



DataMac[®] Truck



**Mackay
& Company[®]**

2015 DataMac[®] Truck U.S. Operator Report

**Heavy Duty Parts Aftermarket Monitor and
Forecast Service**

To purchase this entire 105 page report, contact John Blodgett at
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[Sample pages below, taken from most recent report.](#)



EXECUTIVE SUMMARY AND KEY OBSERVATIONS

Utilizing information collected for publication of our quarterly DataPulse and monthly DataPulse Plus reports, MacKay & Company provides our clients with a continuous flow of timely statistics on vehicle utilization and business conditions based upon constant input from fleets, dealers and distributors. This collected data is combined with other published industry indices to serve as basic information sources in our continuing effort to provide our customers with the most comprehensive and timely status reporting available within today's truck parts industry.

As is generally the case due to timing of the annual DataMac® Truck Operator Report, actual data utilized in generating the 2014 report was available for only the first two quarters of that calendar year. Given this unavoidable limitation, full-year sales volumes published in that report were based upon our forecast for the balance of the 2014. As instituted in 2011, the DataMac® Truck Operator Report and DataMac® model for 2015 reflect restated actual 2014 economics and volumes that, we believe, provide a sound starting point for an accurate projection of truck parts demand in 2015 and beyond. As in the past, the DataMac® model utilizes annualized forecasts of vehicle utilization, parked truck populations and anticipated trends in parts pricing.

The 2015 Operator Report continues to incorporate the structural enhancements introduced in 2011. Included in these enhancements are the separation of container chassis information from trailer information and the expansion of vocational reporting categories to include individual sections for government and refuse fleets.

Presented in the next section of this report is a summary of key economic outlook and forecast assumptions underlying creation of the information presented in the DataMac® 2015 Truck Operator Report.

RESPONDENT AND SURVEY PROFILE

2015 Survey Cycle – Surveyed Components

The 2015 MacKay & Company Aftermarket Monitor Report is based upon current service practice information collected by means of 4 surveys completed by operators and maintainers of medium and heavy duty trucks in the United States. Surveyed power generation components included diesel engine belts and hoses, diesel exhaust components and EGR, DPF and SCR engine emission components. In the power transmission subgroup, axle and propshaft components were surveyed while air brake, power steering and rear suspension system components, included in the undercarriage subgroup, were also surveyed. Questions about fifth wheel components, members of the “Other” component sub-group, were also included in the 2015 operator surveys. These components were covered in surveys distributed in 4 separate mailings posted in June 2014, September 2014, December 2014 and March 2015.

The 204 components covered in these 2015 surveys represent 31% of the 653 components currently included in the DataMac® database and 36% of the value of forecast 2015 total replacement parts demand. As in all DataMac® surveys, we requested identification of providers of service, types of repairs performed and distribution channels from which parts are procured. In addition, respondents were asked to provide average annual miles travelled by their vehicles between surveyed component replacements as well as number of miles driven since the most recent occurrence of component failure or repair.

2015 Survey Cycle Surveyed Components

Component	Surveyed	Last Surveyed	Report Year	% of Total Components	% of 2014 Total \$
Diesel Engine Belts & Hoses	December, 2014	September, 2011	2012	3.8%	1.6%
Diesel Exhaust Components	December, 2014	December, 2011	2012	2.8%	0.7%
EGR, DPF & SCR components	March, 2015	December, 2011	2012	5.4%	11.3%
Driveline Components	September, 2014	March, 2009	2009	1.8%	2.2%
Drive Axle Components	June, 2014	December, 2011	2012	3.2%	6.2%
Suspension Systems - Rear	June, 2014	September, 2010	2011	4.3%	4.8%
Power Steering Components	December, 2014	March, 2009	2009	1.8%	2.7%
Air Brake System Components	September, 2014	March, 2010	2010	5.8%	4.9%
Fifth Wheels	March, 2015	March, 2007	2007	2.3%	1.8%
TOTAL				31.2%	36.2%

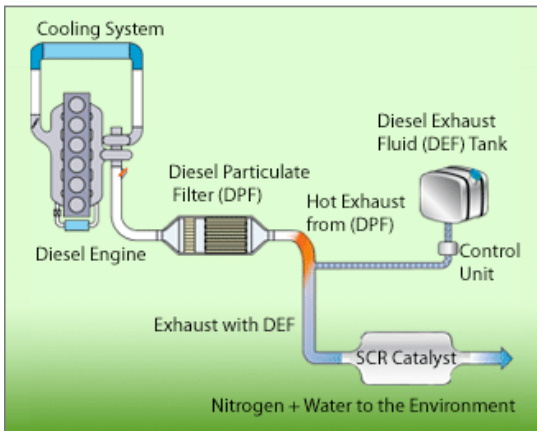
DIESEL PARTICULATE FILTER COMPONENTS Page 38

Background

Institution of U.S. 2007 EPA truck diesel emission standards resulted in nearly universal utilization of diesel particulate filters on medium and heavy duty trucks in North America. Volume of demand for these serviceable components on diesel-powered vehicles has more than doubled during the most recent 4 years.

Because the 2011 DataMac® survey was the first to request information on these components, this year's report is our first to identify trend in this product segment.

Schematic of a Selective Catalytic Reduction (SCR) System



DIESEL EXHAUST RECIRCULATION COMPONENTS

Background

2015 DataMac® reporting should be expanded to include, not only DPF components, but exhaust gas recirculation and selective catalytic reduction components, as well.

Since this DataMac® Operator Survey is the first to include questions about these components, there is no prior data available with which to compare current survey results. Consequently, this report will include only the 2015 findings of our survey of EGR and SCR components.



Brand Preference

Shock Absorbers

Among 2015 survey respondents who operate powered vehicles, owners of 47% of those vehicles are in fleets that specify ██████ brand of replacement shock absorbers. ██████ is also the preferred brand of replacement shock absorbers installed on 58% of trailers operated by respondents.

The ██████ brand of shocks is preferred by fleets that operate 12% of powered vehicles and 18% of trailers while the ██████ is the preference of 8% of operators of powered vehicles and 7% of trailer owners. The truck/trailer manufacturer’s brand of shock absorber is specified for 31% of power unit and 17% of trailer replacements.

Brand Preference

Shock Absorbers

	Powered Vehicles	Trailers
█████	8%	7%
█████	12%	18%
█████	47%	58%
████	2%	0%
██████████████	31%	17%
Total	100%	100%

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