

Profile of the brakes aftermarket

THE RELINED BRAKE market for jobbers and WDs is still very much alive and doing well, according to Hunter Publishing Co.'s Service Job Analysis 1973.

The attached charts all testify to the above conclusion.

All of these charts were compiled on the brakes aftermarket from the SJA 1973, which gives a complete analysis of service work conducted by service stations, independent repair shops, car and truck dealers and fleet shops.

As to relined brakes, go to the top chart. The first two categories are what we're comparing. Relined shoes were installed on 41,397,000 car wheels, compared to new shoe sets that were put on 13,518,000 car wheels.

Furthermore, service stations installed more than three times as many relined shoes as they did new shoe sets. Also, independent

repair shops installed more than four times the number of relined shoes compared to new shoe sets. A difference occurs for car/truck dealers. Here, this type of business put on nearly the same number of relined shoes as new shoe sets.

A similar comparison — more brake reline work than new brakes installed — can be seen for the next two categories — number of truck wheels upon which brake work was performed.

For example, brakes relined on truck wheels totals 6.3 million, versus 2.6 million wheels which had new brakes installed. Move to the right across the chart. In each type of business, more brake relining work was done than new brakes put on truck wheels.

The truck brake listings say something else. In each instance, service stations, garages and car/truck dealers — together — are doing the bulk of truck brake jobs. Not the fleet shops. A majority of this work, then, is done else-

where than at fleet shops. This is a little extra fact to keep in your market strategy notebook. It appears from The Brakes Aftermarket chart that service stations aren't pushing disc brake jobs.

This particular chart shows that only 36.1% of the service stations replaced disc brake pad sets, whereas 69.8% of the car/truck dealers replaced such disc brake sets.

Also, the average number of pad sets replaced in a year by car/truck dealers doing this kind of work totals 118.4 sets. The service station dealer's average number is 51 sets. The garage does better with 65.5 sets. And fleet shops come in with an average of 64.8 sets replaced.

The remaining charts detail the brakes aftermarket by establishment size. Using relined shoes installed as an example, service stations in the \$60-100,000 category did 32.9% of these jobs; garages in the over

\$100,000 volume had 49.6% of the work and car/truck dealer shops in the over \$250,000 bracket did 34.7% of the installations.

Several interesting trends are apparent when you examine the chart that shows brake work activity for those fleet shops doing these kind of jobs.

Common carriers with cars heavily favor using relined brake shoes rather than new brake shoe sets. The jobs performed are 39.4% and 9%, respectively. Private carriers show a complete reversal. New shoe sets account for 47.8% of the jobs, with relined shoes taking 38.8% of the work. And, government fleets prefer new shoe sets over relined shoes.

For trucks, the common carriers again would rather relino brakes than install new brakes. The private sector switches, preferring new brakes to those relined. The government uses both relined and new brakes about evenly. □



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THE MARKET BY TYPE OF SHOP

	TOTAL	SERVICE STATIONS	INDEPENDENT REPAIR SHOPS	CAR/TRUCK DEALERS	FLEET SHOPS
Universe		194,000	108,000	39,000	21,000
Relined Shoes Inst. (Car No. Wheels) % of Jobs	41,397,000 100.0	22,124,000 53.5	14,215,000 34.4	4,635,000 11.1	423,000 1.0
New Shoe Sets Inst. (Car No. Wheels) % of Jobs	13,518,000 100.0	6,170,000 45.7	3,377,000 25.0	3,729,000 27.6	242,000 1.7
Brakes Relined (Truck No. Wheels) % of Jobs	6,298,000 100.0	1,176,000 18.7	2,373,000 37.7	1,209,000 19.2	1,540,000 24.4
New Brakes Inst. (Truck No. Wheels) % of Jobs	2,609,000 100.0	288,000 11.1	908,000 34.8	753,000 28.8	660,000 25.3
Disc Brake Pad Sets Repl. (No. Wheels) % of Jobs	9,992,000 100.0	3,568,000 35.8	2,997,000 30.0	3,224,000 32.2	203,000 2.0

THE BRAKES AFTERMARKET

	SERVICE STATIONS	INDEPENDENT REPAIR SHOPS	CAR/TRUCK DEALERS	FLEET SHOPS
Universe	194,000	108,000	39,000	21,000
Relined Shoes Inst. (Car No. Wheels) % of Shops performing # of Shops performing # installed per year by shops installing	22,124,000 68.8 133,472 165.7	14,215,000 63.3 68,364 207.8	4,635,000 62.7 24,453 189.4	423,000 33.3 6,993 60.4
New Shoe sets Inst. (Car No. Wheels) % of Shops performing # of Shops performing # installed per year by shops installing	6,170,000 27.0 52,380 117.9	3,377,000 22.5 24,300 139.1	3,729,000 49.2 19,188 194.3	242,000 16.4 3,444 70.1
Brakes Relined (Truck No. Wheels) % of Shops performing # of Shops performing # installed per year by shops installing	1,176,000 11.0 21,340 54.9	2,373,000 24.5 26,460 89.8	1,209,000 34.3 13,377 90.5	1,540,000 66.1 13,881 110.9
New Brakes Installed (Trucks No. Wheels) % of Shops performing # of Shops performing # installed per year by shops installing	288,000 3.9 7,566 38.3	908,000 5.9 6,372 143.6	753,000 24.8 9,672 77.9	660,000 25.7 5,397 122.3
Disc Brake Pad sets Repl. (No. Wheels) % of Shops performing # of Shops performing # replaced by shops replacing	3,568,000 36.1 70,034 51.0	2,997,000 42.3 45,684 65.5	3,224,000 69.8 27,226 118.4	203,000 14.9 3,129 64.8

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THE MARKET BY ESTABLISHMENT SIZE

SERVICE STATIONS	by Station Size — Repair Volume in Thousands (add 000)												
	% Performing	# Performing (add 000)	Total Jobs Performed (add 000)	Under \$20.	% of Jobs	\$20-40.	% of Jobs	\$40-60.	% of Jobs	\$60-100.	% of Jobs	Over \$100.	% of Jobs
Refined Shoes Inst. (Car No. Wheels)	66.8	131	21,124	3,383	15.3	4,660	21.1	3,313	15.0	7,279	32.9	3,493	15.7
New Shoe Sets Inst. (Car No. Wheels)	27.0	52	6,170	856	13.5	703	11.4	1,308	21.2	803	13.0	2,460	39.8
Brakes Refined (Truck No. Wheels)	11.0	21	1,176	171	14.5	261	22.2	266	22.7	372	31.6	106	8.0
New Brakes Inst. (Truck No. Wheels)	3.9	8	288	60	20.8	66	22.0	84	29.1	78	27.0	8	8.0
Disc Brake Pad Sets repl. (No. Wheels)	36.1	70	3,568	479	13.5	638	18.6	591	16.5	1,300	36.4	500	14.0

INDEPENDENT REPAIR SHOPS	by Shop Size — Repair Volume in Thousands (add 000)												
	% Performing	# Performing (add 000)	Total Jobs Performed (add 000)	Under \$20,	% of Jobs	\$20-40,	% of Jobs	\$40-60,	% of Jobs	\$60-100,	% of Jobs	Over \$100,	% of Jobs
Refined Shoe Inst. (Car No. Wheels)	63.3	64	14,215	1,075	7.6	1,406	12.8	1,425	10.0	2,854	20.0	7,055	49.6
New Shoe Sets Inst. (Car No. Wheels)	22.5	24	3,377	348	10.4	391	11.6	574	16.9	1,047	31.0	1,817	50.1
Brakes Refined (Truck No. Wheels)	24.5	26	2,373	52	2.2	272	11.5	263	11.1	326	13.7	1,460	61.5
New Brakes Inst. (Truck No. Wheels)	5.9	6	808	157	17.3	126	13.8	312	34.5	31	3.4	281	31.0
Disc Brake Pad Sets repl. (No. Wheels)	42.3	46	2,937	155	5.2	263	8.8	353	11.8	615	20.5	1,611	53.7

NEW CAR/TRUCK DEALER SHOPS	by Shop Size — Repair Volume in Thousands (add 000)												
	% Performing	# Performing (add 000)	Total jobs Performed (add 000)	Under \$40	% of Jobs	\$40. - \$80.	% of Jobs	\$80. - \$150.	% of Jobs	\$150. - \$250.	% of Jobs	Over \$250.	% of Jobs
Refined Shoes Inst. (Car No. Wheels)	62.7	24	4,635	648	12.8	1,206	26.1	737	15.9	441	8.5	1,611	34.7
New Shoe Sets Inst. (Car No. Wheels)	49.2	19	3,729	249	6.7	1,815	27.3	757	20.3	596	15.9	1,112	28.8
Brakes Refined (Truck No. Wheels)	34.3	13	1,203	125	10.4	284	23.5	168	13.9	230	19.8	483	33.2
New Brakes Inst. (Truck No. Wheels)	24.8	10	753	136	18.0	146	19.3	100	13.4	133	18.0	236	31.3
Disc Brake Pad Sets repl. (No. Wheels)	69.0	27	3,224	147	4.6	600	18.6	638	19.8	344	10.8	1,491	46.2

FLEET SHOPS	% Shops Performing	# Shops Performing (add 000)	Total Jobs Performed (add 000)	by Type of Fleet (add 000)						by Size of Fleet (add 000)							
				Common	% of Jobs	Private	% of Jobs	Contract	% of Jobs	Government	% of Jobs	20-49 Vehicles	% of Jobs	50-150 Vehicles	% of Jobs	Over 150 Vehicles	% of Jobs
Refined Shoes Inst. (Car No. Wheels)	33.3	7	423	167	39.4	164	38.8	0	0.0	92	21.8	40	9.3	68	16.2	316	74.5
New Shoe Sets Inst. (Car No. Wheels)	16.4	3	242	22	9.0	116	47.8	0	0.0	104	43.2	39	16.1	51	21.9	150	62.0
Brakes Refined (Truck No. Wheels)	66.1	14	1,540	540	35.1	472	30.7	61	3.9	467	30.3	177	11.5	486	31.6	877	56.9
New Brakes Inst. (Truck No. Wheels)	25.7	5	660	153	23.1	333	50.5	6	1.0	168	25.4	87	13.2	222	33.7	351	53.1
Disc Brake Pad Sets repl. (No. Wheels)	14.9	3	203	56	28.3	72	35.3	2	1.2	71	35.2	29	14.2	42	20.6	132	63.2

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