



S E M A

# SEMA LIGHT-TRUCK SNAPSHOT

GROWING DIVERSITY OF THE MARKET



# WELCOME TO THE SEMA LIGHT-TRUCK MARKET SNAPSHOT

Light trucks—pickups, SUVs, CUVs, and vans—are a diverse and growing group of vehicles. Over the past few decades, light trucks have overtaken cars to represent the majority of vehicles on the road in the United States. They also account for the bulk of sales in the specialty-equipment market, with pickups alone representing nearly a third of total sales. But the light-truck market is evolving, shaped by trends in vehicle sales, technology, and consumer behavior.

What does the market for light trucks look like? How is it changing? What do businesses need to know in order to succeed amid the growing diversity of the light-truck market?

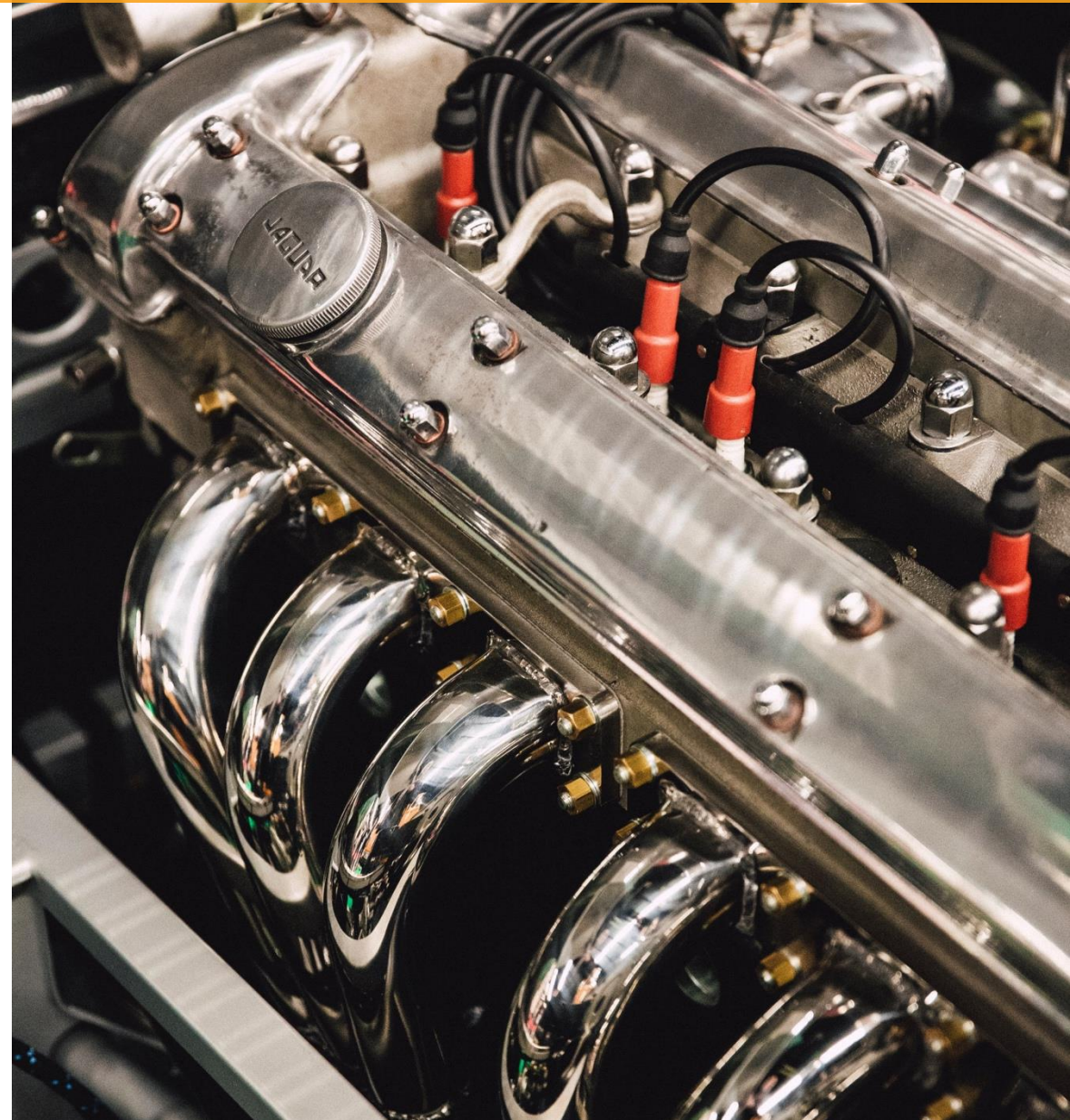
This report will help answer these questions and more. With this report, your business can get a better understanding of the light-truck market and where it's going, so that you can have more success in 2021 and beyond.

This report is meant to help you understand the overall truck 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, visit our website at [www.sema.org/research](http://www.sema.org/research).



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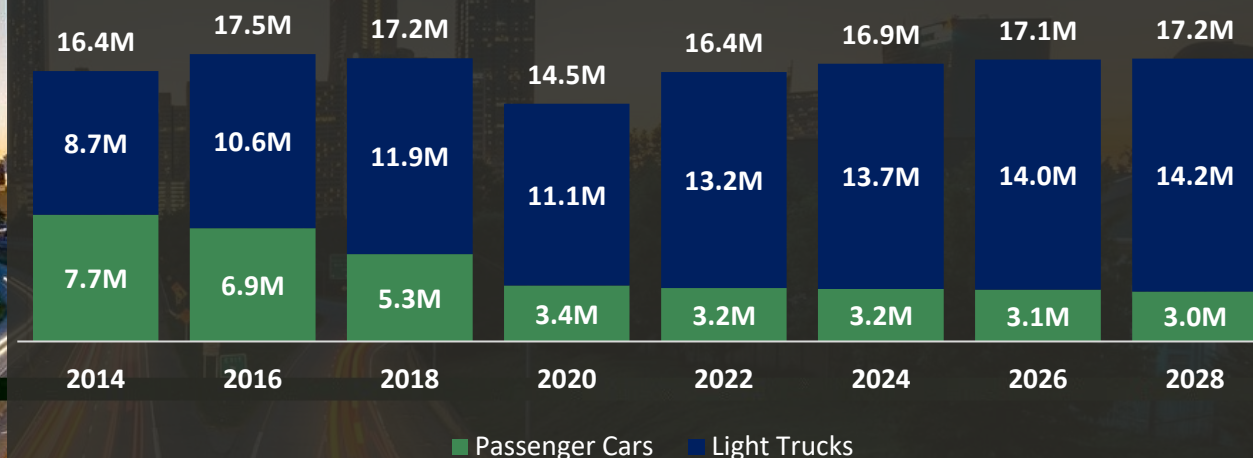


# THE LIGHT-TRUCK MARKET IS DIVERSE AND GROWING

Light trucks represent the majority of passenger vehicles sold in the United States and their share is growing.

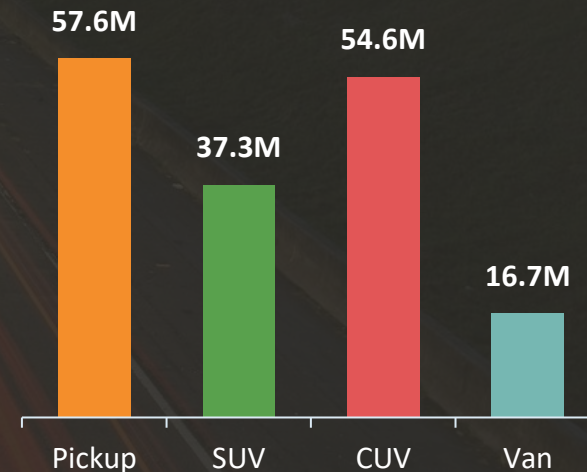
- By 2028, light trucks are expected to make up 82% of all new light vehicles sold, driven largely by the popularity and growth of CUVs.
- Pickups represent the largest segment of light trucks on the road and are a key part of the specialty-equipment industry and community.
- But the light-truck market is more than pickups; CUVs, SUVs and vans are all considered part of the light-truck category.

## New Light-Vehicle Sales Forecast by Vehicle Type



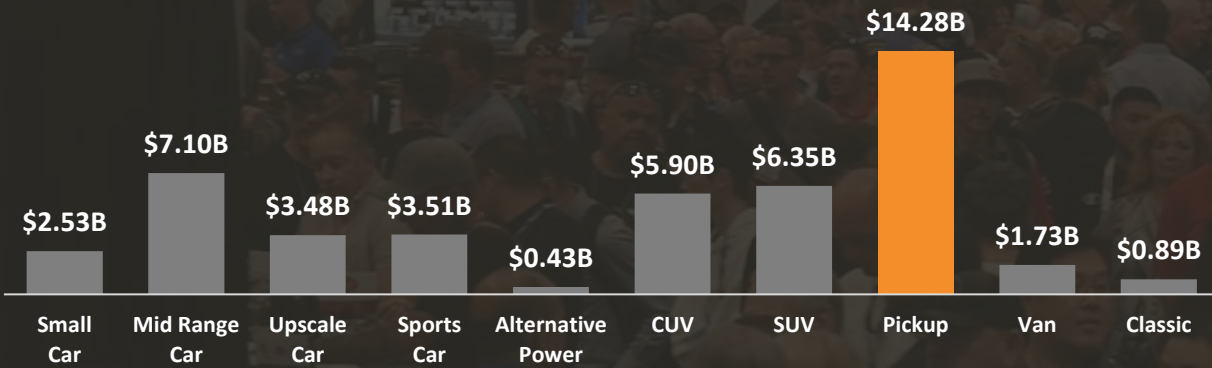
## Light Trucks on the Road

Total Registered as of Q4 2020



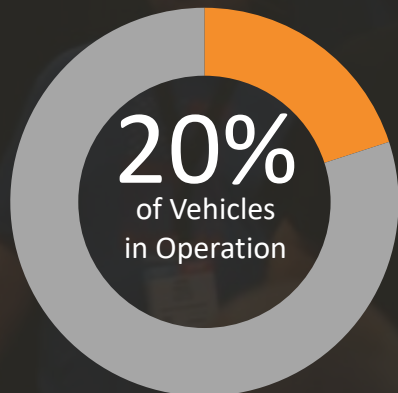
# PICKUPS PARTS ARE THE BIGGEST SPECIALTY-EQUIPMENT SEGMENT

### 2019 Aftermarket Sales Estimates by Vehicle Segment



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

### Pickups Represent...

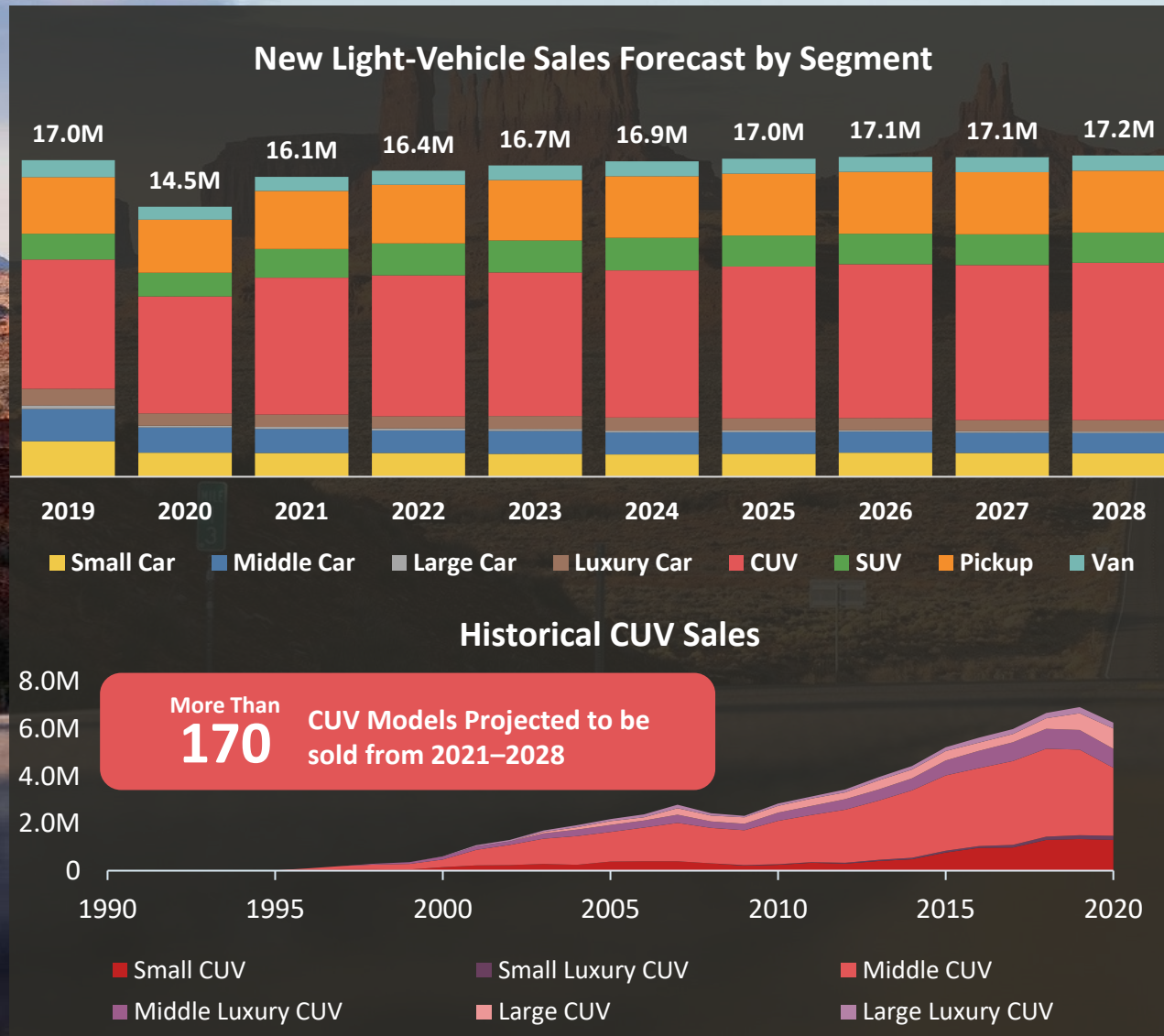


And



- Pickups represent the largest share of the specialty-equipment market and account for nearly a third of all retail dollars spent in our industry.
- Fullsize pickups, such as the Chevrolet Silverado 1500 and Ford F-150, lead the way due to the large numbers on the road and popularity with enthusiasts.
- Midsize pickups have been making a comeback recently, and the specialty-equipment industry is taking notice.
- With new smaller pickups and even electric models on the horizon, the pickup segment is only going to get more diverse.

# CUVS ARE DRIVING NEW VEHICLE SALES



A proliferation of crossover models and shifting consumer preferences have turned CUVs into the fastest-selling vehicle segment.

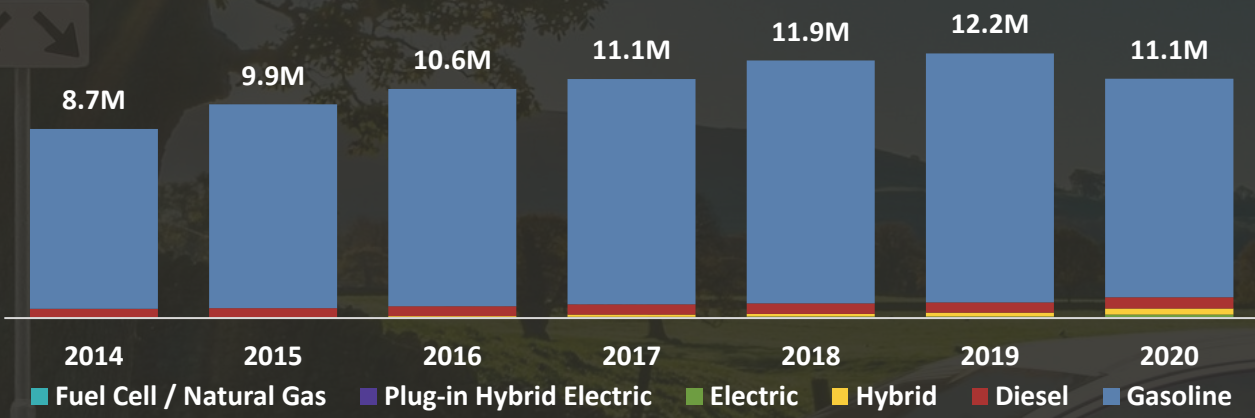
- While CUVs have only been around since the mid-1990s, they have exploded in popularity and represent the biggest share of new vehicles sold.
- With around 130 models on the road and more than 170 models expected to be sold in the next few years, CUVs represent a highly fragmented and diverse vehicle segment.
- Specialty-equipment enthusiasts and businesses have not fully embraced CUVs, and it remains to be seen whether consumers will begin to modify them like SUVs or treat them more like passenger cars.

# TECHNOLOGY IS CHANGING IN THE LIGHT-TRUCK AFTERMARKET

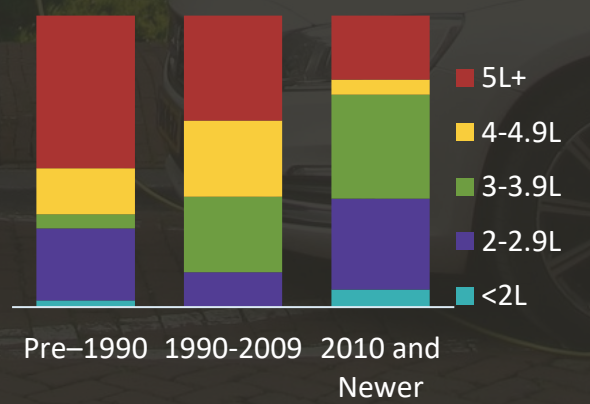
Light-truck powertrains and technologies are evolving, and the changes have implications for the aftermarket.

- Over the past 30 years, we have seen a gradual but steady shift towards smaller engines in light trucks. At the same time, forced induction has become more prevalent as a way to boost power in these smaller engines.
- Alternatives like hybrid and electric powertrains are just starting to catch on in the light-truck market, but they are likely to come quickly to the segment.
- New vehicle technologies like ADAS are also becoming more common, and may affect how specialty truck parts are designed, produced and installed.

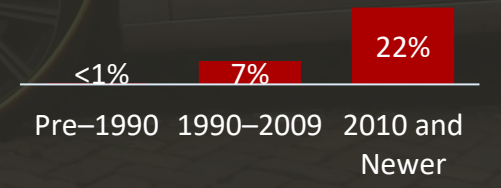
### Light-Truck Powertrains Sold



### Breakdown of Light-Truck Engines on the Road

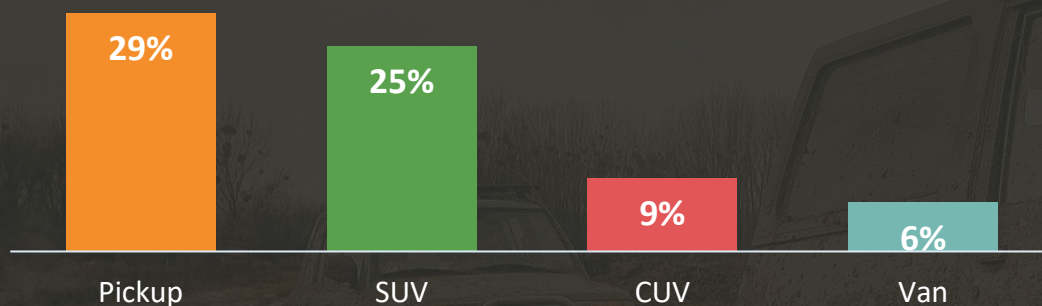


### Forced Induction in Current Light Trucks

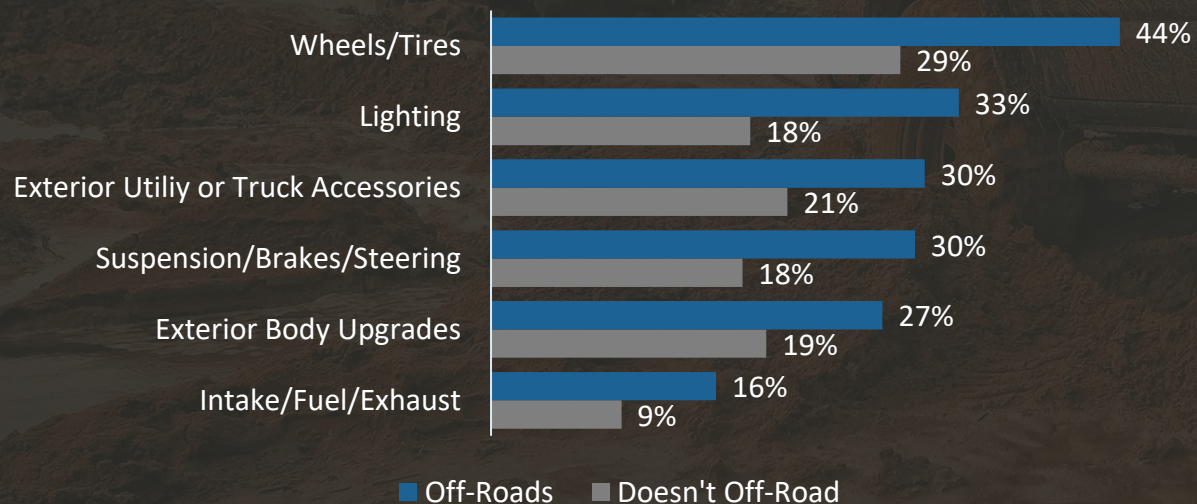


# OUTDOOR RECREATION RELIES ON LIGHT TRUCKS

Share of Modified Light Trucks That Go Off-Road



Part Types Bought in 2019 – Off-Road vs. Non-Off-Road Trucks



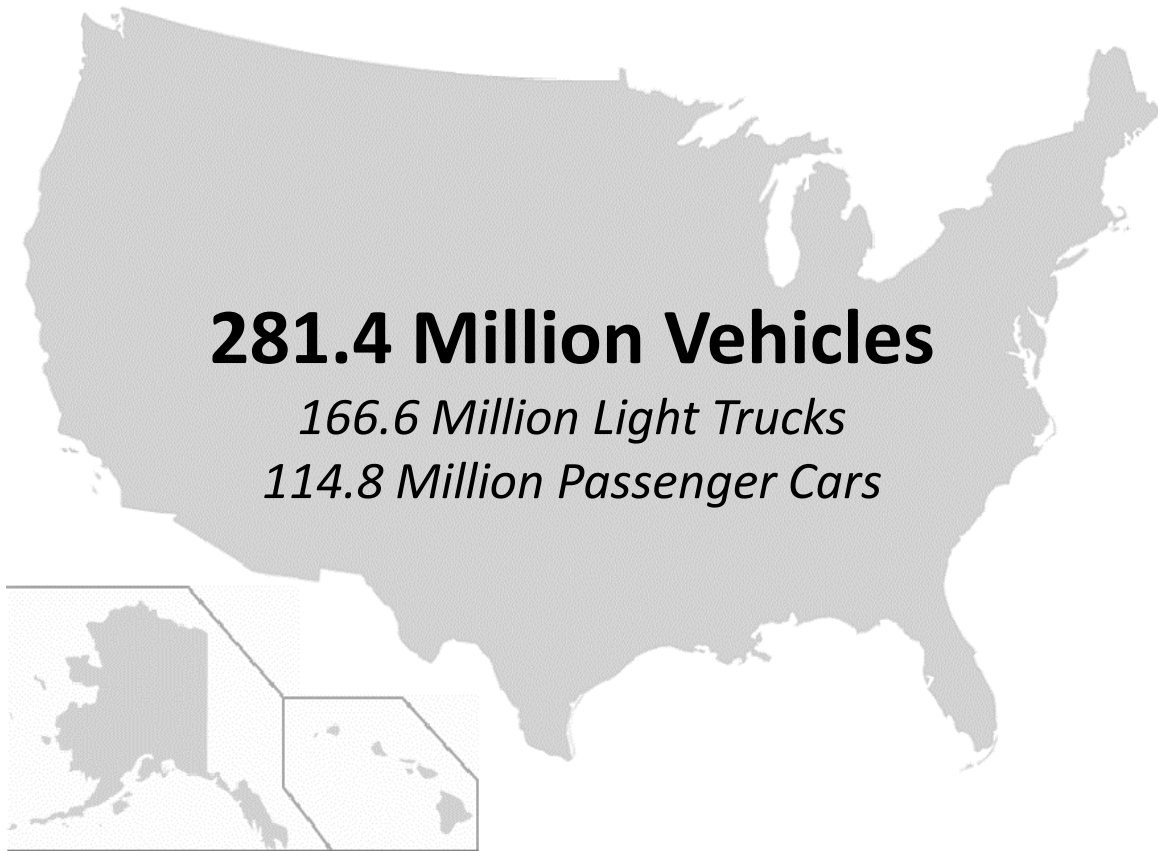
Light trucks, particularly pickups and SUVs, have a strong outdoor and off-road culture that drives aftermarket opportunity.

- Light trucks are usually favored over cars for outdoor pursuits due to their greater ability to tow or haul cargo and handle rough terrain.
- COVID-19 triggered a spike in interest in off-roading, overlanding, and recreational vehicles. Towable RVs and off-highway vehicles (e.g., UTVs, dirt bikes, etc.) have seen significant year-over-year sales growth, and trucks are the preferred way to get them to the trail or campsite.
- While it remains to be seen how sustained this trend will be, it bodes well for the light-truck market while it persists.

# OVERALL VEHICLE LANDSCAPE

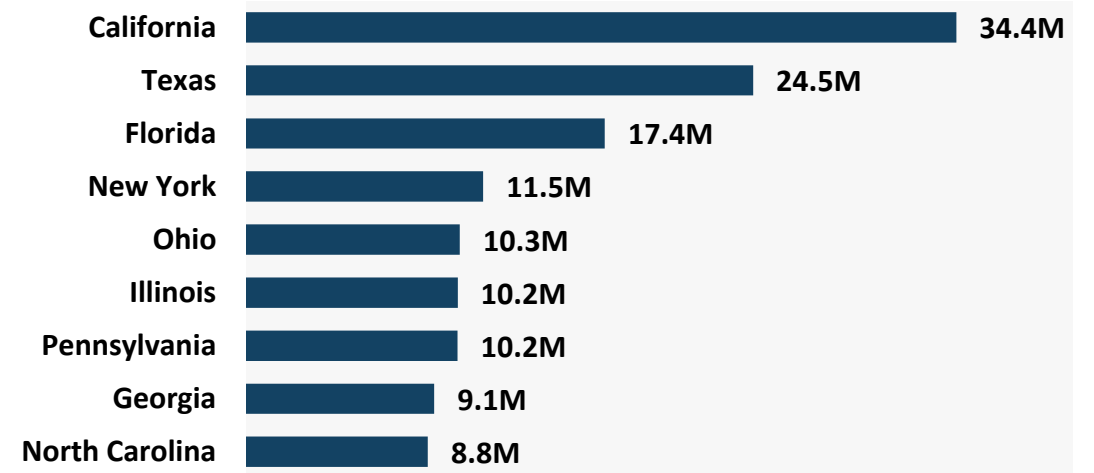


# HOW MANY VEHICLES ARE ON THE ROAD TODAY?

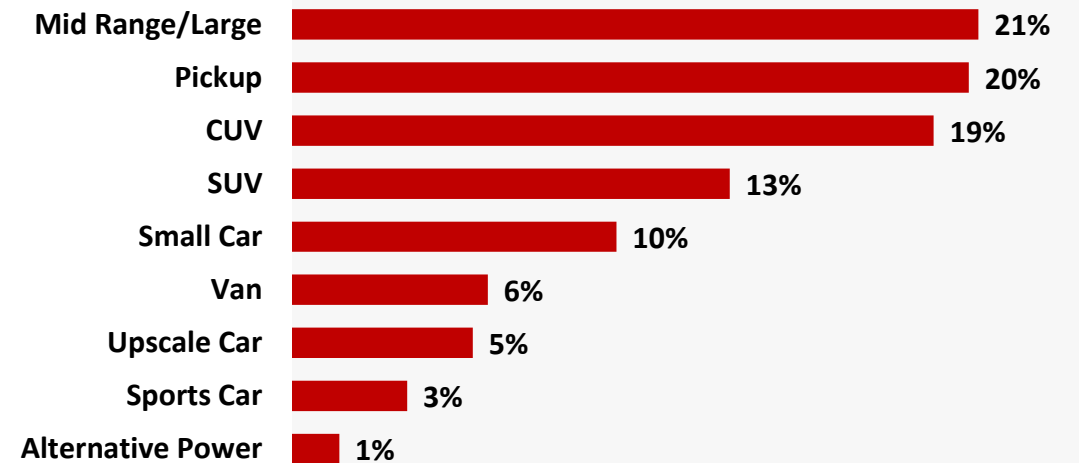


Note: Passenger vehicles, which excludes heavy-duty, commercial, and fleet vehicles.

## 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

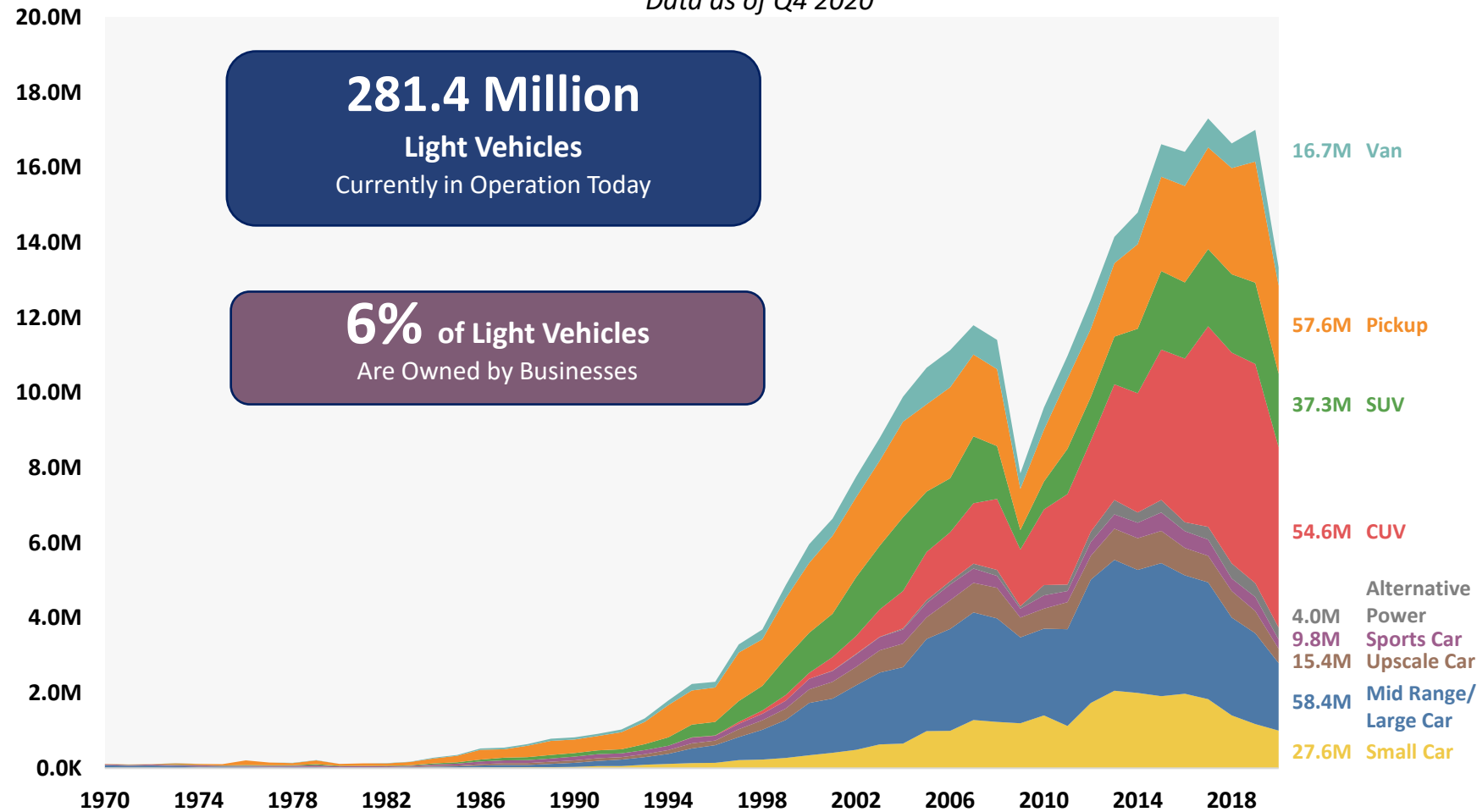


Chart does not show pre-1970 and 2021/2022 model years, but those are included in segment totals.

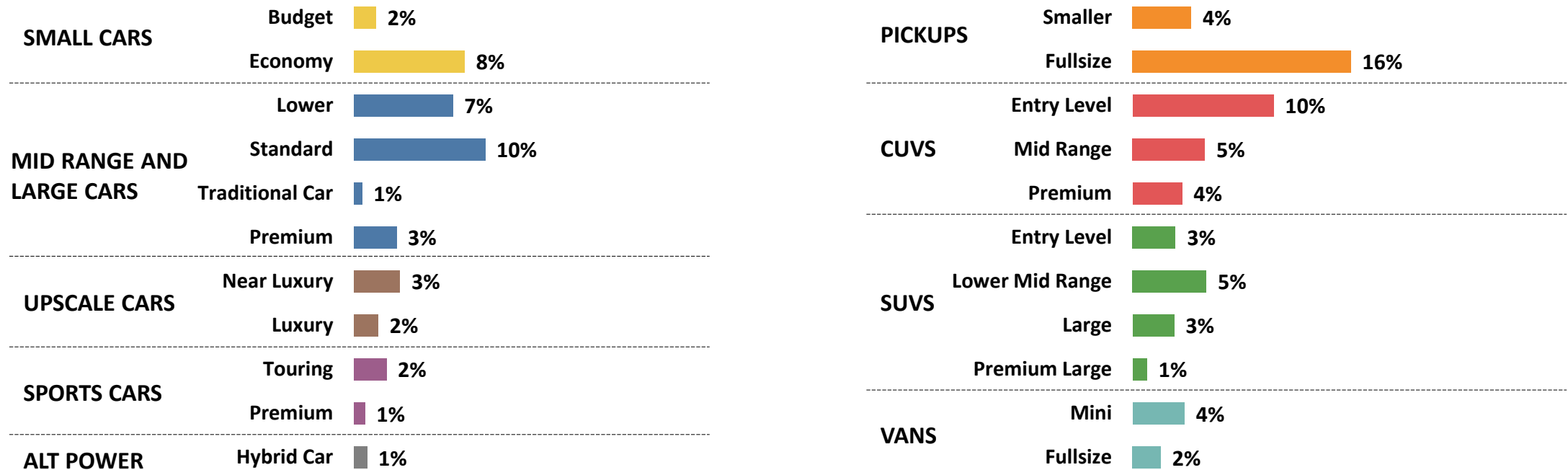
Vehicle preferences among Americans are changing. Light trucks (pickups, SUVs, CUVs and vans) are becoming a larger share of the overall vehicle population, as OEMs shift their production away from passenger cars to more profitable light-truck platforms. This has been largely driven by the explosion 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 more than 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.

Within pickups, we are also seeing a shift in the vehicle population. For the past couple decades, fullsize pickups dominated sales, but in recent years midsize models have been making a comeback. With a lower price point than their larger counterparts, these smaller trucks are both easier to obtain and may also be attractive for enthusiasts who would prefer to spend more on customizing the vehicle after it leave the dealership.

# 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.

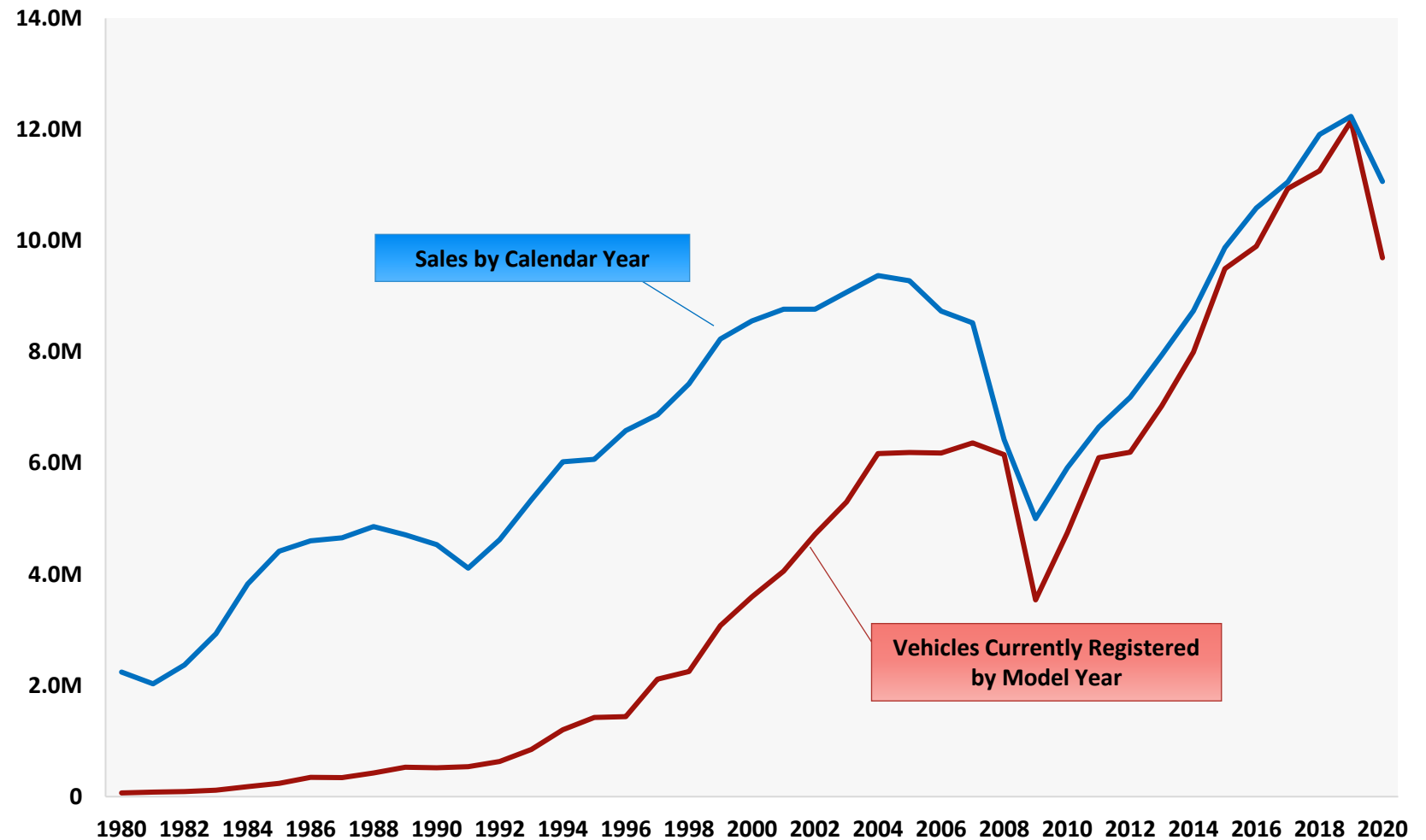
Fullsize pickups are the most common vehicle subsegment on the road today, driven primarily by the popularity of the Ford F-series and GM fullsize pickups. Entry-level CUVs are also quite common. Despite their growing popularity, alternative energy remains a very small proportion of the U.S. light-vehicle 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.

# LIGHT TRUCKS HAVE BECOME HEAVY-DUTY BUSINESS

While most of the vehicles sold prior to 1990 were cars, over the past 30 years there has been a dramatic shift towards light trucks. Slightly more than 2 million light trucks were sold in 1980 in the United States, but by the mid-2000s that number had skyrocketed to almost 10 million. By 2018, roughly 12 million of the 17 million new light vehicles sold were light trucks—CUVs, pickups, SUVs, and vans.

Most of the more than 166 million light trucks 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. Scrappage rates increase significantly once a vehicle has been on the road for more than 10 years, and while pickups may buck this trend to some extent, the reality is that newer light trucks heavily outnumber older ones on the road.

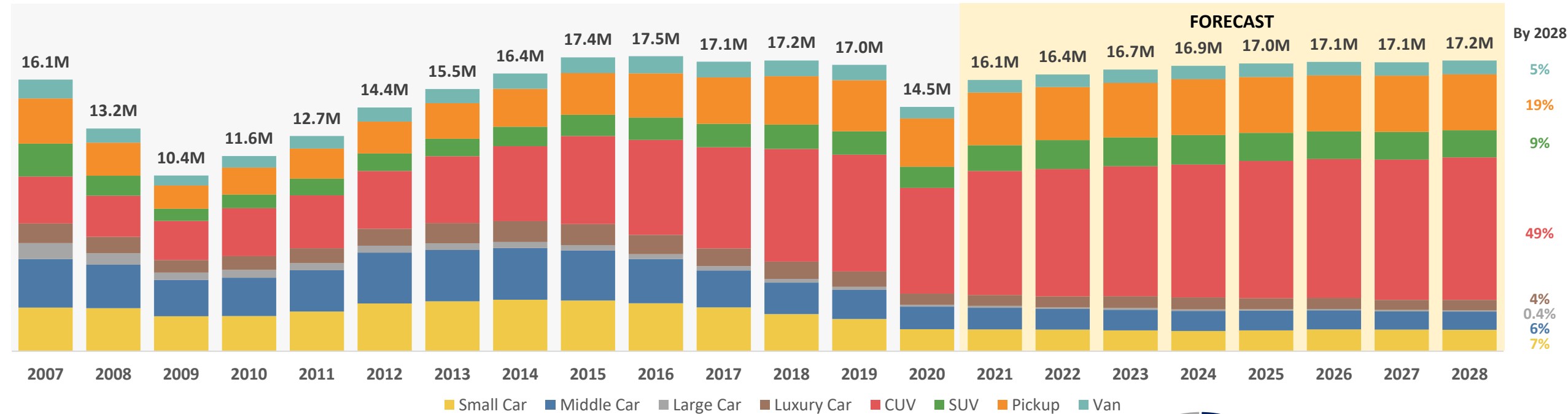
As a result, the biggest opportunities for the light-truck market remain in newer vehicles. While older vehicles get significant engagement within our industry, this vehicle population will only get smaller over time. Today's new trucks are tomorrow's classics, and today's classics are only getting rarer.



Note: Only data through the end of 2020 shown.

# CUVs DOMINATE SALES, BUT PICKUPS REMAIN POPULAR

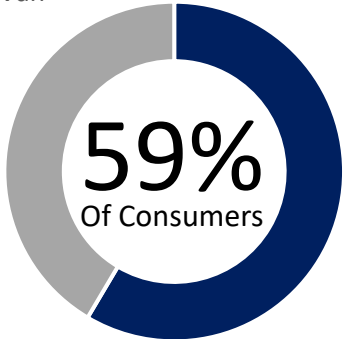
## U.S. New Light-Vehicle Sales Forecast



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 more than \$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*



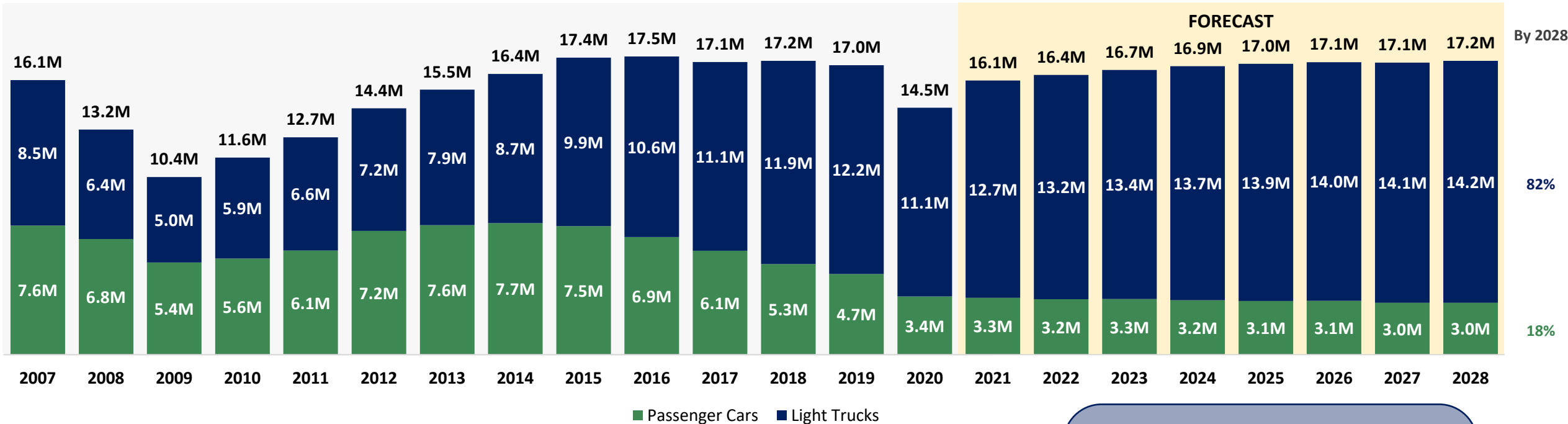
Think it's a good time to buy a car.

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.

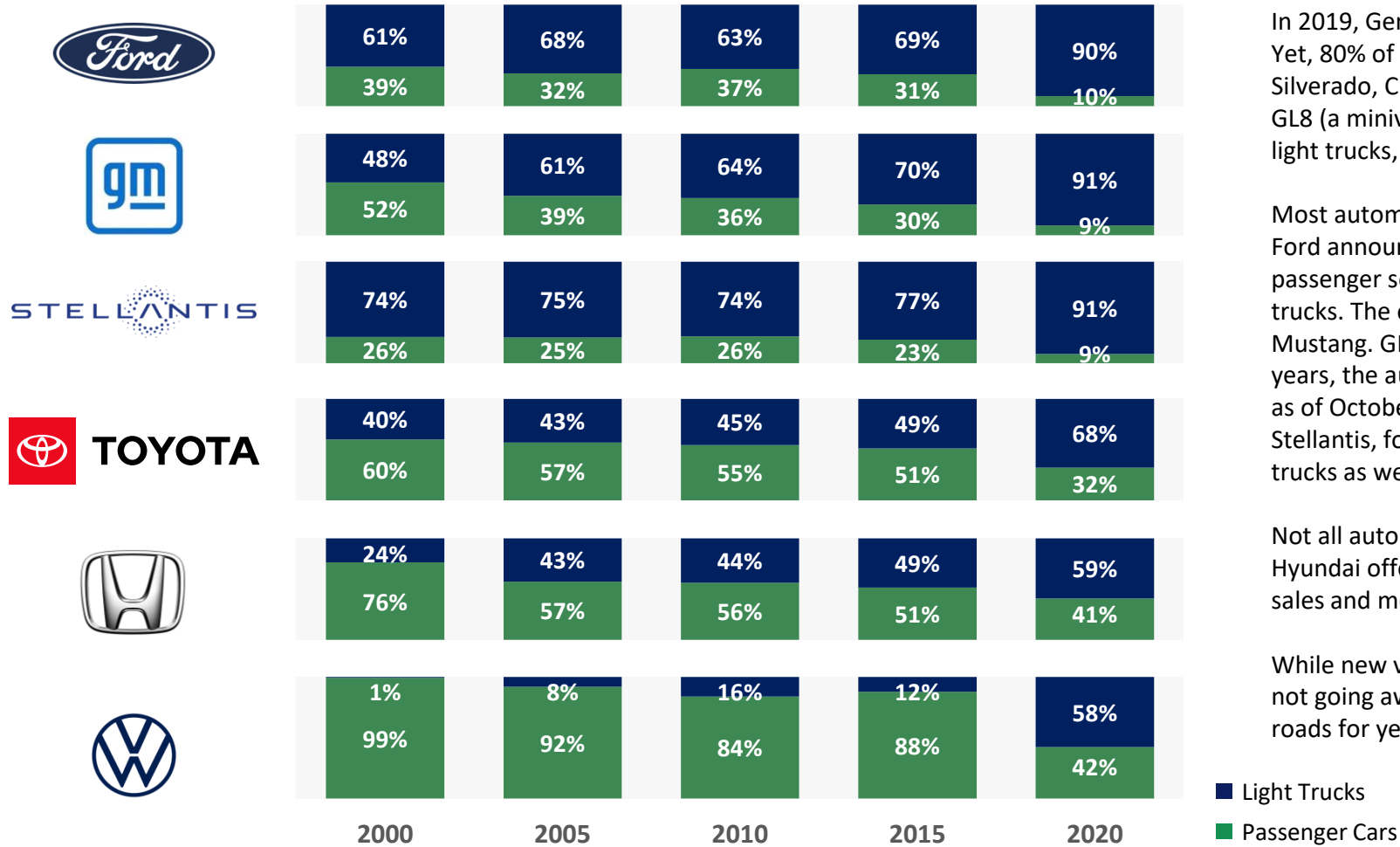
CUVs have driven the growth of light truck sales:

**130+** CUV models currently on the road

**More Than 170** CUV models projected to be sold from 2021-2028

# AUTO MANUFACTURERS SHIFT TO 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), 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 more than 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

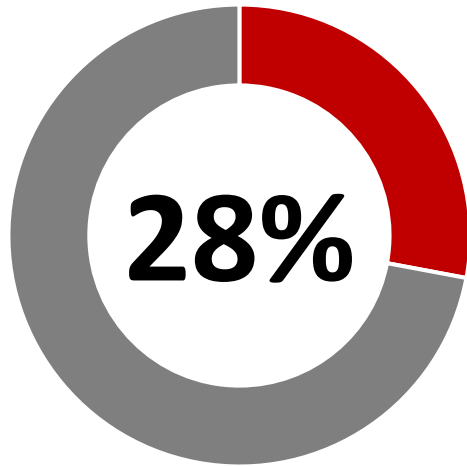
Source: ©2021 Wards Intelligence, a division of Informa. Data as of March 2021.

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

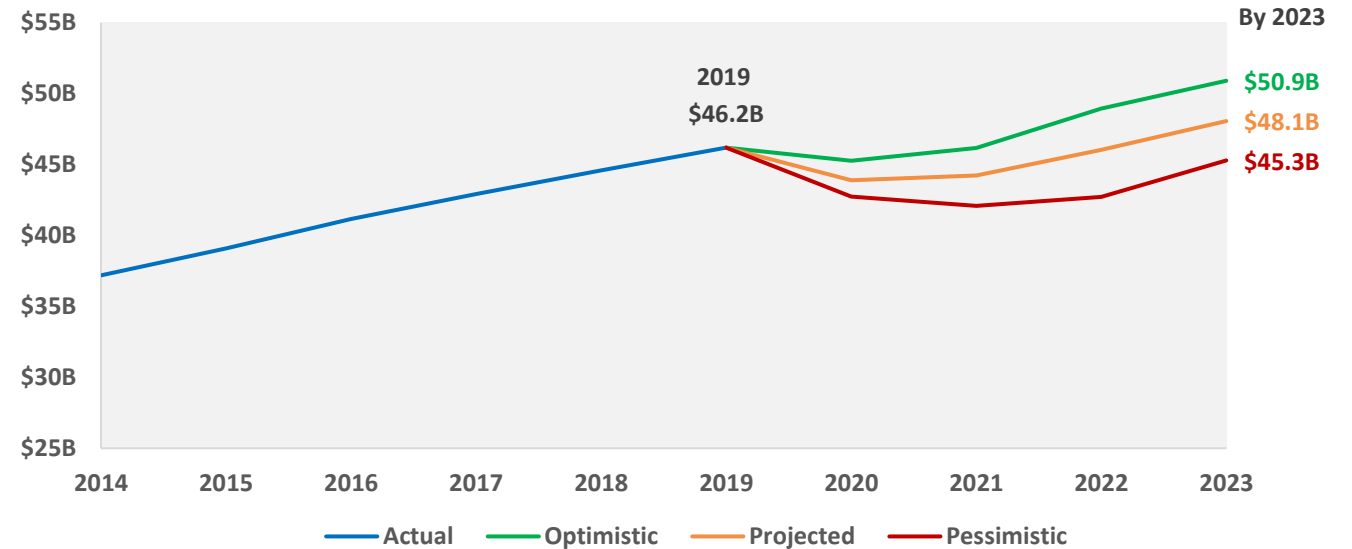


**28% of Drivers Purchase Specialty-Equipment Parts Each Year**  
*35.9 Million Households Each Year*

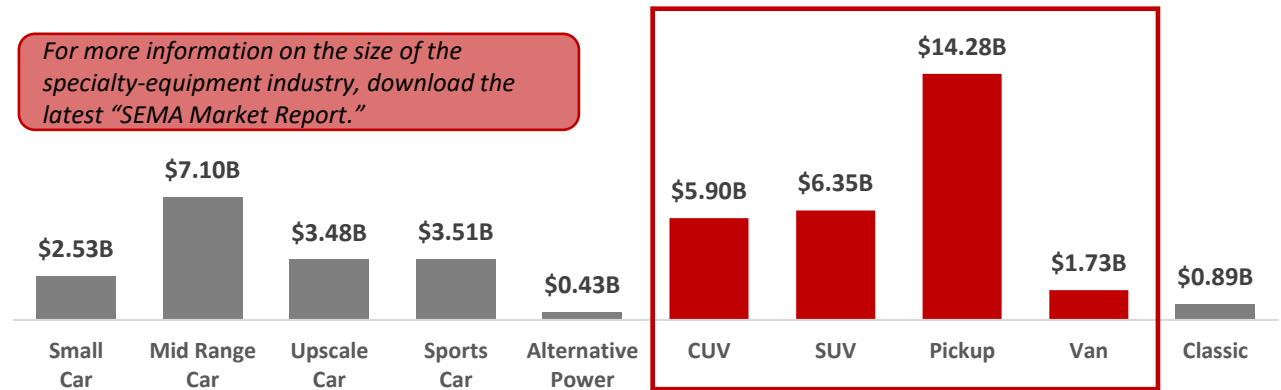
Light trucks form the bulk of the specialty-automotive aftermarket, with pickup products alone representing over a quarter of retail sales in a given year.

While COVID-19 certainly disrupted the supply chain for specialty truck parts, and some businesses have definitely taken a hit, others have posted record sales years due to consumers finding themselves with more time, and money, to spend on their vehicles. While the long-term impact remains to be seen, in the short term the effects have been mixed rather than negative.

Specialty-Equipment Market Size Forecast

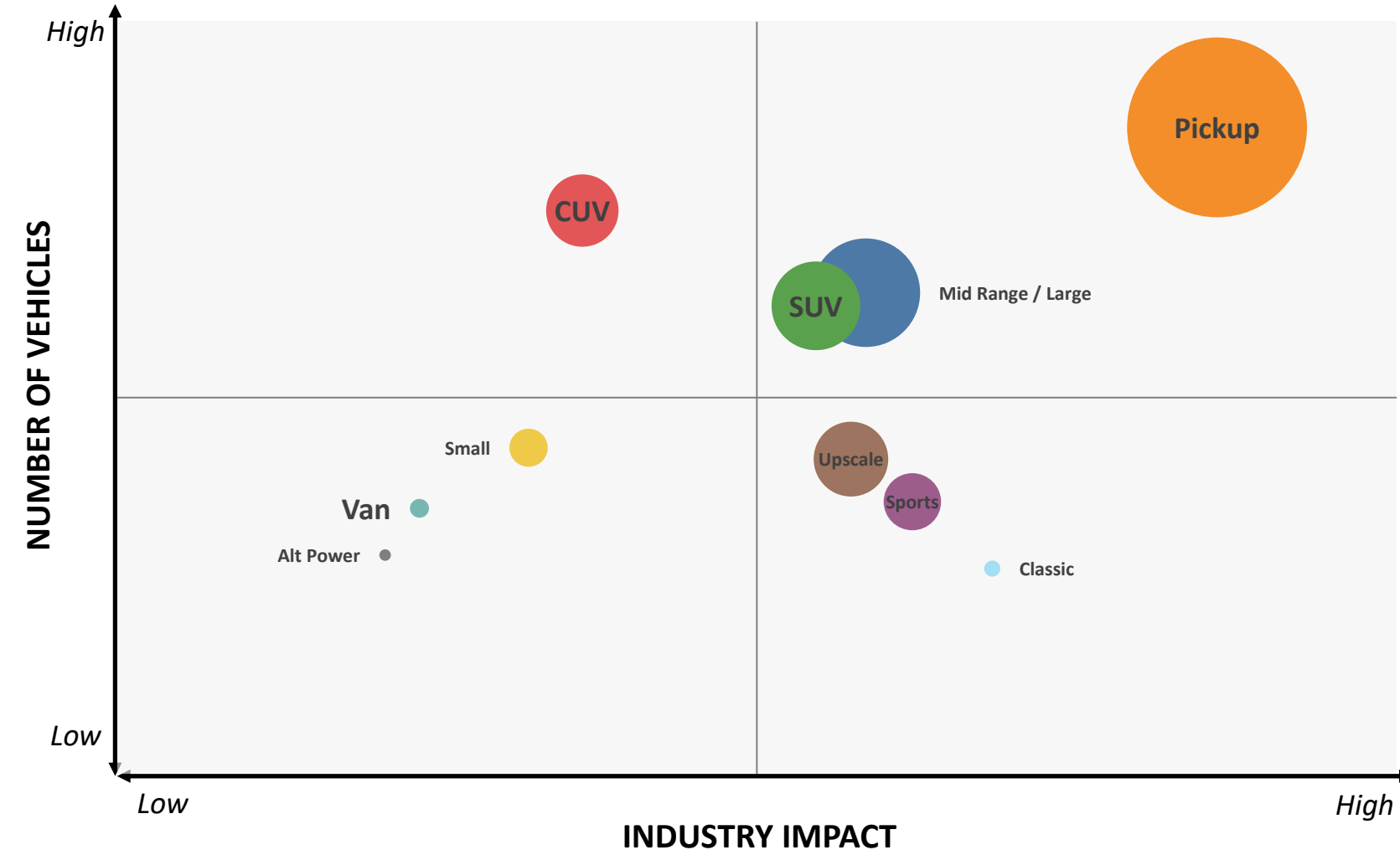


2019 Aftermarket Sales Estimates by Vehicle Segment



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

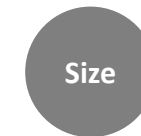
# WHAT SEGMENTS HAVE THE MOST OPPORTUNITY?



Pickups are the largest segment for the specialty-equipment industry, accounting for 31% of retail sales. They are among the top-selling vehicles and offer versatile platforms for accessorization. It's not hard to see why they are so prominent in the specialty aftermarket.

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.

SUVs sit towards the middle. Some models, like the Jeep Wrangler, are popular among enthusiasts and end up frequently modified, while others are more utilitarian and have less traction in the specialty-equipment community.



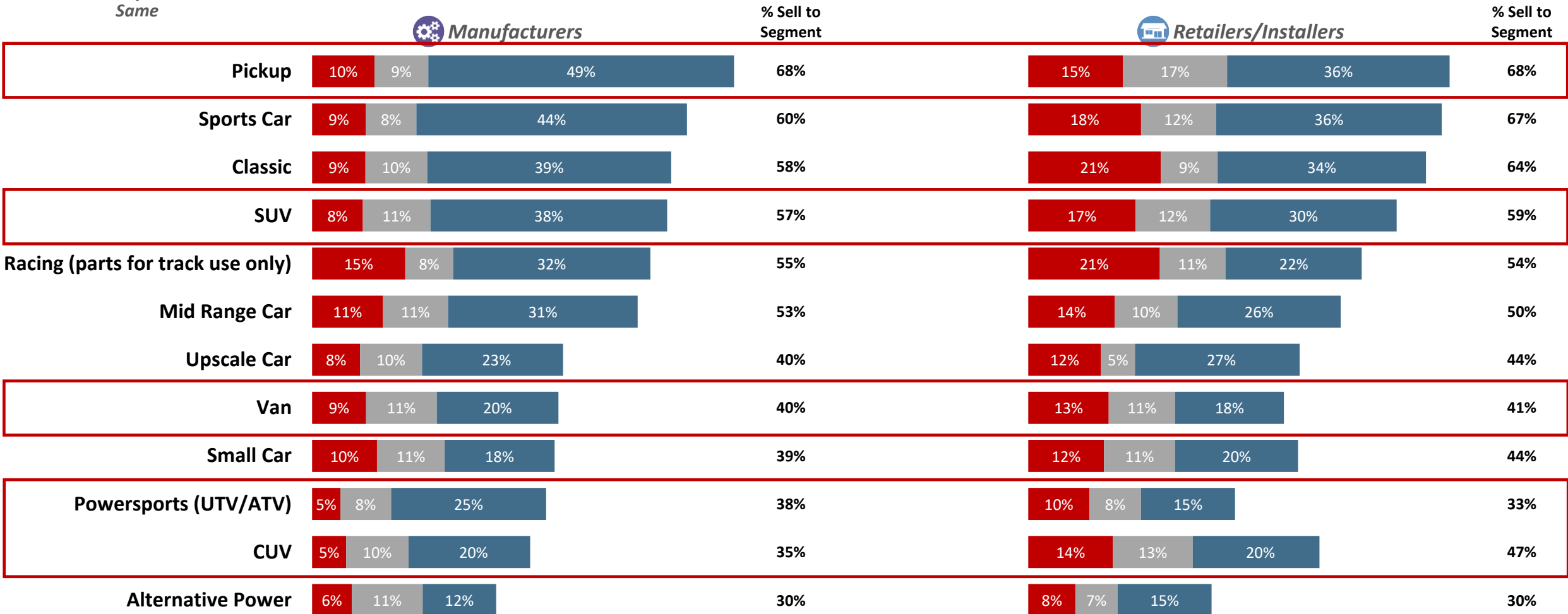
The size of the circle represents the share of specialty-equipment retail dollar.

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 DRIVE THE MOST SALES FOR THE SPECIALTY-EQUIPMENT INDUSTRY

Changes in Vehicle Segment Sales Over Past 12 Months

● Decreased  
● Stayed Same  
● Increased



# LIGHT TRUCKS NEED PARTS FOR A VARIETY OF USE CASES

Vehicle Usage for Light Trucks Modified in 2019

Vehicle Use	Total Light Truck	Pickup	SUV	CUV	Van
Running Errands	76%	73%	74%	81%	77%
Commuting	66%	63%	66%	73%	60%
Pleasure Driving	62%	58%	69%	62%	58%
Work Use	52%	61%	47%	44%	45%
Off-Road	21%	30%	26%	9%	7%
Collector Vehicle	6%	6%	8%	6%	5%
Track Days	5%	4%	5%	5%	3%
Car Shows	4%	4%	6%	4%	2%
Dedicated Racing Vehicle	4%	3%	4%	6%	2%
Non-Operational	1%	2%	2%	0%	1%

Note: Excludes pre-1974 vehicles. Classic vehicles are more likely to be collector or show vehicles, and less likely to be daily drivers

Light trucks are used for a range of purposes, but the majority of modified light trucks are workhorse vehicles—daily drivers in addition to a host of other activities. CUVs are particularly likely to be family vehicles, while pickups are notably more often used as work vehicles.

A sizeable number of modified pickups and SUVs are used for off-roading, and this connection with off-road and outdoor culture heavily informs the types of specialty products purchased for these vehicles. Even if a Jeep Wrangler is never taken off-road, it's a good bet that it's been modified with parts that at least make it look like an off-roader. And for many pickup accessorizers, a lift kit and a set of off-road tires are must-have options.

But light truck owners also want more functional and aesthetic upgrades—side steps, bed and cargo area protection, exterior accessories, lighting, winches, hitches, and even creature comforts. And there are some who want make their truck stand out at shows or compete in races. Light trucks get used for a wide variety of activities, and the specialty aftermarket is there to help them excel at whatever they do.

# TRUCKS OFFERING THE BIGGEST OPPORTUNITY?

Fullsize 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. Pickups will likely continue to be the core of the segment as new small and midsize models, plus the Jeep Gladiator enter the market.

Jeep Wranglers are also a popular platforms for enthusiasts, especially those that go off-roading. They are among the most accessorized vehicles on the road today. However, a lot fewer Wranglers are sold than the fullsize pickup models. Further opportunities exist in the SUV category for the industry, notably with the Tahoe/Yukon and the 4Runner, and the upcoming re-launch of the Ford Bronco is already generating considerable interest

CUVs have traditionally been more mass-market than enthusiast vehicles, but a few models have been noticed by the community. As OEMs continue to introduce new models and position them as go-anywhere vehicles, it remains to be seen which will have a sustained impact on the specialty-automotive aftermarket.

*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 Light Trucks for Accessorization

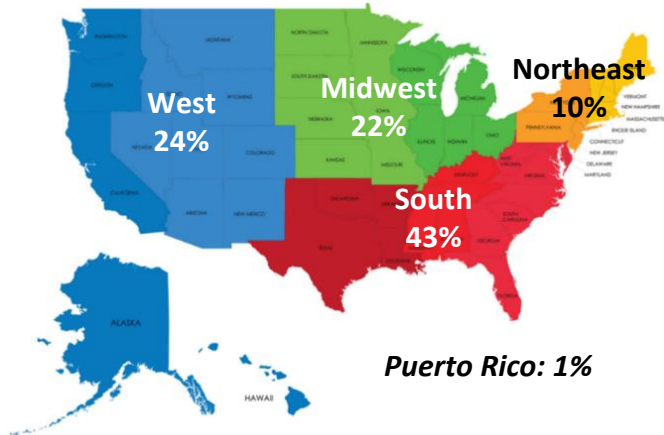
Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021–2028)
GM Full-Size Pickup*	18.1M	30%	6.6M
Ford F-Series	16.1M	30%	6.7M
Ram Pickup	8.2M	29%	4.9M
Jeep Wrangler	3.2M	39%	1.6M
Chevrolet Tahoe / GMC Yukon	4.0M	28%	1.4M
Toyota 4Runner	2.0M	33%	1.2M
Toyota Tacoma	3.5M	25%	2.3M
Jeep Grand Cherokee	3.3M	22%	1.8M
Ford Explorer*	3.9M	19%	2.4M
Toyota Tundra	2.1M	28%	1.0M

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

# PICKUPS



# PICKUPS IN THE UNITED STATES

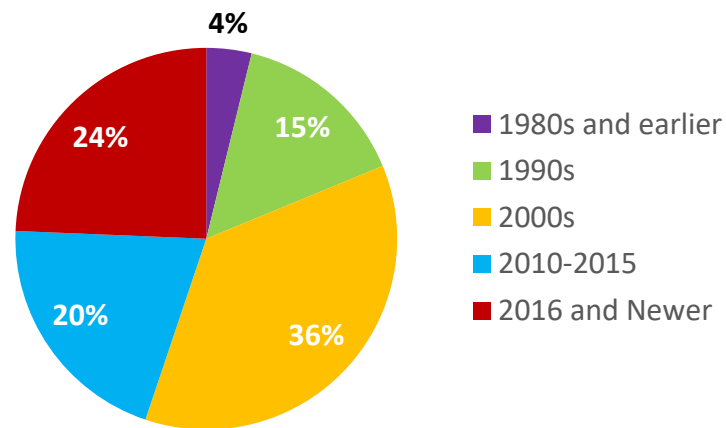


**57.6 Million Registered in the United States**  
*20% of all vehicles on the road*

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

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

## Vehicle Age



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

# THE RETURN OF SMALLER PICKUPS

**New Pickup Sales From 1970–2020**  
Calendar Year

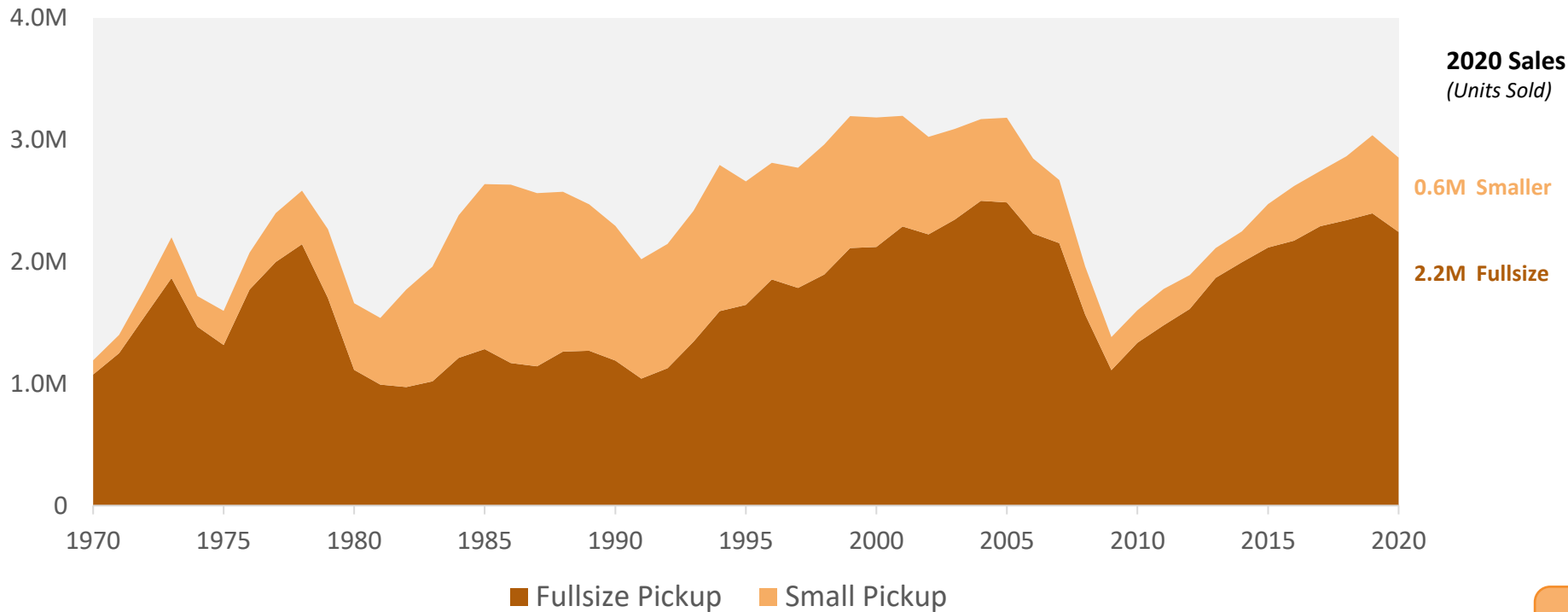
**48%** of pickups sold in 1990 were smaller pickups



**11%** of pickups sold in 2014 were smaller pickups



**21%** of pickups sold in 2020 were smaller pickups



Smaller pickups, like the Chevrolet Colorado, Ford Ranger, or Toyota Tacoma, became popular in the 1980s. But over the 1990s and 2000s, there was a big shift towards larger fullsize trucks, and some of the “smaller” pickups grew in size until they were nearly half-ton trucks themselves.

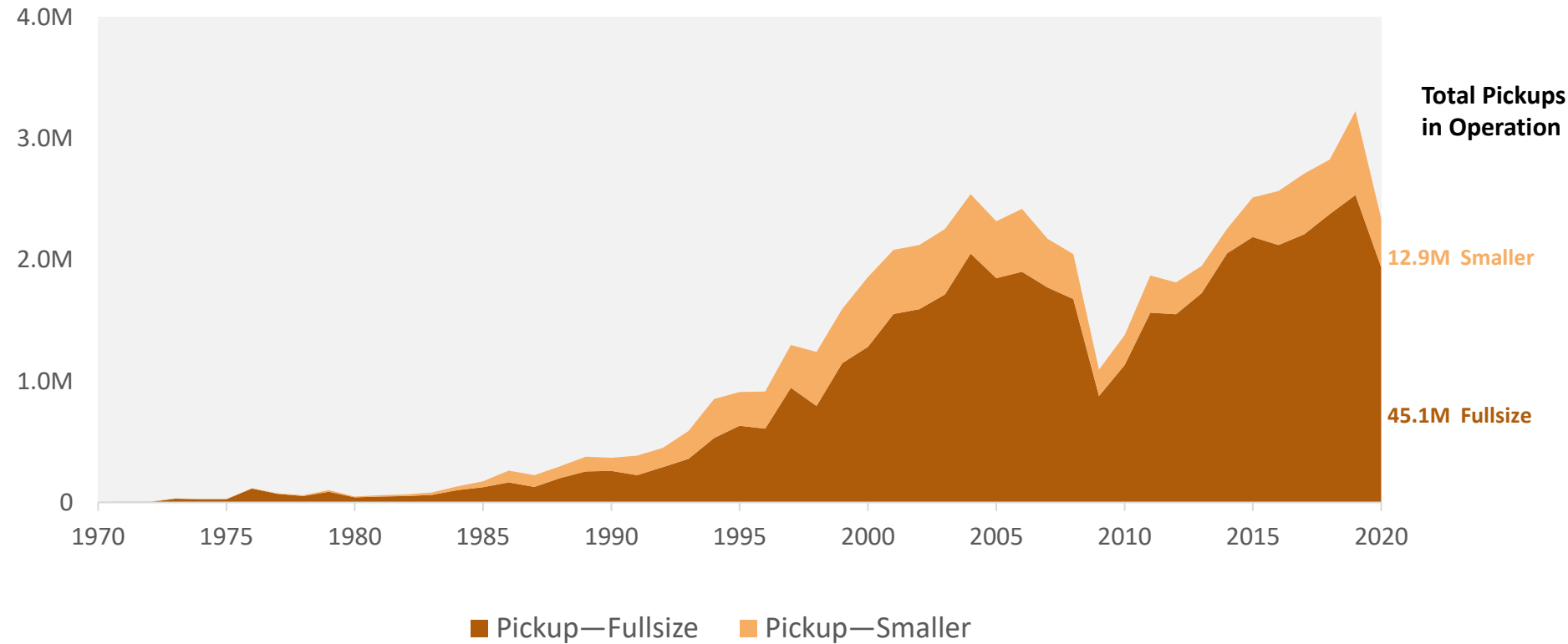
In addition, pickups have become more loaded with features and options, driving up the retail price. The resurgence of midsize trucks, and introduction of new small models like the Ford Maverick, may indicate that OEMs are seeing the need to add smaller, cheaper, and more efficient options back into their lineup.

As these smaller pickups regain popularity, businesses have a growing opportunity to provide accessories and modifications for these new vehicles.

For more information on vehicle sales and population, head to [www.sema.org/vio](http://www.sema.org/vio)

# CURRENT PICKUP POPULATION

Current Population of Pickups  
*Model Year*



**Total Pickups  
in Operation**

The bulk of pickups on the road are fullsize trucks, particularly Ford, Chevrolet, and RAM model lines.

Pickups tend to be kept in service longer than other vehicle segments, and enjoy robust aftermarket support for both repair and modification.

Note that data on older trucks is harder to obtain; it is likely the numbers shown for pre-1990 trucks are conservative. However, the population certainly skews strongly toward newer models.

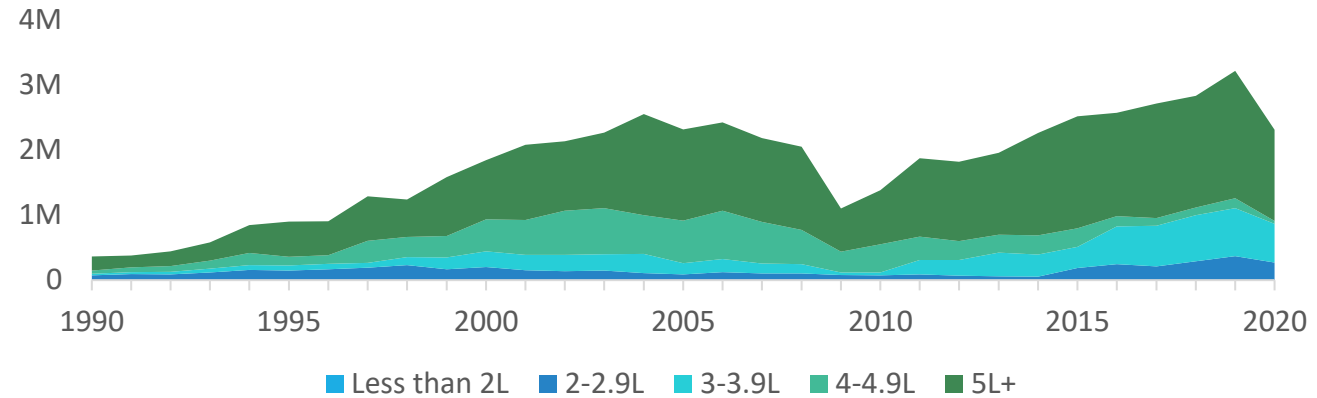
For more information on vehicle sales and population, head to [www.sema.org/vio](http://www.sema.org/vio)

# PICKUP POWERTRAINS

While less pronounced in pickups than in other truck segments, recent years have seen a shift towards smaller, more efficient engines as OEMs work to bring down the emissions of their vehicle lineup. Plenty of pickups carry 5L or bigger V8s, but we're also seeing smaller V6s, like Ford's EcoBoost line, starting to gain in popularity. The resurgence in midsize trucks is also contributing to the growing share of smaller engines.

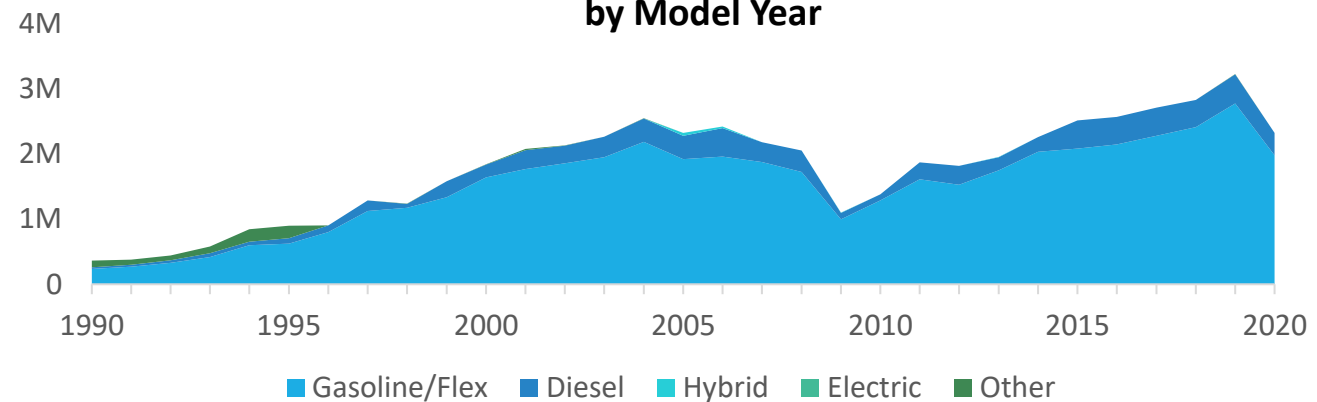
The overwhelming majority of pickups continue to be gasoline-powered. Diesel has long been a significant niche within the pickup segment for those who want extra power for towing or hauling. And while electric trucks are just starting to show up, they may add further diversity to the pickup vehicle mix. While electric pickups provide the first real test of the attraction of alt power to enthusiasts, gasoline will continue to dominate the pickup market.

### Engine Displacement Profile of Current Pickups by Model Year



Overall Share	
5L+	58%
4-4.9L	18%
3-3.9L	13%
2-2.9L	9%
<2L	<1%

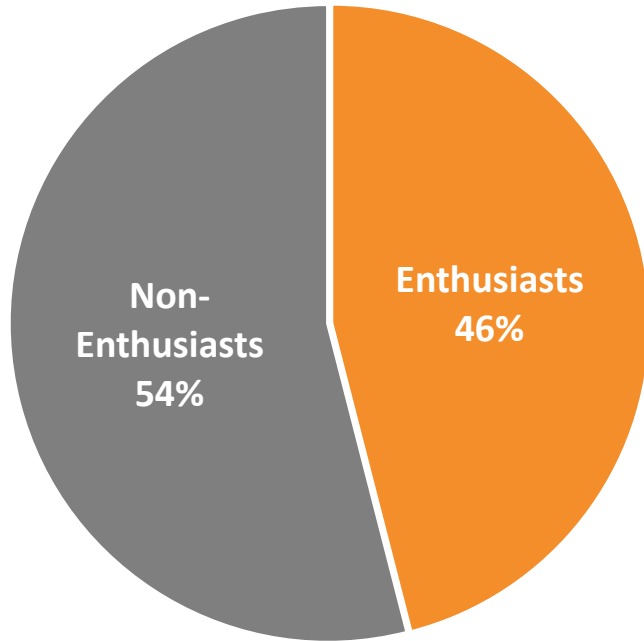
### Powertrain Breakdown of Current Pickups by Model Year



Overall Share	
Gasoline/Flex	84%
Diesel	13%
Hybrid	<1%
Electric	0%
Other	2%

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.

# 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 Bedliners and Other Bed Accessories

Suspension Products

Fender, Hood and Body Upgrades

# WHAT ARE THE HOTTEST PICKUPS FOR OUR INDUSTRY?

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

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, particularly the half-ton F-150 and Silverado 1500 models. The Ram pickup has also proven to be extremely popular.

But smaller pickups, especially the Tacoma, are also opportunity centers for the industry. And the Jeep Gladiator, despite only launching last year in 2020, is already making waves in the enthusiast community. As sales of midsize trucks like the Tacoma, Gladiator, or Honda Ridgeline grow, and potentially even smaller models like the upcoming Ford Maverick debut, their importance to the industry is likely to increase.

More Than

70

Pickup models currently on the road

20+

Pickup models projected to be sold from 2021–2028

## SEMA Hot Pickups for Accessorization

Vehicle Make/Model (All Model Years)	Vehicles in Operation	Accessorization Rate	Projected Sales (2021–2028)
GM Fullsize 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 Midsize 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.

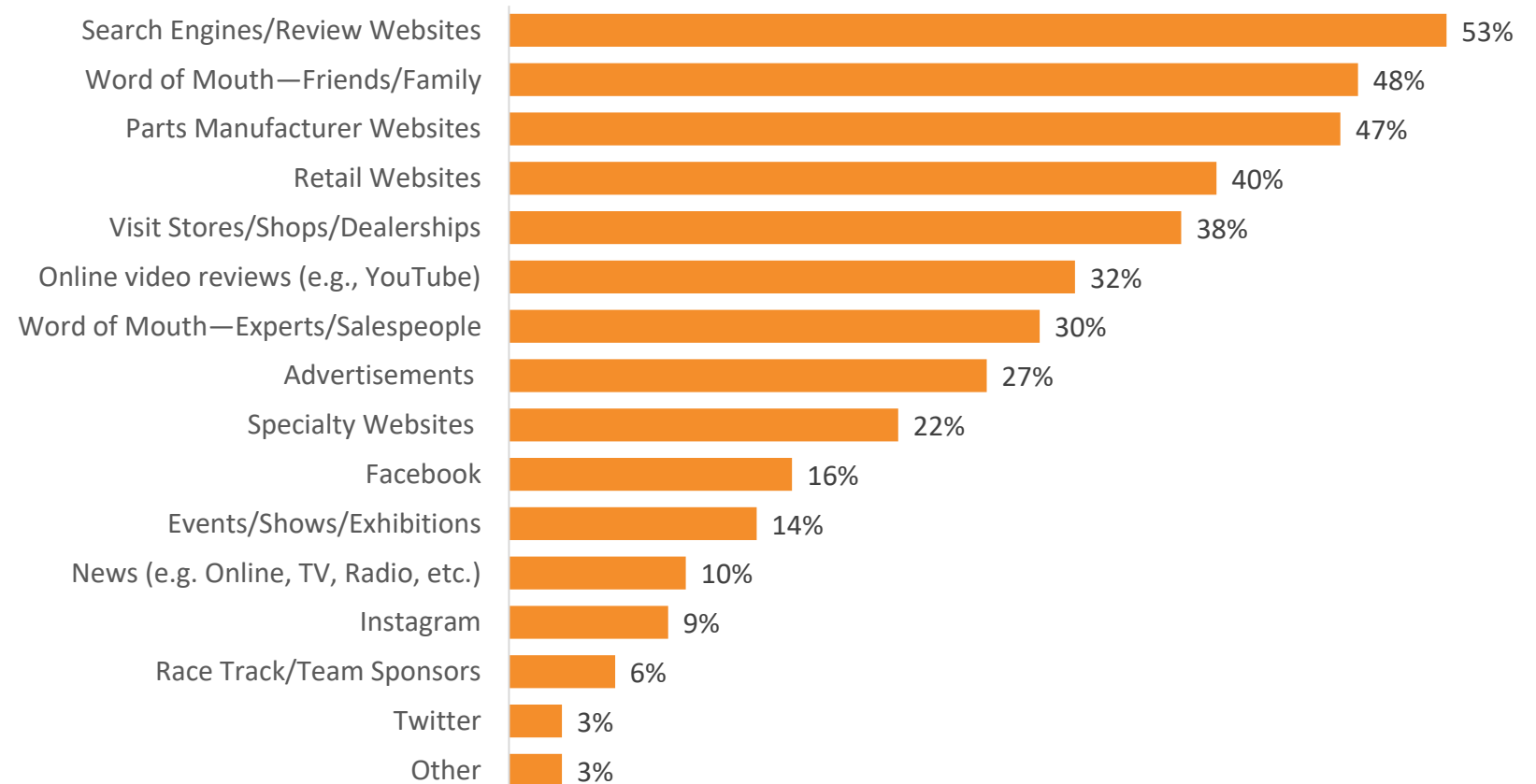
# WHERE PICKUP ACCESSORIZERS RESEARCH PARTS

When looking for parts to install on their pickup, accessorizers often turn to the internet for information and ideas. Many go direct to the source as well, seeing what they can find from manufacturers. Companies who make and/or sell parts for pickups may want to ensure they have robust data on their products available for customers to review in order to make an informed decision.

But browsing the web is far from the only way pickup accessorizers research parts. In-store visits are also an important source of information, particularly for bigger-ticket items or for pickup owners who prefer to see products up close before they buy.

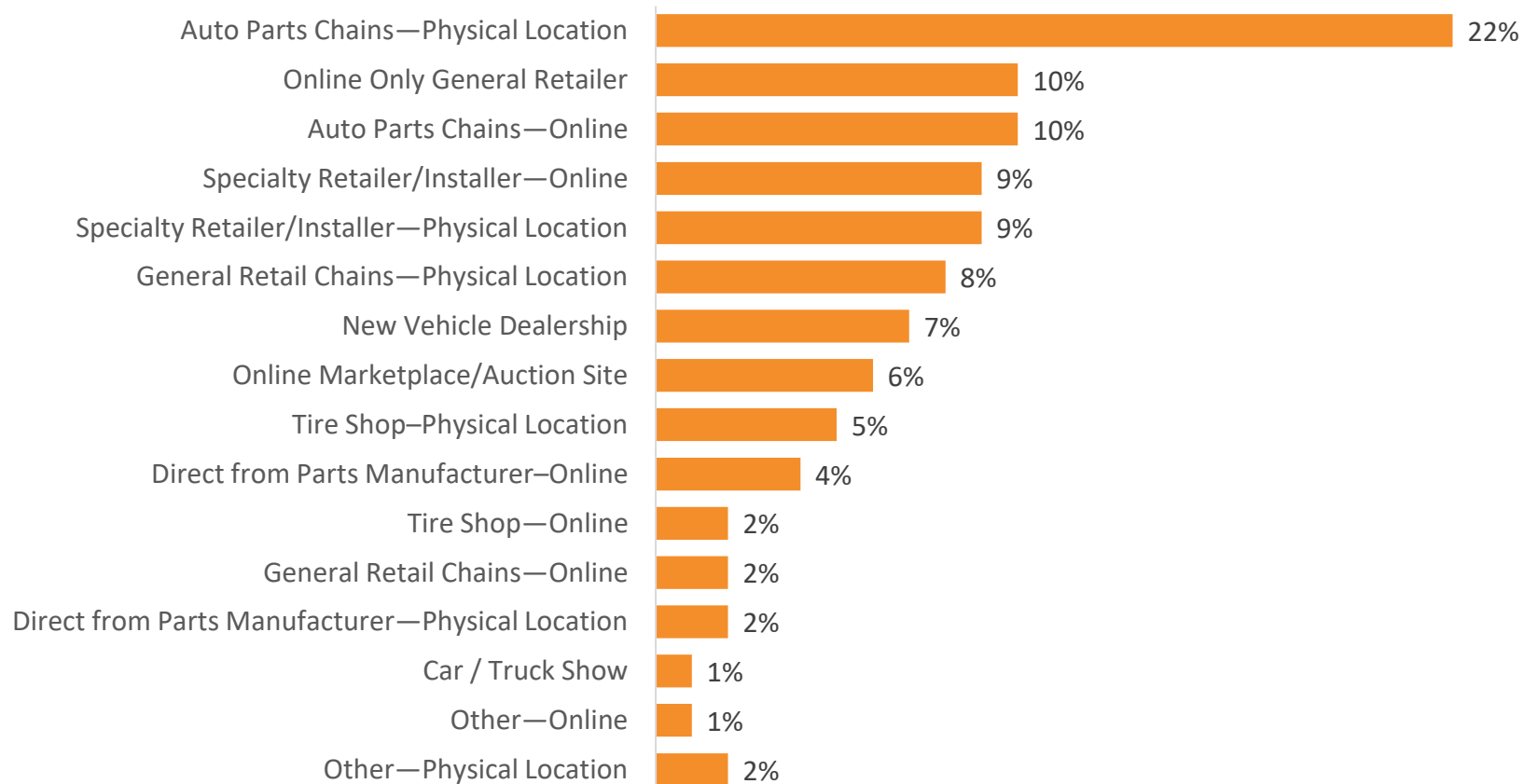
Finally, word-of-mouth advice and recommendations can have an impact on product choice. Advice from people in pickup accessorizers' personal network, and from trusted professionals, can also help shape what they ultimately choose to buy.

## Sources of Information for Parts and Ideas



# WHERE PICKUP ACCESSORIZERS BUY PARTS

**Distribution of 2019 Retail Sales by Channel**  
*Share of Dollars*



Parts chains, being a prevalent and often convenient option, are a big sales channel for pickup accessories and upgrades, along with online general retailers like Amazon.

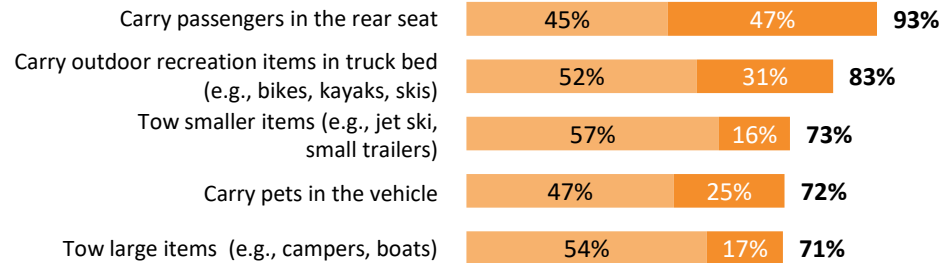
However, independent retailers are also important for the pickup specialty aftermarket. While they may not be able to match the selection or price of bigger retailers, they can make up for it with focused expertise and product offerings tailored to specific niches.

The reality is that pickup accessorizers use a variety of channels when buying parts, depending on where they can find what they're looking for and how they prefer to do business.

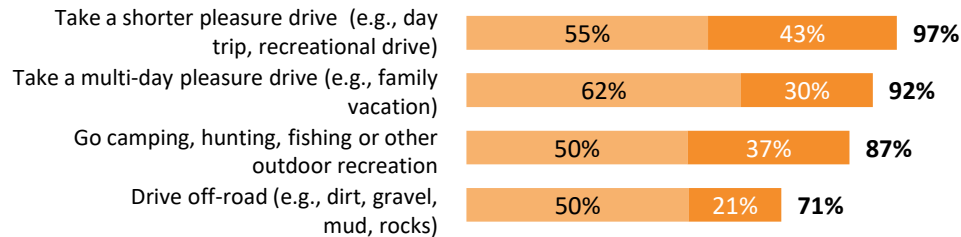
# WHAT PICKUP ACCESSORIZERS DO WITH THEIR TRUCK

## How Accessorizers Use Their Pickup

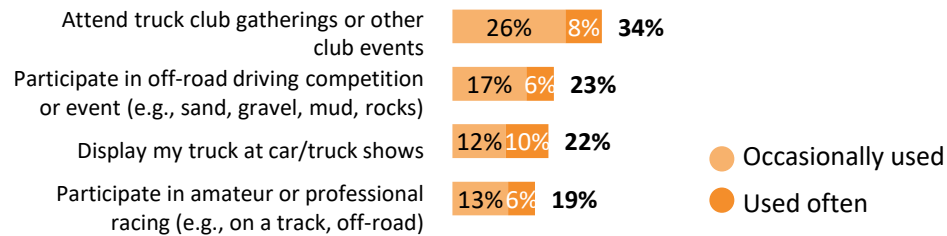
### Towing and Hauling



### Recreational Activities

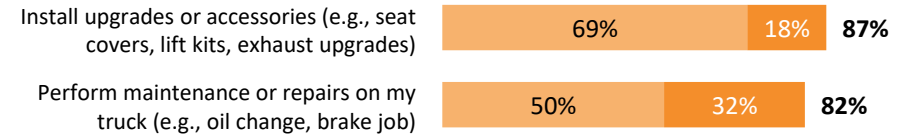


### Racing and Club Activities

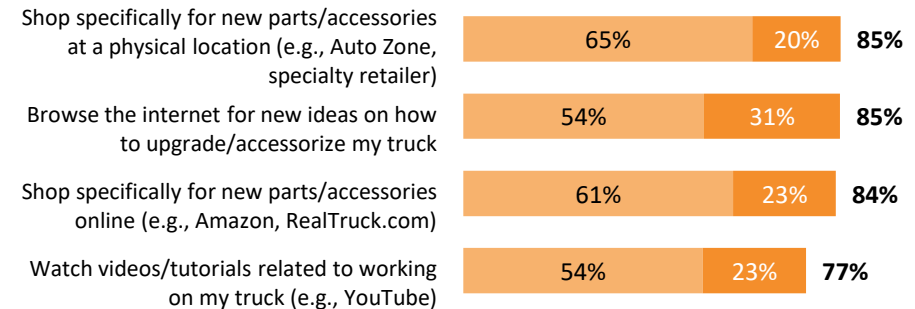


● Occasionally used  
● Used often

### Working on Truck



### Research and Shopping



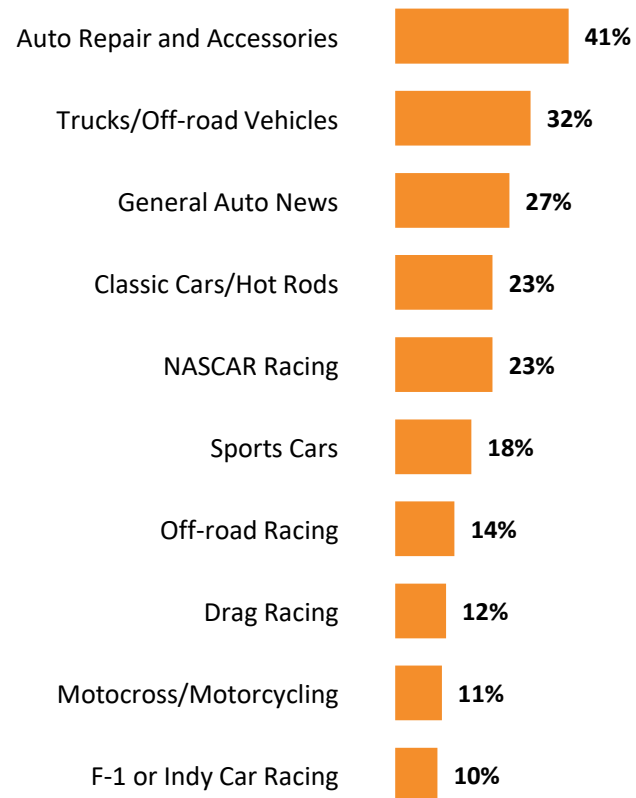
Modified pickups are often used to get away from it all—taking road trips, going off-road, traveling to outdoor recreation activities like hunting or camping, or towing/hauling recreational equipment. Pickup accessorizers also regularly spend time either working on their truck, or looking for ways to further improve the vehicle.

# PICKUP ACCESSORIZER INTERESTS

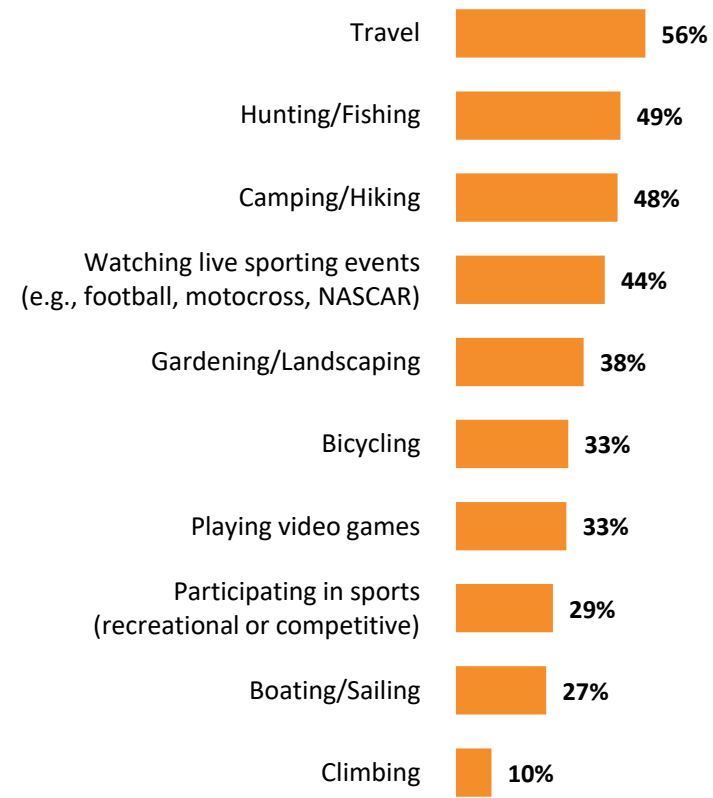
Pickup accessorizers are often deeply engaged in the automotive space, particularly with regard to accessories and modifications for trucks, but some are also actively into racing.

Pickups are very much synonymous with the outdoors, and people who modify them frequently go hunting, camping, fishing, or hiking, regardless of whether it's their truck they use to bring themselves and their gear.

## Automotive Topics of Interest



## Pickup Accessorizer Hobbies



# AMERICAN FULL-SIZE PICKUPS ARE KING



Ford

## Ford F-Series



GM

## GM Fullsize 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)

# POPULAR MIDSIZE PICKUPS



Toyota

## Toyota Tacoma



GM

## GM Midsize Pickups



Ford

## Ford Ranger

Vehicles-in-Operation

3.5M

2.6M

2.5M

Accessorization Rate

25%

20%

15%

Projected Sales

2.3M (2021–2028)

1.2M (2021–2028)

780K (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

### Ranger

MY 2024: Redesign

MY 2026: Hybrid and Plug-In Hybrid 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.

# NEW AND UPCOMING PICKUPS



**Jeep Gladiator**



**Hyundai Santa Cruz**

**Unavailable**

**Ford Maverick**

**Vehicles-in-Operation**

113K

**Expected Release**

Jun 2021

Mid to Late 2021

**Accessorization Rate**

\*\*

**Expected Starting Price**

\$25,000\*

\$25,000-\$27,000\*

**Projected Sales**

588K (2021-2028)

Both Hyundai and Ford have confirmed that they are producing new pickups that are smaller even than current midsize offerings for the 2022 model year. Ford has not officially announced the Maverick yet, but it has already garnered plenty of interest from the automotive industry and press.

**Redesign Schedule and Model Rumors**

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

As of this report's writing, Ford has not yet released photos of the 2022 Maverick. But, spy shots seem to indicate a similar look and feel to the Ford Ranger, albeit on a smaller scale.

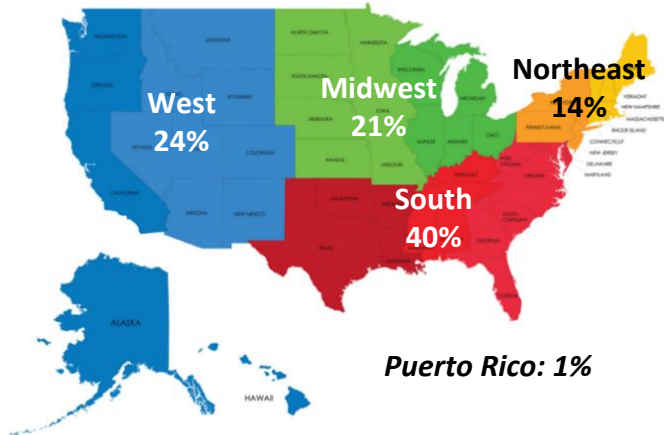
\*\*Accessorization data limited on new Jeep Gladiator.

\*MSRPs have not been officially announced, but industry estimates place the price for these unibody trucks below those of current midsize pickups.

# SUVS



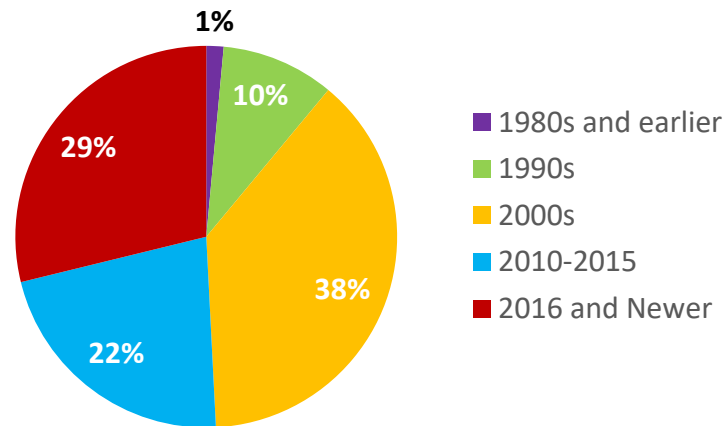
# SUVs IN THE UNITED STATES



**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

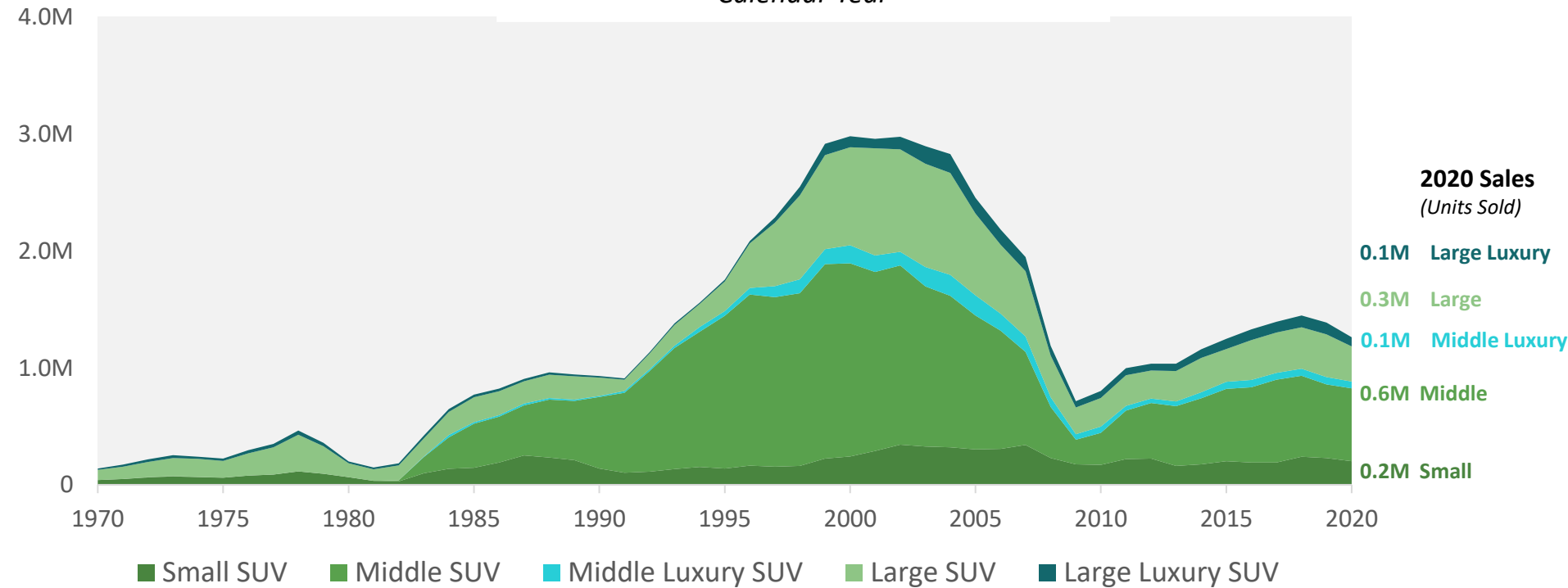


Top Registered SUV Models	
Chevrolet Tahoe/GMC Yukon	4.0M
Ford Explorer*	3.9M
Jeep Grand Cherokee	3.3M
Jeep Wrangler	3.2M
Toyota 4Runner	2.0M
Ford Expedition/Lincoln Navigator	1.8M
Jeep Cherokee	1.8M
Chevrolet/GMC Suburban	1.6M
Kia Sorento	1.2M
Dodge Durango/Chrysler Aspen	1.2M

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

# SUVs PEAKED IN THE 1990S AND 2000S

New SUV Sales From 1970–2020  
Calendar Year



SUVs became immensely popular in the mid-1990s through the mid-2000s, but have been less prominent after the 2007–2009 financial crisis. Still, they represent an important and dynamic piece of the light-truck market.

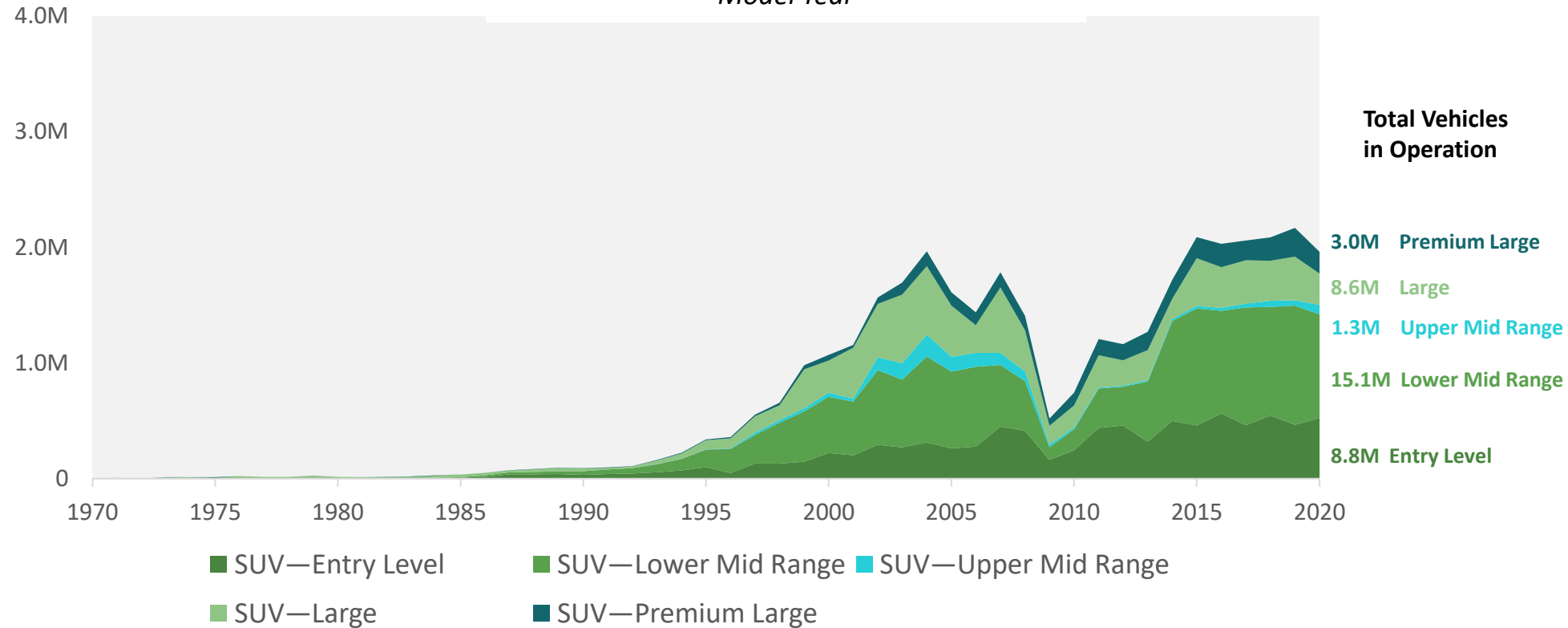
Midsized SUVs like the Chevrolet Blazer, Ford Explorer, or Toyota 4Runner have traditionally been the biggest subsegment in terms of sales, and that has held true even after the mid-2000s recession.

The small SUV category, meanwhile, has largely been the domain of the Jeep Wrangler for some time. But the upcoming Ford Bronco may bring some competition there, along with new opportunities for the specialty aftermarket.

For more information on vehicle sales and population, head to [www.sema.org/vio](http://www.sema.org/vio)

# CHEAPER SUVs ARE MORE POPULAR

**Current Population of SUVs**  
*Model Year*



Lower-priced entry- and lower-mid SUV models traditionally provide the bulk of new sales. These lower-end models are the most common SUVs on the road. This makes for a great opportunity for the aftermarket to fill the gaps on vehicles that don't come fully equipped.

But premium and large SUVs have seen their sales expand recently. As more new vehicle buyers have moved to premium models, the SUV market has shifted to additional higher-end offerings.

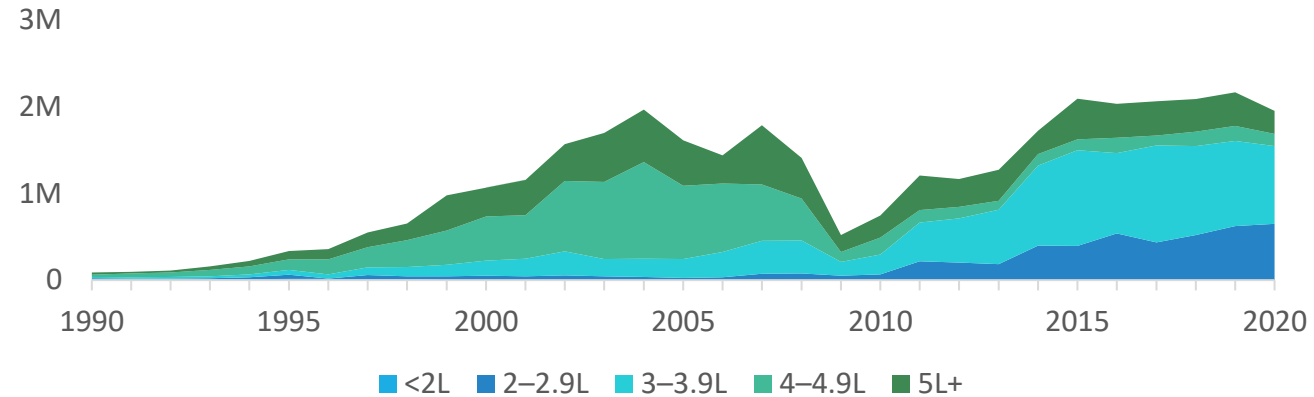
# SUV PROFILE AND FUTURE SALES

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.

The trend towards smaller engines is pronounced in the SUV market—while most SUVs sold prior to 2010 carried 4L or bigger engines, since then sub-4L engines have grown to dominate the SUV market. SUVs had a notorious reputation as gas-guzzlers during their heyday, and OEMs have worked to counter this by making their powertrains more efficient.

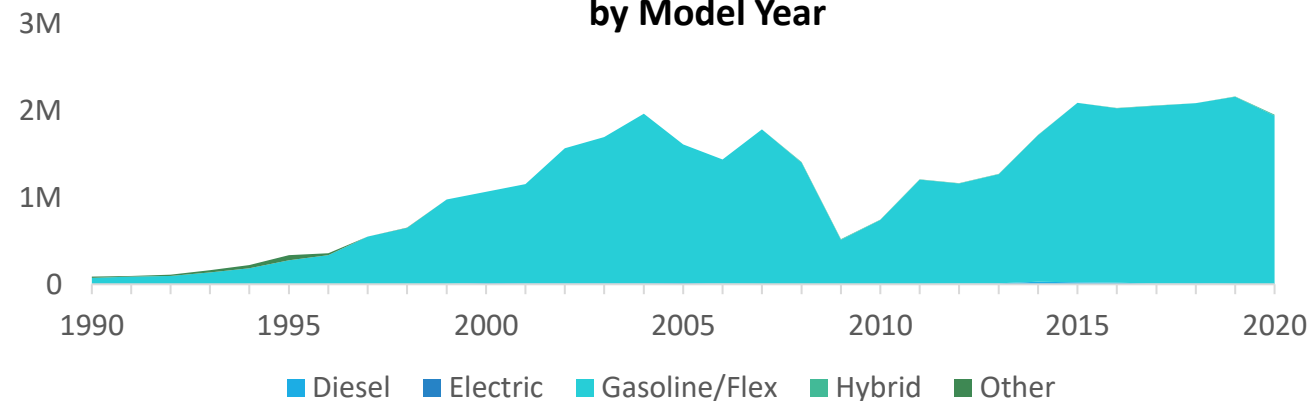
Many of the SUV models projected to sell well over the next decade are also versatile off-roaders—which often attracts enthusiasts. The Jeep Wrangler continues to be popular among new-car buyers and the specialty aftermarket. The upcoming Ford Bronco is expected to do extremely well among consumers as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

**Engine Displacement Profile of Current SUVs by Model Year**



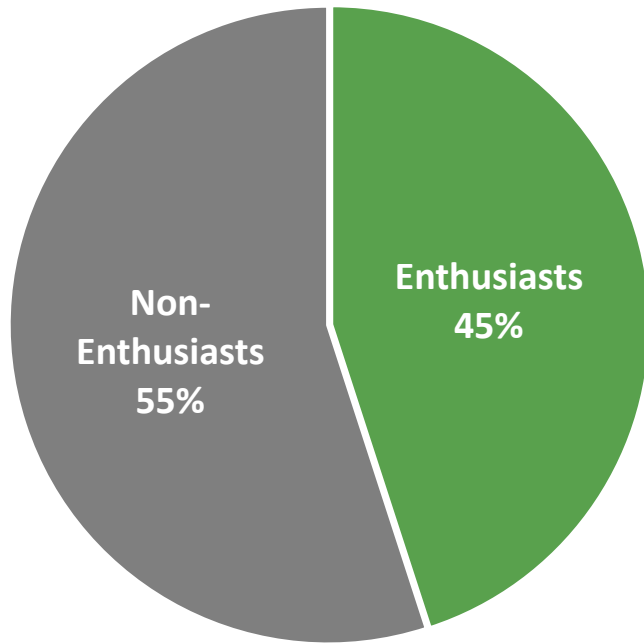
Overall Share	
5L+	26%
4-4.9L	27%
3-3.9L	32%
2-2.9L	14%
<2L	<1%

**Powertrain Breakdown of Current SUVs by Model Year**



Overall Share	
Gasoline/Flex	98%
Diesel	1%
Hybrid	<1%
Electric	0%
Other	1%

# 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

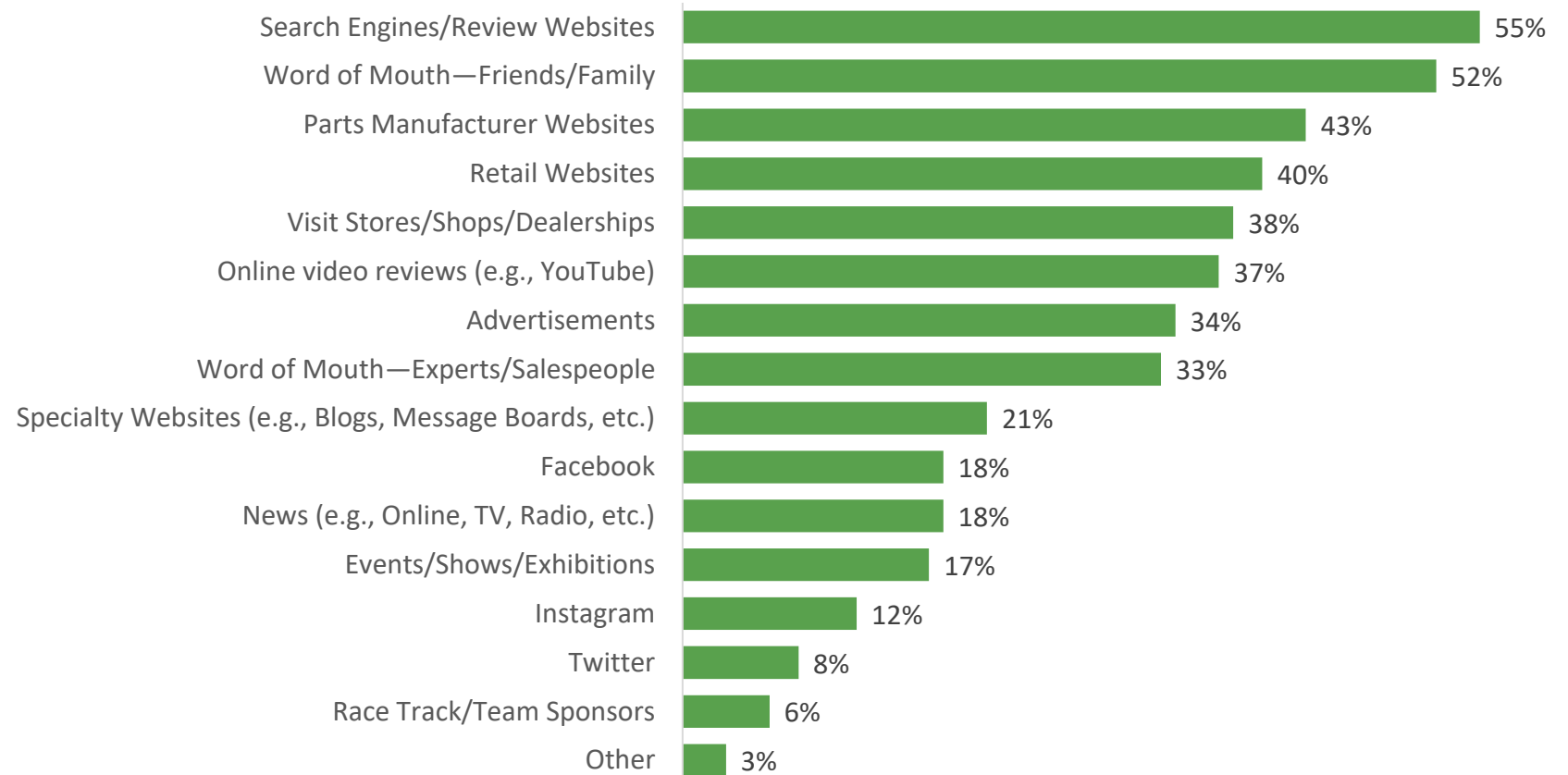
# HOW SUV ACCESSORIZERS RESEARCH PARTS

When looking for parts to install on their pickup, accessorizers often turn to the internet for information and ideas. Many go direct to the source as well, seeing what they can find from manufacturers. Companies who make and/or sell parts for pickups may want to ensure they have robust data on their products available for customers to review in order to make an informed decision.

But browsing the web is far from the only way pickup accessorizers research parts. In-store visits are also an important source of information, particularly for bigger-ticket items or for pickup owners who prefer to see products up close before they buy.

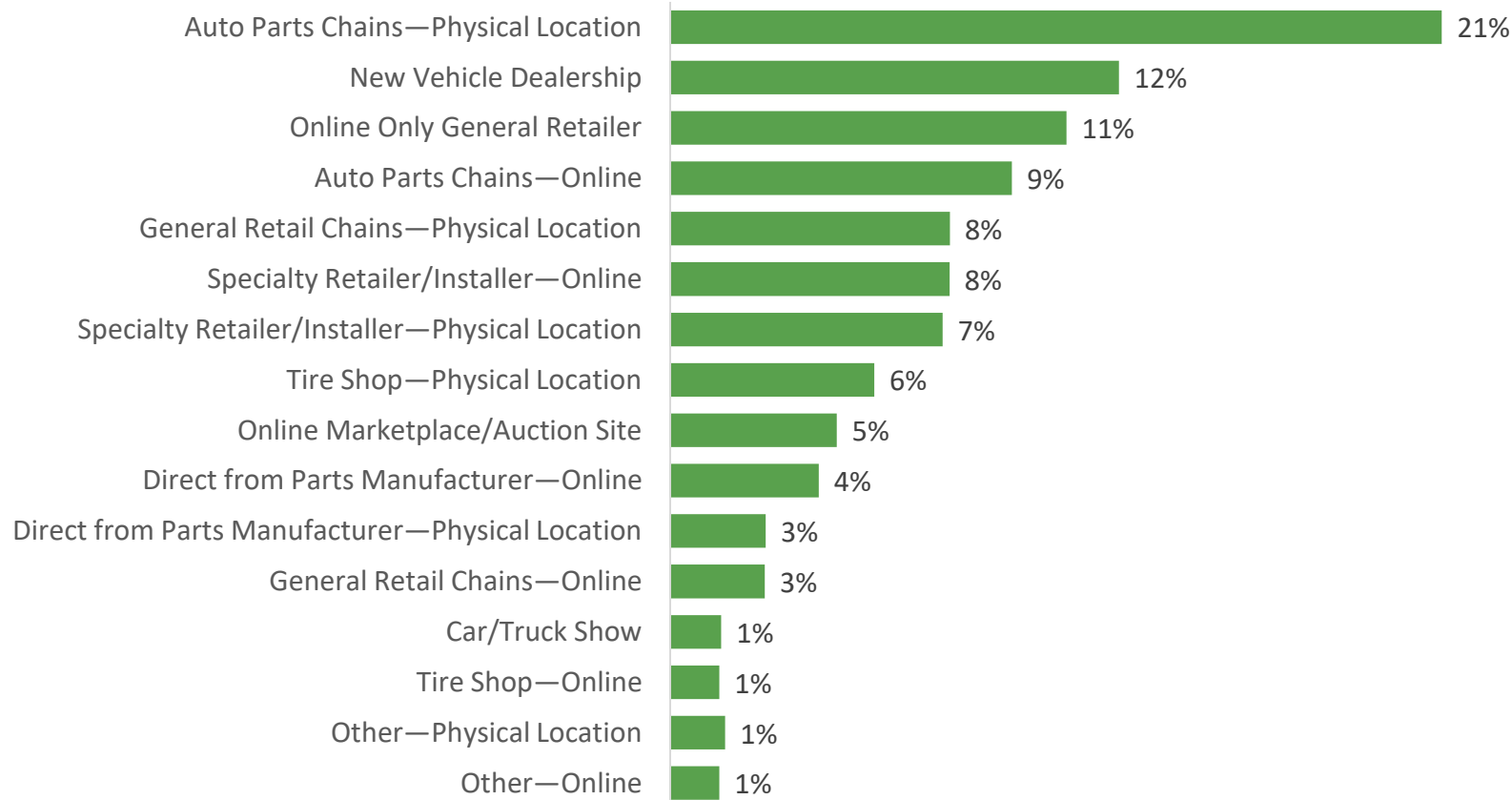
Finally, word-of-mouth advice and recommendations can have an impact on product choice. Advice from people in pickup accessorizers' personal network, and from trusted professionals, can also help shape what they ultimately choose to buy.

## Sources of Information for Parts and Ideas



# HOW SUV ACCESSORIZERS SHOP FOR PARTS

**Distribution of 2019 Retail Sales by Channel**  
*Share of Dollars*



Auto parts chains, particularly in-store purchases, account for the biggest slice of the specialty aftermarket for SUVs, along with dealerships and online general retailers like Amazon.

However, specialty retail is still important to the SUV market, particularly for models favored by enthusiasts or off-roaders. More functional accessories are likely easy to find at the big chains, and even more specialized parts may be offered at a competitive price at large online retailers, but for trickier jobs there's something to be said for going to a specialist.

# WHAT ARE THE HOTTEST SUVs FOR OUR INDUSTRY?

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

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. This includes other top sellers like the Jeep Compass or Kia Sorento.

More Than

90

SUV models currently on the road

30+

SUV models projected to be sold from 2021-2028

## SEMA Hot SUVs for Accessorization

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.

# JEEP WRANGLERS ARE HIGHLY MODIFIED SUVS

**62%**

of TJ and JK Jeep Wranglers have aftermarket parts installed



**71%**

of all purchased parts are installed by Jeep owners



**40%** Change parts around for specific activities.

Most commonly, this includes the removal or addition of top and door, and changing wheels/tires. Off-roaders are most likely to exhibit this behavior.



**67%** Have their Jeep lifted.

4 in. is the most common lift size.

Off-roaders are much more likely to run a lift.



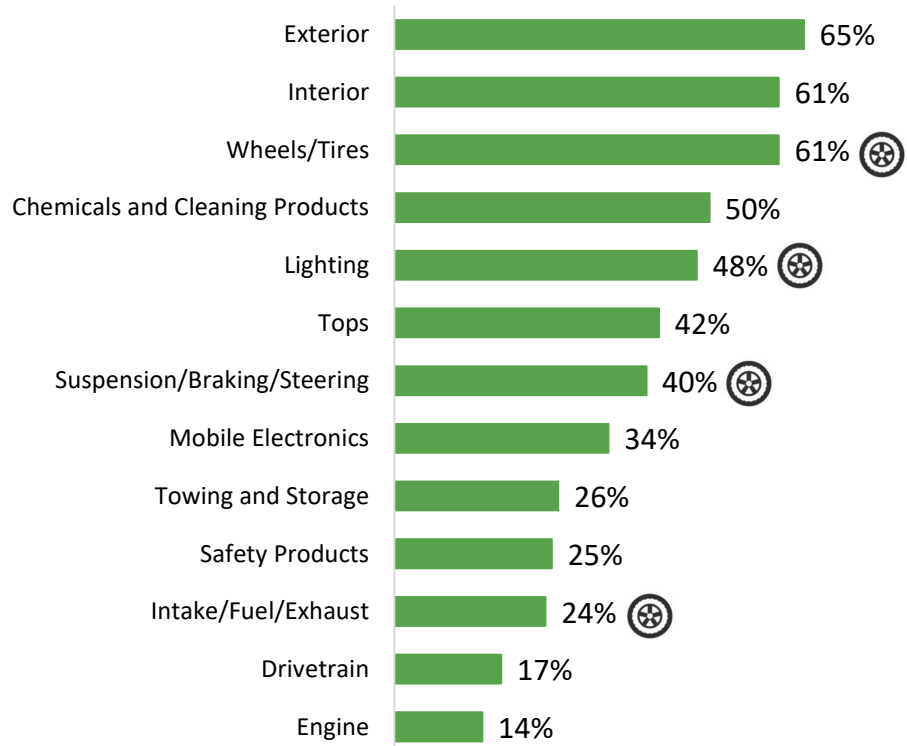
**25%**

Have spent more than \$5,000 on their Jeeps.

*For more information on how TJ and JK Wranglers are used and modified by their owners, download the "SEMA Jeep Wrangler Report at [www.sema.org/research](http://www.sema.org/research)."*

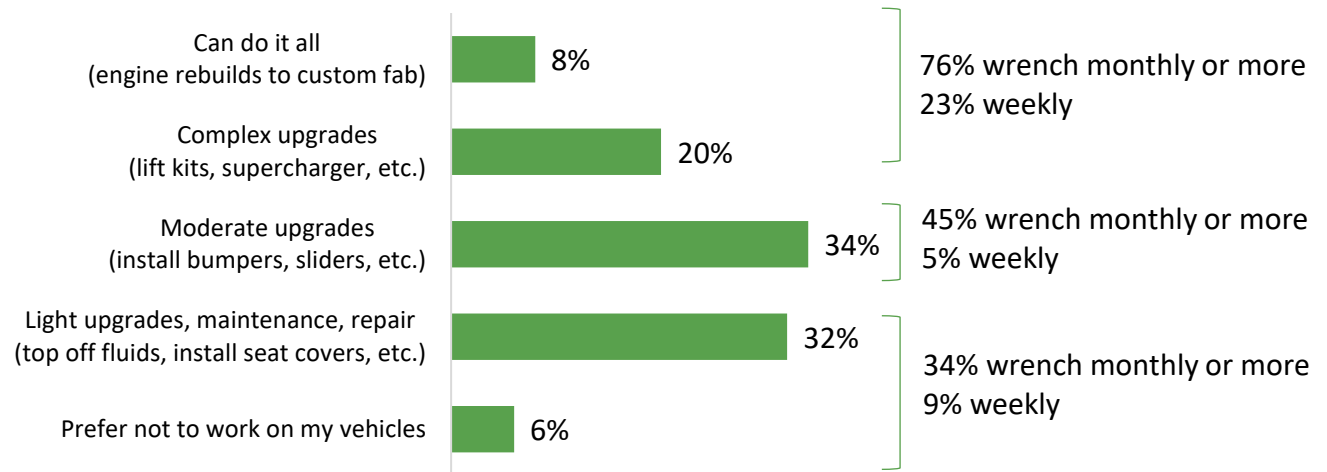
# HOW WRANGLER OWNERS MODIFY THEIR VEHICLE

## Percent of Accessorizers Purchasing Parts/Accessories by Category



= Off-roaders are more likely buy these types of parts

## Mechanical Ability



Many Wrangler accessorizers aren't shy about getting their hands dirty. Most are comfortable doing at least some of the work on their Jeep themselves, and half of folks with modified wranglers are in the garage working on it at least once a month.

It's also worth noting that many Wranglers get upgraded with off-road parts regardless of whether or not they actually leave the street. However, owners who do take their Jeep off-roading are more likely to buy parts that functionally improve its ability to handle rough terrain as well as look the part.

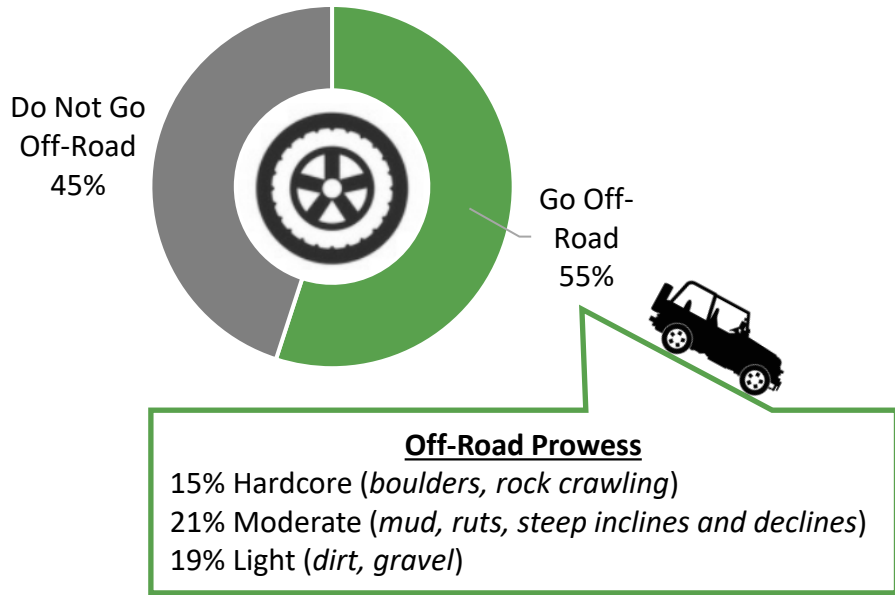


**50%**

Wrench on their Jeep monthly or more often overall;  
11% wrench weekly

# WRANGLER MODIFIERS LIKE TO GET OUT

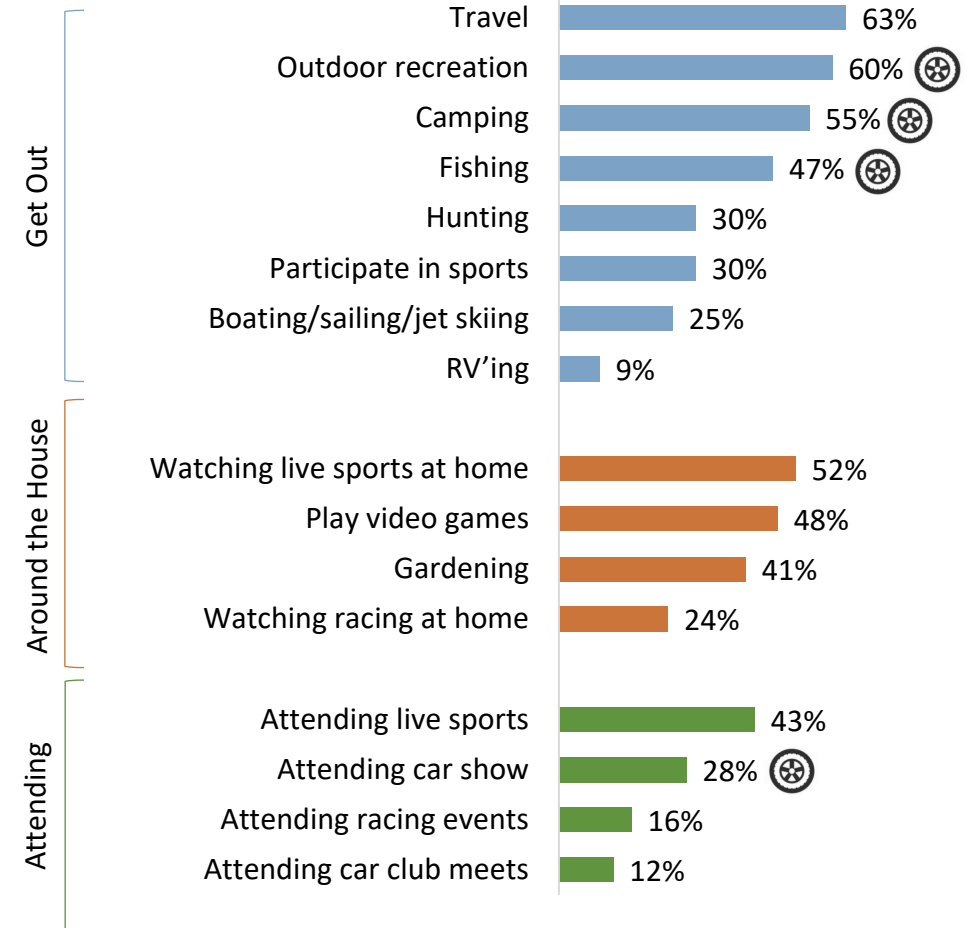
## Off-Roading



## General Activities



⊗ = Off-roaders are more likely to report participating in this activity



A little over half of Wrangler accessorizers take their modded Jeep off-road. Off-roaders are particularly likely to also be fond of outdoor recreation activities or be engaged in the automotive scene.

But, like off-road parts, the outdoor lifestyle is heavily ingrained in Jeep Wrangler culture. Even those who don't take their Jeep off-road are still often outdoor recreation enthusiasts.

# 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.

# WILL THE FORD BRONCO MAKE WAVES?



**Ford Bronco**

## Price

Starting at \$28,500 (Two-Door)  
and \$33,200 (Four-Door)

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## Release Date

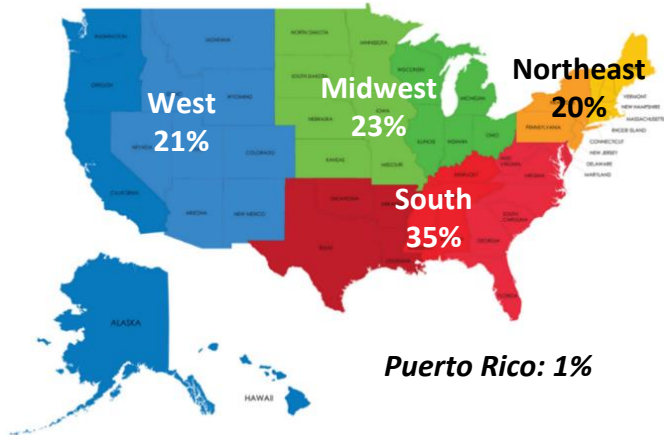
Summer 2021

A reborn classic, the Ford Bronco was originally introduced in 1965 as a two-door SUV and sold up until 1996 before being discontinued in favor of the Expedition. Now, after COVID-19-related production delays, the Bronco is coming back. While later-model Broncos were more akin to fullsize SUVs like the Blazer or Ramcharger, the 2021 Bronco is clearly a return to its roots as a midsize, off-road-focused vehicle. In truth, Ford is positioning the reintroduced Bronco as a direct competitor to the off-road titan Jeep Wrangler, offering both two-door and four-door versions and designing it to be highly customizable.

# CUVS



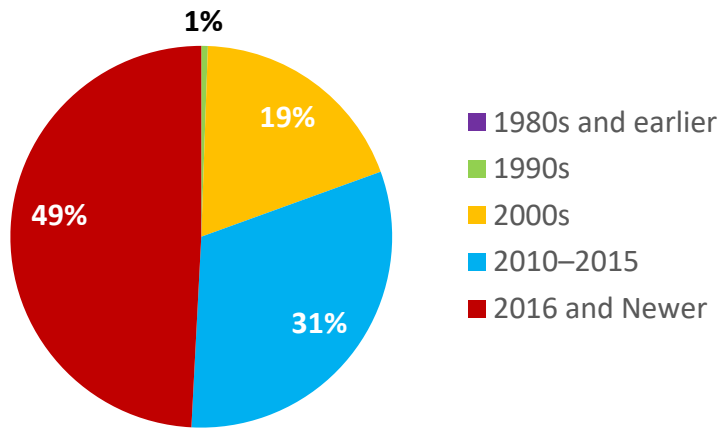
# CUVs IN THE UNITED STATES



**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

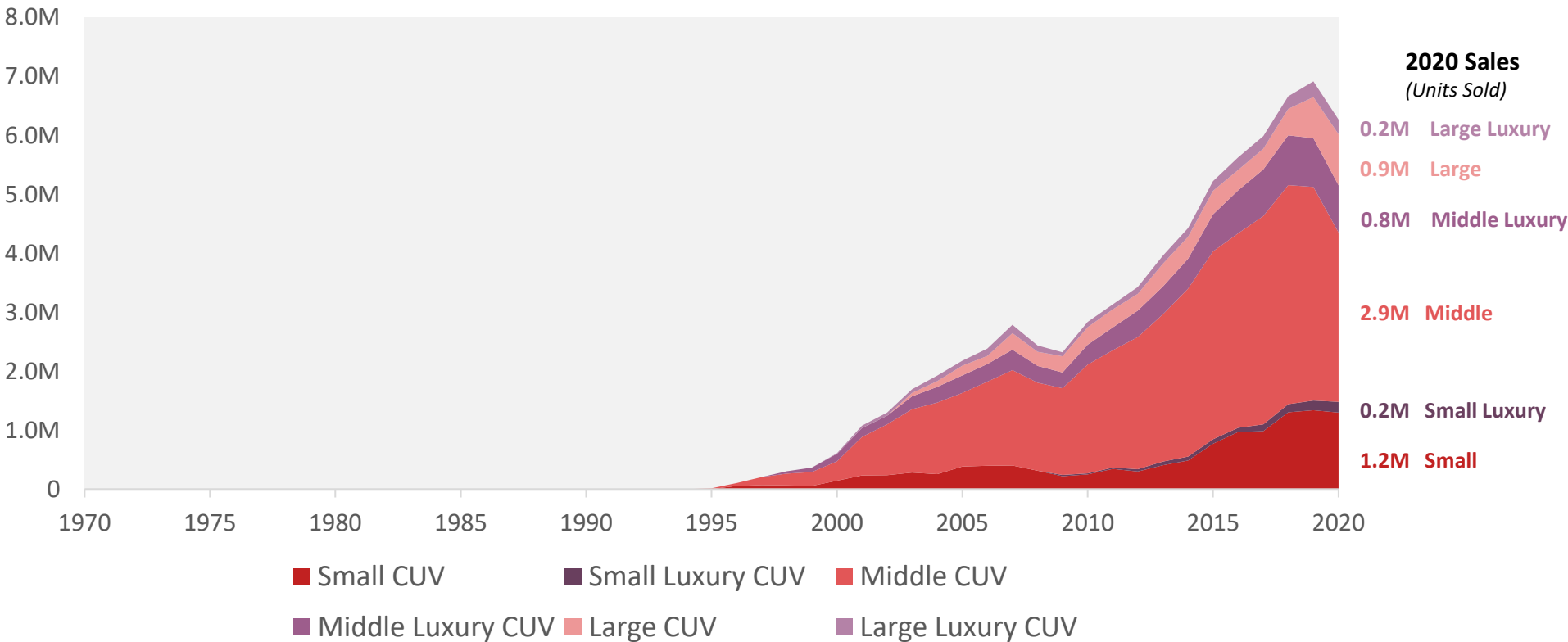


Top Registered CUV Models	
Honda CR-V	4.7M
Toyota RAV4	4.0M
Ford Escape*	4.0M
Chevrolet Traverse*	3.1M
Chevrolet Equinox	3.0M
Nissan Rogue	2.7M
Toyota Highlander	2.5M
Honda Pilot	2.0M
Subaru Forester	1.9M
Ford Edge	1.6M

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

# CUVs ARE A DIVERSE SEGMENT

**New CUV Sales from 1970-2020**  
Calendar Year



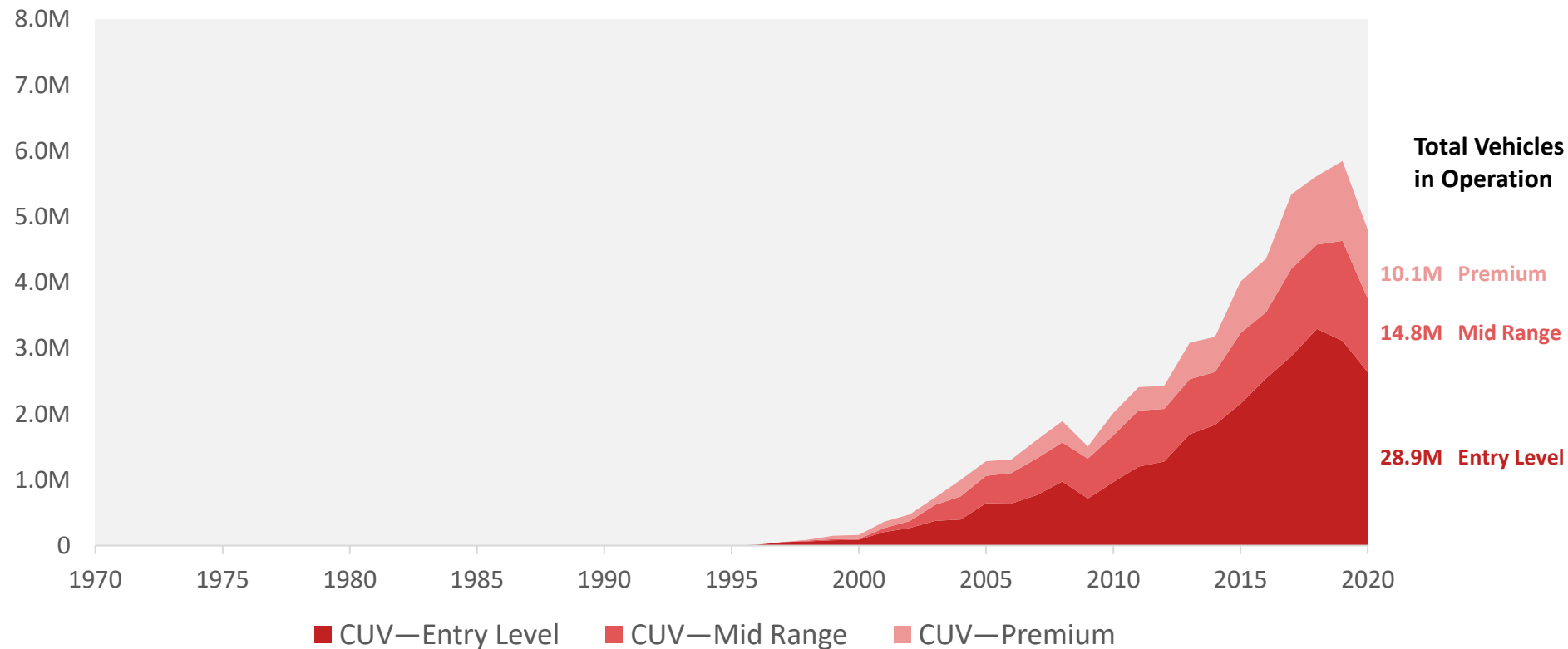
CUVs are a relatively new vehicle segment, with the first vehicle classified as such only hitting the road in 1995. Since then, however, the segment has exploded, with a wide range of models that are collectively the single biggest segment of light trucks, and indeed the light vehicle population overall.

As with SUVs, midsize CUVs are the most popular in terms of sales, striking a balance between utility and practicality for the most part. Smaller models have also gained traction in recent years, outpacing the large and luxury segments to become the second-biggest slice of the CUV market.

For more information on vehicle sales and population, head to [www.sema.org/vio](http://www.sema.org/vio)

# ENTRY-LEVEL MODELS ARE MOST POPULAR

Current Population of CUVs  
Model Year



The majority of the CUVs on the market today are more affordable entry-level models. As sales of traditional cars have eroded, these less expensive CUVs have become the go-to first new car in the market.

While the market emerged around the entry-level models, premium platforms have come to the CUV segment as well. There are now more than 130 CUV models that cover all price points for consumers to choose from.

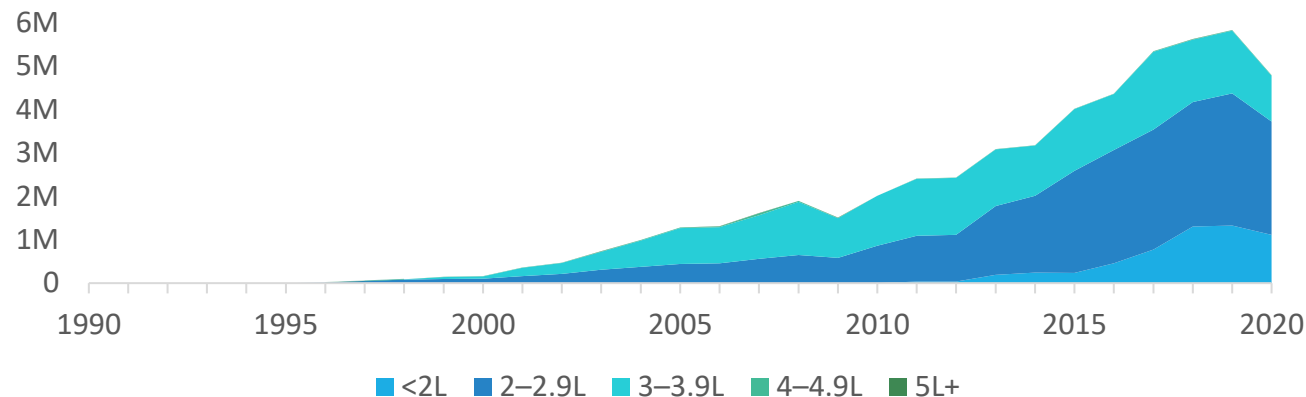
For more information on vehicle sales and population, head to [www.sema.org/vio](http://www.sema.org/vio)

# CUV PROFILE AND FUTURE SALES

As with other trucks, CUVs have shown a pronounced shift towards smaller engines over the past 15 years. While most early CUVs still on the road are equipped with 3–3.9L engines, newer models favor engines in the 2–2.9L range, and sub-2L models have also been hitting the streets since 2015.

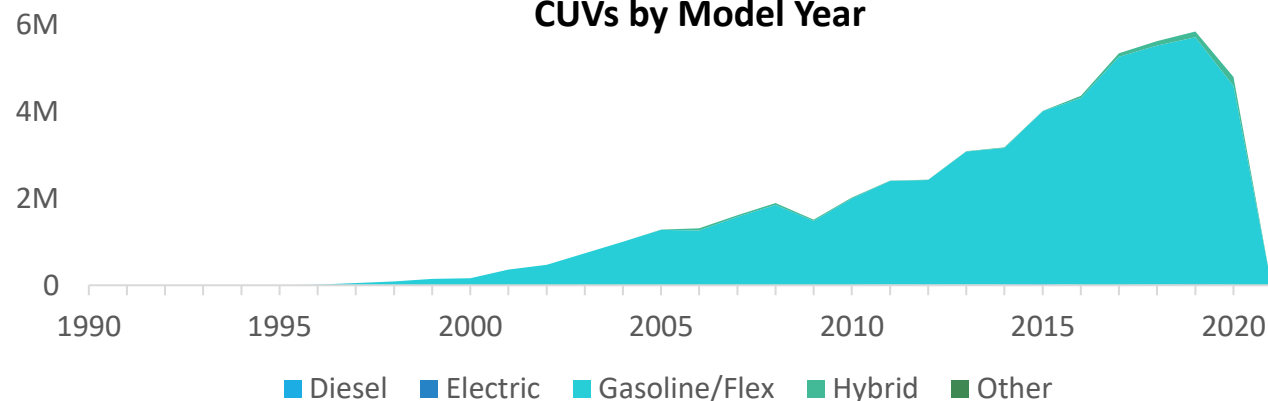
Like other trucks, the overwhelming majority of CUVs are gasoline-powered. However, alternative fuels seem to be gaining traction here more quickly than in other truck segments. Hybrid and electric powertrains are still a slim minority of the overall CUV fleet. But we can expect the share of alternative fuel types to grow more rapidly in this segment than in other light trucks.

### Engine Displacement Profile of Current CUVs by Model Year



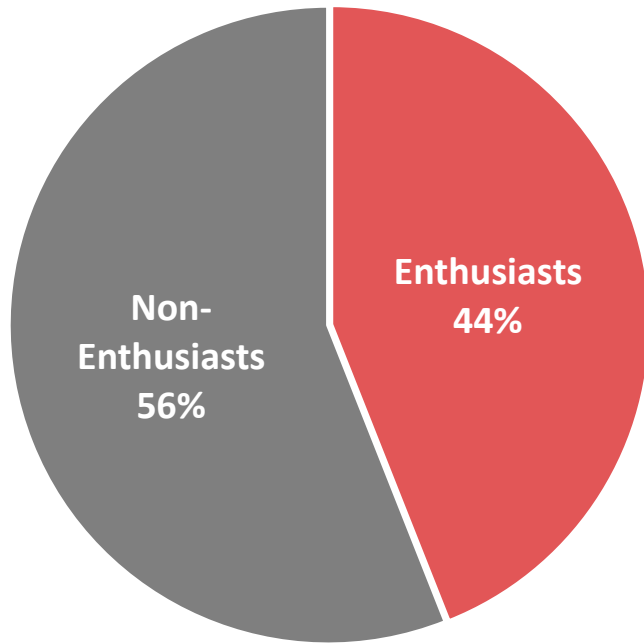
Overall Share	
5L+	<1%
4–4.9L	<1%
3–3.9L	39%
2–2.9L	50%
<2L	11%

### Powertrain Breakdown of Current CUVs by Model Year



Overall Share	
Gasoline/Flex	98%
Diesel	<1%
Hybrid	2%
Electric	<1%
Other	0%

# CUV ACCESSORIZATIONS 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 more than 130 models on the road, and more than 170 models projected to be sold from 2021-2028. In addition to the models shown here, we can expect top sellers to include Subarus—several of which are getting an off-road-inspired Wilderness trim package later in 2021—along with the Nissan Rogue, Chevrolet, equinox, and Toyota Highlander.

Unlike pickups, where its clear which models are key, CUVs are extremely diverse and varied. This diversity makes it challenging for our industry to find the platforms that will offer a solid return when developing new products.

Given their appeal to a broad general 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.

Will CUV owners treat them like cars or trucks? That is a big question for the industry going forward.

**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.”*

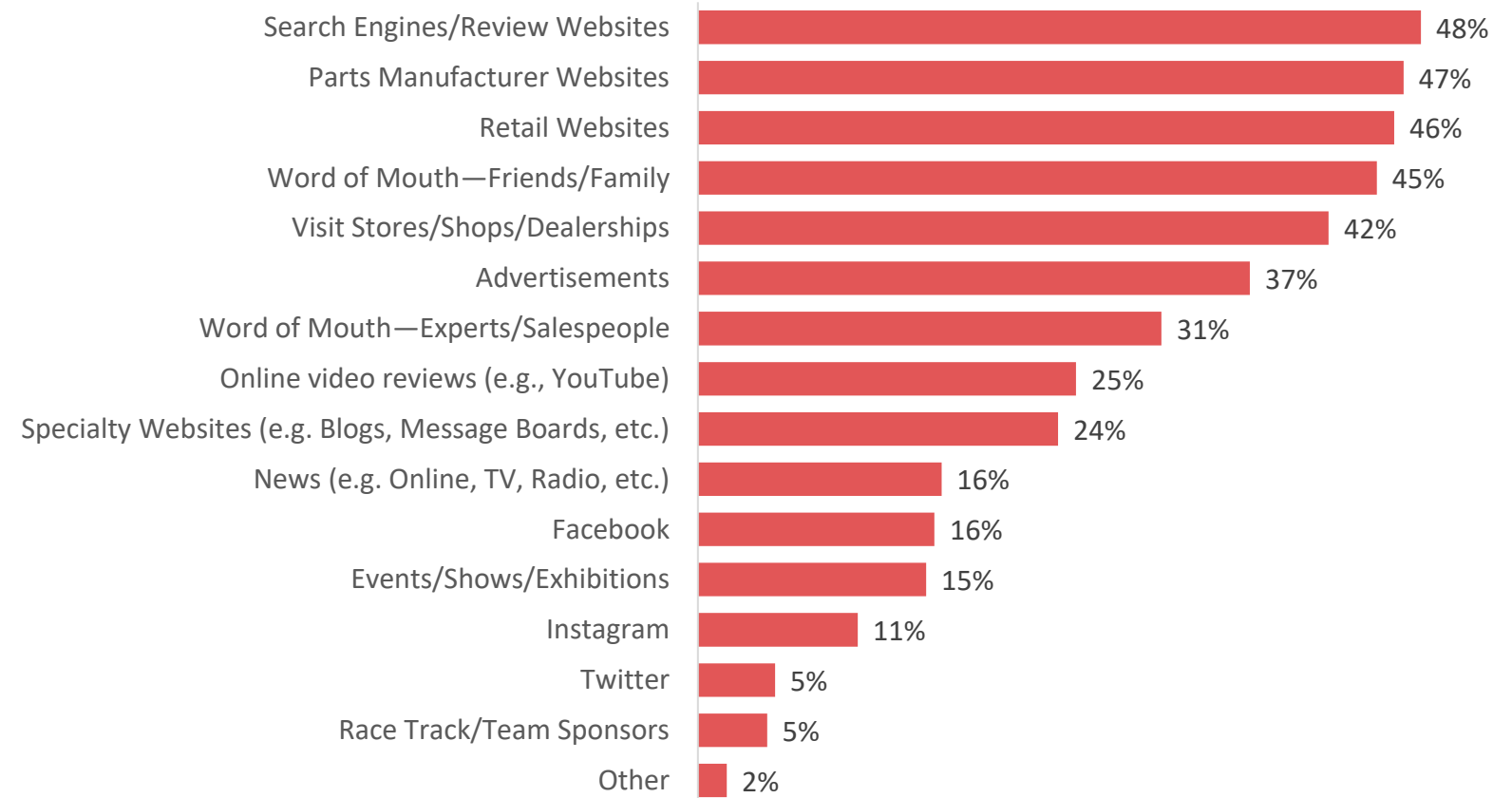
# HOW CUV ACCESSORIZERS RESEARCH PARTS

Like many other accessorizers, CUV owners often rely on the internet to help them research parts and ideas on how to modify their vehicle. Search engines and their personal network are about as important for them as with other light trucks. Video reviews and specialty websites are also useful for those who may be more engaged in the automotive scene.

But CUV accessorizers also look to professionals for information and expertise. They want to see the parts and product information, and a good number also directly consult experts and sales professionals for advice and recommendations.

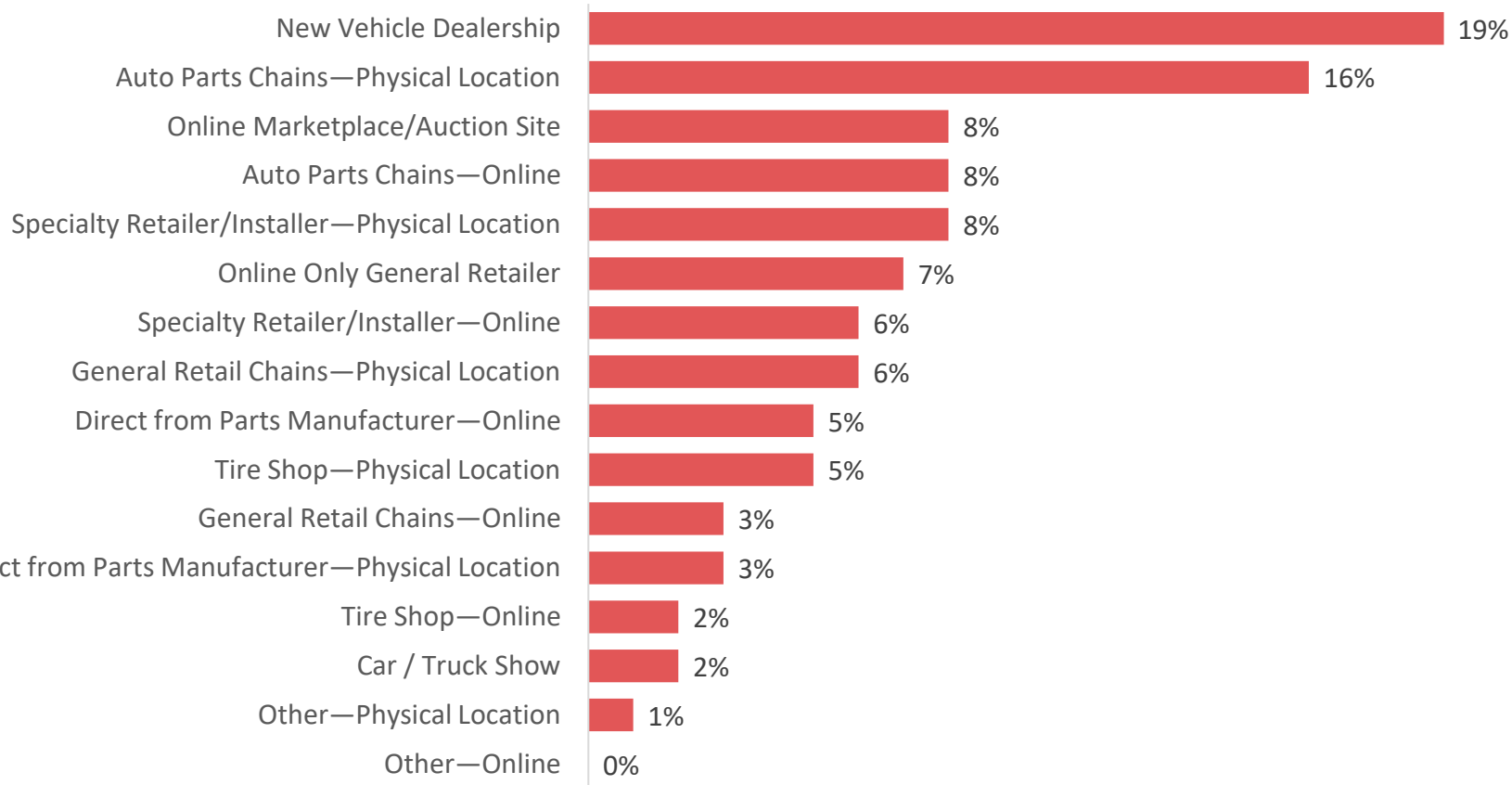
Specialty-equipment businesses looking to sell into the CUV segment can help set themselves up for success by making sure they have a strong web presence with detailed product information, and knowledgeable sales and support staff ready to assist their customers.

## Sources of Information for Parts and Ideas



# HOW CUV ACCESSORIZERS BUY PARTS

**Distribution of 2019 Retail Sales by Channel**  
*Share of Dollars*



CUV accessorizers are a little more reliant on dealerships than other truck segments when it comes to purchasing vehicle upgrades and accessories, which may indicate they are underserved by the specialty aftermarket. Still, like other light trucks, specialty CUV parts are sourced from a broad range of channels—including independent retailers.

What remains to be seen is how auto enthusiasts and specialty-equipment businesses will treat crossovers in the longer term. CUVs haven't been around for as long as other light trucks, and the industry still doesn't quite know what to make of them. While the market is fragmented, it's more than likely that at least a few models will catch on. If we start seeing more models become true enthusiast or collector vehicles, we may see the sales channel mix start to shift.

# POPULAR CUV MODELS



**BMW X5**



**Toyota RAV4**



**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

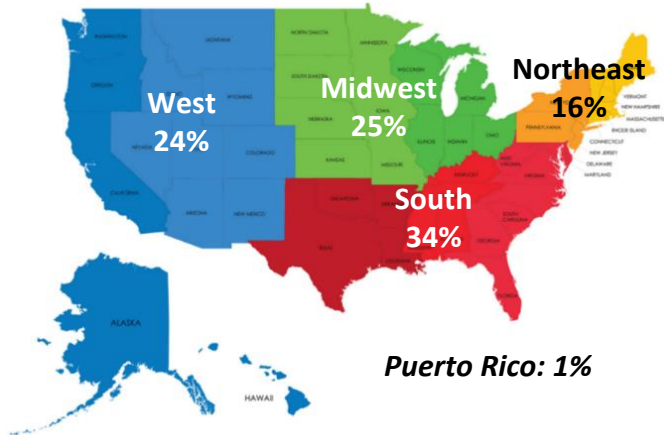
MY 2028: Battery Electric Added

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

# VANS



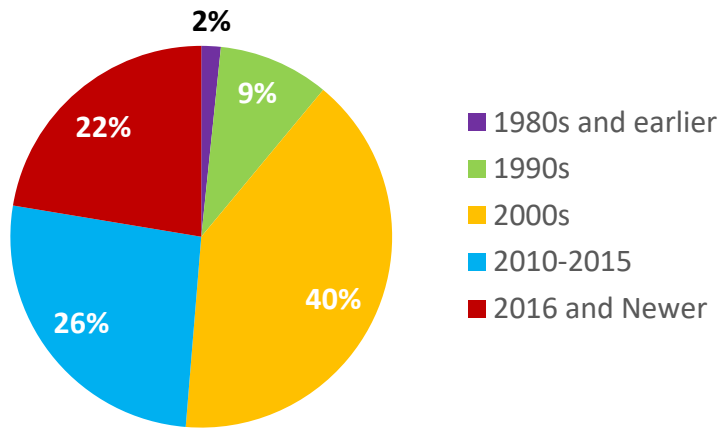
# VANS IN THE UNITED STATES



**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

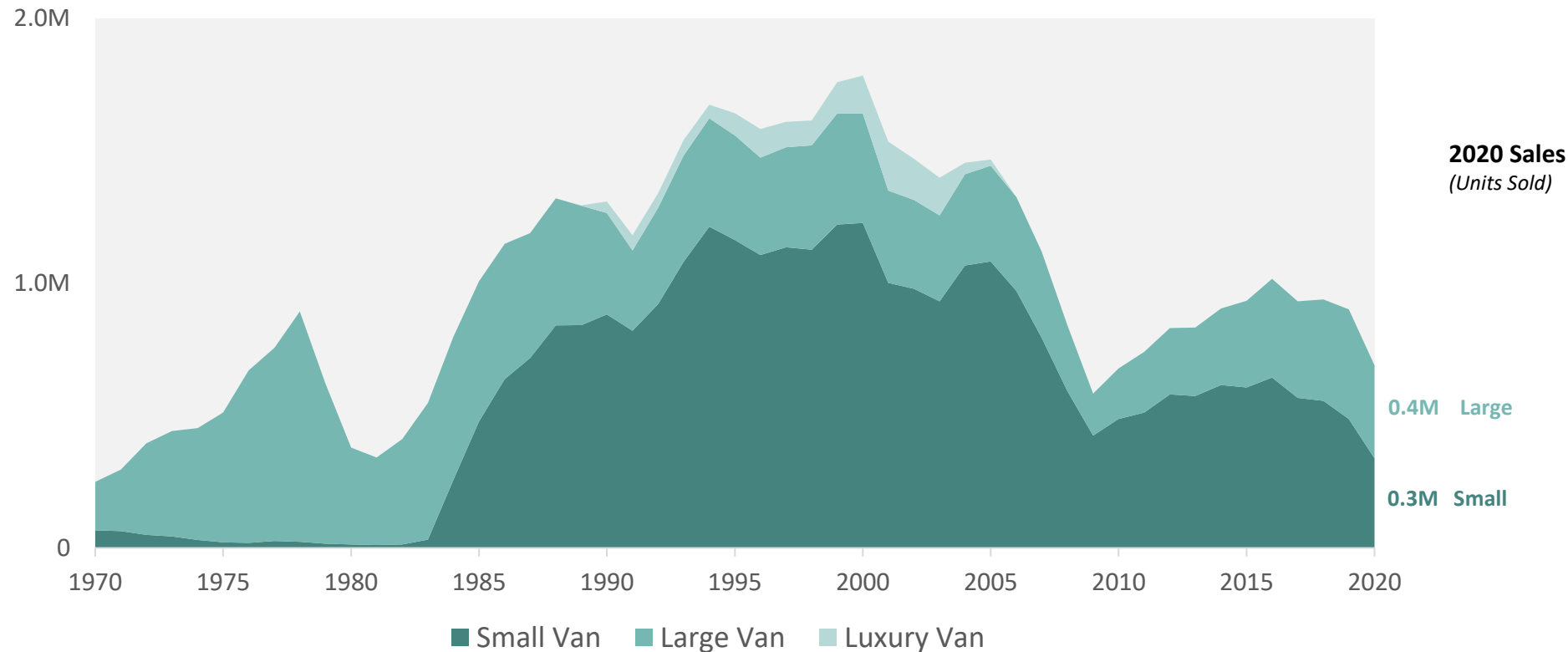
## Vehicle Age



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 E-350	928K
Chevrolet Express 3500	549K
Chevrolet Express 2500	538K
Ford E-250	472K
Ford E-150	395K
Kia Sedona	387K

# MINIVANS HAVE BECOME MORE NICHE

New Van Sales From 1970-2020  
Calendar Year



Minivans had their heyday in the 1990s and 2000s as a more economical family vehicle than bigger, more fuel-intensive SUVs. While sales are unlikely to return to their historic highs, minivans are likely to remain as a niche vehicle.

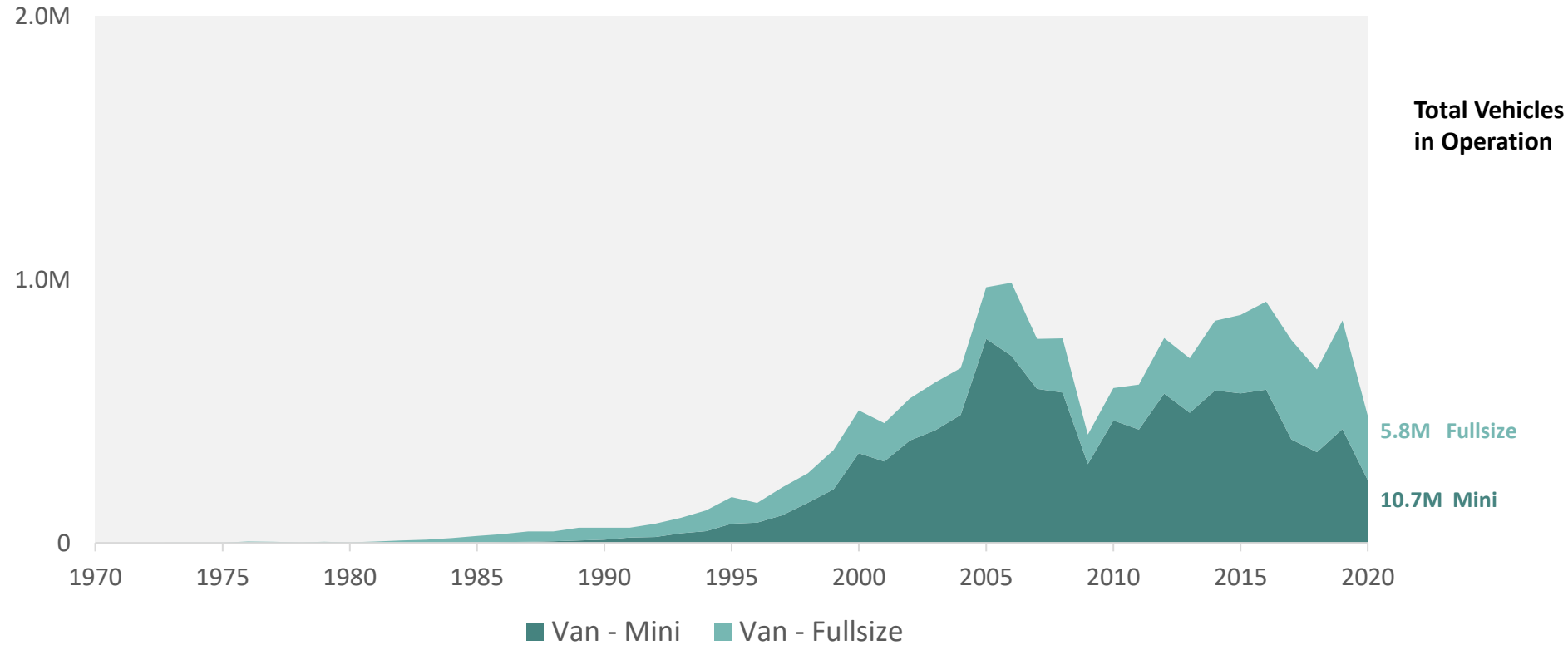
Large vans, like the Sprinter or the Transit model lines, have been a small but steady presence in the United States. Consumers do own and modify them, but they are more likely than other trucks to be bought by organizations on a retail or fleet basis.

The luxury van segment has more or less died off, but when van sales were at their height a few higher-end models did make it out there.

For more information on vehicle sales and population, head to [www.sema.org/vio](http://www.sema.org/vio)

# FULLSIZE VANS BECOMING MORE OF THE SEGMENT

Current Population of Vans  
Model Year

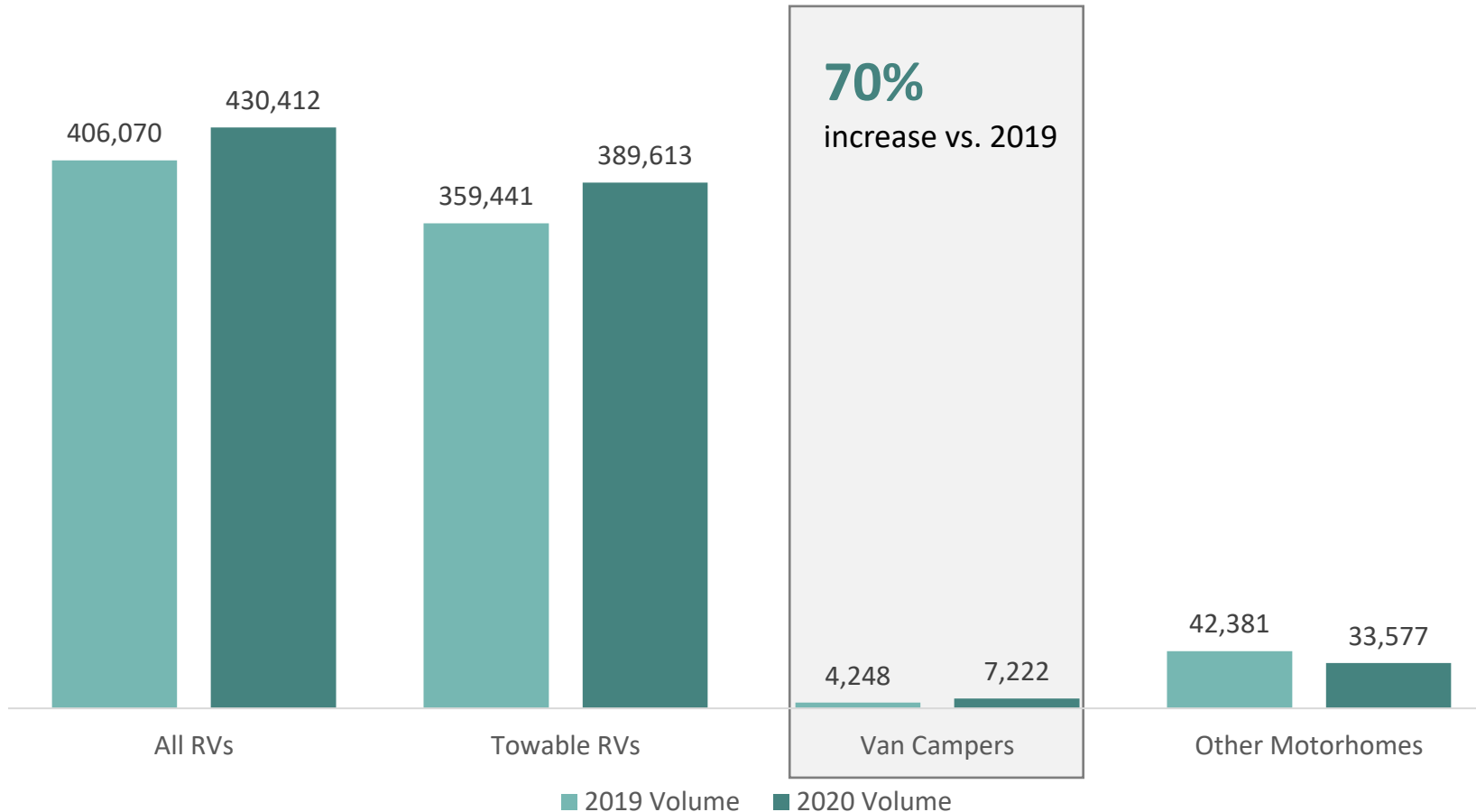


Minivans represent the majority of vans currently on the road. However, fullsize vans seem to be taking share away from minivans since the mid-2000's recession.

The reality is that vans, both fullsize and mini, are likely to remain a relatively small slice of the overall vehicle fleet, and the specialty-equipment aftermarket. But there are definitely niche opportunities for utility upgrades, retrofitting for commercial use, and even conversion into motorhomes.

# VAN CONVERSIONS ARE HAVING A MOMENT

RV Shipments: 2019 vs. 2020  
Calendar Year



Van conversions, aka van campers or even camper vans, represent a small slice of the overall recreational vehicle (RV) market. They have historically been dwarfed by towable RVs and even by larger motorhomes. However, 2020 saw a significant uptick in shipments for these modest RVs, a trend which has so far continued in 2021. Q1 shipments of camper vans this year were up nearly 150% vs. Q1 2020.

This has garnered the van conversion industry some notable hype. Even the *New York Times* ran an article on the trend, titled “The #Vanlife Business Is Booming,” noting how new van conversion companies have sprung up and existing ones have seen significant sales growth during the pandemic.

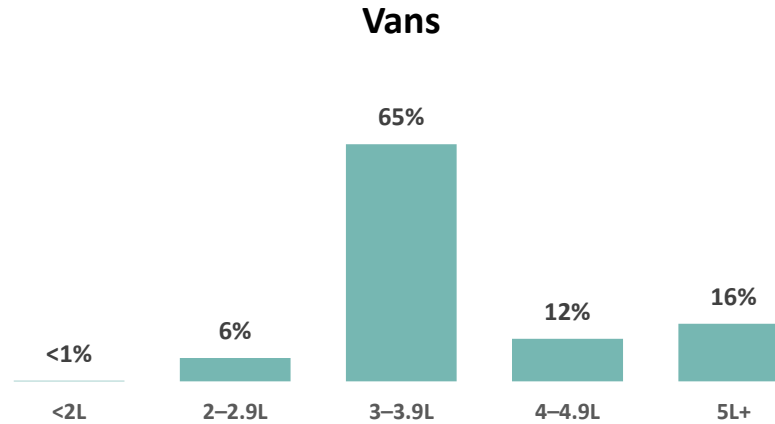
While it is not clear how long this trend will continue, the numbers show that van conversions have benefitted greatly from recent events.

# VAN PROFILE AND FUTURE SALES

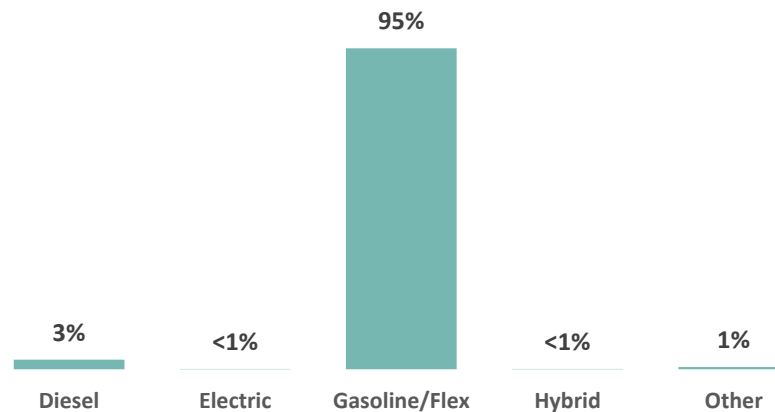
Compared to other segments, vans are neither popular on the road nor highly accessorized. The most common vans are minivans and are primarily functional and family-oriented. While some are accessorized, most consumers who buy parts for vans are not enthusiasts. The most popular van on the road today 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



More Than

40

Van models currently on the road

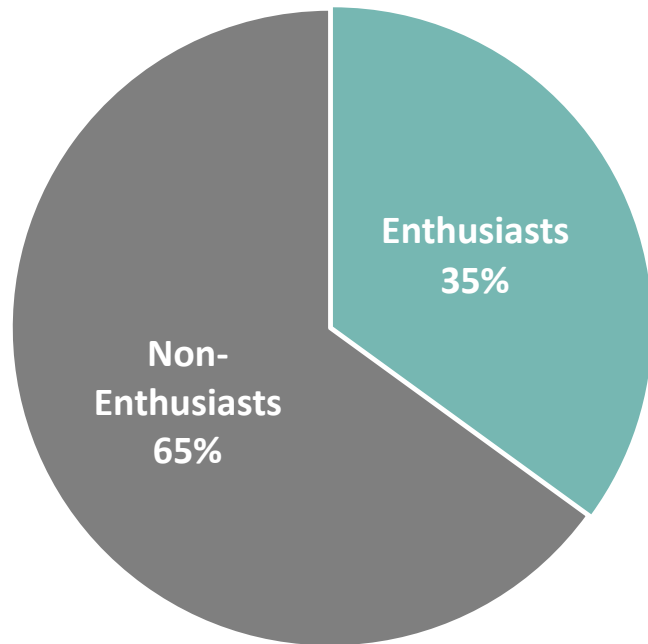
20+

Van models projected to be sold from 2021–2028

### 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 ACCESSORIZATION 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

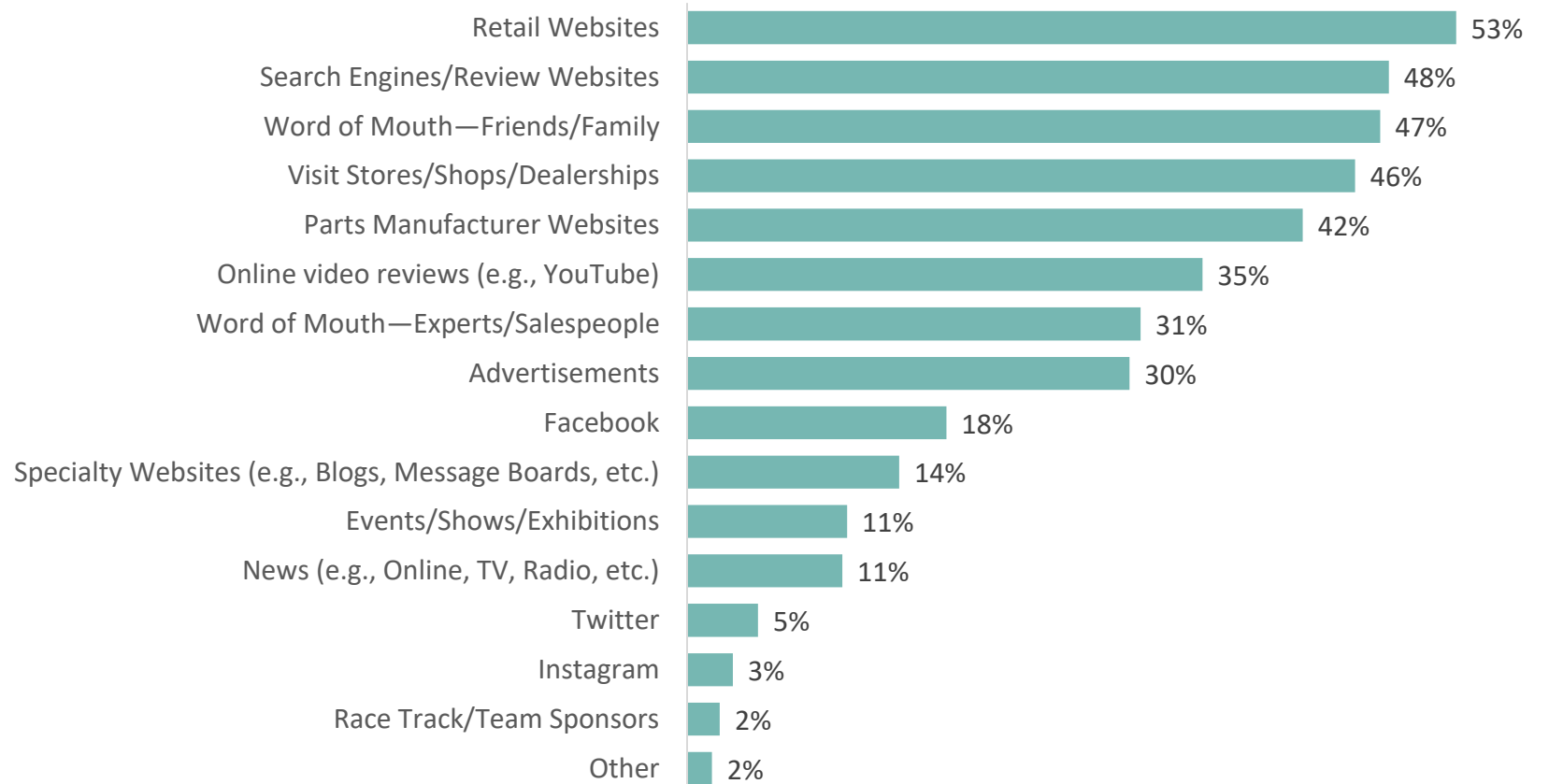
# WHERE VAN ACCESSORIZERS RESEARCH PARTS

Van accessorizers, similar to other light-truck accessorizers, do a lot of research on the web when comes to getting information on parts or ideas for changes they can make to their vehicle.

Search engines and retailer websites are particularly useful resources for them, but they also turn to friends and family for advice and ideas.

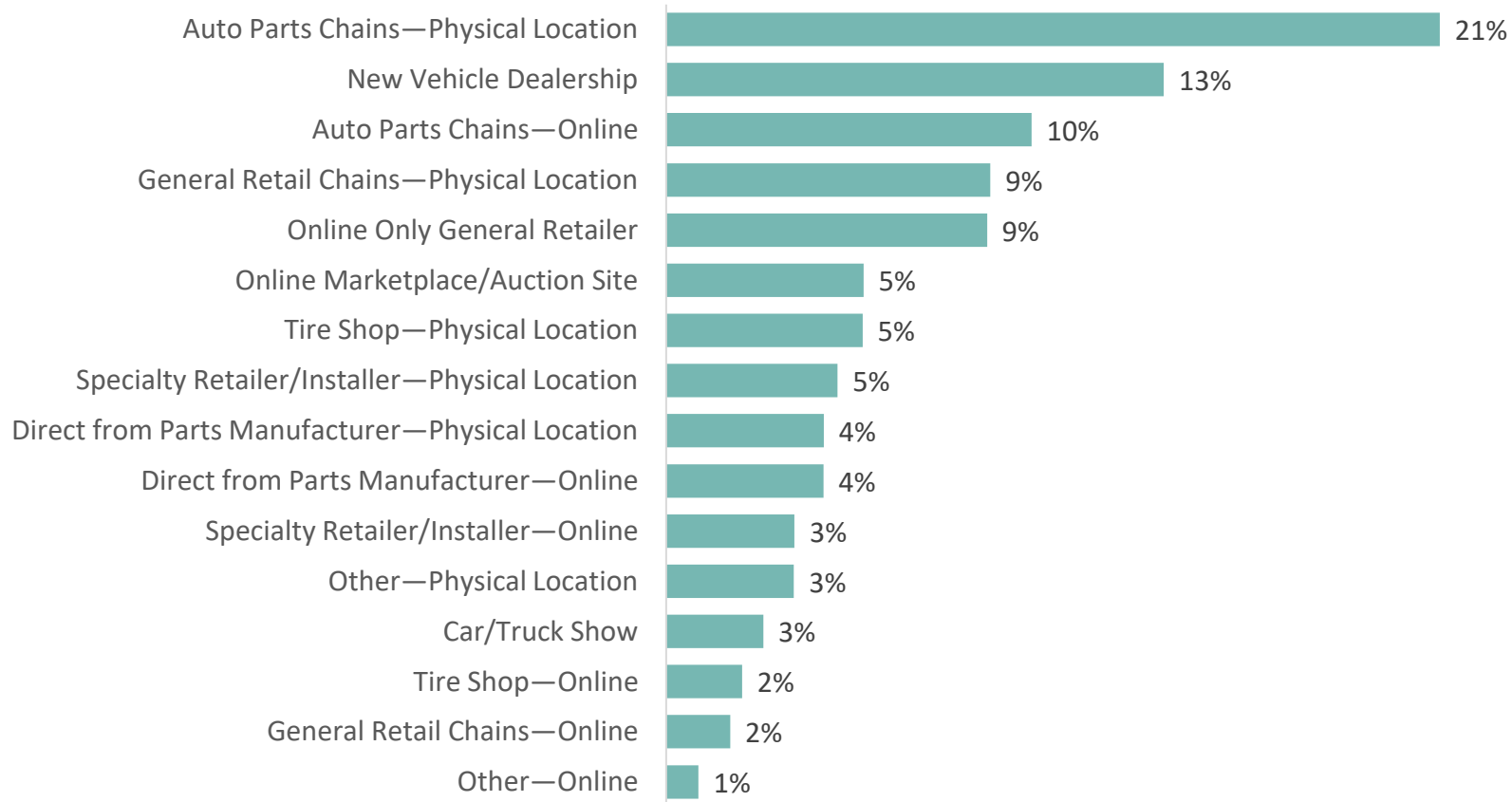
But seeing products up-close and getting recommendations from professionals are also important in the decision-making process for van accessorizers. As with other truck segments, making it easy for van owners to find you online, providing them with detailed product info, and offering expert advice can help you win their business.

## Sources of Information for Parts and Ideas



# WHERE VAN ACCESSORIZERS BUY PARTS

**Distribution of 2019 Retail Sales by Channel**  
*Share of Dollars*



Van accessorizers are somewhat more reliant on mass-market channels than other truck segments, with chain stores comprising a bigger share of 2019 retail sales. Part of this may be due to vans being less commonly thought of as enthusiast vehicles, and having a bigger share of more functional upgrades.

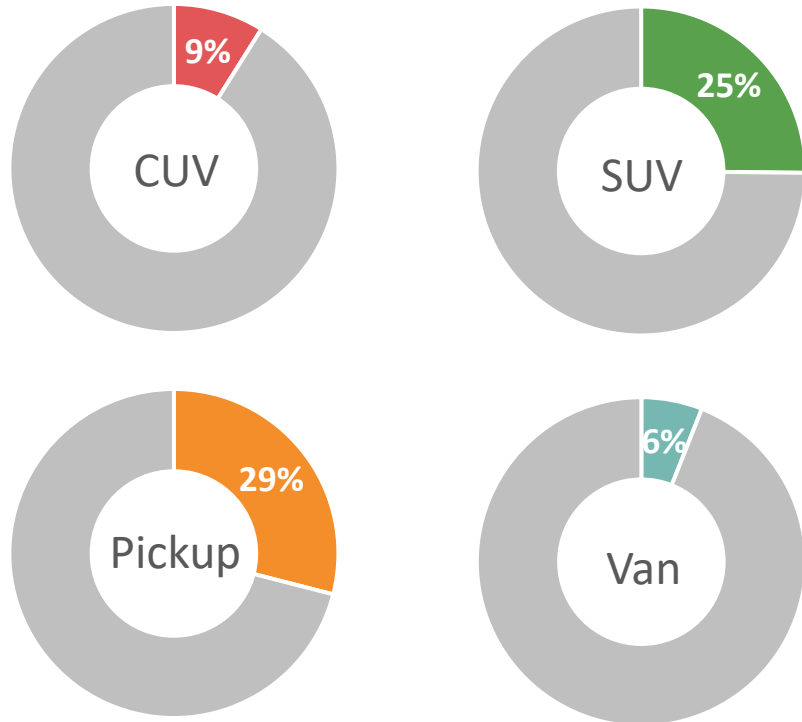
With that said, there is still a niche for independent retail, as there are definitely enthusiasts out there who see vans as a platform for customization. Whether it's retrofitting the interior for work use, turning it into a house on wheels, or even making it into a race vehicle, in addition to the more standard upgrades to comfort and appearance or utility, there are definitely folks out there who want specialty parts for their van.

# OFF-ROADING



# TAKING TRUCKS OFF-ROAD

## Share of Accessorized Vehicles Used for Off-Roading



Among vehicles that were modified or accessorized in 2019

## Popular Off-Roading Vehicles

### Popular Pickups

- Chevrolet Silverado
- Ford F-Series
- RAM Pickups
- Toyota Tacoma
- Toyota Tundra

### Popular SUVs

- Ford Explorer
- Jeep Cherokee
- Jeep Grand Cherokee
- Jeep Wrangler
- Toyota 4Runner

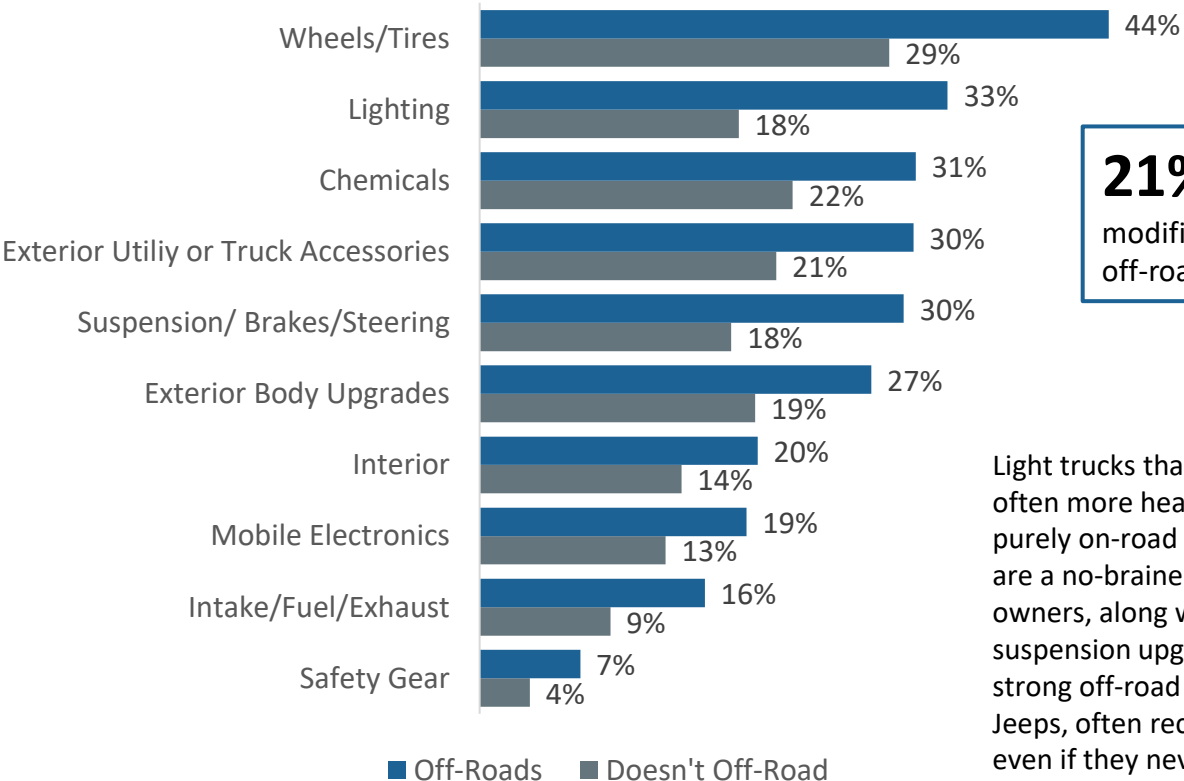
Pickups and SUVs are core to the off-roading culture and are often built and modified with the dirt in mind. Products that make a pickup or SUV off-road-ready, or at least look the part, represent some of the biggest opportunities for the automotive specialty-equipment market.

Given the prominence of Jeep SUVs, particularly the Wrangler, within the off-road community, it is likely we will see the Gladiator become another big vehicle in that scene. The reintroduction of the Ford Bronco is also big news for both off-roading enthusiasts and the businesses that support that passion.

While there hasn't been as much uptake on the CUV side yet, some OEMs are positioning their offerings as off-road vehicles or even offering trim packages and options specifically aimed at off-roading.

# OFF-ROAD TRUCKS ARE GOOD FOR BUSINESS

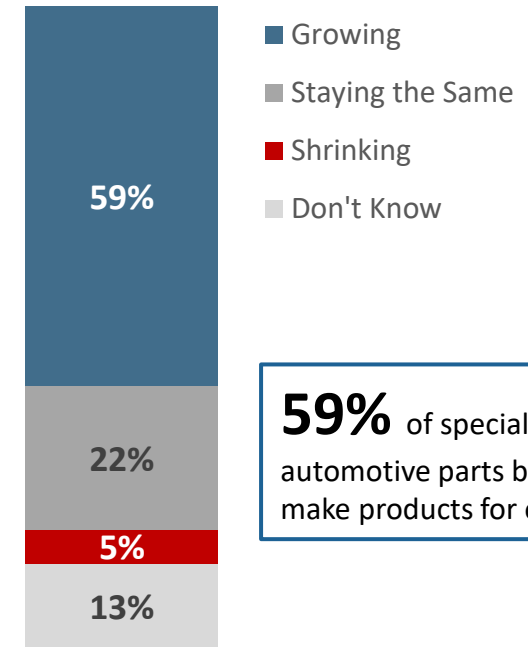
2019 Product Types Purchased for Light Trucks – Off-Road vs. Non-Off-Road



**21%** of light trucks modified in 2019 are used for off-roading by their owners

Light trucks that get taken off-road are often more heavily modified than their purely on-road counterparts. Off-road tires are a no-brainer for many of these vehicles' owners, along with lighting, utility, and suspension upgrades. Vehicles with a strong off-road culture, like pickups and Jeeps, often receive off-road-ready parts even if they never leave the street.

Business View of Off-Road Market Outlook

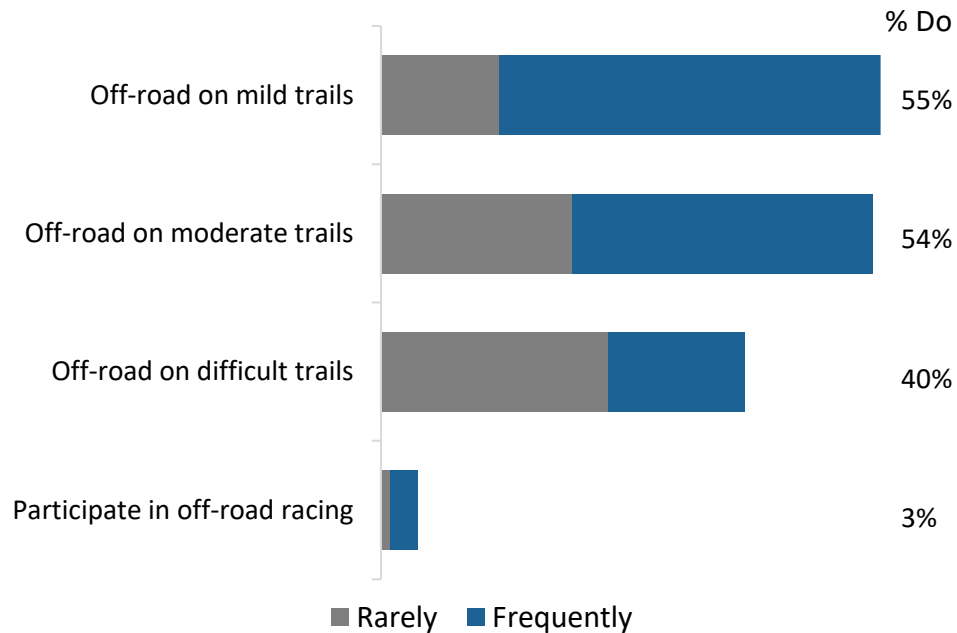


**59%** of specialty automotive parts businesses make products for off-roading

# SPOTLIGHT – JEEP WRANGLER

## Types of Off-Roading Wrangler Accessorizers Do

Among Wrangler modifiers who go off-road



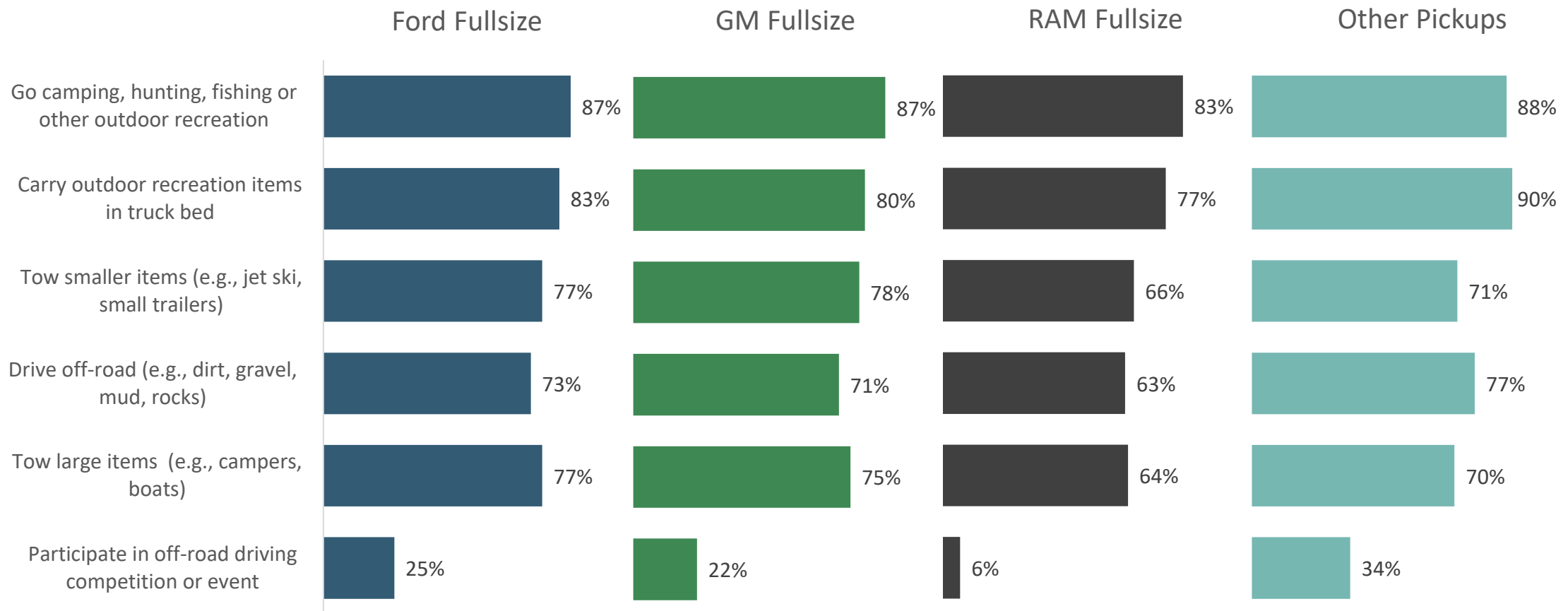
Most off-roading for Wranglers takes place on mild or moderate trails (i.e., dirt, gravel, mud, etc.), but there's definitely also a contingent who go hardcore with rock-crawling and other challenging terrain.

Off-Roaders	Icon	Non Off-Roaders
59%	% <u>Enthusiasts</u>	44%
76%	% <u>lifted</u>	54%
49%	% <u>alter Jeep for specific activities</u>	29%
73%	% <u>have toys</u>	50%

Off-Roaders are more active, both in general and specific to their vehicles. They are more likely to take part in outdoor recreation activities like hiking, camping, fishing, etc., and many will often bring their Jeep along.

# PICKUPS ARE USED FOR OFF-ROAD ACTIVITIES

How Pickup Owners Get Off-Road



# OFF-ROAD EVENTS

## Gatherings



And more...

## Competitions



And more...

In a typical year there are a large number of formal and informal off-road events throughout the United States. Off-road enthusiasts like to get out into the wild and show off, or test, their vehicles in the conditions they've been modified to handle, and such events can take a few different forms.

First there are gatherings like the Jeepers Jamboree and Trail Hero, which are more focused on having fun and safely exploring trails and terrain. Often these are multi-day events, and the bigger-name ones can draw participants from all of over the country.

Competitions and races also draw considerable interest. Some are true off-road races, like the Baja 1000 or Mint 400, but other competitions like King of the Hammers may focus more on testing the limits of an off-road vehicle.

And then, of course, there are many more informal events, where enthusiasts gather to share their passion for going off-road.

4, Meeting Room N231-N264  
on Skywalk to Hotel, Restrooms

Halls N1-N4, Meeting Room N231-N264  
and Transportation Skywalk to Hotel, Restrooms



# OVERLANDING

# OVERLANDING IN THE SPOTLIGHT

## Growth of the Industry

“Over the past decade, we’ve seen meteoric growth in both the industry and the number of attendees. Overland Expo started in 2009 with a handful of exhibitors and 500 attendees to more than 1,200 exhibitors and 55,000+ attendees across the events.

In 2020, in the year where we could not host any live in-person Overland Expo events, we had more than 44,000+ new attendees come through our virtual education programs.”

*-Lindsay Hubley, Lodestone Events*

On November 25, 2020, major specialty-aftermarket retailer AutoAnything announced the launch of Overlander.com, an overlanding-specific online store.

## Overlanding In the News

“Overlanding, the practice of equipping four-wheel drive vehicles for self-reliant adventure travel into the wilderness, is growing rapidly.”

*Trucks.com, “5 Reasons Overland-Style Adventure Travel Is Hot Right Now,” May 2018*

“It was always a fringe activity, attracting either those with a lot of money or those with barely enough. All that has changed.”

*BBC, “Overlanding: A new generation discovers the art of getting lost,” June 2020*

“If ‘overlanding’ was not known to the auto industry before, it sure knows now.”

*Tread Magazine, “SEMA Show 2019 Highlights,” November 2019*

“More Americans are forsaking crowded campgrounds and recreational vehicles parked on concrete slabs like wheeled weekend cabins, and instead they are “overlanding”—traveling to remote destinations with an emphasis on self-reliance.”

*Wards Auto, “Overlanders Take Camping to Opulent New Levels,” August 2020*

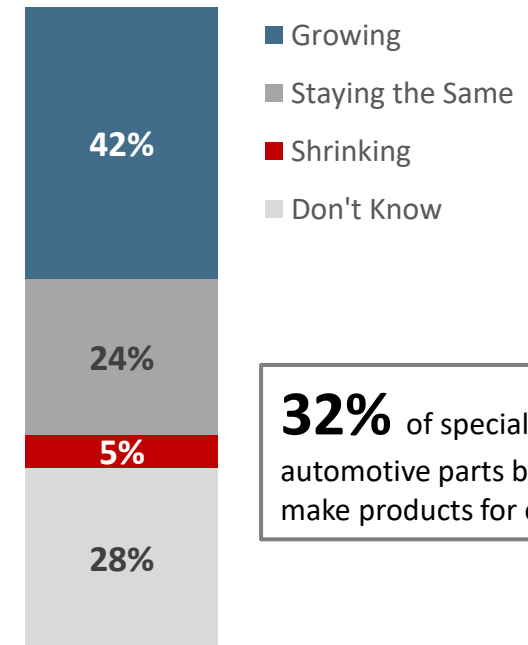
# OVERLANDING AT A GLANCE

Sample of Popular Vehicle Models	
Chevrolet Colorado	Ram Pickups
Dodge Sprinter Vans	Toyota 4Runner
Ford F-Series	Toyota FJ Cruiser
Jeep Gladiator	Toyota Land Cruiser
Jeep Wrangler	Toyota Tacoma
Lexus GX	Toyota Tundra

*Note: This list is based on estimates from multiple sources but should not be considered exhaustive..*

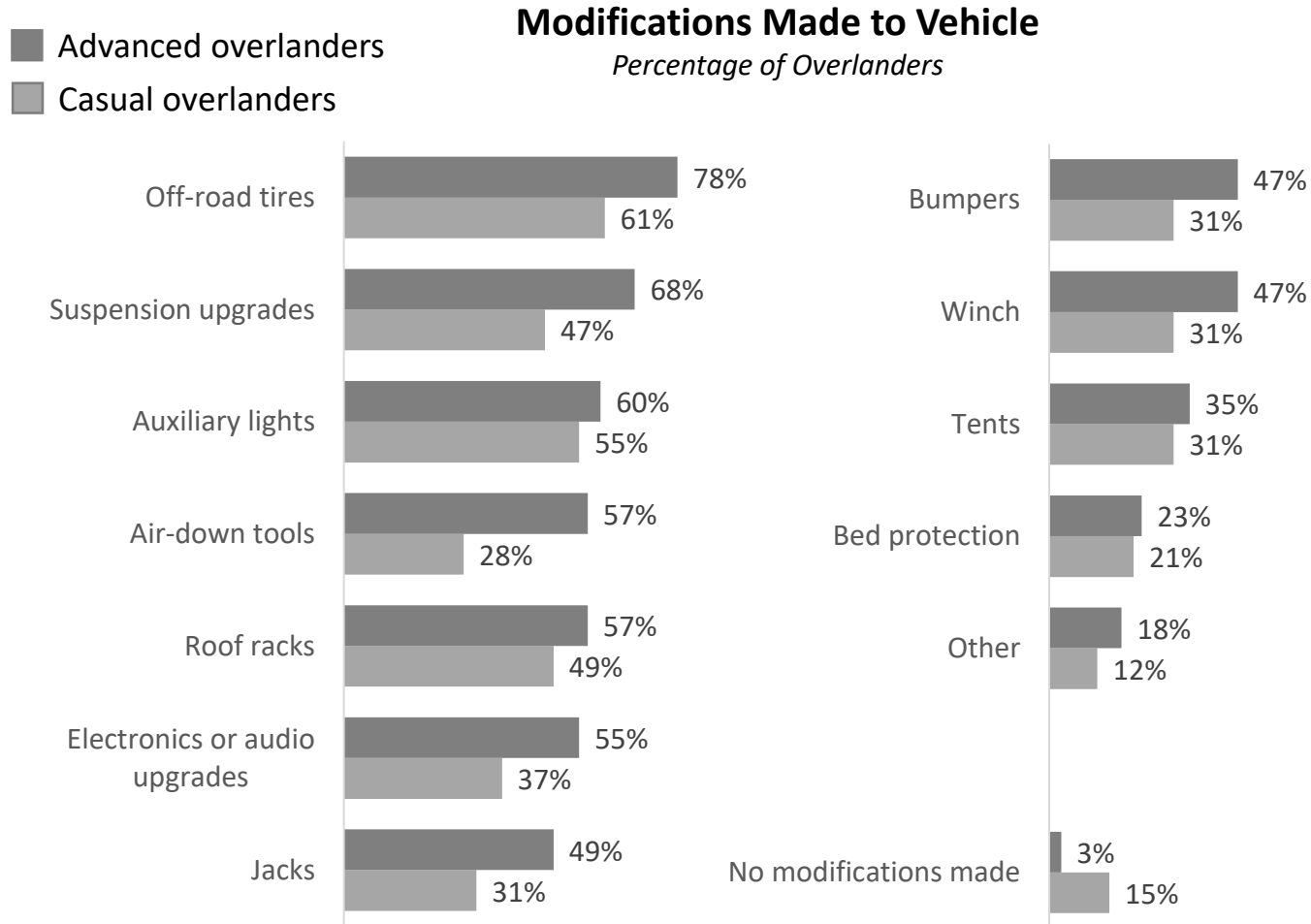
Overlanding, particularly outside the United States, has traditionally been centered around SUVs and even some van models. However, pickups are gaining prominence in the U.S. overlanding scene.

## Business View of Market Outlook



**32%** of specialty automotive parts businesses make products for overlanding

# What Overlanders Buy



## Definitions

**Advanced overlanders** meet at least two of the following criteria:

- Feel they “know all about” overlanding
- Typically go on overlanding trips at least once a month
- Overlanding trips are typically four to seven nights or more
- Usually travel 5+ hours from home for their overlanding trips

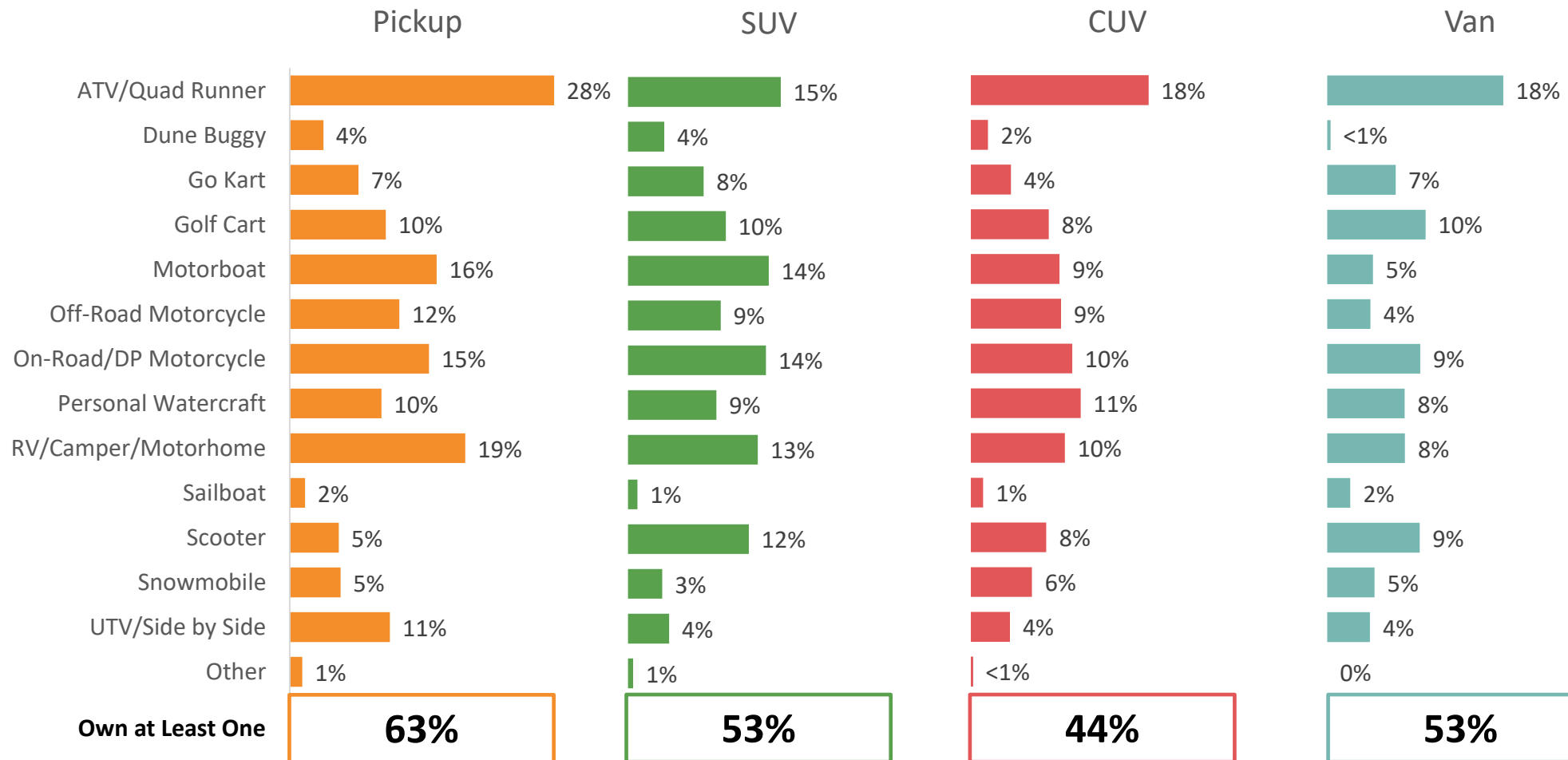
**Casual overlanders** meet at most one of the advanced overlander criteria.

# OUTDOOR RECREATION



# TRUCK ACCESSORIZERS LIKE THEIR TOYS

## Ownership of Sports/Recreational Equipment Percentage of 2019 Light-Truck Accessorizers

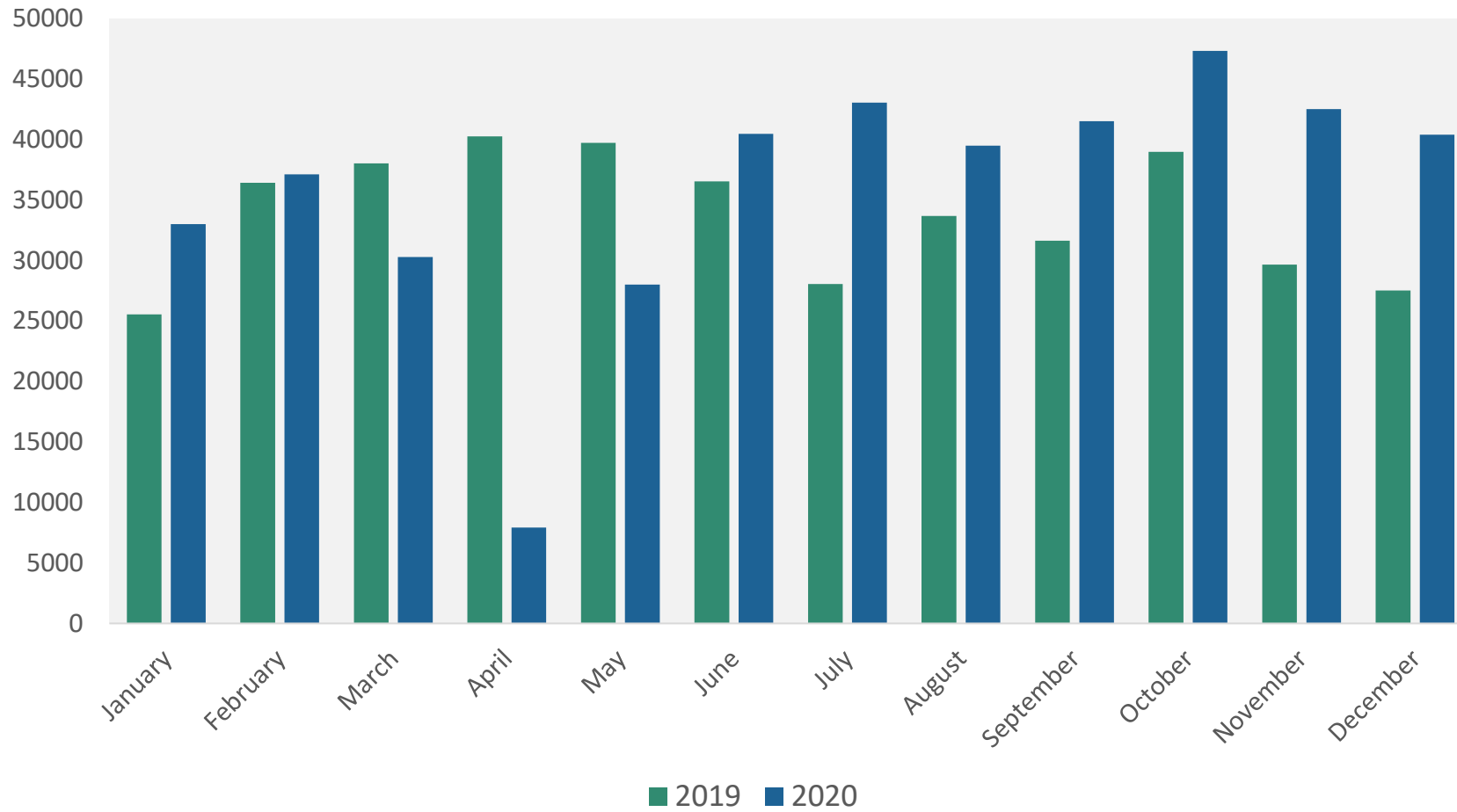


If you see a trailer on the highway, odds are there's a truck pulling it. Many light-truck accessorizers own some form of recreational gear, and getting it to the lake, track, or trail often demands specialized towing or hauling products.

Companies that make products for both on-road and off-road vehicles may find their truck-owning customers represent a cross-selling opportunity to help them upgrade their other toys.

# TRAVEL TRAILERS HAVE HAD A GREAT YEAR

## Wholesale RV Shipments (Units)



Most people hearing the term “RV” might think of motorhomes built on a coach frame or even a pickup chassis. But the reality is that around 90% of what the Recreational Vehicle Industry Association classifies as an RV is actually towed. Travel trailers, in particular, dominate the RV market in terms of units sold.

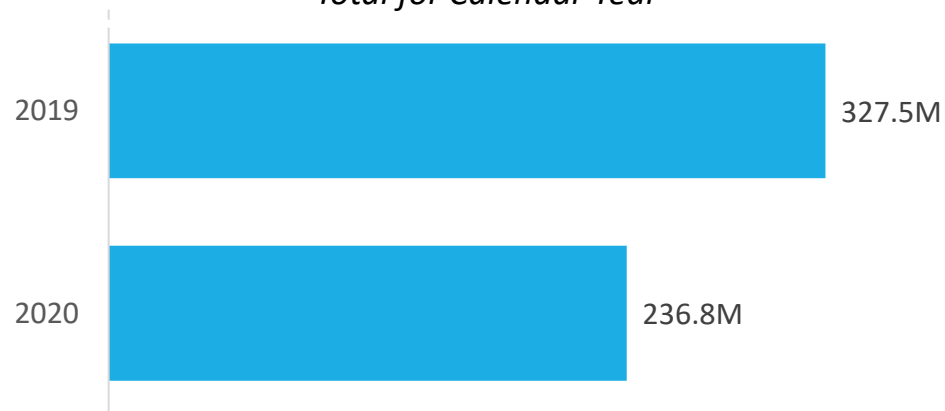
And despite a heavy shock at the beginning of the COVID-19 pandemic, 2020 was actually a good year for the recreational vehicle industry. The towable RVs that make up the core of the market rebounded hard in the second quarter of 2020 and saw sustained highs through the end of the year. That trend has continued, and arguably even accelerated, into 2021 so far. Even larger, more expensive motorhomes have seen shipments rally versus this time last year, and the categories which did perform well in 2020—travel trailers and van conversions—are still seeing historic highs.

And that’s good for the light-truck market. Odds are that if you’re towing something as heavy as a travel trailer, you’re using a truck to do it. And that, in turn, may mean you need specialized parts to do it properly.

# PARK VISITATIONS ARE RECOVERING

## Recreational Visits to U.S. National Parks

Total for Calendar Year

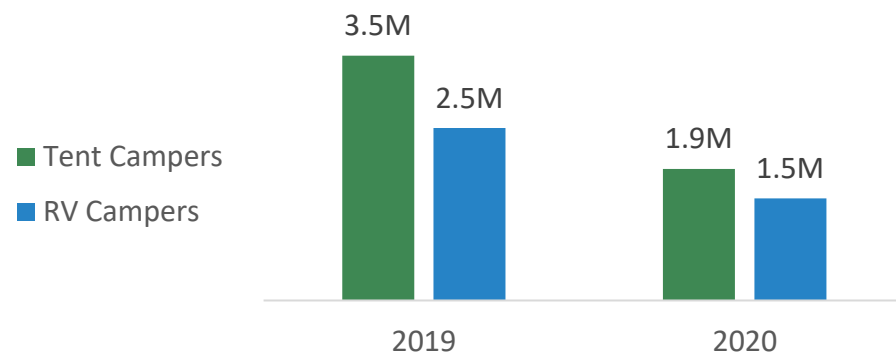


National parks are vital to the outdoor recreation community in the United States, offering access to millions of visitors each year for both short intra-day visits and, in some cases, the ability to camp overnight in a tent (including overlanding) or even an RV/motorhome.

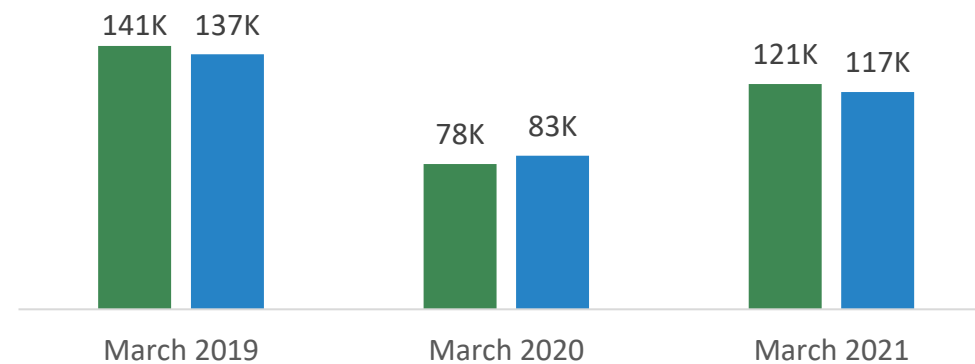
COVID-19 caused many national parks to limit or even prohibit visitors temporarily, but those that remained open often saw significant spikes in traffic. By March of 2021, we were already seeing visits begin to recover towards pre-COVID levels.

## Overnight Camping Visits to U.S. National Parks

Total for Calendar Year

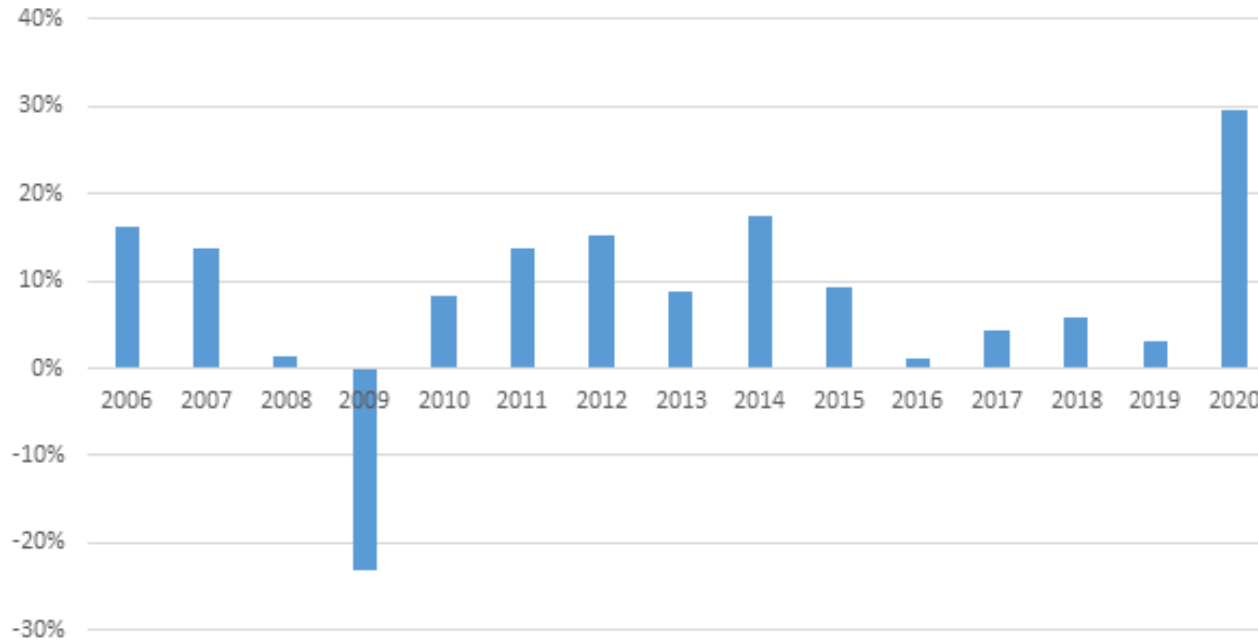


## Overnight Visits Starting to Recover



# UTVs AND OTHER POWERSPORTS HAD A GREAT 2020

UTV US Sales Growth/Decline



**48.5%** growth in  
off-road motorcycle sales in 2020

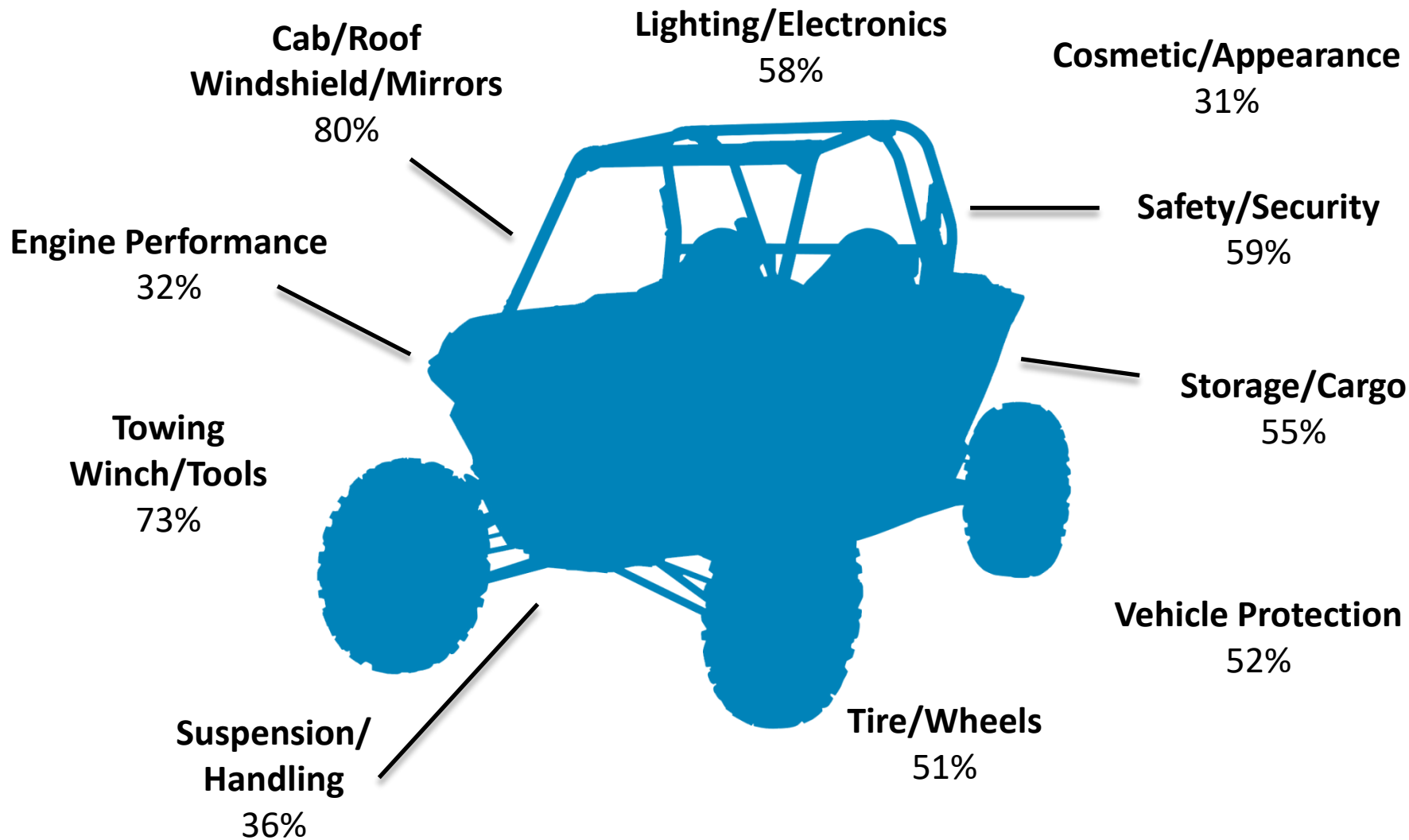
**33.8%** growth in ATV  
sales in 2020

Off-highway vehicles—off-road motorcycles, ATVs, UTVs, etc.—saw a major spike in sales volumes for 2020. The UTV market reached a record high, surpassing 615,000 units sold for the first time ever on the back of a 30% spike in sales versus 2019. And much like RVs, this trend has so far continued into 2021, with first-quarter unit sales 50% higher than in 2020.

This is good news for the light-truck market. First, all these new toys need to get to the trail, and truck beds or trailers are often the best way to make that happen. More off-road vehicles means more need for bed protection and towing products.

As with other aspects of outdoor recreation, COVID-19 proved a blessing in disguise for the powersports market. While it's hard to say how long these record sales numbers will last, it's an opportunity for the specialty-equipment industry while they do.

# HOW UTVS GET MODIFIED



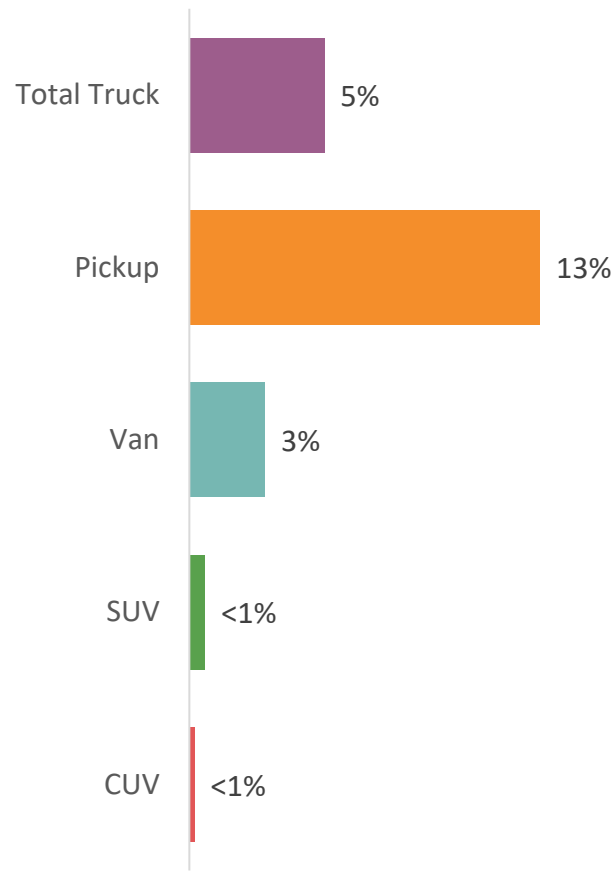
SEMA conducted research into UTV accessorization that showed many UTVs are modified by their owners. Utility and functional accessories are the most common, but a sizeable percentage of these vehicles also receive upgrades to their performance and handling.

# POWERTRAIN & TECHNOLOGY TRENDS



# LIGHT-DUTY DIESEL IS LARGELY PICKUPS

## Share of Diesel Trucks Within Segment



Diesel has always been a niche subsegment of light-duty trucks, representing about 5% of the light truck fleet overall. It is more important within pickups, particularly among three-quarter-ton and one-ton models.

Since it is rarely a default powertrain, buying a diesel truck is usually a conscious choice for those who plan to do heavier-duty hauling or towing.

## Top Diesel-Equipped Light Trucks

Ford F-Series (F-250/F-350)

Chevrolet Silverado/GMC Sierra (2500/3500)

Ram Pickup (2500/3500)

Mercedes-Benz Sprinter Vans (2500/3500)

Ford E-Series (E-250/E-350)

Ford Excursion (discontinued)

Chevrolet Colorado/GMC Canyon

BMW X5

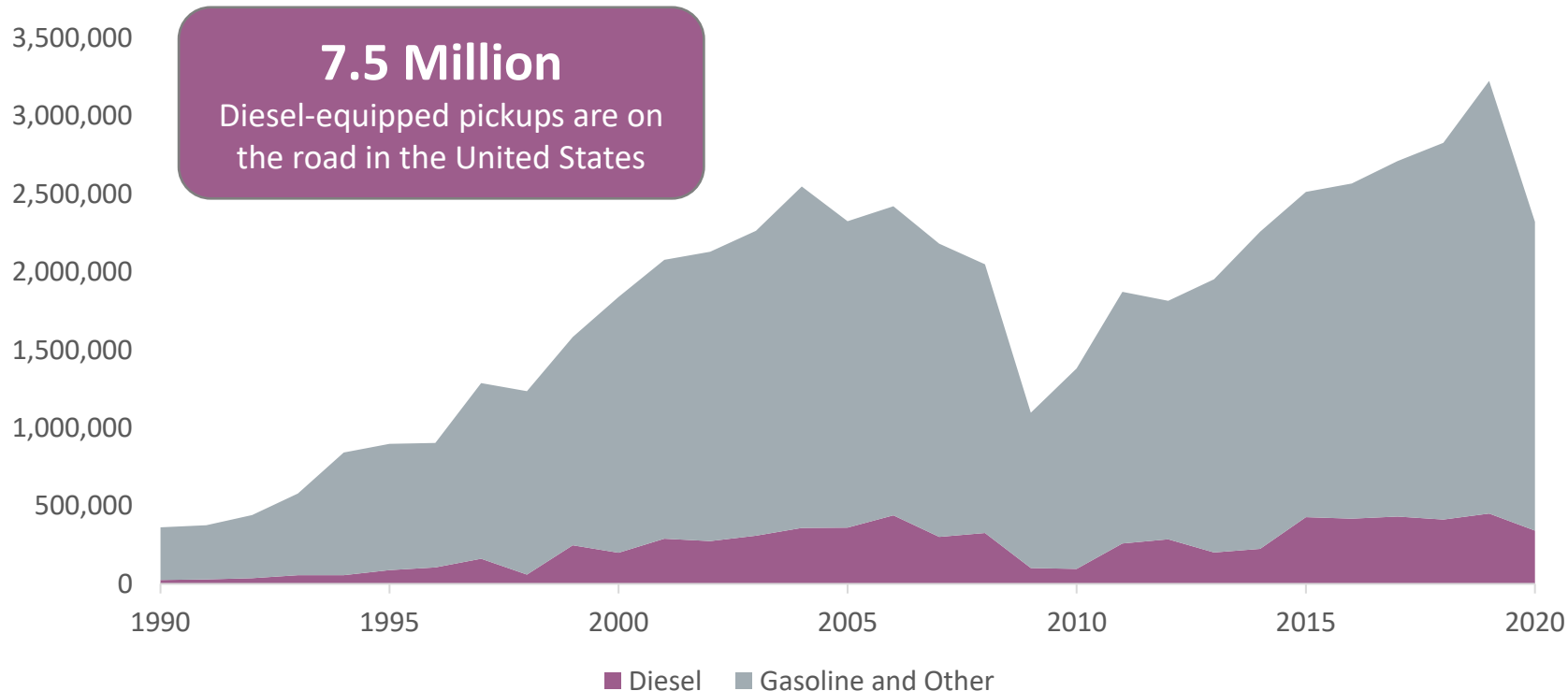
Nissan Titan XD

Jeep Grand Cherokee

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

# LIGHT-DUTY DIESEL IS LARGELY PICKUPS

## Diesel Pickups in Operation

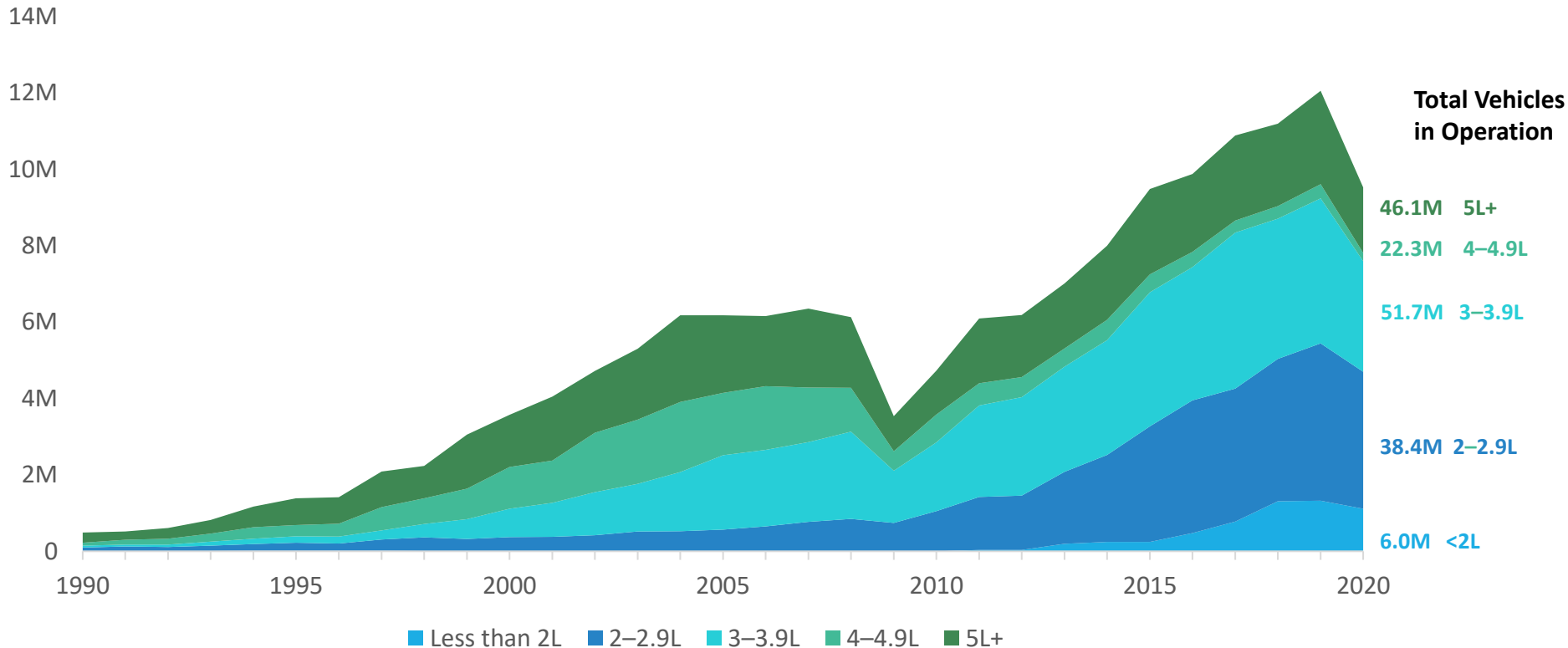


Diesel has been a pretty stable niche within the pickup space for the past few decades, offering owners who want greater carrying or towing capacity a way to make their truck into a true workhorse. For the most part, diesel powertrains are equipped on three-quarter-ton and larger trucks.

As far as the specialty-equipment market is concerned, diesel pickup owners are seen as a somewhat idiosyncratic customer base. Businesses that can really “speak diesel” and understand the unique requirements for these vehicles can gain a leg up on the competition.

# LIGHT TRUCKS ARE GETTING SMALLER ENGINES

**Breakdown of Light-Truck Engine Displacement**  
*Within model year registrations*



Government regulations around fuel economy and limiting vehicle emissions have prompted vehicle manufacturers to look for ways to make their offerings more efficient.

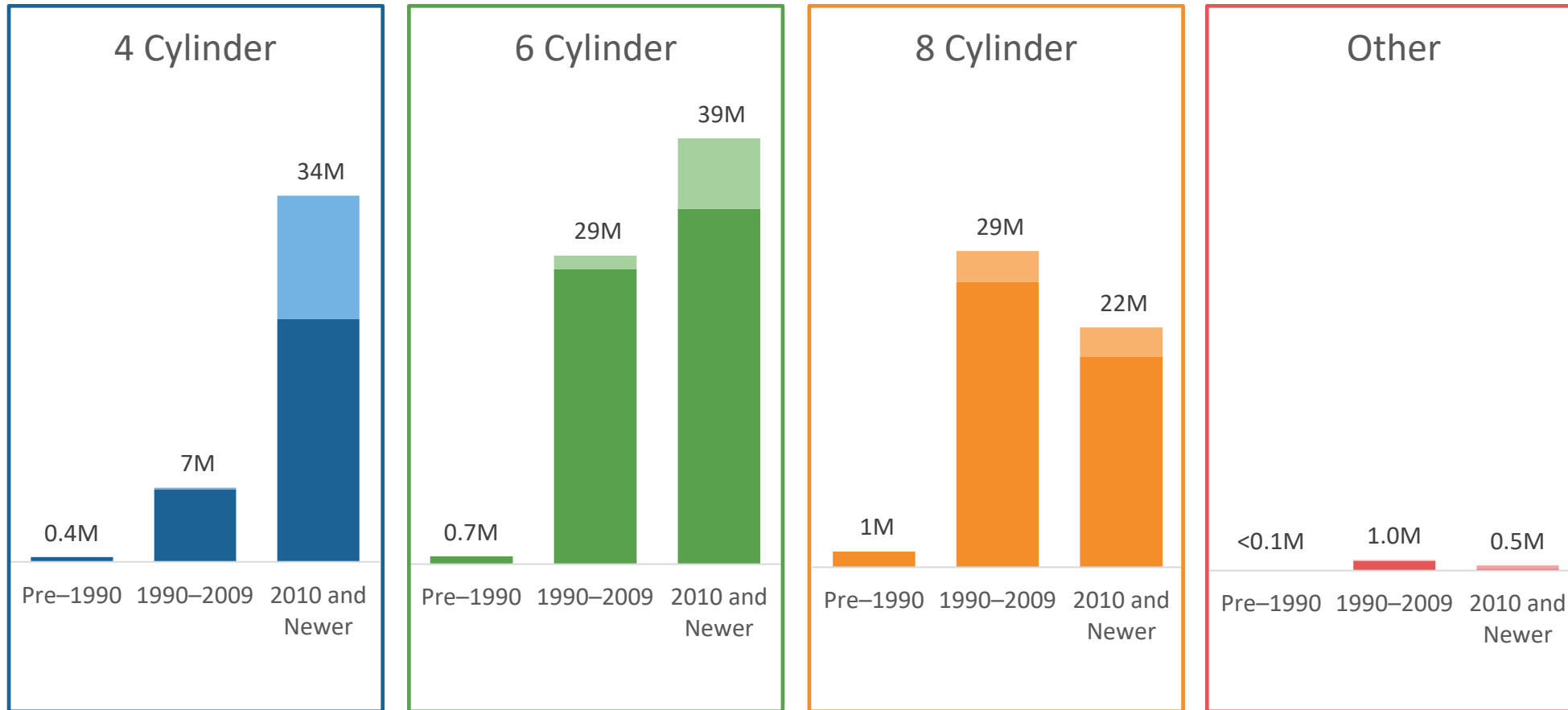
Part of their strategy to do so has been putting smaller, more economical engines into light trucks. While the growth of sub-3.0-liter engines has mainly been playing out in CUVs, other segments have also seen a phasing out of engines in the 4–4.9-liter range.

That said, there is still a need for performance, especially in pickups and SUVs. Larger pickups still sell a lot of powertrains in the 5L+ range. And in smaller engines, forced induction is becoming more common as a way to get more power from less fuel.

# FORCED INDUCTION ENABLES SMALLER ENGINES

- Forced Induction
- Naturally Aspirated

**Light Truck Engine Aspiration by # Cylinders**  
*Within model year registrations*

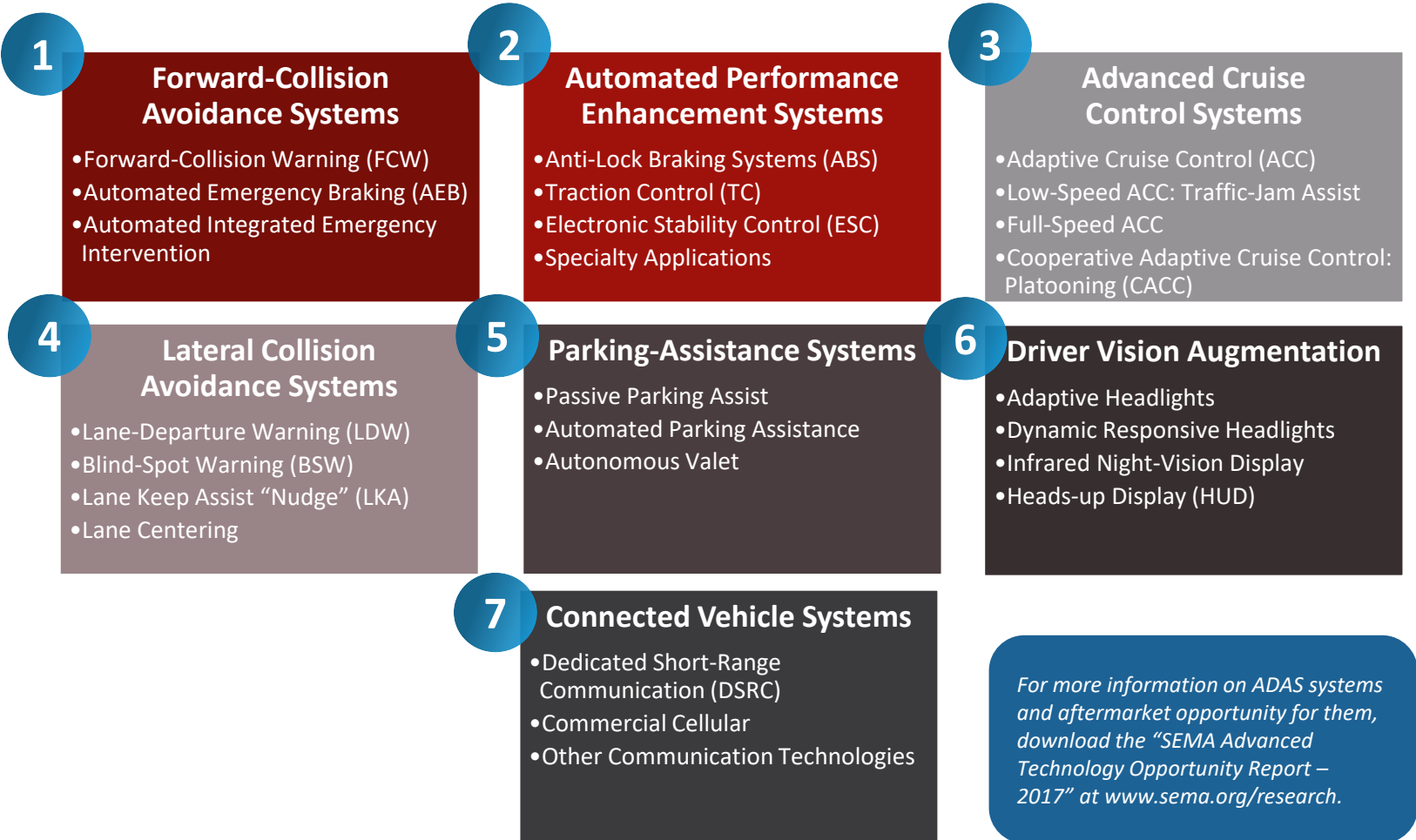


In recent years, we have begun to see a trend in light trucks: make the engine smaller, but add forced induction (especially turbochargers). Vehicle manufacturers see this as a way to provide greater fuel efficiency without sacrificing performance.

This is good news for aftermarket turbo manufacturers, who have more opportunity than ever to improve on the original design for a vehicle that was made to carry their product rather than trying to shoehorn it into the engine bay.

While most light truck engines are still naturally aspirated, forced induction is taking up a growing share of vehicles sold and on the road.

# ADVANCED DRIVER-ASSIST SYSTEMS (ADAS) ARE BECOMING MORE COMMON



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).

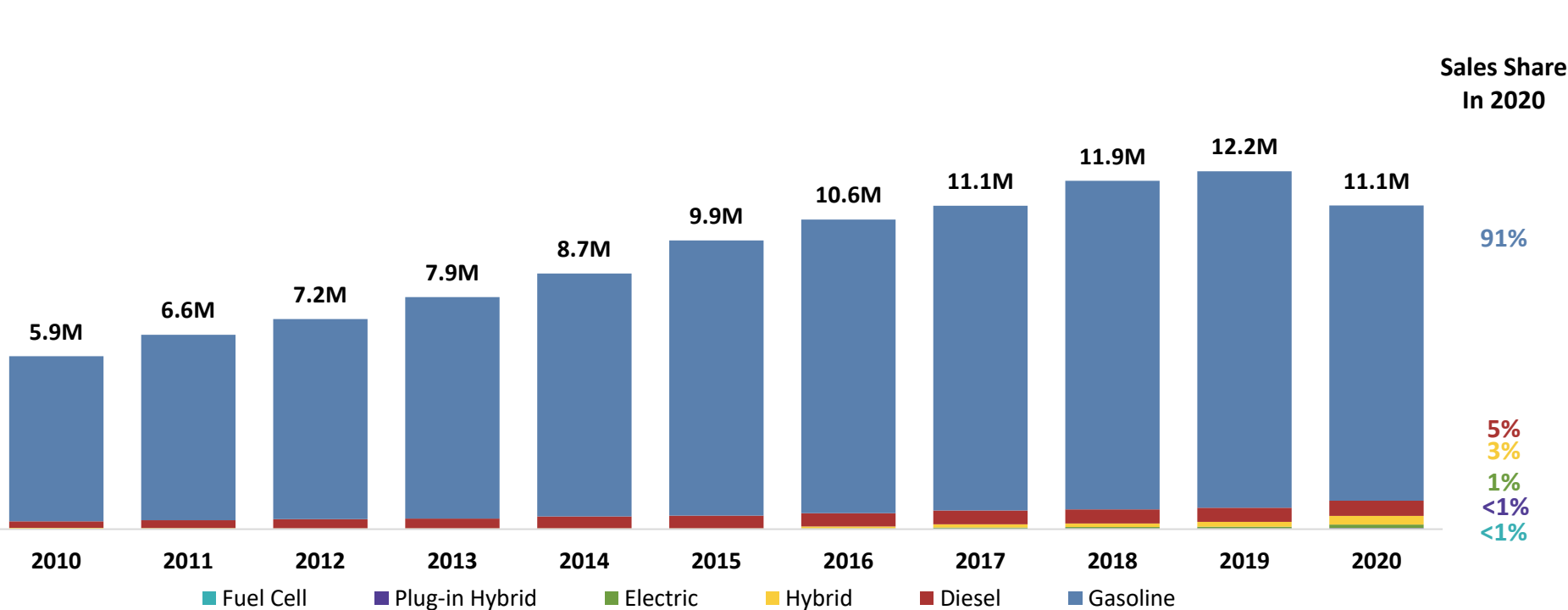
Top ADAS OEM Installations on New Cars (MY 2020 Vehicles)

	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. Several of these technologies are driven by sensors which need to be calibrated based on the height of the vehicle in order to function properly. This has particular implications for light trucks, which are more likely to be lifted, carry off-road tires, or have body modifications that require thinking about how front, side, or rear sensors may be affected after these specialty parts are installed.

# THE BEGINNING OF ELECTRIC TRUCKS

New Light-Truck Sales: Powertrain Composition



While hybrids, electric vehicles, and other alternative fuels have been big news over the past few years, vehicle manufacturers have mostly been putting these alternate powertrains into smaller cars. Adoption has been, and likely will continue to be, slower in truck segments.

Natural gas has seen some use in commercial vehicles, and it's possible that hybrids and electrics will similarly gain traction there first. But when it comes to consumer-owned, light-duty trucks, these alternative fuel types may have more of an uphill battle. Consumer preferences and the greater power requirements for light trucks versus cars, particularly with pickups, may present electric vehicle manufacturers with an uphill battle in the short term.

However, the opportunity is there, and manufacturers like Tesla, Rivian, and even the Detroit 3 are introducing electric light trucks to the market. If they can prove these vehicles can compete on performance and, ideally, price, we may see things start to take off.

91%

5%  
3%  
1%  
<1%  
<1%

# ELECTRIC PICKUPS ARE COMING

Here are three upcoming electric pickups



## 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)

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



**Jeep Wrangler 4xe**

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

**Range** 370 miles

**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 where 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.

# ADDITIONAL INFORMATION



# GLOSSARY / VEHICLE NET DEFINITIONS

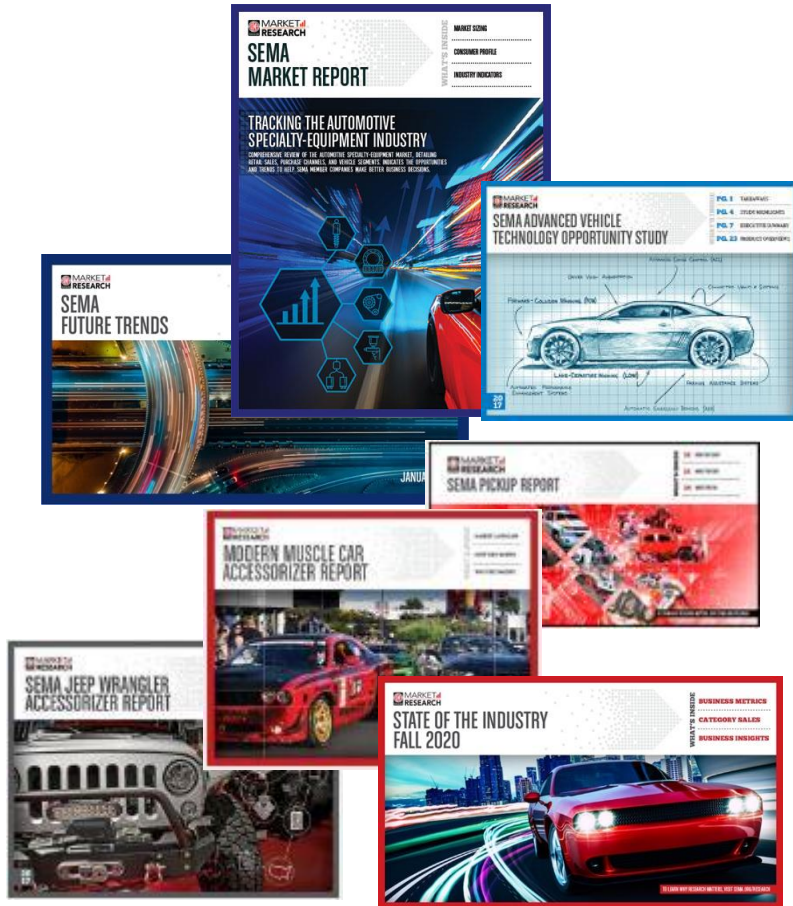
Vehicle models with rebadged variants or that were otherwise extremely similar to other vehicle models were combined for simplicity in the analysis. Here are netted models referenced in the report:

<b>Audi Q5</b>	<i>Audi Q5, SQ5</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 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 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>

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**2020 SEMA Market Report**

**SEMA Future Trends—January 2021**

**SEMA State of the Industry — Fall 2020**

**SEMA Vehicle Opportunity Report: Hot Cars and Trucks**

**Modern Muscle Car Accessorizer Report**

**SEMA Jeep Wrangler Report**

**Advanced Vehicle Technology Opportunity Report**

**SEMA Pickup Report**

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# Questions?

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Comments and suggestions appreciated.  
Happy to provide clarifications. SEMA  
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