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Canadian Consulate General - Boston

**Market Opportunity Assessment:
The New England Auto Aftermarket for
Canadian Parts & Accessories Companies**

Background Findings

November 6, 1992

Spectrum Boston Consulting, Inc.
85 Chestnut Street
Boston, MA 02108
Phone (617) 367-1008 Fax 617 (617) 367-5824

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Federal Reserve Report
First District - Boston

- Mid-year (1992) lull after 1st quarter sales increase
- Housing activity increases
- Auto sales show no improvement.
- Manufacturers report sales & orders are equal to or slightly above 1991 levels.
- 1/2 consumers believe the economy is recovering.
1/2 attribute sales improvement to retailers' discounting activity.
- Lower interest rates have lessened inventory carrying costs.
- Boston area tourism (visitor totals) are above last summer's levels.
- Hotel occupancy rates are up.
- Used car market is strong at the expense of new cars.
- Residential real estate sales stronger than 1 year ago, helped by lower interest rates.
- 1/2 of all manufacturers expect unemployment to increase.

Manufacturing Unemployment (Source: Bureau of Labor Statistics)

	<u>1990</u>	<u>1991</u>
U.S. (Total)	5.8%	7.2%
1. Connecticut	5.6%	6.5%
2. Maine	5.7%	7.4%
3. Massachusetts	6.4%	9.9%
4. New Hampshire	5.6%	7.6%
5. Rhode Island	8.0%	9.8%
6. Vermont	4.1%	7.7%

***Consumer Price Index**

	<u>1990</u>	<u>1991</u>
U.S. Total	130.7	136.2
Boston area	138.9	145.0

* Based on 1982-1984 = 100.

TOTAL HOUSING STARTS BY REGION AND DIVISION, 1990-1993

(000)

	ANNUAL				SEASONALLY ADJUSTED ANNUAL RATE											
					1991				1992				1993			
	1990	1991	1992	1993	I	II	III	IV	I	II	III	IV	I	II	III	IV
UNITED STATES	1,193	1,014	1,280	1,425	924	1,000	1,042	1,096	1,250	1,212	1,307	1,340	1,364	1,416	1,448	1,471
NORTHEAST REGION	131	113	132	136	94	118	108	131	139	128	130	130	132	135	137	140
Percent of U.S.	11.0%	11.1%	10.3%	9.6%	10.2%	11.8%	10.4%	12.0%	11.0%	10.6%	9.9%	9.7%	9.7%	9.6%	9.5%	9.5%
NEW ENGLAND	39.2	33.3	38.9	42.2	27.3	34.5	31.3	40.8	41.2	37.4	37.9	39.0	40.6	41.8	42.7	43.8
Percent of U.S.	3.3%	3.3%	3.0%	3.0%	3.0%	3.5%	3.0%	3.7%	3.3%	3.1%	2.9%	2.9%	3.0%	3.0%	2.9%	3.0%
MIDDLE ATLANTIC	91.8	79.7	92.9	94.0	67.0	83.1	78.8	90.2	97.8	90.6	91.9	91.2	91.3	93.6	94.8	96.3
Percent of U.S.	7.7%	7.9%	7.3%	6.6%	7.3%	8.3%	7.4%	8.2%	7.8%	7.5%	7.0%	6.8%	6.7%	6.6%	6.5%	6.5%
SOUTH REGION	479	414	518	582	382	385	434	463	500	498	527	546	558	577	592	601
Percent of U.S.	40.2%	40.8%	40.5%	40.9%	41.3%	38.5%	41.8%	42.2%	39.7%	41.1%	40.3%	40.7%	40.9%	40.8%	40.9%	40.9%
SOUTH ATLANTIC	329.0	265.6	339.5	382.3	254.0	256.9	283.5	299.3	328.2	324.0	348.3	359.6	366.4	380.1	388.3	394.4
Percent of U.S.	27.6%	26.2%	26.5%	26.8%	27.5%	25.7%	27.2%	27.3%	25.9%	26.7%	26.7%	26.8%	26.9%	26.8%	26.8%	26.8%
EAST SOUTH CENTRAL	67.5	60.7	77.5	82.9	56.2	58.2	65.4	69.6	76.8	74.7	78.0	80.5	81.5	82.0	83.8	84.2
Percent of U.S.	5.7%	6.0%	6.1%	5.8%	6.1%	5.8%	6.3%	6.4%	6.1%	6.2%	6.0%	6.0%	6.0%	5.8%	5.8%	5.7%
WEST SOUTH CENTRAL	83.9	87.8	100.8	116.9	71.8	69.9	84.8	93.8	97.2	99.3	100.9	105.8	110.2	114.6	119.9	122.7
Percent of U.S.	7.0%	8.7%	7.9%	8.2%	7.8%	7.0%	8.1%	8.6%	7.7%	8.2%	7.7%	7.9%	8.1%	8.1%	8.3%	8.3%
MIDWEST REGION	253	233	314	327	232	231	234	239	329	300	313	315	316	324	332	336
Percent of U.S.	21.2%	23.0%	24.6%	22.9%	25.1%	23.1%	22.5%	21.8%	26.2%	24.8%	24.0%	23.5%	23.2%	22.9%	22.9%	22.8%
EAST NORTH CENTRAL	183.6	162.3	213.6	225.7	159.9	156.1	160.1	167.4	224.1	203.7	212.8	214.2	217.2	223.9	229.6	232.1
Percent of U.S.	15.4%	16.0%	16.7%	15.8%	17.3%	15.6%	15.4%	15.3%	17.8%	16.8%	16.3%	16.0%	15.9%	15.8%	15.9%	15.8%
WEST NORTH CENTRAL	69.6	71.7	100.8	101.3	71.8	75.2	73.9	71.3	105.3	96.3	100.9	100.8	99.3	100.1	102.2	103.6
Percent of U.S.	5.8%	7.1%	7.9%	7.1%	7.8%	7.5%	7.1%	6.5%	8.4%	7.9%	7.7%	7.5%	7.3%	7.1%	7.1%	7.0%
WEST REGION	329	254	315.4	379.6	216	208	266	264	291	288	336	349	358	379	387	394
Percent of U.S.	27.6%	25.0%	24.7%	26.6%	23.4%	26.6%	25.5%	24.1%	23.1%	23.6%	25.7%	26.0%	26.2%	26.8%	26.7%	26.8%
MOUNTAIN	85.0	84.0	106.4	125.4	66.7	69.8	90.1	88.3	98.2	100.6	110.9	116.0	116.1	125.1	127.5	129.7
Percent of U.S.	7.2%	8.3%	8.3%	8.8%	7.2%	9.0%	8.6%	8.1%	7.8%	8.3%	8.5%	8.7%	8.7%	8.8%	8.8%	8.8%
PACIFIC	244.5	168.5	209.0	254.2	149.3	175.9	175.9	175.4	192.8	185.4	225.2	232.9	238.5	254.2	259.6	264.7
Percent of U.S.	20.5%	16.6%	16.3%	17.8%	16.2%	17.6%	16.9%	16.0%	15.3%	15.3%	17.2%	17.4%	17.5%	18.0%	17.9%	18.0%

30-Jun-92

SINGLE FAMILY STARTS BY REGION AND DIVISION, 1990-1993

(000)

	ANNUAL				SEASONALLY ADJUSTED ANNUAL RATE											
					1991				1992				1993			
	1990	1991	1992	1993	I	II	III	IV	I	II	III	IV	I	II	III	IV
UNITED STATES	895	840	1,080	1,171	733	834	875	922	1,055	1,031	1,108	1,125	1,143	1,161	1,187	1,193
NORTHEAST REGION	104	99	121	121	78	102	97	119	125	120	120	118	120	121	122	123
Percent of U.S.	11.6%	11.8%	11.2%	10.4%	10.6%	12.2%	11.1%	12.9%	11.9%	11.7%	10.9%	10.5%	10.5%	10.4%	10.2%	10.3%
NEW ENGLAND	31.4	30.6	37.2	39.3	23.0	31.8	28.7	38.7	39.0	36.5	36.8	36.4	38.0	39.1	39.6	40.6
Percent of U.S.	3.5%	3.6%	3.4%	3.4%	3.1%	3.8%	3.3%	4.2%	3.7%	3.5%	3.3%	3.2%	3.3%	3.4%	3.3%	3.4%
MIDDLE ATLANTIC	72.6	68.2	83.9	82.1	54.7	70.3	68.0	79.8	86.3	84.0	83.7	81.5	81.6	82.0	82.0	82.6
Percent of U.S.	8.1%	8.1%	7.8%	7.0%	7.5%	8.4%	7.8%	8.7%	8.2%	8.1%	7.6%	7.3%	7.1%	7.1%	6.9%	6.9%
SOUTH REGION	372	353	438	485	306	337	372	393	426	426	443	458	470	480	494	497
Percent of U.S.	41.6%	42.0%	40.6%	41.4%	41.8%	40.4%	42.5%	42.7%	40.4%	41.3%	40.0%	40.7%	41.2%	41.3%	41.6%	41.6%
SOUTH ATLANTIC	247.8	224.4	283.1	309.5	193.1	218.0	238.2	250.3	277.6	273.1	286.1	295.6	300.7	306.1	314.6	318.4
Percent of U.S.	27.7%	26.7%	26.2%	26.4%	26.3%	26.1%	27.0%	27.2%	26.3%	26.5%	25.8%	26.3%	26.3%	26.4%	26.5%	26.5%
EAST SOUTH CENTRAL	53.1	54.0	67.4	71.3	47.2	52.3	57.3	59.1	69.9	64.5	66.6	68.8	70.5	70.9	72.1	71.9
Percent of U.S.	5.9%	6.4%	6.2%	6.1%	6.4%	6.3%	6.6%	6.4%	6.6%	6.3%	6.0%	6.1%	6.2%	6.1%	6.1%	6.0%
WEST SOUTH CENTRAL	71.5	73.7	87.5	104.4	65.8	66.7	78.2	84.0	78.0	87.9	90.6	93.4	99.1	102.7	107.2	108.6
Percent of U.S.	8.0%	8.8%	8.1%	8.9%	9.0%	8.0%	8.9%	9.1%	7.4%	8.5%	8.2%	8.3%	8.7%	8.8%	9.0%	9.1%
MIDWEST REGION	193	191	264	264	180	191	192	203	271	258	266	202	264	263	265	265
Percent of U.S.	21.6%	22.7%	24.5%	22.6%	24.6%	23.0%	22.0%	22.0%	25.7%	25.1%	24.0%	23.4%	23.1%	22.6%	22.3%	22.2%
EAST NORTH CENTRAL	138.5	129.4	177.7	179.3	121.5	126.4	129.2	140.5	162.7	173.3	170.0	176.8	178.3	178.6	179.8	180.5
Percent of U.S.	15.5%	15.4%	16.5%	15.3%	16.6%	15.2%	14.8%	15.2%	17.3%	16.8%	16.1%	15.7%	15.6%	15.4%	15.2%	15.1%
WEST NORTH CENTRAL	54.8	62.2	86.8	85.0	58.4	65.0	63.3	62.3	67.9	65.1	68.4	65.7	65.6	64.3	65.2	65.0
Percent of U.S.	6.1%	7.4%	8.0%	7.3%	8.0%	7.8%	7.2%	6.8%	8.3%	8.3%	8.0%	7.6%	7.5%	7.3%	7.2%	7.1%
WEST REGION	226	197	256	302	169	203	214	207	232	227	278	286	289	298	306	308
Percent of U.S.	25.3%	23.5%	23.7%	25.8%	23.1%	24.4%	24.5%	22.5%	22.0%	22.0%	25.1%	25.4%	25.3%	25.6%	25.8%	25.8%
MOUNTAIN	66.9	70.6	90.4	106.5	56.8	75.2	77.1	73.5	83.4	80.3	97.0	101.0	102.8	105.6	108.5	108.9
Percent of U.S.	7.5%	8.4%	8.4%	9.1%	7.7%	9.0%	8.8%	8.0%	7.9%	7.8%	8.8%	9.0%	9.0%	9.1%	9.1%	9.1%
PACIFIC	160.0	127.7	165.1	193.7	112.4	128.0	136.8	133.7	148.9	146.4	180.7	184.5	186.2	192.1	197.9	188.8
Percent of U.S.	17.9%	15.2%	15.3%	16.5%	15.3%	15.4%	15.8%	14.8%	14.1%	14.2%	16.3%	16.4%	16.3%	16.8%	16.7%	16.7%

TOTAL HOUSING UNITS AUTHORIZED BY PERMITS (000s)

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
UNITED STATES	1,190.60	985.53	1,000.49	1,605.22	1,681.82	1,733.27	1,769.44	1,534.77	1,455.82	1,338.42	1,104.41	981.40
NORTHEAST REGION	117.88	109.85	106.66	164.06	200.76	259.71	283.26	271.80	230.16	178.06	123.76	111.79
NEW ENGLAND	41.08	38.59	38.18	57.04	72.80	99.19	112.27	103.34	80.72	54.40	38.32	31.13
Connecticut	10.09	9.32	10.28	15.67	17.78	24.55	27.73	26.75	18.87	11.97	7.56	7.63
Maine	3.41	2.52	3.15	4.16	6.57	8.11	9.55	9.80	8.80	6.38	4.30	3.39
Massachusetts	16.48	18.67	15.44	22.84	29.29	39.20	45.22	40.42	30.48	21.26	15.14	12.88
New Hampshire	5.28	4.37	4.51	7.73	11.05	17.77	18.02	14.56	11.69	7.26	3.98	2.94
Rhode Island	2.91	3.14	2.60	3.77	4.21	5.41	7.27	7.20	6.07	3.87	3.04	2.38
Vermont	2.92	2.57	2.21	2.88	3.60	4.18	4.48	4.61	4.81	3.64	2.30	1.94
MIDDLE ATLANTIC	76.80	71.26	68.48	107.01	127.97	160.52	170.99	168.45	149.46	124.55	87.44	80.66
New Jersey	22.27	20.68	21.30	35.00	43.82	55.03	57.35	51.46	40.91	30.34	19.39	16.01
New York	24.49	26.23	24.98	37.91	44.73	61.93	60.20	62.19	54.72	48.74	32.07	28.07
Pennsylvania	30.04	24.35	22.20	33.21	39.42	43.57	53.44	54.80	53.83	45.48	35.98	36.58
SOUTH REGION	561.87	491.07	543.46	862.94	812.10	752.63	686.50	574.66	543.51	505.27	424.51	379.29
SOUTH ATLANTIC	333.12	281.51	249.71	437.63	479.31	492.28	488.23	438.67	423.15	390.32	309.91	260.39
Delaware	2.90	2.30	2.97	3.63	4.36	4.64	5.53	7.08	7.42	6.76	5.17	4.30
Dist. of Columbia	2.66	0.98	0.43	0.16	0.39	0.59	0.64	1.20	0.85	0.41	0.37	0.33
Florida	174.25	146.16	103.81	188.99	204.88	202.82	195.53	178.78	170.60	164.99	126.93	96.49
Georgia	34.84	30.00	38.74	65.91	70.28	73.14	76.90	64.22	63.02	50.46	41.37	38.52
Maryland	20.03	16.99	20.96	30.62	38.52	42.14	42.38	41.13	39.57	40.59	34.47	26.63
North Carolina	35.51	34.11	33.09	53.95	62.69	70.73	63.00	54.27	50.32	46.35	40.59	40.32
South Carolina	22.33	18.92	18.01	29.77	35.89	32.82	26.84	23.52	23.10	21.20	18.49	18.14
Virginia	37.29	29.68	29.88	53.77	60.21	64.12	73.51	66.65	66.49	56.88	40.58	33.64
West Virginia	3.33	2.38	1.82	1.83	2.10	1.48	1.92	1.86	1.78	1.69	1.95	2.02
EAST SOUTH CENTRAL	54.84	34.61	37.21	65.17	76.64	77.89	75.33	64.30	61.34	55.59	51.16	47.82
Alabama	15.91	9.87	8.69	17.33	15.31	17.24	19.18	14.52	12.77	12.04	12.26	10.46
Kentucky	10.19	7.81	7.51	11.68	13.04	13.77	13.50	13.22	13.36	12.66	11.96	11.62
Mississippi	9.36	5.46	6.21	9.62	11.52	8.76	8.29	6.63	7.40	6.64	5.40	4.62
Tennessee	19.39	11.68	14.80	26.55	36.76	38.13	34.38	29.92	27.80	24.24	21.55	21.14
WEST SOUTH CENTRAL	173.91	174.95	256.55	360.14	256.15	182.49	124.94	71.70	59.03	59.36	63.44	71.08
Arkansas	6.16	4.59	6.33	9.99	9.73	9.94	8.72	6.48	8.23	6.34	6.13	6.95
Louisiana	20.51	19.63	20.32	33.85	28.07	18.77	10.50	8.52	7.27	6.12	5.88	7.04
Oklahoma	17.69	14.97	28.74	40.08	22.93	10.67	8.98	6.25	5.05	5.62	4.85	5.54
Texas	127.55	135.76	201.16	276.22	195.43	143.11	96.74	50.46	40.48	41.29	46.58	51.55

SINGLE FAMILY UNITS AUTHORIZED BY PERMITS (000s)

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
UNITED STATES	710.39	584.31	548.43	901.48	922.45	958.80	1,077.60	1,024.37	993.77	931.88	798.87	760.13
NORTHEAST REGION	75.73	65.71	65.73	112.32	141.21	173.50	203.76	194.00	168.03	129.87	96.34	93.42
NEW ENGLAND	26.12	23.61	24.34	41.40	51.70	65.38	75.86	70.05	64.78	39.22	27.97	27.15
Connecticut	6.21	5.52	6.40	11.68	13.29	16.78	20.49	18.08	12.78	8.01	6.52	6.86
Maine	2.21	2.04	2.18	3.22	4.35	5.67	6.80	7.23	6.84	5.23	3.65	3.17
Massachusetts	10.51	10.27	9.85	16.69	21.18	25.59	28.11	25.31	20.11	14.52	11.14	11.52
New Hampshire	3.68	2.97	3.04	5.32	7.21	10.50	12.27	10.88	7.71	5.54	3.26	2.80
Rhode Island	1.71	1.38	1.33	2.64	3.04	3.99	4.70	4.80	3.68	2.90	2.39	2.05
Vermont	1.79	1.44	1.54	1.87	2.62	2.86	3.48	3.74	3.70	3.02	2.01	1.75
MIDDLE ATLANTIC	49.81	42.09	41.39	70.93	89.52	108.13	127.90	123.95	111.24	90.46	68.37	66.27
New Jersey	14.78	12.33	14.01	25.64	32.52	39.22	42.61	36.50	28.45	20.88	14.81	13.47
New York	14.42	13.88	12.96	20.81	26.84	34.29	41.32	41.67	37.50	31.92	22.78	21.70
Pennsylvania	20.41	15.88	14.43	24.58	30.16	34.62	43.97	45.78	45.29	37.65	30.79	31.11
SOUTH REGION	333.03	270.74	281.11	443.05	432.28	428.85	443.23	413.13	391.65	361.51	317.88	311.72
SOUTH ATLANTIC	204.80	161.46	158.26	269.68	281.91	296.70	317.13	305.32	298.38	270.77	226.76	213.67
Delaware	2.35	1.75	1.53	2.53	2.76	3.35	4.21	4.99	5.89	4.64	4.18	3.80
Dist. of Columbia	0.48	0.09	0.03	0.05	0.09	0.15	0.14	0.29	0.28	0.09	0.18	0.08
Florida	88.82	69.16	66.45	100.02	103.07	104.64	110.02	113.13	110.32	107.05	82.89	72.66
Georgia	25.34	19.89	25.22	40.52	43.56	45.87	50.71	46.42	42.58	35.16	33.34	34.79
Maryland	16.45	13.71	16.87	30.45	30.08	34.29	34.32	33.64	33.29	29.75	25.71	22.65
North Carolina	25.20	22.06	21.38	33.95	38.46	41.72	42.73	40.86	39.47	35.32	32.73	33.86
South Carolina	15.59	11.03	11.01	17.76	19.03	18.74	19.13	18.52	17.09	16.87	15.43	14.67
Virginia	29.06	22.50	23.00	43.24	43.54	46.83	54.43	46.15	48.20	40.54	30.81	29.58
West Virginia	1.50	1.28	0.97	1.15	1.31	1.11	1.44	1.33	1.30	1.36	1.50	1.58
EAST SOUTH CENTRAL	32.54	20.23	19.58	32.98	34.66	39.45	47.03	46.54	42.94	39.71	39.05	39.94
Alabama	8.97	5.05	4.70	8.55	8.22	9.93	11.52	10.85	9.67	8.50	8.02	8.09
Kentucky	5.95	4.02	4.11	6.00	6.20	6.35	8.04	9.03	8.96	8.88	8.69	9.07
Mississippi	5.29	3.63	3.44	4.88	6.47	5.86	5.86	5.18	4.92	4.70	4.16	4.06
Tennessee	12.33	7.53	7.33	13.55	13.77	17.31	21.61	21.09	19.40	17.84	18.17	18.73
WEST SOUTH CENTRAL	95.69	89.05	105.28	140.40	115.71	92.70	79.07	61.26	50.33	51.02	52.07	58.12
Arkansas	4.92	2.80	2.23	4.21	4.54	5.22	5.08	5.04	4.70	4.56	4.88	4.86
Louisiana	11.94	10.63	11.35	17.65	14.99	11.13	8.59	7.07	6.43	5.20	5.38	6.75
Oklahoma	11.61	10.11	14.28	17.71	11.63	7.02	6.30	5.20	4.33	4.63	4.37	5.39
Texas	67.22	65.51	77.42	100.83	84.56	69.32	59.12	43.95	35.88	36.83	37.44	41.13

Construction contracts in 1991

Millions of current dollars, 11-month cumulative figures, 1991 vs. 1990

Region and states	Heavy & highway			Building (excl. houses)			Total (excl. houses)		
	1990	1991	% chg.	1990	1991	% chg.	1990	1991	% chg.
U.S. TOTALS	47,037	44,975	- 4	104,508	86,914	- 17	151,545	131,889	- 13
Northeast	9,344	9,484	+ 1	20,432	16,069	- 21	29,776	25,553	- 14
Connecticut	638	631	- 1	1,627	1,242	- 24	2,265	1,873	- 17
Maine	219	164	- 25	226	205	- 10	445	368	- 17
Massachusetts	1,149	1,418	+ 23	2,371	1,591	- 33	3,520	3,009	- 15
New Hampshire	133	176	+ 33	454	250	- 45	587	426	- 27
New Jersey	1,329	1,905	+ 43	3,394	2,642	- 22	4,723	4,547	- 4
New York	3,373	3,016	- 11	7,566	5,630	- 26	10,940	8,646	- 21
Pennsylvania	2,323	1,827	- 21	4,425	4,109	- 7	6,748	5,935	- 12
Rhode Island	108	192	+ 78	210	250	+ 19	318	442	+ 39
Vermont	72	155	+ 114	158	151	- 5	231	306	+ 33
North Central	10,345	9,475	- 8	23,957	18,925	- 21	34,311	28,400	- 17
Illinois	1,796	1,612	- 10	5,334	3,655	- 31	7,130	5,267	- 26
Indiana	1,141	811	- 29	2,713	1,795	- 34	3,853	2,606	- 32
Iowa	628	736	+ 17	750	808	+ 8	1,379	1,544	+ 12
Kansas	515	517	+ 0	772	748	- 3	1,287	1,265	- 2
Michigan	1,219	1,185	- 3	3,711	2,918	- 21	4,930	4,103	- 17
Minnesota	773	625	- 19	2,158	1,604	- 26	2,931	2,229	- 24
Missouri	709	961	+ 36	1,611	1,345	- 17	2,320	2,306	- 1
Nebraska	324	361	+ 11	507	341	- 33	831	702	- 16
North Dakota	183	137	- 25	191	192	+ 1	374	330	- 12
Ohio	2,024	1,669	- 18	3,983	3,814	- 4	6,007	5,483	- 9
South Dakota	98	84	- 14	196	114	- 42	294	198	- 33
Wisconsin	933	777	- 17	2,042	1,591	- 22	2,975	2,367	- 20
South Atlantic	7,870	7,397	- 6	20,446	17,200	- 16	28,316	24,597	- 13
Delaware	160	140	- 12	315	364	+ 15	475	505	+ 6
District of Columbia	167	130	- 22	578	440	- 24	745	570	- 24
Florida	1,763	2,368	+ 34	7,256	5,753	- 21	9,020	8,122	- 10
Georgia	1,189	1,113	- 6	2,785	2,206	- 21	3,974	3,319	- 16
Maryland	1,247	766	- 39	2,394	2,100	- 12	3,641	2,866	- 21
North Carolina	780	942	+ 21	2,642	2,380	- 10	3,422	3,322	- 3
South Carolina	512	507	- 1	1,509	1,329	- 12	2,021	1,836	- 9
Virginia	1,267	1,094	- 14	2,740	2,347	- 14	4,007	3,441	- 14
West Virginia	785	336	- 57	226	280	+ 24	1,011	616	- 39
South Central	7,680	7,704	+ 0	11,847	12,255	+ 3	19,528	19,959	+ 2
Alabama	693	465	- 33	1,106	1,021	- 8	1,799	1,485	- 17
Arkansas	319	442	+ 38	475	503	+ 6	794	945	+ 19
Kentucky	644	942	+ 46	1,121	1,340	+ 20	1,765	2,282	+ 29
Louisiana	1,086	980	- 10	1,358	947	- 30	2,444	1,927	- 21
Mississippi	447	509	+ 14	555	788	+ 42	1,002	1,297	+ 29
Oklahoma	622	543	- 13	795	688	- 13	1,417	1,231	- 13
Tennessee	709	863	+ 22	1,733	1,294	- 25	2,442	2,157	- 12
Texas	3,159	2,960	- 6	4,705	5,674	+ 21	7,864	8,634	+ 10
West	11,797	10,916	- 7	27,817	22,464	- 19	39,614	33,380	- 16
Alaska	1,477	314	- 79	297	190	- 36	1,773	504	- 72
Arizona	987	854	- 13	1,607	1,224	- 24	2,594	2,078	- 20
California	4,749	5,124	+ 8	16,896	12,343	- 27	21,645	17,467	- 19
Colorado	862	1,206	+ 40	1,050	1,519	+ 45	1,912	2,725	+ 43
Hawaii	521	473	- 9	1,341	1,529	+ 14	1,862	2,001	+ 7
Idaho	123	175	+ 43	310	248	- 20	433	423	- 2
Montana	120	155	+ 29	108	162	+ 50	228	317	+ 39
New Mexico	281	512	+ 82	337	415	+ 23	618	927	+ 50
Nevada	410	325	- 21	1,619	926	- 43	2,029	1,251	- 38
Oregon	626	368	- 41	1,051	773	- 26	1,677	1,141	- 32
Utah	538	324	- 40	647	498	- 23	1,185	822	- 31
Washington	886	815	- 8	2,417	2,530	+ 5	3,303	3,345	+ 1
Wyoming	220	270	+ 23	136	107	- 21	355	377	+ 6

Source: ENR-F.W. Dodge Division

Minimum contracts: \$50,000. Excludes 1-2 family houses. Numbers are based on latest revised figures.

Reprints of ENR's Forecast '92 report (this and following sections) are available for \$10 each. Please include payment with order. Multiple copy rates are available on request. For reprint orders and rates, contact: Kathy Curran, ENR, Room 4188, 1221 Avenue of the Americas, New York, N.Y. 10020.

Pacific Northwest targeted for growth

NATIONAL REPORT — Sales of hardlines and building materials are expected to rise marginally this year, and certain metropolitan areas could experience significant declines.

According to figures in the 1992 *Editor and Publisher Market Guide (E&P)*, 10 states—three of them in New England—will generate less sales in these categories this year. The other states and the District of Columbia will show at least slight home improvement sales increases, accord-

ing to E&P, which bases its estimates on sales of all outlets that sell these products, including discounters and specialty stores.

All told, the United States is expected to produce \$114 billion in hardlines and building material sales this year, a 2.5 percent increase over E&P's estimates from the previous year.

California, by far the nation's largest retail home improvement market (seven of the top 50 metro areas are in the state), will continue to

grow, but at a slow pace. This comes as no surprise, as several retailers throughout the state have experienced severe sales declines and contractor sales have been way down due to the virtual standstill in new home construction.

The Los Angeles and Long Beach areas, however, will continue to generate the most sales in any metro area. According to E&P, the metro L.A. region is projected to reach sales of about \$3 billion, slightly above last year's \$2.97 billion. (These data were calculated prior to

the rioting in Los Angeles, whose estimated damages are approaching \$1 billion, and whose rebuilding is likely to have a long-range positive impact on sales of these products).

On the other hand, the Pacific Northwest seems to be the home improvement hot spot, as sales are expected to grow in Washington and Oregon.

Although sales in Seattle are not expected to increase dramatically, they are continually inching upwards as several home improvement players are trying to grab a piece of

the pie. And Portland, Ore., which did not even rank among E&P's top 50 sales-generating cities last year, was ranked 48th with sales of about \$493 million.

The West, in fact, has several pockets of growth. Nevada is projected to expand its sales by nearly 8 percent; Arizona by just under 4 percent. But Colorado's sales are projected to decline by 4.3 percent.

The Texas market appears to be rebounding, too, with sales expected to grow by 4 percent. Houston, Dallas, Fort

Rank 1992	Rank 1991	City (Metro Area)	1992 Bldg. Mat'l Sales vol. (\$ MIL.)	1991 Bldg. Mat'l Sales vol. (\$ MIL.)	Percent Change 91-92
1	1	Los Angeles/Long Beach	3,067.9	2,974.6	3.1
2	2	Chicago	1,968.1	2,052.9	- 3.2
3	4	Philadelphia	1,833.4	1,797.6	1.4
4	3	Atlanta	1,783.7	1,810.5	- 1.5
5	5	Boston/Lawrence/Salem/Lowell/Brockton	1,766.6	1,758.6	0.5
6	6	New York	1,729.2	1,681.3	2.8
7	7	Detroit	1,692.5	1,640.5	3.2
8	8	Houston	1,607.8	1,541.7	4.3
9	9	Washington D.C.	1,541.3	1,526.4	1.0
10	10	Nassau-Suffolk, N.Y.	1,530.7	1,500.6	2.0
11	11	Minneapolis/St. Paul	1,395.3	1,346.3	3.6
12	12	Anaheim/Santa Ana, Calif.	1,292.9	1,260.7	2.6
13	13	Riverside/San Bernardino, Calif.	1,240.0	1,171.6	5.8
14	14	Dallas	1,208.1	1,158.4	4.3
15	18	Seattle	1,067.1	1,004.6	8.2
16	16	Phoenix	1,078.1	1,039.7	3.7
17	17	Tampa/St. Petersburg/Clearwater, Fla.	1,031.6	1,022.6	0.9
18	19	San Diego	972.9	950.1	2.4
19	20	Baltimore	914.9	906.2	1.0
20	15	St. Louis	866.3	1,102.0	-21.4
21	22	Oakland, Calif.	851.5	831.3	2.4
22	21	Denver	806.6	869.4	- 7.2
23	23	Sacramento, Calif.	768.0	734.1	4.6
24	24	Pittsburgh	736.6	724.6	1.7
25	28	Kansas City, Mo.	689.4	666.0	3.5
26	26	Orlando, Fla.	683.4	677.5	0.9
27	30	San Francisco	674.7	638.2	5.7
28	27	Miami/Mialeah, Fla.	673.3	667.4	0.9
29	31	Ft. Worth/Arlington, Texas	637.0	629.9	4.3
30	29	San Jose, Calif.	634.4	642.2	1.9
31	32	Charlotte/Gastonia/Rock Hill, N.C.	622.1	611.1	1.8
32	33	Bergen-Passaic, N.J.	608.4	604.0	0.7
33	37	Oklahoma City	605.8	562.0	7.8
34	34	Indianapolis	597.8	592.7	0.7
35	35	Norfolk/Virginia Beach/Newport News, Va.	596.2	580.9	2.6
36	36	San Antonio	589.1	564.8	4.3
37	39	Austin, Texas	565.0	541.7	4.3
38	38	Cleveland	552.5	542.5	1.8
39	25	Newark, N.J.	547.2	701.6	-22.0
40	40	Cincinnati	546.9	533.9	2.4
41	41	Fl. Lauderdale/Hollywood/Pompano Beach, Fla.	534.5	529.8	0.9
42	45	Milwaukee	527.7	497.1	6.2
43	47	Salt Lake City	525.2	495.0	6.1
44	48	New Orleans	518.9	482.1	7.6
45	43	Monmouth-Ocean, N.J.	513.1	509.4	0.7
46	46	Columbus, Ohio	504.9	495.7	1.9
47	42	Hartford/New Britain/Middletown/Bristol, Conn.	498.5	514.4	- 3.1
48	50	Portland, Ore.	493.2	449.9	9.6
49	44	Bridgeport/Stamford/Norwalk/Danbury, Conn.	476.2	499.9	- 4.7
50	49	Middlesex/Somerset/Hunterdon, N.J.	464.8	461.4	0.7
Totals and Averages			47,780.4	47,097.4	1.4

Rank 1992	Rank 1991	State	1992	1991	1990	1989	1988	% Change 91-92	5-Year % Change
1	1	California	12,791,010	12,342,949	12,273,079	12,271,232	10,791,437	3.63	19
2	2	Texas	8,386,107	8,050,383	8,899,930	8,675,053	8,186,329	4.17	2
3	3	Florida	6,869,846	6,811,835	6,509,356	6,345,591	5,650,467	0.85	22
4	4	New York	6,166,378	6,005,202	5,680,246	5,449,515	5,035,120	2.68	22
5	5	Pennsylvania	4,757,568	4,677,851	5,389,077	4,197,617	3,764,572	1.70	26
6	6	Illinois	4,578,053	4,503,588	4,312,903	4,143,961	3,840,915	1.65	19
7	7	Michigan	4,152,560	4,018,534	3,864,746	3,685,578	3,228,616	3.34	29
8	8	Ohio	3,966,101	3,895,831	3,698,337	3,591,415	3,304,288	1.80	20
9	9	North Carolina	3,778,170	3,719,948	3,606,701	3,443,849	3,006,706	1.57	26
10	10	Georgia	3,295,495	3,469,853	3,242,769	3,123,212	2,687,019	- 2.14	26
11	11	New Jersey	3,257,718	3,234,204	3,174,269	3,095,050	2,666,903	0.73	22
12	12	Massachusetts	2,866,985	2,852,879	2,763,410	2,627,893	2,367,428	0.49	21
13	13	Virginia	2,746,903	2,673,211	2,499,484	2,443,539	2,171,252	2.76	27
14	14	Minnesota	2,736,943	2,647,377	2,738,568	2,585,643	2,359,060	3.38	16
15	16	Washington	2,603,282	2,403,757	2,369,929	2,310,926	2,037,892	8.30	28
16	15	Indiana	2,523,631	2,505,153	2,362,529	2,295,205	2,160,810	0.74	17
17	17	Missouri	2,442,386	2,373,901	2,216,729	2,300,571	2,074,472	2.88	18
18	18	Wisconsin	2,352,985	2,210,276	2,153,888	2,112,457	1,912,585	6.46	23
19	19	Louisiana	2,146,574	1,995,051	2,142,681	2,045,309	1,862,052	7.59	4
20	20	Tennessee	1,968,841	1,964,158	1,909,074	1,865,293	1,674,766	1.26	19
21	21	Maryland	1,939,243	1,916,768	1,699,499	1,747,803	1,514,491	1.17	28
22	26	South Carolina	1,832,488	1,628,258	1,646,669	1,567,535	1,427,049	12.54	28
23	22	Colorado	1,817,519	1,899,019	2,048,875	2,017,001	1,868,142	- 4.29	- 4
24	23	Arizona	1,752,414	1,690,418	1,745,963	1,719,860	1,491,799	3.67	17
25	24	Alabama	1,699,957	1,658,747	1,593,940	1,560,034	1,393,934	2.48	22
26	25	Connecticut	1,597,846	1,655,460	1,536,052	1,457,802	1,322,763	- 3.53	21
27	27	Kentucky	1,576,465	1,504,305	1,500,670	1,423,549	1,330,516	4.81	19
28	28	Oklahoma	1,550,558	1,477,301	1,581,999	1,528,272	1,504,480	4.96	3
29	29	Iowa	1,533,165	1,461,027	1,559,114	1,504,156	1,440,189	4.94	6
30	30	Kansas	1,301,132	1,209,305	1,247,333	1,218,105	1,167,170	7.59	11
31	31	Oregon	1,297,352	1,205,209	1,193,102	1,142,276	1,019,000	7.65	27
32	32	Arkansas	1,032,236	1,019,384	1,043,675	1,002,414	902,357	1.26	14
33	34	Mississippi	968,545	937,838	977,944	929,210	854,168	3.27	13
34	33	New Hampshire	968,540	1,011,339	931,023	882,097	744,458	- 4.23	30
35	36	Nebraska	863,784	833,776	911,132	866,559	827,001	3.60	4
36	35	West Virginia	834,884	837,867	807,488	766,330	763,813	- 0.36	9
37	37	Maine	812,032	788,835	715,009	678,921	600,681	2.94	35
38	38	Utah	795,587	749,442	802,164	784,096	735,398	6.15	8
39	39	New Mexico	755,468	738,503	838,888	834,326	770,792	2.32	- 2
40	41	Nevada	620,155	575,083	632,675	603,188	546,948	7.84	13
41	40	Alaska	591,424	598,301	662,659	651,579	638,160	- 1.15	- 7
42	43	Montana	474,206	456,870	508,614	499,904	482,538	3.79	- 2
43	42	Idaho	449,736	484,331	531,606	504,145	471,813	- 7.14	- 5
44	44	Vermont	430,424	436,484	422,412	405,748	346,453	- 1.39	24
45	45	Rhode Island	419,054	413,704	385,925	365,261	332,005	1.29	26
46	46	North Dakota	415,421	408,176	430,608	407,573	423,181	1.77	- 2
47	47	South Dakota	413,398	393,519	413,961	392,159	368,370	5.05	12
48	49	Hawaii	388,391	370,324	337,905	321,736	288,159	4.88	35
49	48	Delaware	330,881	377,775	269,248	338,437	308,184	-12.41	- 7
50	50	Wyoming	274,616	279,490	339,623	323,825	324,820	- 1.74	- 15
Totals and Averages			114,243,977	111,372,799	111,092,080	107,852,890	97,213,521	2.58	18

TABLE F-2 U.S. BANKRUPTCY COURTS
BUSINESS AND NONBUSINESS BANKRUPTCY CASES COMMENCED, BY CHAPTER OF THE BANKRUPTCY CODE,
DURING THE TWELVE MONTH PERIOD ENDED JUNE 30, 1992

CIRCUIT AND DISTRICT	TOTAL FILINGS	TOTAL BUSINESS FILINGS:					TOTAL NON-BUSINESS FILINGS:							
		CHAP. 7	CHAP. 11	CHAP. 12	CHAP. 13	CHAP. 7	CHAP. 11	CHAP. 12	CHAP. 13					
TOTAL...	972,490	679,882	24,029	1,634	267,121	72,650	38,843	20,747	1,634	11,382	899,840	640,819	3,282	255,739
DC	1,421	831	137	-	453	174	48	118	-	12	1,247	785	21	441
1ST...	34,111	22,938	1,731	28	9,413	4,310	2,069	1,541	28	671	29,801	20,869	190	8,742
ME	2,288	1,810	57	2	419	394	272	53	2	67	1,894	1,538	4	352
MA	15,946	12,584	1,128	5	2,251	2,299	1,134	1,005	5	155	13,647	11,430	121	2,096
NH	3,975	3,500	152	2	321	398	239	128	2	29	3,579	3,261	26	292
RI	3,639	3,304	151	-	184	353	211	132	-	10	3,286	3,093	19	174
PR	8,263	1,780	245	19	6,238	868	213	225	19	410	7,395	1,547	20	8,828
2ND...	59,498	48,327	3,043	57	10,047	5,208	2,055	2,588	57	486	64,286	44,272	455	8,561
CT	8,917	7,450	345	1	1,119	382	157	202	1	-	8,555	7,293	143	1,119
NY, N.	9,335	7,425	193	18	1,699	898	508	182	18	187	8,439	6,916	11	1,512
NY, E.	20,161	15,427	810	3	3,921	1,017	326	659	3	29	19,144	15,101	151	3,892
NY, S.	11,943	9,492	1,478	2	951	1,710	349	1,334	2	5	10,233	8,143	144	948
NY, W.	8,135	5,633	188	16	2,318	1,007	577	166	18	248	7,128	5,058	2	2,070
VT	1,005	900	49	17	39	216	137	45	17	17	789	763	4	22
3RD...	49,788	34,957	2,108	15	12,710	4,036	1,881	1,788	15	352	45,752	33,076	318	12,356
DE	1,411	929	139	-	343	178	40	132	-	6	1,233	889	7	337
NJ	23,986	17,353	959	4	5,680	1,481	707	714	4	58	22,515	16,648	245	5,824
PA, E.	12,405	8,835	559	2	5,009	1,090	467	532	2	89	11,315	8,388	27	4,920
PA, M.	5,211	4,271	204	3	733	729	390	191	3	145	4,482	3,881	13	588
PA, W.	8,721	5,554	227	6	934	532	272	201	6	53	8,189	5,282	28	881
VI	44	15	18	-	11	28	5	18	-	3	18	10	-	8
4TH...	73,389	48,466	1,950	67	22,904	8,095	3,390	1,789	67	887	67,284	45,076	181	22,037
MD	16,023	11,187	597	6	4,233	1,370	681	543	6	140	14,653	10,508	54	4,093
NC, E.	5,582	2,934	123	19	2,506	595	279	111	19	186	4,987	2,855	12	2,320
NC, M.	5,746	1,685	72	3	3,886	472	273	72	3	124	5,274	1,412	-	3,862
NC, W.	5,017	1,838	102	3	3,089	178	88	107	3	-	4,839	1,770	-	3,089
SC	7,388	3,061	235	13	3,277	319	112	175	13	19	7,067	3,749	80	3,258
VA, E.	22,301	17,247	641	14	4,389	2,089	1,225	584	14	256	20,212	16,022	47	4,143
VA, W.	6,790	5,752	88	8	942	819	448	83	8	82	6,171	5,306	5	880
WV, N.	1,511	1,380	34	-	98	200	144	34	-	21	1,311	1,238	-	75
WV, S.	3,033	2,582	53	1	396	253	162	50	1	39	2,780	2,420	3	357
5TH...	76,459	44,438	2,039	243	29,736	8,117	2,878	1,633	243	1,160	70,342	41,560	206	28,578
LA, E.	5,711	3,822	126	1	1,782	196	98	97	1	-	5,515	3,724	29	1,782
LA, M.	1,493	1,074	37	-	382	89	29	34	-	6	1,424	1,045	3	376
LA, W.	6,881	4,084	107	88	2,707	687	358	107	68	114	6,314	3,728	-	2,586
MS, N.	4,143	2,502	57	18	1,486	198	102	58	18	22	3,945	2,480	1	1,484
MS, S.	8,594	4,845	115	15	3,819	284	141	101	15	27	6,310	4,704	14	3,592
TX, N.	18,592	11,349	599	67	7,575	2,195	1,088	548	67	490	17,397	10,261	51	7,085
TX, E.	3,744	2,205	149	11	1,379	517	225	140	11	141	3,227	1,980	9	1,238
TX, S.	13,597	7,812	547	12	5,225	1,252	498	493	12	248	12,345	7,314	54	4,977
TX, W.	12,604	6,685	302	31	5,608	739	339	257	31	112	11,685	6,326	45	5,494
6TH...	127,820	81,787	1,577	189	44,266	8,217	3,388	1,497	189	1,142	121,603	78,399	80	43,124
KY, E.	7,036	6,014	87	13	924	457	306	85	13	53	6,581	5,708	2	871
KY, W.	8,500	6,558	104	10	1,828	317	174	99	10	34	8,183	6,384	5	1,794
MI, E.	18,095	14,339	382	26	4,387	1,118	613	349	26	127	17,979	13,728	13	4,240
MI, W.	7,578	5,721	144	32	1,881	853	333	138	32	150	6,925	5,388	6	1,531
OH, N.	21,007	18,545	202	40	4,220	942	584	192	40	146	20,085	15,981	10	4,074
OH, S.	23,025	18,508	214	33	8,270	852	487	202	33	130	22,173	16,021	12	6,140
TN, E.	12,299	5,949	79	19	8,252	495	223	76	19	177	11,604	5,726	3	6,075
TN, N.	11,678	5,751	208	13	5,708	1,010	544	191	13	282	10,668	5,207	17	5,444
TN, W.	17,600	4,402	177	3	13,018	375	144	165	3	63	17,225	4,258	12	12,955

NE. 4,020
 Total
 % of U.S. 5.53%

31,750
 3.53%

1992

TABLE F-2 U.S. BANKRUPTCY COURTS
BUSINESS AND NONBUSINESS BANKRUPTCY CASES COMMENCED, BY CHAPTER OF THE BANKRUPTCY CODE,
DURING THE TWELVE MONTH PERIOD ENDED JUNE 30, 1992
 (CONTINUED)

CIRCUIT AND DISTRICT	TOTAL FILINGS	TOTAL BUSINESS FILINGS*				TOTAL NON-BUSINESS FILINGS								
		CHAP. 7	CHAP. 11	CHAP. 12	CHAP. 13	CHAP. 7	CHAP. 11	CHAP. 12	CHAP. 13					
7TH...	84,018	68,115	1,152	183	14,588	4,893	3,108	1,110	183	492	79,125	65,007	42	14,078
IL.N...	31,570	22,847	538	4	8,183	1,589	922	522	4	121	30,001	21,925	14	8,062
IL.C...	7,612	6,655	64	47	848	479	307	62	47	83	7,133	6,348	2	783
IL.S...	4,233	3,071	31	20	1,111	492	338	31	20	83	3,781	2,733	-	1,048
IN.N...	9,782	8,459	170	70	1,173	464	264	124	20	58	9,318	8,195	6	1,117
IN.S...	18,457	16,418	225	19	1,795	719	405	212	19	83	17,738	16,013	13	1,712
WI.E...	0,144	7,008	80	21	1,037	427	288	78	21	44	7,717	6,720	4	997
WI.W...	4,220	3,659	86	52	423	783	518	81	52	82	3,437	3,073	3	361
8TH...	58,943	42,661	680	312	15,088	4,684	3,085	863	312	602	54,279	39,778	17	14,488
AR.E...	5,308	2,777	52	20	2,459	333	158	50	20	107	4,975	2,621	2	2,352
AR.W...	3,278	2,298	44	18	918	221	112	41	18	52	3,055	2,188	3	868
IA.N...	2,407	2,278	38	10	87	495	421	38	10	28	1,912	1,657	-	55
IA.S...	3,973	3,477	35	12	449	208	158	34	12	4	3,787	3,321	1	445
MN...	17,770	13,157	203	33	4,377	1,442	1,021	190	33	190	16,328	12,138	5	4,187
MO.E...	10,575	5,989	85	8	4,513	412	278	61	8	47	10,163	5,893	4	4,468
MO.W...	8,580	7,408	114	44	1,014	739	503	113	44	79	7,841	6,905	1	935
NE...	4,357	3,047	65	83	1,180	357	155	65	83	52	4,000	2,892	-	1,108
ND...	1,248	1,157	18	48	25	175	101	18	48	8	1,073	1,058	-	17
SD...	1,449	1,293	28	38	90	284	184	27	38	35	1,185	1,109	1	55
9TH...	222,404	170,148	8,352	253	45,647	19,513	10,882	4,980	253	3,432	202,891	159,284	1,392	42,215
AK...	1,051	908	48	2	85	200	138	43	2	18	851	772	3	78
AZ...	20,401	14,895	858	22	4,525	2,151	1,032	730	22	388	18,250	13,983	128	4,159
CA.N...	28,810	18,940	1,031	8	8,833	2,733	1,334	754	8	839	24,077	17,808	277	6,194
CA.E...	23,012	17,979	497	49	4,487	2,478	1,347	453	49	827	20,538	16,832	44	3,668
CA.C...	67,827	72,183	2,558	15	12,873	6,897	4,488	1,738	15	680	80,730	67,717	820	12,193
CA.S...	15,319	9,828	388	4	5,101	735	380	322	4	49	14,584	9,488	68	5,052
HI...	1,284	1,135	46	-	83	109	64	43	-	2	1,155	1,071	3	81
ID...	4,140	2,825	74	49	1,182	409	193	88	49	89	3,731	2,632	8	1,093
MT...	2,055	1,785	52	42	1,93	218	95	50	42	28	1,838	1,670	2	167
NV...	7,701	5,580	289	1	1,851	503	154	285	1	83	7,198	5,408	24	1,788
OR...	14,312	9,839	107	14	4,252	1,198	584	103	14	497	13,114	9,355	4	3,755
WA.E...	3,876	3,132	83	43	618	485	274	76	43	92	3,391	2,858	7	528
WA.W...	14,605	10,935	321	8	3,541	1,385	811	313	8	253	13,420	10,124	8	3,288
GUAM...	28	21	2	-	3	12	10	2	-	-	14	11	-	3
NMI...	5	3	2	-	-	4	2	2	-	-	1	1	-	-
10TH...	55,724	43,751	831	187	10,972	4,019	2,488	792	187	589	51,705	41,283	39	10,383
CO...	18,575	12,422	249	31	3,870	1,029	624	247	31	124	18,548	11,798	2	3,748
KS...	9,599	7,812	123	47	1,817	583	344	116	47	78	9,018	7,488	7	1,541
NM...	4,507	3,742	97	17	651	454	287	88	17	64	4,053	3,475	11	587
OK.N...	4,835	3,844	85	5	921	595	430	83	5	87	4,240	3,414	2	824
OK.E...	1,818	1,450	15	7	144	121	87	15	7	12	1,495	1,383	-	132
OK.W...	6,815	7,189	88	50	1,508	420	243	83	50	44	6,395	6,928	5	1,464
UT...	8,342	6,041	154	8	2,141	692	403	145	8	138	7,850	5,838	9	2,003
WY...	1,435	1,271	40	4	120	125	70	37	4	14	1,310	1,201	3	108
11TH...	128,917	75,045	2,431	120	51,317	7,404	3,813	2,090	120	1,577	121,513	71,432	341	49,740
AL.N...	19,887	7,839	189	15	11,884	1,004	571	150	15	288	18,863	7,088	19	11,598
AL.M...	5,418	2,020	38	-	3,380	350	188	38	-	148	5,088	1,854	-	3,212
AL.S...	2,689	1,907	40	7	735	108	59	28	7	18	2,581	1,848	14	719
FL.N...	3,093	2,758	61	10	244	174	71	88	10	25	2,919	2,687	13	219
FL.M...	31,808	28,713	825	28	4,243	1,609	870	671	28	241	29,999	25,843	154	4,002
FL.S...	17,488	14,837	858	3	2,187	1,135	548	571	3	10	16,353	14,089	87	2,177
GA.N...	30,499	12,811	487	4	17,397	2,095	1,024	448	4	819	28,404	11,587	39	18,778
GA.M...	10,129	4,335	78	38	5,878	157	50	68	38	3	9,972	4,285	12	5,675
GA.S...	8,108	2,425	57	17	5,809	572	254	54	17	247	7,538	2,171	3	5,362

* THESE FIGURES INCLUDE THE FOLLOWING CASES NOT REFLECTED ELSEWHERE:

PR..... SECTION 304 : 01	CT..... CHAPTER 9 : 02	NY.S.... SECTION 304 : 20
WV.N.... CHAPTER 9 : 01	WV.S.... CHAPTER 9 : 01	TX.N.... CHAPTER 9 : 01
TX.N.... SECTION 304 : 01	TX.S.... CHAPTER 9 : 01	MI.E.... CHAPTER 9 : 01
NE..... CHAPTER 9 : 02	AZ..... SECTION 304 : 01	MI..... CHAPTER 9 : 02
MT..... SECTION 304 : 01	WA.W.... CHAPTER 9 : 01	WA.W.... SECTION 304 : 01
CO..... CHAPTER 9 : 03	FL.M.... SECTION 304 : 01	FL.S.... SECTION 304 : 03

New England Demographics: Contents

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RESIDENT POPULATION BY STATE, BOTH SEXES (000)

	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
SUM OF STATES	215,468	217,563	219,760	222,096	224,563	226,549	229,638	231,998	234,282	236,476	238,733	241,107	243,425	245,783	248,243	248,710	252,181
NORTHEAST REGION	49,412	49,369	49,284	49,195	49,160	49,136	49,262	49,323	49,525	49,710	49,862	50,067	50,299	50,589	50,772	50,809	50,977
NEW ENGLAND	12,165	12,191	12,240	12,284	12,321	12,349	12,417	12,434	12,492	12,575	12,662	12,742	12,843	12,964	13,046	13,207	13,198
Connecticut	3,083	3,083	3,086	3,092	3,096	3,108	3,124	3,129	3,143	3,156	3,175	3,194	3,212	3,232	3,239	3,287	3,291
Maine	1,072	1,088	1,104	1,114	1,123	1,125	1,133	1,137	1,145	1,156	1,164	1,171	1,186	1,206	1,222	1,228	1,235
Massachusetts	5,758	5,744	5,738	5,736	5,738	5,737	5,754	5,746	5,764	5,795	5,823	5,835	5,856	5,890	5,913	6,016	5,996
New Hampshire	629	845	670	892	909	921	937	946	959	976	998	1,027	1,056	1,085	1,107	1,109	1,105
Rhode Island	843	846	850	852	850	847	852	853	855	860	867	875	886	893	896	1,003	1,004
Vermont	480	485	492	498	505	511	517	521	526	530	535	540	547	558	567	563	567
MIDDLE ATLANTIC	37,247	37,178	37,044	36,911	36,839	36,767	36,845	36,880	37,033	37,135	37,200	37,325	37,456	37,625	37,726	37,602	37,779
New Jersey	7,338	7,340	7,337	7,351	7,367	7,365	7,407	7,430	7,468	7,517	7,568	7,626	7,676	7,718	7,736	7,730	7,760
New York	18,003	17,941	17,813	17,681	17,584	17,558	17,659	17,576	17,670	17,728	17,767	17,805	17,838	17,909	17,950	17,990	18,056
Pennsylvania	11,906	11,897	11,894	11,879	11,886	11,864	11,879	11,883	11,895	11,892	11,865	11,895	11,943	11,998	12,040	11,882	11,961
SOUTH REGION	69,565	70,680	71,816	72,983	74,273	75,372	77,064	78,496	79,723	80,778	81,865	82,982	83,878	84,637	85,525	85,446	86,917
SOUTH ATLANTIC	34,353	34,787	35,294	35,838	36,426	36,959	37,798	38,320	38,876	39,537	40,213	40,935	41,708	42,419	43,116	43,667	44,422
Delaware	587	590	592	595	595	594	598	602	610	616	626	637	646	660	673	666	680
Dist of Columbia	707	692	677	665	650	638	633	627	624	624	623	625	622	613	604	607	598
Florida	8,518	8,667	8,856	9,102	9,426	9,746	10,195	10,476	10,756	11,053	11,367	11,686	12,023	12,336	12,671	12,936	13,277
Georgia	5,064	5,133	5,220	5,296	5,401	5,403	5,570	5,654	5,736	5,845	5,975	6,101	6,226	6,339	6,436	6,476	6,623
Maryland	4,139	4,151	4,170	4,184	4,191	4,217	4,256	4,272	4,299	4,347	4,391	4,461	4,537	4,626	4,694	4,781	4,860
North Carolina	5,547	5,608	5,686	5,759	5,823	5,882	5,957	6,016	6,078	6,167	6,258	6,327	6,410	6,489	6,571	6,629	6,737
South Carolina	2,902	2,944	2,992	3,044	3,090	3,122	3,186	3,220	3,252	3,296	3,333	3,381	3,426	3,485	3,512	3,487	3,560
Virginia	5,047	5,122	5,193	5,270	5,308	5,347	5,442	5,489	5,558	5,635	5,704	5,798	5,916	6,013	6,098	6,187	6,266
West Virginia	1,842	1,880	1,906	1,923	1,942	1,950	1,961	1,962	1,963	1,952	1,936	1,917	1,898	1,876	1,857	1,793	1,801
EAST SOUTH CENTRAL	13,822	14,041	14,236	14,416	14,575	14,667	14,789	14,873	14,949	15,038	15,124	15,197	15,287	15,347	15,406	15,176	15,347
Alabama	3,679	3,735	3,780	3,832	3,866	3,894	3,928	3,944	3,963	3,991	4,021	4,051	4,084	4,103	4,116	4,041	4,089
Kentucky	3,468	3,529	3,574	3,610	3,642	3,681	3,677	3,695	3,713	3,720	3,724	3,722	3,723	3,726	3,727	3,685	3,713
Mississippi	2,399	2,430	2,459	2,488	2,507	2,521	2,545	2,567	2,583	2,599	2,613	2,624	2,624	2,620	2,621	2,573	2,592
Tennessee	4,276	4,347	4,423	4,486	4,560	4,591	4,639	4,667	4,690	4,728	4,766	4,800	4,856	4,898	4,940	4,877	4,953
WEST SOUTH CENTRAL	21,390	21,852	22,286	22,729	23,272	23,746	24,477	25,303	25,896	26,203	26,528	26,850	26,883	26,871	27,003	26,703	27,148
Arkansas	2,160	2,170	2,209	2,243	2,271	2,286	2,300	2,308	2,325	2,346	2,360	2,371	2,388	2,396	2,408	2,351	2,372
Louisiana	3,886	3,951	4,014	4,069	4,138	4,206	4,300	4,384	4,441	4,462	4,484	4,497	4,448	4,407	4,382	4,220	4,252
Oklahoma	2,775	2,827	2,870	2,917	2,975	3,025	3,108	3,233	3,312	3,312	3,302	3,300	3,269	3,234	3,224	3,146	3,176
Texas	12,569	12,904	13,193	13,500	13,888	14,229	14,769	15,378	15,818	16,083	16,382	16,682	16,778	16,834	16,991	16,987	17,349

REGIONAL AND STATE SUMMARIES

POPULATION, EFFECTIVE BUYING INCOME, RETAIL SALES, AND BUYING POWER INDEX [BPI]

REGION State	ESTIMATES				Pop. Per Sq. Ml. (Density)	% White	Households		1991 EBI (\$000)		1991 Retail Sales (\$000)		Buying Power Index (BPI)	Graduated Buying Power Indexes		
	12/31/91 Population (Thousands)	% DI U.S.	% Change 1980-91	%			12/31/91 Households (Thousands)	% DI U.S.	%	%	%	EPP (Economy- Priced Products)		MPP (Moderate- Priced Products)	PPP (Premium- Priced Products)	
NEW ENGLAND	13,338.6	5.2591	8.0	212	92.7	4,989.5	5.3262	228,834,922	6.1368	110,944,410	6.0913	5.9473	4.9322	4.9363	5.8169	
Connecticut	3,313.9	1.3066	6.6	684	89.3	1,239.5	1.3232	66,142,959	1.7738	26,543,565	1.4574	1.5854	1.0660	1.1205	1.5399	
Maine	1,247.9	.4920	10.9	40	98.5	473.6	.5056	16,781,995	.4500	10,091,828	.5541	.4896	.5441	.5594	.4511	
Massachusetts	6,048.3	2.3847	5.4	772	91.6	2,256.5	2.4087	104,610,978	2.8054	52,089,985	2.8599	2.7376	2.2714	2.1674	2.7138	
New Hampshire	1,143.6	.4509	24.2	128	98.2	424.3	.4529	19,054,994	.5110	11,008,774	.6044	.5270	.4164	.4509	.5188	
Rhode Island	1,012.1	.3990	6.9	968	93.1	380.8	.4065	14,444,997	.3874	6,760,389	.3712	.3848	.3999	.3898	.3783	
Vermont	572.8	.2259	12.0	62	98.7	214.8	.2293	7,798,999	.2092	4,449,869	.2443	.2229	.2344	.2483	.2150	
MIDDLE ATLANTIC	37,947.9	14.9621	3.2	382	82.4	14,028.8	14.9756	632,218,683	16.9542	266,597,624	14.6370	15.8607	14.3471	13.6360	16.3295	
New Jersey	7,813.5	3.0807	6.1	1,053	82.1	2,818.4	3.0086	155,172,906	4.1613	63,209,987	3.4704	3.7379	2.5630	2.5412	3.8465	
New York	18,166.3	7.1626	3.5	385	78.0	6,677.4	7.1281	298,926,889	8.0163	122,445,952	6.7227	7.4575	6.9885	6.3403	7.8160	
Pennsylvania	11,968.1	4.7188	.9	267	89.2	4,533.0	4.8389	178,118,888	4.7766	80,941,685	4.4439	4.6653	4.7956	4.7545	4.6670	
EAST NORTH CENTRAL	42,359.5	16.7014	1.6	174	86.5	15,724.6	16.7859	618,730,893	16.5924	303,829,171	16.6812	16.6412	15.7117	16.5944	16.8031	
Illinois	11,511.8	4.5389	.7	207	82.1	4,223.2	4.5082	187,922,992	5.0395	84,709,929	4.6509	4.8229	3.9489	4.1672	4.9408	
Indiana	5,594.4	2.2057	1.9	156	91.1	2,084.6	2.2253	75,280,996	2.0188	39,881,962	2.1896	2.1074	2.0915	2.3634	2.0812	
Michigan	9,382.2	3.6992	1.3	165	84.0	3,452.6	3.6857	134,687,916	3.6119	67,760,980	3.7203	3.6620	3.5166	3.5959	3.7609	
Ohio	10,918.7	4.3050	1.1	267	88.1	4,116.5	4.3943	151,669,914	4.0673	76,294,964	4.1888	4.1514	4.3606	4.4528	4.1118	
Wisconsin	4,952.4	1.9526	5.2	91	92.8	1,847.7	1.9724	69,169,008	1.8549	35,181,336	1.9316	1.8975	1.7941	2.0151	1.9084	
WEST NORTH CENTRAL	17,849.4	7.0375	3.9	35	92.5	6,799.5	7.2584	248,926,447	6.6754	128,510,344	7.0557	6.8616	7.1735	7.5496	6.4661	
Iowa	2,778.1	1.0953	-4.7	50	96.9	1,066.9	1.1389	37,683,017	1.0106	19,511,756	1.0713	1.0456	1.1429	1.2007	.9859	
Kansas	2,506.5	.9883	6.0	31	91.7	957.0	1.0216	35,930,028	.9635	17,159,623	.9421	.9621	1.0022	1.0463	.9006	
Minnesota	4,457.2	1.7574	9.4	56	94.6	1,680.6	1.7940	63,842,983	1.7121	35,159,987	1.9304	1.7865	1.6823	1.8577	1.7272	
Missouri	5,184.8	2.0442	5.5	75	88.0	1,986.9	2.1210	71,678,982	1.9222	36,427,985	2.0000	1.9700	2.1821	2.1941	1.8194	
Nebraska	1,586.0	.6253	1.0	21	94.5	605.9	.6468	22,384,014	.6002	10,693,370	.5871	.6012	.6079	.6701	.5819	
North Dakota	634.3	.2501	-2.8	9	94.6	240.3	.2565	8,010,009	.2148	4,669,914	.2564	.2343	.2719	.2851	.2129	
South Dakota	702.5	.2769	1.7	9	91.5	261.9	.2796	9,397,414	.2520	4,887,709	.2684	.2619	.2842	.2956	.2382	
SOUTH ATLANTIC	44,874.0	17.6928	21.4	169	77.5	17,010.5	18.1584	636,015,783	17.0561	328,761,764	18.0499	17.4816	18.5849	19.0932	17.5903	
Delaware	684.1	.2697	15.1	350	81.1	253.5	.2706	10,439,998	.2800	6,060,409	.3327	.2938	.2428	.2819	.2991	
District of Columbia	597.4	.2356	-6.4	9,730	32.1	244.8	.2613	10,751,992	.2883	3,606,373	.1980	.2508	.2350	.2322	.2674	
Florida	13,492.9	5.3199	38.4	250	84.7	5,359.1	5.7208	195,035,892	5.2303	109,570,910	6.0158	5.4837	6.0679	6.3899	5.4015	
Georgia	6,708.7	2.6451	22.8	116	71.4	2,451.4	2.6168	88,737,006	2.3797	46,910,489	2.5755	2.4916	2.7523	2.7294	2.4807	
Maryland	4,915.9	1.9382	16.6	503	71.2	1,797.0	1.9183	82,144,955	2.2029	36,385,417	1.9977	2.0884	1.5469	1.7399	2.1848	
North Carolina	6,777.2	2.6720	15.3	139	75.9	2,579.7	2.7538	87,885,995	2.3569	46,077,984	2.5298	2.4717	2.9138	2.9789	2.5453	
South Carolina	3,565.4	1.4058	14.2	118	69.2	1,288.6	1.3755	42,614,986	1.1428	24,219,853	1.3297	1.2514	1.5607	1.4936	1.2775	
Virginia	6,348.1	2.5029	18.7	160	78.0	2,349.7	2.5083	98,575,962	2.6435	45,782,963	2.5136	2.5615	2.3205	2.4569	2.6089	
West Virginia	1,784.3	.7036	-8.5	74	96.3	686.7	.7330	19,828,997	.5317	10,147,366	.5571	.5737	.9450	.7905	.5251	
EAST SOUTH CENTRAL	15,345.5	6.0505	4.6	86	79.5	5,720.4	6.1065	184,522,952	4.9485	97,306,693	5.3424	5.2871	7.2591	6.4002	5.1076	
Alabama	4,089.4	1.6124	5.0	81	73.7	1,525.5	1.6285	49,399,971	1.3248	26,132,246	1.4347	1.4153	1.9191	1.6899	1.4026	
Kentucky	3,704.2	1.4605	1.2	93	92.2	1,388.3	1.4820	44,585,998	1.1957	24,097,976	1.3231	1.2868	1.7941	1.5609	1.2137	
Mississippi	2,591.8	1.0219	2.8	55	63.4	918.0	.9799	26,565,004	.7124	13,692,446	.7517	.7861	1.3121	1.0147	.7094	
Tennessee	4,960.1	1.9557	8.0	120	83.1	1,888.6	2.0161	63,971,979	1.7156	33,384,025	1.8329	1.7989	2.2338	2.1347	1.7819	
WEST SOUTH CENTRAL	27,205.7	10.7266	14.6	64	82.1	9,840.3	10.5044	355,109,579	9.5230	190,942,239	10.4833	10.0518	12.2524	11.0594	9.5748	
Arkansas	2,374.8	.9363	3.9	46	83.0	901.8	.9627	27,340,008	.7332	15,583,945	.8556	.8105	1.1881	1.0737	.7414	
Louisiana	4,238.4	1.6711	.8	97	67.3	1,504.7	1.6062	50,647,994	1.3582	28,996,995	1.5920	1.4910	2.1332	1.6690	1.3807	
Oklahoma	3,157.8	1.2451	4.4	46	82.5	1,211.2	1.2930	37,055,007	.9937	20,200,258	1.1091	1.0786	1.5884	1.4256	1.0411	
Texas	17,434.7	6.8741	22.6	67	85.4	6,222.6	6.6425	240,066,570	6.4379	126,161,041	6.9266	6.6717	7.3427	6.8911	6.4116	
MOUNTAIN	14,103.3	5.5605	24.0	16	91.6	5,202.7	5.5538	187,155,689	5.0191	96,491,074	5.2977	5.2111	5.8044	5.9125	5.1865	
Arizona	3,825.5	1.5083	40.8	34	89.2	1,430.7	1.5272	48,712,001	1.3063	26,893,039	1.4765	1.3978	1.7269	1.6937	1.3643	
Colorado	3,367.9	1.3279	16.5	32	92.8	1,312.9	1.4015	51,276,995	1.3751	25,216,404	1.3844	1.3684	1.3590	1.4333	1.3984	
Idaho	1,023.2	.4034	8.4	12	97.1	367.4	.3922	12,832,000	.3442	6,191,970	.3399	.3548	.3990	.4248	.3473	
Montana	801.4	.3160	1.9	6	92.9	307.3	.3281	10,267,008	.2754	5,472,882	.3005	.2911	.3723	.3555	.2824	
Nevada	1,301.4	.5131	62.6	12	88.1	504.0	.5380	19,365,994	.5194	9,825,951	.5395	.5242	.5173	.5667	.5278	
New Mexico	1,561.4	.6156	19.8	13	87.6	560.2	.5980	18,197,991	.4880	9,645,014	.5296	.5260	.6926	.6494	.5026	
Utah	1,770.2	.6979	21.2	22	95.7	551.3	.5885	20,318,794	.5448	10,451,699	.5739	.5842	.5605	.6110	.6030	
Wyoming	452.3	.1783	-3.7	5	96.2	168.9	.1803	6,184,906	.1659	2,794,115	.1534	.1646	.1768	.1781	.1607	
PACIFIC	40,605.2	16.0095	27.7	45	81.8	14,361.5	15.3308	637,452,095	17.0945	298,002,617	16.3615	16.6576	13.9347	14.8184	17.1252	
Alaska	570.2	.2248	41.9	1	76.0	195.9	.2091	10,173,460	.2728	4,740,158	.2603	.2594	.1976	.1937	.2430	
California	30,975.0	12.2127	30.9	199	81.2	10,741.2	11.4661	490,749,649	13.1604	220,871,295	12.1266	12.6608	10.1781	10.8414	13.0299	
Hawaii	1,138.1	.4487	18.0	177	31.9	367.0	.3918	18,911,993	.5071	11,411,804	.6266	.5312	.3506	.4083	.5381	
Oregon	2,912.8	1.1484	10.6	30	94.3	1,130.6	1.2069	39,836,051	1.0683	23,262,179	1.2772	1.1470	1.2346	1.3358	1.1770	
Washington	5,009.1	1														

Population Projections

	<u>1992E</u>	<u>1993E</u>	<u>Growth</u>
I. United States	254.0M	255.9M	+0.7%
A. New England	13.2M	13.3M	+0.7%
% Total	5.2%	5.2%	
1. Maine	1.23	1.23	
2. New Hampshire	1.19	1.21	
3. Vermont	0.57	0.57	
4. Massachusetts	5.92	5.94	
5. Rhode Island	1.01	1.02	
6. Connecticut	3.32	3.34	

Total Housing Units Authorized (Permits) (1991)

I. United States	961M	
A. New England	31.1	3.2%
1. Maine	3.4	
2. New Hampshire	2.9	
3. Vermont	1.9	
4. Massachusetts	12.9	
5. Rhode Island	2.4	
6. Connecticut	1.9	

Population Estimates

7/1/89

I. Maine

A. Total 1,222M
Male 596M
Female 626M

B. By Age

	<u>Total</u>	<u>Male</u>	<u>Female</u>
1-14	253M	129M	124M
15-24	184	93	91
25-34	209	105	104
35-44	182	91	91
45-54	121	59	62
55-64	109	52	57
65+	164	67	97

II. Massachusetts

A. Total 5,913M
Male 2,829M
Female 3,084M

B. By Age

	<u>Total</u>	<u>Male</u>	<u>Female</u>
1-14	1119M	574M	545M
15-24	875	435	440
25-34	1084	534	549
35-44	881	430	450
45-54	596	288	308
55-64	546	255	291
65+	814	314	500

III. New Hampshire

A. Total 1,107M
Male 544M
Female 563M

B. By Age

	<u>Total</u>	<u>Male</u>	<u>Female</u>
1-14	234M	120M	114M
15-24	169	84	85
25-34	202	101	101
35-44	173	88	85
45-54	111	55	56
55-64	91	44	47
65+	126	51	75

IV. Rhode Island

A. Total 998M

Male 478M

Female 520M

B. By Age

	<u>Total</u>	<u>Male</u>	<u>Female</u>
1-14	193M	99M	94M
15-24	147	73	74
25-34	176	88	88
35-44	142	70	72
45-54	97	47	50
55-64	94	44	50
65+	148	58	90

V. Vermont

A. Total 567M

Male 278M

Female 287M

B. By Age

	<u>Total</u>	<u>Male</u>	<u>Female</u>
1-14	118M	61M	57M
15-24	89	44	45
25-34	105	52	53
35-44	88	44	44
45-54	55	27	28
55-64	45	21	24
65+	68	27	41

Auto Industry

Auto Industry Overview: Contents

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New England Vehicle Statistics

1. 15.2 million households own vehicles (smallest of 4 U.S. regions: includes NY & PA).
2. 26.6 million vehicles (smallest of all U.S. regions)
3. 1.7 vehicles per household (U.S. average is 1.8)
4. Avg. of H.H. vehicle. 1986 - 1989 28% (largest percentage of all U.S. regions)
 1981 - 1985 40% (largest of all U.S. regions)
 1975 - 1980 24% (smallest of all U.S. regions)
 1974 or earlier 8% (smallest of all U.S. regions)
5. 18M miles traveled per H.H. (fewest of all U.S. Regions)
6. 10.3M miles traveled per vehicle per year (2nd largest)
7. 19.6 miles per gallon (most fuel efficient region)

New England vehicles
are newer than other
U.S. areas.

New England States Statistics - 1991 (Source: U.S. Dept. of Commerce, R.L. Polk & Co., U.S. Dept. of Transportation)

	<u>Population (000)</u>	<u>Import Cars</u>	<u>Domestic Cars</u>	<u>Light Trucks</u>
Connecticut	3287	699,046	1,772,458	111,257
Maine	1228	171,847	569,950	192,567
Massachusetts	6,016	1,170,857	2,063,002	418,132
New Hampshire	1,109	249,267	502,080	166,970
Rhode Island	1,003	187,759	375,574	89,333
Vermont	563	119,701	221,851	105,278

	<u>Imports as a % of Total Vehicles</u>	<u>Light Trucks as a % of Total Vehicles</u>	<u>Total Non-Domestic</u>
Connecticut	27%	4%	31%
Maine	18	21	39%
Massachusetts	32	11	43%
New Hampshire	27	18	45%
Rhode Island	29	14	43%
Vermont	27	23	50%
Total	28.3%	11.8%	40.1%

Total U.S. Motor Vehicle Registrations

		<u>Millions - Units</u>			
		<u>1981*</u>	<u>1990*</u>	<u>10 yr. Avg. Annual Growth Rate</u>	<u>1991**</u>
Cars	- Domestic	123.1	143.5	+1.66% per year	123.3
	- Import	18.5	29.1	+5.73%	
Light Trucks	- Domestic	27.2	37.4	+3.75%	45.2
	- Import	2.1	6.1	+19.05%	
Total		150.3	180.9	+2.04% per year	168.5

* U.S. Dept. of Transportation/R.L. Polk & Co.

** APAA

Total U.S. Motor Vehicle Sales (new)

		<u>Millions - Units</u>		
		<u>1981*</u>	<u>1990*</u>	<u>1991**</u>
Cars	- Domestic	6.2	6.9	6.1
	- Import	2.3	2.4	2.1
Light Trucks	- Domestic	1.6	3.8	3.4
	- Import	0.4	0.8	0.7

* U.S. Dept. of Commerce, Bureau of Economic Analysis

** APAA

U.S. New Car Sales by Class (1991)

• Subcompact	24.9%
• Compact	16.3
• Intermediate	37.3
• Standard	7.8
• Specialty	1.7
• Luxury	8.0
• Near Luxury	4.0

U.S. Light Truck Sales by Class (1991)

A. Pickups	49.7%
• Compact	23.6%
• Full Size	26.1%
B. Sport/Utility	21.8%
• Compact	18.9%
• Full Size	2.9%
C. Vans	28.5%
• Minivans	21.1%
• Full Size	7.4%

REGISTRATIONS

CAR • TRUCK • BUS

Total Motor Vehicle Registrations by State

TOTAL MOTOR VEHICLE REGISTRATIONS BY STATE, 1990-1991

State	Automobiles		Trucks and Buses		Total Motor Vehicles	
	Registered 1990	Estimated 1991	Registered 1990	Estimated 1991	Registered 1990	Estimated 1991
Alabama	2,733,066	2,785,000	1,011,425	1,031,000	3,744,491	3,816,000
Alaska	302,121	306,000	175,204	177,000	477,325	483,000
Arizona	2,001,736	2,039,000	823,376	839,000	2,825,112	2,878,000
Arkansas	934,337	940,000	513,323	517,000	1,447,660	1,457,000
California	16,971,853	17,193,000	4,954,025	4,898,000	21,925,878	22,091,000
Colorado	2,300,119	2,310,000	855,252	851,000	3,155,371	3,161,000
Connecticut	2,471,504	2,461,000	151,462	149,000	2,622,966	2,610,000
Delaware	406,240	409,000	119,849	121,000	526,089	530,000
Florida	8,694,852	8,886,000	2,254,954	2,292,000	10,949,806	11,178,000
Georgia	3,833,915	3,915,000	1,655,229	1,717,000	5,489,144	5,632,000
Hawaii	671,926	696,000	99,552	103,000	771,478	799,000
Idaho	636,250	651,000	417,288	413,000	1,053,538	1,064,000
Illinois	6,299,676	6,249,000	1,573,513	1,582,000	7,873,189	7,831,000
Indiana	3,196,573	3,215,000	1,169,187	1,190,000	4,365,760	4,405,000
Iowa	1,880,368	1,909,000	751,605	759,000	2,631,973	2,668,000
Kansas	1,404,743	1,418,000	607,610	619,000	2,012,353	2,037,000
Kentucky	1,915,091	1,942,000	994,317	1,021,000	2,909,408	2,963,000
Louisiana	1,998,158	2,009,000	996,605	1,007,000	2,994,763	3,016,000
Maine	741,797	722,000	234,813	230,000	976,610	952,000
Maryland	2,970,320	3,020,000	636,200	647,000	3,606,520	3,667,000
Massachusetts	3,223,859	3,168,000	501,939	505,000	3,725,798	3,673,000
Michigan	5,612,877	5,641,000	1,596,340	1,618,000	7,209,217	7,259,000
Minnesota	2,741,763	2,830,000	766,174	785,000	3,507,937	3,615,000
Mississippi	1,434,111	1,442,000	441,334	445,000	1,875,445	1,887,000
Missouri	2,759,818	2,778,000	1,144,861	1,166,000	3,904,679	3,944,000
Montana	457,263	471,000	325,890	334,000	783,153	805,000
Nebraska	912,688	913,000	471,158	469,000	1,383,846	1,382,000
Nevada	592,118	601,000	261,326	274,000	853,444	875,000
New Hampshire	751,347	760,000	194,396	194,000	945,743	954,000
New Jersey	5,179,511	5,192,000	472,871	469,000	5,652,382	5,661,000
New Mexico	806,207	811,000	495,054	500,000	1,301,261	1,314,000
New York	8,831,316	8,893,000	1,364,837	1,396,000	10,196,153	10,289,000
North Carolina	3,676,785	3,704,000	1,485,220	1,503,000	5,162,005	5,207,000
North Dakota	371,543	369,000	258,296	255,000	629,839	624,000
Ohio	6,817,973	6,843,000	1,592,493	1,616,000	8,410,466	8,459,000
Oklahoma	1,710,717	1,731,000	938,334	959,000	2,649,051	2,690,000
Oregon	1,838,995	1,883,000	606,492	619,000	2,445,487	2,502,000
Pennsylvania	6,384,121	6,415,000	1,587,349	1,613,000	7,971,470	8,028,000
Rhode Island	563,333	567,000	108,474	106,000	671,807	673,000
South Carolina	1,877,508	1,911,000	642,229	665,000	2,519,737	2,576,000
South Dakota	424,785	428,000	279,001	277,000	703,786	705,000
Tennessee	3,552,828	3,633,000	891,280	910,000	4,444,108	4,543,000
Texas	8,714,154	8,866,000	4,085,661	4,147,000	12,799,815	13,013,000
Utah	789,347	787,000	416,170	428,000	1,205,517	1,215,000
Vermont	341,552	342,000	120,244	120,000	461,796	462,000
Virginia	3,775,728	3,811,000	1,162,334	1,196,000	4,938,062	5,007,000
Washington	2,979,369	3,041,000	1,277,497	1,294,000	4,256,866	4,335,000
West Virginia	752,762	751,000	472,185	478,000	1,224,947	1,229,000
Wisconsin	2,756,994	2,823,000	914,865	949,000	3,671,859	3,772,000
Wyoming	308,731	317,000	219,690	228,000	528,421	545,000
District of Columbia	244,879	246,000	17,052	17,000	261,931	263,000
Total	143,549,627	145,043,000	45,105,835	45,698,000	188,655,462	190,741,000

NOTE: Registrations include both privately owned and publicly owned motor vehicles, except those owned by the military services.

SOURCE: U.S. Department of Transportation, Federal Highway Administration, Table SS 90-A.

9,404,720 9,324,000
4.98%

New Passenger Car and Truck Registrations by State

NEW PASSENGER CAR AND TRUCK REGISTRATIONS BY STATE, 1990-1991

State	Passenger Cars		Motor Trucks		Total Motor Vehicles	
	1990	1991	1990	1991	1990	1991
Alabama	115,858	96,433	80,234	69,010	196,092	165,443
Alaska	15,392	13,684	19,018	16,781	34,410	30,465
Arizona	99,750	95,096	71,679	60,990	171,429	156,086
Arkansas	60,969	51,598	62,519	59,107	123,488	110,705
California	1,003,613	1,005,896	532,833	506,267	1,536,446	1,512,163
Colorado	113,468	118,689	74,673	76,717	188,141	195,406
Connecticut	140,759	116,458	46,456	37,325	187,215	153,783
Delaware	41,098	30,282	19,929	15,065	61,027	45,347
Florida	791,437	818,716	257,974	240,701	1,049,411	1,059,417
Georgia	231,902	201,960	132,466	112,357	364,368	314,317
Hawaii	71,950	71,924	25,804	25,343	97,754	97,267
Idaho	21,283	19,602	24,197	23,232	45,480	42,834
Illinois	534,199	477,982	218,553	204,737	752,752	682,719
Indiana	164,237	142,960	98,241	88,538	262,478	231,498
Iowa	74,012	62,856	57,537	53,328	131,549	116,184
Kansas	66,247	51,956	49,146	44,687	115,393	96,643
Kentucky	93,415	77,761	63,626	55,829	157,041	133,590
Louisiana	120,791	133,101	91,542	86,556	212,333	199,657
Maine	37,374	27,284	23,032	16,111	60,406	43,395
Maryland	258,085	236,620	106,412	96,565	364,497	333,185
Massachusetts	233,941	194,630	72,942	60,444	306,883	255,074
Michigan	424,359	381,246	226,201	205,883	650,560	587,129
Minnesota	135,109	118,167	87,827	82,850	222,936	201,017
Mississippi	53,937	44,927	46,325	40,392	100,262	85,319
Missouri	188,797	165,926	108,511	101,248	297,308	267,174
Montana	17,353	16,484	19,687	20,281	37,040	36,765
Nebraska	40,391	36,267	33,409	31,046	73,800	67,313
Nevada	53,407	54,797	31,325	29,474	84,732	84,271
New Hampshire	48,149	38,162	25,387	19,170	73,536	57,332
New Jersey	371,924	327,711	112,234	96,551	484,158	424,262
New Mexico	42,222	36,881	36,195	35,666	78,417	72,547
New York	584,112	496,029	201,880	170,355	785,992	666,384
North Carolina	212,443	178,949	122,916	103,676	335,359	282,625
North Dakota	14,033	12,272	13,036	12,494	27,069	24,766
Ohio	438,254	377,998	190,365	171,730	628,619	549,728
Oklahoma	80,060	72,222	74,661	70,582	154,721	142,804
Oregon	92,850	82,974	73,610	63,267	166,460	146,241
Pennsylvania	431,950	369,831	194,832	173,971	626,782	543,802
Rhode Island	34,178	25,876	10,811	7,968	44,989	33,844
South Carolina	113,503	90,726	70,816	55,054	184,319	145,780
South Dakota	16,429	13,720	15,606	14,404	32,035	28,124
Tennessee	153,731	138,542	95,390	86,167	249,121	224,709
Texas	562,775	509,968	410,133	382,580	972,908	892,548
Utah	41,357	37,107	34,931	31,675	76,288	68,782
Vermont	20,540	17,425	12,571	10,126	33,111	27,551
Virginia	241,201	214,727	117,108	95,596	358,309	310,323
Washington	135,284	122,218	99,138	90,599	234,422	212,817
West Virginia	51,029	43,676	37,884	33,655	88,913	77,331
Wisconsin	165,058	144,690	103,393	94,746	268,451	239,436
Wyoming	10,316	8,990	14,243	13,212	24,559	22,202
District of Columbia	18,245	14,279	3,303	3,159	21,548	17,438
Federal Government	20,428	15,742	45,974	47,337	66,402	63,079
GRAND TOTAL	9,103,204	8,234,017	4,798,515	4,344,604	13,901,719	12,578,621

SOURCE: R. L. Polk & Company. Permission for further use must be obtained from R. L. Polk & Company.

706,140
(5.07%)

570,979
(4.53%)

Car & Truck Industry Overview (Source: Jobber Retailer, June '92)

- Parts Retail sales (1990) dropped 3.8%, the lowest level since 1983.
- 25.8% of total passenger cars were import sales.
- Chrysler declined 13%, Ford declined 10%, General Motors declined 4%.
- Imports declined 10.9% (from '89)
- Of 167 million licensed drivers ('90), 48% were women.
- 81.3 million households (of the total U.S. 91.5 million households), or 88.9% own vehicles.
 - 11% do not own a vehicle.
 - 34% own one vehicle.
 - 37% own two vehicles.
 - 16% own three or more.
- New car buyers
 - Majority fall into the 35-44 year old range.

Environmental/Legislation

1. Freon will be gone by as early as 1997.
 - Substitutions: Suva (Du Pont) & KLEA 134a (ICI Americas)
 - Repair Garages will need recycling equipment to work on older freon-based AC units.
2. Antifreeze w/ethylene glycol may go.
 - Arco chemical introduced an antifreeze w/propylene glycol (non-toxic).
3. Motor Oil. May be ruled a hazardous waste by the Environmental Protection Agency (EPA)
 - 1988 Study by Fanple/Barker/Sloane • DIYers generated 193 million gallons of used motor oil
 1. 10 million: recycled properly
 2. 7 million: burned
 3. 58 million: into the trash
 4. 118 million: dumped in sewers & gutters
 - Expect future recycling requirements for retailers and mfg./suppliers
4. Batteries In 1991, 95% of Batteries were recycled.

Import Parts make up 23% of total retail & wholesale parts business.

NAPA now carries 26,000 part numbers for import cars.

New import models	3 U.S. mfgs.:	28 models
	9 Japanese mfgs.:	55 models

Vehicle Operating Data (Source: APAA)

- Avg. age of cars on the road (1991) 7.9 yrs.
- Almost 1/3 of all cars on the road are over 10 years old.
- Avg. age of light trucks 8.1 yrs.
- Avg. cost per mile for passenger cars 38.8¢
(based on 15,000 miles/yr. usage)
- Avg. cost of maintenance 2.2¢/mile

	<u>Passenger Cars</u>	<u>Light Trucks</u>
• Avg. miles driven	10,500	12,100
• Avg. gallons of gasoline used per year	505	857
• Avg. miles per gallon	20.92	14.09

Number of Front Wheel Drive Cars on the Road

<u>Year</u>	<u>Number (in Millions)</u>
1986	30
1987	35
1988	40
1989	45
1990	50
1991	60
1992	70
1993	80
1994	90

Source: Automobile Rebuilding, September 1992

Vehicle Operating Statistics

Registrations, Licensed Drivers, Miles Driven

	<u>Vehicles on the Road</u> ¹	<u>Licensed Drivers</u> ¹	<u>Miles Driven On All Roads</u> ^{1*}
1981	150,287,624	147,075,169	1,109,843,000
1982	151,874,162	150,233,659	1,179,623,000
1983	155,460,902	154,389,178	1,217,697,000
1984	159,084,210	155,423,709	1,255,342,000
1985	164,009,543	156,868,277	1,260,565,000
1986	168,761,167	158,494,000	1,301,214,000
1987	171,609,549	161,818,461	1,355,330,000
1988	176,572,189	164,853,255	1,429,297,000
1989	179,611,674	164,912,000	1,501,584,000
1990	180,929,205	167,015,250	1,515,370,000

Source: U.S. Department of Transportation/Highway Statistics

* Passenger Cars Only

Average Vehicle Statistics

	<u>Miles Driven</u> <u>Per Year</u> ¹	<u>Fuel Consumption</u> ¹ <u>(gallons)</u>	<u>Miles per Gallon</u> ¹	<u>Cost of Operation</u> ² <u>(cents per mile)</u> *	<u>Cost of Maintenance</u> ² <u>(cents per mile)</u>
1981	9,026	581	15.54	31.92	1.18
1982	9,167	561	16.33	32.35	1.00
1983	9,641	577	16.70	33.42	1.04
1984	9,809	579	16.94	31.32	1.04
1985	9,827	549	17.90	27.20	1.23
1986	9,625	525	18.32	29.59	1.37
1987	9,883	515	19.17	32.64	1.60
1988	10,119	507	19.95	33.40	1.60
1989	10,382	506	20.54	30.60	1.90
1990	10,556	505	20.92	37.30	2.20

Source: ¹ U.S. Department of Transportation/Highway Statistics

² American Automobile Association

* Based on car driven 15,000 miles per year

1992 Total Vehicles in Operation

Regions

A. Pacific:	Washington, Oregon, California
B. Mountain:	Idaho, Montana, Wyoming, Nevada, Utah, Colorado, Arizona, New Mexico
C. West North Central	North Dakota, South Dakota, Minnesota, Nebraska, Iowa, Kansas, Missouri
D. West South Central	Oklahoma, Texas, Arkansas, Louisiana
E. East North Central	Wisconsin, Michigan, Illinois, Indiana, Ohio
F. East South Central	Kentucky, Tennessee, Mississippi, Alabama
G. New England	Maine, Vermont, New Hampshire, Massachusetts, Connecticut, Rhode Island
H. Middle Atlantic	New York, Pennsylvania, New Jersey
I. South Atlantic	Maryland, West Virginia, Virginia, Delaware, North Carolina, South Carolina, Georgia, Florida

Vehicles in operation by region (millions - units)

	<u>Total Vehicles</u>	<u>Domestic Cars</u>	<u>Import Cars</u>	<u>Light Trucks</u>
Pacific & Mountain	34.6	13.7	10.7	10.2
West North Central	13.0	7.5	1.7	3.8
West South Central	18.0	9.0	3.0	6.0
East North Central	29.4	18.1	3.8	7.4
East South Central	10.4	5.6	1.7	3.1
New England	9.8	5.1	2.6	2.1
Middle Atlantic	22.3	12.7	5.1	4.6
South Atlantic	30.0	15.2	7.1	7.7
U.S. Total	168.6	87.2	36.1	45.2

Source: Jobber Retailer and R.L. Polk & Co. Statistics, June 1992

Auto Dealer Sales - 1990

<u>Area</u>	<u>Sales (\$000)</u>
A. Massachusetts	
1. Boston - Lawrence - Salem - Lowell - Brockton	6,505,564
2. Worcester - Fitchburg - Leominster	1,268,749
3. Springfield	878,582
4. New Bedford - Fall River - Attleboro	823,363
5. Pittsfield	<u>216,010</u>
Total	<u>9,692,268</u>
B. Connecticut	
1. Hartford - New Britain - Middletown - Bristol	2,093,619
2. Bridgeport - Stamford - Norwalk - Danbury	1,363,977
3. New Haven - Waterbury - Meriden	1,283,520
4. New London - Norwich	<u>436,610</u>
Total	<u>5,177,726</u>
C. Rhode Island	
1. Providence - Pawtucket - Woonsocket	Total <u>1,175,964</u>
D. New Hampshire	
1. Manchester - Nashua	788,877
2. Portsmouth - Dover - Rochester	<u>764,001</u>
Total	<u>1,552,878</u>
E. Maine	
1. Portland	470,952
2. Bangor	328,991
3. Lewiston - Auburn	<u>202,253</u>
Total	<u>1,002,196</u>
F. Vermont	
1. Burlington	Total 206,928

Retail Sales: Auto Dealers

Metro Area	Total Sales		Variance (%)
	<u>1990</u>	<u>1987</u>	
Massachusetts			
Total State	10,174,695	10,059,035	1.15%
Boston - Lawrence - Salem - Lowell - Brockton	6,505,564	6,469,538	0.56%
Essex	1,306,889	1,324,746	-1.35%
Middlesex	2,568,011	2,547,340	0.81%
Norfolk	1,418,325	1,369,522	3.56%
Plymouth	816,187	805,020	1.39%
Suffolk	396,152	422,910	-6.33%
New Bedford - Fall River - Attleboro	823,363	817,739	0.69%
Bristol	823,363	817,739	0.69%
Pittsfield	216,010	214,641	0.64%
Berkshire	216,010	214,641	0.64%
Springfield	878,582	860,937	2.05%
Hampden	716,784	704,531	1.74%
Hampshire	161,798	156,406	3.45%
Worcester - Fitchburg - Leominster	1,268,749	1,211,204	4.75%
Worcester	1,268,749	1,211,204	4.75%
All Counties			
Barnstable	359,766	363,220	-0.95%
Berkshire	216,010	216,641	-0.29%
Bristol	823,363	817,739	0.69%
Dukes	8,434	9,953	-15.26%
Essex	1,306,889	1,324,746	-1.35%
Franklin	99,496	98,775	0.73%
Hampden	716,784	704,531	1.74%
Hampshire	161,798	156,406	3.45%
Middlesex	2,568,011	2,547,340	0.81%
Nantucket	14,731	13,028	13.07%
Norfolk	1,418,325	1,369,522	3.56%
Plymouth	816,187	805,020	1.39%
Suffolk	396,152	422,910	-6.33%
Worcester	1,268,749	1,211,204	4.75%

Retail Sales: Auto Dealers

Connecticut

Total State	5,675,683	5,736,916	-1.07%
Bridgeport - Stamford - Norwalk - Danbury	1,363,977	1,428,550	-4.52%
Fairfield	1,363,977	1,428,550	-4.52%
Hartford - New Britain - Middletown - Bristol	2,093,619	2,063,739	1.45%
Hartford	1,597,330	1,588,462	0.56%
Middlesex	314,858	309,058	1.88%
Tolland	181,431	166,219	9.15%
New Haven - Waterbury - Meriden	1,283,520	1,289,075	-0.43%
New Haven	1,283,520	1,289,075	-0.43%
New London - Norwich	436,610	467,725	-6.65%
New London	436,610	467,725	-6.65%
All Counties			
Fairfield	1,363,977	1,428,550	-4.52%
Hartford	1,597,330	1,588,462	0.56%
Litchfield	370,980	354,415	4.67%
Middlesex	314,858	309,058	1.88%
New Haven	1,283,520	1,289,075	-0.43%
New London	436,610	467,725	-6.65%
Tolland	181,431	166,219	9.15%
Windham	126,977	133,412	-4.82%

Retail Sales: Auto Dealers

New Hampshire

Total State	2,658,458	2,475,659	7.38%
Manchester - Nashua	788,877	752,585	4.82%
Hillsborough	788,877	752,585	4.82%
Portsmouth - Dover - Rochester	764,001	720,398	6.05%
Rockingham	572,921	535,381	7.01%
Strafford	191,080	185,017	3.28%
All Counties			
Belknap	188,540	175,518	7.42%
Carroll	69,360	63,547	9.15%
Cheshire	143,993	134,397	7.14%
Coos	93,908	84,046	11.73%
Grafton	141,282	132,913	6.30%
Hillsborough	788,877	752,585	4.82%
Mereimack	410,097	356,726	14.96%
Rockingham	572,921	535,381	7.01%
Strafford	191,080	185,017	3.28%
Sullivan	58,400	55,529	5.17%

Retail Sales: Auto Dealers

Rhode Island

Total State	1,352,780	1,312,953	3.03%
Providence - Pawtucket - Woonsocket	1,175,964	1,142,110	2.96%
Bristol	53,545	53,071	0.89%
Kent	301,666	289,883	4.06%
Providence	690,435	665,122	3.81%
Washington	130,318	134,034	-2.77%
All Counties			
Bristol	53,545	53,071	0.89%
Kent	301,666	289,883	4.06%
Newport	176,816	170,843	3.50%
Providence	690,435	665,122	3.81%
Washington	130,318	134,034	-2.77%

Retail Sales: Auto Dealers

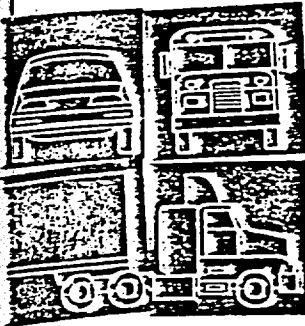
Vermont

Total State	930,607	937,167	-0.70%
Burlington	206,928	218,497	-5.29%
Chittenden	200,596	212,621	-5.66%
Grand Isle	6,332	5,876	7.76%
All Counties			
Addison	51,734	47,451	9.03%
Bennington	76,019	73,915	2.85%
Caledonia	40,060	41,652	-3.82%
Chittenden	200,596	212,621	-5.66%
Essex	867	822	5.47%
Franklin	62,578	62,379	0.32%
Grand Isle	6,332	5,876	7.76%
Lamoille	12,645	12,103	4.48%
Orange	15,575	15,312	1.72%
Orleans	40,823	39,374	3.68%
Rutland	135,701	136,852	-0.84%
Washington	95,845	99,359	-3.54%
Windham	71,954	69,641	3.32%
Windsor	119,878	119,810	0.06%

Retail Sales: Auto Dealers

Maine

Total State	2,110,594	1,976,534	6.78%
Bangor	328,991	302,820	8.64%
Penobscot	328,991	302,820	8.64%
Lewiston - Auburn	202,253	190,309	6.28%
Androscoggin	202,253	190,309	6.28%
Portland	470,952	452,341	4.11%
Cumberland	470,952	452,341	4.11%
All Counties			
Androscoggin	202,253	190,309	6.28%
Aroostook	130,122	120,842	7.68%
Cumberland	470,952	452,341	4.11%
Franklin	50,098	44,941	11.48%
Hancock	73,039	67,886	7.59%
Kennebec	250,051	231,862	7.84%
Knox	52,022	49,448	5.21%
Lincoln	45,525	41,658	9.28%
Oxford	42,691	43,881	-2.71%
Penobscot	328,991	302,820	8.64%
Piscataquis	17,294	16,785	3.03%
Sagadahoc	47,829	45,138	5.96%
Somerset	69,500	61,932	12.22%
Waldo	28,601	25,222	13.40%
Washington	22,921	22,268	2.93%
York	278,705	259,201	7.52%



More Motorists Than Ever Travel America; Women Drivers Dominate in Five States

If traffic seemed a little heavier in 1990 there was a good reason. The number of licensed drivers increased by 2.1 million to a record 167,655,000.

Male drivers outnumbered female motorists by 5.3 million. Five states — Delaware, Iowa, Kansas, Maine and Tennessee — showed female drivers outnumbering their male counterparts.

There were more drivers in the 25-29 age

bracket than in any other group documented by the U.S. Federal Highway Administration. Senior citizens age 65 and up accounted for 13 percent of the total.

LICENSED DRIVERS BY STATE, 1990*

State	Male (000)	Female (000)	Total (000)	State	Male (000)	Female (000)	Total (000)
Alabama	1,459	1,407	2,866	Nebraska	544	537	1,081
Alaska	166	136	302	Nevada	426	386	812
Arizona	1,242	1,179	2,421	New Hampshire	414	408	822
Arkansas	891	839	1,730	New Jersey	2,993	2,695	5,688
California	10,551	9,408	19,959	New Mexico	558	515	1,073
Colorado	1,140	993	2,133	New York	5,512	4,778	10,290
Connecticut	1,225	1,170	2,395	North Carolina	2,297	2,276	4,573
Delaware	242	245	487	North Dakota	216	210	426
Florida	4,891	4,322	9,213	Ohio	3,749	3,636	7,385
Georgia	2,246	2,201	4,447	Oklahoma	1,165	1,164	2,329
Hawaii	359	305	664	Oregon	1,161	1,055	2,216
Idaho	372	345	717	Pennsylvania	4,088	3,756	7,844
Illinois	3,713	3,564	7,277	Rhode Island	350	343	693
Indiana	1,980	1,880	3,860	South Carolina	1,195	1,188	2,383
Iowa	942	1,008	1,950	South Dakota	251	242	493
Kansas	858	873	1,731	Tennessee	1,726	1,751	3,477
Kentucky	1,246	1,177	2,423	Texas	5,743	5,394	11,137
Louisiana	1,300	1,282	2,582	Utah	522	519	1,041
Maine	448	451	899	Vermont	214	200	414
Maryland	1,605	1,558	3,163	Virginia	2,180	2,130	4,310
Massachusetts	2,228	2,115	4,343	Washington	1,698	1,621	3,319
Michigan	3,227	3,208	6,435	West Virginia	690	622	1,312
Minnesota	1,254	1,185	2,439	Wisconsin	1,699	1,615	3,314
Mississippi	955	919	1,874	Wyoming	178	163	341
Missouri	1,806	1,770	3,576	District of Columbia	217	180	397
Montana	328	271	599	TOTAL	86,460	81,195	167,655

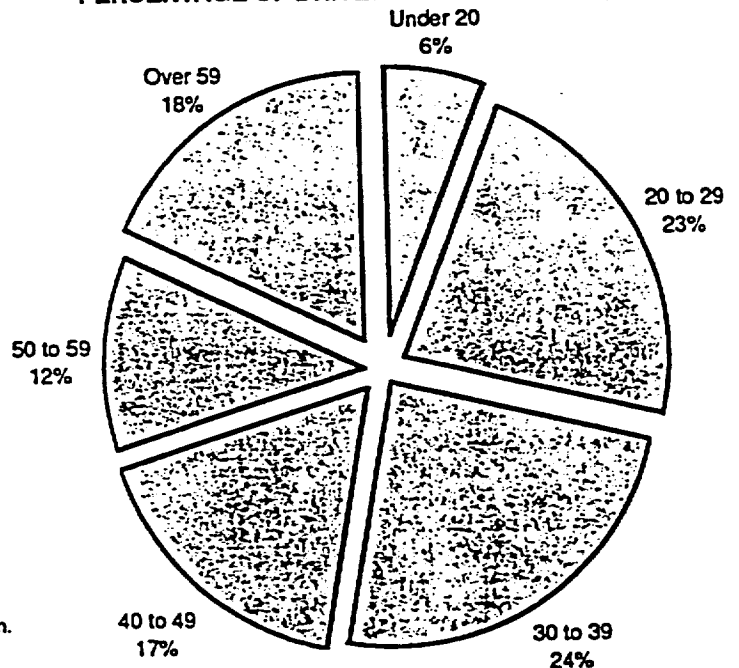
* Estimated.
SOURCE: U.S. Department of Transportation, Federal Highway Administration.

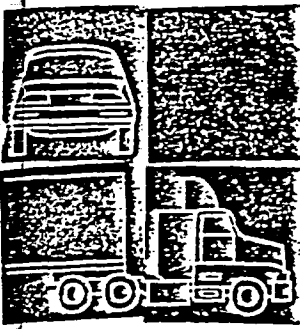
DRIVERS BY AGE GROUP AND SEX, 1990*

Age	Male (000)	Female (000)	Total (000)
Under 16	21	17	38
16	793	689	1,482
17	1,239	1,082	2,321
18	1,511	1,331	2,842
19	1,654	1,460	3,114
Under 20	5,218	4,579	9,797
20-24	8,939	8,180	17,119
25-29	10,744	10,083	20,827
30-34	10,654	10,120	20,774
35-39	9,579	9,216	18,795
40-44	8,338	7,986	16,324
45-49	6,535	6,209	12,744
50-54	5,356	5,033	10,389
55-59	4,978	4,649	9,627
60-64	4,845	4,587	9,432
65-69	4,290	4,080	8,370
70 and over	6,984	6,473	13,457
Total	86,460	81,195	167,655

* Estimated.
SOURCE: U.S. Department of Transportation, Federal Highway Administration.

PERCENTAGE OF DRIVERS BY AGE GROUP, 1990*





New Motor Vehicle Registrations Experience Decline in 1990

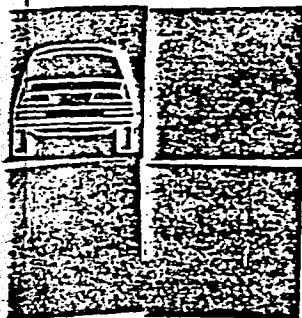
Total new motor vehicle registrations were down 6.6 percent from 1989. New passenger car registrations were 7 percent below last year and trucks declined 5.8 percent.

Of the 14 million new cars and trucks registered nationwide, two states saw registrations exceed a total of 1 million. California and Florida registered 1.6 million and 1 million, respectively.

NEW REGISTRATIONS BY STATE

	Passenger Cars		Motor Trucks		Total Motor Vehicles	
	1990	1989	1990	1989	1990	1989
Alabama	115,858	116,117	80,234	76,433	196,092	192,550
Alaska	15,392	15,092	19,018	16,077	34,410	31,169
Arizona	99,750	106,262	71,679	80,145	171,429	186,407
Arkansas	60,969	67,061	62,519	63,113	123,488	130,174
California	1,059,926	1,136,430	539,359	599,229	1,599,285	1,735,659
Colorado	113,468	121,577	74,673	73,541	188,141	195,118
Connecticut	140,759	164,983	46,456	58,592	187,215	223,575
Delaware	41,098	50,249	19,929	23,281	61,027	73,530
Florida	791,437	778,843	257,974	271,469	1,049,411	1,050,312
Georgia	231,902	251,579	132,466	146,024	364,368	397,603
Hawaii	71,950	59,893	25,804	24,592	97,754	84,485
Idaho	21,283	22,117	24,197	23,391	45,480	45,508
Illinois	534,199	568,394	218,553	230,963	752,752	799,357
Indiana	164,237	184,384	98,241	106,205	262,478	290,589
Iowa	74,012	83,488	57,537	59,277	131,549	142,765
Kansas	66,247	70,676	49,146	49,585	115,393	120,261
Kentucky	93,415	100,493	63,626	67,101	157,041	167,594
Louisiana	120,791	130,387	91,542	90,426	212,333	220,813
Maine	37,374	48,452	23,032	32,562	60,406	81,014
Maryland	258,085	281,218	106,412	116,819	364,497	398,037
Massachusetts	233,941	282,233	72,942	97,485	306,883	379,718
Michigan	424,359	460,463	226,201	232,227	650,560	692,690
Minnesota	135,109	158,267	87,827	99,847	222,936	258,114
Mississippi	53,937	63,814	46,325	49,555	100,262	113,369
Missouri	188,797	202,500	108,511	115,257	297,308	317,757
Montana	17,353	20,571	19,687	21,674	37,040	42,245
Nebraska	40,391	45,156	33,409	35,689	73,800	80,845
Nevada	53,407	50,968	31,325	31,296	84,732	82,264
New Hampshire	48,149	59,207	25,387	31,459	73,536	90,666
New Jersey	371,924	416,503	112,234	129,578	484,158	546,081
New Mexico	42,222	45,524	36,195	38,018	78,417	83,542
New York	584,112	647,582	201,880	219,865	785,992	867,447
North Carolina	212,443	245,257	122,916	145,399	335,359	390,656
North Dakota	14,033	15,499	13,036	14,274	27,069	29,773
Ohio	438,254	473,801	190,365	200,836	628,619	674,637
Oklahoma	80,060	81,899	74,661	72,906	154,721	154,805
Oregon	92,850	91,011	73,610	71,201	166,460	162,212
Pennsylvania	431,950	473,707	194,832	209,762	626,782	683,469
Rhode Island	34,178	41,484	10,811	14,480	44,989	55,964
South Carolina	113,503	120,349	70,816	68,061	184,319	188,410
South Dakota	16,429	17,729	15,606	15,934	32,035	33,663
Tennessee	153,731	179,877	95,390	109,686	249,121	289,563
Texas	562,775	566,688	410,133	392,795	972,908	959,483
Utah	41,357	41,699	34,931	34,468	76,288	76,167
Vermont	20,540	24,841	12,571	15,166	33,111	40,007
Virginia	241,201	262,240	117,108	131,301	358,309	393,541
Washington	135,284	130,606	99,138	93,085	234,422	223,691
West Virginia	51,029	54,871	37,884	36,895	88,913	91,766
Wisconsin	165,058	177,205	103,393	106,733	268,451	283,938
Wyoming	10,316	11,700	14,243	13,939	24,559	25,639
District of Columbia	18,245	20,787	3,303	3,283	21,548	24,070
Federal Government	20,540	10,884	46,017	39,216	66,557	50,100
GRAND TOTAL	9,159,629	9,852,617	4,805,084	5,100,195	13,964,713	14,952,812

SOURCE: R. L. Polk & Company. Permission for further use must be obtained from R. L. Polk & Company.



Per-Mile Operating Costs Up Slightly for 1991 Model Year

The cost of driving an intermediate-size 1991 model car rose to 43.6 cents per mile. That represents an increase of almost 3 cents per mile over a comparable 1990 model.

Variable expenses — fuel, tires and maintenance — ran 16.7 percent higher than the previous year at 9.8 cents per mile. Fixed costs averaged \$11.55 per day, up 93 cents from the previous year.

PASSENGER CAR OPERATING COSTS, 1950-1991

Year	Variable Costs In Cents Per Mile				Cost Per 10,000 Miles			Total Cost Per Mile
	Gas & Oil	Maintenance	Tires	Total	Variable Cost	Fixed Cost	Total Cost	
1991#	6.70¢	2.20¢	.90¢	9.80¢	\$980.00	\$3,384.00 ⁽⁴⁾	\$4,364.00	43.64¢
1990#	5.40	2.10	.90	8.40	840.00	3,256.00 ⁽⁴⁾	4,096.00	40.96
1989#	5.20	1.90	.80	7.90	790.00	3,030.00 ⁽⁴⁾	3,820.00	38.20
1988#	5.20	1.60	.80	7.60	760.00	2,581.00 ⁽⁴⁾	3,341.00	33.41
1987#	4.80	1.60	.80	7.20	720.00	2,544.00 ⁽⁴⁾	3,264.00	32.64
1986#	4.48	1.37	.67	6.52	652.00	2,307.00 ⁽⁴⁾	2,959.00	29.59
1985#	6.16	1.23	.65	8.04	804.00	1,916.00 ⁽⁴⁾	2,720.00	27.20
1984#	6.19	1.04	.63	7.86	786.00	2,346.00	3,132.00	31.32
1983#	6.64	1.04	.68	8.36	836.00	2,506.00	3,342.00	33.42
1981#	6.27	1.18	.72	8.17	817.00	2,375.00	3,192.00	31.92
1980#	5.86	1.12	.64	7.62	762.00	2,033.00	2,795.00	27.95
1979#	4.11	1.10	.65	5.86	586.00	1,811.00	2,397.00	23.97
1977#	4.11	1.03	.66	5.80	580.00	1,439.00	2,019.00	20.19
1975#	4.82	.97	.66	6.45	645.00	1,186.00	1,831.00	18.31
1973	3.35	.78	.62	4.75	475.00	1,172.00	1,647.00	16.47
1971	2.96	.73	.56	4.25	425.00	1,125.00	1,550.00	15.50
1969	2.76	.68	.51	3.95	395.00	1,053.00	1,448.00	14.48
1967	2.65	.68	.47	3.80	380.00	982.00	1,361.85	13.62
1965	2.58	.68	.44	3.70	370.00	807.00	1,177.00	11.77
1963	2.61	.68	.41	3.70	370.00	792.00	1,162.00	11.62
1960	2.62	.79	.49	3.90	390.00	808.54	1,198.54	11.99
1955	2.29	.74	.51	3.54	354.00	598.65	952.65	9.53
1950	2.14	.68	.46	3.28	328.00	533.02	861.02	8.61

ANNUAL FIXED COST OF OPERATING PASSENGER CAR, 1950-1991

Year	Insurance				License and Registration	Depreciation	Finance Charge	Total	Average Fixed Cost Per Day
	Fire & Theft ⁽¹⁾	Collision ⁽²⁾	Property Damage ⁽³⁾ & Liability						
1991#	\$115.00	\$258.00	\$353.00	\$169.00	\$2,543.00	\$779.00	\$4,217.00	\$11.55	
1990#	110.00	247.00	318.00	165.00	2,357.00	680.00	3,877.00	10.62	
1989#	109.00	245.00	309.00	151.00	2,094.00	626.00	3,534.00	9.68	
1988#	86.00	203.00	284.00	139.00	1,784.00	565.00	3,061.00	8.39	
1987#	87.00	196.00	252.00	140.00	1,506.00	601.00	2,782.00	7.62	
1986#	86.00	191.00	232.00	130.00	1,320.00	637.00	2,596.00	7.11	
1985#	92.00	198.00	213.00	115.00	1,253.00	570.00	2,441.00	6.69	
1984#	80.00	200.00	225.00	106.00	1,207.00	528.00	2,346.00	6.43	
1983#	80.00	201.00	222.00	102.00	1,343.00	558.00	2,506.00	6.87	
1981#	76.00	180.00	254.00	88.00	1,287.00	490.00	2,375.00	6.51	
1980#	70.00	172.00	248.00	82.00	1,038.00	423.00	2,033.00	5.57	
1979#	74.00	168.00	241.00	90.00	942.00	296.00	1,811.00	4.96	
1977#	80.00	188.00	250.00	74.00	847.00	-	1,439.00	3.94	
1975#	53.00	141.00	189.00	30.00	773.00	-	1,186.00	3.25	
1973	45.00	143.00	179.00	28.00	777.00	-	1,172.00	3.21	
1971	62.00	125.00	175.00	25.00	738.00	-	1,125.00	3.08	
1969	44.00	102.00	154.00	24.00	729.00	-	1,053.00	2.88	
1967	39.00	85.00	148.00	26.00	684.00	-	982.00	2.69	
1965	31.00	-	126.00	24.00	626.00	-	807.00	2.21	
1963	30.00	-	117.40	23.60	621.00	-	792.00	2.17	
1960	30.38	-	109.76	22.40	646.00	-	808.54	2.22	
1955	17.81	-	86.65	16.83	477.36	-	598.65	1.64	
1950	15.79	-	59.71	15.47	442.05	-	533.02	1.46	

(1) No deductible prior to 1973; \$50 deductible 1973 through 1977; \$100 deductible 1978 through 1991.

(2) \$100 deductible 1967 through 1977; \$250 deductible 1978 through 1991.

(3) Coverage: 1949 to 1965-\$15,000/\$30,000; 1957 to 1965-\$25,000/\$50,000; 1968 to 1991-\$100,000/\$300,000.

(4) Not comparable to previous data. Ownership costs are based on a six-year or 60,000-mile retention cycle.

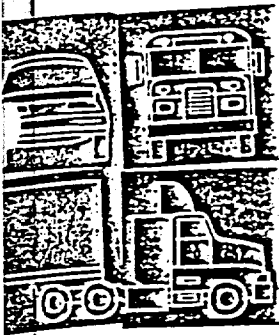
Vehicle specified for 1974 and later years is an intermediate. Prior to 1974 full sized vehicles were specified.

SOURCE: The data were extracted from various issues of "Your Driving Costs" published by the American Automobile Association. Primary source of the data is Runzheimer International.

Miles-Traveled Mark Tops 2 Trillion for Third Year

Motorists topped the 2 trillion miles-traveled mark in 1990 for the third consecutive year. The 1990 preliminary figures reflect an additional 43 billion miles traveled over the previous year.

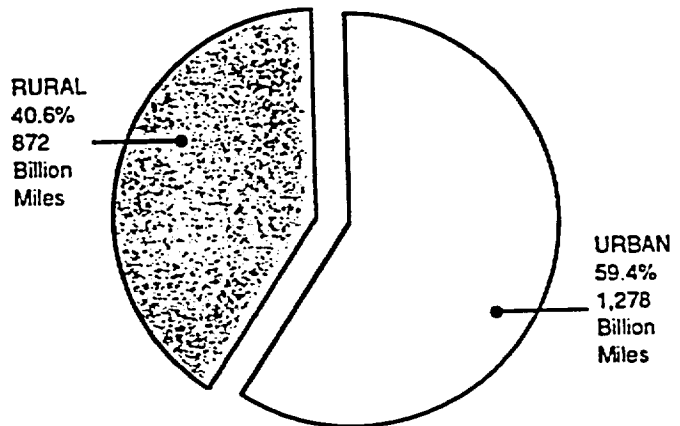
As expected, California drivers tallied the most miles, 251.5 billion. Only three other states topped 100 billion miles — Texas, Florida and New York.



VEHICLE MILES OF TRAVEL, 1989 (In Millions)

State	Rural	Urban	Total
Alabama	21,789	18,976	40,765
Alaska	2,205	1,682	3,887
Arizona	14,659	20,157	34,816
Arkansas	12,988	7,426	20,414
California	52,039	199,443	251,482
Colorado	11,865	15,712	27,577
Connecticut	6,596	19,587	26,183
Delaware	2,900	3,546	6,446
Florida	31,385	77,492	108,877
Georgia	33,769	41,936	75,705
Hawaii	2,445	5,305	7,750
Idaho	5,739	2,683	8,422
Illinois	25,478	55,819	81,297
Indiana	32,090	24,102	56,192
Iowa	14,505	8,066	22,571
Kansas	12,364	9,549	21,913
Kentucky	18,826	13,339	32,165
Louisiana	18,180	19,734	37,914
Maine	8,593	3,146	11,739
Maryland	13,311	25,611	38,922
Massachusetts	8,534	37,680	46,214
Michigan	31,453	48,437	79,890
Minnesota	17,965	19,428	37,393
Mississippi	15,429	7,466	22,895
Missouri	23,279	24,808	48,087
Montana	6,256	1,994	8,250
Nebraska	8,713	5,068	13,781
Nevada	4,198	5,210	9,408
New Hampshire	6,101	3,718	9,819
New Jersey	11,073	48,825	59,898
New Mexico	9,503	6,336	15,839
New York	31,001	75,058	106,059
North Carolina	32,874	28,003	60,877
North Dakota	4,285	1,564	5,849
Ohio	34,452	49,966	84,418
Oklahoma	16,259	16,577	32,836
Oregon	14,192	11,628	25,820
Pennsylvania	37,839	46,016	83,855
Rhode Island	889	5,851	6,740
South Carolina	21,165	11,615	32,780
South Dakota	5,157	1,547	6,704
Tennessee	22,151	23,488	45,639
Texas	53,693	105,819	159,512
Utah	5,376	8,539	13,915
Vermont	4,204	1,561	5,765
Virginia	27,501	31,836	59,337
Washington	15,861	27,372	43,233
West Virginia	10,564	4,376	14,940
Wisconsin	22,798	20,288	43,086
Wyoming	4,392	1,358	5,750
District of Columbia	-	3,414	3,414
Total 1989	848,883	1,258,157	2,107,040
Total 1990 (Prelim)	872,000	1,278,000	2,150,000

MOTOR VEHICLE MILES OF TRAVEL BY AREA, 1990



ANNUAL VEHICLE MILES TRAVELED BY MOTOR VEHICLES (In Billions)

Year	Miles	Year	Miles	Year	Miles
1990	2,150	1975	1,328	1960	719
1989	2,107	1974	1,281	1959	700
1988	2,026	1973	1,313	1958	665
1987	1,921	1972	1,260	1957	647
1986	1,835	1971	1,179	1956	628
1985	1,774	1970	1,110	1955	603
1984	1,720	1969	1,062	1954	561
1983	1,653	1968	1,016	1953	544
1982	1,595	1967	964	1952	514
1981	1,553	1966	926	1951	491
1980	1,527	1965	888	1950	458
1979	1,529	1964	846	1949	424
1978	1,545	1963	805	1948	398
1977	1,467	1962	767	1947	371
1976	1,402	1961	738		

* Includes motorcycles.

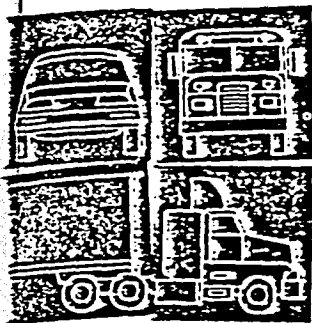
SOURCE: U.S. Department of Transportation, Federal Highway Administration.

TRANSPORTATION TO WORK BY MODE, 1985

Mode	Average One-Way Distance Traveled (miles)	Average One-Way Commute Time (minutes)
Car, Truck or Van	11.36	19.01
Bus or Streetcar	8.68	38.27
Subway or Elevated Rail	6.70	27.62
Railroad	24.82	64.33
Taxicab	2.92	12.66
Motorcycle	9.62	16.45
Bicycle	2.06	13.76
Other Vehicle	6.25	23.23
Walked Only	0.19	8.33
Total	10.73	19.66

SOURCE: U.S. Department of Energy, Transportation Energy Data Book: Edition 11, 1991.

SOURCE: U.S. Federal Highway Administration — Table VM-2, and Traffic Volume Trends.



Americans Take to the Roads With Over 2 Trillion Miles Driven

Odometer readings clicked for 2.1 trillion miles in the United States in 1990. Gas tanks took an average of 683 gallons, a five-gallon decline from the previous year.

The number of miles traveled per vehicle in 1989 continued its steady growth, with an average 10,382 miles added to each car and 13,901 miles to each truck. The average miles traveled for all motor vehicles, 10,992, shows a 2.5 percent gain since 1988.

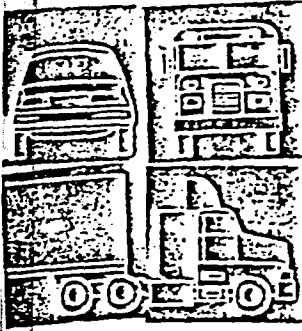
Total gas consumption continued to rise as service station operators and drivers themselves pumped an estimated 132.8 billion gallons of fuel in 1990.

VEHICLE MILES OF TRAVEL AND FUEL CONSUMPTION

	PASSENGER VEHICLES				TRUCKS				All Motor Vehicles
	Passenger Cars	Motorcycles	Buses	Total	2-Axle 4-Tire	Other Single Unit	Trailer Combinations	Total	
VEHICLE MILES OF TRAVEL (In Millions)									
1990 Prelim.	-	-	-	-	-	-	-	-	2,149,457
1989	1,485,474	10,425	5,685	1,501,584	456,699	53,190	95,567	605,456	2,107,040
1988	1,429,579	10,024	5,466	1,445,069	439,496	51,239	90,158	580,893	2,025,962
1987	1,355,330	9,506	5,318	1,370,154	415,449	49,537	86,064	551,050	1,921,204
1985	1,260,565	9,086	4,876	1,274,527	373,072	46,980	79,600	499,652	1,774,179
1980	1,111,596	10,214	6,059	1,127,869	290,935	39,813	68,678	399,426	1,527,295
1975	1,033,950	5,629	6,055	1,045,634	200,700	34,606	46,724	282,030	1,327,664
1970	916,700	2,979	4,544	924,223	123,286	27,081	35,134	185,501	1,109,724
1960 ⁽¹⁾	588,083	(2)	4,353	592,436	-	-	-	126,409	718,845
1950	363,613	(2)	4,081	367,694	-	-	-	90,552	458,246
1940	249,600	(2)	2,657	252,257	-	-	-	49,931	302,188
AVERAGE ANNUAL MILES TRAVELED PER VEHICLE									
1989	10,382	2,351	9,095	10,136	12,062	12,964	60,132	13,901	10,992
1988	10,121	2,187	8,878	9,867	11,848	12,948	61,073	13,659	10,720
1987	9,878	1,933	8,833	9,600	11,591	12,755	60,634	13,393	10,449
1985	9,560	1,669	8,216	9,242	11,016	11,962	56,725	12,747	10,018
1980	9,141	1,794	11,458	8,824	10,437	9,103	48,472	11,864	9,458
1975	9,690	1,134	13,102	9,325	9,829	8,178	41,321	10,940	9,627
1970	10,272	1,055	12,035	9,998	8,676	7,356	38,819	9,869	9,976
1960 ⁽¹⁾	9,446	(2)	16,004	9,474	-	-	-	10,583	9,652
1950	9,020	(2)	20,910	9,078	-	-	-	10,776	9,369
1940	9,080	(2)	18,580	9,129	-	-	-	10,626	9,347
FUEL CONSUMED (Millions of Gallons)									
1990 Prelim.	-	-	-	-	-	-	-	-	132,764
1989	72,333	209	949	73,490	32,068	7,415	17,892	58,374	131,865
1988	71,949	200	921	73,071	32,803	7,260	17,123	57,186	130,056
1987	70,573	190	903	71,666	32,266	7,091	16,493	55,850	127,515
1985	69,268	182	835	70,285	29,021	6,735	15,280	51,037	121,322
1980	71,883	204	1,018	73,106	23,594	5,557	12,703	41,854	114,960
1975	76,447	113	1,053	77,613	17,903	4,815	8,654	31,371	108,984
1970	67,820	60	820	68,699	12,313	3,968	7,348	23,630	92,329
1960 ⁽¹⁾	41,169	(2)	827	41,996	-	-	-	15,882	57,878
1950	24,305	(2)	732	25,037	-	-	-	10,566	35,603
1940	16,323	(2)	436	16,759	-	-	-	5,156	21,915
AVERAGE FUEL CONSUMPTION PER VEHICLE (Gallons)									
1990 Prelim.	-	-	-	-	-	-	-	-	683
1989	506	47	1,518	496	873	1,807	11,258	1,340	688
1988	509	44	1,496	499	884	1,834	11,599	1,345	688
1987	514	39	1,500	502	900	1,826	11,620	1,357	694
1985	525	33	1,407	510	857	1,715	10,889	1,302	685
1980	591	36	1,926	572	846	1,271	8,966	1,243	712
1975	716	23	2,279	692	877	1,138	7,653	1,217	790
1970	760	21	2,172	743	866	1,078	8,119	1,257	830
1960 ⁽¹⁾	661	(2)	3,040	672	-	-	-	1,330	777
1950	603	(2)	3,752	618	-	-	-	1,257	728
1940	594	(2)	3,049	607	-	-	-	1,097	678

- Not Available. (1) Alaska and Hawaii included since 1959. (2) Motorcycles are included in passenger cars.

SOURCE: U.S. Department of Transportation, Federal Highway Administration, *Highway Statistics*, annual.



One Third of all Households Have One Car; Another Third With Two Vehicles

Thirty-four percent of all households in the United States have one vehicle in the driveway. Another 36.5 percent are two-vehicle households. The rest of the population is split between no vehicles at all, 13 percent, and three or more vehicles, 16.4 percent.

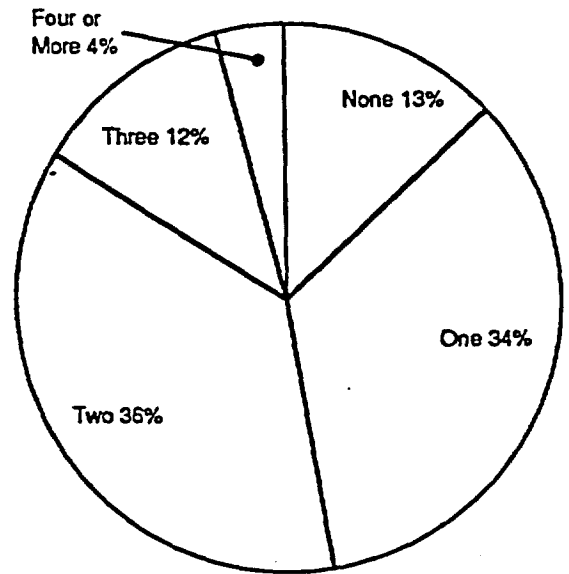
household totaled 18,595. Of the 91.6 million total households in the United States, 81.3 million have vehicles.

The average number of miles traveled per household vehicle in 1988 was 10,246; the average number of miles traveled per

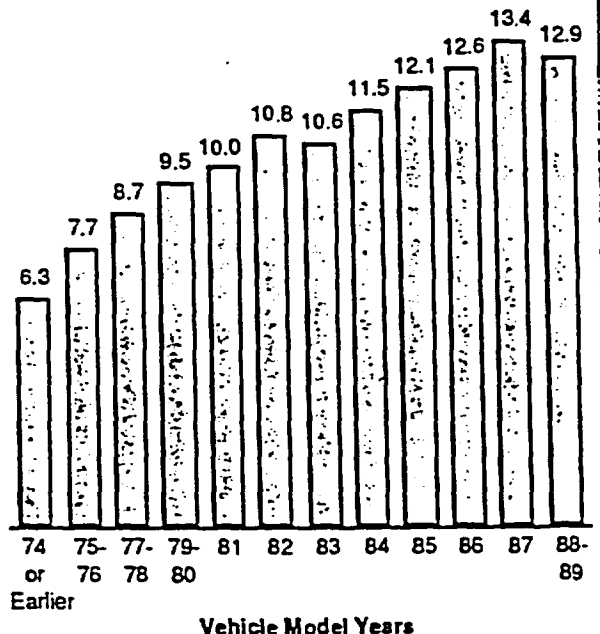
VEHICLE CHARACTERISTICS BY CENSUS REGION, 1988

Characteristic	Census Region				U.S. Total
	Northeast	Midwest	South	West	
Number of Households With Vehicles (Million)	15.2	20.4	28.3	17.3	81.3
Number of Vehicles (Million)	26.6	37.8	50.6	32.5	147.5
Number of Vehicles Per Household	1.7	1.8	1.8	1.9	1.8
Household Vehicles by Model Year (Percent)					
1986 - 1989	28%	22%	24%	20%	23%
1981 - 1985	40	35	34	30	35
1975 - 1980	24	32	29	29	29
1974 or Earlier	8	11	12	21	13
Total	100%	100%	100%	100%	100%
Vehicle Miles Traveled (Billion)	274	379	534	325	1,511
Vehicle Miles Traveled Per Household	17,997	18,518	18,859	18,783	18,595
Vehicle Miles Traveled Per Vehicle	10,311	10,021	10,550	9,980	10,246
Vehicle Fuel Consumption (Billion Gallons)	14.0	20.8	29.6	18.1	82.4
Vehicle Fuel Efficiency (Miles Per Gallon)	19.6	18.2	18.0	18.0	18.3
Vehicle Fuel Expenditures (Billion Dollars)	\$ 14.2	\$ 20.4	\$ 29.1	\$ 17.5	\$ 81.1

HOUSEHOLD OWNERSHIP OF VEHICLES, 1988 (Percent of Households)



AVERAGE MILES TRAVELED PER VEHICLE IN 1988 BY MODEL YEAR (In Thousands)



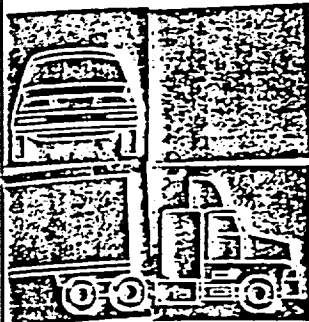
VEHICLE OWNERSHIP BY HOUSEHOLD INCOME, 1988

Number of Vehicles	Under \$10,000	\$10,000- \$19,999	\$20,000- \$34,999	\$35,000- \$49,999	\$50,000 or More	All Households
None	39.6%	14.3%	6.6%	2.2%	2.2%	13.1%
One	42.7	47.8	34.8	18.2	15.3	34.1
Two	14.6	28.5	43.2	52.3	48.2	36.5
Three or More	3.1	9.4	15.4	27.3	34.3	16.4
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

VEHICLE MILES TRAVELED BY HOUSEHOLD VEHICLES, 1988

	1983	1985	1988
Number of Households (Million)	84.4	87.3	91.6
Number of Households with Vehicles (Million)	72.2	77.7	81.3
Number of Vehicles (Million)	129.3	137.3	147.5
Vehicle Miles Traveled (Billion)	1,215	1,353	1,511
Vehicle Miles Traveled Per Household with Vehicles	16,830	17,402	18,595
Vehicle Miles Traveled Per Vehicle	9,399	9,855	10,246

SOURCE: U.S. Department of Energy, Energy Information Administration, *Household Vehicles Energy Consumption, 1988*.



Two Cars in the Garage, A Third in the Driveway – Multi-Vehicle Households Mount Steady Gains

Over two thirds of all households in the United States have one or two motor vehicles.

There are nearly 6 million households with three vehicles and 2.7 million households have four or more vehicles.

Minivans recorded the highest average annual miles traveled by vehicle type in

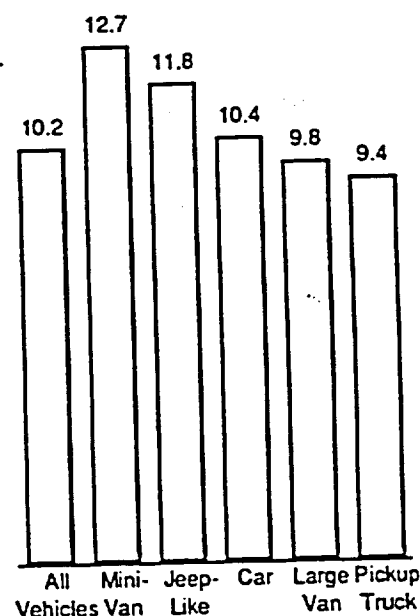
1988. They averaged 12,650 miles per vehicle while passenger cars traveled 10,372 miles and pickup trucks 9,433.

HOUSEHOLD OWNERSHIP OF MOTOR VEHICLES, 1988

Characteristic	Number of Households (Million)	Average Per Household		
		Number of Vehicles	Vehicle Miles Traveled	Fuel Consumption (Gallons)
Average Number of Vehicles Per Household:				
Fewer than 1	3.9	.6	5,271	316
1	24.5	1.0	10,170	526
Between 1 and 2	9.1	1.5	17,049	936
2	24.3	2.0	20,251	1,100
Between 2 and 3	8.2	2.4	25,456	1,386
3	5.9	3.0	28,995	1,614
Between 3 and 4	2.8	3.4	36,820	2,078
4 or more	2.7	4.3	42,332	2,407
Census Region:				
Northeast	15.2	1.7	17,997	917
Midwest	20.4	1.8	18,518	1,016
South	28.3	1.8	18,859	1,046
West	17.3	1.9	18,783	1,046
Metropolitan Status:				
Metropolitan	63.0	1.8	18,586	995
Central City	24.0	1.6	15,669	852
Outside Central City	39.0	1.9	20,385	1,083
Nonmetropolitan	18.3	1.8	18,627	1,081
Household Size:				
1 Person	16.9	1.2	10,813	586
2 Persons	28.6	1.8	16,817	928
3 Persons	14.2	2.0	22,679	1,209
4 Persons	12.6	2.1	23,323	1,257
5 or More Persons	8.9	2.3	25,930	1,449
1987 Family Income:				
Less than \$10,000	10.2	1.3	10,932	652
\$10,000-\$14,999	11.8	1.4	12,978	762
\$15,000-\$19,999	8.3	1.6	15,837	879
\$20,000-\$24,999	8.6	1.7	17,813	980
\$25,000-\$34,999	16.0	1.8	18,617	1,025
\$35,000-\$49,999	12.9	2.2	24,170	1,275
\$50,000-\$74,999	8.8	2.3	25,555	1,330
\$75,000 or More	4.5	2.4	27,428	1,391
U.S. TOTAL	81.3	1.8	18,595	1,014

SOURCE: U.S. Department of Energy, Energy Information Administration, *Household Vehicles Energy Consumption, 1988*.

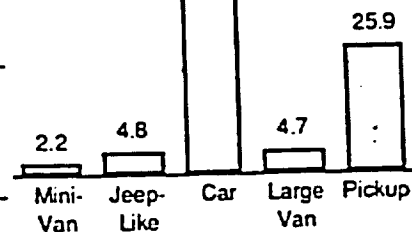
AVERAGE MILES TRAVELED BY VEHICLE TYPE, 1988 (In Thousands)



NUMBER OF HOUSEHOLD VEHICLES (In Millions)

HOUSEHOLD TRAVEL BY TYPE OF VEHICLE, 1988

Vehicle Type	Number of Vehicles (Million)	Annual Vehicle Miles (Billion)	Average Miles Traveled (Per Vehicle)	Fuel Consumption (Billion Gallons)	Fuel Expenditures (Billion)
Passenger Car	109.3	1,134	10,372	57.5	\$57.1
Jeep-Like Vehicle	4.8	56	11,843	3.7	3.6
Mini Van	2.2	28	12,650	1.4	1.4
Large Van	4.7	46	9,774	3.5	3.3
Pickup Truck	25.9	244	9,433	15.9	15.3



SOURCE: U.S. Department of Energy, Energy Information Administration, *Household Vehicles Energy Consumption, 1988*.

Auto Alternarket
Profile

Auto Aftermarket Profile: Contents

Note: The following pages will reflect conflicting projections and different category groupings, depending on the organization.

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Auto Aftermarket Products & Services Source: Motor & Equipment Manufacturers Association (MEMA)

- 1991 Auto Aftermarket (End User Sales) \$110 Billion (Products & Services) (+3.2V%)
- 1990 Auto Aftermarket Products & Services \$107 Billion

	<u>1991</u>	<u>1990</u>
Products	\$82.6B	\$81.2B
Services	\$28.0B	\$26.1B

- Services: 25.3% of all expenditures
- Excludes:
 1. Tires
 2. Body Parts
 3. Sound Accessories
 4. Fuel
- Includes:
 1. Passenger Cars
 2. Light & Heavy Duty Trucks
 3. Buses
 4. Off-Road Vehicles
 5. Farm Machinery
 6. Other Engines

Product Categories

1. Accessories
2. Chemicals
3. Hard Parts

Accessories

1. Battery Chargers
2. Bedliners
3. Bug/Gravel Deflectors
4. Dash Covers
5. Floor Mats
6. Hand Held Power Washers
7. Car Top Carriers/
Roof Rack Systems
8. Pinstriping/Graphics
9. Running Boards
10. Seat Covers
11. Mechanical Security
12. Window Film

Chemicals

1. Additives
2. All-Purpose Cleaners
3. Antifreeze
4. Maintenance Products
5. Motor Oil
6. Performance/Service
Chemicals
7. Surface Treatment/
Protectants
8. Waxes & Polishes

Hard Parts

1. Batteries
2. Belts & Hoses
3. Brake Products
4. Exhaust Parts
5. Filter Headlamps
6. Spark Plug/Ignition Parts
7. Shocks & Struts
8. Tires
9. Wiper Blades

Source: Aftermarket Business 4/1/92 Car Car Study

Motor Vehicle Parts Shipments (U.S. Dept. of Commerce)
(Includes both Original & Replacement Parts)

	(Billions)	
	<u>1982</u>	<u>1989</u>
Gasoline Engines & Parts	\$8.3	\$15.3
Filters	1.0	1.6
Exhaust Systems	1.7	2.9
Drive Trains	9.8	17.1
Brakes	2.2	4.5
Wheels	0.8	1.6
Rebuilt	0.9	1.4
All other	<u>13.7</u>	<u>21.3</u>
Total Shipments	\$38.4B	\$65.7B

Aftermarket Categories (APAA)

- 1. Replacement Part
- 2. Replacement Glass
- 3. Tires
- 4. Auto Accessories
- 5. Motor Oil
- 6. Auto Chemicals
- 7. Service Repair

<u>General Categories</u>	<u>(Billions)</u>		<u>10 yr. Avg. Annual Growth Rate (AAGR)</u>
	<u>1981</u>	<u>1990</u>	
Replacement Parts	\$36.3	\$47.0	2.95%
Replacement Glass	0.9	2.4	16.67
Tires	11.7	15.0	2.82
Auto Accessories	6.3	11.9	8.89
Motor Oil	4.1	3.6	(1.22)
Auto Chemicals	2.6	2.6	- 0 -
Service Repair	34.8	76.8	12.07
Total Sales	\$96.7B	\$159.3B	6.47%

(Source: APAA Aftermarket Factbook (1992))

Size of the 1991 Automotive Aftermarket (in billions of 1991 retail dollars)

Replacement Parts	<u>\$ Billion</u>
Batteries	3.91
Brake Systems	2.90
Drums and Rotors	.53
Brake Hardware	.11
Hydraulic Parts	.87
Friction Material	1.39
Drive Train Parts	4.9
Axles	.83
Clutches and Parts	1.77
CV Joints	.73
Transmissions	1.19
U Joints	.38
Electrical Systems	3.28
Conventional Ignition	.72
Electronic Ignition	.44
Starters, Alternators, Generators	1.15
Switches	.32
Wire and Cable	.64
Engine Parts	1.19
Exhaust Systems	1.93
Filters	2.72
Fuel System Parts	1.87
Carburetors	.77
Emission Control Systems	.36
Fuel Injection Systems	.44
Fuel Pumps	.30
Heating and Cooling Systems	2.27
Air Conditioning Compressors and Parts	.91
Radiators	.73
Water Pumps	.41
Other	.22
PCV Valves	.03
Shock Absorbers	.72
Struts and Lift Supports	.52
Steering and Suspension	.93
Spark Plugs	1.24
Wheel Bearings	.25
Wheel Seals	.08
Other Replacement parts	<u>11.62</u>
Total Replacement Parts	40.36

(APAA estimate from Department of Commerce data. Includes engines, miscellaneous engine accessories, vehicular lighting.)

Size of the 1991 Automotive Aftermarket (contd.)

Replacement Parts	<u>\$ Billion</u>
Replacement Glass	2.16
Replacement Tires	14.14
Accessories	10.89
Motor Oil	3.20
Automotive Chemicals	2.80
Functional Chemicals	1.21
Maintenance Chemicals	.98
Appearance Chemicals	.60
Service Repair	<u>74.30</u>
Total Aftermarket	147.85

Source: APAA

Automotive Parts Imports (Source: U.S. Dept. of Commerce)

		<u>1990 (\$ Billion)</u>
1. North America	• Canada	\$ 9.2 (#2 source for Auto Parts)
	• Mexico	4.5
2. Asia	• Japan	10.6
	• Korea	0.6
	• Taiwan	0.7
3. W. Europe	• France	0.8
	• Germany	2.0
	• Italy	0.4
	• Spain	0.3
	• U.K.	0.6
4. Latin America	• Brazil	0.7
5. All Others		1.7
Total		\$32.1 Billion

Aftermarket Category Segmentation

I. Products

II. Services

I. Products

A. Hard Parts

B. Accessories

C. Chemicals

A. Hard Parts

B. Accessories

- 1. Exterior
- 2. Interior
- 3. Electrical
- 4. Performance

1. Exterior

- 1. Wheel Covers — A. Auto — Metal — Size
B. Truck/Van — ABS — Performance — Size
— Custom — of wheel — Slotted
Directional
- 2. Auxiliary Lighting, Bulbs & Accessories
- 3. Car Care Accessories (Covers, Vacs, Cleaning Tools)
- 4. Trailer Accessories

- 5. Antennas — Auto — 1 section — Body/Roof
CB — 3 section — Fender
Masts — Pillar mount
Electronic
- 6. Tie Downs
- 7. License Plates Frames & Fasteners
- 8. Exterior Accessories (Guards, Reflectors, Feelers)
- 9. Mirrors

2. Interior

- 1. Steering Wheel covers — Car/Auto — Std.
Truck/Van — Deluxe
Terry cloth
Sheepskin
- 2. Mirrors (Rear View, Vanity)
- 3. Interior Lights & Bulbs
- 4. Interior Accessories (Key Holders, shifters, knobs, Pedals, Ashtrays, Faces, Litter Bags, compass, etc.)

3. Performance

- 1. Oil change & lube
- 2. Batteries & Accessories
- 3. Air cleaners
- 4. Cooling Systems & Accessories
- 5. Gauges & Controls
- 6. Tire Accessories
- 7. Tools

4. Electrical

- 1. Wire
- 2. Fuses
- 3. Trailer Connections
- 4. Accessories (Testers, Wiring Kits, clips, plugs)

Product Categories (As listed by the Automotive Parts & Accessories Association)

- 1. Air Fresheners
- 2. Antennas
- 3. Audio Systems
- 4. Batteries
- 5. Bearings
- 6. Belts, Hoses, Wiper Blades
- 7. Body Repair
- 8. Body Trim/Moldings
- 9. Brake System Components
- 10. Bumper Guards
- 11. Cans (Oil, Gas, Fuel)
- 12. Carpets
- 13. Carriers (Car Top, Luggage, Tire)
- 14. Chains
- 15. Chemicals:
 - Air Conditioning
 - Anti-Freeze
 - Carburetor Cleaner
 - Cooling System
 - De-Icer
 - Engine
 - Fuel System
 - Parts Cleaner
 - Refrigerants
 - Rust-Proofing
 - Sealers
 - Starting Fluid
 - Tar Remover
 - Tire Sealant/Inflator
 - Transmission
 - Undercoating
- 16. Clocks & Compasses
- 17. Clutches
- 18. Cooling System Components
- 19. Cords (Tie Downs, Ropes, Straps)
- 20. Covers (Car, Fender, Steering Wheel, Dash, Seat)
- 21. Decals
- 22. Deflectors & Screens
- 23. Defoggers & Defrosters
- 24. Drive Train & Transmission Components
- 25. Electrical Lighting
- 26. Electrical Wiring:
 - Circuit Breakers
 - Connectors
 - Flashers
 - Fuses
 - Switchers
- 27. Emission Control System Components
- 28. Engine Hard Parts
- 29. Exhaust System Components
- 30. Fender Flares & Spoilers
- 31. Filters
- 32. Fuel System Components
- 33. Gaskets & Seals
- 34. Gauges
- 35. Glazing
- 36. Hardware/Fasteners
- 37. High Performance Products
- 38. Horns
- 39. Hubcaps
- 40. Ignition System Components:
 - Distributor Caps
 - Electronic Control Modules
 - Ignition Coils/Switches
 - Spark Plugs/Spark Plug Wires
- 41. Import Car Parts
- 42. Lifting Equipment
- 43. Litter Baskets & Containers
- 44. Louvers & Sunshades
- 45. Lubricants & Oil:
 - Motor Oil
 - Penetrating Oil
 - General Purpose Oil
 - Grease
- 46. Mats
- 47. Mirrors
- 48. Mobile Cellular Phones
- 49. Motorcycle & Moped Parts & Accessories
- 50. Novelties, Ornaments, Keychains
- 51. Off Road Components
- 52. Paints, Enamels, Lacquers
- 53. Personal Items (Maps, Sunglasses, Clothing)
- 54. R.V. & Trailer Equipment
- 55. Radar Detectors
- 56. Radios & Accessories
- 57. Repair Manuals
- 58. Running Boards
- 59. Safety Equipment (Fire Extinguishers, Helmets)
- 60. Security/Alarm Systems
- 61. Shifters
- 62. Speed Controls

63. Splash Guards
64. Steering & Suspension Components
65. Sunroofs
66. Tape
67. Test/Tune Equipment
68. Tools (Hand & Power)/Tool Boxes
69. Towing Equipment
70. Truck and Van Parts & Accessories
71. Washing & Cleaning:
 - Chamois
 - Sponges
 - Spray Wash
 - Towels, Brushes, Scrapers, Squeegees
 - Soap
 - Wax
 - Polish
 - Vacuum Cleaner
 - Chrome Cleaner
 - Vinyl Cleaner
 - Tire & Whitewall Cleaner
 - Upholstery Cleaner
 - Glass Cleaner
 - Sealers & Protectors
72. Wheels & Accessories

Total Aftermarket & Retail Sales: 1991

Source: Aftermarket Business 4/1/92 Car Care Center Study

	<u>1991 Total Aftermarket Sales (M)</u>	<u>1991 Retail Chain Sales (M)</u>	<u>% Total</u>
1. Additives (Chemicals)	\$1650.0	\$1270.0	76.9%
2. All Purpose Cleaners	31.6	20.5	64.9
3. Antifreeze/Coolants	1900.0	1400.0	73.7
4. Batteries	7200.0	2700.0	37.5
5. Bedliners	97.0	58.0	59.8
6. Brake Products	2900.0	647.0	22.3
7. Car Wash Products	45.0	41.0	91.1
8. DIY Books	60.8	52.3	86.0
9. Filters (Air, Fuel, Oil)	2100.0	767.0	36.5
10. Floor Mats	215.0	160.0	74.4
12. Hand Cleaners	42.6	18.0	42.2
12. Hand Tools	852.0	511.0	60.0
13. Headlamps	247.0	142.0	57.4
14. Lift Supports	64.8	43.9	67.6
15. Mechanical Security	135.0	121.5	90.0
16. Motor Oils	3200.0	2300.0	68.7
17. Performance/Service Chemicals	36.4	29.1	79.9
18. Roof Racks	35.5	NA	NA
19. Running Boards	94.0	60.8	64.7
20. Shocks & Struts	1500.0	697.0	46.5
21. Spark Plugs	672.0	235.0	35.0
22. Surface Treatments/Protectants	267.0	210.0	78.6
23. Tire Care	27.9	23.5	84.0
24. Tire Inflators	55.6	47.3	85.0
25. Touch Up Paint	254.0	164.5	64.6
26. Waxes & Polishes	250.0	187.0	74.8
27. Wiper Blades	405.0	141.0	34.8
	<u>\$24.3 Billion</u>	<u>\$12.0 Billion</u>	<u>49.4%</u>

1991 Sales Growth, Turns, Gross Margin by Category

Source: Aftermarket Business 4/1/92 Car Care Center Study

	Sales Growth		Avg. Annual turns		Avg. Gross Margin (%) (Retailers)	
	1990 - 1991	1989 - 1990	1991	1990	1991	1990
1. Additives (Chemicals)	+3.7%	+9.1%	7.2	6.1	35.0%	41.1%
2. All Purpose Cleaners	+1.9%	+3.4%	5.7	4.1	23.9	37.5
3. Antifreeze/Coolants	+0.6%	+1.5%	10.2	5.4	25.0	20.4
4. Batteries	+2.8%	+7.7%	6.8	5.8	22.4	26.4
5. Bedliners	+1.8%	+3.2%	3.5	3.6	28.9	32.6
6. Brake Products	+5.0%	+6.4%	12.0	5.6	35.2	35.8
7. Car Wash Products	+3.5%	+2.2%	4.0	4.3	37.5	34.4
8. DIY Books	+5.2%	+3.9%	3.4	3.5	37.2	42.3
9. Filters (Air, Fuel, Oil)	+6.9%	+4.7%	12.0	5.6	30.8	33.0
10. Floor Mats	+4.4%	+0.4%	3.3	3.7	32.3	39.8
11. Hand Cleaners	+1.0%	+2.7%	6.3	4.8	31.8	38.2
12. Hand Tools	+2.8%	+1.5%	5.9	3.3	27.8	37.4
13. Headlamps	+5.0%	+5.0%	8.7	5.0	29.6	34.4
14. Lift Supports	+4.1%	+3.7%	2.9	3.0	35.9	40.5
15. Mechanical Security	+3.5%	NA	1.4	NA	14.6	NA
16. Motor Oils	+3.6%	+3.0%	15.2	9.2	21.2	17.2
17. Performance/Service Chemicals	+5.8%	+5.2%	5.0	5.7	33.3	38.5
18. Roof Racks	+8.2%	NA	3.1	NA	31.9	NA
19. Running Boards	-1.7%	+2.4%	9.5	3.5	28.7	32.8
20. Shocks & Struts	+2.6%	+1.1%	7.3	4.0	28.9	32.6
21. Spark Plugs	+3.1%	+7.0%	9.6	4.4	31.3	37.9
22. Surface Treatments/Protectants	+3.5%	+4.6%	5.8	3.8	33.1	35.1
23. Tire Care	+2.3%	+6.0%	3.9	3.7	32.0	37.2
24. Tire Inflators	+1.9%	+3.0%	3.3	4.5	34.3	41.3
25. Touch Up Paint	-1.5%	+3.5%	9.3	3.7	32.3	42.1
26. Waxes & Polishes	+1.4%	+4.2%	5.1	4.8	30.7	36.1
27. Wiper Blades	+5.2%	+5.4%	7.8	6.2	28.3	39.0

Average Annual Turns x Average Gross Margin

Source: Aftermarket Business 4/1/92 Car Care Center Study

	Avg. Annual Turns x Avg. Gross Margin		
	1991	1990	1989
1. Brake Products	4.224	2.005	2.272
2. Filters (Air, Fuel, Oil)	3.696	1.848	2.020
3. Motor Oils	3.224	1.582	1.566
4. Spark Plugs	3.005	1.668	1.839
5. Touch Up Paint	3.004	1.558	1.792
6. Running Boards	2.727	1.148	1.344
7. Headlamps	2.575	1.720	1.646
8. Antifreeze/Coolants	2.550	1.102	1.409
9. Additives (Chemicals)	2.520	2.507	2.195
10. Wiper Blades	2.207	2.418	2.523
11. Shocks & Struts	2.110	1.304	1.562
12. Hand Cleaners	2.003	1.834	1.613
13. Surface Treatments/Protectants	1.920	1.334	1.703
14. Performance/Service Chemicals	1.665	2.195	2.400
15. Hand Tools	1.640	1.234	1.209
16. Waxes & Polishes	1.566	1.733	1.749
17. Batteries	1.523	1.531	1.579
18. Car Wash Products	1.376	1.613	NA
19. All Purpose Cleaners	1.362	1.538	NA
20. DIY Books	1.265	1.481	1.397
21. Tire Care	1.248	1.376	NA
22. Tire Inflators	1.132	1.859	1.295
23. Floor Mats	1.066	1.473	1.428
24. Lift Supports	1.041	1.215	1.470
25. Bedliners	1.012	1.174	1.034
26. Roof Racks	0.989	NA	NA
27. Mechanical Security	0.204	NA	NA

Product Categories: Contents

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Jobber Sales: Rebuilt vs. New (Source: Motor & Equipment Manufacturers Association)

<u>Parts Category</u>	1991	
	<u>% New</u>	<u>% Rebuilt</u>
Air Conditioning	41.4%	58.6%
Alternators	12.4	87.6
Brake Shoes	15.3	84.7
Calipers	6.5	93.5
Carburetors	15.8	84.2
Clutch	15.9	84.1
Crank Shafts	7.0	93.0
CV Joints/Drive Axle	49.9	50.1
Cylinder Heads	9.6	90.4
Engine Blocks	5.8	94.2
Fuel Pumps	87.8	12.2
Master Cylinders	33.2	66.8
On-Board Computers	22.6	77.4
Power Steering Pumps	6.7	93.3
Rack & Pinion	5.9	94.1
Starters	8.5	91.5
Water Pumps	26.7	73.3
Wiper Motors	9.2	90.8

- Industry term for rebuilt or remanufactured parts in "Reman".
- 17 of the above 18 categories surveyed had rebuilt units higher than new units.

Import Car Parts

- 1990 - 1995 Import vehicle parts & accessories sales expected to grow 55%. (Lang Mktg. Resources)
- Import Maintainers
 1. Dealerships
 2. Auto Parts Stores

Categories Carried by Dealerships & Auto Parts Stores

	<u>Dealerships</u>	<u>Auto Parts Stores</u>	<u>Total</u>
1. Repair Manuals	64%	12%	76%
2. Tune-Up Parts	44	24	68%
3. Shocks & Struts	40	19	59%
4. Cooling System Parts	39	23	62%
5. Floor Mats	36	32	68%
6. Windshield Wipers	33	35	68%
7. Engine System Parts	33	14	47%
8. Brake System Parts	32	16	48%
9. Upholstery Care Products	30	36	66%
10. Filters	29	17	46%
11. Front End Parts	29	44	73%
12. Body Repair Products	28	27	55%
13. Motor Oil	26	23	49%
14. Lighting System Parts	24	47	71%
15. Fuel System Parts	22	22	44%
16. Starting/Charging System Parts	21	24	45%
17. Exhaust System Parts	21	5	26%
18. Antifreeze	19	20	39%
19. Protectants/Vinyl Cleaners	18	21	39%
20. Electronic Accessories	13	13	26%
21. Wax/Polish	11	19	30%
22. Batteries	10	21	31%
23. Gas Additives	8	46	54%
24. Custom Wheels/Accessories	7	39	46%
25. Cleaning Products	3	31	34%
26. Seat Covers	0	60	60%

Product Categories Stocked by Retailers

Source: Automotive Marketing - September, 1992

	<u>Small Retailers (<5M SKUs)</u>	<u>Medium (5-15M SKUs)</u>	<u>Large (>15M SKUs)</u>
Air/Oil Filters	82%	92%	88%
Antifreeze	91	89	94
Batteries	77	89	82
Battery Chargers	57	76	69
Body Repair	56	76	65
Car Washers	59	76	69
Engine Treatment	74	78	78
Floor Mats	43	76	54
Motor Oil	88	89	94
Oil/Gas Additives	79	87	81
Protectants	78	81	76
Seat Covers	28	57	40
Security	33	57	38
Spark Plugs	74	92	87
Tire Care	60	78	72
Tire Inflators	60	84	71
Tune-Up	68	87	79
Upholstery Chemicals	58	81	73
Waxes	76	87	81
Wipers	78	92	84

Small Parts

Rebuilt Survey

- Vast majority of small parts, cylinder heads & engine block sales are rebuilt.
- Jobbers still account for most rebuilt part purchases.
- Parts proliferation and new models are frequent reasons why new new parts do better than rebuilt parts in certain categories.
- Rebuilt parts: quality replacements at significant savings vs. new parts
- Jobbers are most concerned about the quality of the part.

- Highest priorities:
1. Product quality
 2. Order fill
 3. Warranty
 4. Price
 5. Credit Policy

- Sales of rebuilt parts to Wholesalers/Retail: 60%/40%
- Jobbers are buying more frequently direct from rebuilders (38% of all jobbers).
- Majority of jobbers have remained w/current source of rebuilt parts for longer than 3 years.
- 47% of all jobbers would like to see rebuilds with longer warranties (an advantage of new parts).
- Most frequent reasons for sourcing rebuilds from independents:

1. Price 76%
2. Availability 57%
3. Quality 25%
4. Warranty 23%
5. Service 23%

- Reasons cited for sourcing OEM Reman units:

1. Quality 38%
2. Warranty 16%
3. Availability 10%
4. Service 7%
5. Price 1%

- How to sell (preferred selling technique) rebuilds, from Jobbers' viewpoint:

1. Personal Sales Call 79.2%
2. Seminars & Product Demonstrations 78%
3. Trade magazine advertising 41%
4. Direct mail 36%
5. Consumer advertising 29%
6. Telemarketing 13%

- Most jobbers said rebuilt sales would increase if customers were better educated about rebuilds (how they're cleaned, disassembled, tested, rebuilt, tested again).

Antifreeze/Coolant

- Distribution
 - Discount Chains 58%
 - Auto Chains 20%
 - Non-Auto chains 18%
 - Dept. Store Chains 2%
 - New Car Dealers 2%

- 1991 +0.6% ('90 - +1.5%) 1992E: +5.9%

- Total Aftermarket Sales \$1.9 Billion (Retail Chains did: \$1.4B)

- Avg. Annual Turns: 10.2 ('90 - 5.4, '89 - 7.3)

- Avg. Gross Margin (retailers): 25.0% ('90 - 20.4%, '89 - 19.3%)

- One of the more popular DIY projects (74% DIY mix)

- Avg. Annual Turns x Avg. Gross Margin:	1991	2.550
	1990	1.102
	1989	1.409

Batteries

- Distribution
 - Discount Chains 15%
 - Auto Chains 27%
 - Dept. Store Chains 50%
 - New Car Dealers 2%
 - Other Retailers 6%

- 1991 +2.8% ('90 - +7.7%) 1992E: +6.9%
- Total Aftermarket Sales \$7.2B (Retail Chain sales: \$2.7B)
- Avg. of 1.2 Nat'l Brands stocked (Displays take a lot of space)
- Avg. Gross Margin: 22.4% ('90 - 26.4%, '89 - 28.7%)
- Avg. Annual Turns: 6.8 ('90 - 5.8, '89 - 5.5)

- DIYers
 - Professionals 84%
 - Experienced 78%
 - Beginners 48%
- Avg. life span has increased to almost 5 yrs.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.523
	1990	1.531
	1989	1.579

Top Ten Battery Products

	<u>% Space</u>	<u>Profit</u>	<u>Turns</u>
1.	Car Batteries	Battery Cables	Car Batteries
2.	Battery Chargers	Battery Cable	Lawn & Garden Batteries
3.	Booster Cables	Ends/Adapters	Motorcycle Batteries
4.	Battery Cables	Anti-Corrosion Washers	Battery Test Equipment
5.	Truck Batteries	Battery Hold Downs	Truck Batteries
6.	Motorcycle Batteries	Car Batteries	Acid Packs
7.	Lawn & Garden Batteries	Booster Cables	Battery Cable
8.	Battery Test Equipment	Battery Chargers	Ends/Adapters
9.	Other	Motorcycle Batteries	Booster Cables
10.	Battery Cable	Battery Test Equipment	Battery Hold Downs
11.	Ends/Adapters	Battery Trays	Anti-Corrosion Washers

Source: MarketWare Corporation April 1992 survey to 50 automotive retailers and jobbers

Batteries

- Core product for retailers
- Classified as a "Hard Part"
- Proliferated as a result of new engine designs
- Most retailers carry 1 brand & 20 types.
- Special displays are needed at Point of Sale.
- Battery Accessories merchandised next to Batteries
- Avg. turn: 5.2 (Batteries) 3.1 (accessories)
- Consumers usually replace OEM product w/identical product.
- Advertising & pricing are critical to increased sales.
- Battery disposal a growing issue (Most states require retailers to buy back used batteries.)
- Consumer: Male
- Easy DIY product
- Low impulse product: replaced when fail
- Companies, like Ameritron, are trying to gain distribution, by offering product to retailers on consignment.
- Battery category: requires a lot of space at P.O.S.
- Not a Mass Merchant category
- One of the most promoted of Auto Product categories
- A frequently Private Label business for larger retailers
- Chain retailers project Batteries to grow 8-10% in 1993.
- Wholesale/Retail sales mix: 35% wholesale/65% retail
- Chains: 6-10% total sales come from Batteries (an important category)
- Battery Gross Margins (for Chain Retailers): 28-32%
- Small chains usually carry 1 Brand & 10 SKUs; larger chains will carry 1-2 brands & 30 SKUs.
- Batteries are promoted 3-4 times a year.
- Over 80% of all chains stock Batteries.

Bedliners

- Distribution
 - Discount Chains 8%
 - Auto Chains 67%
 - Dept. Store Chains 18%
 - New Car Dealers 5%
 - Other Retailers 2%

- 1991 (4.4%) ('90 - +3.2%) 1992E: +6.4%
- Total Aftermarket Sales \$97M (Retail Chains: \$58M)
- Avg. Gross Margin: 28.9% ('90 - 32.6%, '89 - 30.4%)
- Avg. Annual Turns: 3.5 ('90 - 3.6, '89 - 3.4)
- DIY participation level: 19% (poll includes Car Owners)

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.012
	1990	1.174
	1989	1.034

Brake Products

- Distribution
 - Discount Chains 6%
 - Auto Chains 62%
 - Dept. Store Chains 24%
 - New Car Dealers 5%
 - Other Retailers 3%

- Vital part of Retailers' Hard Parts product offering
- Anti-lock brake systems: not yet a part of the aftermarket
- Drum & Disc systems only
- 1991 +5.0% ('90 - +6.4%) 1992E: +6.6%
- Total Aftermarket Sales \$2.9B (Retail Chains: \$647M)
- Avg. Gross Margin: 35.2% ('90 - 35.8%, '89 - 41.3%)
- Avg. Annual Turns: 12.0 ('90 - 5.6, '89 - 5.5)
- Carry an average of 1.9 National Brands
- DIY job is considered to be for the more experienced.

- Avg. GM x Avg. Turns:

1991	4.224
1990	2.005
1989	2.272

Chemicals (Additives)

- Distribution
 - Discounters 70%
 - Auto Chains 18%
 - Dept. store chains 3%
 - New Car Dealers 2%
 - Others 7%

- 1991: +3.7% (sales \$) 1992E: +6.6%
- Total Aftermarket Sales \$1.65B (Retail Chains did 76.9% = \$1.27B)
- Avg. Annual Turns: 7.2 ('90 - 6.1, '89 - 5.7, '88 - 4.7)
- Avg. Gross Margin (retailers): 35.0% ('90 - 41.1%, '89 - 38.5%, '88 - 39.5%)
- # of National Brands carried (avg.) - 7.2

A. Oil Additives

- Past positioning: correcting Engine problems
- New positioning: preventing Engine problems

- Avg. Annual Turns x Avg. Gross Margin:	1991	2.520
	1990	2.507
	1989	2.195

Chemicals (Engine Treatment) (Source: Automotive Marketing, September 1992)

- 76% of all retail outlets stock these products.
- Category is projected to grow over 10% in 1993.
- Wholesale/Retail mix: 23/77
- Chains: 2% of total sales come from this category.
- Mean Gross Margin for chains: 33-37%
- Chains usually stock 3-4 brands and 3-5 total SKUs.
- Category is promoted 1-2 times a year.
- In general, it is not a Private Label category.

- Consumers do not really understand the category.
 - They do not know that most engine wear occurs at start-up and that engine treatment products reduce friction. Consumer awareness needed - sizeable opportunity for a firm willing to advertise, explain and persuade.

Chemicals (Performance/Service) (Fuel Injector, Carburetor, Choke Cleaners)

- Distribution
 - Discount Chains 65%
 - Auto Chains 25%
 - Dept. Store Chains 2%
 - Other Retailers 8%

- Total Aftermarket Sales \$36.4M (Retail Channel sales: \$29.1M, 79.9%)

- 1991 +5.8% 1992E: +6.6%

- Avg. Gross Margin: 33.3% ('90 - 38.5%, '91 - 40.0%)

- Avg. Annual Turns: 5.0 ('90 - 5.7, '89 - 6.0)

- Many consumers have no idea what they're putting into their engines.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.665
	1990	2.195
	1989	2.400

Chemicals (Surface Treatments/Protectants)

- Distribution:	• Discount Chains	60%
	• Auto Chains	23%
	• Dept. Store Chains	4%
	• Other Retailers	13%

- Total Aftermarket Sales \$267M (Retail Chains: \$210M, 78.6%)

- 1991: +3.5% 1992E: +6.3%

- Avg. Gross Margin: 33.1% ('90 - 35.1%, '89 - 39.6%)

- Avg. Annual Turns: 5.8 ('90 - 3.8, '89 - 4.3)

- Surface Treatment & Protectant products protect vinyl, leather, & rubber surfaces from damaging sunlight.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.920
	1990	1.334
	1989	1.703

Chemicals (Upholstery & Protectants) (Source: Automotive Marketing, September 1992)

- Growth projections for '92: 5%
- Wholesale/Retail mix: 20/80
- Mean Gross Margin: 32-34%
- 4-5 brands carried, 4-8 SKUs stocked
- Promoted 1-2 times per year
- 5-6% of chains surveyed carry Private Label product.
- 80% of all retailers stock the category.
- 68% of all outlets carry the category.
- 3 Brands carried, 3-6 SKUs stocked
- Not a Private Label business

Cleaners (All-Purpose) (excl. Protectants & Tire Cleaners)

- Distribution
 - Discounters 48%
 - Auto Chains 28%
 - Dept. chains 2%
 - Others 22% (Food, Drug, Hardware, Home Centers, Convenience Stores)

- Total Aftermarket Sales \$31.6M (Retail Chains did: \$20.5M)
- Avg. Annual Turns: 5.7 ('90 - 4.1)
- Avg. Gross Margin (retailers): 23.9% ('90 - 37.5%)
- High number of National Brands carried (consumables)
- Applicable to Auto & Home use, a difficult category to summarize.
- 1992E: +6.7% 1991: +1.9%

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.362
	1990	1.538

Cleaners (Appearance Chemicals)

- \$655 million retail sales market

1. Protectants	\$255 million
2. Wax/Polish	\$190 million
3. Others	\$195M (e.g. Tire Cleaners)

- Major competitors in Protectants:

1. Armor-All (80% SOM of Protectants)	\$4-5 million in advertising in '92
2. First Brands (STP Son of a Gun)	
3. Turtle Wax	

- Major competitors in Wax/Polish

1. Turtle Wax (40% SOM)	80-85% of the market
2. Reed Union (Nu Finish)	
3. Armor-All (Rain Dance)	
4. First Brands (Simonize)	

- Very competitive category, a lot of players, brand name/advertising is important, P.O.S./packaging is critical.

Cleaners (Car Wash Products)

- Distribution
 - Discounters 65%
 - Auto Chains 22
 - Dept. Store Chains 2
 - Other Retailers 11

- Families are keeping cars longer.
- 1991: +3.5% ('90 + 2.2%) 1992E: +7.4%
- Total Aftermarket Sales \$45M̄ (Retail Chain Sales: \$41M̄)
- Many HH products are used to wash cars.
- Avg. Gross Margin: 34.4% ('90 - 37.5%)
- Avg. Annual Turns: 4.0 ('90 - 4.3)
- Number of brands carried 2.8
- This category is an impulse nature item.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.376
	1990	1.613

Cleaners (Hand)

- Distribution
 - Discount Chains 39%
 - Auto Chains 50%
 - Dept. Store Chains 9%
 - Other Retailers 2%

- 1991: +1.0% 1992E: +3.0%

- Total Aftermarket Sales: \$42.6M (Retail Chains: \$18.0M, 42.2%)

- Avg. Gross Margin: 31.8% ('90 - 38.2%, '89 - 37.5%)

- Avg. Annual Turns: 6.3 ('90 - 4.8, '89 - 4.3)

- Hand Cleaner opportunity:

- Positioning to do more than just Oil/Grease clean-up (such as Home Repairs, Gardening)
- Cross-merchandising in Lawn & Garden & Plumbing areas

- Avg. Annual Turns x Avg. Gross Margin:	1991	2.003
	1990	1.834
	1989	1.613

Clutch Market (Source: Import Auto Parts & Accessories, August 1992)

- 40 million import cars on the road today
 - 75% have manual transmissions (50 million candidates for clutch work).
- Highly competitive market
- Most jobbers prefer new clutches priced low (low margins), vs. rebuilds.
(e.g. Korean new clutches close in price to rebuilds)
- Clutch jobs involve Cover, Disc & Release Bearing.

Issue: Individual Parts or Kits?

Main Issue w/kits is the inventory duplication & higher price.

Too many customers mix and match components, so the trend has been away from kits.

The advantage of kits: always have all components in stock, increase the size of the sale, ensures jobs are done properly.

Mix & match results in manufacturers not warranting the parts.

DIY Books

- Distribution
 - Discounters 19%
 - Auto Chains 58
 - Dept. Chains 20
 - New Car Dealers 2
 - Other Retailers 1

- Total Aftermarket Sales \$60.8M (Retail Chain Sales: \$52.3M)

- 1991: +5.2% 1992E: +6.9%

- Avg. Gross Margin (retailers): 37.2% ('90 - 42.3%, '89 - 41.1%)

- Annual Turns: 3.4 ('90 - 3.5, '89 - 3.4)

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.265
	1990	1.481
	1989	1.397

Exhaust Systems (Source: Aftermarket Today - May/June, 1992)

- 6th most important category for Replacement Sales
- \$2.2 Billion at retail, 50-52 million units sold per year
- Category has been declining since 1980.
 1. Material changes in Original Equipment exhaust systems (e.g. increased use of stainless steel)
 2. Fewer components in the system
 3. More welded assembly products for the replacement market
- Muffler shops are the principal installers.
- 3 channels & their requirements
 1. Traditional: Brand vs. Private Label
 2. Muffler shop: Franchisee vs. Independent shop requirements
 3. Retail store: Wet vs. Dry
- Exhaust systems have become more cosmetic due to their increased visibility.
 - No longer a "fit & function" business

Filters (Air, Fuel, Oil)

- Distribution
 - Discount Chains 55%
 - Auto Chains 32%
 - Dept. Store Chains 4%
 - New Car Dealers 5%
 - Other Retailers 2%

- 1991: +6.9% 1992E: +6.4%

- Total Aftermarket Sales: \$2.1B (Retail Chains: \$767M, 36.5%)

- More preventative maintenance, so aftermarket sales are strong

- Avg. Annual Turns: 12.0 ('90 - 5.6, '89 - 5.4)

- Avg. Gross Margin: 30.8% ('90 - 33.0%, '89 - 37.4%)

- 85% DIY installation rate (#2 DIY process behind changing the oil)

- Application charts at P.O.S. make it a self-serve, error-minimization process

- Avg. Annual Turns x Avg. Gross Margin:	1991	3.696
	1990	1.848
	1989	2.020

Filters (Oil & Air) (Source: Automotive Marketing, September 1992)

- 85% of all outlets stock filters.
- 10% growth in '92/'93 projected
- 10% of total sales come from this category.
- Parts proliferation problem exists.
- Outlets stocking: Small: 2 brands, 32 SKUs (requires 50 sq. ft. of space)
 - Medium: 2 brands, 200 SKUs
 - Large: 3 brands, 250 SKUs (requires almost 270 sq. ft. of space)
- Wholesale/Retail mix: 40/60
- Mean Gross Margin: 33-36%
- Category promoted 3 times a year
- 15-20% of all chains stock private label product.

Floor Mats

- Distribution
 - Discount Chains 61%
 - Auto Chains 22%
 - Dept. Store Chains 10%
 - New Car Dealers 5% (aftermarket only)
 - Other Retailers 2%

- 1991: +4.4% 1992E: +6.3%

- Total Aftermarket Sales: \$215M (Retail Chains: \$160M, 74.4%)

- Most sales occur in Showrooms tied to new car sales.

- Avg. Gross Margin: 32.3% ('90 - 39.8%, '89 - 35.7%)

- Opportunity: Displays that minimize space, allow consumers an easy to find and review process
Current displays: hanging Racks in Gondolas

- Avg. Annual Turns: 3.3 ('90 - 3.7, '89 - 4.0)

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.066
	1990	1.473
	1989	1.428

Fuel Injection Parts

- \$300 million market (1991), study conducted by Marketing Research Services (MRS) in Seaford, NY.

- Not an Aftermarket category. Bulk of sales/work done by new car dealers (65%).

- | | |
|---------------------------|-----|
| 1. New Car Dealers | 65% |
| 2. General Repair Shops | 16% |
| 3. Service Stations | 10% |
| 4. Specialty Repair Shops | 7% |

Hand Tools

- Distribution: • Discount Chains 47%
- Auto Chains 10%
- Dept. Store Chains 14%
- Other Retailers 29%

- Total Aftermarket Sales $\overline{\$852M}$ (Retail Chains: $\overline{\$511M}$, 60%)

- 1991: +2.8% 1992E: +4.2%

- Avg. Gross Margin: 27.8% ('90 - 37.4%, '89 - 39.0%)

- Avg. Annual Turns: 5.9 ('90 - 3.3, '89 - 3.1)

- Vehicles are becoming more complicated, which means Specialty Tools have a future.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.640
	1990	1.234
	1989	1.209

Headlamps

- Distribution	• Discount Chains	20%
	• Auto Chains	58%
	• Dept. Store Chains	14%
	• New Car Dealers	2%
	• Other Retailers	6%

- 1991: +5.0% 1992E: +6.2%

- Total Aftermarket Sales: \$247M (Retail Chains: \$142M, 57.4%)

- Avg. Gross Margin: 29.6% ('90 - 34.4%, '89 - 37.4%)

- Avg. Annual Turns: 8.7 ('90 - 5.0, '89 - 4.4)

- Parts proliferation challenge in this category

- Retailers tend to carry only 1-2 brands.

- Avg. Annual Turns x Avg. Gross Margin:	1991	2.575
	1990	1.720
	1989	1.646

Lift Supports

- Distribution	• Discount Chains	24%
	• Auto Chains	65%
	• Dept. Store Chains	8%
	• Other Retailers	3%

- 1991: +4.1% 1992E: +7.2%

- Total Aftermarket Sales: \$64.8M (Retail Chains: \$43.9M, 67.6%)

- Avg. Gross Margin: 35.9% ('90 - 40.5%, '89 - 42.0%)

- Avg. Annual Turns: 2.9 ('90 - 3.0, '89 - 3.5)

- Retailers carry an average of 0.4 brands.

- Manufacturers have not educated consumers about this category.

- Requires retailers/manufacturers to display and educate this category.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.041
	1990	1.215
	1989	1.470

Lubricants (Source: Automotive Marketing, September 1992)

- 80% of all retail outlets stock lubricants.
 - Promoted 5 times a year
 - 4-5 brands carried, 5-15 SKUs stocked
 - Sales growth is projected to be 7-10% in 1992.
 - Wholesale/Retail mix: 26/74
 - 2-3% of total sales for chains come from this category.
 - Mean Gross Margin of 32-37%
-
- Point-of-Sale displays and promotions will help accelerate sales.

Motor Oil

- Distribution
 - Discount Chains 62%
 - Auto Chains 18%
 - Dept. Store Chains 1%
 - New Car Dealers 5%
 - Other Retailers 14%

- Total Aftermarket Sales \$3.2B (Retail Chain sales: \$2.3B, 68.7%)

- 1991 +3.6% 1992E: +6.0%

- Avg. Gross Margin: 21.2% ('90 - 17.2%, '89 - 18.0%)

- Avg. Annual Turns: 15.2 ('90 - 9.2, '89 - 8.7)

- Retailers carry an average of 4.4 Brands.

- 86% of all DIYers change their own oil.

- Avg. Annual Turns x Avg. Gross Margin:	1991	3.224
	1990	1.582
	1989	1.566

- The single most important commodity sold by retailers
- Carried by 91% of all retailers surveyed
- 7% of all Auto product sales are in this category.
- Avg. of 6 brands carried, stocking 10-20 SKUs
- Large chains will allocate over 1,000 sq. ft. to the category
- Wholesale/Retail mix: 29/71
- Often used as a loss leader to bring consumers to the stores
- Average Gross Margin: 20% (Very low! Very competitive category!)
- Growth projected at 6-7% in '92

Source: Automotive Marketing, September 1992)

Steering & Suspension (Source: Automotive Marketing, May 1992)

- Lower turning category, but usually higher margins
- 16th most purchased category
- Declining in size category
- Rack & Pinion steering has impacted steering & suspension parts sales.
- Products in this category include:
 1. Shock Absorbers
 2. Steering Wheels
 3. Wheel Covers
 4. Shock Springs
 5. Load Control
 6. Rear Shock Springs
 7. Load Lifters
 8. Coil Helpers
 9. Spring Controls
 10. Steering Wheel Installation Kits
 11. Horn Buttons
- Gas shocks are the future (no longer hydraulic shocks).
- Struts are a popular substitute for shock absorbers (yet, harder to install).
- Most segments are Brand Name only items, low turns (no incentive for Private Label).
- Light Truck steering and suspension parts sales are beginning to increase.
- Usually located near wheels & tires.
- Low impulse buy. An experienced, DIY purchase, in general.
- Seasonal category (Warmer weather months)
- Planograms are critical to maximizing sales here.

Top Ten Steering and Suspension Products

	<u>% Space</u>	<u>Profit</u>	<u>Turns</u>
1.	Shock Absorbers	Horn Buttons	Twist Spring Boosters
2.	Steering Wheels	Spring Control	Rubber Coil Boosters
3.	Steering Wheel Covers	Steering Wheel Covers	Steering Wheel Covers
4.	Shock Springs	Twist Spring Boosters	Steering Wheel Pullers
5.	Load Control	Shock Extenders	Horn Buttons
6.	Rear Shock Springs	Steering Wheel Pullers	Shock Absorbers
7.	Load Lifters	Shock Bushings	Coil Helpers
8.	Coil Helpers	Rubber Coil Boosters	Spring Controls
9.	Spring Controls	Steering Wheels	Load Control
10.	Steering Wheel Installation Kits	Load Lifters	Steering Wheel Installation Kits

Based upon February 1992 survey of retailers and jobbers conducted by MarketWare Corp.

Shocks & Struts

- Distribution
 - Discount Chains 15%
 - Auto Chains 50%
 - Dept. Store Chains 29%
 - New Car Dealers 5%
 - Other Retailers 1%

- Total Aftermarket Sales \$1.5B (Retail Chain sales: \$697M, 46.5%)

- 1991 +2.6% 1992E: +6.3%

- Avg. Gross Margin: 28.9% ('90 - 32.6%, '89 - 34.7%)

- Avg. Annual Turns: 7.3 ('90 - 4.0, '89 - 4.5)

- With average age of vehicles on the road (>7 yrs.), sales should grow.

- Strut replacement is a difficult DIY product, requiring special tools & safety precautions.

- Avg. Annual Turns x Avg. Gross Margin:	1991	2.110
	1990	1.304
	1989	1.562

- Trucks account for 45% of all aftermarket ride control sales.

- 1/3 of all Shock Absorber sales (up from 20% in 1980)

- Change to Front Wheel drive has eliminated shocks from most new car suspensions, being replaced by struts.

- Projected that by 1994, 64% of all vehicles on the road will have strut suspensions, up from 50% today.

- Struts last twice as long as shocks.

- Struts are a difficult DIY project, usually installed professionally. Usually wheels have to be realigned.

Touch Up Paint

- Distribution:
 - Discount Chains 7%
 - Auto Chains 21%
 - Dept. Store Chains 54%
 - Other Retailers 18%

- Total Aftermarket Sales \$254M (Retail Chains: \$164.5M, 64.6%)

- 1991: -1.5% 1992E: +3.0%

- Avg. Gross Margin: 32.3% ('90 - 42.1%, '89 - 44.8%)

- Avg. Annual Turns: 9.3 ('90 - 3.7, '89 - 4.0)

- Avg. Annual Turns x Avg. Gross Margin:	1991	3.004
	1990	1.558
	1989	1.792

Roof Racks

- 1991: +8.2% 1992E: +8.8%

- Total Aftermarket Sales: \$35.5M (excludes Sports Stores' sales)

- Sub categories:	A. Cross Bars	\$ 4.5M
	B. Sport Modules (ski & bike racks)	\$15.0M
	C. Hood Tops/Car Top Carriers	\$16.0M (90% sold through Discounters)

- Avg. Gross Margin: 31.9%

- Avg. Annual Turns: 3.1

- Max. of 1 brand carried by Retailers

- Avg. Annual Turns x Avg. Gross Margin: 1991 0.989

Running Boards

- Distribution	• Discounters	13%
	• Auto Chains	72%
	• Dept. Store Chains	12%
	• New Car Dealers	2%
	• Other Retailers	1%

- 1991: (-1.7%) 1992E: +3.8%

- Total Aftermarket Sales: \$94M (Retail Chains: \$60.8M, 64.7%)

- Avg. Annual Turns: 9.5 ('90 - 3.5, '89 - 4.0)

- Avg. Gross Margin: 28.7% ('90 - 32.8%, '89 - 33.6%)

- Avg. Annual Turns x Avg. Gross Margin:	1991	2.727
	1990	1.148
	1989	1.344

Security Products (Mechanical)

- Total Aftermarket Sales \$135M̄ (Retail Chain sales: \$121.5M̄, 90%)
- 1991 +3.5% 1992E: +3.0%
- Avg. Gross Margin: 14.6%
- Avg. Annual Turns: 1.4
- The category includes:
 - Steering Wheel Locking Devices
 - Wheel & Lug Lock
- Category is more for city retailers than suburban or rural retailers.
- Avg. Annual Turns x Avg. Gross Margin: 1991 0.204

- Only 38% of all retailers surveyed stock the category.
- 2 brands, 2-4 SKUs carried
- Generally carry 2 Steering Wheel blockers & 1-3 electric motion detector systems
- Growth estimated 20-25% in '92
- Wholesale/Retail mix: 10/90
- Mean Gross Margin: 31-34%
- Not a Private Label category
- Promoted 1-2 times a year

Spark Plugs

- Distribution: • Discount Chains 40%
- Auto Chains 41%
- Dept. Store Chains 12%
- New Car Dealers 5%
- Other Retailers 2%

- 1991: +3.1% 1992E: +5.9%

- Total Aftermarket Sales \$672M (Retail Chains: \$235M, 35%)

- Avg. Gross Margin: 31.3% ('90 - 37.9%, '89 - 41.8%)

- Avg. Annual Turns: 9.6 ('90 - 4.4, '89 - 4.4)

- Retailers carry an average of 3.0 brands in this category.

- With newer vehicles' electronic/computerized ignition systems and longer warranties (3 yrs. or 50M miles), expect consumers to turn more to professionals for replacement.

- While 79% of proclaimed DIYers change their own Spark Plugs, this category is projected to flatten out and decline in future years.

- Avg. Annual Turns x Avg. Gross Margin:	1991	3.005
	1990	1.668
	1989	1.839

- 82% of all retail outlets carry Spark Plugs (4th largest category carried).

- Growth ('92): 7-8%

- 5-7% of retailer sales come from this category.

- 24-29% Mean Gross Margin (low!)

- Wholesale/Retail mix: 40/60

- 3-4 brands carried, 40-170 SKUs stocked

- Category is promoted 2-3 times a year.

- Only 2-4% of retailers carry Private Label products.

- Champion covers 96% of the Import Car Market with only 13 SKUs.

Tire Care

- Distribution:
 - Discount Chains 55%
 - Auto Chains 34%
 - Dept. Store Chains 1%
 - Other Retailers 10%

- Total Aftermarket Sales \$27.9M (Retail Chains: \$23.5M, 84%)
- 1991: +2.3% 1992E: +6.2%
- Avg. Gross Margin: 32.0% ('90 - 37.2%)
- Avg. Annual Turns: 3.9 ('90 - 3.7)
- Tire care products are directly related to the tire industry.
- The category is primarily cosmetic, an impulse purchased item.

- Avg. Annual Turns x Avg. Gross Margin:

1991	1.248
1990	1.376

Tire Care Products (Source: Automotive Marketing, September 1992)

- New category
- 68% of all retailers carry the category.
- Growth ('92): 4-8%
- Wholesale/Retail Sales mix: 20/80 (Across the counter, DIY sales item)
- Promoted 1 time a year
- 3 brands carried, 4-6 SKUs stock
- Mean Gross Margin: 34-37%
- 2-4% of chains carry Private Label product.

Tires & Wheels (Source: Tire Review 1991/1992 Market Profile Study)

- Replacement tire market: 80 million tires
- 25M independent tire dealers in the U.S., accounting for 55% of all replacement tire sales
- Tire dealer Avg. Gross Margin: 54.6%
- Where Service Parts purchased:
 - 50.3% Jobbers
 - 32.7% WDs

<u>Type of Tire</u>	<u>% Tire Sales</u>
• Passenger	57.8%
• Light Truck	14.6
• High Performance (H, V, Z rated)	8.6
• Medium/Heavy Duty Truck	8.5
• Agricultural	2.5
• Retread Truck	2.4
• Industrial	2.1
• Retread Car/Light Truck	1.8
• Off-Road	1.2

Tire Dealers Type of Service (Based on 25M Tire Dealers input to survey)

1. Oil & Lube	23.3M jobs	11. Wheel Bearings & Seals	5.9
2. 2 Wheel Alignment	16.4 million	12. Cooling System Service	5.1
3. 4 Wheel Alignment	11.2	13. Idler/Pitman Arms	4.6
4. 2 Wheel Brake Job	9.2	14. Complete Struts	4.2
5. Shock Absorbers	8.5	15. Diagnostic Check	3.9
6. Air Conditioning Service	7.6	16. Strut Inserts	3.8
7. Tune-Up	6.8	17. Ball Joints	3.6
8. 4 Wheel Brake Job	6.3	18. Exhaust System Replacement	3.3
9. Belts & Hoses	6.2	19. Transmission Service	3.0
10. Tire Rod Ends	6.1	20. CV Joints	2.1

Tires & Wheels (Source: Specialty Automotive, 1992)

- Three types of wheels fitted:
 - A. Cast aluminum alloy (top of the line)
 - B. Stamped Steel
 - C. W/ or w/o hubcap (wheel cover)
- Custom wheel: one of the most noticeable and desirable accessories
- 2 main categories:
 - 1. Straight OEM replacement
 - 2. Custom upgrades
- Straight OEM:
 - A. Upgrades. Same appearance, but in aluminum vs. steel
 - B. Same. Snow tires or direct replacements
- Lighter wheels result in better handling.
- Total vehicle weight
 - A. Sprung areas - everything carried by the springs
 - B. Unsprung areas - everything resting directly on the ground
- The greater the sprung percentage, the better the ride and handling.
- Ways to reduce unsprung weight
 - 1. Decreasing the weight of wheels & tires
 - 2. Decreasing the differential

Tire Inflators

- Distribution:	• Discount Chains	62%
	• Auto Chains	13%
	• Dept. Store Chains	4%
	• Other Retailers	21%

- Total Aftermarket Sales \$55.6M (Retail Chains: \$47.3M, 85%)

- 1991: +1.9% 1992E: +6.3%

- Avg. Gross Margin: 34.3% ('90 - 41.3%, '89 - 38.1%)

- Avg. Annual Turns: 3.3 ('90 - 4.5, '89 - 3.4)

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.132
	1990	1.859
	1989	1.295

Tire Inflators (Source: Automotive Marketing, September 1992)

- 68% of all outlets stock the category (84% of Jobbers).
- Gross Margins (Retailers): 33-36%
- Growth ('92): 4-6%
- 2 brands carried, 3-4 SKUs stocked
- Wholesale/Retail Sales mix: 27/73
- 4-5% have Private Label products.
- Category is promoted 1-2 times a year.

Tune-Up Products (Source: Automotive Marketing - September, 1992)

- Products in this category: Wires, Points, (not Spark Plugs), Ignition Parts
- Growth: 8-10% in '92 projected
- In demand during flat economies when DIY activity increases
- Wholesale/Retail Sales mix: 45/55
- 7-10% of overall sales come from the category.
- Mean Gross Margin: 35-36%
- 2-3 Brands carried, 150-250 SKUs stocked
- Promoted 2-3 times a year
- 10% of all chains carry a Private Label.
- 80% of all outlets carry the category.

Waxes & Polishes

- Distribution:
 - Discount Chains 61%
 - Auto Chains 23%
 - Dept. Store Chains 2%
 - Other Retailers 14%

- Total Aftermarket Sales \$250M (Retail Chains: \$187M, 74.8%)

- 1991: +1.4% 1992E: +4.2%

- Avg. Gross Margin: 30.7% ('90 - 36.1%, '89 - 35.7%)

- Avg. Annual Turns: 5.1 ('90 - 4.8, '89 - 4.9)

- Retailers carry an average of 5.2 brands.

- Avg. Annual Turns x Avg. Gross Margin:	1991	1.566
	1990	1.733
	1989	1.749

Waxes & Polishes (Source: Automotive Marketing - September, 1992)

- 80% of all outlets carry the category.
- Very price competitive category (a lot of brands)
- Numerous segments:
 - High end: Carnauba
 - Spray-ons
 - Pastes
 - Colors
 - Easy to use waxes
- 2-3% of total sales come from this category.
- Avg. Gross Margins: 32-34%
- Heavily advertised category (small Private Label potential)
- Promoted 2-3 times per year
- 5-7 brands carried, 10-15 SKUs stocked
- Growth: 4-5% projected for '92
- Trend: colored waxes

Wiper Blades

- Distribution:
 - Discount Chains 51%
 - Auto Chains 33%
 - Dept. Store Chains 10%
 - New Car Dealers 2%
 - Other Retailers 4%

- Total Aftermarket Sales \$405M (Retail Chains: \$141M, 34.8%)
- Avg. Gross Margin: 28.3% ('90 - 39.0%, '89 - 40.7%)
- Avg. Annual Turns: 7.8 ('90 - 6.2, '89 - 6.2)
- 1991: +5.2% 1992E: +5.0%

- Avg. Annual Turns x Avg. Gross Margin:

1991	2.207
1990	2.418
1989	2.523

- Category has a lot of manufacturers and new product development activity.
- 84% of all outlets stock the category.
- Wholesale/Retail mix: 35/65
- Avg. of 2 brands carried, 40 SKUs stocked
- Category is promoted by Retailers 1-2 times per year.

- Installers of Wipers & Blades:

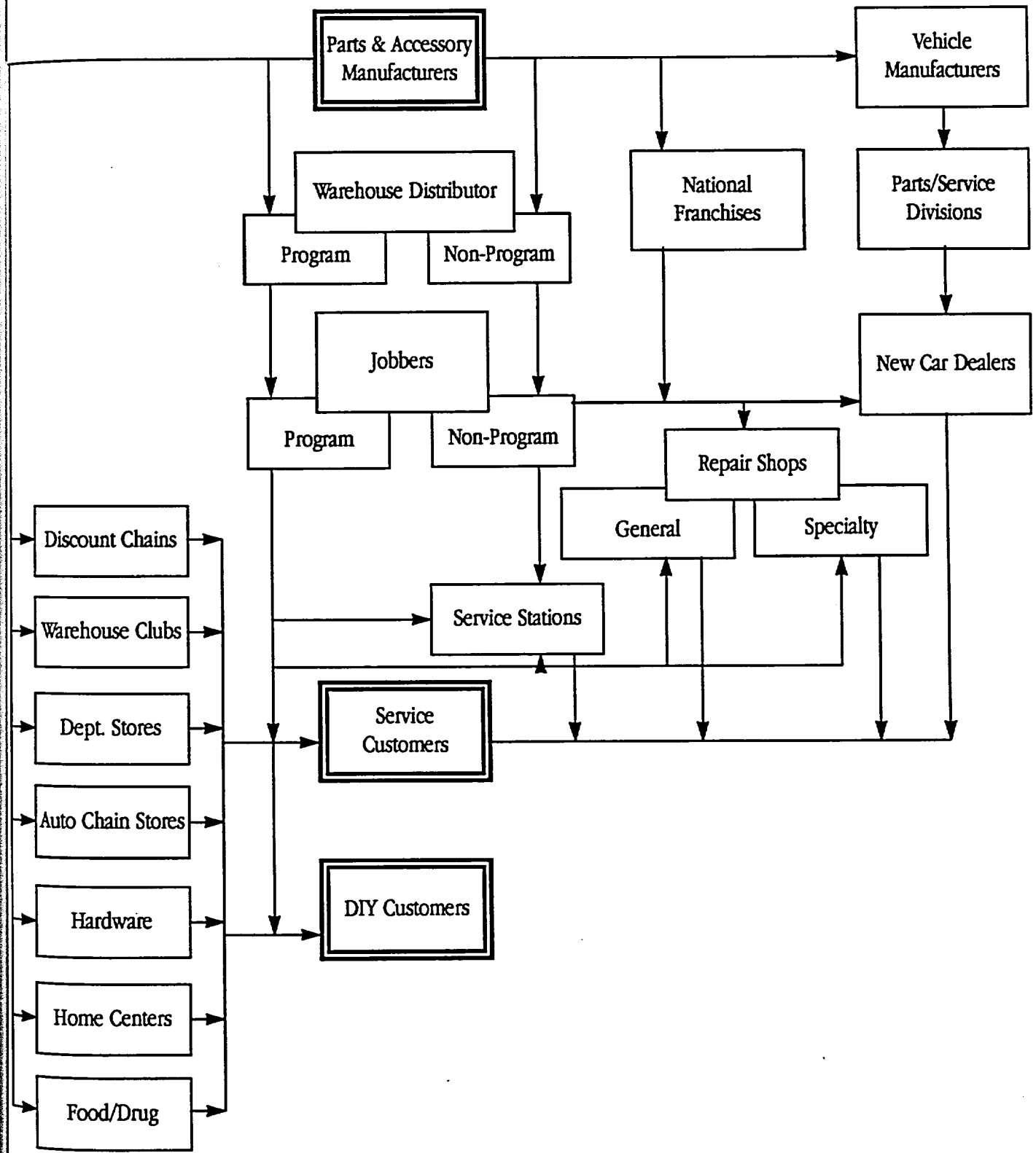
	<u>Non-DIYers</u>	<u>Light DIYers</u>	<u>Medium DIYers</u>	<u>Heavy DIYers</u>
1. DIYers	—	40%	76%	100%
2. Gas Station	30%	11%	9%	—
3. Car Dealership	14%	11%	2%	—
4. Auto Parts Store	14%	6%	2%	—
5. Specialty Installer	7%	12%	10%	—
6. Other	19%	13%	—	—

- Reasons why DIYers install their own wipers:
 - Simple to do/can do it
 - To save money
 - Need to get the job done
 - No time

General Distribution Structure: Contents

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Auto Aftermarket Distribution Structure



Distribution Channels

Establishments Selling Automotive Products at Retail

Type of Outlet	<u>1980</u>	<u>1990</u>	<u>1991E</u>
<u>Traditional Outlets</u>			
Auto Parts Stores	28,600	41,100	41,600
Jobbers	29,600	NA	NA
Tire Stores	<u>14,800</u>	<u>13,200</u>	<u>12,900</u>
Total	43,400	54,300	54,500
<u>Service Outlets</u>			
Service Stations	150,100	107,500	106,000
New Car/Truck Dealers	29,500	25,000	24,400
Specialty Repair	12,800	183,700	184,000
General Repair	<u>97,900</u>		
Total	290,300	316,200	314,400
<u>Mass Market Retailers</u>			
Department Stores	2,700	5,700	5,600
Discount Stores	6,900	8,400	8,300
Hardware Stores	17,800	22,400	22,100
Grocery Stores	83,600	102,100	101,300
Drug Stores	13,400	52,200	52,100
Variety Stores	<u>5,900</u>	<u>10,700</u>	<u>10,600</u>
Total	130,300	201,500	200,000
Other Outlets	56,600	1,122,670	1,124,030
Total Outlets	520,600	1,694,670	1,692,930

Source: APAA 1989 Retail Distribution of Automotive Products study; Audits & Surveys (1990 and 1991 data)

1991 Distribution Channels by Category

Source: Aftermarket Business 4/1/92 Car Care Center Study

	<u>Discounters</u>	<u>Auto Chains</u>	<u>Dept. Store Chains</u>	<u>New Car Dealers</u>	<u>Others</u>
1. Additives (Chemicals)	70%	18%	3%	2%	7%
2. All Purpose Cleaners	48	28	2	—	22
3. Antifreeze/Coolants	58	20	2	2	18
4. Batteries	15	27	50	2	6
5. Bedliners	8	67	18	5	2
6. Brake Products	6	62	24	5	3
7. Car Wash Products	65	22	2	—	11
8. DIY Books	19	58	20	2	1
9. Filters (Air, Fuel, Oil)	55	32	4	5	4
10. Floor Mats	61	22	10	5	2
11. Hand Cleaners	39	50	9	—	2
12. Hand Tools	47	10	14	—	29
13. Headlamps	20	58	14	2	6
14. Lift Supports	24	65	8	—	3
15. Motor Oils	62	18	1	5	14
16. Performance/Service Chemicals	65	25	2	—	8
17. Running Boards	13	72	12	2	1
18. Shocks & Struts	15	50	29	5	1
19. Spark Plugs	40	41	12	5	2
20. Surface Treatments/Protectants	60	23	4	—	13
21. Tire Care	55	34	1	—	10
22. Tire Inflators	62	13	4	—	21
23. Touch Up Paint	7	21	54	—	18
24. Waxes & Polishes	61	23	2	—	14
25. Wiper Blades	51	33	10	2	4

Service & Repair Establishments (Source: APAA)

	(Thousands)			<u>Comments</u>
	<u>1980</u>	<u>1990</u>	<u>1991</u>	
Service Stations	158.5	107.5	106.0	10 yr. decline of 33%
New Car Dealers	29.5	25.0	24.4	17% decline (10 yr.)
Specialty Repair/General Repair	141.2	183.7	184.0	30% increase
Other	94.9	53.0	54.7	42% decline
Total	424.1	369.2	369.1	

Specialty Service Repair Establishments - 1989 (Source: U.S. Dept. of Commerce)

	(Thousands)
Top, Body, Upholstery, Paint Repair	30.3
Exhaust System Repair	4.7
Tire Retread & Repair	1.6
Auto Glass Replacement	3.2
Transmission Repair	5.5
General Repair	54.4
Other	9.3

Factors Affecting Choice of Retail Outlet (Source: SEMA News)

1. Price	8.53 (on a scale of 1 to 10)
2. Selection	8.04
3. Trained Personnel	7.37
4. Warranty	7.32
5. Convenience	7.20

Auto Aftermarket Acquisitions

(Transactions over \$1 million)

1. Manufacturers	186 Deals
2. Wholesalers	51 Deals
3. Retailers	29 Deals

Leading Program Groups

1. NAPA	21% of all jobbers belong
2. Carquest	11%
3. Parts Plus	10%
4. Big A	6%
5. Auto Value	5%
6. Pronto	5%

Benefits in belonging to a Program Group (55% of all jobbers belong to a Program Group.)

1. Lower prices	47%
2. Advertising	41%
3. Obsolescence protection	24%
4. Group Name	19%
5. Daily Deliveries	15%
6. Return Policy	8%
7. Private Labels	7%
8. No Benefits	6%

WDS: 19% of their sales are retail.

Traditional Jobbers: 63% wholesale, 37% retail

Jobbers/Retailers: 53% wholesale, 47% retail

Retailers: 11% wholesale, 89% retail

Where Do Light Truck/Van/Utility Vehicle Owners buy Auto Products?

1. Discount Store	38%
2. Auto Parts Store	30%
3. Specialty Repair Shop	27%
4. Department Stores	22%
5. Car Dealership	20%
6. Gas Station	17%
7. Hardware Store	17%
8. Supermarket	16%
9. Convenience Store	13%
10. Drug Store	6%

Jobber Reported Sales Growth

1991 (vs. '90)	0.79%
1990 (vs. '89)	1.54%
1989 (vs. '88)	3.13%

Largest N.E. Aftermarket Chains

	<u># of Stores</u>	<u>Sales</u>	<u>Location</u>	<u>% DIY</u>	<u>U.S. Top 100 Ranking</u>
1. ADAP (Rite Aid) (Auto Palace)	89	\$85M	Avon, MA	99%	22
2. Benny's	29	\$16M	Esmond, RI	95%	44
3. Automotive Supply Assoc. Inc. (SAS Auto Parts Co.)	28	\$29M	Concord, NH	25%	47
4. Allied Auto Parts	23	\$14M	Brockton, MA	30%	62
5. Foreign Autopart Inc.	22	\$21M	Sharon, MA	30%	66
6. VIP Discount Auto Center	21	\$21M	Lewiston, ME	99%	67
7. Acme Auto Supply	21	\$20M	W. Hartford, CT	30%	68
8. Milford Auto Parts	17	\$17M	Woonsocket, RI	40%	82
9. Parts Wholesalers, Incl.	14	\$14.5M	Bangor, ME	30%	97
10. Hapco Auto Parts	14	\$10M	Holyoke, MA	25%	98
11. Darling's Auto Parts	14	\$10M	Bangor, ME	35%	99
12. Bond Auto Parts	14	\$8M	Barre, VT	35%	100

Jobber Reported Dollar Sales Performance (March '92 vs. February '92) (Source: Irving - Cloud Research)

	<u>Up</u>	<u>Unchanged</u>	<u>Down</u>
Total U.S.	52%	20%	28%
New England	54%	20%	28%
Mid-Atlantic	54%	18%	32%
East North Central	57%	19%	24%

Top 10 Auto Parts Retailers: 1991 (Source: Automotive Marketing)

<u>Retailer</u>	<u># Stores</u>	<u>Sales (\$ Millions)</u>
1. Northern Automotive	801	\$707.0
2. Genuine Parts	616	616.0
3. Auto Zone	570	670.0
4. Chief Auto Parts, Inc.	522	461.0
5. Western Auto	517	1310.0
6. Trak Auto	335	293.1
7. The Pep Boys	313	884.7
8. Nationwide Automotive, Inc.	300	290.0
9. Advance Stores, Co.	211	200.0
10. Fisher Auto Parts	131	110.0

Top 10 Jobber Chains: 1991 (Source: Automotive Marketing)

<u>Jobber</u>	<u># Stores</u>	<u>% Wholesale</u>	<u>Sales (\$ Millions)</u>
1. Fisher Auto Parts	181	80%	\$110.0
2. Sieg Auto Parts	121	95%	142.0
3. General Parts	102	80%	75.0
4. Crow - Burlingame	72	75%	34.0
5. Main Auto Parts	35	80%	30.0
6. North Auto Supply	32	75%	19.0
7. Barnes Motor & Parts	27	75%	24.0
8. J. Burdman Auto Parts	27	85%	5.0
9. Motor Bearings & Parts	24	99%	12.0
10. SAS Auto Parts	23	75%	20.0

New England Retailers**ADAP Discount Auto Parts (Auto Palace)**

Wayne Yodzio
660 Bodswell Street, Extension
Avon, MA 02322
Phone: (508) 587-8400
Fax: (508) 584-8772

Benny's, Inc.

Malcolm C. Bromberg, Arnold Bromberg
340 Waterman Avenue
Esmond, RI 02917
Phone: (401) 231-1000

Milford Automotive Warehouse

Richard Mann, Marc Mann
380 Diamond Hill Road
PO Box 519
Woonsocket, RI 02895
Phone: (401) 769-7628
Fax: (401) 765-7632

BCB Automotive

Joe Bunovsky
670 Newfield Street
Middletown, CT 06457
Phone: (203) 347-7848
Fax: (203) 347-8710

Consumer Auto Parts, Inc.

Merrill L. Cohen
222 Summer Street
Worcester, MA 01604
Phone: (508) 798-1827
Fax: (508) 799-5734

Varney Automotive, Inc.

Timothy Varney
725 Broadway
Bangor, ME 04401
Phone: (207) 947-8601
Fax: (207) 947-1243

ACTUAL REPORTED SALES

Most aftermarket chains, both pure retail and jobber, if must be admitted, are privately held and will not tell even their best friends what their annual sales figures are. Therefore, this list reflects only the handful which are required to by law, since they offer public stock sales, and those who are simply not afraid to.

The interesting thing, then, is that each year this list is basically the same as the previous year, so it can be compared from year to year to see some overall aftermarket trends. This year, during which everyone has been crying the blues because of the poor overall economy, has actually seen a rise in the overall sales of the ten

Rank	Chain	'90 Sales (\$100K)	'91 Sales (\$100K)	Address and phone number
1	The Pep Boys	6	1,001,508	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000
2	Northern Automotive	1	707,000	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200
3	Genuine Parts	3	616,000	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700
4	AutoZone	2	412,867	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600
5	Trak Auto	7	319,635	3300 75th Ave., Landover, MD 20785 (301) 731-1200
6	PACCAR	15	195,000	1400 North 4th St., Renton, WA 98055 (206) 251-7600
7	O'Reilly Automotive	13	100,000	233 S. Poterson, Springfield, MO 65802 (417) 862-3333
8	Parts Plus Autocare	16	98,000	601 E. Dudley, Memphis, TN 38104 (901) 523-7711
9	ADAP (Rite Aid)	22	84,804	660 Bodwell St., East Avon, MA 02322 (617) 587-8400
10	Seg Auto Parts	17	46,000	400 N. Main St., Doverport, IA 52801 (319) 323-3641
			TOTAL SALES	3,580,814

largest chains reporting actual sales. Indeed, over, the actual numbers showed only \$396,065 there's been a 12% higher total reported. However, more in sales for 1991 than were made in 1990.

THE 1992 AM LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Boys	\$ Sales (\$100K)	CEO	Address and Phone	% of RT
1	Northern Automotive	801	0	707,000	Julius Tump	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200	95%
2	AutoZone	618	0	412,867	Peter Fomanek	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600	95%
3	Genuine Parts	616	0	616,000	Tom Gallagher	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700	30%
4	Chief Auto Parts Inc.	624	6	380,000	Mike Maner	15303 Dallas Pkwy., Ste 800, Dallas, TX 75248 (214) 404-1114	95%
5	Western Auto	617	3,185	431,000*	John T. Lundegard	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000	95%
6	The Pep Boys—Manny, Moe & Jack	340	2,400	1,001,508	Michael G. Leibovitz	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000	99%
7	Trak Auto	333	0	319,635	Herbert H. Hoff	3300 75th Ave., Landover, MD 20785 (301) 731-1200	95%
8	WSR	332	168	330,000*	Alfred Woods	9A Brickpoint Rd., South River, NJ 08882 (908) 390-9000	95%
9	Nationwide Automotive, Inc.	290	340	290,000*	Soul Levy	3750 Courtright Ct., Columbus, OH 43227 (614) 239-1111	95%
10	Advance Stores Co.	200	0	200,000*	Nicholas Taubman	4342 West Eighth, Roanoke, VA 24015 (703) 345-4911	99%
11	Super Shops	182	385	200,000*	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660 (714) 644-9900	95%
12	Fisher Auto Parts	161	0	160,000*	Art Fisher	612 Greenville Ave., Staunton, VA 24401 (703) 845-8901	20%
13	Discount Auto Parts, Inc.	150	0	150,000*	Dennis L. Fontaine	4900 Frontage Rd., South Lakeland, FL 33802 (813) 687-9224	99%
14	General Parts	142	0	142,000*	Temple Boan	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813	20%
15	PACCAR	138	600	195,000	David J. Hoynd	1400 North 4th St., Renton, WA 98055 (206) 251-7600	99%
16	Parts Plus Autocare (Part, Inc.)	138	12	98,000	Mike Grata	601 E. Dudley, Memphis, TN 38104 (901) 523-7711	35%
17	Seg Auto Parts	126	0	46,000	Maids Bulg	400 N. Main St., Doverport, IA 52801 (319) 323-3641	8%
18	O'Reilly Automotive (Ozark)	122	0	800,000	Charles O'Reilly	233 S. Poterson, Springfield, MO 65802 (417) 862-3333	80%
19	APS (Big A Auto Parts)	120	0	120,000*	Richard J. Speller	3000 Pownee St., Houston, TX 77054 (713) 741-2470	33%
20	HMO Auto Supply Companies	118	0	142,500*	T. Michael Young	8601 Tavenor Lane, Houston, TX 77075 (713) 991-6052	78%
21	Stratco Inc.	94	35	75,000*	David J. Straus	POB 600, San Antonio, TX 78292 (512) 226-0101	30%
22	ADAP (Rite Aid)	89	0	84,804	Wayne Yazko	660 Bodwell St., East Avon, MA 02322 (617) 587-8400	99%
23	Aid Auto	88	0	85,000*	Philip L. Stephen	POB 281, Westbury, NY 11590-0281 (516) 338-7889	95%
24	Republic Auto	80	0	40,000	Keith Thompson	POB 2088, Brentwood, TN 37024 (615) 373-2050	40%
25	Advantage Auto Stores (Mohr)	75	0	73,000*	Mike Fuleman	415 W. Main St., Rochester, NY 14608 (716) 235-1595	40%
26	Parts Depot/Seego Auto Parts	72	0	40,000	Bolance Olson	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001	40%
27	Crow-Burlingame	71	0	34,000	Fletcher Lord, Jr.	520 W. Capital, Box 111, Little Rock, AR 72203 (501) 372-5275	25%
28	AI Automotive	68	0	70,000*	Stuart Bader	4105 S. Creek Rd., Chattanooga, TN 37406 (615) 822-6274	30%
29	Hi-Gear Tire & Auto Supply	65	0	65,000*	Abe Shuster	110 Ritchie Rd., Capital Heights, MD 20743 (301) 336-3000	99%
30	Quality Stores	61	100	200,000	John L. Hill	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491	95%
31	Forest City Auto Parts Co., Inc.	64	0	65,000*	Arnold Bellows	25201 Chagrin Blvd., Ste 350, Beachwood, OH 44122 (216) 292-2525	90%
32	Brooks Auto Parts/Supply	61	0	60,000*	Eton D. Brooks, Jr.	402 S. Peterson Ave., Douglas, GA 31533 (912) 384-7818	45%
33	Kentucky Motor Service (KMS)	60	0	57,000*	Anthony W. Nelner	POB 395, Covington, KY 41011 (606) 431-6025	30%
34	Volley Motor Supply	46	0	40,000	Allen Deedman	2635 S. Belknap Ave., Billings, MT 59107 (406) 259-4577	30%
35	Big Wheel Auto/Road Stores	45	0	33,000	RB Shaler	2300 P. Lot Knob Rd., Mendota Heights, MN 55120 (612) 452-7484	95%
36	Champion Auto Stores	45	90	100,000*	Dane E. Bilbe	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-5984	95%
37	Murray's Discount Auto Stores	40	0	40,000*	Albert Pitt	21500 Trolley Ind. Dr., Taylor, MI 48180 (313) 292-2800	90%
38	Pemgrew-Smith/Dale's	37	0	33,000*	Bob Merrill	8119 Jensen Dr., Houston, TX 77093 (713) 695-3613	95%
39	Ace Auto Parts	35	0	28,000	Jeff Huenhik	4750 118th Ave. N., Clearwater, FL 34622 (813) 573-2800	45%
40	Anderson Auto Parts	35	0	21,000	H.G. Anderson III	POB 767, Anderson, SC 29622 (803) 224-6321	50%
41	The Carpet (Haro Drug)	34	0	20,000*	David Fuhrman	3925 Rice Mine Rd., Tuscaloosa, AL 35406 (205) 345-2400	85%
42	Dov's & Wimer	33	4	19,500*	Gary Davis	609 Epsilon Dr., Pittsburgh, PA 15238 (412) 963-7776	35%
43	Keenan Auto Parts	32	0	16,000*	Frank Anhouse	112 N. Front St., Albany, GA 31703 (912) 432-6241	5%
44	Benny's	29	12	25,000*	Malcolm C. Bromberg	340 Waterman Ave., Esmond, RI 02917 (401) 231-1000	95%
45	Twin 'B' Auto Parts	29	0	16,000	William O'Connor	528 S. Military Hwy., Virginia Beach, VA 23464 (804) 420-3342	99%
46	Wheels Discount Auto Stores (Fry Drugs)	28	0	33,000	Gale Mitchell	4577 Buckley Rd., Liverpool, NY 13088 (315) 652-7000	95%
47	Automotive Supply Asia, Inc. (SAS Auto Parts Co.)	28	0	29,000	George Segal	129 Manchester St., Concord, NH 03301 (603) 225-4000	25%
48	Linkin's Auto Supply	28	0	25,000*	Leonard Linkin	2720 E. 2nd St., Centerville, E. 62801 (618) 533-1311	80%
49	Ben Pilo Speed Shops	28	2	12,000*	Ben Pilo	118 N. Black Horse Pike, Bellmawr, NJ 08031 (609) 931-4041	95%
50	J. Burdman Auto Parts	27	0	8,000	Larry Lamberson	801 N. Franklin St., Yorkville, MD 63501 (816) 665-3787	45%

* Automotive Marketing estimate for 1992.
 * Includes Checker/Schwarz/Kragen, Auto Wats, U-Save, and Crown Auto.
 * Includes company-owned stores only with the stores included.
 * Includes Giant Auto, Makamat, National Auto, Rose Auto, SAS Stores, and Strum Auto.
 * Includes National Automotive Superstores, Save Auto Stores.
 * Includes All Auto Supply and Grand Auto.
 * Includes Fisher's Auto Parts.
 * Includes company-owned stores only with franchises sold to much greater.
 * Includes All-Parts Automotive, Inc., Thrift's Auto Parts, Tony's Parts & Accessories.

THE AM TOP TEN RETAIL CHAINS

(Chains doing 90% or more total/DIYer sales, based on their reported number of stores showing their place on Top 100 list.)

TOP RETAIL CHAINS

Among the largest chains that specialize in selling to the DIY customer, there's a new face this year which is actually an old face with a new name. It's WSR, which is made up of Whitlock, Rose, and R&S/Strauss. This combination made the 1989 Top 100 list as the seventh largest chain under the name of its then British owner, the Ward White Group. However, last year, it was broken down into its components, following its management reorganization and sale to American owners.

Because of the addition of WSR, Discount Auto Parts, which had been on the 1991 list of ten largest retailers, did not appear on the current largest ten list. The chain is, however, still one of

List #	Chain	1991 List #	% DIY	Address
1	Jonathan Automotive	1	95%	645 Missouri Ave., Suite 400, Phoenix, AZ 85012
2	AutoZone	2	95%	3030 Poplar Ave., Memphis, TN 38111
3	Chief Auto Parts Inc.	4	95%	45303 Dallas Pkwy., Ste 800, Dallas, TX 75248
4	Western Auto	6	95%	2107 Grand Ave., Kansas City, MO 64108
5	The Pep Boys	6	99%	3111 W. Allegheny Ave., Philadelphia, PA 19132
6	Back Auto	7	95%	3300 75th Ave., Landover, MD 20785
7	WSR	8	95%	9A Brickyard Rd., South River, NJ 08882
8	Nationwide Automotive, Inc.	9	95%	3750 Courtright Ct., Columbus, OH 43227
9	Advance Stores Co.	10	99%	1342 West Eighth, Roanoke, VA 24015
10	Super Shops	11	95%	620 Newport Center Dr., Ste 850, Newport Beach, CA 92660

the largest players in the field and slow growth, the 1991 and 1992 lists are virtually identical. Other than that, in a year of eight changes

THE 1992 AM LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Boys (+000)	\$ Sales	CEO	Address and Phone	% of DIY
81	Barnes Motor & Parts Co. Inc.	27	0	24,000*	Robert E. Kildand, Jr.	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161	25%
82	One Stop Auto Parts	26	0	20,000	Gerald Klein	1113 62nd Ave. N., St. Petersburg FL 33702 (813) 522-2877	90%
83	Parts City, Inc. (Alux. Seewald)	26	0	13,000	R. Jack Alexander, III	515 Wharton Circle, S.W., Atlanta, GA 30336 (404) 352-0146	99%
84	Auto-Wares	25	0	60,000	Fred A. Bunting	440 Kirtland, S.W., Grand Rapids, MI 49507 (616) 243-2125	30%
85	TM Automotive Parts	25	0	26,000	John Kenney	13140 Alondra Blvd., Cerritos, CA 90701 (213) 926-6582	35%
86	Motor Bearings & Parts Co. (CJS, Inc.)	25	0	12,000	Bill White	427 S. Dawson St., Raleigh, NC 27602 (919) 832-3961	27%
87	Bennett Auto Supply, Inc.	24	0	24,000	Allen Bennett	1099 E. Oakland Park Blvd., Oakland Park, FL 33334 (305) 565-4636	80%
88	Automotive One Parts Stores	24	0	15,000	Robert H. Gentry III	701 W. Church St., Orlando, FL 32802 (407) 422-1110	45%
89	Beltra Discount Auto Parts (Alabama Crankshaft & Engine)	24	0	11,000	Bert Seigel	1432 Mims Ave., Birmingham, AL 35215 (205) 925-4616	40%
90	Himal Auto Parts/Motor Supply	23	0	26,000	Karl Himal	318 W. Simcoe St., Lafayette, LA 70501 (518) 235-1558	30%
91	Mid-State Automotive	23	0	23,000*	Phil Brandenburg	POB 555035, Orlando, FL 32855-5035	35%*
92	Allied Auto Parts Co.	23	0	14,000*	Daniel Sennet	43 N. Montello St., Braintree, MA 02401 (508) 588-8500	30%
93	Kirkham Auto Parts	23	0	10,000	Michael Kirkham	POB 718, Blackfoot, ID 83221 (208) 785-2902	80%
94	AEW (DAPS)	22	0	25,000	Marin Sharon	404 N. Pace Blvd., Pensacola, FL 32505 (904) 434-6484	75%
95	Beacon Auto Parts Co.	22	0	22,000	Fred J. Pisciotto	6013 Enterprise Dr., Export, PA 15632 (412) 733-7077	35%
96	Foreign Autopart Inc.	22	0	21,000	Steve Palkin	1205 Route One, Sharon, MA 02067 (617) 784-1111	30%
97	VP Discount Auto Center	21	49	20,500	Thomas O. Auger	42 Lexington St., Lewiston, ME 04240 (207) 784-5423	99%
98	Acme Auto Supply, Inc.	21	0	20,000	James Fine	620 R. Oakwood Ave., West Hartford, CT 06110 (203) 246-2540	30%
99	Cards	21	0	19,000	Kenneth D. Walker	6240 Deaconso, Buena Park, CA 714-739-5561	40%
100	At-Car Automotive Centers	20	44	20,000	Lester R. Cigel	1520 S. Superior Ave., Antigo, WI 54409 (715) 623-3791	80%
101	Arnold Motor Supply	20	0	16,500	Milo Allen	110 W. 4th, POB 5008, Spencer, IA 51301 (712) 262-4287	20%
102	Royal Auto Supply	20	0	15,000	Jon Stenn	Twin Park Industrial Center, Colmar, PA 18915 (215) 822-1359	95%
103	Sturdevant's Inc.	20	1	14,000	Jack Sturdevant	POB 948, Sioux Falls, SD 57101 (605) 336-0678	30%
104	688 Parts Service, Inc.	20	0	12,000	George E. Tracou Jr.	9126 Green Springs Rd., Baton Rouge, LA 70821-1749 (504) 924-6888	25%
105	Erich/Arnold Auto Parts **	20	0	18,000*	Herbert August	POB 277, Albany, NY 12202 (518) 449-1176	40%
106	Goring's Auto Stores	20	6	10,000*	Albert C. Phernus	117 W. Peach St., Conneville, PA 15425 (412) 628-3340	90%
107	The Flowers Co.	19	0	12,000	John R. Flowers	POB 1118, Hickory, NC 28603 (704) 322-5414	25%
108	Lee's Parts Plus Autocare	19	0	10,000	John Lee	POB 700, De Kalb, TX 75559 (903) 667-2541	40%
109	Mohr Auto	18	0	23,000	Jim E. Mohr	3896 Union Rd., Buffalo, NY 14225 (716) 633-4455	15%
110	Auto Parts World	18	0	16,000*	Andrew Dabrowski	1176 W 14 Mile Rd., Clawson, MI 48017 (313) 288-0845	90%
111	Rodetel's	18	0	12,000	Charles A. Rodetel	96 W. Main, Richmond, IN 47374 (317) 935-7626	50%
112	Milford Auto Parts	17	0	17,000*	Marc Mann	POB 519, Woonsocket, RI 02895 (401) 769-7628	40%
113	National Auto Supply	17	0	17,000*	Clifford Shanfield	8514 Eager Rd., St. Louis, MO 63144 (314) 968-8511	8%
114	HE Everson Auto	17	0	8,000	Mark Sand	2904 Gateway Dr., Grand Forks, ND 58201 (701) 772-4839	25%
115	National Auto Stores	16	0	11,000	David M. Stein	2342 North Penn Rd., Hatfield, PA 19440 (215) 997-1300	70%
116	E. Bankership & Co.	16	0	8,500	Clairence "Henry" Bagby	704 W. Main, Morton, IL 62959 (518) 993-2643	30%
117	Mohr Auto Parts	16	0	16,000*	Barl Weprin	1422 N. Main, Dayton, OH 45405 (513) 277-7393	20%
118	Gilman Auto Parts	15	150	30,000	Ramsay Gilman	7611 Belkore, Houston, TX 77036 (713) 776-7000	10%
119	Porter Auto Supply	15	0	15,000*	W.W. Porter	POB 760, Sumter, SC 29151 (803) 775-6721	10%
120	Von Hausen Auto Parts	15	0	12,000	Robert Neesley	2633 Alta Arden, Sacramento, CA 95825 (916) 362-0691	80%
121	Javis Supply Co.	15	0	11,000	Chris Jarvis	616 Main St., Winfield, KS 67156 (316) 221-3113	25%
122	Auto Parts of Wichita	14	0	9,000	Dennis Stein	1111 S. Rock Rd., Wichita, KS 67207 (316) 685-6242	40%
123	BWP ¹	14	0	26,000*	Neil Stokal	1055 Bronx River Ave., Bronx, NY 10472 (212) 991-9000	1%
124	Motor Supply Warehouse	14	0	25,000	Beryl M. Blanchard	1502 13th St., Box 7, Belle Plaine, IA 52208 (319) 444-2754	30%
125	Scherbas Auto Stores, Inc.	14	0	10,000	Ted R. Scherbas	POB 0, CA 94402 (415) 342-9415	60%
126	Southern Auto Supply	14	0	14,000	Don W. McMurtrey	200 Sonora St., Batesfield, CA 93303 (805) 327-0284	15%
127	Parts Wholesale, Inc.	14	0	14,500*	John B. Doring	POB 1239, Bangor, ME 04401-1239 (207) 941-1230	30%
128	Hapco Auto Parts	14	0	10,000	Richard Halpem	POB 311, Holyoke, MA 01041 (413) 538-8225	25%
129	Doring's Auto Parts	14	0	10,000	Earl G. Seymour	455 Perry Rd., Bangor, ME 04401 (207) 941-1230	15%
130	Bond Auto Parts, Inc.	14	0	8,000	George F. Bond	45 Summer St., Bane, VT 05641 (802) 476-3108	35%

* Automotive Marketing estimate for 1992
 ** Includes company-owned stores only with franchises sold & much greater

THE AM TOP TEN JOBBER CHAINS

(Chains doing 60% or more wholesale sales, showing place on Top 100 list)

TOP JOBBER CHAINS

We've merged the lists we produced last year of top jobber chains and program members because essentially they're the same list. NAPA (Genuine Parts), Federated (Fisher and Seg), Carquest (General Parts and Statco), Big A (APS), and Auto Value (Advantage) are represented by chains here which own stores selling to professional installer customers.

As well, in this period of the whole aftermarket merging into one identity, these chains also have significant retail sales. Indeed, most make at least a quarter of their sales to walk in trade, mostly DIYers searching for parts that aren't usually stocked in their local discount stores. Indeed, only Seg of the whole list says that their

List #	Chain	100 List #	% Whole	Address and Phone
1	Genuine Parts	3	70%	2999 Circle 75 Pkwy, Atlanta, GA 30339 (404) 953-1700
2	Fisher Auto Parts	42	80	812 Greenville Ave., Staunton, VA 24401 (703) 845-8901
3	General Parts	44	80	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813
4	Part's Plus Autostore (Park, Inc.)	46	65	601 S. Dudley, Memphis, TN 38104 (901) 623-7711
5	Seg Auto Parts	47	95	400 N. Main St., Doverport, VA 22801 (819) 323-3641
6	APS (Big A Auto Parts)	49	66	3000 Pownsee St., Houston, TX 77054 (713) 741-2470
7	Statco Inc.	21	70	POB 600, San Antonio, TX 78292 (512) 226-0101
8	Republic Auto	24	60	POB 2088, Brentwood, TN 37024 (615) 373-2050
9	Advantage Auto Stores (Hahn)	25	60	415 W. Main St., Rochester, NY 14608 (716) 235-1595
10	Part's Depot/Steego Auto Parts	26	60	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001

sales to non-professional customers are minimal. Even so, they all define themselves as being in the jobber end of the aftermarket, rather than being retailers per se.

CHAINS WITH SERVICE

Last year we reported that there had been "a tremendous growth in the number of service bays in the ten largest chains which offer professional installation and repair..." This year, however, retrenchment in the face of the overall poor economy has taken its toll, chains have not been building stores with bays or adding bays to older ones to any great degree.

Indeed, the total number of bays reported by the chains which have significant presence in the service business has dropped by 661 bays—from 7,502 to 6,841 bays in all. We'll be watching these numbers closely to see if this suggests a trend away from chains offering service.

It should be noted that there's been a major added player to the list of chains with service, Gilman Auto Parts of Houston, which appeared on the general Top 100 for the first time this year.

THE AM TOP TEN SERVICE PROVIDERS

(Based on number of service bays operated by each chain)

List #	Chain	100 List #	Svc Bays	Address and phone number
1	Western Auto	8	3,185	2107 Grand Ave., Kansas City, MO 64108 (816) 346-6000
2	The Pep Boys	6	2,400	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000
3	PACCAR	15	600	1400 North 4th St., Renton, WA 98055 (206) 251-7600
4	WSR	8	168	9A Brickland Rd., South River, NJ 08882 (908) 390-9000
5	Gilman Auto Parts	84	150	7611 Belkain, Houston, TX 77036 (713) 776-7000
6	Quality Stores	30	100	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491
7	Champion Auto Stores	35	90	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-5984
8	VP Discount Auto Center	63	69	42 Lexington St., Lewiston, ME 04240 (207) 784-5423
9	All-Car Automotive Centers	66	44	1520 S. Superior Ave., Antigo, WI 54409 (715) 623-3791
10	Statco Inc.	21	35	POB 600, San Antonio, TX 78292 (512) 226-0101
TOTAL BAYS			6,841	

TOP SPEED SHOPS

There are actually two more stores operated by the ten largest speed shop chains combined this year than there were on last year's list. In a time when most chains are closing stores or, at best, keeping their heads above water, that's a positive sign.

In all, however, there has been little action in terms of a change in chain names or the number of stores they operate between 1991 and 1992.

It's interesting to note that, while people tend to think of speed enthusiasts being concentrated in the South, the spread of speed shop locations—from Honolulu to Malden, MA, and from Newport Beach, CA, to Morningside, MD—indicates how widespread the hobby is. Indeed, only Seco Performance Centers is located in the traditional motor enthusiast area. There's money in selling to performance and appearance enthusiasts across the whole country.

THE AM TOP TEN SPEED SHOP CHAINS

(Showing percentage of retail sales)

List #	Chain	# of Stores	CEO, Address
1	Super Shops	462	Harry Eberth, 620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
2	Ben Pilo Speed Shops	23	Ben Pilo, 118 N. Black Horse Pike, Bellmawr, NJ 08031
3	Performance Centers of America	20	Donald Raleigh, 180 Whitman Ave., Edison, NJ 08817
4	Ross Auto Parts/Performance	7	Ronald Uemura, 2760 Kihou St., Honolulu, HI 96819
5	Seco Performance Centers	8	John Simmons, 417 University Blvd., Birmingham, AL 35203
6	Speed Unlimited Inc.	5	Peter Mandes, 4771 Alerntown Rd., Morningside, MD 20746
7	United Speed World	4	Tony Lewis, 734 W. Brandon Blvd., Brandon, FL 33614
8	Jag's High Performance Centers	3	Ed Coughlin, 751 E. 11th St., Columbus, OH 43211
9	Van Idarstine Speed & Auto Center	2	Pete Van Idarstine, 245 Rt. 10, E. Hanover, NJ 07936
10	PV Performance Centers	2	Brian Peavey, 124 Eastern Ave., Malden, MA 02148
TOTAL		238	

TOP IMPORT SPECIALISTS

With the ever-increasing number of foreign nameplates on the road, it would be reasonable to look for specialists in selling parts for these vehicles. Indeed, there are a number of chains which do specialize in parts for foreign nameplates. There are, however, fewer of these specialists than there are performance specialists, at least in terms of chains which own multiple outlets.

As may be expected, most of the import parts specialist chains are headquartered along the West Coast. There are none in the Great Plains states, where foreign nameplate vehicles are as rare as blue jeans these days.

Interestingly, one chain on our list, headquartered in Texas, specializes in Japanese parts and accessories, while another, headquartered in Missouri, specializes in European parts and

THE AM TOP TEN IMPORT SPECIALIST CHAINS

List #	Chain	# of Stores	\$ Sales (+000)	CEO and Address
1	Foreign Autopart Inc.	22	21,000	Steve Patch, 1205 Route One Sharon, MA 02067
2	Moto Imported Auto Parts	4	3,000	Bob Edwards, 4469 Beech Rd., Marlow Heights, MD 20748
3	Japanese Auto Parts	4	2,000	Bill Denny, 10711 E. Northwest Hwy., Dallas, TX 75238
4	Discount Import Parts Inc.	4	1,500	Bruce Marshall, 2704 E. 22d St., Tucson, AZ 85713-2006
5	Wp Imported Auto Parts	4	1,200	William Lilly, 4225 Poplar Level Rd., Louisville, KY 40213
6	Foreign Machine & Parts	3	3,000	Al Walden, 3313 Jackson Ave., Memphis, TN 38122
7	European Car Parts	3	2,000	Larry Heritage, 1015 McClelland Ave., St. Louis, MO 63117
8	Olympic Import Parts	3	3,000	W. Michael Brown, 8168 Eisenhower Ave., Alexandria, VA 22304
9	Roger's Foreign & Domestic	2	2,000	David Murphy, 111 High St., Pottstown, PA 19464
10	Body Import Auto Parts	2	900	Ken Nebling, 880 E. Oakland Park Blvd., Ft. Lauderdale, FL 33308
TOTALS		61	39,660	

accessories. At least, that's what their corporate files would indicate. Otherwise, the chains offer coverage of both Asian and European vehicle parts.

Retailer Notes

Auto Palace (formerly ADAP): Danvers, MA

- 1991: 15M SKUs (on average carried). Increased by 6M SKUs (1990)
- Growth area: Hard Parts (more profitable area) (C, D, W, part no.s)
- Eliminate Duplications & Slow Moving Accessories
- Trend: Retailers becoming more like jobbers
- Accessories & Chemicals are not selling well in '92. (It's more of a Mass Merchant business in these areas.)
- Hard Parts: only competitor is the local jobber.
- Light Parts (Plugs, Filters, other A-B items): tight margins, very competitive prices
- Tires: Compete against Specialty chains & Tire Manufacturers
- 3 step Distribution (WD → Jobber/Dealer → DIYer) has declined from 83% ('80) to 67% ('90)
- Customer: DIYer & Professional Mechanic
- 1/3 of all walk-in traffic into Auto Palaces may be Professional Mechanics.
- W/Ds: losing their A & B item sales to Retail stores; forced to carry more C, D & W items

AutoSource - Indianapolis, IN

- 3 stores, 18,000 avg. SKUs per store
- U.S. venture of Canadian Tire Corp. (Toronto), w/417 stores and \$3 Billion in sales
- Automotive Superstore concept, paralleling Home Depot in the Home Center channel.
- Each store is approx. 50M sq. feet, with 17M sq. ft. dedicated to service (bays).
- Product selection, line depth & low prices combined with knowledgeable clerks and store installation (service)
- 100 stores plan to be built over the next 7 years (5 new ones scheduled in 1992).

Aftermarket Chains

- Pep Boys on track for its first ever \$1 Billion in sales year (330 store chain).
- Auto Zone on track to surpass \$818 million 1991 sales record year.
- Hi-Lo Sales & Net Income are up.
- New chain, Auto Source (Indpls) owned by Canadian Tire. New store combines Auto Parts, Tires, & Service under one roof. Aiming at 150 stores across the Midwest.

1991 Inventory Analysis (Source: Hatch Grinding Co.)
 (How one Warehouse Distributor breaks down his inventory)

<u>Item</u>	<u># of SKUs</u>	<u>% of Demand</u>	<u>Turns</u>
A	4325	45%	6.7
B	4425	61	6.1
C	4950	71	5.1
D	7679	80	3.8
W	11,084	88	3.1
Others	<u>66,874</u>	100	<u>1.8</u>
	99,337		4.2

Retailers: stock A & B items

Large Parts-oriented chains: A, B, & C items

Best jobbers will also stock D items.

RETAIL SCOREBOARD

HOME CENTERS

The NHCN Top 500 Retailers

Rank 1990	Company	Sales (\$ mil.)		% Change 1990-1991	% DIY		Stores		Sq. Ft.		Size store avg. 1991	Employees		% of Employees part-time 1991	Buying/mktg group 1991
		1991	1990		1991	1990	1991	1990	Store avg. 1991	Chain total 1991		1991	1990		
1	Home Depot, Atlanta	5,137	3,815	34.7	80	80	174	145	102,900	16,480,000	30,000	30,800	21,500	8	
2	Lowe's Cos., North Wilkesboro, N.C. ¹	3,056	2,833	7.9	69	66	306	309	26,200	8,016,136	25,000	18,368	16,000	17	
3	Payless Cashways, Kansas City, Mo. ²	2,390	2,229	7.2	60	75	195	195 ³	80,000	15,600,000	18,000	18,800	17,000	NA	
4	Builders Square, San Antonio	2,050	1,890	8.5	70	70	150	144	83,000	12,500,000	32,500	17,900	17,000	NA	
5	Hechinger, Landover, Md. ³	1,615	1,392	16.0	95	95	116	115	80,000	9,285,000	40,000	15,800	16,000	50	
6	HomeClub, Fullerton, Calif. ⁴	1,400	1,260	11.1	75	100	73	66	113,000	8,249,000	30,000	9,900	8,500	NA	
9	Menard Inc., Eau Claire, Wis.	965	800	20.6	95	100	60	48	70,800	4,200,000	30,000	3,500	NA	38	
8	Grossman's, Braintree, Mass.	806	813	-0.9	81	84	139	155	32,800	4,565,000	25,800	4,700	5,200	38	
11	Eighty-Four Lumber, Eighty Four, Pa.	800	767	4.3	50	40	368	342	27,000	10,000,000	5,500	4,500	4,500	NA	
10	Sutherland Lumber, Kansas City, Mo.	792	776	2.1	80	75	80	82	27,800	2,160,000	20,000	3,900	3,000	5	
7	Wickes Lumber, Vernon Hills, Ill.	750	850	-11.8	39	40	141	150	9,500	1,339,000	12,000	4,000	4,500	20	
12	Builders Emporium, Irvine, Calif.	600	600	0.0	90	95	106	112	40,000	3,710,000	25,000	5,000	5,000	50	
13	Scotty's, Winter Haven, Fla. ^{5,7}	600	600	0.0	70	70	158	165	30,000	4,584,000	20,000	6,800	6,300	10	
15	Handy Andy, Schaumburg, Ill. ⁷	500	440	13.6	98	98	56	53	68,000	3,740,000	30,000	5,800	3,500	10	
16	Lanoga, Redmond, Wash. ⁶	462	425	8.7	50	48	137	124	7,700	1,050,000	16,000	2,650	2,300	15	Acc, C, SS
14	Fay 'N Pak, Kent, Wash.	410	499	-17.8	98	98	68	102	32,350	2,200,000	16,000	2,300	2,600	10	
17	Rickel Home Centers, South Plainfield, N.J.	410	421	-2.6	90	100	40	45	40,100	1,604,000	35,000	4,000	5,000	65	
20	Pergament Home Centers, Melville, N.Y.	355	350	1.4	90	80	32	35	46,800	1,440,000	40,000	2,700	3,300	26	
19	Erb Lumber, Birmingham, Mich.	353	360	-1.9	50	45	50	50	10,800	500,000	10,500	1,400	1,750	NA	
21	Harcros Lumber & Building Supplies, Roanoke, Va.	350	350	0.0	50	50	65	68	14,400	936,000	13,000	2,000	2,250	NA	
22	Central Hardware, Bridgeton, Mo. ⁷	340	305	11.5	98	100	38	38	65,000	2,470,800	40,000	4,800	4,000	40	
23	Ernst Home & Nursery, Seattle	336	301	11.6	100	100	73	72	32,000	2,336,000	30,000	2,400	2,300	35	
25	Orchard Supply Hardware, San José, Calif.	310	290	6.9	80	80	37	35	35,000	1,295,000	50,000	3,400	3,200	50	
27	McCoy's Building Supply Center, San Marcos, Texas	309	273	13.2	75	75	98	95	16,300	1,600,000	7,500	1,100	1,100	NA	
24	Wolohan Lumber, Saginaw, Mich.	304	296	2.7	53	51	51	50	26,400	1,346,000	10,000	1,768	1,650	28	
26	Carter-Jones Lumber, Kent, Ohio	300	280	7.1	60	55	146	146	8,000	1,168,000	16,000	4,000	4,000	0	
18	Channel Home Centers, Whippany, N.J.	260	379	-31.4	100	100	52	86	35,000	4,000,000	17,000	3,000	4,000	30	
29	BMC West, Boise, Idaho	219	224	-2.2	25	22	28	28	12,500	350,000	20,000	1,125	1,034	13	C, HWI
30	Carolina Builders, Raleigh, N.C.	210	187	12.3	5	5	21	21	1,800	38,000	8,000	1,003	1,003	0	
28	West Building Materials, Atlanta ⁸	190	257	-26.1	30	30	34	46	27,000	972,000	10,000	1,300	1,900	0	
31	Meeks Building Centers, Springfield, Mo. ⁹	171	171	0.0	40	40	30	29	15,200	455,000	12,000	700	700	25	HWI
33	Copeland Lumber Yards, Portland, Ore.	152	154	-1.3	40	35	73	73	5,000	365,000	6,500	750	800	NA	
41	Foxworth-Galbraith Lumber, Dallas	142	111	27.9	30	35	44	46	8,000	603,182	10,000	1,200	892	2	
38	The Andersons, Maumee, Ohio	140	135	3.7	95	95	6	6	120,800	720,000	80,000	900	900	70	
34	Leeds Building Products, Marietta, Ga.	140	150	-6.7	10	15	18	28	7,500	135,000	11,000	425	800	33	
36	Miron Building Products, Kingston, N.Y. ⁹	130	140	-7.1	30	25	8	7	20,000	150,000	45,000	400	NA	8	BMA, SS
32	Terry Cos., Tarzana, Calif.	130	165	-21.2	6	5	16	14	5,700	91,000	25,000	540	585	2	
40	Westlake Hardware, Lenexa, Kan.	120	111	8.1	95	95	51	52	22,400	1,144,000	30,000	1,120	1,200	30	Acc
37	Dixieline, San Diego	115	136	-15.4	50	29	10	10	20,000	200,000	28,000	700	874	10	HWI
46	Fagen's Building Centers, Wexford, Pa.	110	100	10.0	20	15	28	26	10,350	290,000	10,000	600	590	NA	
39	Anderson Lumber, Ogden, Utah	107	113	-5.3	30	30	23	21	6,000	138,000	15,000	650	650	5	CBS
43	Parr Lumber, Aloha, Ore.	107	102	4.9	20	30	10	9	10,000	100,000	20,000	250	270	5	BMA
48	Stambaugh-Thompson, Youngstown, Ohio	104	94	10.6	90	100	21	21	30,100	633,000	23,000	1,200	1,300	40	
45	Seigle's Home & Building Centers, Elgin, Ill.	104	100	4.0	60	60	8	8	35,000	280,000	18,000	600	616	25	BMA, CBS
44	Alexander Lumber, Aurora, Ill.	100	102	-2.0	30	20	50	50	4,000	144,000	10,000	400	390	0	HWI
42	Strober Organization, Brooklyn, N.Y.	100	110	-9.1	15	15	10	9	10,200	102,000	8,000	450	380	0	SS
47	Valu Home Centers, Buffalo, N.Y.	94	94	0.0	85	100	28	28	27,000	756,000	15,000	225	225	0	
49	Wolf Organization, York, Pa. ¹⁰	92	92	0.0	30	30	36	35	2,000	72,000	4,000	320	245	20	LMC
50	Chase-Pitkin, Rochester, N.Y.	90	90	0.0	90	90	13	12	46,150	600,000	30,000	1,550	1,400	4	BMA
51	Hill-Behan Lumber, St. Louis	90	90	0.0	70	70	33	33	12,000	396,000	10,000	650	650	0	
52	Edward Hines Lumber, Itasca, Ill.	90	90	0.0	50	40	23	25	13,000	300,000	9,000	1,000	NA	5	
56	ACO Inc., Farmington Hills, Mich.	88	87	1.1	90	90	70	70	10,000	840,000	15,000	1,300	1,400	40	SS
57	Leaner Home Center Inc., York, Pa.	87	87	0.0	80	80	5	6	15,000	77,000	10,000	90	90	2	C
54	Thompson Building Materials, Orange, Calif.	86	89	-3.4	21	20	9	9	NA	NA	1,500	270	220	0	

¹ In process of converting many of its smaller stores to 65,000- to 100,000-square-foot stores.
² Sales from Commerce Lumber (\$244 million). Last year, remodeling tore down wall between stores and adjacent warehouse, making the selling floor in many units 80,000 square feet.
³ 100,000 square feet average (77 Hechingers); 100,000 (33 HomeQuarters Warehouse); 35,000 (6 Triangle Building Centers)
⁴ Merged name to HomeSense 4/92.
⁵ Single square footage includes calculation for 110 home centers and 48 hardware stores.
⁶ Includes Lumberman's, Spencers and United Building Centers chains.
⁷ Operated by Belgium's GB Group
⁸ Formerly a division in California.
⁹ New store opened in Liberty, N.Y., in April.
¹⁰ Includes two window and door stores

Buying group designations:
 A = Allied Building Stores; BMA = Builder Marts of America; BW = Builders World; C = Cotter; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nation; ENAP = National Home & Profit; HHW = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen's Merchandising Corp.; NSDA = National Supply Distributors Association; P = Peddlers; PAL = Progressive Allied Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServStar.

RETAIL SCOREBOARD

Rank	1990	Company	Sales		% Change 1990-1991	% DfY		Stores		Sq. Ft.		Employees		% of Employees part-time 1991	Buying/ mktg group 1991	
			(\$ mil.) 1991	1990		1991	1990	1991	1990	Store avg. 1991	Chain total 1991	Store avg. 1991	1991			1990
35	35	Gerrity Lumber, Newton Upper Falls, Mass.	83	140	-40.7	40	25	13	16	9,600	125,000	15,000	325	400	10	
56	58	Church's Lumber Yards, Utica, Mich.	82	80	2.5	60	75	16	16	20,000	320,000	15,000	525	480	50	BMA, LMC, PAL
57	53	Pelican Building Centers, Conway, S.C.	80	89	-18.1	25	25	12	12	10,000	120,000	15,000	350	350	NA	LMC
58	55	A.C. Houston Lumber, Wichita, Kan.	80	89	-10.1	20	15	8	8	15,375	123,000	14,000	300	350	5	Ace, BMA
59	64	Yardbirds of California, Petaluma, Calif.	78	70	11.4	85	90	9	8	43,750	400,000	24,000	400	330	1	
60	59	Builders Discount, North Hollywood, Calif.	70	80	-12.5	50	50	4	5	125,000	500,000	25,000	220	240	20	
61	67	National Home Center, Springdale, Ark.	70	67	4.5	46	43	5	5	42,600	213,000	18,000	520	472	7	BMA, HWI
62	63	Builderway Inc., Greenville, S.C.	70	72	-2.8	20	15	14	13	7,900	110,000	8,000	370	350	1	BMA
63	61	Scherer Brothers Lumber, Brooklyn Park, Minn.	70	75	-6.7	10	10	2	2	5,000	10,000	9,000	275	250	5	HWI
64	62	Lyman Lumber, Excelsior, Minn.	70	73	-4.1	5	5	3	3	25,000	75,000		150	150	2	LMC
65	60	Barr Lumber, Los Alamitos, Calif.	65	80	-18.8	25	20	6	6	25,000	150,000	10,000	230	240	1	HWI
66	66	Cox Lumber, St. Petersburg, Fla. ¹¹	64	68	-5.9	20	20	20	12	7,250	145,000	8,000	550	500	0	SS
67	75	Star Lumber & Supply Co., Wichita, Kan.	63	57	10.5	50	36	4	4	27,800	90,000	24,000	475	475	14	BMA, CBS, HWI
68	68	Courtesy Home Centers, Mt. Prospect, Ill.	62	66	-6.1	95	85	6	6	66,700	400,000	25,000	750	600	40	BMA
69	69	Paty Co., Pinedy Flats, Tenn.	61	64	-4.7	50	57	8	8	25,000	200,000	16,000	400	400	15	LMC
70	74	Lumber City, Van Nuys, Calif.	58	58	0.0	100	95	7	8	16,190	240,000	28,000	300	NA	0	
71	96	Great Plains Supply, Roseville, Minn.	58	48	20.8	25	30	27	34	5,550	150,000	15,000	300	294	2	BMA
72	76	NHD Stores, Stoughton, Mass.	57	56	1.8	90	100	35	35	15,400	540,000	40,000	700	676	50	
73	79	Curtis Lumber, Ballston Spa, N.Y.	56	54	3.7	60	54	9	8	10,000	90,000	17,000	250	280	4	LMC
74	86	Blackstone Co., East Brunswick, N.J.	55	51	-7.8	10	10	4	4	25,000	100,000	10,000	200	260	0	
75	95	City Mill, Honolulu	53	48	10.4	85	85	5	5	45,000	225,000	15,000	420	421	NA	
76	77	Sunrise Build 'N Grow, Hayward, Calif. ¹²	52	55	-5.5	95	95	14	14	28,600	400,000	12,000	350	400	20	
77	65	Henry Bacon Building Materials, Issaquah, Wash.	52	70	-25.7	40	40	5	5	16,000	80,000	20,000	350	400	1	BMA
78	83	Brown-Graves Co., Akron, Ohio	52	52	0.0	25	25	4	4	15,000	60,000	12,000	200	200	10	C
79	72	Ganahl Lumber, Anaheim, Calif.	52	61	-14.8	8	8	3	3	25,000	50,000	20,000	250	280	15	BMA, HWI
80	82	E.C. Barton, Jonesboro, Ark.	51	52	-1.9	45	40	27	27	5,500	150,000	5,000	375	380	13	HWI
81	80	San Lorenzo Lumber, Santa Cruz, Calif.	51	54	-5.6	40	40	5	5	3,000	15,000	12,000	240	190	3	Ace
82	92	Monarch Building Supply, Honolulu	51	49	4.1	40	40	7	7	NA	NA	18,000	250	NA	NA	
83	87	Goodman Lumber, San Francisco	50	50	0.0	90	100	4	4	52,500	210,000	12,500	250	200	8	Ace
84	81	Central Michigan Lumber, St. Johns, Mich.	50	52	-3.8	55	65	6	5	6,000	35,000	14,000	175	150	10	
85	88	Hamilton Lumber & Home Center, Hamilton, Mich.	50	50	0.0	50	50	3	3	25,000	75,000	13,000	60	60	2	C, PAL
86	90	Piedmont Lumber & Mill, Pleasant Hill, Calif.	50	50	0.0	40	35	6	6	15,000	90,000	40,000	245	210	4	Ace
87	93	Stock Lumber Inc., Green Bay, Wis.	49	49	0.0	30	20	9	8	10,000	90,000	NA	500	NA	NA	BMA, Our Own
88	84	Lezzer Cash & Carry, Curwensville, Pa.	48	51	-5.9	50	50	7	7	12,000	84,000	15,000	250	257	5	LMC, SS
89	111	Ridout Lumber, Searcy, Ark.	48	41	17.1	50	50	9	9	11,600	104,000	3,500	185	150	6	
90	89	Bellevue Builders Supply, Schenectady, N.Y.	48	50	-4.0	40	40	1	1	42,000	42,000	19,500	195	188	20	Ace
91	98	Haddonfield Lumber, Cherry Hill, N.J.	48	48	0.0	10	10	7	6	11,000	78,000	7,000	200	170	10	Ace
92	99	Fox Home Center, Chicago	47	47	0.0	50	50	4	4	20,000	80,000	17,500	100	100	25	HWI
93	97	H.P.M. Building Supply, Hilo, Hawaii ¹³	47	48	-2.1	30	20	5	4	21,600	108,000	20,000	240	200	0	A-P
94	101	M.L. Claster & Sons, Bellefonte, Pa.	46	46	0.0	55	50	11	11	11,000	121,000	12,000	240	270	NA	BMA
95	103	Bison Building Materials, Houston	46	45	2.2	50	50	4	4	6,000	24,000	1,000	375	375	2	
96	85	Riverhead Building Supply, Riverhead, N.Y.	46	51	-9.8	40	30	4	4	15,000	60,000	13,000	180	200	0	ENAP, RS
97	112	Lampert Yards, St. Paul, Minn.	45	41	9.8	35	45	31	30	11,000	370,000	15,000	225	210	0	HWI
98	71	General Building Products, Medford, N.Y.	45	62	-27.4	30	35	6	8	22,500	135,000	15,000	200	241	2	
99	78	Hancock Lumber Co., Casco, Maine	43	55	-21.8	40	40	9	9	3,500	31,500	15,000	200	197	2	ENAP
100	105	Plywood Minnesota, Minneapolis	42	42	0.0	65	45	11	13	35,400	390,000	7,000	350	375	25	
101	113	Spain and Rose Lumber, Dubuque, Iowa	42	40	5.0	60	60	23	22	4,600	105,000	11,000	195	185	13	HWI
102	104	Standard Supply & Lumber, Grand Rapids, Mich.	42	45	-6.7	20	25	11	10	4,500	50,000	10,000	225	200	5	Ace, CBS
103	107	Big Tin Barn, Conroe, Texas	42	42	0.0	15	30	5	4	9,000	45,000	12,000	110	110	0	BMA
104	108	Builders Supply, Omaha, Neb.	42	42	0.0	15	11	1	1	20,000	20,000	30,000	200	200	10	HWI
105	102	Causeway Lumber, Ft. Lauderdale, Fla.	42	46	-8.7	10	15	2	3	8,350	16,700	9,500	215	280	0	C
106	247	Williams Brothers, Duluth, Ga.	41	21	95.2	5	10	5	4	50,000	250,000	4,000	160	140	0	
107	73	Busy Beaver, Pittsburgh	40	59	-32.2	95	95	10	13	27,000	270,000	15,000	450	729	40	
108	121	M.G. Building Materials, San Antonio	40	35	14.3	40	60	4	4	10,000	40,000	13,000	100	120	1	BMA, HWI, HWI
109	180	Brookhart Inc., Colorado Springs, Colo.	40	26	53.8	30	30	9	7	11,800	100,000	8,000	200	156	5	Ace, CBS
110	183	West End Lumber Co., Houston	40	26	53.8	10	10	3	3	5,000	15,000	15,000	85	50	5	
111	109	Fairfield Lumber & Supply, Fairfield, Conn. ¹⁴	40	42	-4.8	10	10	2	3	6,000	12,000	7,000	120	100	5	BMA, C, SS

NAIEN estimate
 *Includes sales from Panning Lumber.
 †Oregon liquidating in late April 1992.
 ‡Three home centers (30,000 square feet each) and two paint stores (6,000 square feet each)
 §Includes sales from Moodus Lumber, Moodus, Conn.
 Buying group designations: BMA = Builder Marts of America; BW = Builders World; C = Cotter; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nation; ENAP = Everyone Needs a Profit; HWI = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermens Merchandising Corp.; NSDA = National Supply Distribution Association; P = Pecklers; PAL = Progressive Affiliated Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServStar.
 MICHN chart.

RETAIL SCOREBOARD

Rank 1991	1990	Company	Sales			% Change		% DIY		Stores		Sq. Ft.			Employees		% of Employees part-time 1991	Buying/ mktg group 1991
			1991	1990	1991	1990	1991	1990	1991	1990	1991	1991	1990	1991	1990			
112	115	Feldman Lumber Co., Brooklyn, N.Y.	40	40	0.0	10	15	3	3	2,600	8,000	3,000	120	125	1	SS		
113	94	Holmes Lumber Co., Jacksonville, Fla.	40	49	-18.4	5	5	2	2	14,000	28,000	12,500	200	190	2	BMA		
114	117	Thompson Enterprises, Minnetonka, Minn.*	39	37	5.4	70	70	9	9	10,000	90,000	30,000	600	600	NA			
115	114	Fullerton Lumber, Minneapolis	38	40	-5.0	40	40	23	23	6,000	138,000	15,000	200	250	5	Our Own		
116	132	Stripling Blake Lumber, Austin, Texas	38	32	18.8	25	30	3	3	26,300	79,000	18,000	200	200	5	BMA, HIFW, HWI		
117	119	Western Home Center, Cincinnati	38	36	5.6	20	50	2	2	13,000	26,000	12,000	300	250	0	BMA, LMC		
118	118	Mayfield Building Supply, Arlington, Texas	38	37	2.7	5	5	2	2	6,500	13,000	10,000	125	100	0	BMA		
119	106	Hayward Lumber, Salinas, Calif.	37	42	-11.9	35	42	6	6	15,000	90,000	20,000	201	185	15	BMA, SS		
120	169	Alamo Lumber, San Antonio	36	27	33.3	70	70	14	14	5,000	70,000	10,000	250	250	5	HWI		
121	156	R.P. Lumber Co., Edwardsville, Ill.	36	29	24.1	25	50	11	11	9,100	100,000	12,000	133	130	10	HWI		
122	501	Eagle Hardware & Garden, Tukwila, Wash. ¹³	35	2	NA	85	85	4	4	120,000	465,000	45,000	600	NA	5			
123	212	Central Valley Builders Supply, St. Helena, Calif.	35	23	52.2	35	30	3	2	6,000	18,000	3,000	180	175	2	C		
124	142	Tualatin Valley Builders Supply, Lake Oswego, Ore.	35	31	12.9	30	20	5	4	6,000	30,000	15,000	150	131	5	Ace		
125	150	Woodhaven Lumber & Millwork, Point Pleasant Beach, N.J.	35	30	16.7	25	25	3	3	15,000	45,000	10,000	130	130	0	BMA, SS		
126	124	Moser Lumber Inc., Naperville, Ill.	35	34	2.9	20	25	2	2	40,000	80,000	20,000	225	225	30	HWI		
127	125	Midpac Lumber Co., Honolulu	35	34	2.9	20	15	1	1	9,000	9,000	NA	175	169	1			
128	91	Golden State Lumber, Vallejo, Calif.	35	50	-30.0	8	20	2	2	6,400	12,800	2,500	85	100	1			
129	166	Franklin Building Supply, Boise, Idaho	35	28	25.0	5	5	5	5	9,000	45,000	6,000	170	110	0	BMA, CBS		
130	70	Chandler Lumber Co., Van Nuys, Calif.	35	64		5	5	3	3	20,000	60,000	20,000	120	120	5	Ace		
131	176	P.E. Dolan Lumber, Benicia, Calif.	34	26	30.8	60	60	4	4	11,250	45,000	20,000	160	160	10			
132	123	Babbitt Brothers, Flagstaff, Ariz.	34	34	0.0	40	35	7	7	15,000	105,000	15,000	250	250	0	BMA, CBS		
133	145	Friedman Brothers Hardware, Santa Rosa, Calif.	33	30	10.0	70	70	1	1	60,000	85,000	30,000	200	180	15			
134	138	Century Supply Co., Lombard, Ill.	33	31	6.5	50	50	8	8	11,160	89,290	10,000	200	220	10			
135	161	Mill Creek Lumber & Supply, Tulsa, Okla.	33	28	17.9	35	40	3	3	15,000	45,000	16,000	95	95	NA	BMA, HWI		
136	120	Nassau Suffolk Lumber, Hauppauge, N.Y.	33	36	-8.3	25	30	6	6	3,000	18,000	10,000	150	90	NA	LMC		
137	136	Calcasieu Lumber, Austin, Texas	33	32	-3.1	5	5	1	1	15,000	15,000	20,000	150	150	3			
138	129	Rigg's Supply, Kennett, Mo.	32	32	0.0	75	65	8	8	15,600	125,000	12,000	200	145	NA			
139	148	Manis Lumber (Wheeler's), Rome, Ga.	32	30	6.7	40	32	11	9	6,500	71,500	10,000	185	150	1			
140	177	Herrmann Lumber, Springfield, Mo.	32	26	23.1	30	40	10	10	8,000	80,000	10,000	170	163	10	Our Own		
141	139	Peter Lumber, Pleasantville, N.J.	31	31	0.0	40	35	13	12	0,000	50,000	8,000	52	52	0	PKS		
142	130	Fingerle Lumber, Ann Arbor, Mich.	31	32	-3.1	35	35	2	1	20,000	40,000	10,000	150	130	10	BMA, HWI		
143	141	Masten Home Centers, Milford, Del.	31	31	0.0	30	27	7	7	10,800	76,000	17,000	200	213	NA	LMC		
144	134	Builders General Supply, Little Silver, N.J.	31	32	-3.1	25	15	4	4	5,000	20,000	15,000	150	125	NA	Ace		
145	122	All American Home Center, Downey, Calif.	30	34	-11.8	100	100	1	1	145,000	145,000	90,000	270	300	50	C		
146	126	H&E Do-It-Yourself Home Centers, Victorville, Calif.	30	33	-9.1	95	95	6	6	41,666	250,000	24,000	250	300	0	HWI		
147	144	Hacienda Home Centers, Albuquerque, N.M.	30	30	0.0	90	90	6	6	23,300	140,000	15,000	270	280	15	BMA		
148	502	Builders Express, San Antonio ¹⁴	30	NA	NA	90	90	3	3	117,000	352,000	30,000	352	352	NA			
149	185	Supply One Inc., Reno, Nev.	30	25	20.0	85	85	5	3	45,000	225,000	30,000	200	170	50	Ace, BMA		
150	147	Williams Lumber & Home Center, Rhinebeck, N.Y.	30	30	0.0	40	40	3	3	16,600	50,000	12,000	100	150	NA	Ace		
151	116	Westside Building Materials, Anaheim, Calif.	30	40	-25.0	30	10	1	1	1,200	1,200	8,000	60	50	3			
152	133	Millard Lumber, Omaha, Neb.	30	32	-6.3	25	25	3	3	20,000	57,000	25,000	200	200	2	BMA, HWI		
153	131	Moyrhan North Reading Lumber, N. Reading, Mass.	30	32	-6.3	25	30	2	2	4,000	8,000	6,000	90	78	5	Ace, CR, ENAP		
154	100	Kogel Giant Builders Supply, Middle Island, N.Y. ¹⁵	30	47	-36.2	15	15	3	7	3,500	11,000	8,000	60	NA	3	SS		
155	110	Pine Tree Lumber, Escondido, Calif.	30	42	-28.6	10	10	3	3	12,000	36,000	12,000	120	180	1	Ace		
156	154	Kempville Building Materials, Virginia Beach, Va.	30	30	0.0	10	10	2	1	12,000	24,000	12,000	170	150	0	BMA, IBSA		
157	174	Ziegler Building Centers, Spokane, Wash.	29	26	11.5	75	75	10	9	27,000	270,000	4,500	150	123	3			
158	157	Hammond Lumber Co., Belgrade, Maine	29	29	0.0	40	40	5	5	8,000	40,000	15,000	125	125	5	BMA, LMC, SS		
159	149	Nickerson Lumber Co., Orleans, Mass.	29	30	-3.3	30	26	7	7	18,570	130,000	22,000	167	155	7	LMC		
160	140	Richardson Industries, Sheboygan Falls, Wis. ¹⁶	29	31	-6.5	20	30	2	2	10,000	20,000	11,500	50	35	3	BW, HWI, PAL		
161	194	National Lumber, Mansfield, Mass. ¹⁷	29	25	16.0	15	15	3	3	30,000	90,000	20,000	85	70	5	SS		
162	186	Hughes Lumber, Tulsa, Okla.	28	25	12.0	80	75	10	10	12,000	120,000	13,500	170	170	0			
163	173	Thurman Industries, Kirkland, Wash.	28	26	7.7	80	80	15	15	15,000	150,000	9,500	140	140	8	NSDA		
164	146	Marvin's Inc., Trussville, Ala. ¹⁸	28	30	-6.7	50	50	12	12	22,000	264,000	NA	500	500		LMC		
165	179	Choo Choo Supply, Vidalia, Ga.	28	26	7.7	40	35	7	7	12,850	90,000	9,000	140	160	15	BMA, HWI		

¹⁴HW estimate
¹⁵One store (Spokane, Wash.) opened in December 1990.
¹⁶Company went out of business 3/31/92.
¹⁷Worcester, Mass., store is 60,000 square feet.
¹⁸Buying group designations:
 A-Prof; ABS = Allied Building Stores; BMA = Builder Marts of America; BW = Builders World; C = Cotter; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nest; ENAP = Everyone Needs a Profit; HIFW = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen Merchandising Corp.; NSDA = National Supply Distributors Association; P = Peddlers; PAL = Progressive Allied Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServStar.
 AH-ICW chart

RETAIL SCOREBOARD

RANK	1990	Company	Sales			Stores		Sq. Ft.		Store		Employees		% of Employees part-time 1991	Buying/mktg group 1991	
			(\$ mil.)	1990	% Change 1990-1991	% DIY	1990	1991	Store avg. 1991	Chain total 1991	Store avg. 1991	1991	1990			
160		TAPIAC Co., Carthage, Mo.	28	28	0.0	30	55	11	13	9,700	106,798	15,000	193	300	5	HWI
292		East Coast Lumber & Supply, Fort Pierce, Fla.	28	19	47.4	25	15	6	6	8,333	50,000	15,000	115	120	1	DA, LMC, SS
128		William M. Young, New Castle, Del.	28	33	-15.2	20	15	1	1	44,000	44,000	NA	70	75	12	
143		J.C. Seavely & Sons, Landisville, Pa.	28	31	-9.7	15	15	3	2	13,300	40,000	8,000	220	180	5	LMC, SS
160		Levy's Lumber & Building Centers, Louisville, Ky.	27	27	0.0	75	95	4	4	62,500	250,000	25,000	250	300	NA	
199		Bender Lumber, Bloomington, Ind.	27	24	12.5	65	60	5	6	19,500	98,000	15,000	210	210	15	BMA, HWI
189		Bloedorn Lumber Co., Torrington, Wyo.	27	25	8.0	40	40	18	18	*7,400	133,000	15,000	150	150	0	BMA, Our Own
242		John H. Myers & Son, York, Pa.	27	21	28.6	20	20	5	3	26,800	134,000	40,000	97	90	5	BMA, ENAP
171		Southern Sash Sales & Supply, Sheffield, Ala.	27	27	0.0	20	20	4	4	20,000	80,000	25,000	50	50	0	SS
236		Matt's Cash & Carry Building Mat'ls, Pharr, Texas	26	21	23.8	70	55	2	2	50,000	100,000	30,000	168	165	30	BMA, HWI
187		L.H. Rogers Lumber, Oklahoma City	26	25	4.0	65	65	29	30	4,500	130,000	15,000	180	185	0	
164		Stottemyer & Shoemaker Lumber, Sarasota, Fla.	26	28	-7.1	25	10	5	5	7,000	35,000	9,500	200	220	10	DA, SS
182		F.E. Wheaton & Co., Wheaton, Ill.	26	26	0.0	20	10	1	1	10,000	10,000	30,000	100	82	1	LMC
206		Marling Lumber Co., Madison, Wis.	26	24	8.3	15	15	4	2	2,500	10,000		140	100	0	BMA, SS
216		Head Clark Lumber Co Inc., Santa Rosa, Calif.	26	23	13.0	10	10	2	1	10,400	20,800	6,000	100	80	15	C, HWI
165		Ridge Lumber, Baltimore	26	28	-7.1	10	10	1	1	12,000	12,000	10,000	100	100	NA	BMA
167		Raymond Building Supply Corp., N. Fort Myers, Fla.	26	28	-7.1	5	5	3	3	12,000	36,000	5,000	200	180	0	LMC, SS
158		Simon Home Centers, Walnut Creek, Calif.	25	28	-10.7	95	95	3	3	50,000	150,000	10,500	350	258	20	
137		Snyder Diamond, Santa Monica, Calif.	25	31	-19.4	95	95	4	4	9,000	36,000	40,000	140	210	2	
234		Dill's Best Building Centers, Brewster, N.Y.	25	21	19.0	80	75	8	8	15,000	120,000	10,000	170	221	20	HWI
175		C&C Lumber Building Supplies, Tarr, Pa.	25	26	-3.8	50	60	2	1	21,000	42,000	15,000	75	70	5	BMA
188		Your Building Centers, Altoona, Pa.	25	25	0.0	40	50	7	8	5,000	34,000	10,000	150	180	2	
151		California Shingle and Shake Co., Concord, Calif.	25	30	-16.7	25	25	4	4	1,200	4,800	250	80	75	6	
163		Yaeger & Kirk, Santa Rosa, Calif.	25	28	-10.7	25	25	3	3	20,000	60,000	18,000	215	205	5	Ace, BMA
162		Learned Lumber, Hermosa Beach, Calif.	25	28	-10.7	25	35	2	2	6,000	12,000	6,500	45	85	0	HWI
228		Goy C. Lee Building Materials, Smithfield, N.C.	25	22	13.6	20	25	6	6	6,000	36,000	12,000	84	77	2	IBSA
135		Roper Bros. Lumber, Petersburg, Va.	25	32	-21.9	10	10	3	4	4,000	12,000	9,000	125	150	5	Ace, BMA, EN
195		Clay Ingels Co., Lexington, Ky.	25	25	0.0	10	10	2	2	4,000	9,000	8,000	100	100	0	P
152		Riverside Millwork Co., Penacook, N.H.	25	30	-16.7	10	15	7	7	4,300	30,000	300	220	200	1	
207		Estate of George Snyder, Hatfield, Pa.	24	23	4.3	80	93	1	1	60,000	60,000	40,000	125	120	NA	LMC, SS
159		Lumber Headquarters, Brooklyn, N.Y.	24	28	-14.3	75	80	14	13	5,000	65,000	7,500	225	225	10	SS
235		Stine Lumber, Sulphur, La.	24	21	14.3	70	65	4	4	26,250	105,000	10,000	200	180	15	ABS, Ace
198		Ek Supply, Clinton, Okla.	24	24	0.0	60	70	17	18	20,000	340,000	30,000	100	130	NA	C
201		N.A. Mans & Sons, Trenton, Mich.	24	24	0.0	40	40	4	4	10,000	40,000	14,000	150	110	20	BMA, CBS, HWI
211		Steenbecke & Sons, Boscawen, N.H.	24	23	4.3	40	31	7	7	12,000	84,000	13,000	165	155	10	BMA, C
219		Lappo Lumber, Fruitport, Mich.	24	22	9.1	40	65	2	2	15,000	30,000	20,000	95	95	33	BMA, PAL
223		Scott Lumber Co., Bridgeport, Ohio	24	22	9.1	35	35	8	8	15,000	120,000	20,000	257	220	35	BMA
281		Keim Lumber Co., Charn, Ohio	24	19	26.3	30	50	1	1	32,000	32,000	15,000	100	90	0	HWI
202		Lester Group, Martinsville, Va.	24	24	0.0	30	35	4	4	14,375	57,500	13,000	150	130	5	BMA, C, IBSA, SS
239		Chicago Lumber Co. of Omaha, Omaha, Neb.	24	21	14.3	25	25	15	15	6,000	90,000	NA	140	140	1	Ace, Our Own
192		Cedarburg Lumber Co., Cedarburg, Wis.	24	25	-4.0	20	25	2	2	7,500	15,000	15,000	110	105	5	BMA, HWI, LMC
220		Olshan Lumber, Houston	23	22	4.5	60	60	2	2	31,000	62,000	14,000	160	140	6	BMA, HWI, HWI
200		Jaeger Lumber, Union, N.J.	23	24	-4.2	45	60	4	5	18,750	75,000	30,000	100	110	0	Ace, BMA, ENAP
209		Frierson Building Supply, Jackson, Miss.	23	23	0.0	40	40	1	1	7,000	7,000	10,000	160	175	0	BMA, SS
178		Black & Co., Decatur, Ill.	23	26	-11.5	40	40	9	9	22,200	200,000	12,000	250	250	30	C, DA
287		Kight Home Center, Evansville, Ind.	23	19	21.1	30	30	3	3	NA	NA	6,500	115	95	20	BMA, HWI
203		Consolidated Lumber, Stillwater, Minn.	23	24	-4.2	30	30	9	9	4,800	43,000	10,000	130	110	23	LMC
204		Shelly Enterprises, Souderton, Pa.	23	24	-4.2	30	30	3	3	5,000	15,000	20,000	150	165	5	LMC, PRS, SS
226		Wilson Lumber Co., Huntsville, Ala.	23	22	4.5	25	25	2	2	10,000	20,000	12,000	150	150	5	BMA, HWI
214		Lee Lumber & Building Materials, Chicago	23	23	0.0	15	15	2	2	12,500	25,000	11,000	140	135	0	BMA, PRS
273		Great Central Lumber, St. Louis	23	20	15.0	10	10	4	4	5,000	20,000	8,500	80	135	1	HWI
229		Inter-State Lumber Co., Stillwater, Minn.	23	22	4.5	5	20	9	10	NA	NA	5,000	80	85	8	CBS, SS
279		Crafty Beaver Home Centers, Skokie, Ill.*	22	19	15.8	75	75	4	4	20,000	80,000	35,000	NA	NA	NA	C
221		Buchheit Inc., Perryville, Mo.	22	22	0.0	50	50	3	3	13,300	40,000	15,000	60	60	0	BMA
253		Iry-K Lumber, New Hartford, N.Y.	22	20	10.0	40	60	1	1	50,000	50,000	23,000	180	110	0	Ace, LMC
127		Sinclair Lumber, Laurinburg, N.C.	22	33	-33.3	33	30	6	7	16,700	100,000	12,000	90	150	2	Ace, LMC
213		Stan's Lumber Co., Twin Lakes, Wis.	22	23	-4.3	30	25	3	3	4,000	10,000	3,000	80	85	3	CBS, Our Own
193		County Lumber Co., Santa Barbara, Calif.	22	25	-12.0	25	25	3	2	16,700	50,000	1,000	63	60	0	DA
191		Big C Lumber, South Bend, Ind.	22	25	-12.0	25	25	4	5	6,250	25,000	12,000	100	125	10	BMA, C, PAL
227		Big Creek Lumber, Davenport, Calif.	22	22	0.0	25	25	4	4	20,000	80,000	6,000	175	170	0	Ace

*Estimate
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RETAIL SCOREBOARD

1990	Company	Sales			% Change		% D/Y		Stores		Sq. Ft.		Sizs store avg. 1991	Employees		% of Employees part-time 1991	Buying/mktg group 1991
		1991	1990	1990-1991	1991	1990	1991	1990	1991	1990	1991	1990		1991			
196	Gulf Stream Lumber, Boynton Beach, Fla.	22	25	-12.0	20	10	3	3	2,830	8,500	12,000	150	170	10	BMA, C		
230	Maryland Lumber, Baltimore	22	22	0.0	10	10	1	2	5,000	5,000	NA	78	78	0	SS		
215	Walter & Jackson Inc., Christiansa, Pa.	22	23	-4.3	10	11	3	3	5,000	15,000	6,500	101	105	0	BMA, PRS, SS		
250	Borgaars Supply, Sioux City, Iowa	21	20	5.0	90	90	11	11	21,500	237,000	12,500	225	250	0	Ace		
258	Martin Distributors, Alexandria, La.	21	20	5.0	40	30	3	4	13,300	40,000	10,000	85	100	0	H-HW		
256	Truitt & White Lumber, Berkeley, Calif.	21	20	5.0	40	35	2	1	77,500	155,000	20,000	120	110	0	Ace		
270	Manning Building Supplies, Ocala, Fla.	21	20	5.0	15	15	4	4	30,000	120,000	7,000	110	110	0	BMA		
153	Stevenson Lumber Co., Stevenson, Conn.	21	30	-30.0	5	10	1	1	8,000	8,000	1,000	60	150	0			
313	Building Material Supply Co., Tucker, Ga.	21	18		5	5	1	1	24,000	24,000	1,800	73	55	20			
232	Kuesters Inc., Evansville, Ind.	20	21	-4.8	98	90	9	9	21,000	190,000	33,000	250	200	15	HWI		
233	Elliott Hardware, Elm Grove, Wis.	20	21	-4.8	85	80	4	3	31,250	125,000	50,000	300	260	20	Ace		
172	Rocky's Hardware & Home Center, Springfield, Mass.	20	26	-23.1	80	80	7	8	12,000	85,000	25,000	140	180	25	Ace		
278	Chris & Dick's, Salt Lake City	20	19	5.3	80	90	1	1	70,000	70,000	27,000	155	165	5	C		
251	Big L Corp., Sheridan, Mich.	20	20	0.0	75	65	6	6	21,700	130,000	35,000	70	74	10	Ace, LMC		
218	Cramer's Home Centers, E. Stroudsburg, Pa.	20	22	-9.1	75	75	7	7	10,000	70,000	9,000	120	125	2	LMC, SS		
252	White Aluminum Products, Leesburg, Fla.	20	20	0.0	65	65	7	6	38,570	270,000	5,000	200	200	0			
283	Potter's Shopping Center, Jamestown, Tenn.	20	19	5.3	60	45	8	7	11,000	88,000	15,000	120	125	20	Ace, BMA		
297	Newkirk's Ace Hardware Inc., Rapid City, S.D.	20	18	11.1	55	60	7	6	17,900	125,000	30,000	130	160	10	Ace, C		
255	Gordon Lumber Co., Oak Harbor, Ohio	20	20	0.0	50	40	9	9	4,500	40,000	10,000	110	120	10	C, CBS		
254	Economy Building Materials, Denver	20	20	0.0	50	40	3	3	9,000	27,000	13,000	100	100	3	BMA, HWI		
265	McGuire Lumber Co., Yakima, Wash.	20	20	0.0	40	25	1	1	20,000	20,000	8,000	35	35	0	BMA		
208	Hinckley Home Centers, Hyannis, Mass.	20	23	-13.0	40	50	3	4	15,000	45,000	50,000	115	114	2	BMA		
415	Simonson Lumber, St. Cloud, Minn.	20	14	42.9	40	30	7	6	15,000	140,000	3,000	100	80	3	BMA, C, CBS, Our Own		
305	A.J. Smith Co., Nashville, Tenn.	20	18	11.1	35	25	5	4	3,000	15,000	10,000	58	60	5			
331	Du-Bell, Medford, N.J. ¹⁸	20	17	17.6	35	20	4	3	18,750	75,000	25,000	120	100	3	BMA, C, PRS, SS		
210	Lavalley Building Supply, Newport, N.H.	20	23	-13.0	35	35	5	5	8,000	40,000	15,000	120	125	5	C, LMC		
322	Theut Products Inc., Mt. Clemens, Mich.	20	17	17.6	35	35	4	4	5,000	20,000	30,000	100	75	10			
225	Lumas Supply, Atlanta	20	22	-9.1	35	25	4	4	10,500	42,000	7,500	61	62	0	HWI, SS		
205	One Source Home & Building Centers, North Little Rock, Ark.	20	24	-16.7	30	30	4	4	7,500	30,000	10,000	135	160	NA	Ace		
260	JH Patterson Co., Rockford, Ill.	20	20	0.0	25	25	10	10	2,000	20,000	NA	100	100	10	BMA, PRS		
324	Zarsky Lumber Co., Victoria, Texas	20	17	17.6	25	30	6	6	6,500	40,000	8,000	115	120	4	Ace, CBS, H-HW		
257	Coler Brothers, Tucker, Ga.	20	20	0.0	25	30	1	1	15,000	15,000	500	70	85	3	SS		
261	Albert R. Lavalley Lumber, Sanford, Maine	20	20	0.0	25	25	3	3	6,700	20,000	9,000	130	NA	5	C, LMC		
259	Sterling Lumber & Investment Co., Denver	20	20	0.0	25	30	10	10	15,255	152,550	7,000	95	100	2			
262	Jordan & Bradley Building Supply, Columbus, Ga.	20	20	0.0	20	25	3	3	NA	NA	5,000	80	NA	0	CBS		
266	Jones Lumber Co. Inc., Lynnwood, Calif.	20	20	0.0	20	20	1	1	5,000	5,000	10,000	100	NA	0			
268	BNR Beatty Lumber Co., Oak Lawn, Ill.	20	20	0.0	20	20	4	3	6,750	27,000	6,000	100	72	6	HWI, PRS		
170	IT's Home & Builders Centers, Newport, R.I.	20	27	-25.9	20	20	3	4	8,000	24,000	13,000	100	125	2	ENAP		
237	Broadway Lumber Co., New York	20	21	-4.8	20	40	4	4	10,000	40,000	5,000	100	120	5	SS		
269	Moss Lumber Co., Redding, Calif.	20	20	0.0	15	15	2	2	6,000	12,000	18,000	120	120	25	C		
243	Dykes Lumber Co., Weehawken, N.J.	20	21	-4.8	15	20	6	6	3,000	18,000	5,000	95	100	5	LMC		
276	Hartje Lumber Inc., La Valle, Wis.	20	20	0.0	10	10	1	1	5,000	5,000	5,000	35	38	0			
295	Chintimini Forest Products Inc., Albany, Ore.	20	19	5.3	10	10	3	3	9,700	29,000	7,000	29	29	0			
264	W.T. Harvey Lumber Co., Columbus, Ga.	20	20	0.0	10	25	4	4	10,000	40,000	10,000	150	130	NA	BMA		
249	Home Lumber Co., S. St. Paul, Minn.	20	21	-4.8	5	5	2	2	16,000	32,000	2,500	50	50	5	BMA, HWI		
184	Wilson Brothers, Fredericksburg, Va.	20	26	-23.1	5	5	4	4	6,250	25,000	10,000	120	120	5	LMC, SS		
197	Crenshaw Lumber, Gardena, Calif.	20	25	-20.0	5	10	1	1	3,500	3,500	3,000	50	NA	0			
296	Mead Building Centers, Columbus, Neb.	19	18	5.6	60	60	16	15	3,875	62,000	7,000	135	120	10	BMA, HWI		
340	Butz Building Centers, Palmerton, Pa.	19	16	18.8	40	50	4	6	5,500	22,000	16,000	100	104	5	C		
284	Earl Lataha Lumber Co., Harrisburg, Pa.	19	19	0.0	40	40	1	1	40,000	40,000	10,000	53	56	0			
300	DeGol Brothers Lumber Co., Gallitzin, Pa.	19	18	5.6	40	50	4	4	10,000	40,000	5,500	80	80	10			
285	Elsworth Builders Supply, Elsworth, Maine	19	19	0.0	35	32	8	8	NA	NA	6,000	100	75	4	LMC, SS		
222	The Dunn Corp., Daytona Beach, Fla.	19	22	-13.6	30	50	6	6	8,300	50,000	20,000	150	150	15	Ace		
301	Mortimer & Son Lumber Co., Port Huron, Mich.	19	18	5.6	30	40	4	4	10,000	40,000	14,000	80	80	1	C, LMC		
326	Doug Ashy Building Materials, Lafayette, La.	19	17	11.8	30	30	3	3	16,700	50,000	12,000	115	100	0	LMC		
288	Southport Lumber & Supply, Kenosha, Wis.	19	19	0.0	30	30	4	4	6,750	27,000	NA	60	NA	30	HWI		
245	Riemeier Lumber Co., Cincinnati	19	21	-9.5	25	10	1	1	15,500	15,500	4,000	58	59	NA			

¹⁸ Formerly called Christy's Supplies.
 Group designations: BMA = Builder Markets of America; BW = Builders World; C = Cotter; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nation; ENAP = Eastern National; H-HW = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen Merchandising Corp.; NSDA = National Supply Distributors; P = Packers; PAL = Progressive Affiliated Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServStar.
 AHCN chart

RETAIL SCOREBOARD

Rank 1990	Company	Sales		% Change 1990-1991	% DIY 1991	Stores		Sq. Ft.		Stores store avg. 1991	Employees 1991	% of Employees part-time 1991	Buying/ mktg group 1991		
		1991	1990			1991	1990	Store avg. 1991	Chain total 1991						
286	A.L. Kippo Co Inc., Honolulu ¹⁹	19	19	0.0	25	30	1	1	300,000	300,000	300,000	130	160	5	
290	Strait & Lamp Lumber Co., Hebron, Ohio	19	19	0.0	20	20	4	4	23,000	92,000	7,000	96	96	1	HWI
307	Shaw Lumber Co., St. Paul, Minn.	19	18	5.6	20	20	1	1	5,000	5,000	7,000	110	82	2	HWI
240	Tri-County Supply Inc., Pleasantville, N.J.	19	21	-9.5	20	20	4	3	3,000	12,000	NA	75	75	10	
289	Sinclair Supply Co. Inc., Baltimore	19	19	0.0	20	20	3	3	25,000	75,000	5,323	76	NA	0	
294	Triangle Building Supply Inc., Fayetteville, N.C.	19	19	0.0	15	10	2	2	40,000	80,000	12,000	119	130	2	DA
293	Sepulveda Building Materials, Torrance, Calif.	19	19	0.0	15	15	4	4	12,500	50,000	5,862	100	100	10	
272	Boland Maloney Lumber Co., Louisville, Ky.	19	20	-5.0	10	10	2	2	7,250	14,500	7,000	85	80	1	BMA, LMC
248	Livonia Building Materials, Livonia, Mich.	19	21	-9.5	5	5	4	4	2,000	9,500	2,000	50	50	0	SS
316	Brosius-Eliason Co., New Castle, Del.	18	17	5.9	65	60	4	4	18,000	72,000	13,000	120	100	0	LMC, SS
339	Morales Home Centers, Bronx, N.Y.	18	16	12.5	60	60	9	9	30,000	270,000	10,000	40	40	8	DA
381	Standale Lumber & Home Center, Grand Rapids, Mich.	18	15	20.0	55	20	3	2	8,300	25,000	NA	80	70	5	BMA, PAL, SS
298	Whelan's, Topeka, Kan.	18	18	0.0	50	50	4	4	32,500	130,000	20,000	140	160	5	HWI
325	Better Living Inc., Charlottesville, Va.	18	17	5.9	30	30	1	1	12,000	12,000	15,000	80	100	4	HWI, IBSA
238	Lumber One, Avon, Minn.	18	21	-14.3	30	30	2	2	3,600	7,200	16,000	76	82	2	Acc, BMA
224	A.H. Angerstein, Wilmington, Del.	18	22	-18.2	20	30	4	4	8,000	33,000	10,000	90	130	0	PAL, PRS
271	Devlin Lumber & Supply Corp., Rockville, Md.	18	20	-10.0	15	10	1	1	3,000	3,000	14,000	150	150	0	BMA
181	Douglas Lumber Corp., Smithfield, R.I.	18	26	-30.8	15	15	1	1	20,000	20,000	17,000	50	75	15	BMA, CBS
246	Ruffin & Payne, Richmond, Va.	18	21	-14.3	10	10	1	1	4,500	4,500	2,500	105	120	0	BMA
391	Cape Fear Supply, Fayetteville, N.C.	18	15	20.0	10	10	1	1	2,000	2,000	5,500	75	75	0	BMA
310	Lumber City Inc., Chesapeake, Va.	18	18	0.0	10	10	2	2	3,500	7,000	6,000	85	95	3	MA, C
241	Beronio Lumber Co., San Francisco	18	21	-14.3	10	20	1	1	135,000	135,000	3,000	65	67	0	
217	East Coast Builders Supply Corp., Chesapeake, Va.	18	23	-21.7	10	10	2	2	5,000	10,000	10,000	85	80	5	BMA, C
315	Erlanger Lumber Co., Erlanger, Ky.	18	18	0.0	5	5	1	1	2,000	2,000	6,000	50	50	0	LMC
312	Tulroy Lumber Inc., New Rochelle, N.Y.	18	18	0.0	5	5	2	2	1,500	3,000	12,000	79	85	0	
314	West Elizabeth Lumber Co., Elizabeth, Pa.	18	18	0.0	5	5	4	5	6,200	25,000	2,000	65	50	0	
398	Poulsen's Inc., Great Falls, Mont.	17	14	21.4	70	70	1	1	36,000	36,000	6,000	80	70	20	Acc, BMA, Our Own
318	Sash & Door Co., Bellingham, Wash.	17	17	0.0	50	50	2	2	50,000	100,000	10,000	120	120	0	Acc
319	Knoll Lumber & Hardware Co., Kenmore, Wash.	17	17	0.0	40	50	4	4	7,500	30,000	21,000	80	88	0	
317	J.C. Baldridge Lumber Co., Albuquerque, N.M.	17	17	0.0	40	50	2	2	6,500	13,000	20,000	140	140	15	C
282	Whipple Brothers Inc., Tunkhannock, Pa.	17	19	-10.5	40	50	10	10	10,000	100,000	2,600	90	80	3	
321	Allen Lumber Co., Barre, Vt.	17	17	0.0	35	40	5	5	5,000	25,000	15,000	70	80	6	LMC
373	Thomas W. Perry, Chevy Chase, Md.	17	15	13.3	33	30	2	2	17,500	35,000	30,000	140	140	20	BMA, SS
367	Arnold Lumber Co., West Kingston, RI	17	15	13.3	30	40	3	3	6,500	20,000	20,000	85	100	0	SS
329	Montalbano Lumber Co., Houston	17	17	0.0	30	25	2	2	7,500	15,000	8,000	90	85	0	BMA, C, H+HW
346	Mentor Lumber & Supply, Mentor, Ohio	17	16	6.3	30	30	3	3	10,000	30,000	13,000	92	60	20	HWI
304	Mintzer Bros., Rutland, Vt.	17	18	-5.6	30	30	2	2	5,000	10,000	4,000	40	40	3	LMC
328	Rowley Building Products Corp., Middletown, N.Y.	17	17	0.0	25	25	6	6	5,000	30,000	10,000	115	100	8	SS
320	Merrimack Valley Wood Products, Methuen, Mass.	17	17	0.0	20	40	1	1	15,000	15,000	3,000	90	90	0	
390	Winstall Building Materials Co., Wayne, Mich.	17	15	13.3	20	10	2	2	5,000	10,000	7,000	50	41	0	HWI
308	R Lumber Center, Edgewater, Md.	17	18	-5.6	20	15	1	1	3,000	3,000	6,000	90	100	0	BMA, CBS
382	Smoot Lumber Co., Alexandria, Va.	17	15	13.3	20	20	1	1	10,000	10,000	11,000	65	65	5	BMA, SS
332	Alpine Lumber, Denver	17	17	0.0	15	12	4	4	3,000	12,000	4,000	70	70	0	BMA, HWI
395	Columbia Lumber, Columbia, S.C.	17	15	13.3	10	5	5	5	1,000	4,000	4,200	150	NA	1	LMC
274	Hoida Lumber Inc., Green Bay, Wis.	17	20	-15.0	10	10	1	1	6,000	6,000	NA	125	125	0	CBS, LMC
155	Champion Lumber, Riverside, Calif.	17	30	-43.3	5	5	1	1	10,000	10,000	2,500	39	60	0	BMA
277	Pine Cone Lumber, Sunnyvale, Calif.	17	20	-15.0	5	5	1	1	15,000	15,000	NA	75	85	5	BMA
133	Ragnal Builders Supply, Columbia, S.C.	17	17	0.0	5	10	1	1	10,000	10,000	4,500	60	60	0	BMA
396	Allied Trades Inc., Denver	17	15	13.3	5	5	1	1	5,000	5,000	10,000	141	141	0	DA
335	Pintchak Inc., Brooklyn, N.Y.	16	16	0.0	90	90	6	6	12,500	75,000	12,000	150	125	NA	Acc
336	Hardware City Home Center, Silver Spring, Md.	16	16	0.0	85	75	4	4	15,000	60,000	19,000	175	125	30	HWI, SS
134	Dunen Lumber, Seattle ²	16	15	6.7	80	80	10	9	10,000	100,000	NA	100	100	NA	
137	Bering Home Center Inc., Houston	16	16	0.0	70	75	2	2	27,500	55,000	30,000	175	110	25	HWI
368	Higginbotham-Bartlett Co., Lubbock, Texas	16	15	6.7	60	40	36	36	15,000	570,000	10,000	150	150	1	HWI
1341	Payless Building Supply, Chico, Calif.	16	16	0.0	60	50	5	5	6,000	30,000	7,000	100	80	25	BMA
1357	Guadalupe Lumber & Supply Co., San Antonio	16	15	6.7	60	60	2	2	150,000	300,000	9,000	80	55	10	C, H+HW

Common square foot represents seven buildings.

Group designations:
 ABS = Allied Building Stores; BMA = Builders Mart of America; BW = Builders World; C = Corner; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nest; ENAP = Eagle Nest Associates; H+HW = Home Hardware Wholesale; HWI = Hardware Wholesale Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen Merchandising Corp.; NSDA = National Supply Distributors Association; P = Pecklers; PAL = Progressive Affiliated Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServStar.

RETAIL SCOREBOARD

Rank 1991	1990	Company	Sales		% Change 1990- 1991	% DIY 1991	Stores 1991	1990	Sq. Ft.		Size store avg. 1991	Employees		% of Employees part-time 1991	Buying/ mktg group 1991	
			(\$ mil.) 1991	1990					Store avg. 1991	Chain total 1991		1991	1990			
339	434	Norris Rader Inc., New Iberia, La.	16	13	23.1	50	40	3	3	10,000	30,000	7,500	100	100	0	HWI
340	343	A.D. Moyer Lumber & Hardware Inc., Gilbertsville, Pa.	16	16	0.0	50	35	2	2	10,200	20,400	12,000	70	NA	5	SS
341	280	Certified Lumber & Home Center Corp., Brooklyn, N.Y.	16	19	-15.8	50	50	2	2	10,000	20,000	NA	100	100	0	Ace, C
342	363	Economy Builders Supply Inc., Sandy, Utah	16	15	6.7	40	50	3	3	23,000	70,000	7,000	160	180	60	Ace, BMA
343	359	G.V. Moore Lumber Co., Ayer, Mass.	16	15	6.7	40	60	5	5	14,000	70,000	16,000	180	115	10	C, LMC
344	323	F. Diehl & Sons Inc., Wellesley, Mass.	16	17	-5.9	35	35	1	1	37,000	37,000	10,000	62	62	13	LMC, SS
345	374	La Crosse Lumber Co., Louisiana, Mo.	16	15	6.7	30	30	17	17	2,350	40,000	10,000	110	110	5	HWI
346	375	Imperia Brothers Inc., Pelham Manor, N.Y.	16	15	6.7	25	25	2	2	17,500	35,000	30,000	75	75	1	Ace, ENAP
347	347	Barroes Gaithersburg Lumber, Gaithersburg, Md.	16	16	0.0	25	25	1	1	20,000	20,000	17,000	60	NA	10	SS
348	350	Fifth Avenue Lumber Co., Columbus, Ohio	16	16	0.0	20	20	5	5	5,000	25,000	10,000	150	NA	1	HWI
349	442	Orgain Building Supply, Clarksville, Tenn.	16	13	23.1	20	30	1	1	8,500	8,500	11,000	100	70	3	BMA, HWI, LMC
350	291	Buena Park Lumber & Hardware, Buena Park, Calif.	16	19	-15.8	15	20	1	1	22,000	22,000	30,000	75	90	0	Ace, C
351	383	Holmes Lumber & Building Center, Millersburg, Ohio	16	15	6.7	15	15	1	1	7,000	7,000	10,000	48	48	0	SS
352	334	Kleef Lumber Co., Huntington, N.Y.	16	17	-5.9	15	7	1	1	4,000	4,000	NA	50	50	0	SS
353	380	Topeka Lumber Inc., Topeka, Kan.	16	15	6.7	10	20	2	2	62,000	124,000	15,000	50	55	0	BMA, CBS, SS
354	388	Mathews & Fields Lumber Co., Rochester, N.Y.	16	15	6.7	10	10	2	2	2,500	5,000	8,000	70	70	0	HWI
355	488	Scarborough Lumber & Building Supply, Scotts Valley, Calif.	15	11	36.4	80	75	4	4	7,000	28,000	25,000	105	125	15	Ace
356	338	Metropolitan Lumber & Hardware, New York	15	16	-6.3	70	70	4	4	11,250	45,000	10,000	200	200	3	SS
357	401	Bartlett Enterprises Inc., Canadian, Texas	15	14	7.1	70	60	9	9	8,000	72,000	NA	48	48	3	Ace
358	356	Hendrick's, Troy, Ala.	15	15	0.0	70	70	4	4	45,000	180,000	10,000	90	NA	5	Ace, BMA
359	426	Elliott's Hardware, Dallas	15	14	7.5	60	65	2	1	43,000	86,000	32,000	190	128	20	C
360	358	H. Greenberg & Son Inc., Bennington, Vt.	15	15	0.0	60	60	2	2	20,000	40,000	20,000	50	50	2	CBS, ENAP, HWI
361	409	Miner Lumber, Collinsville, Conn.	15	14	7.1	51	48	1	1	17,000	17,000	5,000	60	45	2	LMC, SS
362	361	Goldboro Builders Supply, Goldboro, N.C.	15	15	0.0	50	50	5	5	83,200	416,000	12,000	60	50	5	Ace, IBSA, LMC
363	360	Morsches Builders Mart, Columbia City, Ind.	15	15	0.0	50	50	5	5	12,000	60,000	15,000	80	60	8	RMA, C
364	407	Higginbotham Brothers, Comanche, Texas	15	14	7.1	50	50	18	18	3,000	50,000	15,000	150	150	4	HWI
365	362	Habersham Hardware & Home Center, Cornelia, Ga.	15	15	0.0	50	50	2	2	27,000	54,000	35,000	95	90	2	Ace, BMA, CBS
366	342	Fisher/Malibu Lumber, Santa Monica, Calif.	15	16	-6.3	45	50	2	2	7,500	15,000	19,000	75	100	4	
367	377	Mathew Hall Lumber Co., North St. Cloud, Minn.	15	15	0.0	40	25	2	2	7,000	14,000	3,000	72	70	3	Ace, BMA, LMC
368	365	Sutersville Lumber, Sutersville, Pa. ²⁰	15	15	0.0	40	40	3	3	2,800	8,500	11,000	80	65	0	C, LMC
369	435	Stewart Lumber Co., Dickson, Tenn.	15	13	15.4	40	40	3	3	20,000	60,000	6,000	88	82	10	BMA, HWI
370	411	Siding World Inc., Detroit	15	14	7.1	40	40	7	6	20,000	140,000	13,000	70	70	3	DA, PAL
371	369	Schoeneman Brothers Co., Sioux Falls, S.D.	15	15	0.0	40	40	9	10	6,700	60,000	10,000	100	100	0	
372	440	Black Lumber, Bloomington, Ind.	15	13	15.4	35	33	6	6	8,000	42,000	11,500	74	60	8	CBS, HWI
373	327	Snow Lumber & Home Decorating, High Point, N.C.	15	17	-11.8	30	30	2	2	10,000	20,000	10,000	135	125	5	Ace, BMA, CBS
374	376	Chopp & Co., Waldorf, Md.	15	15	0.0	30	25	1	1	6,000	6,000	1,500	90	75	5	
375	439	Hackmann Lumber Co., St. Charles, Mo.	15	13	15.4	30	35	2	2	12,500	25,000	15,000	110	110	NA	HWI
376	419	Bliffert Lumber & Home Center, Milwaukee	15	14	7.1	25	25	4	4	NA	NA	15,000	50	50	3	HWI
377	190	Midland Lumber & Supply, Midland Park, N.J.	15	25	-40.0	25	30	1	2	10,000	10,000	15,000	70	125	0	Ace, BMA
378	348	Hale Kauai Ltd., Lihue, Island of Kauai, Hawaii	15	16	-6.3	25	25	2	2	6,500	13,000	18,000	74	75	2	C
379	267	Fairfax Lumber & Millwork, Springfield, Va.	15	20	-25.0	25	20	2	2	5,000	10,000	8,000	70	75	0	BMA
380	421	General Wholesale Building Supply, New Bern, N.C.	15	14	7.1	20	20	1	1	110,000	110,000	10,000	110	110	5	LMC
381	306	Morrill Builders Supply Co., Hyde Park, N.Y.	15	18	-16.7	20	20	1	1	12,000	12,000	NA	55	65	0	
382	498	Hundman Lumber Do-It Center, Bloomington, Ill.	15	11	36.4	20	15	1	1	20,000	20,000	20,000	75	50	1	HWI
383	244	Home Lumber, San Bernadno, Calif.	15	21	-28.6	20	20	2	2	10,000	20,000	4,000	35	35	6	HWI
384	384	Northwest Building Materials & Supply, Park Ridge, Ill.	15	15	0.0	15	15	4	4	10,000	40,000	2,000	60	60	0	HWI, PRS
385	352	Elmsford Interstate Building Materials, Elmsford, N.Y.	15	16	-6.3	10	10	2	2	22,500	45,000	6,000	57	60	1	BMA

*MCH estimate
 †Includes one window and door store.
 Buying group designations:
 A = All-Pro; ABS = Allied Building Stores; BMA = Builder Marts of America; BW = Builders World; C = Co-op; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nation; ENAP = Employee Needs & Profit; H-HW = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen Merchandising Corp.; NSDA = National Supply Distributors Association; P = Pecklers; PAL = Progressive Allied Lumberman; PRS = Philadelphia Reserve Supply; SS = ServiStar.
 MCHN chart

RETAIL SCOREBOARD

Rank	Company	Sales			% Change		% DIY		Stores		Sq. Ft.		Status		Employees		% of Employees part-time	Buying/ mktg group
		1991	1990	1991	1991	1990	1991	1990	1991	1990	1991	1991	1990	1991	1990	1991		
231	Western Lumber, National City, Calif.	15	22	-31.8	10	10	5	4	6,800	34,000	8,000	286	270	15				
389	Gripps Lumber & Produce Co., Point Harbor, N.C.	15	15	0.0	10	10	3	3	7,800	20,000	1,900	40	40	0	HWI			
311	Naples Lumber & Supply, Naples, Fla.	15	18	-16.7	10	5	1	1	3,000	3,000	5,000	70	105	1	SS			
275	Wille Brothers Co., Alsip, Ill.	15	20	-25.0	5	10	2	2	3,500	7,800	6,000	20	20	0	HWI			
393	Yakle Lumber Yard Co., Palm Harbor, Fla.	15	15	0.0	5	5	1	1	2,600	2,600	6,500	60	35	0	SS			
425	N.B. Goodwyns & Son, Chesterfield, Va.	15	14	7.1	5	5	1	1	3,800	3,800	8,000	67	62	NA	HWI			
397	Serv-U Hardware Home Centers, Springfield, Mass. ²¹	14	14	0.0	90	75	8	9	42,800	120,000	25,000	200	NA	30	C			
427	Santa Barbara Home Improvement Centers, Santa Barbara, Calif.	14	13	7.7	85	85	1	1	50,000	50,000	25,000	63	63	2	Ace			
355	Chelsea Lumber, Chelsea, Mich.	14	15	-6.7	80	80	1	1	24,000	24,000	9,000	60	60	0	Ace, BMA, CBS			
404	Mendo Mill & Lumber Co., Ukiah, Calif.	14	14	0.0	70	56	4	4	15,000	60,000	18,000	110	131	5	Ace, BMA			
406	American Home & Hardware, Elkton, Md.	14	14	0.0	67	50	2	2	20,000	40,000	40,000	95	103	10SS				
400	Rugg Manufacturing Inc., Greenfield, Mass.	14	14	0.0	60	60	2	2	7,500	15,000	15,000	80	100	3	LMC, SS			
403	Marine Lumber, Nantucket, Mass.	14	14	0.0	60	60	1	1	50,000	50,000	50,000	85	85	4	Ace			
402	Jerry's Building Materials, Eugene, Ore.	14	14	0.0	60	60	1	1	60,000	60,000	30,000	150	70	50	Ace, BMA			
431	Anawalt Lumber & Materials Co., Picoima, Calif.	14	13	7.7	50	50	4	4	12,500	50,000	18,000	100	100	3	C			
461	Walker Builders Inc., Baileyton, Ala.	14	12	16.7	50	50	1	1	4,000	4,000	NA	50	60	0				
413	Rafael Lumber Co., San Rafael, Calif.	14	14	0.0	40	40	1	1	30,000	30,000	18,500	55	55	3Ace				
408	G.W. White & Son, Watertown, N.Y.	14	14	0.0	40	50	3	3	8,300	25,000	11,000	55	50	0	LMC			
423	Volco Inc., Jerome, Idaho	14	14	0.0	35	15	4	4	17,500	70,000	11,000	160	160	0	Ace, BMA			
344	Allensville Planning Mill, Allensville, Pa.	14	16	-12.5	35	35	4	4	8,500	34,000	18,000	160	190	3	C			
447	NFL Building Center, Daphne, Ala.	14	13	-7.7	35	25	3	3	10,800	30,000	12,000	100	100	0	Ace, BMA, SS			
412	John's Lumber & Hardware, Mt. Clemens, Mich.	14	14	0.0	35	40	2	2	7,800	14,000	10,000	75	50	3	BMA, C			
433	Friend Building Centers, Lowell, Mass.	14	13	7.7	35	50	2	2	10,500	21,000	18,000	90	58	5	Ace, BMA			
416	Preston Feather Building Center, Petoskey, Mich.	14	14	0.0	30	30	3	3	18,666	56,000	15,000	60	55	NA	PAL			
370	Jackson Lumber & Millwork, Lawrence, Mass.	14	15	-6.7	30	35	1	1	18,000	18,000	10,120	85	85	0	Ace, LMC			
446	Graber Post Buildings, Montgomery, Ind.	14	13	7.7	30	25	1	1	3,400	3,400	3,000	80	85	NA				
303	Narrowsburg Lumber Co., Narrowsburg, N.Y.	14	18	-22.2	30	30	4	4	3,000	12,000	15,000	63	70	1	Acc			
417	Geiger Lumber & Supply Co., Tallman, N.Y.	14	14	0.0	30	26	1	1	15,000	15,000	60,000	45	40	0	ENAP, SS			
378	Reistertown Lumber, Reistertown, Md.	14	15	-6.7	25	20	1	1	5,000	5,000	NA	75	70	3	CBS, ENAP, SS			
263	Imperial Valley Lumber Co., San Dimas, Calif.	14	20	-30.0	25	25	5	5	2,400	12,000	5,000	90	70	10	C			
379	SBS Building & Home Center, Marysville, Calif.	14	15	-6.7	25	20	2	2	10,500	21,000	15,000	68	80	0	Ace, BMA			
443	Snohomish Building Center, Snohomish, Wash.	14	13	7.7	25	25	2	2	5,800	10,000	18,000	52	52	3	Ace			
418	GBS Lumber, Mauldin, S.C.	14	14	0.0	25	25	3	3	6,700	20,000	7,000	65	65	0	HWI, LMC			
371	Oldham Lumber Co., Dallas	14	15	-6.7	20	35	1	1	10,800	10,800	3,000	35	25	0	SS			
392	Tindell's Inc., Knoxville, Tenn.	14	15	-6.7	20	10	3	3	5,000	15,000	3,000	60	90	0	HWI, IBSA			
330	Southampton Lumber Co., Southampton, N.Y.	14	17	-17.6	20	20	3	5	8,300	25,000	10,000	70	70	3	C, LMC			
472	Standard Builders Supply, Salt Lake City	14	12	16.7	20	20	1	1	3,000	3,000	4,200	40	40	3	C			
449	Arcadia Lumber Co., Arcadia, Calif.	14	13	7.7	15	20	2	2	5,000	10,000	30,000	50	NA	5				
420	McGinnis Lumber Co., Plant City, Fla.	14	14	0.0	10	20	1	1	7,000	7,000	12,000	66	73	1	BMA, LMC, SS			
450	Randall Brothers Inc., Atlanta	14	13	7.7	10	20	1	1	3,500	3,500	8,000	100	85	0	LMC			
387	Belair Road Supply Co., Baltimore	14	15	-6.7	10	10	2	3	6,000	12,000	15,000	47	46	0	BMA, C			
452	Kaper's Building Materials, Demotte, Ind.	14	13	7.7	10	10	1	1	6,000	6,000	70,000	42	36	0	LMC			
424	Burton Lumber & Hardware, Salt Lake City	14	14	0.0	10	10	2	2	7,000	14,000	2,000	54	45	0	Ace			
482	R.L. Sweet Lumber Co., Olathe, Kan.	14	12	16.7	10	10	2	2	3,000	6,000	3,500	100	100	3				
453	Banner Lumber Co., Detroit	14	13	7.7	10	10	1	1	2,500	2,500	8,500	40	40	2	SS			
353	Essen Hardware & Lumber, St. Louis	13	15	-13.3	90	90	9	9	16,700	150,000	10,000	155	155	15	HWI			
428	Handyman Home Centers, Fairborn, Ohio	13	13	0.0	90	85	9	8	15,000	135,000	9,000	180	120	33	Ace			
486	Kabelin Hardware Co., La Porte, Ind.	13	11	18.2	80	90	3	3	40,000	120,000	6,000	180	180	0	C			
489	Delta Home Center, Escanaba, Mich.	13	11	18.2	75	75	4	3	25,000	100,000	25,000	180	140	4	HWI			
429	The Corning Building Co., Corning, N.Y.	13	13	0.0	65	80	1	1	42,500	42,500	26,000	100	80	10	C, LMC			
430	Stone's Inc., Bainbridge, Ga.	13	13	0.0	60	60	8	8	7,500	56,000	10,000	100	100	3	DA			
432	Len-Co Lumber Corp., Buffalo, N.Y.*	13	13	0.0	50	50	1	1	27,000	27,000	40,000	70	80	0				
492	Marriner Lumber Home Center, Brunswick, Maine	13	11	18.2	50	50	3	3	6,700	20,000	15,000	50	50	4				
495	Porter's Building Center, Kearny, Mo.	13	11	18.2	40	40	5	5	10,000	50,000	20,000	100	75	20	HWI			
414	H.G. Page & Sons, Roughkeepsie, N.Y.	13	14	-7.1	40	35	1	1	25,000	25,000	35,800	75	80	10	Ace, SS			

²¹ Estimate
 * Includes three automotive stores and two paint stores.
 Buying group designations:
 ABS - Allied Building Stores; BMA - Builder Marts of America; BW - Builders World; C - Cotter; CBS - Central Builders Supply; CR - Co-op Reserve; DA - Distribution America; EN - Eagle Nation; ENAP - Eastern National; HWI - Handy Hardware Wholesale; HWI - Hardware Wholesale Inc.; IBSA - Independent Builders Supply Association; LMC - Lumbermen Merchandising Corp.; NSDA - National Supply Distributors Association; P - Peddlers; PAL - Progressive Allied Lumbermen; PRS - Philadelphia Reserve Supply; SS - ServStar.
 *NCHC chart

RETAIL SCOREBOARD

Rank	Company	Sales			% DIY	Stores		Sq. Ft.			Employees	% of Employees part-time	Buying/mktg group		
		1991 (\$ mil.)	1990	% Change 1990-1991		1991	1990	Store avg. 1991	Chain total 1991	Store avg. 1991					
493	C.H. Carpenter Lumber Co., Minneapolis	13	11	18.2	40	40	7	7	10,000	70,000	20,000	70	NA	0	
436	Spencer Lumber Co., Auburn, Ala.	13	13	0.0	40	40	2	2	2,375	4,500	1,000	50	50	15	SS
437	Maki Corp., Lunenburg, Mass.	13	13	0.0	40	40	2	2	25,000	50,000	1,800	60	55	10	BMA, SS
466	Phillips Building Supply Inc., Gulfport, Miss.	13	12	8.3	40	40	4	4	10,000	40,000	13,000	50	50	3	ABS, HWI
441	Forestville Lumber, Plainville, Conn.	13	13	0.0	30	30	1	1	25,000	25,000	NA	15	13	0	
460	Brookside Lumber & Supply, Bethel Park, Pa.	13	12	8.3	30	50	1	1	10,000	10,000	12,500	70	70	0	Ace, BMA, CBS, LMC
469	U.L. Harman Inc., Maryland, Del.	13	12	8.3	30	30	3	3	6,880	20,000	4,000	66	68	5	SS
448	Harbin Lumber Co., Laveria, Ga.	13	13	0.0	25	25	6	6	12,000	50,000	2,000	70	75	0	HWI
474	Aura Hardwood Lumber, San Jose, Calif.	13	12	8.3	25	20	4	4	7,500	30,000	2,500	40	42	0	
444	Croslin Supply Co., Eagleville, Tenn.	13	13	0.0	25	25	3	3	NA	NA	NA	60	60	NA	BMA, HWI, LMC
476	Chase Lumber & Fuel Co., Sun Prairie, Wis.	13	12	8.3	25	20	4	4	4,750	19,000	12,000	48	40	13	Ace, BMA
477	Glaeser Lumber Co., Vernon, Mich.	13	12	8.3	20	20	3	2	6,700	20,000	6,000	35	35	3	BMA, SS
471	Atlas Builders Supply Co., Los Angeles	13	12	8.3	20	20	1	1	5,800	5,000	8,000	25	25	2	
386	Hatch & Bailey Co., S. Norwalk, Conn.	13	15	-13.3	15	10	2	2	2,250	4,500	6,000	54	80	3	BMA
422	Adams Building Materials, Winter Haven, Fla.	13	14	-7.1	15	15	3	3	6,700	20,000	15,000	100	120	0	C, LMC
394	Fort Myers Lumber & Supply, Fort Myers, Fla.	13	15	-13.3	5	5	1	1	10,000	10,000	2,000	100	115	0	
454	Coleman's Hamilton Supply Co., Trenton, N.J.	13	13	0.0	5	5	2	2	2,500	5,500	14,000	53	55	11	C
500	Self Serve Lumber, Saginaw, Mich.	12	10	20.0	100	100	12	11	15,000	180,000	12,000	110	105	50	SS
455	The Big Four Lumber Co., Cleveland	12	12	0.0	85	85	2	2	20,000	40,000	26,000	100	100	0	Ace
456	L. Wernick & Sons Supply, Freeville, N.Y.	12	12	0.0	70	80	2	2	45,000	90,000	NA	14	12	0	
399	Mass Hardware & Supply, Waltham, Mass.	12	14	-14.3	65	65	2	2	28,000	56,000	22,000	90	90	20	SS
457	Archer Building Center, Oneonta, N.Y.	12	12	0.0	65	65	5	5	8,800	44,000	7,500	65	65	15	HWI, LMC
458	Tum-A-Lum Lumber Co., Walla Walla, Wash.	12	12	0.0	60	60	10	10	10,000	100,000	20,000	78	78	2	HWI
487	Bob's Ace Hardware, Rockford, Ill.	12	11	9.1	60	80	1	1	60,000	60,000	25,000	120	150	50	Ace
462	Henson Timber Products Corp., Forest City, N.C.	12	12	0.0	50	50	4	4	6,800	24,000	NA	75	75	NA	IBSA
436A	Ranagan & Nist, Wheeling, W.V.	12	15	-20.0	50	50	3	4	5,000	15,000	5,000	74	92	10	
463	Weisman Lumber Co., Rockaway Beach, N.Y.	12	12	0.0	50	50	2	2	5,000	10,000	10,000	66	66	NA	
399	Dooley's Hardware Mart, Long Beach, Calif.	12	18	-33.3	50	50	1	1	150,000	130,000	10,000	80	170	30	C
490	Niehues Lumber Co., Vincennes, Ind.	12	11	9.1	50	60	1	1	13,500	13,500	20,000	70	60	0	HWI
491	Collins Pine Co., Portland, Ore.	12	11	9.1	50	50	3	3	NA	NA	15,000	650	580	1	BMA
410	Landreth Lumber Co., Bunker Hill, Ill.	12	14	-14.3	50	45	6	6	9,500	57,000	18,000	95	95	20	BMA, HWI
464	Shore Lumber & Building Materials, Stanton, Del.	12	12	0.0	50	45	1	1	13,400	13,400	10,000	51	53	0	BMA, PRS, SS
405	Hamshaw Lumber, Keene, N.H.	12	14	-14.3	45	50	2	2	18,000	36,000	16,000	56	42	20	Ace
465	Asker's Inc., New Bern, N.C.	12	12	0.0	40	40	2	2	20,000	40,000	NA	75	75	2	Ace
494	Tri-County Building Center, Cedarville, Mich.	12	11	9.1	40	40	5	5	2,500	12,500	10,000	75	75	4	PAL, SS
436	Foreman's Inc., Elizabeth City, N.C.	12	13	-7.7	40	40	4	4	8,000	32,000	5,000	39	47	13	BMA, SS
366	Terminal Builders Marts, Gadsden, Ala.	12	15	-20.0	40	40	2	2	30,000	60,000	13,500	50	50	33	BMA, HWI
459	Davis Lumber Co., Texarkana, Ark.	12	12	0.0	35	60	4	5	10,000	40,000	20,000	85	70	0	ABS
372	Somerville Lumber Co., Bridgewater, N.J.	12	15	-20.0	30	30	1	1	8,000	8,000	15,000	50	58	0	BMA, SS
467	Tart Lumber Co., Sterling, Va.	12	12	0.0	30	30	1	1	7,800	7,000	8,000	50	50	0	BMA, SS
345	Brook Contractors Supply Co., Holbrook, Mass.	12	16	-25.0	30	30	1	1	1,700	1,700	1,000	30	30	0	
302	Bakersfield Lumber Co., Bakersfield, Calif.	12	18	-33.3	30	33	1	1	50,000	50,000	30,000	100	100	30	HWI
470	Lampe Lumber, Tulare, Calif.	12	12	0.0	30	30	3	3	4,000	12,000	14,500	100	100	4	C
468	Homan Lumber Mart, Elkhart, Ind.	12	12	0.0	30	30	2	2	11,800	22,000	18,000	60	65	30	BMA, CBS, HWI
480	Brunell Lumber & Millwork, Madison, Wis.	12	12	0.0	25	15	2	2	NA	NA	5,000	64	64	1	CBS
496	Abilene Lumber Inc., Abilene, Texas	12	11	9.1	25	30	1	1	15,000	15,000	20,000	63	58	2	ABS, Ace
445	Rim Forest Lumber Co., Rimforest, Calif.	12	13	-7.7	25	25	1	1	3,000	3,000	18,500	40	40	2	Ace
449	J.S. Hayes Building Supplies, Gainsville, Va.	12	16	-25.0	25	25	1	1	8,000	8,000	15,000	32	32	0	SS
475	Tynan Lumber, Salinas, Calif.	12	12	0.0	20	20	4	4	2,000	8,000	3,000	52	52	3	C
473	Denlinger Inc., Paradise, Pa.*	12	12	0.0	20	20	1	1	8,000	8,000	15,800	200	200	NA	
497	S.S. Smith Lumber Co., Belton, S.C.	12	11	9.1	20	20	1	1	8,000	8,000	3,500	20	20	0	IBSA
451	City Builders Supply, Worcester, Mass.*	12	16	-25.0	20	20	1	1	NA	NA	NA	20	20	0	
451	Taylor Brothers, Lynchburg, Va.	12	13	-7.7	18	16	1	1	12,580	12,500	2,000	72	90	1	BMA, HWI
309	Wallich Lumber, Detroit	12	18	-33.3	15	11	1	1	10,000	10,000	10,000	60	75	1	C
479	Christmas Lumber Co., Harriman, Tenn.	12	12	0.0	15	15	2	2	9,000	18,000	10,000	40	35	0	BMA, LMC

*Co-op designations:
 ABS = Allied Building Stores; BMA = Builder Marts of America; BW = Builders World; C = Cotter; CBS = Central Builders Supply; CH = Co-op Reserve; DA = Distribution America; EN = Eagle Nation; ENAP = Needs a Profit; HW = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen Merchandising Corp.; NSDA = National Supply Distributors; P = Peddler; PAL = Progressive Allied Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServiStar.

RETAIL SCOREBOARD

Rank 1991	1990	Company	Sales			% Change		% D/Y		Stores		Sq. Ft.		Store avg. 1991	Chain total 1991	Store avg. 1991	Employees		% of Employees part-time 1991	Buying/ mktg. group 1991
			1991	1990	1991	1990	1991	1990	1991	1990	1991	1990	1991							
476	478	Southland Lumber & Supply, Inglewood, Calif.	12	12	0.0	15	15	1	1	4,800	4,800	20,000	24	24	NA					
484	484	H.J. Granger & Sons Inc., Jacksonville, Fla.	12	12	0.0	10	10	1	1	30,000	30,000	10,000	100	100	0	HWI, LMC				
483	483	Johnson Lumber Co., Salisbury, Mass.	12	12	0.0	10	10	1	1	10,000	10,000	20,000	25	25	0	SS				
499	499	Asheboro Building Supply & Hardware, Asheboro, N.C.	12	11	9.1	10	10	2	2	10,000	20,000	15,000	50	50	5	BMA, HWI				
385	385	Grubb Lumber, Wilmington, Del.	12	15	-20.0	10	10	1	1	10,000	10,000	8,000	36	36	0	BMA				
		Pegram West Inc., Greensboro, N.C.	12	12	0.0	10	10	1	1	4,000	4,000	2,500	45	44	NA	BMA, DA				
		McMichael Lumber, Pompano Beach, Fla.	12	12	0.0	5	5	1	1	12,000	12,000	12,000	27	20	1	C				
Top 10 Totals and Averages			19,011	16,575	14.5*	76	79	1,661	1,601	64,100	9,105,514*	28,600	123,068	108,700	25					
Top 25 Totals and Averages			25,400	22,935	10.7*	75.4	76.6	2,811	2,795	44,548	4,848,205*	24,400	171,586	157,450	28					
Top 50 Totals and Averages			28,917	26,622	8.6*	60.8	61.2	3,610	3,639	32,293	2,702,146*	21,650	195,644	182,854	21					
Top 100 Totals and Averages			31,882	29,731	7.2*	53.6	53.1	4,136	4,168	27,040	1,464,621*	18,449	212,499	197,685	15					
Top 200 Totals and Averages			34,997	32,781	6.8*	46.0	46.3	4,710	4,734	22,942	766,317*	17,031	229,968	214,544	11					
Top 300 Totals and Averages			37,045	34,865	6.3*	41.6	42.0	5,125	5,147	21,214	535,039*	16,199	240,781	225,095	9					
Top 400 Totals and Averages			38,629	36,478	5.9*	40.0	40.2	5,464	5,486	20,429	412,264*	15,342	249,961	233,279	8					
Top 500 Totals and Averages			39,916	37,805	5.6*	38.8	39.2	5,725	5,748	19,098	337,388*	15,017	257,655	240,811	8					
Total U.S. Home Center/ Building Materials Sales**			67,150	66,765	0.1															
Total U.S. Hardware Store Sales**			13,087	13,301	-1.6															
Total U.S. Home Improvement Sales**			80,237	80,066	0.2															

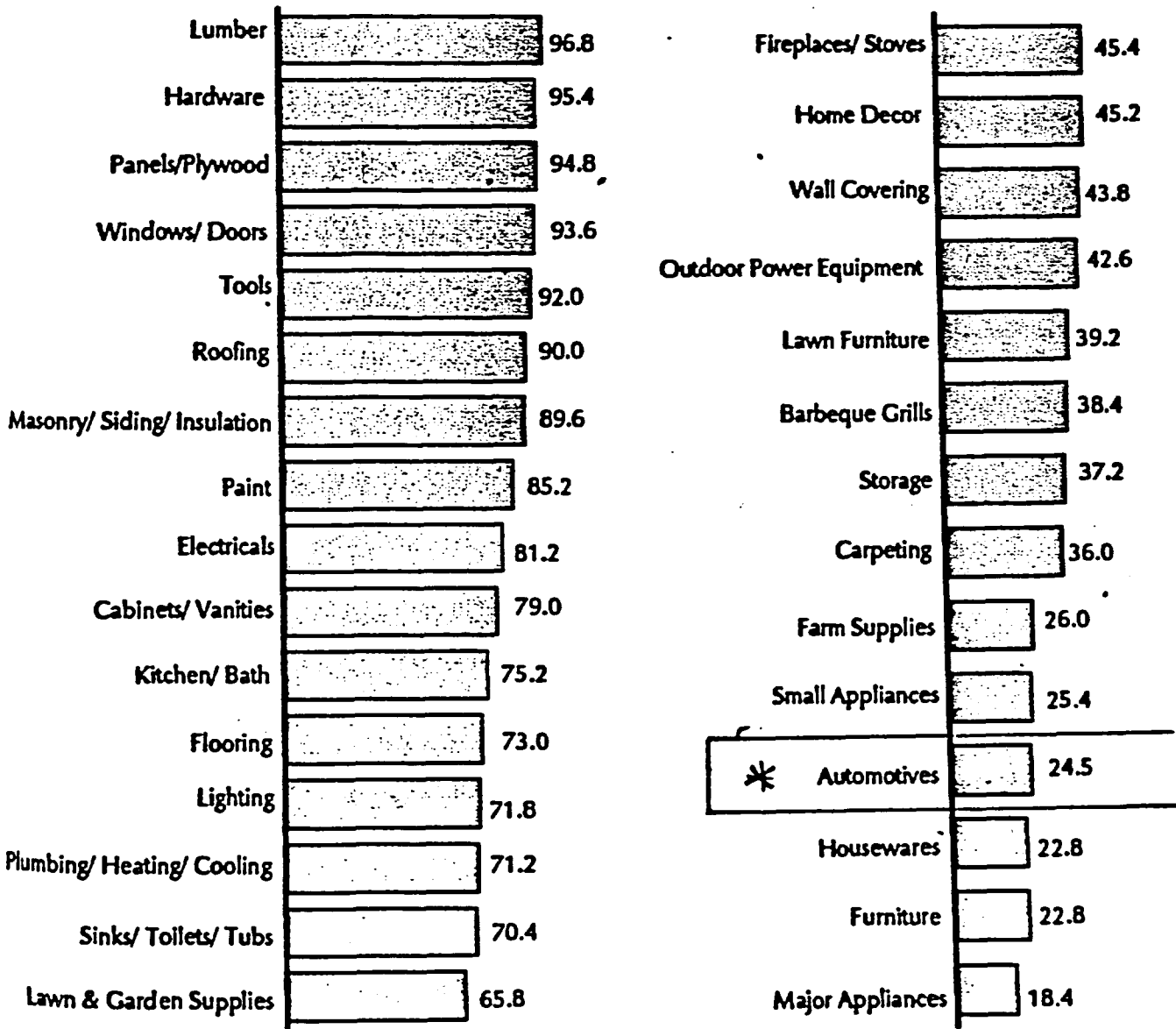
NWCI estimate
 Source: U.S. Department of Commerce
 Chain total represents the average for each segment
 *Percentage change represents the difference, from year to year, of aggregate dollar sales in each sector. When the actual percentage changes for each company are tabulated and compared, a very different picture of the industry's performance emerges: Top 10: 11.1 percent; Top 25: 5.8 percent; Top 50: 2.2 percent; Top 100: -0.4 percent; Top 200: 1.7 percent; Top 300: 0.9 percent; Top 400: 0.7 percent; Top 500: 0.3 percent.
 **Group designations:
 A = Allied Building Stores; BMA = Builder Marts of America; BW = Builders World; C = Cotter; CBS = Central Builders Supply; CR = Co-op Reserve; DA = Distribution America; EN = Eagle Nation; ENAP = Ensign Needs a Profit; HWI = Handy Hardware Wholesalers; HWI = Hardware Wholesalers Inc.; IBSA = Independent Builders Supply Association; LMC = Lumbermen Merchandising Corp.; NSDA = National Supply Distributors Association; P = Peddlers; PAL = Progressive Allied Lumbermen; PRS = Philadelphia Reserve Supply; SS = ServStar.
 NWCI chart

Alphabetical Listing of the Industry Top 500

Company, Rank & President	Company, Rank & President	Company, Rank & President	Company, Rank & President	Company, Rank & President
Alpine Lumber Inc. 486 Roy White	Asheboro Building Supply 499 Bruce Ayres	Bellevue Builders Supply 90 Joseph Lucarelli	Boland Maloney Lumber Co. 290 Richard Boland	Buildway Inc. 62 Newell LaVoy
ABC Inc. 52 Peter Noseworthy	Askew's Inc. 474 Milton H. Askew Jr.	Bender Lumber 171 Paul Bender	Borgsars Supply 229 Roger Borgsars	Building Material Supply Co. 234 Robert Chambers
Adams Building Materials 455 Bog Adams	Atlas Builders Supply Co. 453 Tom Wang	Bering Home Center Inc. 335 Norman J. Bering II	Broadway Lumber Co. 264 Richard Spodek	Burton Lumber & Hardware 428 Robert Burton
Airco Lumber 120 Bernal Puckett	Aura Hardwood Lumber 449 Kellen Aura	Beronio Lumber Co. 304 Michael V. Casassa	Brook Contractors Supply Co. 481 Rosalie Carturo	Busy Beaver 107 Charles Bender
Alford R. Lavalley Lumber 258 Michael Rivard	A.C. Houston Lumber 58 Robert A. Houston	Better Living Inc. 296 Richard Nunley	Brookhart Inc. 109 Tom Watt	Butz Building Centers 274 Michael Cary
Alexander Lumber 45 Richard Alexander	A.D. Moyer Lumber & Hardware 340 Scott Moyer	Big C Lumber 224 Roger Foley	Brookside Lumber & Supply 446 Bruce Edwards	Calcasieu Lumber 137 T.N. Morris Jr.
All American Home Center 145 Edward Genter	A.H. Angerstein 298 Bruce Greene	Big Creek Lumber 225 Homer McCrary	Brosius-Eikason Co. 292 James T. Eikason III	California Shingle and Shake Co. 188 Leo Brutsche
Allyn Lumber Co. 314 Bobby Allen	A.J. Smith Co. 249 Gibert Smith	Big I Corp. 239 Kenneth Lehman	Brown-Graves Co. 78 Harold E. Graves Jr.	Cape Fear Supply 302 J.H. Hollnshed
Anderson Planning Mill 405 Paul J. Westover	A.L. Kigo Co Inc. 283 A.L. Kigo	Big Tin Barn 103 Clifford Grum	Brunsell Lumber & Millwork 485 Ronald Kneebone	Carolina Builders 29 Fenton Hord
Anderson Trades Inc. 331 Charles Goldberg	Babbitt Brothers 132 W. David Chambers	Bison Building Materials 95 Pat Bierschwale	Buchheit Inc. 219 Kenny Buchheit	Carter-Jones Lumber 26 Bryan Carter
Anderson Lumber 325 C.D. Dray	Bagnal Builders Supply 330 T.N. Bagnal Sr.	Black Lumber 372 William Carmichael	Buena Park Lumber & Hardware 350 John Nelson	Causeway Lumber 105 Scott Whiddon
Anderson Home & Hardware 396 Henry Hammond	Bakersfield Lumber Co. 482 Ted Maidment	Black & Co. 210 J.S. Black	Builders Discount 60 Shlomo Lehari	Cedarburg Lumber Co. 206 William Wernicke Jr.
Anderson Lumber & Materials Co. 400 Henry Arzwait	Banner Lumber Co. 430 Isadore Epstein	Blackstone Co. 74 William Schwartz	Builders Emporium 12 James McKittrick	Central Hardware 21 James Cohen
Anderson Lumber 41 Charles Beardall	Barr Lumber 65 Murl Fast	Biffert Lumber & Home Center 376 Thomas Biffert	Builders Express 148 Jud Walford	Central Michigan Lumber 84 Steve Lawrence
Anderson Lumber Co. 423 Charles Crosby	Barrons Gaithersburg Lumber 347 Charles Davis	Bloodom Lumber Co. 172 R.B. Fancher	Builders General Supply 144 T.J. Shaheen	Central Valley Builders Supply 123 Robert Paterson Jr.
Anderson Building Center 462 Paul Archer	Bartlett Enterprises Inc. 357 Tom Bartlett	BMC West 28 Donald Hendrickson	Builders Square 4 Glen Melton	Century Supply Co. 134 Paul Spiewak
Anderson Lumber Co. 316 Richard P. Arnold Jr.	Belair Road Supply Co. 426 T.R. Adams Jr.	Bob's Ace Hardware 464 R.W. Westlund	Builders Supply 104 Robert Wellendorf	

(Continued on page 88)

Which Stores Carry the Top 30 Products? (% of the top 500 retailers)



NHCN research and charts

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Interview w/Auto Palace Store Manager - Kenny

- Business has been great the past 6 months.
- With new car sales down in this economy, consumers are doing the repairs themselves.
- Over 90% of our customers are to DIY.
- 60-70% of our business (total sales) are retail stocked items, 30-40% back room parts.
- Try to carry 2-3 brands in most categories
- Chemicals sell well here. We know Discounters sell chemicals at low prices, but we have equally low prices & a bigger selection (breadth & depth).
- Nothing purchased independently for that stores needs; it all goes through a central D.C.
- Our customer: Parts (90-95% Male)
Chemicals & other (60-70% Male)
- We like to use manufacturers' displays.
- We rotate our end caps every month or two.
- We have 2 people working the service desk, 1 person on checkout (2-3 on weekends), 2 managers on site, 1-2 floor assistance clerks.
- Our building is about 20,000 square feet.

Interview with Dick Cohen, - Hard Parts Buyer, Automotive Supply Assoc., - Concord, NH

Automotive Supply Assoc. Inc. (SAS Auto Parts Co.) focuses on Independent and Chain Installers. Only 25% of sales go to the Do-It-Yourself-er. SAS is more focused on hard parts to match their customer base. They are weak in accessories, and don't like the category. Forget Chemicals.

The New England Market is in a down turn, and there aren't any 'hot' categories. The fastest moving categories are brakes and exhaust.

They currently carry 3-4 lines of Canadian products. Country of origin is not an issue.

There are a lot of manufacturers in this market competing for the business. SAS is very satisfied with their present relationships, and would find it hard to make a change. The store people find it very hard to make a change, especially when their customers are familiar with a product line.

Reps vs. Direct

Reps are better if there are any communication problems, and to insure adequate account service.

The new vendor information package preferred by SAS is:

Product Catalog

Price List

COOP allowances (standard is 1/2 to 1 1/4% on net purchases, with special deals and other funds thrown in)

Samples of the product to review

Terms and Conditions

Shipments are made direct to Distribution Center. All store orders are processed from the DC.

Buyer Interview with Al Deane, Midas Muffler Franchisee, Maine

Al spent 21 years working for Volkswagen of America and 10 years as a parts buyer for Subaru. He volunteered information for the Midas Franchise as well as dealer service centers.

In general the current economic downturn in the last 2-3 years has affected the muffler business negatively since it is a project that can be done by consumers to save money. Their other businesses, primarily brakes, are unaffected because of safety, complexity and disposal concerns. ABS brakes systems are hard to work with and require the use of a torch, and in many cases drums and rotors need machining.

Midas franchisees are experiencing increasing competition from smaller specialty shops, and have begun a refocus to complete under car care including: axles, joints, shocks, oil change, lube, brakes, alignment, etc. Midas franchises are in serious competition with nearby specialty shops, and are only interested in suppliers that provide top quality products, deliver in 2 weeks or less, and that don't sell the same products to their direct competitors. One promotion the "Oil Change Club" encourages customers to join an oil change club and put a Midas Oil Change sticker on their rear bumper for a \$4.00 discount on every oil change.

Replacement parts are purchased primarily and exclusively from the Midas franchise. The brake shoes and mufflers (lifetime guaranteed) must be purchased from Midas. All other parts and liquids, including pipes, fluids, master cylinders, etc., can be purchased from other sources. In general, Midas products are of high quality and any products that are sourced elsewhere need to be of equal or better quality with a price advantage. An example that was given was exhaust pipes: poorer quality exhaust pipes rust out faster and leave a poor impression with the customer, and Midas exhaust pipes now come with an aluminum coating that greatly increases operating life.

Other reasons for purchasing parts outside of the Midas franchise is part availability. If the job needs to be done and none of the networked franchisees has it in stock, the store will source it from a Jobber such as NAPA.

While working for Subaru, "Y" exhaust pipes were sourced from a Canadian company. Only problem with relationship was the delivery time, 3 weeks. With a 3 week delivery lead time, they had to stock 3 weeks worth of inventory and tie up valuable storage space and capital. Franchisees presently order weekly by Modem to the warehouse. Orders need to be delivered within 2 weeks. In addition, Midas offers 1.5% of total purchases toward obsolescence which helps offset losses.

Waste Removal

Old oils of all kinds are presently pumped out for free by reseller who sells for profit to oil burning heaters with stage III furnaces (clean burning). Value for everyone. Mufflers and brakes are taken away by recycler who saves metal from rotors and drums and grinds up all mufflers and other components for recycling.

Changes in Product Configurations

In 1953 a Midas franchisee discovered pipe bending, and greatly reduced the need to stock pre-bent pipe. Now since unitized construction, the tolerances are too tight to prebend straight pipe to fit. The result is a large amount of inventory per store. Try to spread inventory around all networked stores and balance and share inventories. Inventory levels of pre-bent pipe is approximately \$40,000 per shop location.

Effect of Discounters and Clubs

Only real impact is on mufflers, and there they stick to the 80:20 rule (20% of the products do 80% of total business) and don't stock a full selection of sizes. Midas pricing is very competitive, and Franchisees can get parts in for 1/2 what it costs them to go through a discounter.

Opportunity for New Suppliers

Best way to reach franchisees is through direct mail with a highly interesting piece that attracts attention among the clutter of mail. The most logical product would be in pipes, if there was a price and quality advantage. The four key areas to address are: Fill Rate, Lead Time, Product Quality, and Price. If attempting to get Midas business, stay away from competition, gear a brochure directly to Midas dealers, exclusivity is important.

Subaru Relevant Information

Subaru OEM parts were very expensive in comparison to the Auto Aftermarket pricing. Subaru dealers bought from Subaru Distributors, and based on the higher prices, some Distributors sourced their own products directly to compete with Subaru OEM parts. A fairly large percentage of parts were sourced outside the Subaru OEM system. Headquarters would pull some of the parts and inspect for acceptable levels of quality. Two roads into the Dealers would be direct, or through the Distributors.

General

It takes a lot of information for an Aftermarket manufacturer to be successful. You need to know the industry to determine which parts to make, what quantities, what the OEM pricing is and what you have to sell at, and determine if you can sell at that price. Most successful Aftermarket manufacturers are either from the industry or have inside people helping them with critical information.

Roy Auto Parts Co. (2 stores)

Willimantic, CT

Jobber Retailer, 50% DIY

Bud McCallum - Owner, General Buyer

- Purchases from Warehouse Distributor: buys what's available, foreign or domestic (usually imported goods for imported cars, domestic goods for U.S. autos)
- There is a movement to lower margins. Sees Wal-Mart as a significant competitor.
- Although purchases on an as-needed basis (Warehouse has 1-2 day lead time only) from Distributor, he does like visits from manufacturer's (factory) reps. They are more knowledgeable about their products than Warehouse sales force or Rep firms. The factory reps come only infrequently, however.

Hot Products/Categories in '92

1. Accessories for 4WD vehicles : Rocker panels, roof racks, tire carriers
2. Spoilers
3. Replacement Convertible Tops
4. Sunroofs
5. Running Boards
6. Leather interiors
7. Graphics
8. Roof racks

Hottest Markets in '92

1. Utility Vehicles
2. Japanese Imports
3. Cadillac El Dorado & Seville

Central Auto Parts (3 stores)

Skowhegan, ME

Jobber Retailer

Dale Watson - GM, General Buyer

- Business in general is increasing. Exhaust Systems sell well. Spark Plugs/Points/Carburetors being phased out by technological change.
- Sells Imported/Domestic products interchangeably. He does not notice any differences in cost, packaging, or quality
- Retailer margins high in new chemicals until picked up by Discount Stores (Wal-Mart, etc.). Oil, routine chemicals (antifreeze, windshield washer fluid, etc.) all very low margin as discounted widely. General trend to lower margins, increase turns.
- Seasonality - Antifreeze and Windshield Washer Fluid are ordered and sold to Retailers starting in August for winter season. He sees little seasonality in general, as more cars have air conditioners and battery replacement is not only a winter experience.
- He is doing well selling car care products to Reconditioning Shops (has a truck just for this end of the business). Has to be careful about extending credit to these shops as they are often low investment, short-lived enterprises.
- He likes Reps that show product and pricing and tell him who else is buying the product. "Who's competing?" He will buy non-competing products.

Imported Car Parts

Pine Meadow, CT

Warehouse Distributor

Robert Smith - Owner, General Buyer

- Deals only in Foreign Car Goods. Carries very few parts made in U.S. or Canada. Purchases from direct Importers. Choices are primarily price-driven, quality is generally fine (not a problem). Exporters include: Israel, India, European Common Market, South America
- He sees little seasonal variation, but does need a couple of month's lead time for "winter stuff".
- He notes that the U.S. is a Coast to Coast market with Coast to Coast Distributors.
- There is increasing emphasis on low inventory/quick restocking.
- Unlike 10-15 years ago, most goods are not aggressively marketed. Mostly chemical (the "glamour stuff") reps come to call.
- He feels he's in a pretty stable, even static, market niche of European cars.

McCallum Motor Supply Co.

Unionville, CT

Warehouse Distributor

Richard Templeton - Mgr. Purchasing, General Buyer

- Growth Categories: Brakes, Exhaust Systems (aftermarket exhausts of thinner metal than OE, therefore need more frequent replacement)
- Shrinking Category: Carburetors (becoming passé)
- He only carries products manufactured domestically (wants to simplify sourcing and reduce # of SKUs carried).
- Seasonality no longer significant. Example: Heater/Air Conditioner systems now integrated.
- Although they place all orders directly with manufacturers, they are called on by Rep firms. The good ones come regularly, checks that catalogs and price lists are up-to-date, Warranties are being processed and present info about new programs. The poorer Reps would gladly be exchanged for a 5% discount on orders.

Buyer Survey
Coop Advertising

- Usually 5% of sales (coop allowance)
- New coop rules are based on packages vs. % of sales.
- With large accounts, the figure is negotiated up-front.
- Automotive Marketing Survey:
 - 60% suppliers give coop \$ over that earned.
 - 27% suppliers sometimes give coop without any proof of performance.
 - 43% suppliers sometimes give coop up-front.
 - 46% sometimes pay production costs.
- Trend: Coop as a % of sales to an up-front Promotional Allowance. (No proof of performance)
- 8-10% of sales for large retailers & wholesalers is very common.

Parts Proliferation example:	Air Filters	1980	95% coverage = 56 part numbers
		1991	95% coverage = 140 part numbers
		1995E	95% coverage = 185 part numbers

Problems Caused by Parts Proliferation (Hurdles that Canadian Co.s must overcome in sell-in)

1. Reduce the no. of suppliers, especially those with small lines
2. Need better margins
3. Drains cash flow by carrying high inventories
4. Inventory Management nightmare
5. Reduces productivity
6. Adds cost

Largest single cause of parts proliferation is import parts.

Rep. Film
Interviews

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Rep Firm Interviews

1. David Nager & Associates: David Nager (18 employees)

- There are Rep firms who only call on WDs, Program Jobbers, Hard Parts Retailers.
- David's firm calls on these plus Account chains, Mass Merchants, Dept. stores & others.
- There are 9 Buying Groups (Program Jobbers): CarQuest, Bumper to Bumper, etc.
 - They still buy from a W.D.
- Hot categories: Cleaners, Chemicals, Waxes, Hard Parts (not all)
- Cold categories: Ignition, Spark Plugs, Wire Sets
- More products are Lifetime Guaranteed and last longer because better made. Impacts sales.
- Strong competitors: Cooper Industries, owner of Champion & Belden Wire, just bought Moog, working on Purolator; Allied (Bendix - Fram); Turtle Wax; Peak
- Sliding Competitors: Armor-All
- Rebuilds: a geographic location business
- Batteries: rule of thumb here, don't ship more than 600 miles or lose out w/high freight payments.
 - Exide & Delco have really cornered the U.S. market. Big players here, stay clear of.
- U.S. market: 10 times that of Canada across all categories
- Canadian products are high quality, usually more than is needed.
- Canadian companies must use good Rep firms, or dedicate a U.S. salesperson.
- Rep firms will sell product & help with information for Mktg. Plans. We do not develop Mktg. Plans.
- Too many Canadian companies don't have their Plans & Support materials altogether.
- Must turn to adapt to consumer & buyer wants. Don't force your product down their throats.
- Ways to succeed:
 - Good product; helps to have something unique/better
 - Competitive price
 - Good packaging. Most companies, Canadian & American, all weak here.
 - Deliver promptly, in full, as promised
 - Sample their product. Work w/the trade to get product tested.
 - Field support. Make sales calls w/Reps. Educate the Reps.
 - Good sell sheets & collateral. Looks professional, organized, & serious.
 - Understand the U.S. trade's tendencies toward credit, which means 90-120 day dating.
- Canadian firms should know roughly the sales of their category in the U.S. and in New England.
 - Run the numbers: X no. of stores x 2 brands x 6 products x Y turns/yr. = Sales
 - If this firm can capture 5-10% of this store or area's business, how big are the sales?
- Rep firm's avg. commission is 5%. Maybe 6-7-1/2% on chemicals, 3% elsewhere.
 - If a firm is only going to sell \$200M in N.E. x 5% = \$10M commission for one firm...we're not interested at this level.
 - \$25-50M in yr. 1 with the potential to double in 1-2 yrs., we're interested!
- These are smaller rep firms with fewer employees and they'll carry smaller companies and be happy with \$10M. But they'll need to carry 10 lines, and have 2-3 employees to survive.
- Rep relationships with key buyers is what companies are buying.
 - Find out what those relationships are and can they cash in and how quickly with this product line.
 - Don't plan to use Rep firms to get in and then drop the Rep firm in 2-3 yrs.
 - Firms will lose out down the road.
 - We have the trade relationship. If we lose the supplier, we'll pull the business at the account.

M & A Sales, Tonda Mullis - Principal

- New England Auto Aftermarket is small.
- In the past 3 years, it has grown smaller in terms of number of accounts/retailers.
- M & A calls on Auto Aftermarket Chains, Mass Merchants, Food/Drug, and a few jobbers.
- Hard Parts are handled (usually) by Reps who focus only on those products.
 - Two highly recommended Reps for Hard Parts were Steve Lapidus (New York H.Q.) and Archie & Billy Burke (Cleveland HQ).
 - Hard Parts are usually handled by focused Reps, who cover larger geographical areas.
 - There is no way a Rep can make calls on and service every jobber in their marketplace.
- In the N.E. market, there are only 5 large Auto Chains:
 1. Auto Palace (ADAP): By far and away, the largest (larger than the next 4 combined)
 2. VIP (in Vermont)
 3. Acme Auto (in Hartford, CT): 24 stores
 4. Lappers: 8-9 stores
 5. Amerling (in CT)
- Reps are constantly flooded with firms wanting them to carry their lines.
 - Reps look at Manufacturers and evaluate them on:
 - Their product line:
 - Is there a market for these products?
 - How big is it? How much of a share could this capture in 3 yrs.?
 - Does the supplier know why/how it's uniquely positioned against competitors?
 - Is it quality built? Is it priced right?
 - Is there breadth & depth to it?
 - Professionalism:
 - Quality and adequate catalogs, brochures, price lists
 - Good packaging & display materials
 - Sales Manager expertise, character, style
 - Company:
 - Seriousness of the territory and supporting the Rep firm
 - Financial strength. It takes financial support to grow a business.
 - In sum, overall appearance is critical to the buyer and consumer.
 - Small companies with great support materials can really go far.
- M & A works on commissions of 4-8%, depending on the category & company.
 - Marketplace commodity products are price competitive, but then a Rep's Buyer relationship can frequently get a me-too product placed. We'll get 5-6% commission here.
 - For high turning, unique, easy sell-in products, we'll take 4%, but usually not at first. Only after years of building the business, suppliers will drop a Rep commission and most Rep firms think long and hard about dropping firms that do these things.
- Hard Part's get 15-20% commission.
 - It's a harder sell-in, takes longer, quantities start small.
 - Once in, it's like an annuity, sales just stay constant.
- The Hard Parts business is turning more and more to professional service end-users.
 - Technology is getting too sophisticated for DIYers.
- Auto Palace just took about 20 feet of "Fashion" products and added Hard Parts.

Hot Categories:

1. Products that will help Accounts w/Service bays recycle oil & grease
2. Beaded seat cushions
3. Color waxes
4. 3-edge wiper blades
5. Idiot-proof security clubs

New England Reps

Advantage, Inc.

Jay Macleod
43 Madison Avenue
Madison, CT 06443
Phone: (203) 245-9498
Fax: (203) 245-9498

Jack Corbin Associates, Inc.

Jack Corbin
N. Main St.
PO Box 475
Wolfeboro, NH 03894
Phone: (603) 569-3007
Fax: (603) 569-6431

Grinold-O'Brien Sales, Inc.

John O'Brien
South Park, Route 1
PO Box 391
Walpole, MA 02081
Phone: (508) 668-7000
Fax: (508) 668-6123

Kelley Kent and Sullivan Sales Company

William H. Kent
1420 Providence Highway
Norwood, MA 02062
Phone: (617) 769-8899
Fax: (508) 769-0342

The Market Maker

Bernard N. Hanlon
245 Sea Street, Suite 44
Quincy, MA 02169
Phone: (617) 472-3740
Fax: (617) 472-2110

David Nager & Associates, Inc.

David Nager
210 Highland Avenue
Needham Heights, MA 02194
Phone: (617) 449-4640
Fax: (617) 455-8271

CMA & Associates, Inc.

Charles J Magee
Two Dundee Park
PO Box 606
Andover, MA 01810
Phone: (508) 475-3334
Fax: (508) 475-3374

Greenberg Associates

Paul Otis Greenberg
81 Dennison Avenue
Swampscott, MA 01907-1431
Phone: (617) 598-6295
Fax: (508) 599-1491

Steve Holtzman Associates, Inc.

Steve Holtzman
275 Turnpike Street
Canton, MA 02021
Phone: (617) 828-7700
Fax: (207) 828-3407

M & A Sales

Tonda Mullis
4 Pinefield Lane
Weston, CT 06883
Phone: (203) 226-7050
Fax: (203) 226-7118

McConaughey Associates

Mark McConaughey
150 Lavan Street, Suite 103
Warwick, RI 02888
Phone: (401) 461-8300
Fax: (401) 461-4250

New England Sales Associates, Inc.

Joseph Shuman
888 Washington Street, Suite 312
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Phone: (617) 329-1900
Fax: (617) 329-2061

New England Aftermarket Representatives

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33 Highland Avenue
Needham, MA 02194
Phone: (617) 449-3610
Fax: (617) 449-4016

Parri/Lee Associates

Richard C. Parri
240 Bradley Street
New Haven, CT 06510
Phone: (203) 624-7300
Fax: (203) 562-5472

Scully Associates

David E. Finigian
50 Main Street
P.O. Box 518
North Reading, MA 01864
Phone: (508) 664-6199
Fax: (508) 664-1363

Supre-Six Sales Company, Inc.

Bill Lynch
14 Bannister Street
Shrewsbury, MA 01545
Phone: (508) 842-2250
Fax: (508) 842-5982

J.C. Orlando & Associates

John C. Orlando
6 Crescent Drive
P.O. Box 8562
Salem, MA 01971
Phone: (508) 745-0989

Richards' Sales Associates

Richard Putterman
220 Reversoir Street, Suite 25
Needham, MA 02194
Phone: (617) 449-2722
Fax: (617) 449-2820

Cliff Smith & Associates, Inc.

Cliff Smith
211 Main Street
Marlboro, MA 01752
Phone: (508) 481-3800
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Allan Wilkening

David E. Finigian
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Cranston, RI 02910
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Store Audits

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Store Audits

I. Discount Chains

A. Bradlees - Framingham, MA

- 6 aisles, (18) 4 ft. gondolas per aisle, 432 running feet, over 2,500 sq. ft. of Auto products
- Auto Department located in the right side of store, a "destination" department
- Aisles, categories, segments, were not marked for easy purchase/location of product.
- Motor Oil: Castrol, Mobil, Sunoco, Havoline brands all carried.
 - Cases stacked on lower shelf, top case usually cut open for less than case purchase quantities
 - 72 running ft. (single shelf) of oil. Very space intensive
- Filters: Oil & Air. Brands: Fram & Purolator
 - 1-2 shelves, 32 running feet
 - Large reference books hanging from shelves to help self-service customers find the filter for their car/vehicle.
- Categories carried:
 - Oil change products: pans, cups, funnels, grease
 - Sealers
 - Fluids & cleaners (antifreeze, STP additives)
 - Wipers: Brands - Anco & Lifetime, both on manufacturer supplied displays
 - B & D Car Vacs
 - Interior Accessories
 - Air Fresheners
 - Wheel covers: Custom Accessories
 - Spark Plugs: Champion
 - Steering Wheel covers: Allison
 - Lighting: GE Bulbs & Lamps
 - Antennas: Robeck
 - Body Repair: Bondo
 - Paint Touch-Up: Duplicolor (Div. of Sherwin Williams)
 - Tools: Allied
 - Trailer Balls: Superior Industries
 - Car Mats (large area, displays needed)
 - Windshield Washer Chemicals
 - Seat Covers
 - Kid's Seats
 - 1 full aisle of Cleaning Supplies
 - Splashguards: Power Flo
 - Batteries: Delco
 - Wire: Calterm
 - Fuses: Littlefuse
 - Battery Cables: Carol Cable
 - Cleansers: Noco
 - Tie Downs: Keeper
 - Roof Racks: Groboski

- In sum: several categories require displays:
 - Car Mats
 - Wipers
 - Antennas
- Numerous categories carry only 1 Brand (e.g. Fuses, Lighting, Spark Plugs, Wheel Covers, Floor Mats, Tie Downs).
- Mass Merchants like name brands & low priced product for Casual/Light DIYer.
- Mass Merchants are the low priced source for Chemicals, Oils & other commodity products.

B. Caldor's - Framingham, MA

- 5 aisles, (14) 4 ft. gondolas per aisle, 280 running feet, over 1,600 sq. ft. of Auto Products
- Auto Dept. also was located in the back corner of the store.
- Aisles & categories were unmarked, making it time-consuming locating a specific area.
- While Motor Oil & Filters are carried, both had 2 brands and significantly less space inventory) to the categories (vs. Bradlees).
- Caldor uses 1 wall to peghook interior accessories, antennas, wheel covers, tie-downs vs. shelving.
- Virtually the same categories & brands carried by Caldor as Bradlees
- There is a lot of opportunity in certain categories to repackage or offer a stronger visual to consumers to make the identification of the segment and product easier.

- (e.g.
- Car Mats
 - Chemicals
 - Interior Accessories
 - Lighting
 - Wire
 - Fuses
 - Tools)

- Categories well packaged:

- Antennas	- Cleaners
- Wipers	- Paint Touch-up
- Spark Plugs	- Tie-Downs

C. Lechmere's - Natick, MA

- Lechmere's is a growing discounter that offers a narrow selection, medium depth at great prices.
- They usually carry Household Products, no Fashion, no Major Appliances
- No Auto Products were carried, only Roof/Trunk Racks in the Sports Section.

II. Department Stores

A. Sears Auto Center - Natick, MA

- Separate building from Sears Dept.
- Service Center bays. Waiting area next to retail products. "Browse" & Buy" layout.
- Sell tires & auto aftermarket products in a 5M sq. ft. space
- Categories:
 - Batteries
 - Tires
 - Battery charger: Private Label
 - Cables: 12, 16, 18 ft.; 5, 6, 8 gauge, (2) 4 ft. Gondolas: Private Label
 - Car Covers, 2 - 4 ft.

- Touch-Up Paint: Duplicolor
- Body Repair Kit & products:
 - Tools - Abrasives - Matting
 - Hardeners - Polishes - Putty
- Motor Oils
- Lighting: Philips (Headlamps, Bulbs, Halogens)
- Wipers: Anco
- Roof Racks: Kar-Rite
- Antifreeze & Coolant
- Car Mats
- Waxes & Polishes
- Fuses: Littlefuse
- Brake Fluids, Starting Fluids, Gas Additives
- Filters: Air & Oil
- Wheel Covers
- Spark Plugs
- Only a few Interior Accessories

III. Auto Chains

A. Auto Palace (Rite-Aid) - Formerly ADAP

- One of their older retail sites. Moving in 6 months next door to a new facility.
- 8 aisles, check out (cash register) counters at the front of the store.
- (15) 4 ft. gondolas on each side of the aisle. Almost 1,000 running ft.
- Back of store has the Service Counter for Hard Parts
- Next to the register:
 - Auto Magazines
 - Sunglasses
 - Interior Accessories (impulse buy items, like key chains)
- End caps throughout the store:

• Rally Wheel Covers	• Caps	• Taps
• Scrapers (2 locations)	• Tire Inflators (Super-X)	• Starting Fluid
• Halogen Lamps	• STP Oil/Engine Additives	
• Wipers (Anco)	• Car Covers	
• Electronic Flares	• Hand Cleaner	
• Armor-All Gift Pack	• Hydraulic Jacks	
- Several Air Freshener Pre-pack floor displays
- Interior Accessories (5 gondolas): Rally
- Speakers & Antennas (5 gondolas): Roadmaster, Kraco, Rally
- Steering Wheels (2 gondolas): Gant
- Motor Oil (15 gondolas): Castrol GTX, Valvoline, Sunoco
 - All had full cases for 3/4 of the gondola, top 2 shelves holding individual bottles.
- Headlight Covers (2 gondolas)
- Mechanical Security Locks (2 gondolas): Wolo
- Air & Oil Filters: (8 gondolas): Purolator (Domestics), Powerflo, Lapco (Imports)
- Oil & Lube change products (2 gondolas): Stant, Pews
- Antifreeze & Cleaners (2 gondolas): Prestone & others
- Adhesives (1 gondola): Loctite, Qualco
- Lubricants (1/2 gondola): Permatex

- Wipers (5 gondolas): Anco, Rally, Tridon
- Scents (2 gondolas): Medo
- Steering Wheel Covers (1 gondola): Custom Accessories
- Cup & Litter holders (2 gondolas): Rubber Queen
- Clothes, polishes, chamois (2 gondolas): Clean-Rite
- Waxes & cleaners (7 gondolas): Meguiar, Turtlewax, Rain Dance, Nu-Finish, Armor-All, SOS, Simonize, Simple Green, Blue Coral
- Engine Cleaners (4 gondolas): SolderSeal, STP, Gumout
- Fluids (Brake, Steering, Transmission) (5 gondolas): Prestone, Bardahl
- Batteries (3 racks): Exide
- Touch-up Paint (5 gondolas): Duplicolor
- DIY Books (2 gondolas): Chilton
- Wheelcovers (5 gondolas): Custom Accessories
(Did not record 2 of the 8 aisles!)

B. Indy Auto Parts - Saugus, MA

- Located in a strip mall, next to Midas Muffler & Speedee (oil change & tune-up specialty shop)
- Approximately 5M square foot. Gondola & wall fixtures.
- About 400 running feet
- Service Desk at back of store. Check out counter also in back.
- A lot of Truck Accessories in front of store:
 - Bedliner
 - Running Boards
 - Tool chests
 - Shocks (for trucks)
- Wipers: Anco (2 gondolas)
- Lights: Philips
- Very few Interior Accessories
- All peghooked or shelved, very little use of displays
- Wheel covers: Custom Accessories

Store Manager chat - Bob

- We offer lower prices than Auto Palace, but carry fewer SKUs & Brands.
- We basically offer the same Hard Parts inventory.
- Front door/retail merchandise accounts for 30-40% of our sales in this store.
- More over-the-counter sales

Competition: Contents

	<u>Pages</u>
1. List of Catalogs on file at the Canadian Consulate in Boston.....	127-128
2. APAA's list of Competitors by Category (1991)	129-153

Competitive Catalogs (on File)

- | | |
|---|---|
| 1. Automotive Paints | • Krylon & Duplicolor (Divisions of Sherwin Williams) |
| 2. Wipers | • Anco |
| 3. Wiring | • Calterm |
| 4. Fuses | • Littlefuse |
| 5. Lighting | • Blazer, Peterson Mfg. |
| 6. Accessories (Interior & Exterior) | • Rally, Custom Accessories |
| 7. Floor Mats | • Rubber Queen |
| 8. Battery Cable | • Carol Cable |
| 9. Car Covers | • Budge |
| 10. Truck Boxes | • Contico |
| 11. Antifreeze | • Prestone |
| 12. Motor Oil | • Castrol |
| 13. Body Fillers | • Bondo |
| 14. Protectants/Waxes | • Armor-All |
| 15. Auto Hoses | • Radiator Specialty |
| 16. Fluids, Chemicals, Cleaners | • Radiator Specialty |
| 17. Engine Rebuilding Equipment & Accessories | • Sunnen |

Price Lists (on File)

- | | |
|------------------------|---|
| 1. Custom Accessories: | Warehouse Distributor (effective 1/15/92) |
| 2. Budge: | Warehouse Distributor (effective 9/1/89) |
| 3. Jefferson: | Warehouse Distributor (effective 1/1/90) |
| 4. Rally: | Master Jobber (effective June, '92) |

Competitive Catalogs

- These catalogs represent a sampling of the type of catalogs used by key suppliers to the Auto Aftermarket.
- From these catalogs, please observe how these dominant market share suppliers segment their categories.
Example: Peterson Manufacturing's segmentation of the Lighting category.
 1. Back-up Lights
 2. Clearance, Marker, Identification, & Cab Lights
 3. Dome, Interior, & Utility Lights
 4. Emergency Lights
 5. Fog & Driving Lights, Kits & Accessories
 6. Hand Held Spotlights
 7. License Plate Lights
 8. Off-Road Lights & Light Bars
 9. Stop, Turn & Tail Lights
 10. Tractor & Implement Lights
 11. Trailer Lights & Kits
 12. Turn Signals
- While this is a sampling of several categories and key suppliers, most manufacturer/suppliers are willing to send out their catalogs. Just call their Customer Service Desk and request catalogs & pricing.
- Understand the segments, where your products fit, where you have "holes" in your line.

Product Categories (with Competitive Company listings)

Additives

A. Air Conditioning

Airosol Company, Inc. - Neodesha, KS
 CSA Ltd., Inc. - Houston, TX
 Interdynamics, Inc. - Brooklyn, NY
 Mega Power Inc. - Clearwater, FL
 Radiator Specialty Co. - Charlotte, NC
 Technical Chemical Company - Dallas, TX

B. Cooling System

Airosol Company, Inc. - Neodesha, KS
 China National Auto Industry - Beijing, China
 CSA Ltd., Inc. - Houston, TX
 Cyclo Automotive Products - Lake Park, FL
 First Brands Corporation - Danbury, CT
 Gold Eagle Company - Chicago, IL
 Hastings Mfg. Company - Hastings, MI
 Hebe Company Ltd. - Taipei, Taiwan
 Henley Chemicals - Montvale, NJ
 K & W Products - Bell Gardens, CA
 Klinview - Irvine, CA
 Mega Power Inc. - Clearwater, FL
 Nationwide Industries, Inc. - Durham, NC
 Qualco Products Company - Fanwood, NJ
 Radiator Specialty Co. - Charlotte, NC

C. Fuel System

AGS Company - Muskegon, MI
 Airosol Company, Inc. - Neodesha, KS
 Alemite CD-2 Company - Prospect, IL
 Bell Additives, Inc. - Longwood, FL
 Berryman Products, Inc. - Arlington, TX
 Blue Coral, Inc. - Cleveland, OH
 Chevron Chemical Co. - San Ramon, CA
 CSA Ltd., Inc. - Houston, TX
 Cyclo Automotive Products - Lake Park, FL
 First Brands Corporation - Danbury, CT
 Gold Eagle Company - Chicago, IL
 Hastings Mfg. Company - Hastings, MI
 Heet Automotive Division - Oak Brook, IL
 Henley Chemicals - Montvale, NJ
 K & W Products - Bell Gardens, CA
 Kratz Auto Supplies, Inc. - Kensington, MD
 Lifetime Automotive Products - Dallas, TX
 Major Automotive Products - St. James, NY
 Marvel Oil Company - Port Chester, NY
 Mega Power Inc. - Clearwater, FL
 National Interchem, Corp. - Chicago, IL
 Nationwide Industries, Inc. - Durham, NC

C. Fuel System (contd.)

North American Oil Company - Atlanta, GA
 Octane Boost Corporation - Dallas, TX
 Phillips 66 Company - Bartlesville, OK
 Radiator Specialty Co. - Charlotte, NC
 RXP Products Inc. - St. Petersburg, FL
 Shaler Company - Waupun, WI

D. Engine

AGS Company - Muskegon, MI
 Airosol Company, Inc. - Neodesha, KS
 Alemite CD-2 Company - Mt. Prospect, IL
 Bardahl Manufacturing Corp. - Seattle, WA
 Bell Additives, Inc. - Longwood, FL
 Blue Coral, Inc. - Cleveland, OH
 Chevron Chemical Co. - San Ramon, CA
 CSA Ltd., Inc. - Houston, TX
 Cyclo Automotive Products - Lake Park, FL
 First Brands Corporation - Danbury, CT
 Gold Eagle Company - Chicago, IL
 Hastings Mfg. Company - Hastings, MI
 Heet Automotive Division - Oak Brook, IL
 K & W Products - Bell Gardens, CA
 Kratz Auto Supplies, Inc. - Kensington, MD
 Mega Power Inc. - Clearwater, FL
 National Interchem, Inc. - Chicago, IL
 Nationwide Industries, Inc. - Durham, NC
 Radiator Specialty Co. - Charlotte, NC
 Restore Inc. - Ft. Lauderdale, FL
 Shaler Company - Waupun, WI
 Slick 50 - Houston, TX
 Wynn Oil Company

E. Transmission

AGS Company - Muskegon, MI
 Alemite CD-2 Company - Mt. Prospect, IL
 Bardahl Manufacturing Corp. - Seattle, WA
 CSA Ltd., Inc. - Houston, TX
 Cyclo Automotive Products - Lake Park, FL
 First Brands Corporation - Danbury, CT
 Gold Eagle Company - Chicago, IL
 Hastings Mfg. Company - Hastings, MI
 K & W Products - Bell Gardens, CA
 Kratz Auto Supplies, Inc. - Kensington, MD
 Marvel Oil Company - Port Chester, NY
 Mega Power Inc. - Clearwater, FL
 National Interchem, Inc. - Chicago, IL
 Nationwide Industries, Inc. - Durham, NC
 North American Oil Company - Atlanta, GA

E. Transmission (contd.)

Radiator Specialty Co. - Charlotte, NC
Slick 50 - Houston, TX

F. Other

20/10 Products -
AGS Company - Muskegon, MI
Alemite CD-2 Company - Prospect, IL
Gold Eagle Company - Chicago, IL
Hastings Mfg. Company - Hastings, MI
Heet Automotive Division - Oak Brook, IL
Henley Chemicals - Montvale, NJ
K & W Products - Bell Gardens, CA
Kratz Auto Supplies, Inc. - Kensington, MD
Marvel Oil Company - Port Chester, NY
Mega Power Inc. - Clearwater, FL
North American Oil Company - Atlanta, GA
Octane Boost Corporation - Dallas, TX
Phillips 66 Company - Bartlesville, OK
Radiator Specialty Co. - Charlotte, NC
Rust Evader Corp. - Altoona, PA
Shaler Company - Waupun, WI
Tara Developments - Saskatoon, Canada
Telecomp Computer Systems - Milford, CT

Air Conditioning Systems/Components

Everco Industries - Melrose Park, IL
Four Seasons - Grapevine, TX
Harvey Westbury Corporation - Westbury, NY
Interamerican Trade Corp. - Dayton, OH
Interdynamics, Inc. - Brooklyn, NY
Modine Manufacturing - Racine, WI
Motorcraft (Ford) - Dearborn, MI
Motormite Manufacturing - Colmar, PA
Nippodenso of LA Inc. - Long Beach, CA
Rahn Industries, Inc. - Los Angeles, CA

Air Fresheners

Allison Corporation - Livingston, NJ
American Automotive Mktg. - Holbrook, NY
Blazer Int'l Corp. - Franklin Park, IL
Blue Coral, Inc. - Cleveland, OH
Car-Freshener Corporation - Watertown, NY
Coido Corporation - Taipei, Taiwan
CSI Mfg. & Dist. Inc. - Winnipeg, Canada
Elevation Corp. - Scarsdale, NY
Marlenn Corp. - Baltimore, MD
Medo Industries - Mt. Vernon, NY
Ocean Fresh Inc. - Miami, FL
Poli-Auto Inc. - Miami, FL - Miami, FL

Air Fresheners (contd.)

Qualco Products Company - Fanwood, NJ
Rally Manufacturing, Inc. - Miami, FL
Roberta's Inc. - Shelbyville, IN
Royal Sound Company - Eatontown, NJ

Antennas

Ancoa Antenna Corp. - New Brunswick, NJ
Audiovox Corporation - Hauppauge, NY
Epicor Industries, Inc. - Deerfield, IL
Kraco Enterprises, Inc. - Compton, CA
Mr. Gasket Company - Cleveland, OH
Poli-Auto Inc. - Miami, FL
Rally Manufacturing, Inc. - Miami, FL
Sparkomatic Corporation - Milford, PA
Unikent Corporation - Taipei, Taiwan
Wang's International Inc. - Baldwin Park, CA

Audio: Sound Systems, Speakers

Ace Hardware Supplies - Central, Hong Kong
American Int'l Pacific Ind. - Camarillo, CA
Ancoa Antenna Corp. - New Brunswick, NJ
Audiovox Corporation - Hauppauge, NY
Driver Design/National Cycle - Maywood, IL
Hong Kong Trade Devel. - Chicago, IL
Kraco Enterprises, Inc. - Compton, CA
Mr. Gasket Company - Cleveland, OH
RJP Electronics/Computrex, Inc. - Chicago, IL
Royal Sound Company - Eatontown, NJ
Shosche Industries, Inc. - Moorpark, CA
Sparkomatic Corporation - Milford, PA

Batteries

AC - Delco - Detroit, MI
Ace Hardware Supplies - Central, Hong Kong
Altus Technology Corp. - Minnetonka, MN
Cam2 Oil Products Company - New Britain, PA
Carol Cable Company, Inc. - Pawtucket, RI
Century Manufacturing Co. - Minneapolis, MN
China National Auto Industry - Beijing, China
Cobraline Manufacturing Corp. - Syosset, NY
Coleman Cable Systems - N. Chicago, IL
Columbia Wire & Cable Corp. - Brooklyn, NY
Custom Accessories - Niles, IL
DHC Specialty Corp. - Taipei, Taiwan
Dorcy Motorcycle Prods Div. - Columbus, OH
Douglas Battery Mfg. Co. - Winston-Salem, NC
East Penn Mfg., Inc. - Lyon Station, PA
Echlin/Auto-Tune - Franklin Park, IL
Equus Products, Inc. - Fountain Valley, CA

Batteries (contd.)

Exide Corporation - Reading, PA
Federal Parts Corp. - Dallas, TX
First Alert - Aurora, IL
GNB Incorporated - Atlanta, GA
Harvey Westbury Corporation - Westbury, NY
Hong Kong Trade Devel. - Chicago, IL
Midtronics, Inc. - Blue Island, IL
Mize and Co. Inc. - Kingman, KS
Motorcraft (Ford) - Dearborn, MI
Motormite Manufacturing - Colmar, PA
Mr. Gasket Company - Cleveland, OH
Noco Company - Cleveland, OH
Nu View Products - Lakeside, CA
Poli-Auto Inc. - Miami, FL
Qualco Products Company - Fanwood, NJ
Schauer Manufacturing Co. - Cincinnati, OH
Schumacher Electric Corp. - Chicago, IL
Sentry Pack - Westbury, CT
Sureflex, Inc. - Kansas City, MO
Victor Auto Prods, Inc. - Des Plaines, IL
Web Wire & Cable Mfg. Co. - Miami, FL
Wichien Auto Parts Ltd., Part. - Thailand

Bearings

China National Auto Industry - Beijing, China
Evergreen Automobiles - Delhi, India
Green Ball Bearing Co. - Cleveland, OH
Motormite Manufacturing - Colmar, PA
Saginaw Industries, Inc. - Chicago, IL

Belts, Hoses, Wiper Blades

Ace Hardware Supplies - Central, Hong Kong
Alpena/Marklyn Co. Inc. -
Anco, Inc. - Michigan City, IN
Bonatrade International Inc. - Santa Ana, CA
Camel Products - Muskogee, OK
Carrand Companies, Inc. - Gardena, CA
China National Auto Industry - Beijing, China
Clear Star Products - Richmond Hill, NY
Cobraline Manufacturing Corp. - Syosset, NY
Dayco Products, Inc. - Dayton, OH
Epicor Industries, Inc. - Deerfield, IL
Everco Industries - Melrose Park, IL
Four Seasons - Grapevine, TX
Hanna Rubber Co., Inc. - Bell, CA
Interamerican Trade Corp. - Dayton, OH
Lifetime Automotive Products - Dallas, TX
Motorcraft (Ford) - Dearborn, MI

Belts, Hoses, Wiper Blades (contd.)

Motormite Manufacturing - Colmar, PA
Mr. Gasket Company - Cleveland, OH
Pirelli Power Transmission - Red Wing, MN
Plumley Companies - Paris, TN
Poli-Auto Inc. - Miami, FL
Pylon Mfg. Corp. - Deerfield Beach, FL
Qualitee International Parts - Richmond, VA
Radiator Specialty Co. - Charlotte, NC
Saginaw Industries, Inc. - Chicago, IL
Thermoid/HBD Ind., Inc. - Bellefontaine, OH
Trico Products Corporation - Buffalo, NY
Tridon Inc. - Smyrna, TN
Unikent Corporation - Taipei, Taiwan
Victor Auto Prods, Inc. - Des Plaines, IL
Wang's International Inc. - Baldwin Park, CA

Body Repair

3M Company - St. Paul, MN
Bondo Consumer Products Div. - Atlanta, GA
Devcon Consumer Division - Wood Dale, IL
Hunting Specialty Prods., Inc. - Lebanon, OH
Intermarket, Inc. - Guilderland, NY
Klean-Strip Automotive Div. - Memphis, TN
Loctite Corporation - Cleveland, OH
Marson Corporation - Chelsea, MA
Mr. Gasket Company - Cleveland, OH
Qualco Products Company - Fanwood, NJ
Seal-Rite/Auto Insulation, Inc. - Mt. Holly, NJ
Talsol Corporation/Mar-Hyde - Cincinnati, OH

Body Trim/Moldings

Aristo-Craft Inc. - Romeo, MI - Romeo, MI
Chroma Graphics, Inc. - Alcoa, TN
Chuan Hseng Co. Ltd. - Taipai, Taiwan
G.T. Styling, Inc. - Costa Mesa, CA
I.M.I./Sunup - Buena Park, CA
J.S. Parker International Ltd. - Ontario, Canada
Pacer Performance Prods. - Los Angeles, CA
Silvatrim Corp. of America - S. Plainfield, NJ
Unikent Corporation - Taipei, Taiwan
Yih-Tair Industrial Co. Ltd. - Taiwan

Brake System Components

ABSCO Limited - Quebec City, Canada
China National Auto Industry - Beijing, China
Chuan Hseng Co., Ltd. - Taipei, Taiwan
Dorman Products - Warsaw, KY
Giant Industrial Corp. - Farmingdale, NY
Hong Kong Trade Devel. - Chicago, IL

Brake System Components (contd.)

Indumet C.A. - Caracas, Venezuela
Interamerican Trade Corp. - Dayton, OH
International Precision Ind. - Toronto, Canada
Maremont Exhaust Prod, Inc. - Carol Stream, IL
Master Parts - Fairfield, IL
MCI Automotive Products - Chicago, IL
Motormite Manufacturing - Colmar, PA
Qualitee International Parts - Richmond, VA
Radiator Specialty Co. - Charlotte, NC
Raybestos/Brake Parts, Inc. - McHenry, IL
Saginaw Industries Inc. - Chicago, IL
Shou Ie Enterprise Co., Ltd. - Taipei, Taiwan
Unikent Corporation - Taipei, Taiwan

Brushes, Scrapers, Squeegees

Ace Hardware Supplies - Central, Hong Kong
Armaly Sponge Company - Walled Lake, MI
Bloch/New England - Worcester, MA
Buffalo Tool Corp. - St. Louis, MO
Carrand Companies, Inc. - Gardena, CA
Custom Accessories - Niles, IL
Detailed Designs, Inc. - Plainfield, NJ
F.P. Feature Prods. - Rolling Meadows, IL
Gary Precision Products - Greenwich, CT
Hopkins Manufacturing Corp. - Emporia, KS
InterAmerican Trade Corp. - Dayton, OH
J.M. Rennis, Inc. - Bridgeport, CT
Koolatron - Raywares - Ontario, Canada
Lifetime Automotive Products - Dallas, TX
Mallory Industries, Inc. - Ontario, Canada
Molor Products Company - Naperville, IL
Nation/Ruskin, Inc. - Montgomeryville, PA
Rally-Mag Products - Newport Beach, CA
Rubbermaid Specialty Prods. - Smithville, OH
Schroeder & Tremayne, Inc. - Fenton, MO
Turbo Tek, Inc. - Los Angeles, CA

Bumper Guards

Aristo-Craft Inc. - Romeo, MI
Fey Automotive Products - Irwindale, CA
Gem Mfg. Company, Inc. - Chicago, IL
Unikent Corporation - Taipei, Taiwan

CB Radios/Accessories

American Int'l Pacific Ind. - Camarillo, CA
Audiovox Corporation - Hauppauge, NY
Barjan Products - East Moline, IL
Kraco Enterprises, Inc. - Compton, CA
Midtronics, Inc. - Blue Island, IL

CB Radios/Accessories (contd.)

Royal Sound Company - Eatontown, NJ

Cans: Oil, Gas Fuel

Eastom Corporation - Vista, CA
Flotool International - Santa Ana, CA
Midwest Can Company - Franklin Park, IL
Rubbermaid Specialty Prods. - Smithville, OH
U.S. Metal Container Co. - Miami, OK

Carpets

Allison Corporation - Livingston, NJ
Jefferson Industries - Chicago, IL
Kook Kooshion Industries - Memphis, TN
Newark Auto Products - West Orange, NJ
Poli-Auto Inc. - Miami, FL
Posit-Plus, Inc. - Monrovia, CA
Sperling Enterprises Pty., Ltd. - Australia

Carriers: Car Top, Luggage, Tire

Aristo-Craft Inc. - Romeo, MI
California Innovations Inc. - Ontario, Canada
Contico Automotive - St. Louis, MO
Denco Incorporated - Salt Lake City, UT
Highland Group Ind. L.P. - Cleveland, OH
I.M.I./Sunup - Buena Park, CA
Kar Rite International - Franklin Park, IL
PIAA Corporation, USA - Gardena, CA
Rubbermaid Specialty Prods. - Smithville, OH
Sport Rack Systems Inc. - Yuba City, CA

Chains

China National Auto Industry - Beijing, China
Mita Corp. - Tokyo, Japan
Peerless Chain Co. -
Security Chain Company - Portland, OR

Charging System

AC - Delco - Detroit, MI
American Int'l Pacific Ind. - Camarillo, CA
Automotive Enterprises - Passaic, NJ
China National Auto Industry - Beijing, China
Cobraline Manufacturing Corp. - Syosset, NY
Coleman Cable Systems - N. Chicago, IL
Coleman Powermate - Kearney, NE
Giant Industrial Corp. - Farmingdale, NY
Hong Kong Trade Devel. - Chicago, IL
MPA (Moto Parts & Acc.) - Santa Fe Spring, CA
MCI-Mach. Components, In. - St. Charles, IL
Motorcraft (Ford) - Dearborn, MI
Motormite Manufacturing - Colmar, PA
Schauer Manufacturing Co. - Cincinnati, OH

Chemicals

A. Antifreeze

BASF Corporation - Parsippany, NY
Berkebile Oil Co., Inc. - Somerset, PA
Cam2 Oil Products Company - New Britain, PA
Camco Mfg., Inc. - Greensboro, NC
Champion Packaging & Dist. - Lombard, IL
Citgo Petroleum Corp. - Tulsa, OK
First Brands Corporation - Danbury, CT
Flotool International - Santa Ana, CA
Heet Automotive Division - Oak Brook, IL
Jetgo Auto Products - Newark, NJ
Nationwide Industries, Inc. - Durham, NC
Old World Automotive Prd./Peak
Phillips 66 Company - Bartlesville, OK
Pitt Penn Oil Co. - Creighton, PA
Quaker State Corporation - Oil City, PA
Specialty Oil Company Inc. - Shreveport, LA
Texaco Lubricants Company - Houston, TX

B. Carburetor Cleaner

AGS Company - Muskegon, MI
Airosol Company, Inc. - Neodesha, KS
Altawood Aerosols - Upland, CA
Bardahl Manufacturing Corp. - Seattle, WA
Bell Additives, Inc. - Longwood, FL
Berkebile Oil Co., Inc. - Somerset, PA
Berryman Products, Inc. - Arlington, TX
Blue Coral, Inc. - Cleveland, OH
Cam2 Oil Products Co. - New Britain, PA
Chevron Chemical Co. - San Ramon, CA
CSA Ltd., Inc. - Houston, TX
Cyclo Automotive Products - Lake Park, FL
First Brands Corporation - Danbury, CT
Gold Eagle Company - Chicago, IL
Gumout Division - Pittsburgh, PA
Heet Automotive Division - Oak Brook, IL
Jetgo Auto Products - Newark, NJ
K & W Products - Bell Gardens, CA
Klean-Strip Automotive Div. - Memphis, TN
Mega Power Inc. - Clearwater, FL
National Interchem, Corp. - Chicago, IL
Nationwide Industries, Inc. - Durham, NC
Octane Boost Corporation - Dallas, TX
Quaker State Corporation - Oil City, PA
Radiator Specialty Co. - Charlotte, NC
Taylor Made Products Co. - Macedonia, OH
Technical Chemical Company - Dallas, TX

B. Carburetor Cleaner (contd.)

Unival Corporation - Yonkers, NY
William K. Westley Co. - Garfield Heights, OH
Wynn Oil Company - Azusa, CA
X Laboratories, Inc. - Wheeling, IL
Yale Engineering Company - Chicago, IL

C. De-Icer

303 Products, Inc. - Redding, CA
Airosol Company, Inc. - Neodesha, KS
BASF Corporation - Parsippany, NY
Cam2 Oil Products Company - New Britain, PA
First Brands Corporation - Danbury, CT
Gold Eagle Company - Chicago, IL
Heet Automotive Division - Oak Brook, IL
Kafko International Ltd. - Chicago, IL
National Interchem, Corp. - Chicago, IL
Nationwide Industries, Inc. - Durham, NC
North American Oil Company - Atlanta, GA
Old World Auto Prd./Peak - Northbrook, IL
Qualco Products Company - Fanwood, NJ
Radiator Specialty Co. - Charlotte, NC
Technical Chemical Company - Dallas, TX
Turtle Wax - Chicago, IL
Unival Corporation - Yonkers, NY

D. Parts Cleaner

AGS Company - Muskegon, MI
Airosol Company - Neodesha, KS
Altawood Aerosols - Upland, CA
Bardahl Manufacturing Corp. - Seattle, WA
Berkebile Oil Co., Inc. - Somerset, PA
Berryman Products, Inc. - Arlington, TX
Cam2 Oil Products Company - New Britain, PA
Cyclo Automotive Products - Lake Park, FL
Gold Eagle Company - Chicago, IL
Gumout Division - Pittsburgh, PA
Jetgo Auto Products - Newark, NJ
Klean-Strip Automotive Div. - Memphis, TN
Loctite Corporation - Cleveland, OH
Nationwide Industries, Inc. - Durham, NC
Radiator Specialty Co. - Charlotte, NC
Solv-o Corporation - Taylor, MI
Taylor Made Products Company
Technical Chemical Company - Dallas, TX
Unival Corporation - Yonkers, NY
X Laboratories, Inc. - Wheeling, IL
Yale Engineering Company - Chicago, IL

E. Refrigerants

Airosol Company, Inc. - Neodesha, KS
Cam2 Oil Products Company - New Britain, PA
CSA Ltd., Inc. - Houston, TX
Harvey Westbury Corporation - Westbury, NY
Ig-Lo, Inc./Pyroil - Lexington, KY
Interdynamics, Inc. - Brooklyn, NY
Radiator Specialty Co. - Charlotte, NC
Technical Chemical Company - Dallas, TX

F. Rustproofing

Audiovox Corporation - Hauppauge, NY
Cam2 Oil Products Company - New Britain, PA
CSA Ltd., Inc. - Houston, TX
Hunting Specialty Prods., Inc. - Lebanon, OH
K & W Products - Bell Gardens, CA
Kratz Auto Supplies, Inc. - Kensington, MD
Loctite Corporation - Cleveland, OH
Nationwide Industries, Inc. - Durham, NC
Radiator Specialty Co. - Charlotte, NC
Rust Evader Corp. - Altoona, PA
Solv-o Corporation - Taylor, MI

G. Sealers

Alumaseal Corporation - Scottsdale, AZ
Audiovox Corporation - Hauppauge, NY
Bar's Leaks, Inc. - Holly, MI
BASF Corporation - Parsippany, NY
Cam2 Oil Products Company - New Britain, PA
First Brands Corporation - Danbury, CT
Gold Eagle Company - Chicago, IL
J-B Weld - Sulphur Springs, TX
K & W Products - Bell Gardens, CA
Loctite Corporation - Cleveland, OH
Nationwide Industries, Inc. - Durham, NC
One Grand Products, Inc. - Van Nuys, CA
Qualco Products Company - Fanwood, NJ
Radiator Specialty Co. - Charlotte, NC
Talsol Corporation/Mar-Hyde - Cincinnati, OH
Unival Corporation - Yonkers, NY
Yale Engineering Company - Chicago, IL

H. Starting Fluid

Airosol Company, Inc. - Neodesha, KS
BASF Corporation - Parsippany, NY
Berkebile Oil Co., Inc. - Somerset, PA
Cam2 Oil Products Company - New Britain, PA
Cyclo Automotive Products - Lake Park, FL
Berkebile Oil Co., Inc. - Somerset, PA
First Brands Corporation - Danbury, CT

H. Starting Fluid (contd.)

Gold Eagle Company - Chicago, IL
K & W Products - Bell Gardens, CA
Loctite Corporation - Cleveland, OH
Nationwide Industries, Inc. - Durham, NC
Quaker State Corporation - Oil City, PA
Radiator Specialty Co. - Charlotte, NC
Technical Chemical Company - Dallas, TX
X Laboratories, Inc. - Wheeling, IL

I. Tar Remover

Airosol Company, Inc. - Neodesha, KS
Audiovox Corporation - Hauppauge, NY
Blue Coral, Inc. - Cleveland, OH
Cam2 Oil Products Company - New Britain, PA
CSA Ltd., Inc. - Houston, TX
Cyclo Automotive Products - Lake Park, FL
Plasti-Kote Company, Inc. - Medina, OH
Radiator Specialty Co. - Charlotte, NC
Ronson Cons. Pros Corp. - Somerset Park, NJ
Turtle Wax - Chicago, IL

J. Tire Sealant/Inflator

Airosol Company, Inc. - Neodesha, KS
Berkebile Oil Co., Inc. - Somerset, PA
Berryman Products, Inc. - Arlington, TX
Cam2 Oil Products Company - New Britain, PA
Cyclo Automotive Products - Lake Park, FL
Gold Eagle Company - Chicago, IL
Gumout Division - Pittsburgh, PA
Nationwide Industries, Inc. - Durham, NC
Radiator Specialty Co. - Charlotte, NC
Sentry Pack - Westbury, CT
Taylor Made Products Co. - Macedonia, OH
Technical Chemical Company - Dallas, TX
X Laboratories, Inc. - Wheeling, IL

K. Undercoating

Audiovox Corporation - Hauppauge, NY
Berkebile Oil Co., Inc. - Somerset, PA
Cam2 Oil Products Company - New Britain, PA
CSA Ltd., Inc. - Houston, TX
Cyclo Automotive Products - Lake Park, FL
Gold Eagle Company - Chicago, IL
Hunting Specialty Prods., Inc. - Lebanon, OH
K & W Products - Bell Gardens, CA
Marson Corporation - Chelsea, MA
Nationwide Industries, Inc. - Durham, NC
Radiator Specialty Co. - Charlotte, NC
Talsol Corporation/Mar-Hyde - Cincinnati, OH

K. Undercoating (contd.)

Taylor Made Products Co. - Macedonia, OH
Unival Corporation - Yonkers, NY

Clocks, Compasses

Ace Hardware Supplies - Central, Hong Kong
Airguide Instrument Co. - Buffalo Grove, IL
Allison Corporation - Livingston, NJ
Custom Accessories - Niles, IL
Equus Products, Inc. - Fountain Valley, CA
Make Waves Inst. Corp. - Williamsport, NY
Molor Products Company - Naperville, IL
Rally Manufacturing, Inc. - Miami, FL
Sherrill Corporation - Elkhart, IN
Zemco Group, Inc. - San Ramon, CA

Clutches

China National Auto Industry - Beijing, China
Giant Industrial Corp. - Farmingdale, NY
Green Ball Bearing Co. - Cleveland, OH
Mr. Gasket Company - Cleveland, OH
Qualitee International Parts - Richmond, VA
Saginaw Industries, Inc. - Chicago, IL
Shou Ie Enterprise Co., Ltd. - Taipei, Taiwan

Computer Programs

Consolidated Freightways - Menlo Park, CA
Gladson & Associates - Lisle, IL
IBM - White Plains, NY
ICAS Computer Systems Inc. - Dover, NJ
Marketware Corporation - Cambridge, MA
Meyers Publishing - Van Nuys, CA
Retail Resources, Inc. - Rochester Hills, MI
S.A.S.I. - Bensalem, PA
Telecomp Computer Systems - Milford, CT
Triad Systems - Livermore, CA
Ultimate Inventory Solutions - Parsippany, NJ

Cooling System Components

Automotive Enterprises - Passaic, NJ
China National Auto Industry - Beijing, China
Dayco Products Inc. - Dayton, OH
Dorman Products - Warsaw, KY
Epicor Industries, Inc. - Deerfield, IL
Evergreen Automobiles - Delhi, India
Four Seasons - Grapevine, TX
Hayden Inc. - Corona, CA
Hebe Company Ltd. - Taipei, Taiwan
Interdynamics, Inc. - Brooklyn, NY
Master Parts - Fairfield, IL
Modine Manufacturing - Racine, WI

Cooling System Components (contd.)

Motorad of America - Niagara Falls, NY
Motormite Manufacturing - Colmar, PA
Mr. Gasket Company - Cleveland, OH
Optronics/Thermo-Chem - Fort Gibson, OK
Poli-Auto Inc. - Miami, FL
Witteck Companies International - Galesburg, IL

Cords: Tie-Downs, Tow Ropes, Straps

Allison Corporation - Livingston, NJ
American Int'l Pacific Ind. - Camarillo, CA
Barjan Products - East Moline, IL
Buffalo Tool Corp. - St. Louis, MO
Bungee Int'l Mfg. Corp. - Chatsworth, CA
Camco Mfg., Inc. - Greensboro, NC
Carrand Companies, Inc. - Gardena, CA
Coleman Cable Systems - N. Chicago, IL
Cragger Wheel & Exhaust Div. - Cleveland, OH
Crowe Rope Company - Warren, ME
Custom Accessories - Niles, IL
Denco Incorporated - Salt Lake City, UT
Hi-Lift Jack Company - Bloomfield, IN
Highland Group Ind. L.P. - Cleveland, OH
Kar Rite International - Franklin Park, IL
Make Waves Inst. Corp. - Williamsport, NY
Mr. Gasket Company - Cleveland, OH
Penda Corporation - Portage, WI
Poli-Auto Inc. - Miami, FL
Powerflow, Inc. - Buffalo, NY
Radiator Specialty Company - Charlotte, NC
Seville Classics - Gardena, CA
Superior Industries - Van Nuys, CA
Superwinch, Inc. - Putnam, CT
Victor Auto Products, Inc. - Des Plaines, IL
Yeu Yeh Enterprise Co. Ltd. - Tempe, AZ

Covers: Car, Fender, Steering Wheel

Ace Hardware Supplies - Central, Hong Kong
Allison Corporation - Livingston, NJ
Budge Industries, Inc. - Pennsauken, NJ
Classic Accessories - Seattle, WA
Covercraft Industries, Inc. - Chatsworth, CA
Coverite Ind. Inc. - Pomona, CA
Custom Accessories - Niles, IL
Driver Design/National Cycle - Maywood, IL
Elegant Industries, Inc. - Elizabeth, NJ
Eppco Enterprises, Inc. - Cleveland, OH
Grant Products - Glendale, CA
H & L Products, Inc. - National City, CA

Covers: Car, Fender, Steering Wheel (contd.)

Innovative Accessories, Inc. - Norman, OK
Marson Corporation - Chelsea, MA
Newark Auto Products - West Orange, NJ
Poli-Auto Inc. - Miami, FL
Rally Manufacturing, Inc. - Miami, FL
Saddleman Inc. - Logan, UT
Shou Ie Enterprise Co. Ltd. - Taipei, Taiwan
Superior Industries - Van Nuys, CA
Wang's International Inc. - Baldwin Park, CA
Wheelskins - Berkeley, CA
Wilmar Corporation - Seattle, WA
Wolf Automotive - Santa Ana, CA

Dash Covers

Covercraft Industries, Inc. - Chatsworth, CA
Dash Designs Inc. - Tempe, AZ
Dashking - Santa Ana, CA
Dashmat Company - Phoenix, AZ
Jefferson Industries - Chicago, IL
Madera Concepts - Santa Barbara, CA
Priority Precision Products - Westbury, NY
The Shade - Cocoa, FL

Decals

Allison Corporation - Livingston, NJ
American Int'l Pacific Ind. - Camarillo, CA
Barjan Products - East Moline, IL
Cal/Emblem Labels - Fresno, CA
Central Decal Co. Inc. - Chicago, IL
Chroma Graphics, Inc. - Alcoa, TN
G.T. Styling, Inc. - Costa Mesa, CA
Marienn Corp. - Baltimore, MD
Silvatrim Corp. of America - S. Plainfield, NJ
Spartan International, Inc. - Holt, MI
Tag Express - Duluth, GA
Ultra Hot Graphics, Inc. - Conroe, TX

Deflectors/Screens

China National Auto Industry - Beijing, China
Covercraft Industries, Inc. - Chatsworth, CA
Deflecta-Shield Corp. - Urbandale, IA
G.T. Styling, Inc. - Costa Mesa, CA
I.M.I./Sunup - Buena Park, CA
Kar Rite International - Franklin Park, IL
Lund Industries - Minneapolis, MN
Pardners Unlimited - Tulsa, OK
Penda Corporation - Portage, WI
Rubber Queen - Dublin, OH
Victor Auto Prods, Inc. - Des Plaines, IL

Deflectors/Screens (contd.)

Wolf Automotive - Santa Ana, CA

Defoggers, Defrosters

Audiovox Corporation - Hauppauge, NY
Hebe Company Ltd. - Taipei, Taiwan
Hong Kong Trade Devel. - Chicago, IL
Klinview - Irvine, CA
Qualco Products Company - Fanwood, NJ

Drive Train & Transmission Components

Alloy Industries, Inc. - Chicago, IL
Autocraft Mfg. Co., Inc. - Merritt Island, FL
Dorman Products - Warsaw, KY
Evergreen Automobiles - Delhi, India
Green Ball Bearing Co. - Cleveland, OH
Hayden Inc. - Corona, CA
Maremont Exhaust Prod Inc. - Carol Stream, IL
Motormite Manufacturing - Colmar, PA
Mr. Gasket Company - Cleveland, OH
Saginaw Industries, Inc. - Chicago, IL

Electrical Lighting

AGS Company - Muskegon, MI
Allformosan Industrial Corp. - Taipei, Taiwan
Blazer Int'l Corp. - Franklin Park, IL
Bonatrade International Inc. - Santa Ana, CA
Chieftain Auto Products - N. Augusta, SC
China National Auto Industry - Beijing, China
Durimex, Inc. - Orange, CA
First Alert - Aurora, IL
GE Lighting - Cleveland, OH
Harvey Westbury Corporation - Westbury, NY
Hebe Company Ltd. - Taipei, Taiwan
Innocorp Manufacturing, Inc. - Coloma, MI
Intermark World Prod./Swirlon - Kenilworth, IL
K-D Lamp Company - Cincinnati, OH
Leen & Associates - Bellevue, WA
MPA (Moto Parts & Acc.) - Santa Fe Spring, CA
Mag Instrument Company - Ontario, CA
Motormite Manufacturing - Colmar, PA
Optronics/Thermo-Chem - Fort Gibson, OK
Osram Corporation - Montgomery, NY
Pacer Performance Prods. - Los Angeles, CA
Peterson Manufacturing - Grandview, MO
Philips Lighting Company - Somerset, NJ
PIAA Corporation, USA - Gardena, CA
Poli-Auto Inc. - Miami, FL
Polin Electric Ind. Co. Ltd. - Keelung, Taiwan
Sylvania GTE - Hillsboro, NH

Electrical Lighting (contd.)

Victor Auto Prods, Inc. - Des Plaines, IL
Wagner Lighting Division - Chesterfield, MO
Wichien Auto Parts Ltd., Part. - Thailand

Electrical Wiring

A. Fuses

Allison Corporation - Livingston, NJ
Blazer Int'l Corp. - Franklin Park, IL
Bussmann - St. Louis, MO
Chieftain Auto Products - N. Augusta, SC
China National Auto Industry - Beijing, China
Custom Accessories - Niles, IL
Hong Kong Trade Devel. - Chicago, IL
Littlefuse, Inc. - Des Plaines, IL
Poli-Auto Inc. - Miami, FL
Victor Auto Prods, Inc. - Des Plaines, IL

B. Circuit Breakers

J-Mak Industries, Inc. - Columbus, OH
Littlefuse, Inc. - Des Plaines, IL

C. Connectors

3M Company - St. Paul, MN
Allison Corporation - Livingston, NJ
Blazer Int'l Corp. - Franklin Park, IL
Custom Accessories - Niles, IL
Dorman Products - Warsaw, KY
Hong Kong Trade Devel. - Chicago, IL
Mize and Co. Inc. - Kingman, KS
Wells Mfg. Corp. - Fond du Lac, WI.

D. Flashers

Allison Corporation - Livingston, NJ
Blazer Int'l Corp. - Franklin Park, IL
Bussmann - St. Louis, MO
China National Auto Industry - Beijing, China
J-Mak Industries, Inc. - Columbus, OH
K-D Lamp Company - Cincinnati, OH
Peterson Manufacturing - Grandview, MO
Poli-Auto Inc. - Miami, FL
Tridon Inc. - Smyrna, TN
Wagner Lighting Division - Chesterfield, MO

E. Switches

Blazer Int'l Corp. - Franklin Park, IL
Calterm, Inc. - El Cajon, CA
China National Auto Industry - Beijing, China
Cobraline Manufacturing Corp. - Syosset, NY
Dorman Products - Warsaw, KY
Durimex, Inc. - Orange, CA
J-Mak Industries, Inc. - Columbus, OH

E. Switches (contd.)

Littlefuse, Inc. - Des Plaines, IL
Mr. Gasket Company - Cleveland, OH
Peterson Manufacturing - Grandview, MO
Unikent Corporation - Taipei, Taiwan
Wells Mfg. Corp. - Fond du Lac, WI.
Zenith Ignition, Inc. - Totowa, NJ

F. Terminals

Blazer Int'l Corp. - Franklin Park, IL
Calterm, Inc. - El Cajon, CA
Dorman Products - Warsaw, KY
East Penn Mfg. Co., Inc. - Lyon Station, PA
J-Mak Industries, Inc. - Columbus, OH
Mize and Co. Inc. - Kingman, KS
Noco Company - Cleveland, OH
Poli-Auto Inc. - Miami, FL
Web Wire & Cable Mfg. Co. - Miami, FL
Wells Mfg. Corp. - Fond du Lac, WI.

G. Wire

Calterm, Inc. - El Cajon, CA
Federal Parts Corp. - Dallas, TX
Hopkins Manufacturing Corp. - Emporia, KS
Mize and Co. Inc. - Kingman, KS
Noco Company - Cleveland, OH
Web Wire & Cable Mfg. Co. - Miami, FL
Wells Mfg. Corp. - Fond du Lac, WI

Emission Control System Components

Champion Laboratories Inc. - Albion, IL
Cobraline Manufacturing Corp. - Syosset, NY
Echlin/Auto-Tune - Franklin Park, IL
Motorcraft (Ford) - Dearborn, MI
Motormite Manufacturing - Colmar, PA
Products for Power - Addison, IL
Saginaw Industries Inc. - Chicago, IL
South Oakland Industries - Pontiac, MI
Tomco Inc. - St. Louis, MO
Wells Mfg. Corp. - Fond du Lac, WI
Zenith Ignition, Inc. - Totowa, NJ

Engine Hard Parts

China National Auto Industry - Beijing, China
Dayco Products Inc. - Dayton, OH
Dimension Decor Inc. - Monclovia, OH
Evergreen Automobiles - Delhi, India
Hastings Mfg. Company - Hastings, MI
Hayden Inc. - Corona, CA
Interamerican Trade Corp. - Dayton, OH
Pirelli Power Transmission - Red Wing, MN

Engine Hard Parts (contd.)

Qualitee International Parts - Richmond, VA
Saginaw Industries Inc. - Chicago, IL
Standard Gasket - Chicago, IL
Yale Engineering Company - Chicago, IL

Exhaust System Components

Aristo-Craft Inc. - Romeo, MI
Byrne Associates - Buena Park, CA
China National Auto Industry - Beijing, China
Crager Wheel & Exhaust Div. - Cleveland, OH
Dorman Products - Warsaw, KY
Hong Kong Trade Devel. - Chicago, IL
Hunting Specialty Prods, Inc. - Lebanon, OH
Maremont Exhaust Prod Inc. - Carol Stream, IL
Metallic Ceramic Coat, Inc. - Bridgeport, PA
Mr. Gasket Company - Cleveland, OH
Perfection Auto Products - Livonia, MI
Products for Power - Addison, IL
Qualco Products Company - Fanwood, NJ
Rol Manufacturing - Oviedo, FL
South Oakland Industries - Pontiac, MI
Standard Gasket - Chicago, IL
Superior Industries - Van Nuys, CA
Victor Auto Prods, Inc. - Des Plaines, IL
Yale Engineering Company - Chicago, IL

Fender Flares, Spoilers

Chuan Hseng Co., Ltd. - Taipei, Taiwan
G.T. Styling, Inc. - Costa Mesa, CA
Highland Group Ind. L.P. - Cleveland, OH
J.S. Parker International Ltd. - Ontario, Canada
Lund Industries - Minneapolis, MN
Pacer Performance Prods. - Los Angeles, CA
Poli-Auto Inc. - Miami, FL
Powerflow, Inc. - Buffalo, NY
Priority Precision Products - Westbury, NY
Wang's International Inc. - Baldwin Park, CA
Wolf Automotive - Santa Ana, CA
Yih Tair Industrial Co., Ltd. - Taiwan

Filters: Gas, Air, Oil, etc.

AC - Delco - Detroit, MI
Cam2 Oil Products Company - New Britain, PA
Camel Products - Muskogee, OK
Champion Laboratories Inc. - Albion, IL
China National Auto Industry - Beijing, China
Citgo Petroleum Corp. - Tulsa, OK
Cobraline Manufacturing Corp. - Syosset, NY
First Brands Corporation - Danbury, CT

Filters: Gas, Air, Oil, etc. (contd.)

Hastings Mfg. Company - Hastings, MI
Interamerican Trade Corp. - Dayton, OH
MPA (Moto Parts & Acc.) - Santa Fe Spring, CA
Make Waves Inst. Corp. - Williamsport, NY
Master Parts - Fairfield, IL
Motorcraft (Ford) - Dearborn, MI
Mr. Gasket Company - Cleveland, OH
Pennzoil Products Company - Houston, TX
Phillips 66 Company - Bartlesville, OK
Poli-Auto Inc. - Miami, FL
Purolator Products/Facet - Tulsa, OK
Quaker State Corporation - Oil City, PA
Qualitee International Parts - Richmond, VA
Saginaw Industries, Inc. - Chicago, IL
Texaco Lubricants Company - Houston, TX
Tomco Inc. - St. Louis, MO
Valvoline Oil Company - Lexington, KY
Zenith Ignition, Inc. - Totowa, NJ

Fire Extinguishers

China National Auto Industry - Beijing, China
First Alert - Aurora, IL
Kidde Inc. - Mebane, NC
Sentry Pack - Westbury, CT

Fuel System Components

Echlin/Auto-Tune - Franklin Park, IL
Epicor Industries, Inc. - Deerfield, IL
Evergreen Automobiles - Delhi, India
Hastings Mfg. Company - Hastings, MI
Lifetime Automotive Products - Dallas, TX
Master Parts - Fairfield, IL
Motorad of America - Niagara Falls, NY
Motorcraft (Ford) - Dearborn, MI
Motormite Manufacturing - Colmar, PA
Poli-Auto Inc. - Miami, FL
Premium Auto Tanks USA - Rockwood, MI
Purolator Products/Facet - Tulsa, OK
Tomco Inc. - St. Louis, MO
Wells Mfg. Corp. - Fond du Lac, WI

Gaskets, Seals

Alloy Industries, Inc. - Chicago, IL
China National Auto Industry - Beijing, China
Escort Seal Co. Ltd. - Taipei, Taiwan
Green Ball Bearing Co. - Cleveland, OH
Harvey Westbury Corporation - Westbury, NY
Loctite Corporation - Cleveland, OH
Make Waves Inst. Corp. - Williamsport, NY

Gaskets, Seals (contd.)

Motorad of America - Niagara Falls, NY
Mr. Gasket Company - Cleveland, OH
Radiator Specialty Co. - Charlotte, NC
Rol Manufacturing - Oviedo, FL
Saginaw Industries, Inc. - Chicago, IL
Seal-Rite/Auto Insulation, Inc. - Mt. Holly, NJ
Standard Gasket - Chicago, IL
Taylor Made Products Co. - Macedonia, OH

Gauges

Actron Mfg. Company - Cleveland, OH
Altus Technology Corp. - Minnetonka, MN
Camel Products - Muskogee, OK
Cowealth Precision Co. - Taipai Hsien, Taiwan
Custom Accessories - Niles, IL
Equus Products, Inc. - Fountain Valley, CA
Hastings Mfg. Company - Hastings, MI
Jin Dai Auto Supplies Co. Ltd. - Taiwan
Make Waves Inst. Corp. - Williamsport, NY
Poli-Auto Inc. - Miami, FL
Polin Electric Ind. Co. Ltd. - Keelung, Taiwan
Victor Auto Prods, Inc. - Des Plaines, IL

Glazing: Windows, Window Film

Alpena/Marklyn Co. Inc. -
Altawood Aerosols - Upland, CA
Clear Star Products - Richmond Hill, NY
L.M.I./Sunup - Buena Park, CA
Loctite Corporation - Cleveland, OH
Luverne Products - Brandon, SD
Metallized Products - St. Petersburg, FL
Prestige Aluminum Products - Montclair, PA
Rubber Queen - Dublin, OH
Sparkomatic Corporation - Milford, PA
VHT & Sperex Company - Gardena, CA

Hand Tools/Power Tools

Ace Hardware Supplies - Central, Hong Kong
Alden Corporation - Wolcott, CT
Allied International - Sylmar, CA
American Products, Inc. - Springfield, MO
Amsco Tools - Moonachie, NJ
Barjan Products - East Moline, IL
Bondo Consumer Products Div. - Atlanta, GA
Buffalo Tool Corp. - St. Louis, MO
Calterm, Inc. - El Cajon, CA
Camel Products - Muskogee, OK
Chieftain Auto Products - N. Augusta, SC
China National Auto Industry - Beijing, China

Hand Tools/Power Tools (contd.)

Coido Corporation - Taipei, Taiwan
Collaborate Industries - Kowloon, Hong Kong
Custom Accessories - Niles, IL
Denco Incorporated - Salt Lake City, UT
DHC Specialty Corp. - Taipei, Taiwan
Dremel - Racine, WI
Durimex, Inc. - Orange, CA
First Jefferson Tool Inc. - Paramount, CA
Flotool International - Santa Ana, CA
G.H. Meiser & Co. - Posen, IL
GC - Thorsen - Rockford, IL
Great Neck Saw - Mineola, NY
Harvey Westbury Corporation - Westbury, NY
Hastings Mfg. Company - Hastings, MI
Hi-Lift Jack Company - Bloomfield, IN
Hong Kong Trade Devel. - Chicago, IL
Hopkins Manufacturing Corp. - Emporia, KS
Intermark World Prod./Swirlon - Kenilworth, IL
Intermarket, Inc. - Guilderland, NY
International Tool Box Corp. - Aurora, IL
Kastar Inc. - Racine, WI
Kentledge Co. Ltd. - Taipei, Taiwan
Lisle Corporation - Clarinda, CA
Lubrimatic Products Division - Olathe, KS
Marson Corporation - Chelsea, MA
Midwest Can Company - Franklin Park, IL
Motormite Manufacturing - Colmar, PA
NTY International - S. Plainfield, NJ
Olympia Tools - Azusa, CA
Petersen Automotive Corp. - Freedonia, WI
Poli-Auto Inc. - Miami, FL
Polin Electric Ind. Co. Ltd. - Keelung, Taiwan
Rally Mag Products - Newport Beach, CA
Schauer Manufacturing Co. - Cincinnati, OH
Seaboard Marine, Inc. - Kenner, LA
Sentry Pack - Westbury, CT
Tempcon AB - Sweden
Transtar Tools Inc. - Bell Gardens, CA
Victor Auto Prods, Inc. - Des Plaines, IL
Wen Products, Inc. - Chicago, IL
Wilmar Corporation - Seattle, WA

Hardware/Fasteners - Nuts, Bolts, etc.

Alden Corporation - Wolcott, CT
Alpena/Marklyn Co. Inc.
Buffalo Tool Corp. - St. Louis, MO
Calterm, Inc. - El Cajon, CA

Hardware/Fasteners - Nuts, Bolts, etc. (contd.)

Chamberlain Group (Waxcoa) - Elmhurst, IL
 Chieftain Auto Products - N. Augusta, SC
 Cruiser Accessories - Torrance, CA
 Dorman Products - Warsaw, KY
 Highland Group Ind. L.P. - Cleveland, OH
 Maremont Exhaust Prod Inc. - Carol Stream, IL
 Marson Corporation - Chelsea, MA
 Metallic Ceramic Coat, Inc. - Bridgeport, PA
 Motormite Manufacturing - Colmar, PA
 Mr. Gasket Company - Cleveland, OH
 Newark Auto Products - West Orange, NJ
 Penguin Automotive Mfg., Inc. - Reading, PA
 Products for Power - Addison, IL
 Rubber Queen - Dublin, OH
 Security Chain Company - Portland, OR
 South Oakland Industries - Pontiac, MI
 Tridon Inc. - Smyrna, TN

Helmets

Ertl Company - Dyersville, IA

High Performance Products

AC - Delco - Detroit, MI
 Annton Research - Corona, CA
 Blazer Int'l Corp. - Franklin Park, IL
 Chuan Hseng Co., Ltd. - Taipei, Taiwan
 Crager Wheel & Exhaust Div. - Cleveland, OH
 Dorman Products - Warsaw, KY
 Equus Products, Inc. - Fountain Valley, CA
 Hong Kong Trade Devel. - Chicago, IL
 Mag Instrument Company - Ontario, CA
 Maremont Exhaust Prod Inc. - Carol Stream, IL
 MCI-Mach Components, Inc. - St. Charles, IL
 Mr. Gasket Company - Cleveland, OH
 Nationwide Industries, Inc. - Durham, NC
 Tomco Inc. - St. Louis, MO

Horns

Alpex Manufacturing Company - Omaha, NE
 Anes Security, Inc. - Irvine Del Rey, CA
 Chieftain Auto Products - N. Augusta, SC
 China National Auto Industry - Beijing, China
 Make Waves Inst. Corp. - Williamsport, NY
 Poli-Auto Inc. - Miami, FL
 Unikent Corporation - Taipei, Taiwan
 Wolo Manufacturing Corporation

Hub Caps

American Automotive Mktg. - Holbrook, NY
 Concord Wheelware Inc. - Santa Fe Spring, CA

Hub Caps (contd.)

Del Met Corporation - Hendersonville, TN
 I.M.I./Sunup - Buena Park, CA
 Make Waves Inst. Corp. - Williamsport, NY
 Mr. Gasket Company - Cleveland, OH
 Priority Precision Products - Westbury, NY
 Wang's International Inc. - Baldwin Park, CA
 Wilmar Corporation - Seattle, WA

Ignition System Components

3M Company - St. Paul, MN
 Automotive Enterprises - Passaic, NJ
 Carol Cable Company, Inc. - Pawtucket, RI
 China National Auto Industry - Beijing, China
 Cobraline Manufacturing Corp. - Syosset, NY
 East-West International Co. - Whippany, NJ
 Echlin/Auto-Tune - Franklin Park, IL
 Evergreen Automobiles - Delhi, India
 Federal Parts Corp. - Dallas, TX
 Goodway Int'l, Inc. - Mercer Island, WA
 Hong Kong Trade Devel. - Chicago, IL
 Interamerican Trade Corp. - Dayton, OH
 J-Mak Industries, Inc. - Columbus, OH
 MPA (Moto Parts & Acc.) - Santa Fe Spring, CA
 Midtronics, Inc. - Blue Island, IL
 Motorcraft (Ford) - Dearborn, MI
 Mr. Gasket Company - Cleveland, OH
 Nippodenso of LA Inc. - Long Beach, CA
 Old World Auto Prd/Peak - Northbrook, IL
 Saginaw Industries, Inc. - Chicago, IL
 Web Wire & Cable Mfg Co. - Miami, FL
 Wells Mfg. Corp. - Fond du Lac, WI
 Zenith Ignition, Inc. - Totowa, NJ

A. Distributor Caps

Automotive Enterprises - Passaic, NJ
 Cobraline Manufacturing Corp. - Syosset, NY
 Echlin/Auto-Tune - Franklin Park, IL
 Evergreen Automobiles - Delhi, India
 Motorcraft (Ford) - Dearborn, MI
 Wells Mfg. Corp. - Fond du Lac, WI
 Zenith Ignition, Inc. - Totowa, NJ

B. Electronic Control Modules

Automotive Enterprises - Passaic, NJ
 Cobraline Manufacturing Corp. - Syosset, NY
 Echlin/Auto-Tune - Franklin Park, IL
 Goodway Int'l, Inc. - Mercer Island, WA
 Midtronics, Inc. - Blue Island, IL
 Motorcraft (Ford) - Dearborn, MI

B. Electronic Control Modules (contd.)

Wells Mfg. Corp. - Fond du Lac, WI.
Zenith Ignition, Inc. - Totowa, NJ

C. Ignition Coils

Automotive Enterprises - Passaic, NJ
China National Auto Industry - Beijing, China
Cobraline Manufacturing Corp. - Syosset, NY
Echlin/Auto-Tune - Franklin Park, IL
Goodway Int'l, Inc. - Mercer Island, WA
Motorcraft (Ford) - Dearborn, MI
Wells Mfg. Corp. - Fond du Lac, WI
Zenith Ignition, Inc. - Totowa, NJ

D. Ignition Switches

China National Auto Industry - Beijing, China
Cobraline Manufacturing Corp. - Syosset, NY
Echlin/Auto-Tune - Franklin Park, IL
J-Mak Industries, Inc. - Columbus, OH
Motorcraft (Ford) - Dearborn, MI
Wells Mfg. Corp. - Fond du Lac, WI.
Zenith Ignition, Inc. - Totowa, NJ

E. Spark Plugs

AC - Delco - Detroit, MI
China National Auto Industry - Beijing, China
Hong Kong Trade Devel. - Chicago, IL
Motorcraft (Ford) - Dearborn, MI
Nippondenso of LA Inc. - Long Beach, CA
Old World Auto Prd./Peak - Northbrook, IL

F. Spark Plug Wires

Automotive Enterprises - Passaic, NJ
Carol Cable Company, Inc. - Pawtucket, RI
Cobraline Manufacturing Corp. - Syosset, NY
Echlin/Auto-Tune - Franklin Park, IL
Federal Parts Corp. - Dallas, TX
Interamerican Trade Corp. - Dayton, OH
(Motorcar Parts & Acc.) - Santa Fe Springs, CA
Motorcraft (Ford) - Dearborn, MI
Web Wire & Cable Mfg. Co. - Miami, FL
Wells Mfg. Corp. - Fond du Lac, WI.
Zenith Ignition, Inc. - Totowa, NJ

G. Other Ignition Components

Cobraline Manufacturing Corp. - Syosset, NY
Echlin/Auto-Tune - Franklin Park, IL
Goodway Int'l, Inc. - Mercer Island, WA
Motorcraft (Ford) - Dearborn, MI
Mr. Gasket Company - Cleveland, OH
Wells Mfg. Corp. - Fond du Lac, WI.
Zenith Ignition, Inc. - Totowa, NJ

Import Car Parts

Bonatrade International, Inc. - Santa Ana, CA
Carol Cable Company, Inc. - Pawtucket, RI
China National Auto Industry - Beijing, China
Cobraline Manufacturing Corp. - Syosset, NY
Echlin/Auto-Tune - Franklin Park, IL
Evergreen Automobiles - Delhi, India
Green Ball Bearing Co. - Cleveland, OH
Hastings Mfg. Company - Hastings, MI
Maremont Exhaust Prod Inc. - Carol Stream, IL
Master Parts - Fairfield, IL
MCI Automotive Products - Chicago, IL
MCI-Mach. Components, Inc. - St. Charles, IL
Mita Corp. - Tokyo, Japan
Mr. Gasket Company - Cleveland, OH
Newark Auto Products - West Orange, NJ
Qualitee International Parts - Richmond, VA
Web Wire & Cable Mfg. Co. - Miami, FL
Wells Mfg. Corp. - Fond du Lac, WI.

Inventory Control Systems

IBM - White Plains, NY
ICAS Computer Systems Inc. - Dover, NJ
S.A.S.I. - Bensalem, PA
Triad Systems - Livermore, CA
Ultimate Inventory Solutions - Parsippany, NJ

Lifting Equipment

Allied International - Sylmar, CA
Buffalo Tool Corp. - St. Louis, MO
Chieftain Auto Products - N. Augusta, SC
Collaborate Industries - Kowloon, Hong Kong
Custom Accessories - Niles, IL
First Jefferson Tool Inc. - Paramount, CA
Harvey Westbury Corporation - Westbury, NY
Hastings Mfg. Company - Hastings, MI
Hi-Lift Jack Company - Bloomfield, IN
Hunter Engineering Co. - Bridgeton, MO
Intermarket, Inc. - Guilderland, NY
Kar Rite International - Franklin Park, IL
Olympia Tools - Azusa, CA
Petersen Automotive Corp. - Freedonia, WI
Shinn Fu Co. of America - Kansas City, MO
Transtar Tools Inc. - Bell Gardens, CA
Tru-Cut Automotive - Salem, OH
Wilmar Corporation - Seattle, WA

Litter Baskets, Containers

Allied Plastics Inc. - Gastonia, NC
Allison Corporation - Livingston, NJ

Litter Baskets, Containers (contd.)

Classic Accessories - Seattle, WA
Eppco Enterprises, Inc. - Cleveland, OH
H & L Products, Inc. - National City, CA
Jasco, Inc. - Emporia, KS
Marlenn Corporation - Baltimore, MD
Monoflo International Inc. - Cedarhurst, NY
Posit-Plus, Inc. - Monrovia, CA
Rubber Queen - Dublin, OH
Rubbermaid Specialty Prods. - Smithville, OH
Talus Corp. - Portland, ME
Texas Saddlebags Inc. - Grand Prairie, TX

Louvers, Sunshades

Ace Hardware Supplies - Central, Hong Kong
Allison Corporation - Livingston, NJ
Auto-Shade Inc. - North Hollywood, CA
Auto-Sun-Shade - Hialeah, FL
China National Auto Industry - Beijing, China
Custom Accessories - Niles, IL
Deflecta-Shield Corporation - Urbandale, IA
G.T. Styling, Inc. - Costa Mesa, CA
Gem Mfg. Company, Inc. - Chicago, IL
Highland Group Ind. L.P. - Cleveland, OH
Kar Rite International - Franklin Park, IL
Lund Industries - Minneapolis, MN
Mr. Gasket Company - Cleveland, OH
Pardners Unlimited - Tulsa, OK
Poli-Auto Inc. - Miami, FL
Posit-Plus, Inc. - Monrovia, CA
Priority Precision Products - Westbury, NY
Rally Manufacturing, Inc. - Miami, FL
Seville Classics - Gardena, CA
Shady Business, Inc. - Rancho Cucamonga, CA
Tag Express - Duluth, GA
The Shade - Cocoa, FL

Lubricants, Motor Oil

A. Grease

AGS Company - Muskegon, MI
Amoco Oil Company - Oak Brook, IL
Bell Additives, Inc. - Longwood, FL
Berkebile Oil Co., Inc. - Somerset, PA
Breslube - Chicago, IL
Cam2 Oil Products Company - New Britain, PA
Citgo Petroleum Corp. - Tulsa, OK
Coastal Unilube, Inc. - West Memphis, AR
Cyclo Automotive Products - Lake Park, FL
Exxon Company, USA - Houston, TX

A. Grease (contd.)

Kendall Refining Company - Bradford, PA
KP Industries - Dallas, TX
Lubrimatic Products Division - Olathe, KS
National Interchem, Corp. - Chicago, IL
Nationwide Industries, Inc. - Durham, NC
Panef Corporation - Milwaukee, WI
Pennzoil Products Company - Houston, TX
Phillips 66 Company - Bartlesville, OK
Quaker State Corporation - Oil City, PA
Qualco Products Company - Fanwood, NJ
Radiator Specialty Co. - Charlotte, NC
Sun Refining & Mktg Co. - Philadelphia, PA
Taylor Made Products Co. - Macedonia, OH
Technical Chemical Company - Dallas, TX
Texaco Lubricants Company - Houston, TX

B. Wheel Bearing Grease

AGS Company - Muskegon, MI
Amoco Oil Company - Oak Brook, IL
Breslube - Chicago, IL
Cam2 Oil Products Company - New Britain, PA
Kendall Refining Company - Bradford, PA
Lubrimatic Products Division - Olathe, KS
Pennzoil Products Company - Houston, TX
Phillips 66 Company - Bartlesville, OK
Quaker State Corporation - Oil City, PA

C. General Purpose Oil

AGS Company - Muskegon, MI
Altawood Aerosols - Upland, CA
Amoco Oil Company - Oak Brook, IL
Breslube - Chicago, IL
Cam2 Oil Products Company - New Britain, PA
Chevron Chemical Co. - San Ramon, CA
Epicor Industries, Inc. - Deerfield, IL
K & W Products - Bell Gardens, CA
Kendall Refining Company - Bradford, PA
Marvel Oil Company - Port Chester, NY
Panef Corporation - Milwaukee, WI
Pennzoil Products Company - Houston, TX
Phillips 66 Company - Bartlesville, OK
QMI, Inc. - Lakeland, FL
Qualco Products Company - Fanwood, NJ
Radiator Specialty Co. - Charlotte, NC
Specialty Oil Company Inc. - Shreveport, LA
Sun Refining & Mktg. Co. - Philadelphia, PA
William K. Westley Co. - Garfield Heights, OH

D. Motor Oil

Amoco Oil Company - Oak Brook, IL
Breshube - Chicago, IL
Cam2 Oil Products Company - New Britain, PA
Castrol Inc. - Wayne, NJ
Citgo Petroleum Corp. - Tulsa, OK
Coastal Unilube, Inc. - West Memphis, AR
Conoco, Inc. - Houston, TX
Evergreen Oil, Inc. - Irvine, CA
Exxon Company, USA - Houston, TX
First Brands Corporation - Danbury, CT
Flotool International - Santa Ana, CA
Hilton Oil Corporation - Bellevue, WA
Kendall Refining Company - Bradford, PA
Mobil Oil Corporation - Fairfax, VA
Motorcraft (Ford) - Dearborn, MI
Oilmate Industries Ltd. - Saskatoon, Canada
Pennzoil Products Company - Houston, TX
Phillips 66 Company - Bartlesville, OK
Pitt Penn Oil Co. - Creighton, PA
QMI, Inc. - Lakeland, FL
Quaker State Corporation - Oil City, PA
Shaler Company - Waupun, WI
Specialty Oil Company, Inc. - Shreveport, LA
Sun Refining & Mktg. Co. - Philadelphia, PA
Technical Chemical Company - Dallas, TX
Texaco Lubricants Company - Houston, TX
Valvoline Oil Company - Lexington, KY

E. Penetrating Oil

AGS Company - Muskegon, MI
Altawood Aerosols - Upland, CA
Berkebile Oil Co., Inc. - Somerset, PA
Cam2 Oil Products Company - New Britain, PA
Chevron Chemical Co. - San Ramon, CA
Coastal Unilube, Inc. - West Memphis, AR
First Brands Corporation - Danbury, CT
Harvey Westbury Corporation - Westbury, NY
K & W Products - Bell Gardens, CA
Klinview - Irvine, CA
Loctite Corporation - Cleveland, OH
Marvel Oil Company - Port Chester, NY
Mega Power Inc. - Clearwater, FL
Nationwide Industries, Inc. - Durham, NC
Panef Corporation - Milwaukee, WI
Pennzoil Products Company - Houston, TX
Plasti-Kote Company, Inc. - Medina, OH
Quaker State Corporation - Oil City, PA

E. Penetrating Oil (contd.)

Qualco Products Company - Fanwood, NJ
Radiator Specialty Co. - Charlotte, NC
Technical Chemical Company - Dallas, TX
WD-40 Company - San Diego, CA
William K. Westley Co. - Garfield Heights, OH

F. Other Lubricants

AGS Company - Muskegon, MI
Alemite CD-2 Company - Prospect, IL
Altawood Aerosols - Upland, CA
Annton Research - Corona, CA
Bardahl Manufacturing Corp. - Seattle, WA
Berkebile Oil Co., Inc. - Somerset, PA
Blue Coral, Inc. - Cleveland, OH
Cam2 Oil Products Company - New Britain, PA
Champion Packaging & Dist. - Lombard, IL
Chevron Chemical Co. - San Ramon, CA
Citgo Petroleum Corp. - Tulsa, OK
Coastal Unilube, Inc. - West Memphis, AR
Conoco, Inc. - Houston, TX
Cyclo Automotive Products - Lake Park, FL
Exxon Company, USA - Houston, TX
Harvey Westbury Corporation - Westbury, NY
Hastings Mfg. Company - Hastings, MI
K & W Products - Bell Gardens, CA
Kafko International Ltd. - Chicago, IL
Kendall Refining Company - Bradford, PA
KP Industries - Dallas, TX
Mr. Gasket Company - Cleveland, OH
Octane Boost Corporation - Dallas, TX
Panef Corporation - Milwaukee, WI
Phillips 66 Company - Bartlesville, OK
Pitt Penn Oil Co. - Creighton, PA
Radiator Specialty Co. - Charlotte, NC
Restore Inc. - Ft. Lauderdale, FL
Ronson Cons. Pros Corp. - Somerset Park, NJ
Scott Paper Company - Philadelphia, PA
Shaler Company - Waupun, WI
Specialty Oil Company, Inc. - Shreveport, LA
Sun Refining & Mktg. Co. - Philadelphia, PA
Taylor Made Products Co. - Macedonia, OH
Texaco Lubricants Company - Houston, TX
Valvoline Oil Company - Lexington, KY
William K. Westley Co. - Garfield Heights, OH
Wynn Oil Company - Azusa, CA
Yale Engineering Company - Chicago, IL

Mat: Car, Truck, Floor

Ace Hardware Supplies - Central, Hong Kong
Allison Corporation - Livingston, NJ
Car-Maid, Inc. - Zion, IL
Carrand Companies, Inc. - Gardena, CA
Century Accessories, Inc. - Calhoun, GA
Creative Weaving Company - Greer, SC
Dashmat Company - Phoenix, AZ
Elegant Industries, Inc. - Elizabeth, NJ
F.P. Feature Prods. - Rolling Meadows, IL
H & A Enterprise Co., Ltd. - Tainan, Taiwan
I.M.I./Sunup - Buena Park, CA
Jefferson Industries - Chicago, IL
Kool Kooshion Industries - Memphis, TN
Mat World, Inc. - Portsmouth, OH
Newark Auto Products - West Orange, NJ
Poli-Auto Inc. - Miami, FL
Posit-Plus, Inc. - Monrovia, CA
Rally Manufacturing, Inc. - Miami, FL
Remington Industries, Inc. - Benton, TN
Rubber Queen - Dublin, OH
Saddleman Inc. - Logan, UT
Sagaz Industries - Miami, FL
Sperling Enterprises Pty., Ltd. - Australia
Superior Industries - Van Nuys, CA
Unikent Corporation - Taipei, Taiwan
Wolf Automotive - Santa Ana, CA

Mechanics' Tools, Tool Boxes

Alden Corporation - Wolcott, CT
China National Auto Industry - Beijing, China
Contico Automotive - St. Louis, MO
Delta Consolidated Industries - Jonesboro, AR
Denco Incorporated - Salt Lake City, UT
Flotool International - Santa Ana, CA
Hastings Mfg. Company - Hastings, MI
International Tool Box Corp. - Aurora, IL
Lisle Corporation - Clarinda, CA
Mag Instrument Company - Ontario, CA
Monoflo International Inc. - Cedarhurst, NY
P & B Manufacturing Co. - Deptford, NJ
Petersen Automotive Corp. - Freedonia, WI
Poli-Auto Inc. - Miami, FL
R.E.L. Products, Inc. - Van Buren, AR
Rubber Queen - Dublin, OH
Seaboard Marine, Inc. - Kenner, LA
Sentry Pack - Westbury, CT
Tru-Cut Automotive - Salem, OH

Mechanics' Tools, Tool Boxes (contd.)

Whiteside Mfg. Co., Inc. - Delaware, OH

Mirrors

Ace Hardware Supplies - Central, Hong Kong
Allison Corporation - Livingston, NJ
Barjan Products - East Moline, IA
Blazer Int'l Corp. - Franklin Park, IL
China National Auto Industry - Beijing, China
CIPA - USA - Port Huron, MI
Custom Accessories - Niles, IL
Epicor Industries, Inc. - Deerfield, IL
K-D Lamp Company - Cincinnati, OH
Lanechanger Inc. - Aylmer, Canada
Make Waves Inst. Corp. - Williamsport, NY
Molor Products Company - Naperville, IL
Mr. Gasket Company - Cleveland, OH
Peterson Manufacturing - Grandview, MO
Poli-Auto Inc. - Miami, FL
Rally Manufacturing, Inc. - Miami, FL
Unikent Corporation - Taipei, Taiwan
Wang's International Inc. - Baldwin Park, CA
Wilmar Corporation - Seattle, WA

Mobile Cellular Phone

Audiovox Corporation - Hauppauge, NY

Motorcycle/Moped Parts & Accessories

Ace Hardware Supplies - Central, Hong Kong
American Products, Inc. - Springfield, MO
Annton Research - Corona, CA
China National Auto Industry - Beijing, China
Covercraft Industries, Inc. - Chatsworth, CA
Cruiser Accessories - Torrance, CA
Dorcy Motorcycle Prods Div. - Columbus, OH
Driver Design/National Cycle - Maywood, IL
Flotool International - Santa Ana, CA
K-D Lamp Company - Cincinnati, OH
Littlefuse, Inc. - Des Plaines, IL
Philips Lighting Company - Somerset, NJ
Superwinch Inc. - Putnam, CT
Unelko Corporation - Scottsdale, AZ

Novelties, Ornaments, Keychains

Allison Corporation - Livingston, NJ
Barjan Products - East Moline, IL
California Innovations Inc. - Ontario, Canada
Chroma Graphics, Inc. - Alcoa, TN
Classic Accessories - Seattle, WA
Fremont Die Consumer Products - Chicago, IL
Gem Mfg. Company, Inc. - Chicago, IL

Novelties, Ornaments, Keychains (contd.)

Gems of the Golden West - San Francisco, CA
 Glenncraft Corporation - Providence, RI
 H & L Products, Inc. - National City, CA
 Hampton Products - Irvine, CA
 Kandidops - Longwood, FL
 Molor Products Company - Naperville, IL
 National Banner Co. - Dallas, TX
 Qualco Products Company - Fanwood, NJ
 Rally Manufacturing, Inc. - Miami, FL
 Sea Stuff, Inc. - Cocoa, FL
 Seville Classics - Gardena, CA
 Shou Ie Enterprise Co., Ltd. - Taipei, Taiwan
 Tag Express - Duluth, GA
 Talus Corp. - Portland, ME
 Ultra Hot Graphics, Inc. - Conroe, TX

Off Road Components

Ace Hardware Supplies - Central, Hong Kong
 Blazer Int'l Corp. - Franklin Park, IL
 California Innovations Inc. - Ontario, Canada
 Crager Wheel & Exhaust Div. - Cleveland, OH
 Deflecta-Shield Corp. - Urbandale, IA
 Denco Incorporated - Salt Lake City, UT
 Hi-Lift Jack Company - Bloomfield, IN
 Keeper Corporation - Willimantic, CT
 Mag Instrument Company - Ontario, CA
 Make Waves Inst. Corp. - Williamsport, NY
 Mr. Gasket Company - Cleveland, OH
 Nationwide Industries, Inc. - Durham, NC
 Newark Auto Products - West Orange, NJ
 Pacer Performance Prods. - Los Angeles, CA
 Peterson Manufacturing - Grandview, MO
 Ramsey Winch Company - Tulsa, OK
 Rubber Queen - Dublin, OH
 Superior Industries - Van Nuys, CA
 Superwinch, Inc. - Putnam, CT
 Wolf Automotive - Santa Ana, CA

Paints, Enamels, Lacquers

3M Company - St. Paul, MN
 Altawood Aerosols - Upland, CA
 Bondo Consumer Products Div. - Atlanta, GA
 Devcon Consumer Division - Wood Dale, IL
 Hunting Specialty Prods, Inc. - Lebanon, OH
 Krylon/Dupli-Color - Solon, OH
 Marson Corporation - Chelsea, MA
 Noco Company - Cleveland, OH
 Plasti-Kote Company, Inc. - Medina, OH

Paints, Enamels, Lacquers (contd.)

Solv-o Corporation - Taylor, MI
 Talsol Corporation/Mar-Hyde - Cincinnati, OH
 Taylor Made Products Co. - Macedonia, OH
 VHT & Sperex Company - Gardena, CA

Personal Items: Road Maps, Sunglasses, Clothing

Ace Hardware Supplies - Central, Hong Kong
 American Drivers Div. - Elk Grove Village, IL
 Barjan Products - East Moline, IL
 Budge Industries, Inc. - Pennsauken, NJ
 China National Auto Industry - Beijing, China
 Classic Accessories - Seattle, WA
 Ertl Company - Dyersville, IA
 H & L Products, Inc. - National City, CA
 K-Products, Inc. - Orange City, IA
 Kandidops - Longwood FL
 Koolatron - Raywares - Ontario, Canada
 Mag Instrument Company - Ontario, CA
 Mobil Oil Corporation - Fairfax, VA
 NFL Properties, Inc. - New York, NY
 Penguin Automotive Mfg., Inc. - Reading, PA
 Rally Manufacturing, Inc. - Miami, FL
 Rally-Mag Products - Newport Beach, CA
 Sentry Pack - Westbury, CT
 Therm Technology Corp. - Grandville, MI
 Ultra Hot Graphics, Inc. - Conroe, TX

Radar Detectors

Audiovox Corporation - Hauppauge, NY
 Kraco Enterprises, Inc. - Compton, CA
 Make Waves Inst. Corp. - Williamsport, NY
 Royal Sound Company - Eatontown, NJ

Repair Manuals

Chilton Book Co. - Radnor, PA
 Do It Right Publishing, Inc. - Van Nuys, CA
 Fey Automotive Products - Irwindale, CA
 Haynes Publications - Newbury Park, CA
 Kook Kooshion Industries - Memphis, TN
 Triangle Productions, Inc. - Glen Allen, CA

Retail/Wholesale Support Services

303 Products Inc. - Redding, CA
 Central Sales Proms, Inc. - Oklahoma City, OK
 Century Manufacturing Co. - Minneapolis, MN
 Consolidated Freightways - Menlo Park, CA
 Ertl Company - Dyersville, IA
 National Banner Co. - Dallas, TX
 Sentry Pack - Westbury, CT
 Transparent Container Co. Inc. - Berkeley, IL

Retail/Wholesale Support Services (contd.)

Zed Industries - Vandalia, OH

Running Boards

Aristo-Craft Inc. - Romeo, MI

Rubber Queen - Dublin, OH

Superior Industries - Van Nuys, CA

R/V & Trailer Equipment

Altawood Aerosols - Upland, CA

American Products, Inc. - Springfield, MO

Annton Research - Corona, CA

Blazer Int'l Corp. - Franklin Park, IL

Bon Aire Industries - Long Beach, CA

Brinkmann Corporation - Dallas, TX

Camco Mfg., Inc. - Greensboro, NC

Covercraft Industries, Inc. - Chatsworth, CA

Denco Incorporated - Salt Lake City, UT

Flotool International - Santa Ana, CA

Green Ball Bearing Co. - Cleveland, OH

Highland Group Ind. L.P. - Cleveland, OH

Hopkins Manufacturing Corp. - Emporia, KS

K-D Lamp Company - Cincinnati, OH

Monoflo International Inc. - Cedarhurst, NY

Perfection Auto Products - Livonia, MI

Peterson Manufacturing - Grandview, MO

Posit-Plus, Inc. - Monrovia, CA

Rubbermaid Specialty Prods. - Smithville, OH

Superior Industries - Van Nuys, CA

Taytronics - St. Peter, MN

The Shade - Cocoa, FL

Therm Technology Corp. - Grandville, MI

Yeu Yeh Enterprise Co. Ltd. - Tempe, AZ

Safety Equipment

3M Company - St. Paul, MN

Aristo-Craft Inc. - Romeo, MI

Bonatrade International, Inc. - Santa Ana, CA

Bungee Int'l Mfg. Corp. - Chatsworth, CA

Cobraline Manufacturing Corp. - Syosset, NY

Crowe Rope Company - Warren, ME

Cube Manufacturing, Inc. - Flushing, MI

Denco Incorporated - Salt Lake City, UT

Designtech International Inc. - Springfield, VA

Henley Chemicals - Montvale, NJ

Hong Kong Trade Devel. - Chicago, IL

Honor Trading, Ltd. - Fremont, CA

Intermark World Prod./Swirlon - Kenilworth, IL

K-D Lamp Company - Cincinnati, OH

Kidde Inc. - Mebane, NC

Safety Equipment (contd.)

KP Industries - Dallas, TX

Mag Instrument Company - Ontario, CA

Molor Products Company - Naperville, IL

Nationwide Industries, Inc. - Durham, NC

Peterson Manufacturing - Grandview, MO

Pylon Mfg. Corp. - Deerfield Beach, FL

Rally Manufacturing, Inc. - Miami, FL

Royal Sound Company - Eatontown, NJ

Sentry Pack - Westbury, CT

Standard Fusee Corp. - Easton, MD

Superior Industries - Van Nuys, CA

Tempcon AB - Sweden

Texas Saddlebags Inc. - Grand Prairie, TX

Unelko Corporation - Scottsdale, AZ

Wilmar Corporation - Seattle, WA

Seats, Seat Covers

Ace Hardware Supplies - Central, Hong Kong

Allison Corporation - Livingston, NJ

Budge Industries, Inc. - Pennsauken, NJ

China National Auto Industry - Beijing, China

Elegant Industries, Inc. - Elizabeth, NJ

Evans Inc. - Venice, CA

F.P. Feature Products - Rolling Meadows, IL

Fredco Enterprises - Lorain, OH

Grant Products - Glendale, CA

Jeluss Mfg., Inc. - Huron, SD

Kool Kooshion Industries - Memphis, TN

Mita Corp. - Tokyo, Japan

Newark Auto Products - West Orange, NJ

Poli-Auto Inc. - Miami, FL

Saddleman Inc. - Logan, UT

Sagaz Industries - Miami, FL

Seville Classics - Gardena, CA

Sperling Enterprises Pty., Ltd. - Australia

Texas Saddlebags Inc. - Grand Prairie, TX

Therm Technology Corp. - Grandville, MI

Unikent Corporation - Taipei, Taiwan

USA/Fashion Magic - Lodi, CA

Security/Alarm Systems

Ace Hardware Supplies - Central, Hong Kong

American Automotive Mktg. - Holbrook, NY

Audiovox Corporation - Hauppauge, NY

Designtech International Inc. - Springfield, VA

First Alert - Aurora, IL

Gorilla Automotive Products - Los Angeles, CA

Grant Products - Glendale, CA

Security/Alarm Systems (contd.)

Hampton Products - Irvine, CA
Hong Kong Trade Devel. - Chicago, IL
Hull Industries - South Euclid, OH
Kraco Enterprises, Inc. - Compton, CA
Leen & Associates - Bellevue, WA
Lifetime Automotive Products - Dallas, TX
McGard, Inc. - Orchard Park, NY
National Security Safe Co. - American Fork, UT
Polin Electric Ind. Co. Ltd. - Keelung, Taiwan
Tech-Cast Mfg. Corp. - Taipei, Taiwan
Tempcon AB - Sweden
Viam Corporation - Carson, CA
Winner International Corp. - Sharon, PA
Wolo Mfg. Corporation - Deer Park, NY
Zemco Group, Inc. - San Ramon, CA

Shoe Equipment: Brake Lathes, Welders, etc.

Alden Corporation - Wolcott, CT
Allied International - Sylmar, CA
Altus Technology Corp. - Minnetonka, MN
Anes Security, Inc. - Irvine Del Rey, CA
Buffalo Tool Corp. - St. Louis, MO
Camel Products - Muskogee, OK
Century Manufacturing Co. - Minneapolis, MN
Chieftain Auto Products - N. Augusta, SC
China National Auto Industry - Beijing, China
Custom Accessories - Niles, IL
Dremel - racine, wi - Racine, WI
Epicor Industries, Inc. - Deerfield, IL
Harvey Westbury Corporation - Westbury, NY
Hastings Mfg. Company - Hastings, MI
Hi-Lift Jack Company - Bloomfield, IN
Hodge Mfg. Co., Inc. - Murfreesboro, TN
Hopkins Manufacturing Corp. - Emporia, KS
Hunter Engineering Co. - Bridgeton, MO
Intermarket, Inc. - Guilderland, NY
International Tool Box Corp. - Aurora, IL
KP Industries - Dallas, TX
MG Industries - Menomonee Falls, WI
Midwest Products, Inc. - Strafford, MO
Olympia Tools - Azusa, CA
Petersen Automotive Corp. - Freedonia, WI
Schauer Manufacturing Co. - Cincinnati, OH
Scott Paper Company - Philadelphia, PA
Tru-Cut Automotive - Salem, OH
Whiteside Mfg. Co., Inc. - Delaware, OH
Wilmar Corporation - Seattle, WA

Shifters

Fremont Die Consumer Products - Chicago, IL
Mr. Gasket Company - Cleveland, OH
Poli-Auto Inc. - Miami, FL
Rally Manufacturing, Inc. - Miami, FL
Wang's International Inc. - Baldwin Park, CA
Wheelskins - Berkeley, CA

Speed Controls

Audiovox Corporation - Hauppauge, NY
Zemco Group, Inc. - San Ramon, CA

Splash Guards

Ace Hardware Supplies - Central, Hong Kong
Custom Accessories - Niles, IL
G-P Manufacturing Company - Chicago, IL
Highland Group Ind. L.P. - Cleveland, OH
Make Waves Inst. Corp. - Williamsport, NY
Mr. Gasket Company - Cleveland, OH
Poli-Auto Inc. - Miami, FL
Powerflow, Inc. - Buffalo, NY
Rally Manufacturing, Inc. - Miami, FL
Rubber Queen - Dublin, OH

Starting System Components

AC - Delco - Detroit, MI
Automotive Enterprises - Passaic, NJ
China National Auto Industry - Beijing, China
Echlin/Auto-Tune - Franklin Park, IL
Evergreen Automobiles - Delhi, India
Leen & Associates - Bellevue, WA
MPA (Moto Parts & Acc.) - Santa Fe Spring, CA
MCI-Mach. Components, Inc. - St. Charles, IL
Schauer Manufacturing Co. - Cincinnati, OH

Steering & Suspension Components

AGS Company - Muskegon, MI
Automotive Enterprises - Passaic, NJ
Buffalo Tool Corp. - St. Louis, MO
China National Auto Industry - Beijing, China
Cofap of America - Dayton, OH
Energy Suspension - San Clemente, CA
Epicor Industries, Inc. - Deerfield, IL
Everco Industries - Melrose Park, IL
Evergreen Automobiles - Delhi, India
Grant Products - Glendale, CA
Green Ball Bearing Co. - Cleveland, OH
Interamerican Trade Corp. - Dayton, OH
Maremont Exhaust Prod Inc. - Carol Stream, IL
Motorcraft (Ford) - Dearborn, MI
Mr. Gasket Company - Cleveland, OH

Steering & Suspension Components (contd.)

Perfection Auto Products - Livonia, MI
Rol Manufacturing - Oviedo, FL
Superior Industries - Van Nuys, CA
Timbren Industries Inc. - Ontario, Canada
Unikent Corporation - Taipei, Taiwan

Store Fixtures

Handy Store Fixtures, Inc. - Newark, NJ

Sun Roofs

American Automotive Mktg. - Holbrook, NY
Aristo-Craft, Inc. - Romeo, MI
Audiovox Corporation - Hauppauge, NY
C.R. Laurence Company Inc. - Los Angeles, CA
China National Auto Industry - Beijing, China
Highland Group Ind. L.P. - Cleveland, OH
I.M.I./Sunup - Buena Park, CA

Tape, Friction, Masking, Stripping

AGS Company - Muskegon, MI
Carrand Companies, Inc. - Gardena, CA
Chroma Graphics, Inc. - Alcoa, TN
Priority Precision Products - Westbury, NY
Qualco Products Company - Fanwood, NJ
Radiator Specialty Co. - Charlotte, NC
Silvatrim Corp. of America - S. Plainfield, NJ
Spartan International, Inc. - Holt, MI
Victor Auto Prods, Inc. - Des Plaines, IL
Yih Tair Industrial Co., Ltd. - Taiwan

Test/Tune Equipment

Actron Mfg. Company - Cleveland, OH
Altus Technology Corp. - Minnetonka, MN
Calterm, Inc. - El Cajon, CA
Chieftain Auto Products - N. Augusta, SC
DHC Specialty Corp. - Taipei, Taiwan
Epicor Industries, Inc. - Deerfield, IL
Equus Products, Inc. - Fountain Valley, CA
Hopkins Manufacturing Corp. - Emporia, KS
Hunter Engineering Co. - Bridgeton, MO.
Lisle Corporation - Clarinda, CA
Make Waves Inst. Corp. - Williamsport, NY
Midtronics, Inc. - Blue Island, IL
New Age International Export - Fort Worth, TX

Tire, Tire Repair Materials, Tubes

Berkebile Oil Co., Inc. - Somerset, PA
Camel Products - Muskogee, OK
Coido Corporation - Taipei, Taiwan
Crager Wheel & Exhaust Div. - Cleveland, OH
Custom Accessories - Niles, IL

Tire, Tire Repair Materials, Tubes (contd.)

Hanna Rubber Co., Inc. - Bell, CA
Measurement Specialties, Inc. - Fairfield, NJ
Midwest Can Company - Franklin Park, IL
Nationwide Industries, Inc. - Durham, NC
Radiator Specialty Co. - Charlotte, NC
Sentry Pack - Westbury, CT

Towing Equipment

Acme Prods. Company, Inc. - Kansas City, MO
American Lock Company - Crete, IL
Aristo-Craft Inc. - Romeo, MI
Erickson Manufacturing Ltd. - Marine City, MI
Fey Automotive Products - Irwindale, CA
Hayden Inc. - Corona, CA
Hopkins Manufacturing Corp. - Emporia, KS
J-Mak Industries, Inc. - Columbus, OH
Ramsey Winch Company - Tulsa, OK
Reese Products - Elkhart, IN
Superwinch, Inc. - Putnam, CT
Yeu Yeh Enterprise Co. Ltd. - Tempe, AZ

Trade Publications

Aftermarket Bus. Magazine - Cleveland, OH
Asian Sources Hardwares - Evanston, IL
Auto Glass Magazine - McLean, VA
Automotive Aftermarket Group - Radnor, PA
Automotive Body Repair News - Radnor, PA
Automotive Marketing - Radnor, PA
Babco Publications - Akron, OH
China Economic News Service - Taipei, Taiwan
Discount Merchandiser - New York, NY
Discount Store News - New York, NY
Do It Right Publishing, Inc. - Van Nuys, CA
Edmund Publications Corp. - Concord, MA
Gem Mfg. Company, Inc. - Chicago, IL
Irving-Cloud Publishing Co. - Lincolnwood, IL
Jobber Retailer - Akron, OH
Meyers Publishing - Van Nuys, CA
Price Stern Sloan Publishers - Los Angeles, CA

Truck Bed Liners/Accessories

Annton Research - Corona, CA
Banyan Industries - Encino, CA
Budge Industries, Inc. - Pennsauken, NJ
Classic Accessories - Seattle, WA
Custom Form Mfg., Inc. - Elkhart, IN
Dashking - Santa Ana, CA
Deflecta-Shield Corp. - Urbandale, IA
Fey Automotive Products - Irwindale, CA

Truck Bed Liners/Accessories (contd.)

H & L Products, Inc. - National City, CA
Hi-Lift Jack Company - Bloomfield, IN
I.M.I./Sunup - Buena Park, CA
Lund Industries - Minneapolis, MN
Pacer Performance Prods. - Los Angeles, CA
Penda Corporation - Portage, WI
Rally Manufacturing, Inc. - Miami, FL
Rubber Queen - Dublin, OH
Rubbermaid Specialty Prods. - Smithville, OH
Rugged Liner - Mt. Braddock, PA
Saddleman Inc. - Logan, UT
SNS Inc. - Topeka, KS
Superior Industries - Van Nuys, CA
Texas Saddlebags Inc. - Grand Prairie, TX
Yih Tair Industrial Co., Ltd. - Taiwan

Truck Parts & Accessories

Airguide Instrument Co. - Buffalo Grove, IL
Annton Research - Corona, CA - Corona, CA
Auto Ventshade Company - Chamblee, GA
Banyan Industries - Encino, CA
Barjan Products - East Moline, IL
Blazer Int'l Corp. - Franklin Park, IL
Calmar Industries - Outlook, Canada
China National Auto Industry - Beijing, China
Classic Accessories - Seattle, WA
Crager Wheel & Exhaust Div. - Cleveland, OH
Custom Form Mfg., Inc. - Elkhart, IN
Denco Incorporated - Salt Lake City, UT
Echlin/Auto-Tune - Franklin Park, IL
Fey Automotive Products - Irwindale, CA
G.T. Styling, Inc. - Costa Mesa, CA
Harvey Westbury Corp. - Westbury, NY
Hebe Company Ltd. - Taipei, Taiwan
Hi-Lift Jack Company - Bloomfield, IN
Highland Group Ind. L.P. - Cleveland, OH
I.M.I./Sunup - Buena Park, CA
Innovative Accessories, Inc. - Norman, OK
Interamerican Trade Corp. - Dayton, OH
Jeluss Mfg., Inc. - Huron, SD
K-D Lamp Company - Cincinnati, OH
Keeper Corporation - Willimantic, CT
Lifetime Automotive Products - Dallas, TX
Lund Industries - Minneapolis, MN
Madera Concepts - Santa Barbara, CA
Mag Instrument Company - Ontario, CA
Make Waves Inst. Corp. - Williamsport, NY

Truck Parts & Accessories (contd.)

Maremont Exhaust Prod Inc. - Carol Stream, IL
Monoflo International Inc. - Cedarhurst, NY
Newark Auto Products - West Orange, NJ
One Grand Products, Inc. - Van Nuys, CA
Pacer Performance Prods. - Los Angeles, CA
Penda Corporation - Portage, WI
Peterson Manufacturing - Grandview, MO
Philips Lighting Company - Somerset, NJ
Poli-Auto Inc. - Miami, FL
Powerflow, Inc. - Buffalo, NY
Rally Manufacturing, Inc. - Miami, FL
Ramsey Winch Company - Tulsa, OK
Rubber Queen - Dublin, OH
Sea Stuffe, Inc. - Cocoa, FL
Seal-Rite/Auto. Insulation, Inc. - Mt. Holly, NJ
SNS Inc. - Topeka, KS
Sparkomatic Corporation - Milford, PA
Superior Industries - Van Nuys, CA
Texas Saddlebags Inc. - Grand Prairie, TX
Therm Technology Corp. - Grandville, MI
Wolf Automotive - Santa Ana, CA
Yeu Yeuh Enterprise Co. Ltd. - Tempe, AZ

Vacuum Cleaners

Ace Hardware Supplies - Central, Hong Kong
Audiovox Corporation - Hauppauge, NY
Coido Corporation - Taipei, Taiwan
Custom Accessories - Niles, IL
Hong Kong Trade Devel. - Chicago, IL
Newark Auto Products - West Orange, NJ
Poli-Auto Inc. - Miami, FL
Rally Manufacturing, Inc. - Miami, FL

Van Parts & Accessories

Airguide Instrument Co. - Buffalo Grove, IL
American Int'l Pacific Ind. - Camarillo, CA
Annton Research - Corona, CA - Corona, CA
Auto Ventshade Company - Chamblee, GA
Barjan Products - East Moline, IL
Bon Aire Industries - Long Beach, CA
China National Auto Industry - Beijing, China
Denco Incorporated - Salt Lake City, UT
Driver Design/National Cycle - Maywood, IL
Fey Automotive Products - Irwindale, CA
G.T. Styling, Inc. - Costa Mesa, CA
Hebe Company Ltd. - Taipei, Taiwan
Highland Group Ind. L.P. - Cleveland, OH
I.M.I./Sunup - Buena Park, CA

Van Parts & Accessories (contd.)

Innocorp Manufacturing, Inc. - Coloma, MI
K-D Lamp Company - Cincinnati, OH
Kar Rite International - Franklin Park, IL
Lifetime Automotive Products - Dallas, TX
Lund Industries - Minneapolis, MN
Mag Instrument Company - Ontario, CA
Make Waves Inst. Corp. - Williamsport, NY
Newark Auto Products - West Orange, NJ
Pacer Performance Prods. - Los Angeles, CA
Perfection Automotive Products - Livonia, MI
Peterson Manufacturing - Grandview, MO
Powerflow, Inc. - Buffalo, NY
Sea Stuff, Inc. - Cocoa, FL
Superior Industries - Van Nuys, CA
Texas Saddlebags Inc. - Grand Prairie, TX
The Shade - Cocoa, FL

Washing/Cleaning Aids

A. Chamois

Acme Sponge & Chamois - Tarpon Springs, FL
AGS Company - Muskegon, MI
Armaly Sponge Company - Walled Lake, MI
Arnold, S.M., Inc. - St. Louis, MO
Bloch/New England - Worcester, MA
Clean-Rite Products - Atlanta, GA
Detailed Designs, Inc. - Plainfield, NJ
DQB Industries - Livonia, MI
Emgee Marketing - Westmont, IL
Hydra Sponge Company, Inc. - Fenton, MO
J.M. Rennis, Inc. - Bridgeport, CT
Nation/Ruskin, Inc. - Montgomeryville, PA
Poli-Auto Inc. - Miami, FL
Schroeder & Tremayne, Inc. - Fenton, MO
Sentry Pack - Westbury, CT

B. Sponges

Acme Sponge & Chamois - Tarpon Springs, FL
Armaly Sponge Company - Walled Lake, MI
S.M. Arnold, Inc. - St. Louis, MO
Bloch/New England - Worcester, MA
Clean-Rite Products - Atlanta, GA
Detailed Designs, Inc. - Plainfield, NJ
Hydra Sponge Company, Inc. - Fenton, MO
J.M. Rennis, Inc. - Bridgeport, CT
Mallory Industries, Inc. - Ontario, Canada
Nation/Ruskin, Inc. - Montgomeryville, PA
Poli-Auto Inc. - Miami, FL
Schroeder & Tremayne, Inc. - Fenton, MO

B. Sponges (contd.)

Sentry Pack - Westbury, CT

C. Spray Wash

Clean-Rite Products - Atlanta, GA
Kentledge Co. Ltd. - Taipei, Taiwan
Samvco Co. - Los Angeles, CA
Sentry Pack - Westbury, CT
Turbo Tek Inc. - Los Angeles, CA

D. Towels

Armaly Sponge Company - Walled Lake, MI
Arnold, S.M., Inc. - St. Louis, MO
Bloch/New England - Worcester, MA
Clean-Rite Products - Atlanta, GA
Detailed Designs, Inc. - Plainfield, NJ
DQB Industries - Livonia, MI
Hydra Sponge Company, Inc. - Fenton, MO
J.M. Rennis, Inc. - Bridgeport, CT
Katrin Systems Inc. - Houston, TX
Nation/Ruskin, Inc. - Montgomeryville, PA
Schroeder & Tremayne, Inc. - Fenton, MO
Scott Paper Company - Philadelphia, PA
Sentry Pack - Westbury, CT

E. Other Washing/Cleaning Aids

3M Company - St. Paul, MN
Armaly Sponge Company - Walled Lake, MI
Arnold, S.M., Inc. - St. Louis, MO
Bloch/New England - Worcester, MA
Carrand Companies, Inc. - Gardena, CA
Clean-Rite Products - Atlanta, GA
Coleman Powermate - Kearney, NE
Denco Incorporated - Salt Lake City, UT
Detailed Designs, Inc. - Plainfield, NJ
DQB Industries - Livonia, MI
Eppco Enterprises, Inc. - Cleveland, OH
H & L Products, Inc. - National City, CA
Hopkins Manufacturing Corp. - Emporia, KS
Hydra Sponge Company, Inc. - Fenton, MO
J.M. Rennis, Inc. - Bridgeport, CT
Luverne Products - Brandon, SD
Mallory Industries, Inc. - Ontario, Canada
Nation/Ruskin, Inc. - Montgomeryville, PA
Old World Auto Prd./Peak - Northbrook, IL
Perfection Auto Products - Livonia, MI
Rally-Mag Products - Newport Beach, CA
Samvco Co. - Los Angeles, CA
Schroeder & Tremayne, Inc. - Fenton, MO
Scott Paper Company - Philadelphia, PA

E. Other Washing/Cleaning Aids (contd.)

Sentry Pack - Westbury, CT

Unelko Corporation - Scottsdale, AZ

Washing/Cleaning Chemicals**A. Chrome Cleaner**

Advanced Polish Tech - Lakewood, CA

Blue Coral, Inc. - Cleveland, OH

Camco Mfg., Inc. - Greensboro, NC

First Brands Corporation - Danbury, CT

Gliptone Industries Ltd. - Holbrook, NJ

K & W Products - Bell Gardens, CA

Klean-Strip Automotive Div. - Memphis, TN

Loctite Corporation - Cleveland, OH

Meguiar's, Inc. - Irvine, CA

Mothers Polish Co. - Huntington Beach, CA

One Grand Products, Inc. - Van Nuys, CA

Radiator Specialty Co. - Charlotte, NC

Rolite Chemical & Mfg. Corp. - Hartland, WI

Treatment Products, Ltd. - Chicago, IL

Turtle Wax - Chicago, IL

William K. Westley Co. - Garfield Heights, OH

B. Glass Cleaner

Advanced Polish Tech - Lakewood, CA

Airosol Company, Inc. - Neodesha, KS

Berkebile Oil Co., Inc. - Somerset, PA

Bondo Consumer Products Div. - Atlanta, GA

CSA Limited, Inc. - Houston, TX

Cyclo Automotive Products - Lake Park, FL

Flotool International - Santa Ana, CA

Gliptone Industries Ltd. - Holbrook, NJ

Gold Eagle Company - Chicago, IL

HEET Automotive Division - Oak Brook, IL

K & W Products - Bell Gardens, CA

Klean-Strip Automotive Div. - Memphis, TN

Loctite Corporation - Cleveland, OH

Marson Corporation - Chelsea, MA

Meguiar's, Inc. - Irvine, CA

Mothers Polish Co. - Huntington Beach, CA

Nationwide Industries, Inc. - Durham, NC

North American Oil Company - Atlanta, GA

One Grand Products, Inc. - Van Nuys, CA

Plasti-Kote Company, Inc. - Medina, OH

Radiator Specialty Co. - Charlotte, NC

Rolite Chemical & Mfg. Corp. - Hartland, WI

Sentry Pack - Westbury, CT

Talso! Corporation/Mar-Hyde - Cincinnati, OH

Treatment Products, Ltd. - Chicago, IL

C. Polish

Acryll Industries, Ltd. - Buffalo, NY

Advanced Polish Tech - Lakewood, CA

AGS Company - Muskegon, MI

Blue Coral, Inc. - Cleveland, OH

Blue Magic Polish Corp. - Santa Ana, CA

Camco Mfg., Inc. - Greensboro, NC

Chamberlain Group (Waxcoa) - Elmhurst, IL

Diamond Brite, Inc. - Framington Hills, MI

Eagle One Industries - Carlsbad, CA

First Brands Corporation - Danbury, CT

Gliptone Industries Ltd. - Holbrook, NJ

Gold Eagle Company - Chicago, IL

Harvey Westbury Corp. - Westbury, NY

K & W Products - Bell Gardens, CA

Klean-Strip Automotive Div. - Memphis, TN

Liquid Glass Enterprises Inc. - Teaneck, NJ

Lustre-Glo, Inc. - Miami, FL

Meguiar's, Inc. - Irvine, CA

Mothers Polish Co. - Huntington Beach, CA

Northern Labs Inc. - Manitowoc, WI

One Grand Products, Inc. - Van Nuys, CA

Reed-Union Corp. - Chicago, IL

Rolite Chemical & Mfg. Corp. - Hartland, WI

Sentry Pack - Westbury, CT

Solv-o Corporation - Taylor, MI

Treatment Products, Ltd. - Chicago, IL

Turtle Wax - Chicago, IL

William K. Westley Co. - Garfield Heights, OH

D. Sealers/Protectors

303 Products Inc. - Redding, CA

Advanced Polish Tech - Lakewood, CA

Blue Coral, Inc. - Cleveland, OH

Camco Mfg., Inc. - Greensboro, NC

CSA Limited, Inc. - Houston, TX

First Brands Corporation - Danbury, CT

Gliptone Industries Ltd. - Holbrook, NJ

K & W Products - Bell Gardens, CA

Klean-Strip Automotive Div. - Memphis, TN

Loctite Corporation - Cleveland, OH

Meguiar's, Inc. - Irvine, CA

Mothers Polish Co. - Huntington Beach, CA

Nationwide Industries, Inc. - Durham, NC

One Grand Products, Inc. - Van Nuys, CA

Plasti-Kote Company, Inc. - Medina, OH

Radiator Specialty Co. - Charlotte, NC

Rhino Industries - Tampa, FL

D. Sealers/Protectors (contd.)

Rolite Chemical & Mfg. Corp. - Hartland, WI
Treatment Products, Ltd. - Chicago, IL
Turtle Wax - Chicago, IL
Unelko Corporation - Scottsdale, AZ

E. Soap

Armor All Products Corp. - Aliso Viejo, CA
Camco Mfg., Inc. - Greensboro, NC
Chamberlain Group (Waxcoa) - Elmhurst, IL
Clean Plus/Tarkelp - West Concord, MN
Coleman Powermate - Kearney, NE
Gliptone Industries Ltd. - Holbrook, NJ
Go-Jo Industries - Akron, OH
Gold Eagle Company - Chicago, IL
Goop Division - St. Louis, MO
K & W Products - Bell Gardens, CA
Klean-Strip Automotive Div. - Memphis, TN
Loctite Corporation - Cleveland, OH
Meguiar's, Inc. - Irvine, CA
Mothers Polish Co. - Huntington Beach, CA
Northern Labs Inc. - Manitowoc, WI
One Grand Products, Inc. - Van Nuys, CA
Radiator Specialty Co. - Charlotte, NC
Sentry Pack - Westbury, CT
Solv-o Corporation - Taylor, MI
Treatment Products, Ltd. - Chicago, IL
Turtle Wax - Chicago, IL

F. Tar Remover

Airosol Company, Inc. - Neodesha, KS
Blue Coral, Inc. - Cleveland, OH
CSA Limited, Inc. - Houston, TX
First Brands Corporation - Danbury, CT
Gliptone Industries Ltd. - Holbrook, NJ
Meguiar's, Inc. - Irvine, CA
One Grand Products, Inc. - Van Nuys, CA
Plasti-Kote Company, Inc. - Medina, OH
Radiator Specialty Co. - Charlotte, NC
Ronson Cons. Pros Corp. - Somerset Park, NJ
Treatment Products, Ltd. - Chicago, IL
Turtle Wax - Chicago, IL

G. Tire/Whitewall Cleaner

Airosol Company, Inc. - Neodesha, KS
Blue Coral, Inc. - Cleveland, OH
CSA Limited, Inc. - Houston, TX
Cyclo Automotive Products - Lake Park, FL
Eagle One Industries - Carlsbad, CA
First Brands Corporation - Danbury, CT

G. Tire/Whitewall Cleaner (contd.)

Flotool International - Santa Ana, CA
Gliptone Industries Ltd. - Holbrook, NJ
K & W Products - Bell Gardens, CA
Kafko International Ltd. - Chicago, IL
Klean-Strip Automotive Div. - Memphis, TN
Liquid Glass Enterprises Inc. - Teaneck, NJ
Meguiar's, Inc. - Irvine, CA
National Interchem, Corp. - Chicago, IL
Nationwide Industries, Inc. - Durham, NC
No Touch Tire Care - Irvine, CA
North American Oil Company - Atlanta, GA
Northern Labs Inc. - Manitowoc, WI
One Grand Products, Inc. - Van Nuys, CA
Radiator Specialty Co. - Charlotte, NC
Rhino Industries - Tampa, FL
Solv-o Corporation - Taylor, MI
Treatment Products, Ltd. - Chicago, IL
Turtle Wax - Chicago, IL
William K. Westley Co. - Garfield Heights, OH

H. Upholstery Cleaner

Airosol Company, Inc. - Neodesha, KS
Blue Coral, Inc. - Cleveland, OH
CSA Limited, Inc. - Houston, TX
Eagle One Industries - Carlsbad, CA
First Brands Corporation - Danbury, CT
Gliptone Industries Ltd. - Holbrook, NJ
K & W Products - Bell Gardens, CA
Klean-Strip Automotive Div. - Memphis, TN
Meguiar's, Inc. - Irvine, CA
Mothers Polish Co. - Huntington Beach, CA
Northern Labs Inc. - Manitowoc, WI
One Grand Products, Inc. - Van Nuys, CA
Radiator Specialty Co. - Charlotte, NC
Ronson Cons. Pros Corp. - Somerset Park, NJ
Talsol Corporation/Mar-Hyde - Cincinnati, OH
Turtle Wax - Chicago, IL

I. Vinyl Cleaner

303 Products Inc. - Redding, CA
Airosol Company, Inc. - Neodesha, KS
Blue Coral, Inc. - Cleveland, OH
Camco Mfg., Inc. - Greensboro, NC
CSA Limited, Inc. - Houston, TX
First Brands Corporation - Danbury, CT
Gliptone Industries Ltd. - Holbrook, NJ
Harvey Westbury Corp. - Westbury, NY
K & W Products - Bell Gardens, CA

I. Vinyl Cleaner (contd.)

Klean-Strip Automotive Div. - Memphis, TN
Liquid Glass Enterprises Inc. - Teaneck, NJ
Meguiar's, Inc. - Irvine, CA
Mothers Polish Co. - Huntington Beach, CA
Northern Labs Inc. - Manitowoc, WI
One Grand Products, Inc. - Van Nuys, CA
Plasti-Kote Company, Inc. - Medina, OH
Radiator Specialty Co. - Charlotte, NC
Rhino Industries - Tampa, FL
Rolite Chemical & Mfg. Corp. - Hartland, WI
Ronson Cons. Pros Corp. - Somerset Park, NJ
Talsol Corporation/Mar-Hyde - Cincinnati, OH
Treatment Products. Ltd. - Chicago, IL
Turtle Wax - Chicago, IL
William K. Westley Co. - Garfield Heights, OH

J. Wax

AGS Company - Muskegon, MI
Armor All Products Corp. - Aliso Viejo, CA
Blue Coral, Inc. - Cleveland, OH
Camco Mfg., Inc. - Greensboro, NC
Chamberlain Group (Waxcoa) - Elmhurst, IL
Coleman Powermate - Kearney, NE
Direct to Retail - Natick, MA
Eagle One Industries - Carlsbad, CA
First Brands Corporation - Danbury, CT
Gliptone Industries Ltd. - Holbrook, NJ
Harvey Westbury Corp. - Westbury, NY
Klean-Strip Automotive Div. - Memphis, TN
Klinview - Irvine, CA
Meguiar's, Inc. - Irvine, CA
Mothers Polish Co. - Huntington Beach, CA
Northern Labs Inc. - Manitowoc, WI
One Grand Products, Inc. - Van Nuys, CA
QMI, Inc. - Lakeland, FL
Rolite Chemical & Mfg. Corp. - Hartland, WI
Sentry Pack - Westbury, CT
Treatment Products, Ltd. - Chicago, IL
Turtle Wax - Chicago, IL

K. Other Washing/Cleaning Chemicals

Altawood Aerosols - Upland, CA
Armor All Products Corp. - Aliso Viejo, CA
Blue Coral, Inc. - Cleveland, OH
Blue Magic Polish Corp. - Santa Ana, CA
Clean Plus/Tarkelp - West Concord, MN
Flotool International - Santa Ana, CA
Go-Jo Industries - Akron, OH

K. Other Washing/Cleaning Chemicals (contd.)

Gold Eagle Company - Chicago, IL
Heartland Corporation - Olathe, KS
Heet Automotive Division - Oak Brook, IL
Meguiar's, Inc. - Irvine, CA
Mothers Polish Co. - Huntington Beach, CA
Northern Labs Inc. - Manitowoc, WI
One Grand Products, Inc. - Van Nuys, CA
Radiator Specialty Co. - Charlotte, NC
Samvco Co. - Los Angeles, CA
Simple Green Division - Huntington Harbor, CA
Turbo Tek, Inc. - Los Angeles, CA

Wheels, Wheels Accessories

American Racing, Inc. - Schaumburg, IL
Automotive Accessories Mfg., Inc. - Boise, ID
China National Auto Industry - Beijing, China
Coido Corporation - Taipei, Taiwan
Concord Wheelware Inc. - Santa Fe Spring, CA
Cragger Wheel & Exhaust Div. - Cleveland, OH
Custom Accessories - Niles, IL
Evergreen Automobiles - Delhi, India
Gorilla Automotive Products - Los Angeles, CA
Hodge Mfg. Co. Inc. - Murfreesboro, TN
Make Waves Inst. Corp. - Williamsport, NY
Mr. Gasket Company - Cleveland, OH
McGard, Inc. - Orchard Park, NY
NTY International - So. Plainfield, NJ
Rally Manufacturing, Inc. - Miami, FL
Superior Industries - Van Nuys, CA
Wang's International Inc. - Baldwin Park, CA
Wheel Mate Products - Santa Fe Spring, CA

Associations & Trade Shows: Contents

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Trade Show Calendar

1992

- September 10 - 12, 1992 National Auto Glass Conference
Boca Raton, Florida
- October 1 - 3, 1992 National Tire Dealers & Retreaders Association
72nd Annual Trade Show and Convention
Las Vegas, Nevada
- October 2 - 4, 1992 APAA Show
Chicago, Illinois
- October 11 - 15, 1992 Automotive Warehouse Distributors Association
45th Annual Business Conference
Las Vegas, Nevada
- INDUSTRY WEEK '92 (65,000 expected)
- October 29 - November 1, 1992 International Big R Show (APRA)
Las Vegas, Nevada
- November 1 - 2, 1992 Automotive Service Industry Association
Las Vegas, Nevada
- November 2, 1992 SEMA/AI Show Innovations Day
Las Vegas, Nevada
- November 3 - 6, 1992 SEMA/AI Show
Las Vegas, Nevada
- November 3 - 6, 1992 Big I/ APAA Show
Las Vegas, Nevada
- November 3 - 6, 1992 Auto International Association
Las Vegas, Nevada
- November 3 - 6, 1992 Motor and Equipment Manufacturers Association
Las Vegas, Nevada
- November 4, 1992 APAA Industry Wide Reception
Las Vegas, Nevada

1993

April 13 - 17, 1993

National Glass & Machinery Show
Nashville, Tennessee

September 6 - 9, 1993

National Tire Dealers & Retreaders Association
73rd Annual Trade Show and Convention
Orlando, Florida

September 30 - Oct. 2, 1993

National Auto Glass Conference
Miami, Florida

October 1 - 4, 1993

International Big R Show (APRA)
Cincinnati, Ohio

INDUSTRY WEEK '93

October 30 - November 1, 1993

Automotive Service Industry Association Convention
Las Vegas, Nevada

November 1 - 4, 1993

SEMA/APAA/MEMA
Las Vegas, Nevada

November 2 - 5, 1993

Automotive Service Industry Association Show
Las Vegas, Nevada

1994

March 8 - 12, 1994

National Glass & Machinery Show
Las Vegas, Nevada

Associations: Index

1. APAA	Automotive Parts & Accessories Association	(301) 654-6664
2. APRA	Automotive Parts Rebuilders Association	(703) 968-2772
3. ASA	Automotive Service Association	(817) 283-6205
4. ASIA	The Automotive Service Industry Association	(708) 228-1310
5. AWDA	Automotive Warehouse Distributors Association	(816) 444-3500
6. MEA	Mobile Electronics Association	(202) 828-2270
7. MEMA	Motor & Equipment Manufacturers Association	(919) 549-4800
8. NGA	National Glass Association	(703) 442-4890
9. NTDRA	National Tire Dealers & Retreaders Association	(202) 789-2300
10. SEMA	Specialty Equipment Market Association	(714) 396-0289

Association Membership

ASIA: 22% (Automotive Service Industry Association)
APAA: 11% (Automotive Parts & Accessories Association)
SEMA: 11% (Specialty Equipment Market Association)
AWDA: 10% (Automotive Warehouse Distributors Association)

59% attend some national trade show every year.

- 80% of WDs
- 75% of Retailers
- 56% Non-programmed jobbers
- 43% Programmed jobbers

Automotive Parts Rebuilders Association (APRA)

4401 Fair Lakes Court, Suite 210

Fairfax, VA 22033

(703) 968-2772, FAX (703) 968-2878

Membership: 1,550+ Rebuilders and their Suppliers -
Founded 1941

Scope, Purposes, Benefits of Membership

- Lobbying Activities
- Annual Technical Clinics:
 - Air Conditioning Systems
 - Brake Systems
 - Engine Management Systems
 - Clutch
 - Electrical
 - Transmission
 - Mechanical/ Hydraulic Parts
 - Heavy Duty Brake
 - Heavy Duty Transmission
 - also visits to Rebuilding, Supplier and/or
 - Original Equipment Plants
 - Electrical Tech Seminars
 - Charging & Starting Systems Schools
 - Publications:
 - Directories - free to Members, \$250 to non-members
 - Safety Manual
 - Clutch Specification Guide
 - Delco Remy Q & A Booklet
 - Electric Diagnostic Video Tape
 - Electrical Connection newspaper, 10 issues annually - for electrical rebuilding ind.
 - Travel Network
 - Discounted Freight Program
 - Technical Service Team - phone answers and Tech Bulletins
 - Electrical Rebuilding Consulting Service
 - Long Distance Phone Discount Program

Dues: Rebuilders \$305 - \$1,580/yr depending on # Employees

Mfr. Supplier/Core Supplier - \$580 - \$3,600/yr - Sales volume to Rebuilders

Manufacturers Reps \$350/yr

International Member \$325/yr

Automotive Warehouse Distributors Association (AWDA)

9140 Ward Parkway
Kansas City, MO 64114
(816) 444-3500, FAX (816) 444-0330

Membership: Warehouse Distributors and their Suppliers of parts, accessories, tools and supplies for the automotive aftermarket

Scope, Purpose, Benefits of Membership:

Lobbying

AWDA University - Continuing Business Management Education leading to "Automotive Aftermarket Professional". Uses Traveling Faculty programs and on-site Training courses.
Presents 2 days of courses preceding Annual Business Conf.

Publications:

AWDA News - 10 issues annually - Member Profiles, Legislative Alert, Management Ideas, Insurance Advisory, Safety, etc.

Ad Trends: Monthly - collection of current ads, trend reports, ad reviews, success stories, marketing tips

How's Business - Monthly Regional and National data - Sales trends, recaps

Warehouse Productivity Report - monthly printouts to participants

Annual Financial Analysis Report - participants are provided individualized comparison info.

"The Network" - security/loss prevention program

Property/ Casualty Insurance Program

Long Distant Telephone discount Program

Dues: Distributor Member \$630 - \$4,620 - Aftermarket Sales Volume

Associate Member \$630 - \$4,620 Aftermarket Sales Volume

Affiliate Member \$1,500

The Automotive Service Industry Association (ASIA)

444 North Michigan Avenue, Suite 2000
Chicago, IL 60611-3975
(708) 228-1310, FAX (708) 228-1510

Members: 4,500+ Companies involved in the manufacture, distribution and sale of Motor Vehicle parts, accessories, materials, equipment, tool and supplies

Scope, Purpose and Benefits of Membership

Lobbying, including monthly newsletter to members

Publications:

Aftermarket Today - Monthly magazine

Handbooks, Bulletins

"Cost of Doing Business" Analysis Program

Discounts on - Telephone Service, car rentals, airline tickets, office equipment

Cooperated with the University of Illinois College of Commerce and Business Administration to offer

Executive Development programs for every segment of the aftermarket.

Dues: \$625 - \$1,250/yr for Non-Voting service affiliate membership

Dependent on Total Annual Sales or billings to Automotive manufacturers, wholesalers, etc.

\$950 - \$5,500/yr for Manufacturer membership - varies with annual sales volume

Mobile Electronics Association (MEA)

(formerly Car Audio Specialists Association and Vehicle Security Association - CASA/VSA)

2101 L Street N.W., Suite 400

Washington, D.C. 20037

(202) 828-2270, FAX (202) 331-3817

Members: 400+ Companies representing 9,000 Retail Store fronts

Scope, purpose and benefits of membership

Lobbying - Federal & State

Promotion of Mobile Electronics Certification Program for Installers

Research & Publications

Mobile Electronics Monitor - Bi-Monthly

Annual Mobile Electronics Market Trends Guide

Dues: \$100 - \$11,000/yr depending on Annual mobile electronics sales

Automotive Parts & Accessories Association (APAA)

4600 East-West Highway, #300

Bethesda, MD 20814-3415

(301) 654-6664, FAX (301) 654-3299

Members: 1,500+ Manufacturers, Retailers, Distributors, Wholesalers, Independent Sales Reps

Scope, Purpose & Benefits to members

Lobbying - Federal & State

Publications: Members get 20% discount

"The Last Word" weekly newsletter -Updates on domestic and international issues that impact the aftermarket industry

APAA Membership Directory

Aftermarket Guide

Aftermarket Fact Book

Market Research Reports

Technical Service bulletins

Market Research data and custom market research service

Planogram Service

Group Health and General Business Insurance

Discount on booth space at Big I/APAA Show

Dues: \$165 - \$2,700, varies with annual sales/co. category

Specialty Equipment Market Association (SEMA)

1575 South Valley Vista Drive, P.O. Box 4910
 Diamond Bar, CA 91765-0910
 (714) 396-0289, FAX (714) 860-0184

Membership: 2,200+ Companies. Founded in 1963

Scope, Purpose, Membership Benefits

Lobbying - Publishes quarterly reports on bills (state & Federal) affecting members and prepares industry positions on relevant issues. Also issues Legislative Alerts when urgent matters arise.

Publications -

SEMA News - Monthly newsletter

Fast Facts - quick overviews

Industry and Legislative Alerts

Members given monthly reporting forms to send in material for the above publications.

Annual SEMA Market Study - free to members, \$595 to others. Additionally, Market research now monthly in SEMA news.

Membership Directory (members only)

Manufacturer's Rep Directory

Annual SEMA/AI Show - members can draw exhibit locations first, get space at a discount, have access to 3 special lounges, no-fee pre-registration, pre-Show bulletins and show planners.

Business Assistance -

Technical Assistance:

Emissions certification information

Exporting assistance program, incl. quarterly newsletter

Use of SEMA logo, Membership plaque for display

Information Service Hot Line

Credit Reporting Group - credit info on industry specific potential accounts

Original Equipment Manufacturer Relations Programs

Insurance Services, travel services

Discounts on Overnight mail, Phone, Rental Car

Mailing Lists and Labels Service

Special Presentations and Seminars

"Think Tank" Workshops resulting in reports to members

SEMA National Management Conference - Seminars and panel discussions

SEMA/AI Innovations Day - instruction on new ideas and opportunities.

Dues: \$100 - \$10,000 depending on annual sales and Co. category

Automotive Service Association (ASA)

(formerly Independent Automotive Service Association, IASA and the Automotive Service Councils, ASC)
1901 Airport Freeway, Suite 100
P.O. Box 929
Bedford, TX 76021
(817) 283-6205, FAX (817) 685-0225

Members: 11,000 member Shops in 3 major divisions - Mechanical, Collision and Transmission

Scope, Purpose, Member benefits

Lobbying - Federal and State

Insurance Programs

Group Worker's Compensation and Garage liability

Training

"Telediagnosis" - technical information and diagnostic assistance telephone service

Videotapes - Repair procedures

Management Institute and technical seminars

Shows & Expositions

Annual Convention and Leadership Conference

National Autobody Congress and Exposition (NACE)

Congress of Automotive Repair and Service (CARS)

TRANSMEET - for transmission division

Management Assistance

ASA Federal Credit Union

Kits, Manuals, info issued by Gov't agencies

Wage-Hour Hot line

Employee screening service

Credit card processing discount

Printed forms, business products and promotional items, Long distance phone and travel discounts

Publications

"AutoInc." Monthly magazine

Divisional bulletins

National Dues: \$150/yr. - may be additional State and Local dues as well

Motor & Equipment Manufacturers Association (MEMA)

10 Laboratory Drive, P.O. Box 13966
 Research Triangle Park, NC 27709-3966
 (919) 549-4800, FAX (919) 549-4824

MEMA product line, peer and market segment groups:

- Autobody Supply & Equipment Manufacturers Council
- Automotive Chemical Manufacturers Council
- Automotive Cooling System Institute
- Automotive MIS Council
- Automotive Exhaust System Manufacturers Council
- Filter Manufacturers Council
- Automotive Presidents Council
- Automotive Public Relations Council
- Brake System Parts Manufacturers Council
- Export Marketing Group
- Heavy Duty Brake Manufacturers Council
- Heavy Duty Business Forum
- Heavy Duty Manufacturers Association
- OE Supplier Division
- Overseas Automotive Council
- Transportation Safety Equipment Institute
- Tune-Up Manufacturers Institute

MEMA, in cooperation with the U.S. Dept of Commerce, Office of Trade Adjustment Assistance, sponsors the U.S. Automotive Parts Industry, Japan Office. The Office is in Tokyo. Trade Conferences, research and support to U.S. suppliers are offered, as are databases of Japanese and U.S. Suppliers and Markets. "Japan Automotive Insight", a newsletter, is published monthly and contains "North American Briefs", "Japan Briefs" and periodic European and Asia-Pacific sections. Subscriptions are half-price to MEMA members.

MEMA was founded in 1904 to represent manufacturers of products used in, on, or for the service of motor vehicles. There are currently 700+ members.

Scope, purpose, Member benefits:

Lobbying - includes a Washington, DC office, publication of "Washington Digest" and "Legislation" dealing respectively with Federal and State regulatory issues

MEMA Market Research and Analysis Program

MEMA Statistical Reporting Program

Proprietary studies on industry developments and practices

Electronic Data Interchanges: MEMA/TRANSNET - electronic order system (also TRANSFAX)
 ANSINET - document transfer network

Bar Coding Services

Credit, Collection & Rehabilitation Services

Manufacturer oriented educational programs - Conferences, seminars, etc.

MEMA Personnel Insight, Personnel Available/ Positions Available newsletter, Box# service

Market Analysis - Bimonthly report on the vehicle parts industry

Dues: \$900 - \$8,500/yr. varies with total annual automotive sales volume.

National Tire Dealers & Retreaders Association, Inc. (NTDRA)

1250 "T" Street, NW, Suite 400
Washington, D.C. 20005-3989
(202) 789-2300, (800) 87-NTDRA

International Membership of 5,300+

Scope, purpose, Member Benefits:**Lobbying**

Publish monthly NTDRA Dealer News, periodic Supplier HOTLINE, Annual member listing (nearly 15,000 retail tire and automotive service centers), "NTDRA Who's Who", regular financial and marketing studies, MEMBER Program Newsletter.

Insurance: Personal and Business Property, Worker's Comp, Garage keepers, Loss of Income, etc.

Telephone Consultation with Management Consultants

Retread Plant Inspection

Check Guarantee

Industry's largest Trade Show

Annual OTR Conference

Dues: Supplier Group Member \$270 - \$1,020/yr - based on Annual Sales to Industry

U.S. Tire Dealer/Retreader - \$250 - \$750/yr, varies with Annual Sales

Canadian Tire dealer/Retreader \$87.50/yr.

National Glass Association (NGA)

8200 Greensboro Drive, Suite 302

McLean, VA 22102

(703) 442-4890, FAX (703)442-0630

Founded 1948 for the flat (float and sheet) glass industry - architectural, automotive and specialty glass.
 Nearly 3,000 member companies in USA, Canada, Mexico and about 20 other countries.

Scope, purposes and benefits of membership:

Lobbying at State and Federal levels - supported by NGA-GAIF (National Glass Association-Government Affairs Industry Fund. Members are solicited for donations and receive complimentary subscription to bimonthly newsletter, "Government Affairs Update".

Complimentary subscription to Glass Magazine and/or AutoGlass Magazine
 Glass Magazine includes annual New Products issue, NGA Member Directory issue and NGA Convention & National Glass & Machinery Show Preview issue.

Discounts offered:

- Educational, technical and safety materials
- Glass Management Institute enrollment fees
- Registration for Annual Convention and National Glass and Machinery Show and National Auto Glass Conference
- MCI long distance phone service

For Supplier Members -**Discounts include:**

- Exhibit space at National Glass and Machinery Show
- Mailing lists

Benefits include:

- Sales leads and referrals from other members
- Marketing opportunities to important buyers (Show?)

Dues: \$120 - \$1,200/ yr plus \$10 for each add'l U.S. location,

\$50 for each add'l Canadian or Mexican location, plus \$25 surcharge for non U.S.-based Companies.

Consumer Profile: Contents

Preface: It is critical to understand the end consumer for your products, their wants & needs, dislikes of competitive products, where they shop, and how they make decisions.

This study did not conduct any focus groups or quantitative consumer research. All information on consumer profiles is from published articles. We highly recommend conducting research on the New England consumer before entering this market.

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1. Hard Parts: DIY vs. Professional Service Mix.....	168
2. Import Owner profiles.....	169-170
3. DIY classifications.....	171
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Hard Parts

- As median age of cars gets longer, vehicles will need basic drive train (hard parts) components.
- Trend towards Professional Installation

	(1992)	
	<u>DIY</u>	<u>Professionally Serviced/Installed</u>
1. Air Filters	53%	47%
2. Belts	52	48
3. Oil Filters	53	47
4. Electrical	45	55
5. Hoses	52	48
6. Ignition	45	55
7. Mufflers	44	56
8. System Parts Shocks	50	50
9. Brake Parts Cooling	52	48
10. Brakes	48	52
11. Suspension	52	48
12. Ride Control	44	56
13. Pipes	48	52
14. Struts	32	68
15. Fuel Injection	30	70

- Most profitable Hard Parts:
 1. Ignition
 2. Remanufactured Parts
 3. Brakes
 4. Front End
 5. Oil Filters

Import Owners

- 20% of vehicle maintainers are non-DIYers.
- 23% of import vehicle maintainers are non-DIYers.
- 16% of all vehicle maintainers are DIYers.
- 3% of import vehicle maintainers are DIYers.
- 64% - total maintenance is "Buy it and Do it for me".
- 74% - import vehicle maintenance

Volvos

- 50/50 Male/Female
- 25-44 yrs. old
- 1/2: Light DIYers

Mercedes, Jaguar, VWs

- Predominantly Male
- VWs: medium to dedicated DIYers
- Mercedes/Jaguars: non to light DIYers

Hondas

- 75%/25% Female/Male
- 25% under 25, 33% between 24-34
- 33% <\$30M, 25% \$30-40M
- 13% Non-DIYers, 65% Light DIYers

Toyotas

- 64%/36% Female/Male
- 25% 25-34, 33% 35-44
- 20% <\$20M, 38% >\$40M
- 35% non-DIYers, 50% Light DIYers

Import Parts (Source: Automotive Marketing - August '92)

- Profile of Import Vehicle Owners
 1. Younger (almost 45% are under 34)
 2. More influential (successful)
 3. Higher incomes
 4. More meticulous
 5. Better educated (42% of owners are college graduates)
 6. Get work done professionally (usually at the original car dealer)
(23% of all import owners are non-DIYers)

- European car owners are car buffs. Utilize dealer services more.
- Japanese owners are looking for value.
- Of all subcompact & compact sales in 1990, 54% to women.
- 75% of Honda owners are female.
- 64% of Toyota owners are female.

- Parts & Accessories for European vehicles - sell to professional installers
- VW & Japanese vehicles - sell to more retail-oriented chains

Consumer Profiles (Source: Automotive Marketing - March '92)

Vehicle Maintenance

1. Non DIYers	20%	(67% are female)
2. Light DIYers	38%	(58% are female)
3. Medium DIYers	25%	(73% are male)
4. Dedicated DIYers	16%	(95% are male)

Non-DIYers

- Use Professionals for everything
- Female, very young, or over 55, low or high income HHs
- As population ages, non-DIYers will grow.

Light DIYers

- Top off oil, wash the car, put a floor mat in
- 23% have incomes under \$20M
- 35% have incomes over \$40M

Medium DIYers

- Will attempt easy repair & maintenance jobs

Dedicated DIYers

- Make up the bulk of the sales to most retailers & jobbers
- 35% have incomes over \$40M

Light Truck Owners

- 75% Male, 25% Female
- 50% between 25 & 44 yrs. old
- 38% earn over \$40M
- 67% are significant DIYers

Products Purchased in 1991 (Source: Consumer Automotive Repair Study)

	<u>Non DIYers</u>	<u>Light DIYers</u>	<u>Medium DIYers</u>	<u>Heavy DIYers</u>
Motor Oil	75%	84%	64%	65%
Filters	64	78	69	66
Tune-up parts	43	52	55	52
Antifreeze	37	42	47	43
Brake System parts	24	39	43	41
Batteries	26	35	35	33
Wipers	25	34	34	32
Wax/Polish	28	29	34	29
Engine system parts	14	22	30	39
Lighting system parts	14	24	30	33
Exhaust system parts	13	22	29	28
Cooling system parts	9	18	25	26
Other appearance chemicals	11	21	20	17
Gas additives	5	21	21	25
Fuel system parts	11	15	22	29
Tire cleaning products	7	20	20	20
Starting and charging parts	8	14	23	27
Shocks/struts	8	14	18	27
Body repair products	12	12	19	22
Interior cleaning products	7	15	15	16
Front end parts	7	10	14	24
Electronic accessories	6	11	14	14
Books/manuals	2	8	13	23
Custom wheels/accessories	4	9	12	8
Seat covers	3	3	8	10
Floor mats	2	9	8	12
<u>Store Type</u>				
Auto parts	14%	37%	45%	45%
Dept. store	4	17	19	25
Discount	6	37	40	35
Gas station	5	15	17	15
Hardware	3	14	17	16
Drug store	1	5	5	7
Supermarket	3	14	13	12
Convenience	•	11	10	13
Car dealer	1	10	17	23
Specialty	5	18	28	27
Junkyard	•	•	3	2

Publications

	<u>Phone</u>
• Aftermarket Business	(216) 891-2789
• Auto Glass (Publication of the National Glass Association)	(703) 442-4890
• Automotive Aftermarket (Chilton Publishing)	(215) 964-4000
• Automotive Body Repair (Chilton Publishing)	(215) 964-4000
• Automotive Marketing (Chilton Publishing)	(215) 964-4000
• Automotive Rebuilder (Babcox Publishing)	(216) 535-6117
• Body Shop Business (Babcox Publishing)	(216) 535-6117
• Brake & Front End (Babcox Publishing)	(216) 535-6117
• Counterman (Babcox Publishing)	(216) 535-6117
• Import Automotive Parts & Accessories (Meyers Publishing)	(818) 785-3900
• Import Car & Truck (Babcox Publishing)	(216) 535-6117
• Jobber Retailer	(216) 867-4401
• Mobile Electronic Monitor (Publication of the Mobile Electronics Association)	
• National Home Center News	
• SEMA News	
• Specialty Automotive (Meyers Publishing)	(818) 785-3900
• Specialty & Custom Dealer (Babcox Publishing)	(216) 535-6117
• Tire Review (Babcox Publishing)	(216) 535-6117

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