

**2016
UNITED STATES
HEAVY DUTY PARTS
AFTERMARKET MONITOR
AND FORECAST SERVICE**



**MacKay
& Company**

TABLE OF CONTENTS

EXECUTIVE SUMMARY AND KEY OBSERVATIONS . . . . .	.6
Definition of Terms . . . . .	.7
2016 DataMac® Truck Enhancements . . . . .	.9
The Economy . . . . .	.10
2016 DataMac® Forecast Assumptions . . . . .	.11
Retail Sales . . . . .	.12
Populations and Average Vehicle Age . . . . .	.14
Average Annual Mileage . . . . .	.17
Utilization . . . . .	.18
Consolidated Model Impacts . . . . .	.19
Parts Pricing . . . . .	.20
Overall Industry Historical and Forecast Pricing . . . . .	.20
Product Category Changes 2014-2016 . . . . .	.21
Product Category Changes 2016-2017 . . . . .	.22
Historical, Detailed Price Impact . . . . .	.23
Market Share by Vocation . . . . .	.24
U.S. Replacement Demand 2014-2017 . . . . .	.25
U.S. Replacement Demand 2017-2021 . . . . .	.26
U.S. Replacement Demand 5-Year Trends. . . . .	.27
By Distribution Channel . . . . .	.27
By Type of Replacement . . . . .	.28
By Point of Service . . . . .	.29
RESPONDENT AND SURVEY PROFILE. . . . .	.30
2016 Survey Cycle –Surveyed Components . . . . .	.30
Respondent Profile By Vocation, Fleet Size . . . . .	.32

2016 DATAMAC SURVEYED COMPONENT DETAIL	33
ENGINE/POWER COOLING COMPONENTS	33
By Point of Service	33
Radiators – Aluminum	34
Point of Service	34
Type of Replacement	34
Current Replacement Demand	35
Point of Final Sale	36
Radiators – Copper/Brass.	37
Point of Service	37
Type of Replacement	37
Current Replacement Demand	38
Point of Final Sale	39
Charge Air Coolers.	40
Point of Service	40
Type of Replacement	40
Current Replacement Demand	41
Point of Final Sale	42
Brand Preference	43
Radiators & Charge Air Coolers.	43
DIESEL ENGINE FUEL SYSTEMS	44
Universe	44
Diesel Injection Pumps.	45
Point of Service	45
Type of Replacement	46
Current Replacement Demand	46
Point of Final Sale	47

2016 DATAMAC SURVEYED COMPONENT DETAIL (continued)

Diesel Fuel Feed Pumps	48
Point of Service	48
Type of Replacement	48
Current Replacement Demand	49
Point of Final Sale	50
Mechanical Fuel Injectors.	51
Point of Service	51
Type of Replacement	51
Current Replacement Demand	52
Point of Final Sale	53
Electronic Fuel Injectors.	54
Point of Service	54
Type of Replacement	54
Current Replacement Demand	55
Point of Final Sale	56
Point of Purchase Rationale.	57
Diesel Engine Filters.	58
Point of Service	58
Current Replacement Demand	59
Point of Final Sale	61
Brand Preference	62
Cabin Air Filters.	64
Point of Service	64
Current Replacement Demand	65
Point of Final Sale	66
Brand Preference	67
WHEEL HUBS, SEALS & BEARINGS	68
Background	68
Wheel Hubs	69
Point of Service	69
Point of Final Sale	70
Wheel End Universe.	71
Oil Bath Wheel Seal Universe.	71
Wheel Grease Seals – Type of Grease Used.	72
Steer and Trailer Axle – Type of Wheel Ends.	72

2016 DATAMAC SURVEYED COMPONENT DETAIL (continued)

Wheel Bearings	73
Point of Service	73
Current Replacement Demand	74
Point of Final Sale	75
Brand Shares.	76
Wheel Seals	77
Point of Service	77
Current Replacement Demand	78
Point of Final Sale	79
Brand Shares.	80
Hub Caps	81
Point of Service	81
Current Replacement Demand	82
Point of Final Sale	83
Brand Shares.	84
ABS AIR BRAKE SYSTEMS	85
Portion Of Vehicle Population	85
ABS Brake Electronic Controllers.	87
Point of Service	87
Current Replacement Demand	88
Point of Final Sale.	89
ABS Brake Modulator Valves.	90
Point of Service	90
Current Replacement Demand	91
Point of Final Sale	92
ABS Brake Wheel Speed Sensors	93
Point of Service	93
Current Replacement Demand	94
Point of Final Sale	95