

AAPEX 2019 FACT SHEET



NOVEMBER 5-7, 2019
Las Vegas, NV | Sands Expo
AAPEXSHOW.COM

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OFFICIAL NAME: Automotive Aftermarket Products Expo (AAPEX)

DESCRIPTION: AAPEX represents the more than \$1 trillion global automotive aftermarket industry and features 2,500 exhibiting companies and 5,500 booths. An extensive AAPEXedu includes Let's Tech presentations, Mobility Garage underhood and alternative fuel training, and interactive sessions on technology, international trade, the outlook for 2020 and more. Approximately 48,000 targeted buyers and more than 162,000 automotive aftermarket professionals from nearly 126 countries are projected to be in Las Vegas during AAPEX and the SEMA Show.

AAPEX CO-OWNERS: AAPEX is co-owned by the Auto Care Association and the Automotive Aftermarket Suppliers Association (AASA), the light vehicle aftermarket division of the Motor & Equipment Manufacturers Association (MEMA).

2019 DATES & LOCATION: Tuesday, Nov. 5 through Thursday, Nov. 7, at the Sands Expo in Las Vegas, Nevada, USA.

ATTENDEES: AAPEX attendees include auto parts retailers, auto parts warehouse distributors, jobbers, automotive service professionals, service chains, automotive dealers, engine builders, fleet buyers, paint and body personnel, and automotive aftermarket industry leaders and innovators.

EXHIBITORS: AAPEX exhibitors offer products and services in the following categories:

3D Printing	Car Care Accessories	Exhaust System	Refrigerants & Accessories	Telematics
Accessories: Exterior	Cargo Management	Filters	Remanufactured Parts & Components	Tire & Wheel Accessories
Accessories: Interior	Climate Control	Fluid Management & Accessories	Remote Diagnostics	Tool & Shop Storage
Air Fresheners	Collision Industry Segment	Fuel System Gaskets	Robotics	Towing & Hitch
Antifreeze/Coolant	Connected Car	Greases & Lubes	Sealants/Adhesives/Compounds	Transmission Fluid
Augmented Reality	Consumer Products & Services	Hand Care	Shop Equipment	Vehicle Computers: Engine Control Computers
Automated Warehouses	Cooling	Hand Tools	Shop Equipment: Light Duty	Vehicle Computers: Computers & Vehicles Components - Other
Autonomous Vehicles	Driveline	Ignition System	Shop Supplies & Other Products	Vehicle System Tools & Equipment
Batteries	Electrical	Lighting (Automotive)	Spark Plugs	Vehicles
Battery Accessories	Electrical: Application	Motor Oil	Steering	Washer Fluids
Big Data	Electrical: Rotating	Paint/Coatings	Suspension	Wiper Components
Body Repair	Emission Control/ Air Management	Performance Chemicals	Tape	Wipers
Brakes	Engine Parts/Components	Power Tools		
Business Products & Services		Process		

FUTURE DATES:

AAPEX 2020

Tuesday, Nov. 3 - Thursday, Nov. 5
Sands Expo | Las Vegas, Nevada, USA

AAPEX 2021

Tuesday, Nov. 2 - Thursday, Nov. 4
Sands Expo | Las Vegas, Nevada, USA

AUTOMOTIVE AFTERMARKET INDUSTRY ANALYSIS



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The **536,000** businesses in the U.S. automotive aftermarket industry form a coast-to-coast network of independent manufacturers, distributors, repair shops, marketers and retailers, small and large. At its core, this integrated grid of professionals is dedicated to providing the quality parts, products and vehicle service and repair for all 280 million cars and trucks on the road today.

GLOBAL STATISTICS

- More than **\$1 TRILLION** global automotive aftermarket industry
- Approximately **1.3 BILLION** vehicles on the road

U.S. STATISTICS

- **\$392 BILLION** U.S. automotive aftermarket industry (includes heavy duty)
- The aftermarket industry grows at an average of **3.4%** annually
- **2.4%** of the U.S. GDP generated by motor vehicle parts manufacturers
- Vehicle parts suppliers manufacture **77%** of the value in today's cars
- By 2022, experts predict there will be more than 87% of connected vehicles that will generate **\$14.5 BILLION** in revenue in automotive data assets
- Represents **2.9%** of total U.S. employment
- Motor vehicle parts suppliers are the largest sector of manufacturing jobs in the U.S.: **871,000 DIRECT JOBS** and total employment impact of **4.26 MILLION JOBS**
- Average wages and benefits = **\$80,000**
- Average age of vehicles = **11.8 YEARS**
- Vehicles 16 years or older will increase **22%** by 2023
- **221 MILLION** licensed drivers
- **70%** DIFM (Do It For Me); **30%** DIY (Do It Yourself)
- Of the 70% DIFM, **70%** of consumers prefer independent shops for repair and service as compared to new car dealers.
- **27,601** parts classifications represent more than **14,957** brands in the industry
- **264,993** retail parts outlets
- e-Tailing, or parts sold over the Internet, is projected to reach a CAGR of **9%** in the DIY and **10%** in the DIFM markets for the 2017-2020 period.
- **896,500** technicians

Sources: Auto Care Association Factbook 2019. Full report available at www.autocare.org. MEMA: The Economic Impact of the Motor Vehicle Parts Manufacturing Industry on the United States (August 2016), more information at www.mema.org. AASA and Auto Care Association 2018 Joint Channel Forecast Model, conducted by IHS Markit, more information at www.aftermarketsuppliers.org and www.autocare.org. Also cited: IHS 5 Trends in 5 Minutes and AASA Aftermarket Size & Forecast Report (2018).

AAPEX 2019

LEADERSHIP BIOS



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BILL HANVEY

President and CEO

Auto Care Association

William J. "Bill" Hanvey is president and CEO of the Auto Care Association, which represents the entire \$392 billion independent automotive aftermarket supply chain.

Since becoming president and CEO on Dec. 1, 2015, Hanvey has structured the association under five core pillars, including the advancement of data and technology usage in the auto care industry, and the alignment of his team in order to meet both current and future needs of the Auto Care Association membership. On a daily basis, Hanvey utilizes his prior professional experience in the areas of marketing, sales, product management and pricing to prioritize evaluating the needs of an evolving industry and providing the benefits and legislative representation that members seek.

Most recently, Hanvey served as senior vice president of the Automotive Aftermarket Suppliers Association (AASA), a division of the Motor Equipment Manufacturers Association (MEMA), beginning in 2012. At AASA, he managed their headquarters operations while advocating for North American parts manufacturers to the auto care industry, federal and state government agencies, and the business community.

Hanvey has spent his entire 30+ year career in the aftermarket. After earning his bachelor's degree in mass communications and public relations at St. Bonaventure University, he began his career as a field sales representative with Tenneco Automotive and progressed through increasingly more responsible positions in product management and marketing within the company. He finished his career at Tenneco as the Ride Control Product Director, where he led the product and marketing teams for North America. Hanvey then became the first marketing director for FleetPride®, where he developed and executed a strategic marketing and branding plan integrating 37 separately-owned companies into what is now the nation's largest independent heavy-duty parts distributor.

Hanvey went on to become vice president, marketing, Dorman Products, Inc., where he led initiatives to rebrand the company, and developed the OE Solutions® brand which provides the independent aftermarket solutions that were previously only available at the OE dealer. Hanvey then became vice president, sales and marketing, Schaeffer Group USA, leading the North American aftermarket team while developing and implementing a new company strategic direction, transitioning its sales and product focus from co-man to direct sales.

Hanvey served as chairman of the Auto Care Association Marketing and Communications Committee and was staff liaison for the Brake Manufacturer's and Marketing Executive's councils while at AASA.

Hanvey was awarded the Northwood University Educator of the Year Award in 2014, and serves on The University of The Aftermarket Foundation, The Automotive Aftermarket Charitable Foundation (AACF) and The Coalition for Automotive Repair Equality (CARE) boards.

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PAUL T. McCARTHY

President and Chief Operating Officer

Automotive Aftermarket Suppliers Association (AASA)

Paul McCarthy assumed the position of president and chief operating officer of Automotive Aftermarket Suppliers Association (AASA), the light vehicle aftermarket division of the Motor & Equipment Manufacturers Association (MEMA), in July 2019. As AASA's top executive, he is focused on its mission – to champion the aftermarket industry and the business interests of its members – and its vision to support a high-growth, profitable, innovative and influential aftermarket supplier industry.

McCarthy comes up through AASA's top leadership. He served nearly three years as second in command and executive vice president to AASA's previous president and COO Bill Long, who in February 2019 was named president and chief executive officer of MEMA, the parent organization of AASA, Heavy Duty Manufacturers Association (HDMA), MERA - the Association for Sustainable Manufacturing and Original Equipment Suppliers Association (OESA). Paul also served as senior vice president, strategy, for MEMA. In this role, he reported to MEMA's CEO and his responsibilities include leading strategic and business planning; formulating and executing strategic initiatives; board management; and leading MEMA's industry analysis and thought leadership efforts.

Paul has a quarter century's experience in the automotive industry. Prior to joining MEMA, Paul led the Automotive and Industrial Products Strategy Practice at PricewaterhouseCoopers (PwC). He consulted at dozens of automotive suppliers, eight of the top ten global automakers, and at private equity firms and financial institutions. He was PwC's leading global automotive industry subject matter expert, and his analysis has been cited in *The Financial Times*, *Wall Street Journal*, *Bloomberg*, *Reuters*, *Handelsblatt*, *Frankfurter Allgemeine*, *Les Echos*, *Automotive News* and other publications.

Paul's areas of expertise include team and business leadership, strategic and business planning, M&A strategy and strategic due diligence, market forecasting, market entry strategy, competitive assessment, product planning, location selection and technology projections.

His past leadership roles include heading PwC Germany's Automotive Strategy advisory practice and leading global forecasting and analysis for a prominent vehicle forecast service, Autofacts.

Paul has an MBA from Duke's University's Fuqua School of Business, where he was awarded the Fuqua Scholar designation. He has a B.A. from the University of Delaware.

AAPEX 2019 TECHNOLOGY



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TECHNOLOGY AT AAPEX

Many exhibitors spotlight and demo new technology in their booths. AAPEX also has designated technology-focused areas, programs and product displays.

MOBILITY GARAGE: Products and Training for Tomorrow

Mobility Garage features hands-on training and new products and tools in two dedicated sections: Electric Car and Alternative Fuel/Energy and Shop Equipment and Technology. Training sessions include preparing technicians for the next generation of electric vehicles, understanding hybrid vehicle systems, security technology, electrical system training methods, new inspection guidelines for natural gas vehicle fleets, new ASE programs and certification, and more. Exhibitors also display their newest products and preview soon-to-be released products in this specialized area.

Mobility Garage is located on Level 2, Titian Ballroom, The Venetian.

TECHNOLOGY OF TOMORROW

Technology of Tomorrow is the place to view products that are still in the prototype phase and set to hit the market in the next three-to-five years. Exhibitors include FenSens with its Smart Solar Powered Backup Camera, Sensata and its SMART Sensors enabled by vehicle connectivity and HUECORE, Inc. This section also features demo implementations of the Secure Vehicle Interface (SVI) and insight on the work that the Auto Care Association is conducting for the standardization of advanced driver assistance systems (ADAS) calibration and equitable access to Embedded Device Software (EDS) on behalf of the aftermarket.

AAPEX Technology of Tomorrow is located in The Venetian Ballroom, Level 2.

AUTOMOTIVE TECHNOLOGY SECTION

In the Automotive Technology section on the show floor, exhibitors will spotlight mobility technology, advances in recycling, evolving technologies in repair, advanced driver assistance systems (ADAS), digital inspections and integrated management systems.

The Automotive Technology section is located at the Sands Expo, Level 2.

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AAPEXEDU ADAS FORUM AND TECHNOLOGY-FOCUSED SESSIONS

AAPEX 2019 is hosting a three-hour advanced driver assistance systems (ADAS) Forum to prepare auto repair shops for the opportunities and challenges of servicing ADAS-equipped vehicles. The Forum also includes a presentation on who is liable when ADAS systems are not calibrated properly, and a look at the next-generation of ADAS recalibration tools and techniques. The Forum will take place from 9:30 a.m. - 12:30 p.m., Nov. 7, in the Bellini Ballroom, The Venetian.

AAPEXedu also is offering technology-focused sessions, including Innovative End-of-Life Strategies for Emerging Technologies in a Changing World (1 p.m. - 2 p.m., Nov. 5, Bellini Ballroom, The Venetian); Your Car. Your Data. Your Choice. Presents Cybersecurity and the Connected Car: Challenges and Opportunities (1:30 p.m. - 2:30 p.m., Nov. 6, Let's Tech Stage); Automotive Aftermarket Online-to-Offline (o2o) Pulse Check (2:30 p.m. - 3:30 p.m., Nov. 6, Bellini Ballroom, The Venetian).

LET'S TECH

Technology and industry experts, as well as technical trainers will take the Let's Tech stage to deliver quick learning presentations on new products, technologies and trends and their impact on automotive aftermarket businesses. Presentations are modeled after the popular TED Talks, with Let's Tech speakers delivering short, powerful information in 20 minutes or less. Topics include communicating with customers, tire mounted sensors, braking with ADAS, transparency and trust, nano-technology and the future of lubrication, inventory assortment recommendations, vehicle security and VehicleMRI technology.

Let's Tech is located at the Sands Expo, Level 2 Upper Lobby.

VIRTUAL VEHICLE CHALLENGE

The Virtual Vehicle Challenge returns this year! Attendees will have the opportunity to virtually install parts in a vehicle and compete for the best time. Daily winners with the fastest time receive free AAPEX 2020 registration and housing for up to four nights. New in 2019, selected cars also will race on the Virtual Vehicle Track.

The Virtual Vehicle Challenge is located in the Sands Expo main lobby on Level 2.

TECHNOLOGY-FOCUSED NEW PRODUCTS AND PACKAGING

The AAPEX New Product Showcase is the best place to see technology-focused new products that are making their debut at AAPEX. The AAPEX New Packaging Showcase spotlights the latest and most innovative packaging designs and concepts.

Both showcases are located at The Venetian, Level 2 hallway.

#AAPEX19

SOCIAL MEDIA, AAPEX TV AND THE AAPEX BLOG



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For the latest news about the many new programs underway for this year's event, follow AAPEX at #AAPEX19 on social media, watch our monthly videos on **AAPEX TV-360** (www.aapextv.com) and read our **AAPEX Blog** on the AAPEX website (www.aapexshow.com/blog).



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