPS



Toyota

## Toyota Tacoma



GM

## GM Mid-Size Pickups



Jeep

## Jeep Gladiator

Vehicles-in-Operation

3.5M

2.6M

113K

Accessorization Rate

25%

20%

\*\*

Projected Sales

2.3M (2021-2028)

1.2M (2021-2028)

588K (2021-2028)

Redesign Schedule  
and Model Rumors

**Tacoma**  
MY 2024: Redesign; Hybrid Added

**Chevrolet Colorado**  
MY 2024: Redesign  
MY 2026: Exterior/Interior Refresh

**GMC Canyon**  
MY 2024: Redesign  
MY 2026: Exterior/Interior Refresh

**Gladiator**  
MY 2022: Plug-in Hybrid Added

\*\*Accessorization data limited on new Jeep Gladiator.

# ELECTRIC PICKUPS HAVE ARRIVED

Here are three upcoming electric pickups



Rivian



Tesla



GM

## Rivian R1T

## Tesla Cybertruck

## GMC Hummer Pickup EV

Price

Starting at \$67,500

Starting at \$39,900

Starting at \$79,995

EPA Range Estimates<sup>1</sup>

250-400+ mi

250-500+ mi

250-350+ mi

Projected Sales

44K (2021-2028)

145K (2022-2028)

63K (2021-2028)

Release Date

June 2021  
*Launch Edition*

2022

Fall 2021  
*Hummer EV Edition 1*

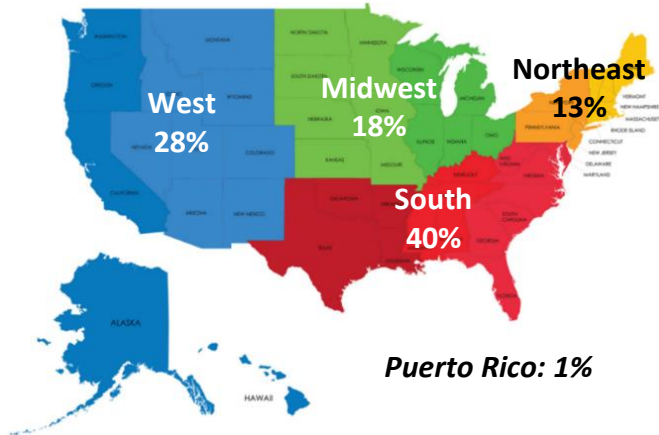
<sup>1</sup>Maximum EPA Range Estimates vary by specific model/trim (and also by driving conditions)



# SPORTS CARS



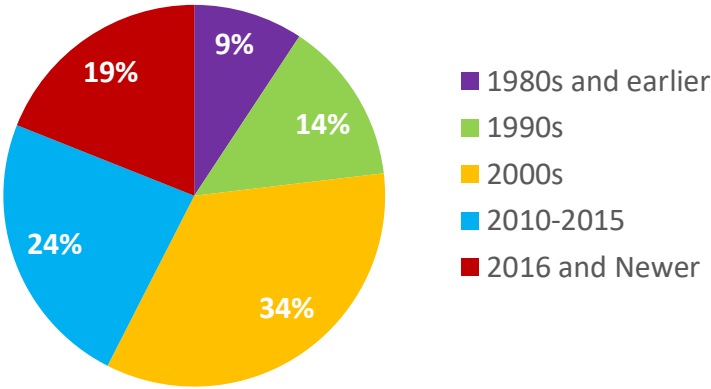
# SPORTS CARS IN THE UNITED STATES



**9.8 Million Registered in the United States**  
*3% of all vehicles on the road*

Top 5 States for Sports Cars	
California	1.5M
Texas	893K
Florida	771K
New York	358K
Georgia	345K

## Vehicle Age



Top Registered Sports Car Models	
Ford Mustang*	2.1M
Chevrolet Camaro*	1.3M
Chevrolet Corvette	824K
Dodge Challenger*	594K
MINI Cooper	516K
Mazda MX5 Miata	317K
Acura TSX	278K
Porsche 911	234K
Volkswagen GTI	241K
Mitsubishi Eclipse	201K

\*Some models include rebadged variants and other similar models. See index.

# SPORTS CAR PROFILE AND FUTURE SALES

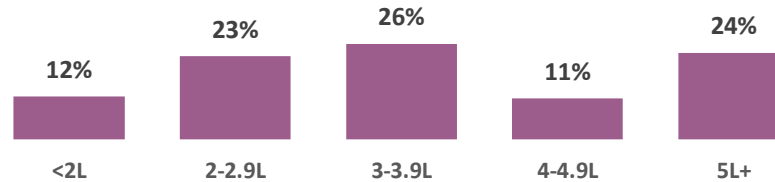
While new vehicle sales have shifted away from passenger cars, sports cars remain popular for our industry. While not as high volume as other segments, sports cars are sought after by auto enthusiasts who are more likely to accessorize.

The Mustang is the most popular, best-selling sports car in operation today. Other muscle cars, like the Camaro and Challenger, also do well. The Subaru WRX is a popular tuner car among enthusiasts and is also popularly accessorized.

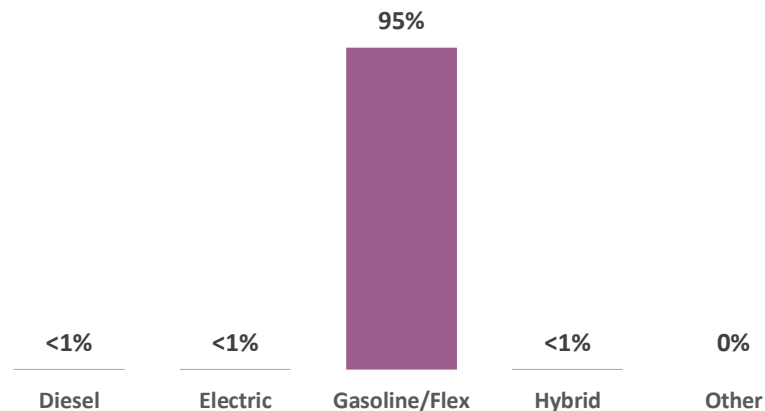
Is a new pony car coming? In 2024, it's anticipated that Dodge will release the Cuda, a resurrection of the classic Plymouth Barracuda. While details are still limited, it is a rumored potential successor to the Dodge Challenger. The Dodge Cuda is expected to sell well and be popular among enthusiasts as well.

While sports cars have traditionally been mostly gas powered, alternative energy platforms are coming. Most of the modern muscle cars have alternative powertrains planned for future model years. Ford has already released an electric Mustang CUV, but also plans a hybrid model of the traditional Mustang for the 2022 model year.

Engine Displacement Profile of Current Sports Cars



Powertrain Breakdown of Current Sports Cars

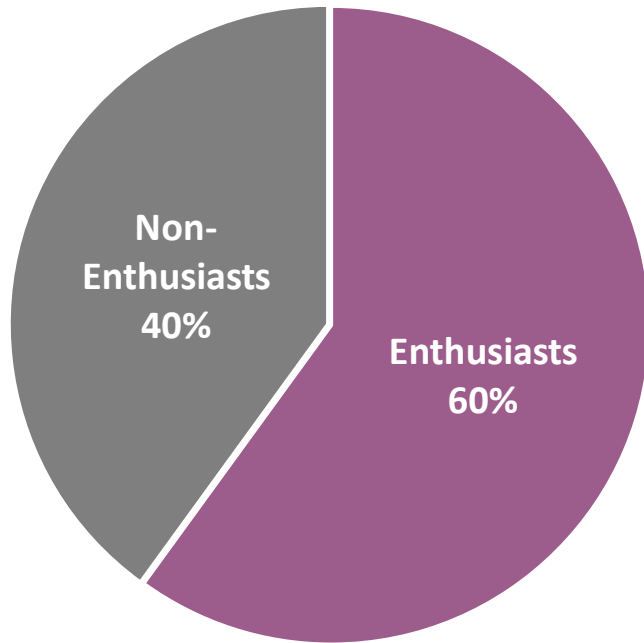


Top-Selling Projected Models 2021-2025

Ford Mustang	331K
Dodge Challenger	160K
Chevrolet Camaro	150K
Subaru WRX	147K
Dodge Cuda	122K
MINI Cooper	109K
MINI Countryman	53K
Toyota 86 / Subaru BRZ	49K
Mazda MX-5 Miata	42K
Porsche 911	28K



# SPORTS CAR ACCESSORIZATION PROFILE



Share of Sports Car Owner  
Accessorizers in 2019

**\$3.51 Billion**  
Overall Market Size

**8%**  
Share of Specialty-Equipment Retail  
Sales

## Top Products Categories Purchased (in 2019)

Performance/Special Purpose Tires

Fender, Hood and Body Upgrades

Maintenance Oils and Additives

Body Finishing Products

Brake Products

Wax and Cleaning Products

Head/Tail Lights

Floor Mats and Interior Appearance Products

Exterior Appearance Upgrades

Internal Engine Products

# WHAT ARE THE HOTTEST SPORTS CARS FOR OUR INDUSTRY?

Sports cars are some of the most accessorized and enthusiast-owned vehicles on the road today. While produced at much lower numbers than the typical passenger car, accessorizers modify sports cars at a much higher rate and install more complex parts and accessories on their vehicles.

The top sports cars for accessorization are the muscle cars: the Ford Mustang, the Chevrolet Camaro, the Dodge Challenger and Chevrolet Corvette. They have a rich history and are among the most popularly accessorized vehicles on the road today. SEMA forecasts that their popularity for the aftermarket will continue to remain strong and grow.

While the low sales volume of most other sports car models makes it difficult for us to quantify their impact, many other sporty vehicles, such as the Toyota Supra, have generated niche markets within our industry.

Hybrid and electric powertrains are becoming more popular and are coming to these muscle cars. A plug-in hybrid model of the traditional Mustang is expected for MY 2022. Plans are also in the works for hybrids and electrics for the other muscle cars. Time will tell if consumers accessorize these alternative energy vehicles as much as they do their traditional counterparts.

## SEMA Hot Sports Cars for Accessorization

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2025)
Ford Mustang*	2.1M	34%	331K
Chevrolet Camaro*	1.3M	38%	150K
Dodge Challenger*	594K	39%	160K
Chevrolet Corvette	824K	30%	11K

*\*Some models include rebadged variants and other similar models. See index.*

*For more information on the hottest vehicles for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.*

# THE MODERN AMERICAN MUSCLE CARS



Ford

**Ford Mustang\***



GM

**Chevrolet Camaro\***



Stellantis

**Dodge Challenger\***



GM

**Chevrolet Corvette**

**Vehicles-in-Operation**

2.1M

1.3M

594K

824K

**Accessorization Rate**

34%

38%

39%

30%

**Projected Sales**

331K (2021-2025)

150K (2021-2025)

160K (2021-2025)

11K (2021-2025)

**Redesign Schedule  
and Model Rumors**

**Mustang**

MY 2022: Hybrid Added

MY 2023: Redesign

Mustang Mach-E Electric CUV  
currently on sale

**Camaro**

MY 2029: Redesign; rumored shift to  
battery electric

**Challenger**

Rumored to be discontinued after 2024  
and replaced with the Dodge Barracuda

**Corvette**

MY 2022: Hybrid Added

Corvette CUV  
rumored in 2025

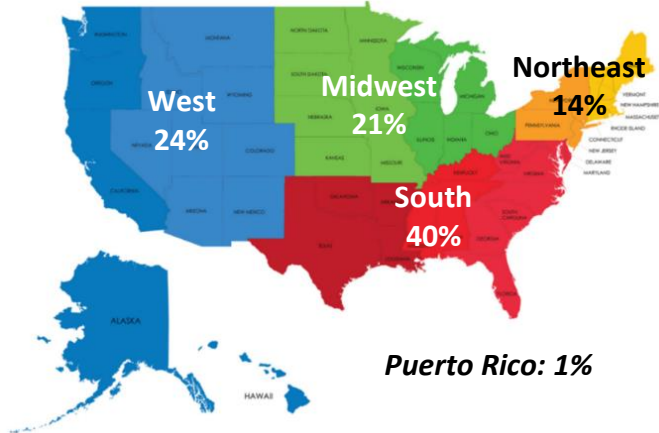
*\*Vehicles-in-operation counts and accessorization rates includes rebadged variants and similar models*



# SUVS



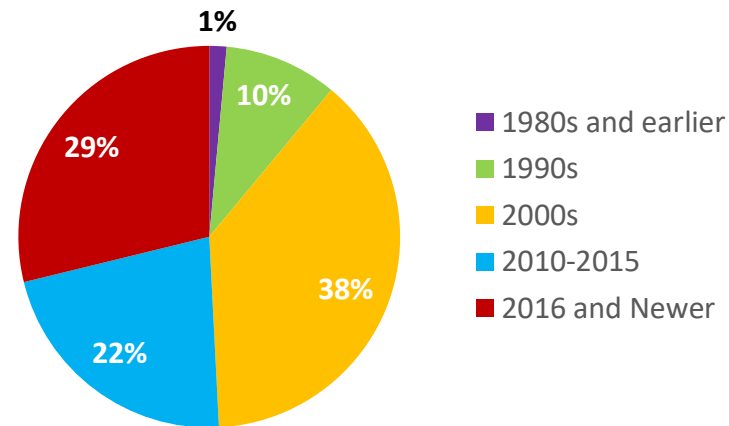
# SUVS IN THE UNITED STATES



**37.3 Million Registered in the United States**  
*13% of all vehicles on the road*

Top 5 States for SUVs	
California	3.9M
Texas	3.6M
Florida	2.1M
New York	1.5M
Pennsylvania	1.3M

## Vehicle Age



Top Registered SUV Models	
Chevrolet Tahoe/GMC Yukon	4.0M
Ford Explorer*	3.9M
Jeep Grand Cherokee	3.3M
Jeep Wrangler	3.2M
Toyota 4Runner	2.0M
Ford Expedition/Lincoln Navigator	1.8M
Jeep Cherokee	1.8M
Chevrolet/GMC Suburban	1.6M
Kia Sorento	1.2M
Dodge Durango/Chrysler Aspen	1.2M

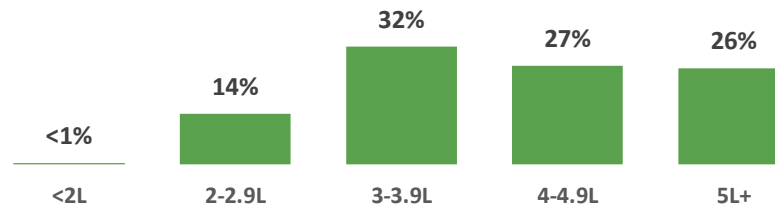
*\*Some models include rebadged variants and other similar models. See index.*

# SUV PROFILE AND FUTURE SALES

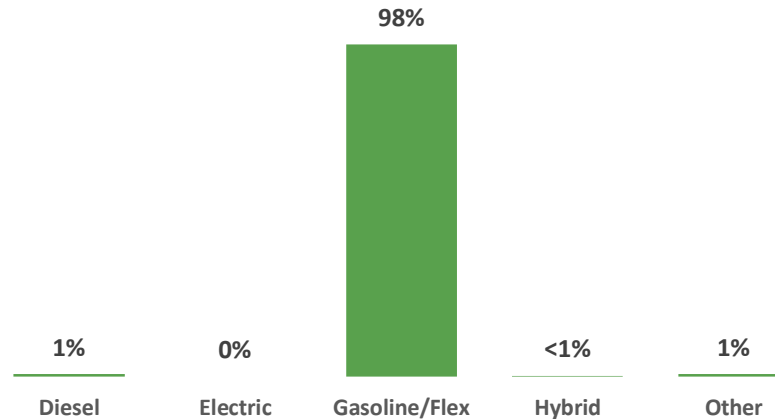
The growth of models across categories has blurred the distinction between a traditional SUV and a crossover (or CUV). While both are utility vehicles, crossovers are considered a separate segment as they are built with a unibody platform (commonly used for passenger cars), while SUVs are built on a truck (body-on-frame) platform. While CUVs are expected to continue to grow in popularity and take a bigger share of new vehicle sales, companies continue to support the SUV segment. SUV sales will largely remain the same or even grow slightly over the next decade.

The Jeep Wrangler, a mainstay hit within our industry, continues to be popular among new car buyers. The upcoming Ford Bronco is expected to do extremely well among consumers as well. Many of the SUV models projected to sell well over the next decade are also versatile off-roaders—which often attracts enthusiasts.

### Engine Displacement Profile of Current SUVs



### Powertrain Breakdown of Current SUVs

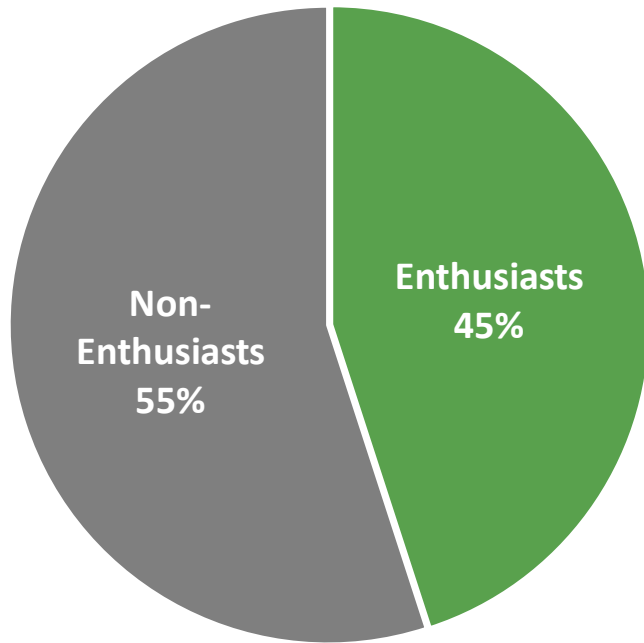


### Top-Selling Projected Models 2021-2028

Ford Explorer/Lincoln Aviator	2.4M
Jeep Grand Cherokee	1.8M
Ford Bronco/Bronco Sport	1.6M
Jeep Wrangler	1.6M
Chevrolet Tahoe/GMC Yukon	1.4M
Jeep Cherokee	1.3M
Toyota 4Runner	1.2M
Jeep Compass	1.1M
Kia Sorento	844K
Ford Expedition/Lincoln Navigator	835K



# SUV ACCESSORIZATION PROFILE



Share of SUV Owner Accessorizers in 2019

**\$6.35 Billion**  
Overall Market Size

**14%**  
Share of Specialty-Equipment Retail Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Brake Products

Head/Tail Lights

Body Finishing Products

Wax and Cleaning Products

Exterior Appearance Upgrades

Navigation and Driver Assist Systems

Batteries and Related Products

Fender, Hood, and Body Upgrades

Suspension Products

# WHAT ARE THE HOTTEST SUVs FOR OUR INDUSTRY?

## SEMA Hot SUVs for Accessorization

SUVs are an important part of the specialty-equipment industry. While not as high volume as pickups, SUV enthusiasts often upgrade their vehicles with lifestyle in mind (such as for off-roading or camping) and represent a large share of specialty-equipment industry sales each year.

The Jeep Wrangler is one of the most widely modified vehicles on the road today. Nearly 40% are upgraded or accessorized during a year. Many SUVs, including the Wrangler and 4Runner, are commonly used off-road and utilize aftermarket products to facilitate that.

Accessorizing other SUV models may focus on the lifestyle and utility advantages their platforms offer.

*For more information on the hottest vehicles for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.*

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2028)
Jeep Wrangler	3.2M	39%	1.6M
Chevrolet Tahoe/GMC Yukon	4.0M	28%	1.4M
Toyota 4Runner	2.0M	33%	1.2M
Jeep Grand Cherokee	3.3M	22%	1.8M
Ford Explorer*	3.9M	19%	2.4M
Cadillac Escalade	625K	32%	354K
Jeep Cherokee	1.8M	20%	1.3M
Chevrolet/GMC Suburban	1.6M	24%	437K
Dodge Durango/Chrysler Aspen	1.2M	23%	215K
Ford Expedition/Lincoln Navigator	1.8M	23%	835K

*\*Some models include rebadged variants and other similar models. See index.*

# POPULAR SUV MODELS



Jeep

## Jeep Wrangler



GM

## Chevrolet Tahoe / GMC Yukon



4Runner

## Toyota 4Runner

Vehicles-in-Operation

3.2M

4.0M

2.0M

Accessorization Rate

39%

28%

33%

Projected Sales

1.6M (2021-2028)

1.4M (2021-2028)

1.2M (2021-2028)

Redesign Schedule  
and Model Rumors

### Wrangler

MY 2021: Plug-in Hybrid Model Added  
(Jeep 4xE)

MY 2029: Redesign

### Chevrolet Tahoe

MY 2023: Hybrid Model Added  
MY 2029: Redesign

### GMC Yukon

MY 2023: Hybrid Model Added  
MY 2029: Redesign

### GMC Yukon XL

MY 2023: Hybrid Model Added  
MY 2029: Redesign

### 4Runner

MY 2024: Hybrid Model Added

Source: 2019 SEMA US Market Data

Source: SEMA Member VIO Program / ©2021 Experian, Data as of December 31, 2020.

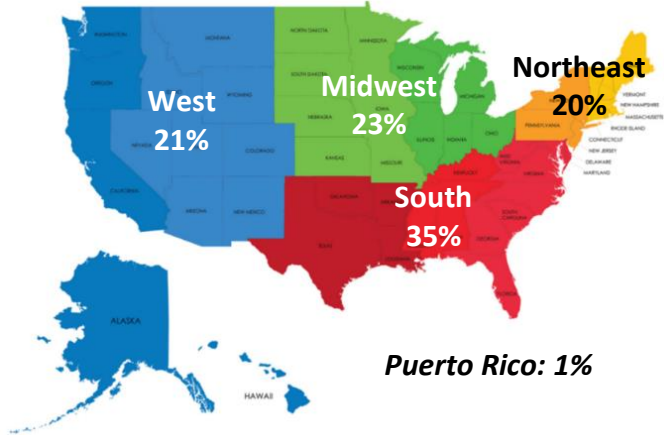
Source: ©2021 Wards Intelligence, a division of Informa. Data as of March 2021.



# CUVS



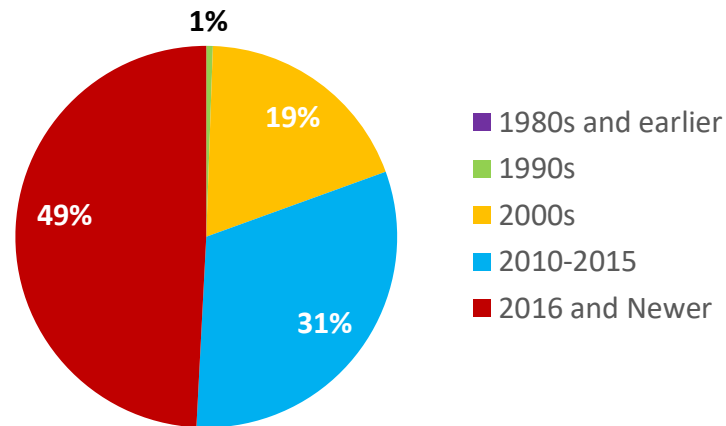
# CUVS IN THE UNITED STATES



**54.6 Million Registered in the United States**  
*19% of all vehicles on the road*

Top 5 States for CUVs	
California	5.4M
Texas	4.2M
Florida	3.6M
New York	3.2M
Pennsylvania	2.5M

## Vehicle Age



Top Registered CUV Models	
Honda CR-V	4.7M
Toyota RAV4	4.0M
Ford Escape*	4.0M
Chevrolet Traverse*	3.1M
Chevrolet Equinox	3.0M
Nissan Rogue	2.7M
Toyota Highlander	2.5M
Honda Pilot	2.0M
Subaru Forester	1.9M
Ford Edge	1.6M

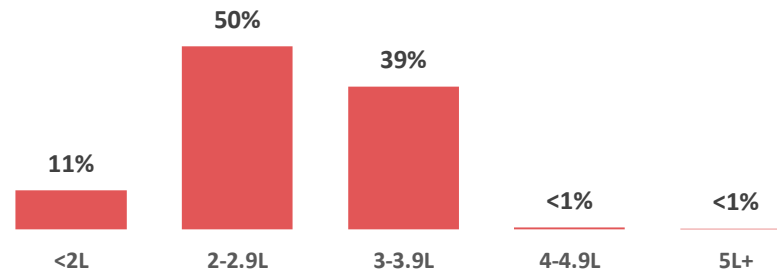
*\*Some models include rebadged variants and other similar models. See index.*

# CUV PROFILE AND FUTURE SALES

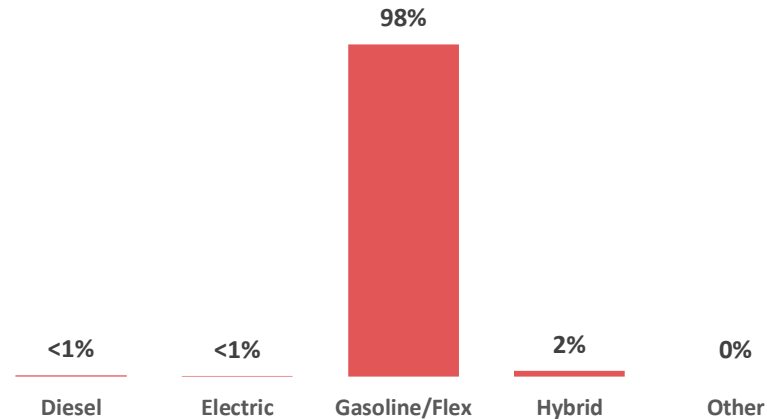
The desire for the efficiency of a passenger car with the functionality of a light truck has contributed to the increased popularity of CUVs among consumers. Projected to make up nearly 50% of all new vehicles sold by 2028, CUVs are the fastest-growing segment.

Most, if not all, automakers offer a CUV in their lineup for consumers. Consequently, when looking at the models expected to sell best over the next decade, there are no clear winners. While the Honda CR-V and Toyota RAV4 have historically done well and are expected to sell the most over the next seven years, competitors are not far behind. This makes it difficult to distinguish a clear market winner or dominant platform to develop aftermarket products for.

### Engine Displacement Profile of Current CUVs



### Powertrain Breakdown of Current CUVs



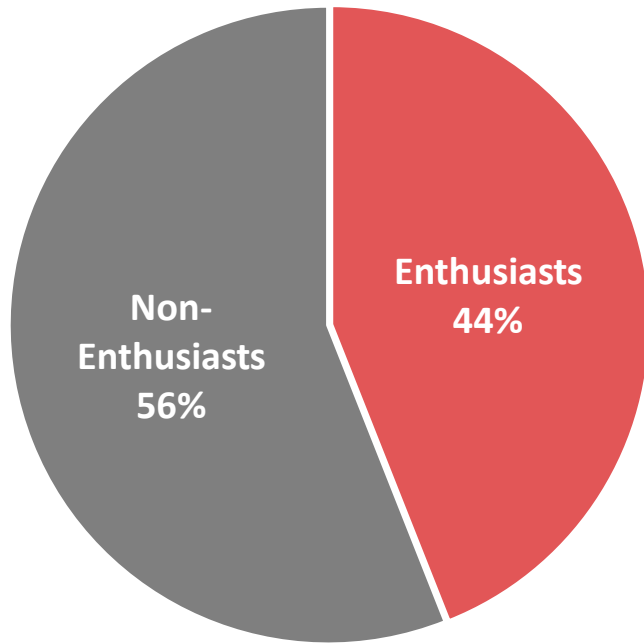
### Top-Selling Projected Models 2021-2028

Honda CR-V	3.2M
Toyota RAV4	3.1M
Nissan Rogue	2.9M
Chevrolet Equinox	2.5M
Chevrolet Traverse*	2.2M
Toyota Highlander	2.1M
Ford Escape	1.5M
Subaru Forester	1.5M
Subaru Crosstrek	1.2M
Mazda CX-5	1.1M

\*Some models include rebadged variants and other similar models. See index.



# CUV ACCESSORIZATION PROFILE



Share of CUV Owner Accessorizers in 2019

**\$5.90 Billion**  
Overall Market Size

**13%**  
Share of Specialty-Equipment Retail Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Navigation and Driver Assist Systems

Floor Mats and Interior Appearance Products

Wax and Cleaning Products

Body Finishing Products

Head/Tail Lights

Brake Products

Racks and Carriers

Fender, Hood and Body Upgrades

Exterior Appearance Upgrades

# WHAT ARE THE HOTTEST CUVS FOR OUR INDUSTRY?

Despite their popularity, CUVs remain a challenging segment for our market. There are currently over 130 models on the road, and more than 170 models projected to be sold from 2021-2028. Unlike pickups, where its clear which models are key, CUVs are extremely diverse and varied. This diversity makes it extremely challenging for our industry to find the platforms that will offer a solid return for developing new products.

Additionally, given their appeal to a broad audience, these vehicles are not as often accessorized and tend to be less enthusiast focused. Nevertheless, given their growing presence on the road, CUVs are an opportunity that our industry needs to identify a viable business path for.

**130+** CUV Models Currently on the Road

**More Than 170** CUV Models Projected to be sold from 2021-2028

## SEMA Hot CUVs for Accessorization

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2028)
BMW X5	620K	43%	409K
BMW X3	519K	29%	519K
Acura MDX	905K	33%	481K
Audi Q5/SQ5	487K	39%	524K
Toyota RAV4	4.0M	16%	3.1M
Ford Escape*	4.0M	15%	1.5M
Lexus RX	1.5M	17%	836K
Chevrolet Traverse*	3.1M	18%	2.2M

*\*Some models include rebadged variants and other similar models. See index.*

For more information on the hottest vehicles for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.

# POPULAR CUV MODELS



BMW

**BMW X5**



Toyota

**Toyota RAV4**



Ford

**Ford Escape\***

**Vehicles-in-Operation**

620K

4.0M

4.0M\*

**Accessorization Rate**

43%

16%

15%\*

**Projected Sales**

409K (2021-2028)

3.1M (2021-2028)

1.5M (2021-2028)

**Redesign Schedule  
and Model Rumors**

**BMW X5**

MY 2023: Fuel Cell Model Added

MY 2027: Redesign

**Rav4**

MY 2026: Redesign

**Ford Escape**

MY 2022: Plug-in Hybrid Model Added

MY 2025: Redesign

MY 2028: Battery Electric Added

*\*Vehicles-in-operation counts and accessorization rates includes rebadged variants and similar models*

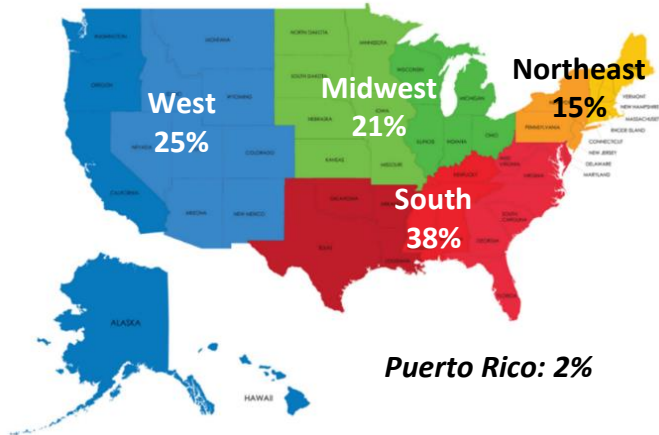


# TRADITIONAL CARS

Small, Mid Range and Large Vehicle Segments



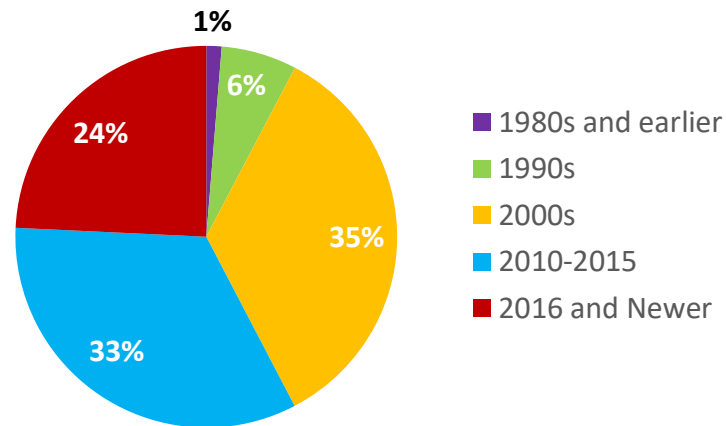
# TRADITIONAL CARS IN THE UNITED STATES



**86.1 Million Registered in the United States**  
*31% of all vehicles on the road*

Top 5 States for Traditional Cars	
California	11.7M
Texas	6.7M
Florida	5.5M
Ohio	3.5M
New York	3.3M

## Vehicle Age



Top Registered Traditional Car Models	
Toyota Camry	6.9M
Honda Accord	6.4M
Honda Civic*	5.8M
Toyota Corolla*	5.2M
Nissan Altima	3.8M
Ford Fusion	2.7M
Chevrolet Malibu	2.7M
Ford Focus	2.4M
Chevrolet Impala	2.3M
Hyundai Elantra	2.3M

\*Some models include rebadged variants and other similar models. See index.

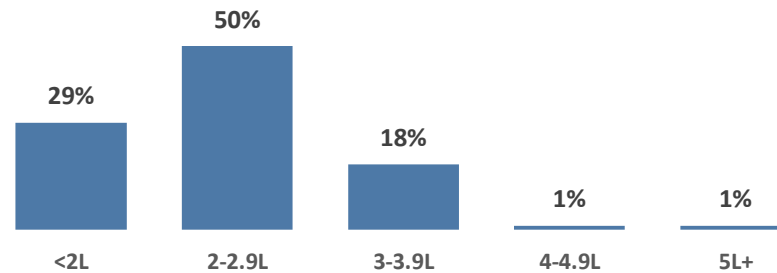
# TRADITIONAL CAR PROFILE AND FUTURE SALES

While new vehicles are shifting toward light trucks and many automakers are eliminating their sedan offerings, traditional cars remain one of the largest segments on the road. Currently, there are over 86 million traditional cars in operation and, when the small, mid range and large segments are combined, represent the most common vehicle type on the road today. It will take a long time for these coupes and sedans to cycle out of operation.

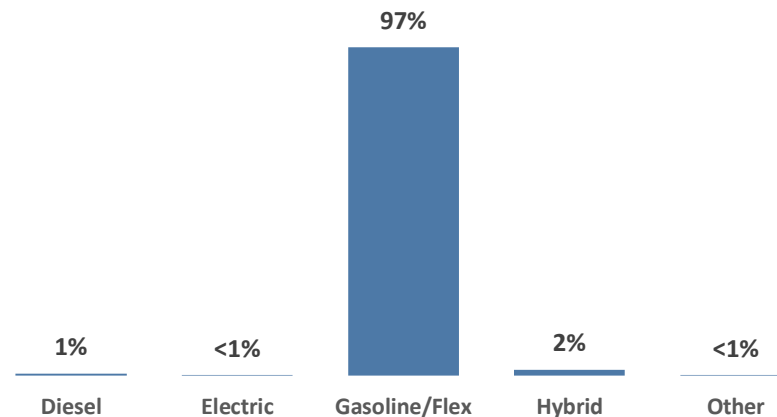
The best-selling traditional cars are the Toyota Camry, Honda Civic and Toyota Corolla. These three models remain extremely popular.

The Subaru Outback is an example of a traditional car that is shifting into the CUV space. Recently, Subaru announced that it was developing a wilderness package for the Outback to try and attract more enthusiasts and off-roaders.

Engine Displacement Profile of Current Traditional Cars



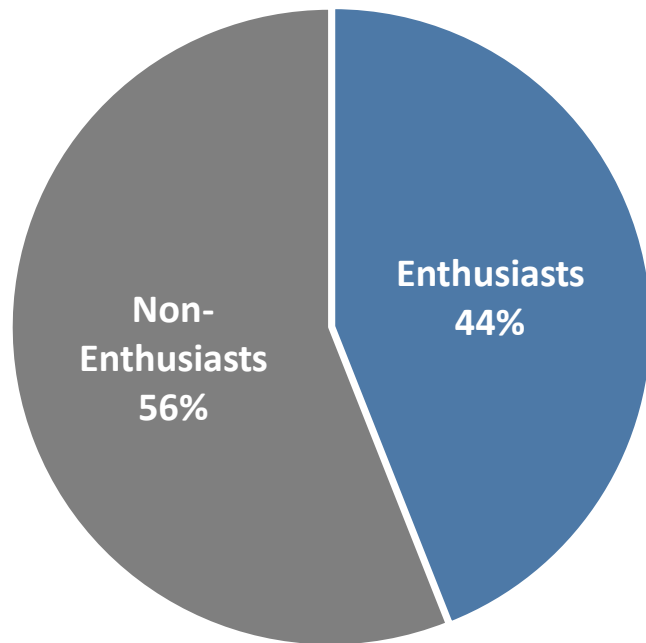
Powertrain Breakdown of Current Traditional Cars



Top-Selling Projected Models 2021-2028

Toyota Camry	2.5M
Honda Civic	2.4M
Toyota Corolla	1.9M
Honda Accord	1.6M
Subaru Outback	1.5M
Hyundai Elantra	1.0M
Nissan Altima	969K
Nissan Sentra	755K
Dodge Charger	702K
Hyundai Sonata	665K

# SMALL CAR ACCESSORIZATION PROFILE



Share of Small Car Owner  
Accessorizers in 2019

**\$2.53 Billion**  
Overall Market Size

**5%**  
Share of Specialty-Equipment Retail  
Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Wax and Cleaning Products

Brake Products

Batteries and Related Products

Body Finishing Products

Navigation and Driver Assist Systems

Ignition Products

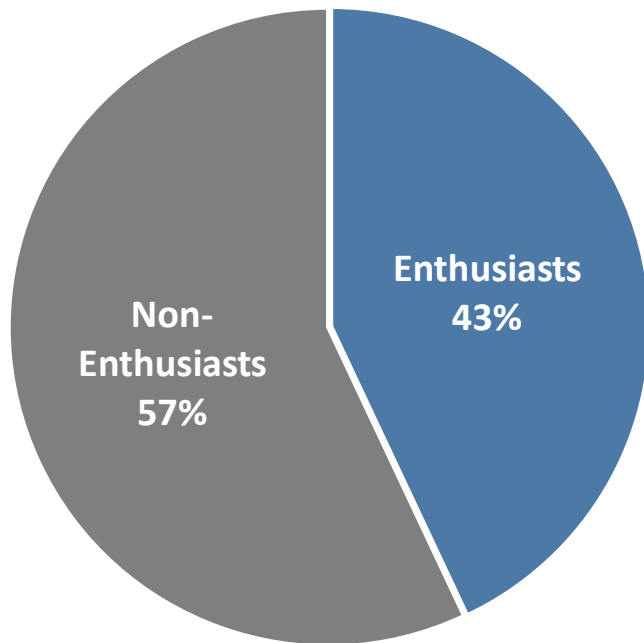
Head/Tail Lights

Suspension Products

Fender, Hood and Body Upgrades



# MID RANGE/LARGE CAR ACCESSORIZATION PROFILE



Share of Mid Range / Large Car Owner Accessorizers in 2019

**\$7.10 Billion**  
Overall Market Size

**15%**  
Share of Specialty-Equipment Retail Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Wax and Cleaning Products

Brake Products

Body Finishing Products

Floor Mats and Interior Appearance Products

Head/Tail Lights

Navigation and Driver Assist Systems

Batteries and Related Products

Fender, Hood and Body Upgrades

Ignition Products

# WHICH TRADITIONAL CARS ARE HOT FOR OUR INDUSTRY?

Despite their large presence on the road today, traditional cars are not as extensively accessorized as some other segments. As styles have changed and models have grown, these cars have sometimes become less enthusiast friendly and geared towards the broader market. However, they still tend to be popular among young accessorizers, as they typically are cheaper to buy than larger vehicles like CUVs.

The Honda Civic is commonly accessorized, but other models are not far behind. The Civic was historically a popular tuner car but its size has since grown to attract more buyers. This has pushed it from a subcompact to mid range vehicle, making newer models more expensive and less appealing to accessorizers. Other models, like the Dodge Charger, are extremely popular with our industry. Chargers attract a lot of interest from enthusiasts and have a rich history as a pony car. Most traditional cars, however, only attract more general aftermarket accessories and have little enthusiast appeal.

For more information on the hottest vehicles for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.

## SEMA Hot Traditional Cars for Accessorization

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2028)
<b>Honda Civic*</b>	5.8M	21%	2.4M
<b>Toyota Corolla*</b>	5.2M	17%	1.9M
<b>Toyota Camry</b>	6.9M	18%	2.5M
<b>Honda Accord</b>	6.4M	19%	1.6M
<b>Dodge Charger</b>	1.1M	40%	702K
<b>Subaru Impreza*</b>	946K	25%	406K
<b>Nissan Maxima*</b>	1.1M	20%	10K
<b>Nissan Altima</b>	3.8M	20%	969K
<b>Ford Focus</b>	2.4M	19%	<b>Discontinued</b>
<b>Volkswagen Jetta*</b>	1.8M	19%	632K

\*Some models include rebadged variants and other similar models. See index.

# POPULAR TRADITIONAL CARS



**Honda Civic**

**Dodge Charger**

**Subaru Impreza**

**Vehicles-in-Operation**

5.8M\*

1.1M

946K\*

**Accessorization Rate**

21%\*

40%

25%\*

**Projected Sales**

2.4M (2021-2028)

702K (2021-2028)

406K (2021-2028)

**Redesign Schedule  
and Model Rumors**

**Civic**  
MY 2022: Redesign  
MY 2025: Interior/Exterior Refresh

**Charger**  
MY 2023: Redesign

**Impreza**  
MY 2022: Redesign  
MY 2029: Redesign

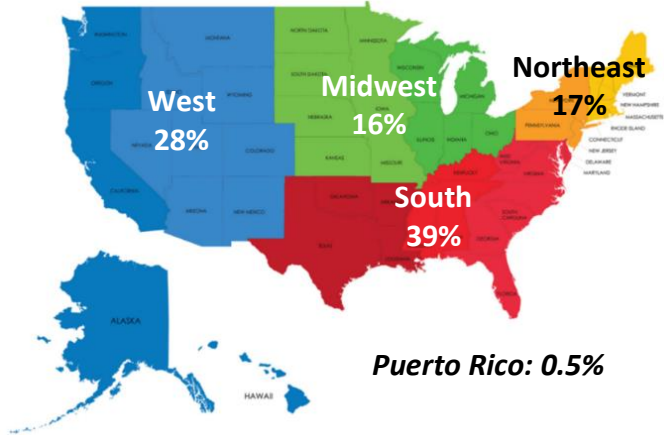
*\*Vehicles-in-operation counts and accessorization rates includes rebadged variants and similar models*

# UPSCALE CARS





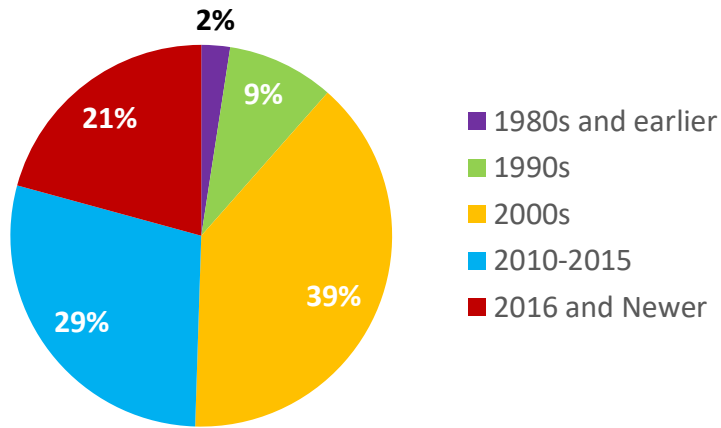
# UPSCALE CARS IN THE UNITED STATES



**15.4 Million Registered in the United States**  
*5% of all vehicles on the road*

Top 5 States for Upscale Cars	
California	2.8M
Florida	1.3M
Texas	1.3M
New York	740K
Georgia	610K

## Vehicle Age



Top Registered Upscale Car Models	
BMW 3 Series	1.7M
Lexus ES	1.0M
Mercedes-Benz C Class	1.0M
Mercedes-Benz E Class	922K
BMW 5 Series	799K
Acura TL/TLX	778K
Audi A4*	576K
Lexus IS	534K
Lincoln Town Car/Continental	529K
Cadillac CTS	512K

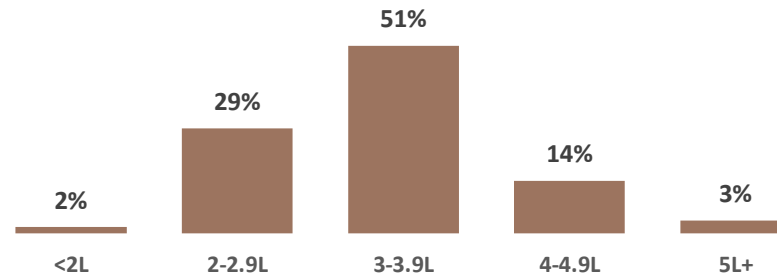
*\*Some models include rebadged variants and other similar models. See index.*

# UPSCALE CAR PROFILE AND FUTURE SALES

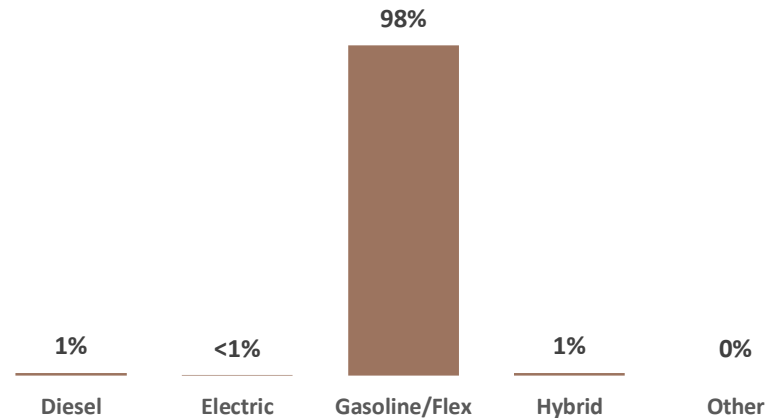
Upscale cars tend to be more expensive than the typical passenger car, which makes them lower volume than other vehicles. There are currently just over 15 million on the road today—just about 5% of the U.S. vehicle population. Most tend to be gasoline powered, but that is shifting as automakers push out more upscale cars with alternative energy platforms.

The Lexus ES is expected to sell well in the future, but the most popular upscale models will continue to be BMWs, as they cater to both luxury and sports car buyers, especially among younger audiences.

Engine Displacement Profile of Current Upscale Cars



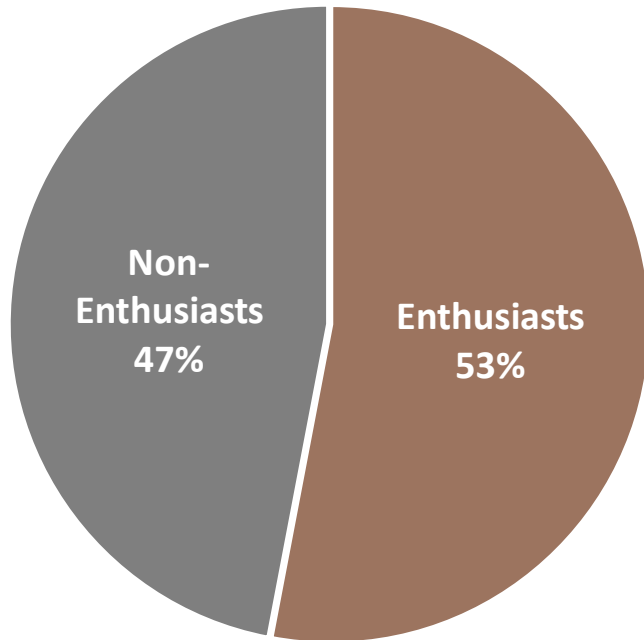
Powertrain Breakdown of Current Upscale Cars



Top-Selling Projected Models 2021-2028

Lexus ES	297K
BMW 3 Series	280K
Mercedes C Class	264K
BMW 5 Series	233K
BMW 4 Series	194K
Acura TLX	193K
Mercedes E Class	182K
Audi A4	177K
Audi A5	154K
Infiniti Q50	147K

# UPSCALE CAR ACCESSORIZATIONS PROFILE



Share of Upscale Car Owner Accessorizers in 2019

**\$3.48 Billion**  
Overall Market Size

**8%**  
Share of Specialty-Equipment Retail Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Brake Products

Body Finishing Products

Wax and Cleaning Products

Head/Tail Lights

Fender, Hood and Body Upgrades

Navigation and Driver Assist Systems

Floor Mats and Interior Appearance Products

Exterior Appearance Upgrades

Performance/Special Purpose Tires

# WHAT UPSCALE VEHICLES ARE HOT FOR OUR INDUSTRY?

Like sports cars, upscale cars are a low-volume but impactful segment for our industry. Upscale cars accounted for around 8% of all specialty-equipment U.S. retail sales in 2019, or roughly \$3.48 billion. Upscale cars are a highly enthusiast-focused segment, and accessorizers tend to install more aftermarket parts on them than the average vehicle. The enthusiasts who traditionally owned “tuner” cars may have grown to the upscale segment. Many of these vehicles are especially popular among young accessorizers as well.

European upscale cars are particularly hot for our industry, notably the BMW 3 Series, BMW 5 Series and Audi A4. Exterior appearance and body products are especially common among these vehicles.

## SEMA Hot Upscale Cars for Accessorization Rankings

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021-2028)
BMW 3 Series	1.7M	37%	280K
Audi A4*	576K	40%	177K
Mercedes-Benz C Class	1.0M	20%	264K
BMW 5 Series	799K	35%	233K
Lexus ES	1.0M	16%	297K

*For more information on the hottest vehicles for the specialty-equipment industry, download the SEMA Accessory Opportunity Report: Hot Cars and Trucks.*



# POPULAR UPSCALE CARS



BMW

**BMW 3 Series**



Audi

**Audi A4**



Mercedes-Benz

**Mercedes-Benz C Class**

**Vehicles-in-Operation**

1.7M

576K\*

1.0M

**Accessorization Rate**

37%

40%\*

20%

**Projected Sales**

280K (2021-2028)

177K (2021-2028)

264K (2021-2028)

**Redesign Schedule  
and Model Rumors**

**3 Series**

MY 2026: Redesign

**A4**

MY 2026: Redesign

**C Class**

MY 2022: Redesign

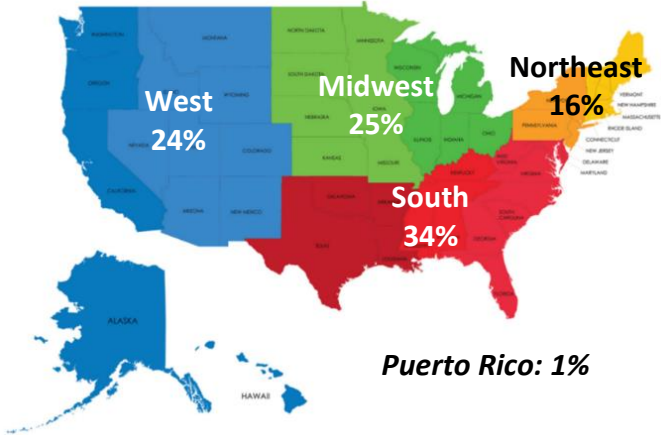
*\*Vehicles-in-operation counts and accessorization rates includes rebadged variants and similar models*



VANS



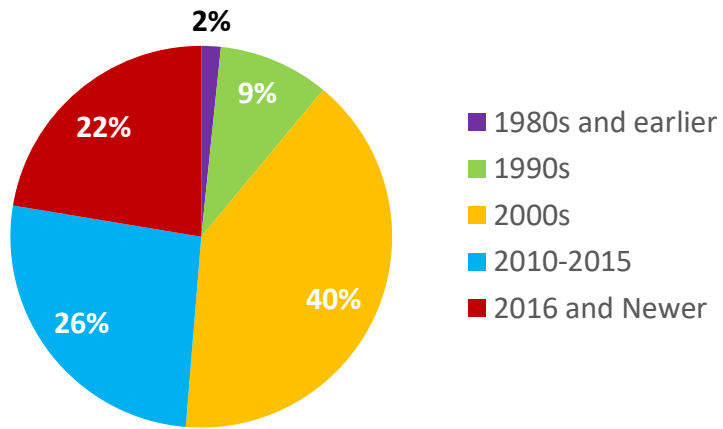
# VANS IN THE UNITED STATES



**16.7 Million Registered in the United States**  
*6% of all vehicles on the road*

Top 5 States for Vans	
California	2.0M
Texas	1.0M
Florida	1.0M
New York	801K
Illinois	769K

## Vehicle Age



Top Registered Van Models	
Honda Odyssey	2.3M
Dodge Caravan/Grand Caravan	2.3M
Toyota Sienna	2.0M
Chrysler/Plymouth Town & Country	1.4M
Ford E350	928K
Chevrolet Express 3500	549K
Chevrolet Express 2500	538K
Ford E250	472K
Ford E150	395K
Kia Sedona	387K

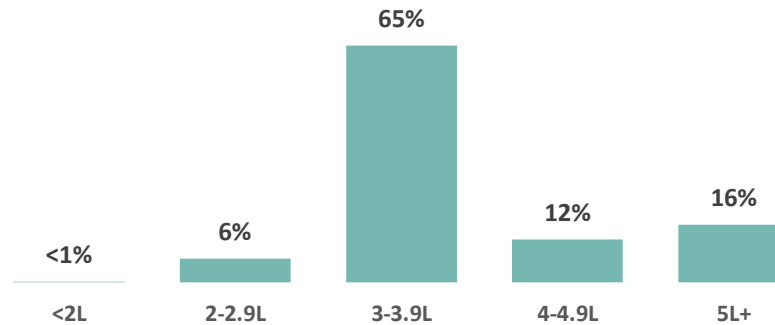


# VAN PROFILE AND FUTURE SALES

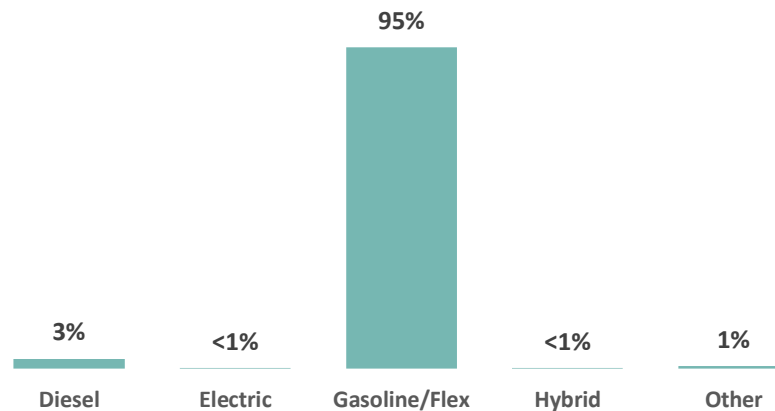
Compared to other segments, vans are neither popular on the road nor highly accessorized. The most common vans are minivans and are primarily functional and family-oriented. While some are accessorized, most consumers who buy parts for vans are not enthusiasts. The most popular van on the road today is the Honda Odyssey, which is expected to sell nearly 700,000 vehicles over the next seven years. The projected top-selling model is the Ford Transit, which is primarily used in business settings.

Most vans are gasoline powered, but electric vans are in development. There is also significant investment in autonomous technology for vans, to facilitate business operations.

Engine Displacement Profile of Current Vans



Powertrain Breakdown of Current Vans

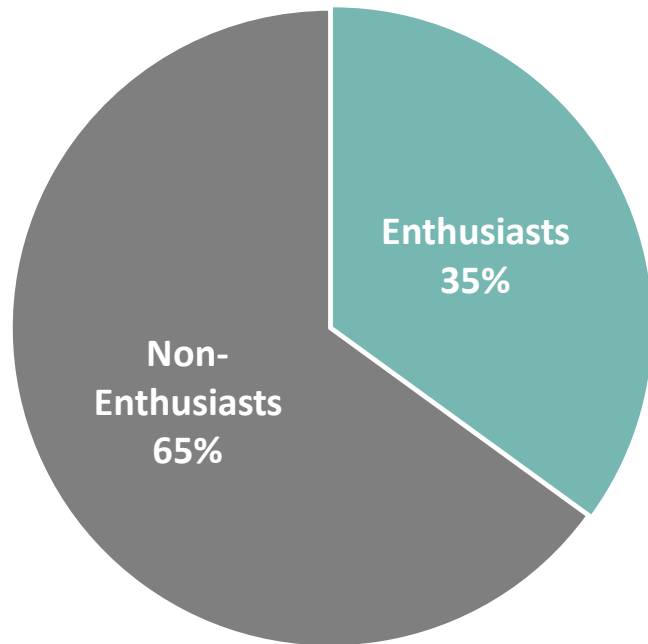


Top-Selling Projected Models 2021-2028

Ford Transit	1.2M
Honda Odyssey	695K
Chevrolet Express	558K
Toyota Sienna	557K
Ram Promaster	467K
Chrysler Voyager	369K
Mercedes Sprinter Van	329K
Ford Econoline	268K
Ford City Van	247K
GMC Savana	175K



# VAN ACCESSORIZING PROFILE



Share of Van Owner Accessorizers in 2019

**\$1.73 Billion**  
Overall Market Size

**4%**  
Share of Specialty-Equipment Retail Sales

## Top Products Categories Purchased (in 2019)

Maintenance Oils and Additives

Wax and Cleaning Products

Brake Products

Body Finishing Products

Floor Mats and Interior Appearance Products

Navigation and Driver Assist Systems

Head/Tail Lights

Exterior Appearance Upgrades

Batteries and Related Products

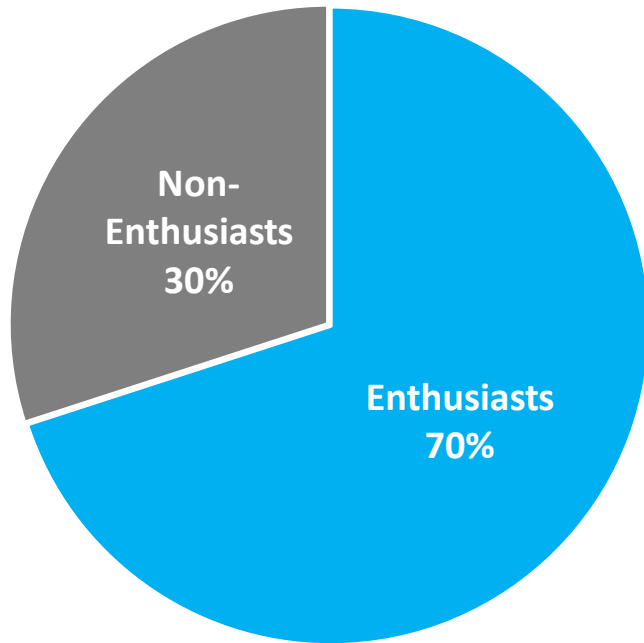
Fender, Hood and Body Upgrades

# CLASSICS

SEMA Defines Classics as Cars and Trucks Model Year 1973 and Earlier



# CLASSIC CARS ACCESSORIZATION PROFILE



Share of Classic Owner Accessorizers in 2019

**\$0.89 Billion**  
Overall Market Size

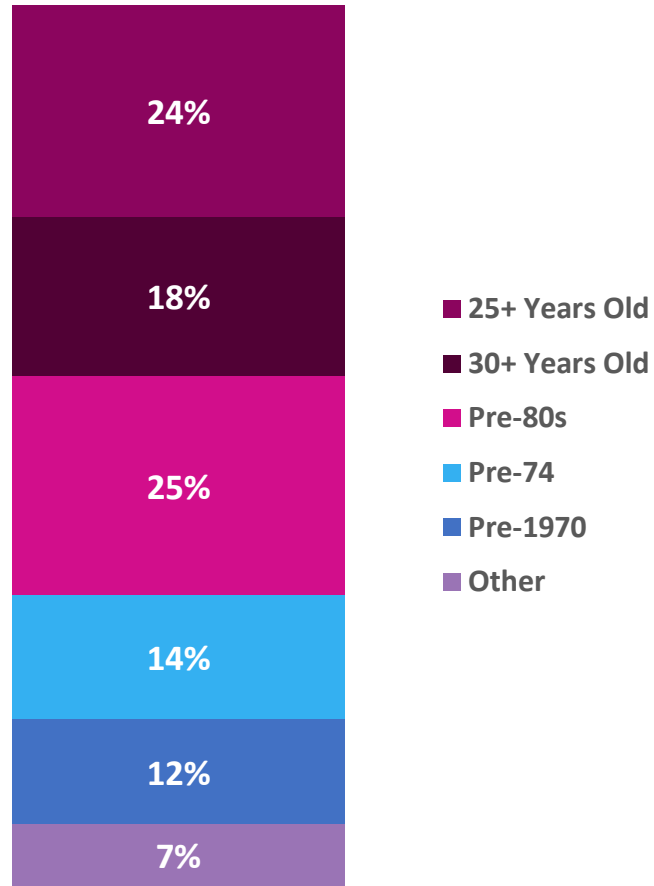
**2%**  
Share of Specialty-Equipment Retail Sales

While low volume, classic cars (model year 1973 and earlier) have significant interest from enthusiasts in our industry. Nearly three-quarters of all accessorizers who work on their classic are enthusiasts. Whether for full restoration or for a restomod upgrade, accessorizers of classic vehicles tend to spend significant time and investment on their vehicle—and often install highly enthusiast parts and accessories as part of their projects.

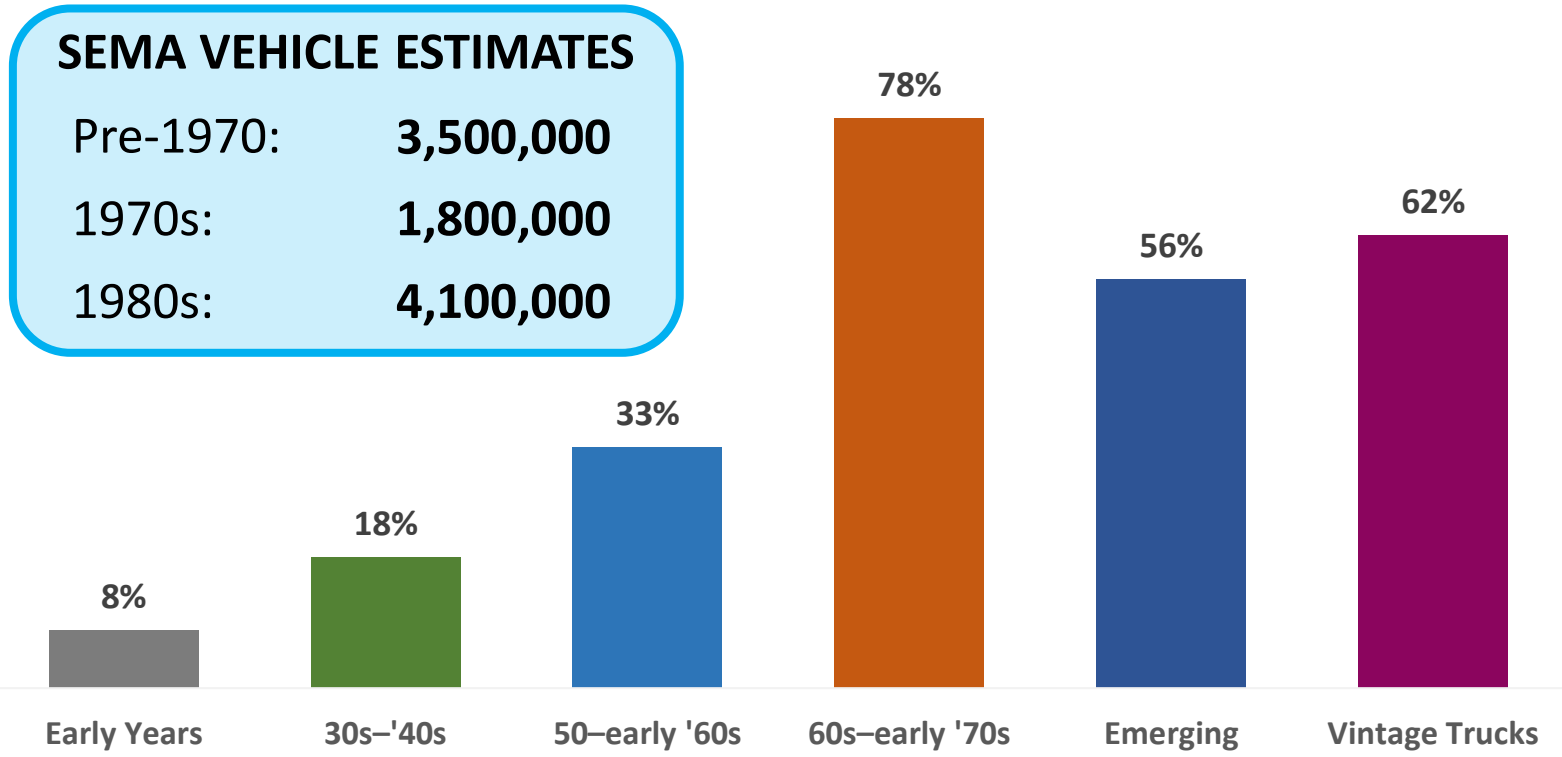
Top Products Categories Purchased (in 2019)
Carburetor and Fuel System Products
Maintenance Oils and Additives
Wax and Cleaning Products
Brake Products
Ignition Products
Suspension Products
Exhaust Products
Internal Engine Products
Dash System and Gauges
Performance/Special Purpose Tires

# SEMA CONSIDERS PRE-1974 VEHICLES AS CLASSICS, BUT THE DEFINITION VARIES AMONG THE INDUSTRY

What Businesses Say Makes a Vehicle Classic



Top Classic Vehicle Segments for the Industry  
Top 3 as Chosen by Industry Businesses



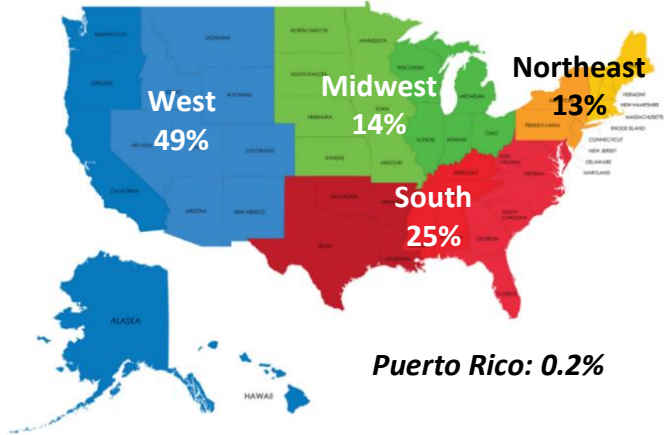
For more information on classics and our industry's opportunity with them, download the new SEMA Classic Cars, Modern Markets report.



# ALTERNATIVE POWER AND THE FUTURE OF ELECTRICS



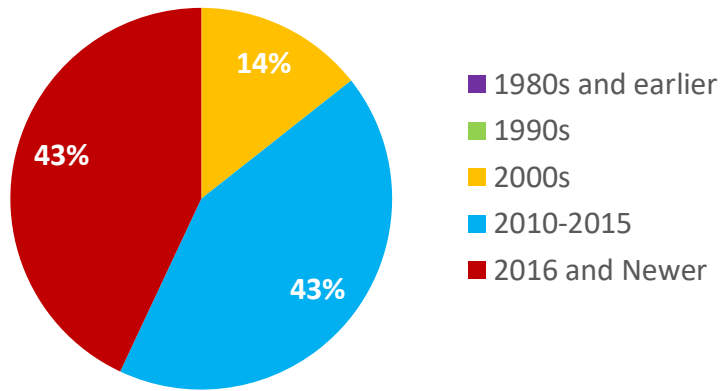
# ALTERNATIVE POWER CARS IN THE UNITED STATES



**4.0 Million Registered in the United States**  
*1% of all vehicles on the road*

Top 5 States for Alternative Power	
California	1.4M
Florida	212K
Texas	201K
Washington	177K
New York	142K

## Vehicle Age



Top Registered Alternative Power Models	
Toyota Prius*	2.0M
Tesla Model 3	360K
Lexus RX EV	186K
Tesla Model S	164K
Chevrolet Volt	143K
Ford C-Max	125K
Honda Insight	118K
Nissan Leaf	113K
Kia Niro	93K
Tesla Model X	90K

\*Some models include rebadged variants and other similar models. See index.



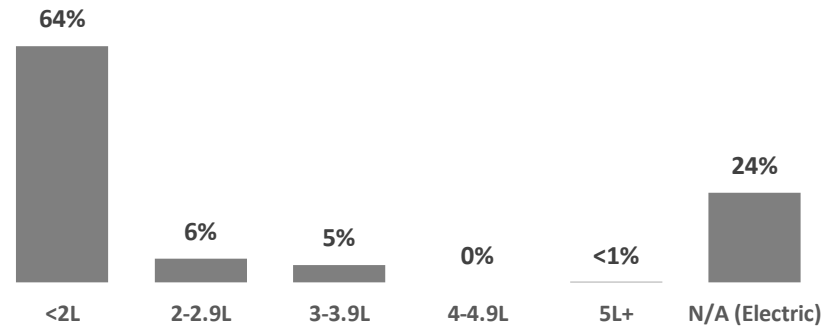
# ALTERNATIVE POWER PROFILE AND FUTURE SALES

Hybrids currently make up the bulk of the alternative energy segment. However, electrics are growing in popularity and numbers. While still low volume, most of the growth of electrics is tied to Tesla. Tesla dominates sales and is expected to continue to do so over the next decade—driven by the Model Y and the Model 3.

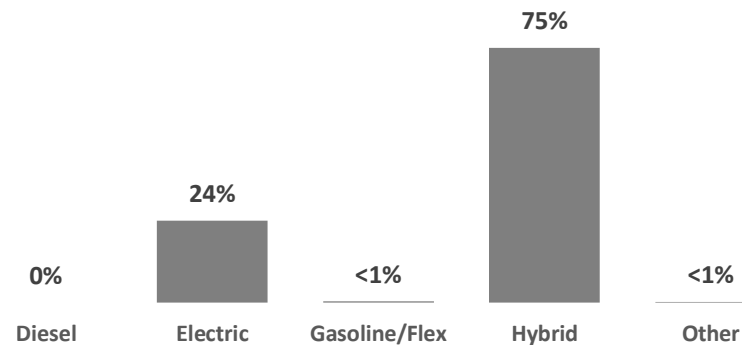
Many automakers are adding alternative energy powertrains to their most popular models. Full-size pickups, like the Ford F-150, already have hybrid models. The new electric Mustang Mach-E is expected to do well, with sales forecasted to reach over 330,000 by 2028.

The technology and electrical systems that power alternative energy vehicles make this a challenging segment for our industry, particularly for under-the-hood, performance-type upgrades. These vehicles tend to not be accessorized as highly as other segments and their volume remains low. As these vehicles become more popular, it will be important for the specialty-equipment industry to better understand how aftermarket products can interact with these vehicles.

**Engine Displacement Profile of Current Alternative Power Vehicles**



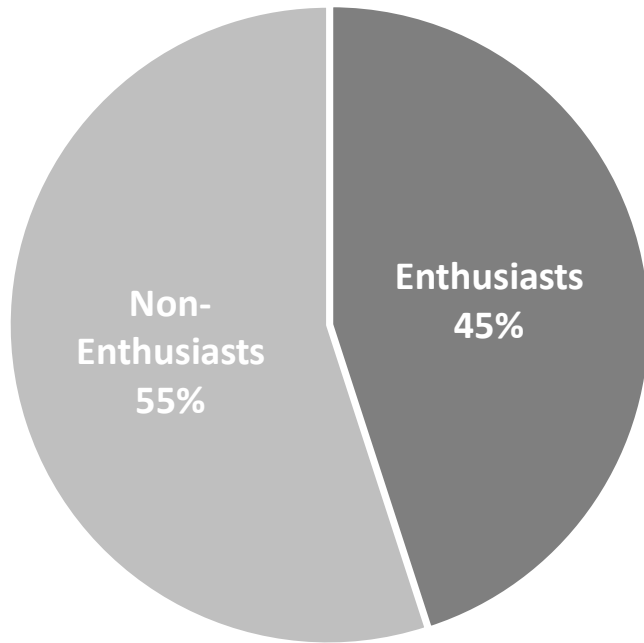
**Powertrain Breakdown of Current Alternative Power Vehicles**



**Top-Selling Projected Models 2021-2028**

Tesla Model Y	826K
Tesla Model 3	631K
Toyota Prius	372K
Ford Mustang Mach E	334K
Chevrolet Bolt EV	192K
Tesla Cybertruck	145K
Chevrolet E-Van	134K
Honda Insight	132K
Nissan Ariya	130K
Tesla Model X	129K

# ALTERNATIVE POWER ACCESSORIZATION PROFILE



Share of Alternative Power Owner Accessorizers in 2019

**\$0.43 Billion**  
Overall Market Size

**1%**  
Share of Specialty-Equipment Retail Sales

## Top Products Categories Purchased (in 2019)

Fender, Hood and Body Upgrades

Wax and Cleaning Products

Maintenance Oils and Additives

Floor Mats and Interior Appearance Products

Body Finishing Products

Suspension Products

Brake Products

Exterior Appearance Upgrades

Batteries and Related Products

Navigation and Driver Assist Systems



# ELECTRIFICATION IS GROWING BUT NOT MAINSTREAM

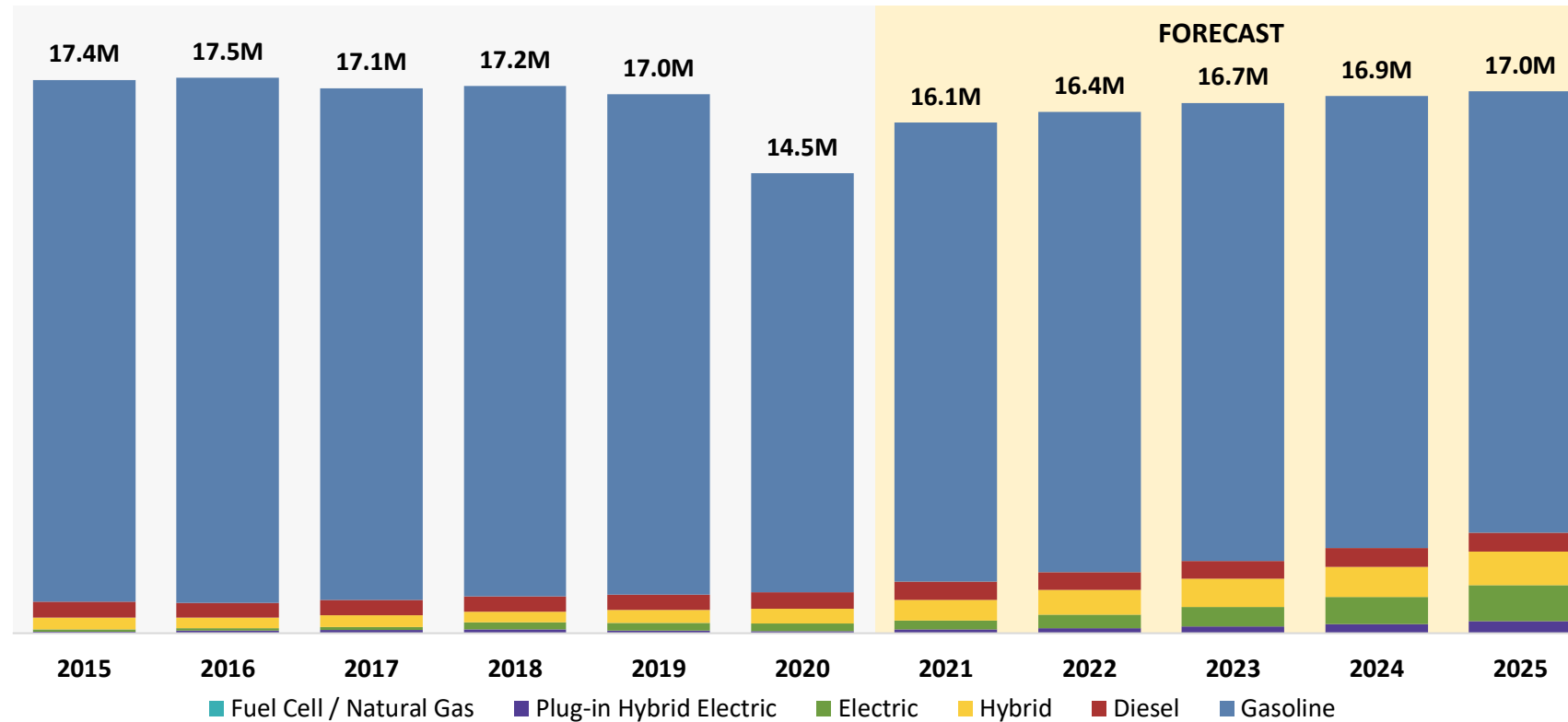
New Light Vehicle Sales: Powertrain Forecast

Sales Share  
By 2025

Sales of alternative energy vehicles are growing, but it will be a while before they are mainstream. Traditional internal-combustion engines will remain dominant for the foreseeable future. In 2025, gasoline engines are projected to still make up 82% of overall sales.

Electrics are growing, but in 2020, electrics only accounted for about 2% of sales. By 2025, we anticipate that number will jump to 7%. While this still may only represent a small share of vehicles, the percentage is growing at a very fast pace. Much of this can be attributed to the increase in the number of models available. By 2026, IHS estimates that there will be 130 electric models available across 43 brands. Electric powertrains will soon be available for every segment. What parts will people buy? Will consumers still accessorize electric pickups at the same rates? These will be important questions for the future.

That said, there are significant barriers to mainstream electric adoption. Lack of charging infrastructure, battery and range limitations, steep prices, and overall comfort level with the technology need to be overcome before there is general acceptance.



82%

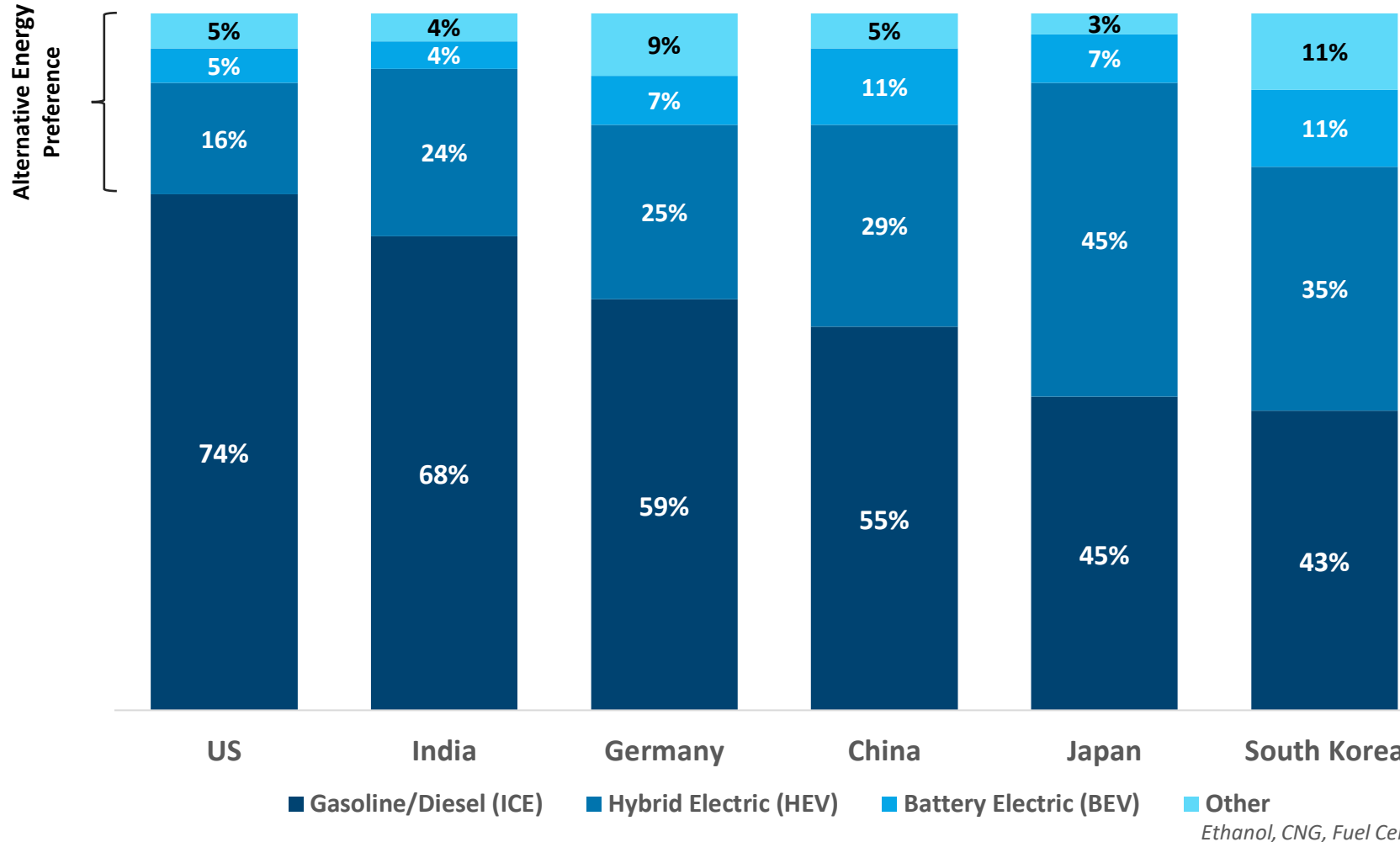
3%  
6%  
7%  
2%  
<1%

**By 2026, IHS estimates that there will be 130 electric models available across 43 brands in the United States.**

Source: SEMA Market Research Estimates / Avrio Institute  
 Source: ©2021 Wards Automotive, a division of Informa.  
 Source: Deloitte. "Electric Vehicles: Setting the Course for 2030." July 28, 2020.

# GLOBAL ACCEPTANCE OF ELECTRIC AND ALTERNATIVE ENERGY VEHICLES VARIES

Consumer Powertrain Preferences for Their Next Vehicle (2021)

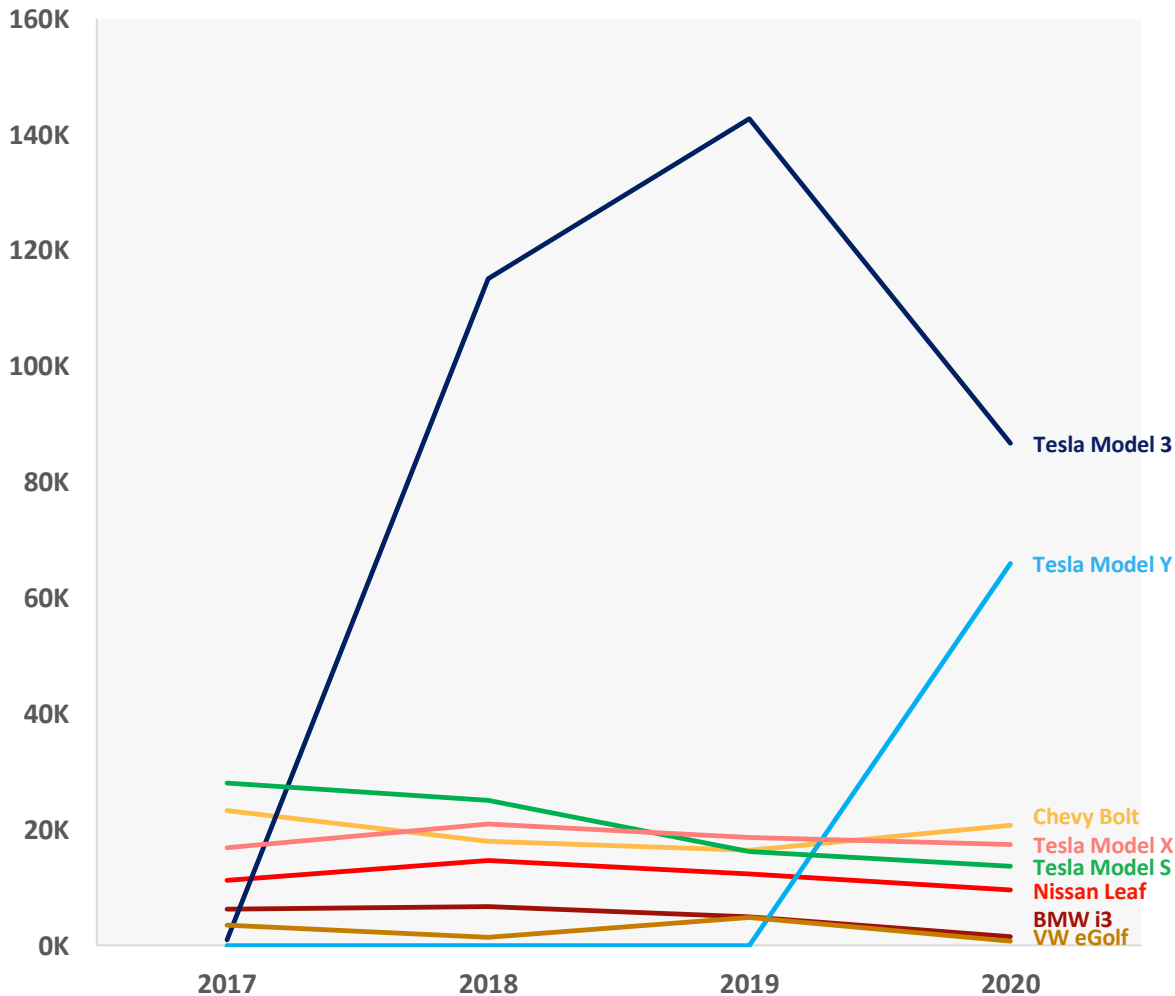


Global acceptance of electric and other alternative energy powertrains varies country to country, with the United States behind many. In 2021, 74% of Americans still preferred a traditional internal-combustion engine (ICE) for their next vehicle and only 5% said they wanted a battery electric (BEV). Compare that to South Korea, where 57% of the population prefers an alternative-energy powertrain for their next vehicle.

Americans still have a long way to go in their comfort level before they start to buy electric vehicles in large numbers. Consumers have not fully bought into the technology. They also don't believe there are enough charging stations or that they will be able to drive where they want to (sufficient range). Until more infrastructure is developed, and some of these consumer fears are reconciled, it will take a while before electrics have a strong presence on the road in the U.S.

# TESLAS CONTINUE TO DOMINATE SALES

Annual Sales of Select Electric Vehicle Models



Sales Forecast for Select Alternative Power Vehicles

	Projected 2021-2028 Sales
Tesla Model Y	826K
Tesla Model 3	631K
Toyota Prius	372K
Ford Mustang Mach E	334K
Chevrolet Bolt EV	192K
Tesla Cybertruck	145K
Chevrolet E-Van	134K
Honda Insight	132K
Nissan Ariya	130K
Tesla Model X	129K

Tesla will continue to dominate electric vehicle sales for at least the near future. Across all their different models, they are projected to sell nearly 1.9 million vehicles over the next eight years. As more electric models come out, they will likely eat into some of Tesla's market share, but Tesla will continue to lead the way.

# INFRASTRUCTURE AND RANGE REMAIN ISSUES

**41,000**

Level 2 and DC Fast Charging Stations

Across *Entire United States* (as of March 17, 2021)

vs.

**>113,000**

Gasoline Stations in the United States

	EPA Range Estimate*
2021 Tesla Model 3	353 mi
2021 Chevrolet Bolt EV	259 mi
2021 Nissan Leaf	226 mi
2021 Kia Niro Electric	239 mi
2021 Hyundai Kona Electric	258 mi
2021 Ford Mustang Mach E	211-300 mi
2021 Audi eTron	222 mi
2021 Porsche Taycan	192-201 mi

*\*Assuming 100% charge and ideal driving conditions. Range also varies by vehicle package and driving conditions.*

Electric vehicle range is highly variable, as many different factors can affect battery efficiency. Battery efficiency also degrades over time.

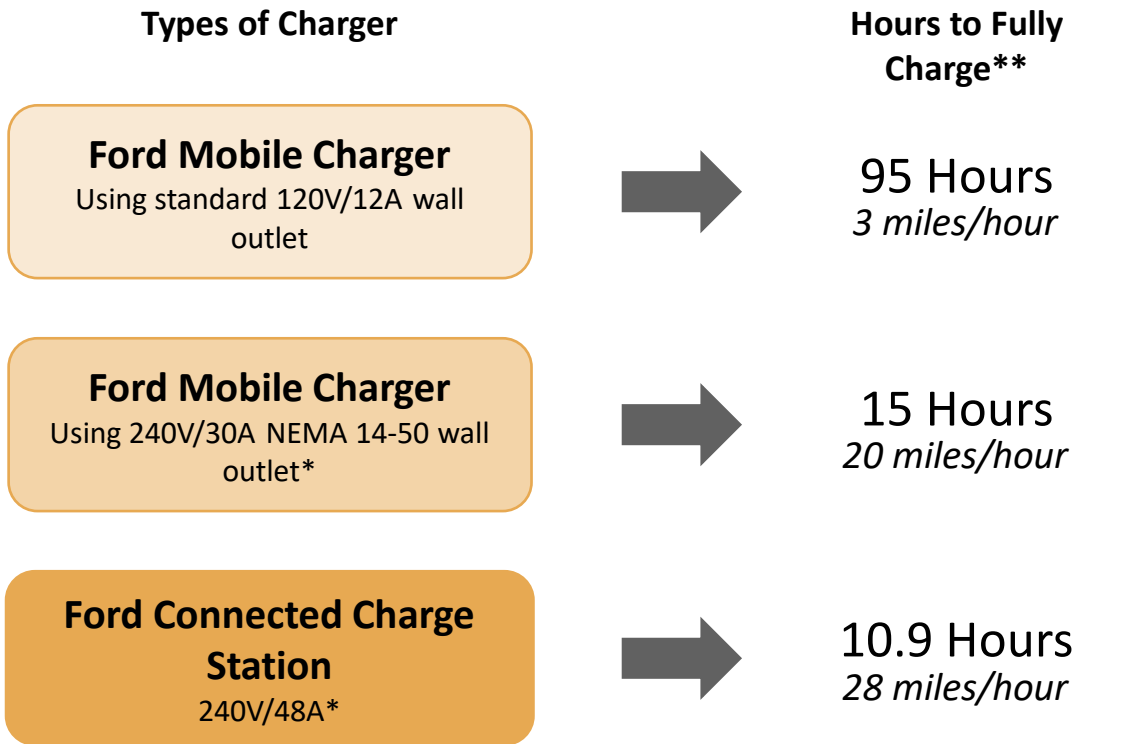
One key difference from traditional vehicles: **cold weather affects range dramatically.** Some drivers report significant range decreases (over 40%) in the cold. This will also limit mainstream adoption in parts of the country.

Charging stations, particularly fast charging, are still limited in the United States. While batteries continue to improve and push the ranges these vehicles can reach, electrics take much longer to fuel up than traditional engines. Even with the fastest charging stations (DC Fast Charging), it still takes 60-90 minutes to fully charge a battery to 100%. The infrastructure is not in place in the U.S. to support a wide-reaching network of these types of fast charging stations either, at least not yet. The most common electric charging station found in the U.S. are Level 2 stations, which can charge the average electric vehicle in eight hours or less—considerably slower. The technology will get better and faster charging will develop, but right now it's a limiting factor. Until the infrastructure improves, it will be challenging for electric vehicles to become fully mainstream, particularly for people who are unable to install faster charging options at home.



# HOW LONG DOES IT TAKE TO CHARGE AN ELECTRIC?

Charging time and range gained, particularly outside of a fast-charging station, varies by vehicle model, charger type and outlet used. Using a charger on a regular home outlet takes a significant amount of time, making topping off quickly unlikely. But even a fast charger takes some time to fully charge. Look at the 2021 Ford Mustang Mach-E, for instance:



2021 Ford Mustang Mach-E

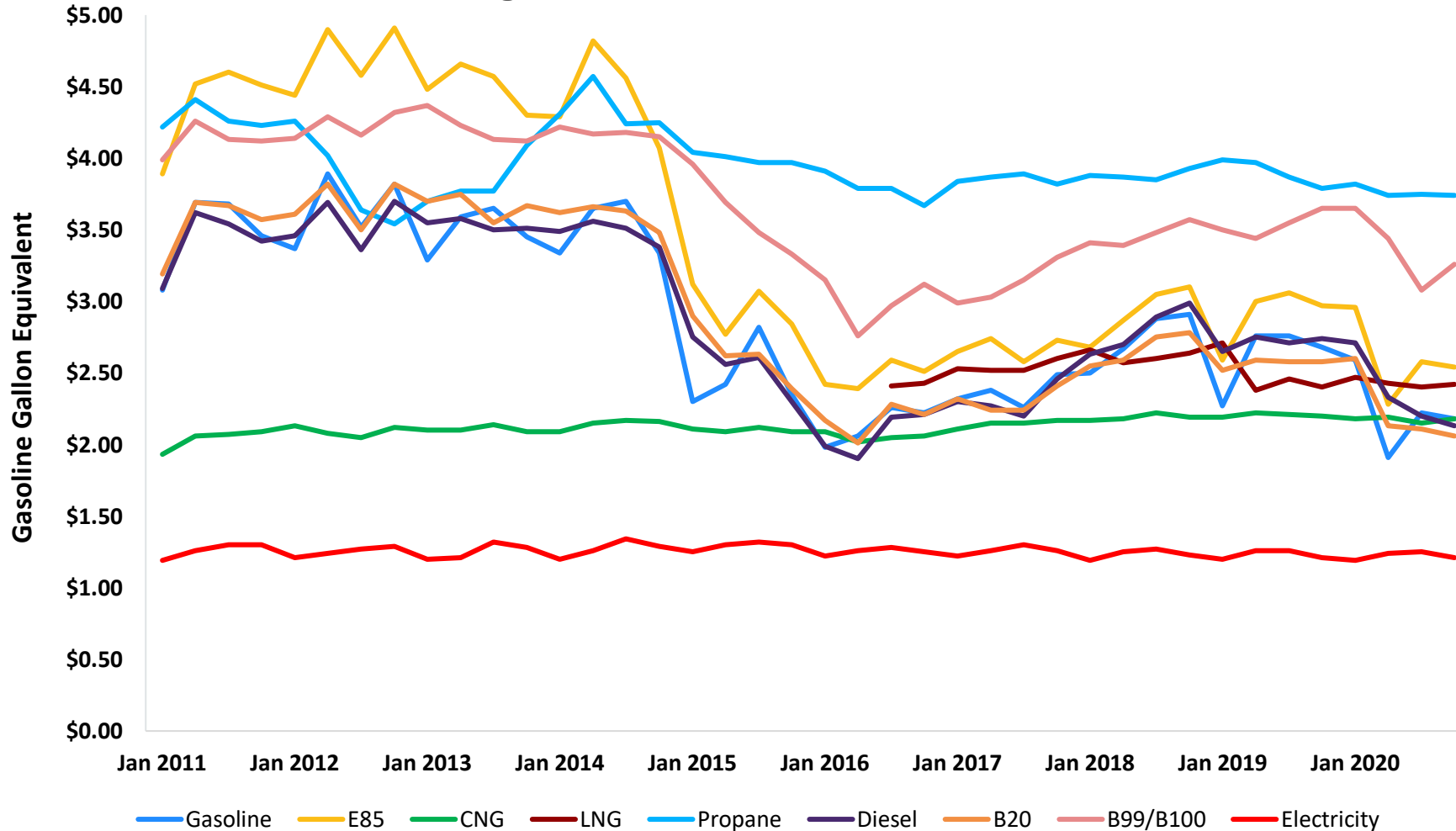
Trim/Package	EPA Range Estimate
Select	211-230 mi
California Route 1	300 mi
Premium	211-230 mi (Std. Range) 270-300 mi (Ext. Range)
GT	235-250 mi

\*Likely incurs additionally set-up cost if house isn't already equipped.

\*\*Charging time varies by a number factors, including weather and battery health.

# ELECTRIC CARS ARE NOT NECESSARILY CHEAPER TO FUEL THAN A TRADITIONAL CAR

Average Retail Fuel Prices in the United States



When the price of a gallon of gasoline is compared to a comparable amount of electricity, electricity is cheaper. However, when it comes to charging an electric vehicle, that doesn't mean it's cheaper to "fill up".

Take a Chevy Bolt EV for instance charging at a Level 2 station, the most common charging station in the United States. The Bolt gets 25 miles per hour of Level 2 charging. Charges vary, but the Blink charging network charges \$0.04-\$0.06 per minute or \$0.39-0.79 per kWh of charging (where allowed). At that rate, it would cost \$2.40-\$3.60 to get 25 miles of range. This could be more expensive than a gallon of gas which would provide the same or more range in a traditional car.

Level 3 charging stations are significantly faster. These stations can deliver 80% charge in 30-60 minutes and include Tesla's supercharger network. However, they are also more costly. At the highest level of charging, costs can be up to \$0.29 per minute or higher. Take a VW eGolf for instance, which would cost \$3.62 per 25 miles. Compare that to an average price of \$2.26 to fill up a standard Golf for the same distance.

If they cost more to drive, will consumers turn away from gas engines and move to electrics?

# WILL THE JEEP 4XE BE A HIT FOR OUR INDUSTRY?



**Jeep Wrangler 4xe**

**Price** Starting at \$47,995

**Range** 370 mi

**Release Date** Early 2021

The traditional Jeep Wrangler continues to be a hot-selling platform for our industry. Will the new hybrid electric Jeep Wrangler 4xe also gain similar interest among enthusiasts, particularly for off-roading? We anticipate that this new platform will also garner aftermarket interest, particularly for where the parts are compatible with gas-engine models. The new powertrain, however, will require a new strategy for upgrading performance.

# THE MUSTANG MACH-E IS HERE, BUT WILL ENTHUSIASTS BUY IT?



**2021 Ford Mustang Mach-E**

<b>Price</b>	Starting at \$42,895
<b>Range</b>	210-300 miles
<b>Projected Sales</b>	334K (2021-2028)
<b>Total Registered At End of 2020</b>	Rolling out currently; Fully nationwide by Summer 2021

The new Ford Mustang Mach-E CUV is finally here. While it shares the Mustang nameplate, it is a completely different vehicle—in a different segment and with a new powertrain. It is expected to sell well over the next decade, but will it be a hit for our industry? The Mustang traditionally is a versatile platform for enthusiasts. Will the Mach-E be one as well?

Automakers will continue to push out alternative energy platforms of their most popular vehicles. It's important for the specialty-equipment industry to adapt to this changing vehicle landscape and develop products and accessories for this growing segment.



# ADVANCED VEHICLE TECHNOLOGY



# ADVANCED DRIVING ASSIST SYSTEMS (ADAS) ARE BECOMING MORE COMMON

1

## Forward-Collision Avoidance Systems

- Forward-Collision Warning (FCW)
- Automated Emergency Braking (AEB)
- Automated Integrated Emergency Intervention

2

## Automated Performance Enhancement Systems

- Anti-Lock Braking Systems (ABS)
- Traction Control (TC)
- Electronic Stability Control (ESC)
- Specialty Applications

3

## Advanced Cruise Control Systems

- Adaptive Cruise Control (ACC)
- Low-Speed ACC: Traffic-Jam Assist
- Full-Speed ACC
- Cooperative Adaptive Cruise Control: Platooning (CACC)

4

## Lateral Collision Avoidance Systems

- Lane-Departure Warning (LDW)
- Blind-Spot Warning (BSW)
- Lane Keep Assist “Nudge” (LKA)
- Lane Centering

5

## Parking-Assistance Systems

- Passive Parking Assist
- Automated Parking Assistance
- Autonomous Valet

6

## Driver Vision Augmentation

- Adaptive Headlights
- Dynamic Responsive Headlights
- Infrared Night-Vision Display
- Heads-up Display (HUD)

7

## Connected Vehicle Systems

- Dedicated Short-Range Communication (DSRC)
- Commercial Cellular
- Other Communication Technologies

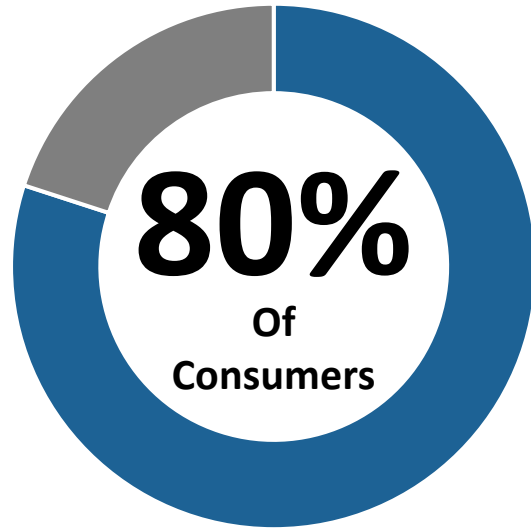
For more information on ADAS systems and aftermarket opportunity for them, download the “SEMA Advanced Technology Opportunity Report – 2017” at [www.sema.org/research](http://www.sema.org/research).

Top ADAS OEM Installations on New Cars (MY 2020 Vehicles)

	MY 2020 Installation Rate
Rear Object Sensor Camera	100%
Collision Warning	75%
City Speed Interval Mitigation	74%
Total Collision Mitigation	74%
Low Speed Interval Mitigation	74%
Lane Departure Alert	68%
Adaptive Pedestrian Detection	64%

Advanced driving assist systems (ADAS) and other advanced vehicle technologies are becoming more common in new vehicles. As per the National Highway Traffic Safety Administration (NHTSA), all new vehicles built after May 1, 2018, have a rear camera standard. Looking at model year 2020 vehicles, approximately 75% had a collision warning system installed, and over two-thirds had lane departure alert. As these features become more common, it may become more challenging to integrate some aftermarket products with them. There likely will be a market also for ADAS in older vehicles as well, as these systems become more common in newer vehicles.

# FULLY AUTONOMOUS VEHICLES ARE STILL MANY YEARS DOWN THE ROAD



Feel new vehicle safety technologies make them safer on the road.

50% Are skeptical of new technology in vehicles

73% Would be afraid to ride in a fully self-driving vehicle

“Carmakers and tech companies are very heavily focused on the context of driverless technologies...But, as many have begun to admit publicly, that future is further away than anybody has realistically considered...probably in the order of several decades, if not further away.”

**Business Insider**  
July 2020

“[There are] extremely difficult legal and ethical questions. They will take much longer to work out than the technology will need to function... Technically, we’re very close to fully autonomous cars, if not there already. But society, law and morals aren’t ready, and won’t be for many years.”

**Forbes**  
August 2020

## California Autonomous Vehicle Testing in 2020

- 63 companies testing
- 650 AVs reported mileage
- Nearly 2M AV miles reported
- 3695 reported incidents requiring human-driver intervention

California Department of Motor Vehicles (DMV)

While most Americans feel that advanced technologies in their vehicle make them safer, there is still a fair degree of uncertainty—particularly for vehicle autonomy. Nearly three-quarters are afraid to ride in a self-driving vehicle, and half are skeptical of the technology.

A lot of capital is being invested in autonomous technology. However, we are still far away from having fully autonomous vehicle fleets on the road. Companies continue to test the technology, but there are still significant legal and ethical issues that will take much longer to resolve.

Source: Auto Care Association (ACA), “Consumers and Vehicle Data”, October 2018

Source: Forbes, “Full Self-Driving Cars Are Still A Long Way Off – Here’s Why”, August 2020.

Source: Business Insider, “Experts say we’re decades from fully autonomous cars. Here’s why”. July 2020.



# ADDITIONAL INFORMATION





# GLOSSARY / VEHICLE NET DEFINITIONS

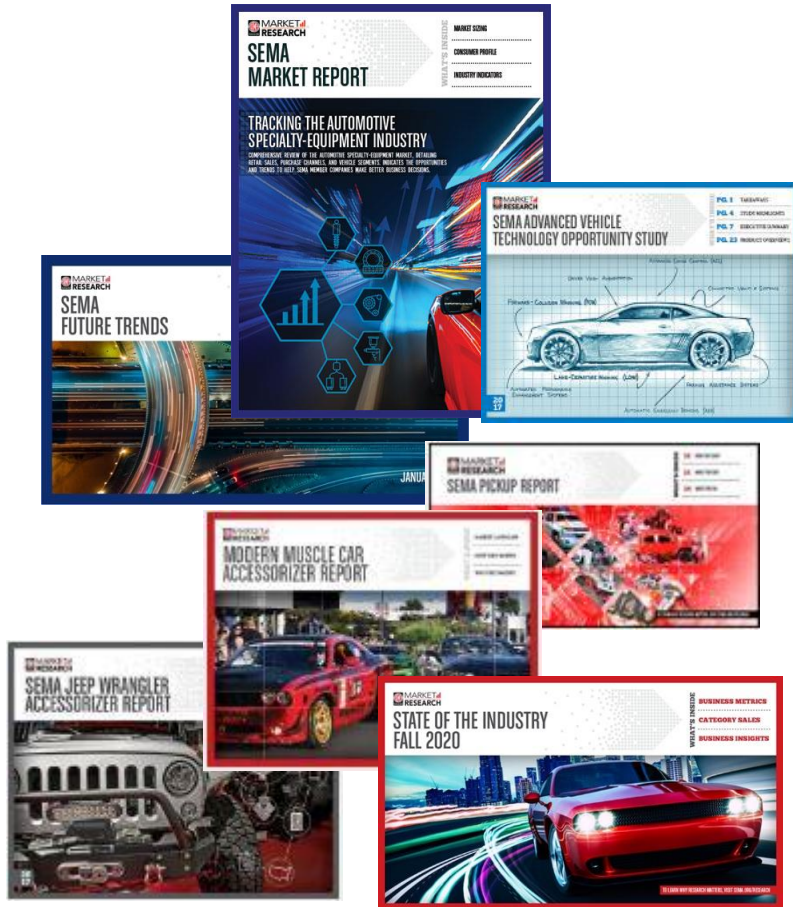
Vehicle models with rebadged variants or that were otherwise extremely similar to other vehicle models were combined for simplicity in the analysis. Here are netted models referenced in the report:

<b>Audi A4</b>	<i>Audi A4, S4, RS4</i>
<b>Audi Q5</b>	<i>Audi Q5, SQ5</i>
<b>Chevrolet Camaro</b>	<i>Chevrolet Camaro, Pontiac Firebird</i>
<b>Chevrolet Suburban</b>	<i>Chevrolet or GMC Suburban</i>
<b>Chevrolet Tahoe</b>	<i>Chevrolet Tahoe, GMC Yukon</i>
<b>Chevy Traverse</b>	<i>Chevrolet Traverse, Buick Enclave, Saturn Outlook, GMC Acadia</i>
<b>Dodge Challenger</b>	<i>Dodge Challenger, Plymouth Barracuda</i>
<b>Dodge Dakota</b>	<i>Dodge/Ram Dakota, Mitsubishi Raider</i>
<b>Dodge Durango</b>	<i>Dodge Durango, Chrysler Aspen</i>
<b>Ford Escape</b>	<i>Ford Escape, Mazda Tribute, Mercury Mariner</i>
<b>Ford Explorer</b>	<i>Ford Explorer, Mercury Mountaineer, Lincoln Aviator, Mazda Navajo</i>
<b>Ford Expedition</b>	<i>Ford Expedition, Lincoln Navigator</i>

<b>Ford Mustang</b>	<i>Mercury Capri (model years 1979-1993 only), Ford Mustang. Excludes the Mustang Mach-E.</i>
<b>Ford Ranger</b>	<i>Ford Ranger, Ford Courier, Mazda B-Series</i>
<b>GM Full Size Pickup</b>	<i>Chevrolet or GMC C/K Series Pickup, Chevrolet Silverado, Chevrolet Avalanche, GMC Sierra, Cadillac Escalade EXT.</i>
<b>GM Mid-Size</b>	<i>Chevrolet S10 Pickup, GMC S15 Pickup, Chevrolet Colorado, GMC Sonoma, GMC Canyon, Isuzu I Series, Isuzu Hombre.</i>
<b>Nissan Frontier</b>	<i>Nissan Frontier, Suzuki Equator</i>
<b>Nissan Maxima</b>	<i>Nissan/Datsun Maxima, Nissan/Datsun 810, Infiniti I30, Infiniti I35</i>
<b>Nissan Rogue</b>	<i>Nissan Rogue, Nissan Rogue Sport, Nissan Rogue Select</i>
<b>Subaru Impreza</b>	<i>Subaru Impreza, Subaru Hatchback, Saab 9-2X</i>
<b>Toyota Corolla</b>	<i>Toyota Corolla, Scion iM</i>
<b>Toyota Prius</b>	<i>Toyota Prius, Prius C, Prius V, Prius Prime</i>
<b>VW Jetta</b>	<i>Volkswagen Jetta, Volkswagen Jetta GLI</i>

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# Questions?

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