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MAKING A CONNECTION

Autopromotec offers opportunities for those ready to accept the global challenge

BY MICHAEL WILLINS | Content Director, Automotive Group

Giovanni Pisi speaks broken English with an engaging Italian accent. Well dressed and confident, he sits, hands folded at a table hoping to find a U.S. distributor in the automotive sector. His 30-minute business-to-business meeting is not a make or break deal for his company, Fenice Care System S.p.A., but it's important. Like a speed dating event, the 30-minute B2B meeting is an

opportunity to determine mutual interest, and you can see in Pisi's eyes a hope for expansion.

On the other side of the table is Guy Bargnes, vice president of sales and marketing for Painters Supply & Equipment. Headquartered in Taylor, Mich., his company services the states of Ohio, Indiana and Michigan.

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Analysis by market

REPLACEMENT

Vendors: Aftermarket augments OEMs in delivering sophisticated police vehicles.

EMERGING

Technology: Leveraging data across the supply chain.

INTERNATIONAL

Vendors: Italy's Fiat charges ahead with star-studded marketing plans for new EV.

CUSTOMERS

Dealerships: Dealers, OEMs oppose car rental safety bill; cite unintended details.

Research

Auto Service Franchise Study: Auto service franchises experienced stable or increased sales and gross margins in 2012 and are optimistic about 2013.

Online Special Reports

FROST & SULLIVAN

Engines: The growing demand for diesel engines will cushion the market decline for remanufactured engines.

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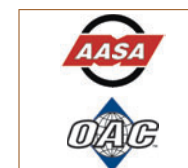
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Opinion



Donny Seyfer
The value of being a resource.



AASA's OAC
Buyers return to N.A. suppliers.



Bob Moore
Keep up, catch up or close up.



Mark Smith
Is it smart to act dumb?



Stephen Barlas
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MAKING A CONNECTION



I don't think it's easy to find unique opportunities. It is easy to find commodities.



Bargnes stares, listening intently as Pisi pitches the leather repair kit manufactured at his family's business near Venice. He uses a standard pitch about "high quality" shared by most suppliers. He notes that his company already has plans to open offices this summer in North Carolina, to support products they sell to furniture builders. He adds that Fenice already supplies tanneries that support the automotive OEMs in Europe. That's all fairly standard and run-of-the-mill.

Then he hits a nerve.

"We have just made a whole new set of videos with a very detailed procedure on how to use the product," Pisi says. "The main thing is to provide some training, because people are a bit scared about leather." Collision repair shops that follow the training can become "authorized repair centers," which opens up new sales opportunities for them.

The words cause Bargnes to shift in his chair as he realizes he may have something here.

"What interests me is bringing in new revenue opportunities for the body shops," he says.

"That's a big value to the customer."

Connecting the U.S. to the world

Business-to-business meetings connecting U.S. companies with foreign firms are a core value proposition for shows like Autopromotec. Hosted in Bologna, Italy, last May, the show attracted more than 100,000 attendees from 52 different nations. Held biannually, Autopromotec showcased the wares of 1,512 exhibitors and covered roughly 1.7 million square feet of space, including a large outdoor section for car wash equipment.

Emanuele Vicentini, brand manager for the event, says the show could be even larger, and make more money in the short-term, if organizers weren't so particular in their vetting process. The show turns away exhibitors not focused on quality, so as not to erode Autopromotec's long-term value, he said.

Launched in the mid-1960s, the show is owned by two associations – the Associazione Italiana Ricostruttori Pneumatici (AIRP) or Italian Tyre Retreaders Association,

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Guy Bargnes, left, meets with Giovanni Pisi during Autopromotec 2013.

and the Associazione Italiana Costruttori Autoattrezzature (AICA), the Italian Garage Equipment Manufacturers Association.

“The original idea to start a trade show was to promote (high quality) products,” says Vicentini, during a meeting in the show press center. “In the mid-60s, late 60s, there was no opportunity to promote their products here in Italy. The market was booming at the time.”

Fast forward nearly 50 years and visitors can see a bustling event. The 2013 exhibition saw a sizable increase in exhibitors for diagnostic equipment, as well as a strong showing among tire manufacturers.

Vicentini says in recent years Autopromotec has worked to align itself

with U.S. trade associations to encourage participation from buyers and exhibitors in the states. Representatives of the Automotive Aftermarket Industry Association (AAIA) and the Tire Industry Association (TIA) presented a joint seminar to help attendees understand the intricacies of the American market.

The show also is on the radar of the U.S. Department of Commerce, whose Consul for Commercial Affairs Michael Richardson attended Autopromotec to promote cooperation between show officials and American businesses. The DOC has “certified” Autopromotec, which basically means it gave its blessing that the event is worthy of attention for U.S. companies.

“We are very keen on providing support services to the U.S. companies,” says Richardson, who is based in Milan, Italy. The DOC wants to aid exporting and importing efforts of U.S. automotive firms. Many of its services are free, including market research, facilitating meetings and tapping firms into the Commerce Department’s Export Assistance Center.

The key is getting U.S. companies to understand the overall value shows like Autopromotec..CONTINUE READING □

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VENDORS

Italy's Fiat charges ahead with star-studded sales plans for new EV

BY JAMES E. GUYETTE
News Correspondent

Fiat's stock price recently rose to a two-year high as media outlets reported that talks were in "a decisive phase" over whether the Italian auto-maker will buy the remaining 41.5 percent of the non-Fiat ownership stake in Fiat/Chrysler. If the deal is sealed, the transaction would amount to more than \$3 billion.

TRENDS & MARKET Analysis

Founded in 1899, Fiat shipped its first car to the U.S. in 1908, exiting the American market in 1983. It began forming a global alliance with Chrysler in 2009 – gaining access to Chrysler's domestic distribution network while forging an agreement to produce fuel-efficient vehicles for the U.S.

This summer marks the debut of the 2013 Fiat 500e, a new electric vehicle initially set to go on sale in California with a marketing plan geared toward easing EV range anxiety while building a buzz among Hollywood movie stars and other celebrities.

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TARIK TAMAN
General Manager at Infor Inc.



How is your Learning Management Software system expected to benefit Hyundai's European operations?



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When fully charged the car is able to travel about 87 miles, "which is best-in-class and better than all U.S.-market all-electric vehicles produced by high-volume manufacturers," says Tim Kuniskis, the Fiat nameplate's senior executive in North America.

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“The marketing plan aims to ease EV range anxiety while building a buzz among celebrities.”

“For those times when a 500e customer needs to drive beyond the vehicle’s range or needs the carrying capability of a larger vehicle, the Fiat 500e retail plan provides an alternative transportation plan called the Fiat 500e Pass program,” he says.

Via a partnership with Enterprise Holdings – parent firm of Enterprise Rent-A-Car, Alamo Rent A Car and National Car Rental – the Fiat 500e Pass program annually offers buyers and leasees with up to 12 days of alternate transportation for three years following the purchase date.

Presented as a standard feature, customers will have access to vehicles such as the gas-powered Fiat 500, the upcoming Fiat 500L, the Dodge Dart or the Chrysler 200 mid-size sedan. They also have the option of upgrading to a larger vehicle such as a minivan or a pickup truck.

“This innovative idea,” says Kuniskis, “will provide purchasers of a new 500e with the opportunity to enjoy the exciting

characteristics of this all-electric vehicle while giving them a flexible alternative in case they want to drive beyond the vehicle’s range....By addressing upfront the concerns and anxiety consumers may have about purchasing an electric vehicle, we are helping to make it easy and convenient to purchase or lease a Fiat 500e in the State of California.”

The program will be valid at any Enterprise, Alamo or National rental center throughout the country. Enterprise has more than 6,200 locations in the U.S.

Italian style

Fiat’s 500e retailing plan “addresses concerns that have typically prevented some consumers from purchasing or leasing EVs in the past, including initial purchase price, driving range and the unfamiliarity with charging and operating an EV,” he says.

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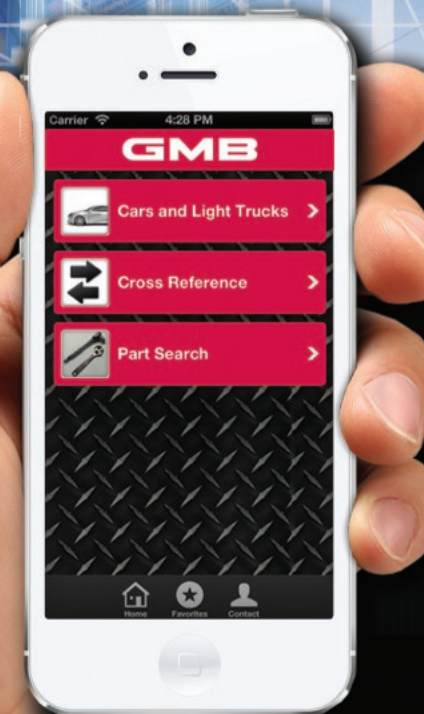


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VENDORS

Aftermarket delivers sophisticated police vehicles to OEMs

BY JAMES E. GUYETTE
News Correspondent

Advanced automotive technologies were in full force as an entire American city was placed under lockdown during the massive manhunt for the suspected Boston Marathon bombers.

Participating in the extraordinary search were specialized police battlewagons based on a Ford F-550 Super Duty chassis and upfitted by Lenco Industries, a global provider of law enforcement and military vehicles headquartered in Pittsfield, Mass.

TRENDS & MARKET Analysis

Accompanied by a fleet that included Ford P71 Crown Victoria police cruisers, the intense track-down was anchored by the \$1.3-million Massachusetts State Police Incident Command Center, an 80-foot-long trailer-and-tent complex brought to the scene by a Freightliner tractor rig.

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JEFF JURIST
President of Spy Associates



What are some of the more popular surveillance technologies that motorists have been purchasing the past few years?



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Authorities were also aided by the Mercedes-Benz mbrace tracking system, which had been activated after the carjacking victim was able to escape from his ML350 SUV and supply the PIN code.

Having this type of tracking technology

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“Some aftermarket operations specialize in upfitting law enforcement vehicles.”

was especially useful given the confusing layout of Boston’s cityscape, according to Patrick Cibotti, owner of Boston Body Works. While modern-day thoroughfares have been constructed over the years, some of the traffic patterns date back to when the original village was specifically designed to repel – or at the very least confuse – a menacing invasion force.

“It started in Revolutionary times; there was no main street so an army couldn’t march through town,” Cibotti explains. “There are still a lot of those old streets that ‘lead to nowhere’ that are still here.”

The 15-bay shop is located a scant six blocks from the marathon’s finish line. “A friend of mine was right on the scene, and he had invited me to watch the race,” Cibotti recounts. He instead begged-off to bid at a nearby car auction, where “I saw a big puff of smoke” as the explosions went off. “It was a scary time.”

As the subsequent manhunt unfolded an automated police telephone message urged everyone to either stay at home or remain where they were at that time. The Boston Body Works staff elected to stay on-site with the option of evacuating if instructed by authorities. “They drove by and didn’t even look at us. It was a ghost town,” says Cibotti. “We had the TV on all day and we were glued to it.”

Lucrative niche

As with many shops throughout the country, Boston Body Works routinely repairs local police cars brought in for service.

Some aftermarket operations specialize in upfitting law enforcement vehicles, and these shops often market a line of police and firefighting equipment to facilitate the modifications taking place in the bays.

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TECHNOLOGY SOLUTIONS

Aftermarket supply chain challenge

Aftermarket companies will need to leverage more data across the supply chain

BY BRIAN ALBRIGHT
Contributor

In the retail and consumer package goods market, data management has been at the heart of inventory and forecasting improvements for more than a decade. In the aftermarket, however, many companies are only now coming around to the idea that the massive amounts of data generated at the point of sale should be leveraged to manage what inventory goes where, from the point of manufacture to the shelf.

TRENDS & MARKET Analysis

At the Aftermarket eForum conference May 22-23 in Chicago, four experts from every level of the supply chain converged for a panel discussion to talk about the way the industry can embrace better data management. Increasingly, the aftermarket will need

to leverage Big Data to get a better handle on forecasting and inventory management to reduce returns, reduce inventory costs, and to make sure inventory is positioned properly at the store/installer level. In an industry trying to adapt to both an exploding SKU count and increasing number of low-volume parts, a data-based approach to inventory is critical.

That requires increased visibility, says Rod Bayless, product director at Epicor. "If you can't see what's going on in the channel, you can't measure it, and you can't do anything about it," Bayless says.

"If we can't provide correct data, we can't make a sale," adds Mike Buzzard, director of marketing at Uni-Select. "When you tie this to revenue, people start to pay attention to it."

Technology Newsmaker

Q&A

WARREN SMITH
Industry Director for
Automotive and Motor
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Because Ferrari vehicles are all highly customized, how exactly was Ferrari able to streamline their manufacturing?



What did Smith say? Continue reading online.

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The problem with current forecasting models, though, is that the aftermarket channel is full of low-volume products that don't generate enough sales data to provide an accurate picture of demand. Bayless characterizes this

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“If you have bad data, it can cause a lot of unnatural acts to occur related to inventory.”

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as a business intelligence gap. “The forecasts are starving for data,” Bayless says. “Traditional analytics don’t work at the end of the channel. You don’t know enough to compete, and you need help.”

Program groups are investing in inventory visibility and forecasting technology, layering a variety of data into proprietary forecasting tools to help distributors and jobbers better match their inventories to actual demand. That includes vehicle registration data and replacement rates, but for the data to be truly useful, regional knowledge has to be integrated. That could, conceivably, even include search engine data related to specific repair problems.

“We’re starting to get where we can forecast for specific regions more accurately,” Bayless says. Better visibility could even help manufacturers know when they have over-produced certain parts.

Another problem is the lack of consistency when it comes to data quality. While adherence to the industry data standards has improved, suppliers and distributors are still finding hundreds or even thousands of mismatched SKUs in their databases. That poor data can lead to a

“bullwhip” effect in the supply chain, causing wild swings in demand and increases in safety stock. “If you have bad data, it can cause a lot of unnatural acts to occur related to inventory,” says Steve Sigg, e-business manager at AC Delco.

AC Delco has been engaged in a master data management (MDM) project, leveraging the PIES and ACES standards, to clean up its own product data. Internal testing showed that the company had thousands of mismatched part numbers moving between the company and its distributors, and the problems were split evenly down the middle; some of the bad numbers came from AC Delco, others from the its distributors themselves.

“Our focus has been on getting our own data in sync internally,” Sigg says. He added that segmenting data by type of customer is also important; otherwise it’s difficult to leverage the data in meaningful ways when it comes to re-allocating inventory.

While more companies now use the PIES and ACES standards,
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DEALERSHIPS

Dealers, OEMs oppose car rental safety bill; cite unintended details

BY BRIAN ALBRIGHT
Contributor

In May, the U.S. Senate transportation committee's consumer protection subcommittee held hearings on a rental car recall safety bill that could have significant implications for dealer service departments, rental companies, and auto repair and body shops that rent or loan cars.

TRENDS & MARKET Analysis

The bill (S. 921) would bar the rental or sale of cars that are "subject to safety recall," and authorizes the National Highway Traffic Safety Administration (NHTSA) to investigate and oversee rental car company procedures for recalls. The bill is named the Raechel and Jacqueline Houck Safe Rental Car Act of 2013, in memory of two sisters who died in a car crash in 2004 involving a rental car that had been recalled. The accident was attributed to a steering hose defect in the vehicle.

If passed as written, any company offering rental or loaner cars would have to ground any vehicles subject to a recall notice until the defect was repaired. The bill is co-sponsored by Senators Barbara Boxer (D-Calif.), Clair McCaskill (D-Mo.), Roy Blount (R-Mo.) and Chuck Schumer (D-N.Y.)

All recalls treated equally

The bill has gained reluctant support from the bulk of the rental car industry, although the American Car Rental Association (ACRA) has characterized the bill's scope as too broad. Last year, the four major rental car companies agreed to voluntarily follow the general principles of the bill.

Auto dealers, which often operate small fleets of rental or loaner cars, as well as an OEM trade association, testified in opposition. While both groups agree with the principle of the legislation, they were concerned about unintended consequences.

"I would like to make one thing perfectly clear: America's franchised new

car dealers support the purpose behind S. 921," said Peter Welch, president of the National Automobile Dealers Association (NADA) at the hearing. "Vehicles that are not mechanically sound or are unsafe to operate should never be rented to members of the public. Not only is it irresponsible, the legal liability for doing so is so severe that it would bankrupt most of our members."

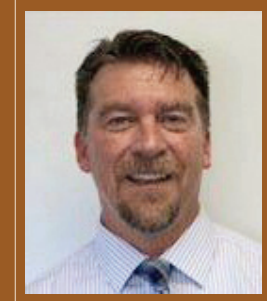
However, Welch said that NADA was concerned large fleet operators would use their economic clout to push themselves to the front of the line when it came to recall repair work, to the detriment of individual vehicle owners. Even if dealers and OEMs did not give rental fleet operators special treatment, they could conceivably clog the repair pipeline because all vehicles would need to be repaired simultaneously to avoid the fleet owner suffering significant economic losses.

“Any company would have to ground its recalled rental or loaner cars until recall items were fixed.”

Dealer Newsmaker

Q&A

REX WEAVER
Service Director,
Rothrock Motors



Why did you start using this fixed-job-rate approach for service advisor and technician compensation?



What did Weaver say? Continue reading online.

[Read full interview](#)

"These businesses, which may have affected vehicles sitting unrented on their lots, should not be allowed to 'jump the line' ahead of individuals that rely on their vehicles ...**CONTINUE READING** ▢

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Keep up, catch up or **CLOSE UP**

Consider that in 1965, Fotomat Corporation introduced the first overnight film processing service. In 1972, Polaroid introduced the SX-70, the first “pocket sized” instant camera. In 1995, the first digital cameras were introduced, and film processing rapidly started to disappear. By the late 1990s the first cell phones with cameras began to appear. This year, 85 percent of all mobile phones sold have embedded cameras.

And the morning that I wrote this column I learned that the *Chicago Sun-Times* laid off its entire photography staff, in favor of using reporters, freelancers and reader-submitted images.

So, in the span of just over 40 years, we have gone from waiting a week to get prints of the pictures we took, to a major metropolitan daily newspaper firing its staff photographers in favor of others submitting their digital images. That’s a stunning change in a stunningly fast time. And like most changes in our lives these days, it is driven by technology.

But technology has a partner in propagating change: the Internet. As technological innovation occurs, the Internet brings it to millions of consumers almost instantaneously. As we are exposed to new

and better technology, we assimilate it into our lives and it raises our collective expectations of “the new normal.” This cycle then repeats and exposure to, and expectations of, all things technology increases.

I make this point because some of us have a tendency to think the aftermarket is somehow able to resist change, or perhaps more accurately, to think change occurs more slowly in our space. That, I think, is a dangerous notion.

Consider that as recently as the late 1980s, the majority of counter people looked up parts from printed pages bolted into long catalog racks. By the mid 1990s we were staring at green screens with year/make/model lookups. Ten years later a majority of parts stores had Internet connections that enabled full graphic display of digital images. We are now moving to catalogs that are centrally located so they can be updated in real or near-real time.

Technology is not only producing change – it is profoundly affecting the rate of change. Consider that paper catalogs and price sheets were the mainstay for about 80 years; green screens were prominent for about a decade; dumb terminals feeding from a “mainframe” fell into the timeline for about five

“Technology has a partner in propagating change: the Internet.”

years or so; and most recently we’ve all been using PC-based systems.

As diverse in nature and function as all of these approaches were, they had one thing in common. Each individual company relied on data that resided in its own system and was refreshed occasionally. Today we’re seeing mass migration to centralized databases and software that ...CONTINUE READING ▢



BOB MOORE
President, Bob Moore & Partners

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Buyers return to **N.A. SUPPLIERS**

“New car sales are limited and the average car age in Mexico is 13.7 years.”

A positive trend seems to be emerging among international buyers: a return to sourcing aftermarket products from North American suppliers rather than low cost countries (LCC) due to concerns about LCC product quality. This trend was reported during the “How’s Global Business” roundtable discussion by the Board of Governors of the Overseas Automotive Council (OAC) of the Automotive Aftermarket Suppliers Association (AASA).

As a regular activity at its meetings, the AASA OAC Board conducts a roundtable discussion of the latest business trends from around the world. Here are some global market highlights from its recent meeting:

Venezuela

The country’s marketplace is currently experiencing tremendous uncertainty due to the change in governmental control following the death of its long-time leader, Hugo Chavez, and its huge debt levels. The uncertainty in Venezuela also is impacting business in many other Latin American countries.

In the Venezuelan aftermarket, orders are starting to increase again after being almost non-existent for the last four months, reflecting a huge pent up demand for inventory. An additional cause of concern in the

Venezuelan economy is the conversion from the current currency auctioning process of CADIVI to the new SICAD program. For more details about this click here: <http://reut.rs/19PrzAS>

Mexico

The Mexican market is very strong, reporting sales into the country 15 percent to 20 percent above 2012. The country’s aftermarket is very active due to the Mexican car parc – new car sales are limited and the average car age in Mexico is 13.7 years, according to the University of California Transportation Center.

According to the OAC, growth in distributor program group participation in Mexico and South America is on the rise. OAC board members report that program groups are asking for the same programs and pricing in Mexico that their U.S. groups receive from manufacturers. This is creating a difficult situation for U.S. manufacturers, which have different pricing and marketing

programs for international customers than for their U.S. customers.

Brazil

The Brazilian market is strong due to a growing economy – and more growth is expected as the country prepares to host the 2014 Soccer World Cup and 2016 Summer Olympics. Its aftermarket infrastructure also is growing. AutoZone has located at least 10 stores in Brazil currently and has aggressive expansion plans to add more when those are established

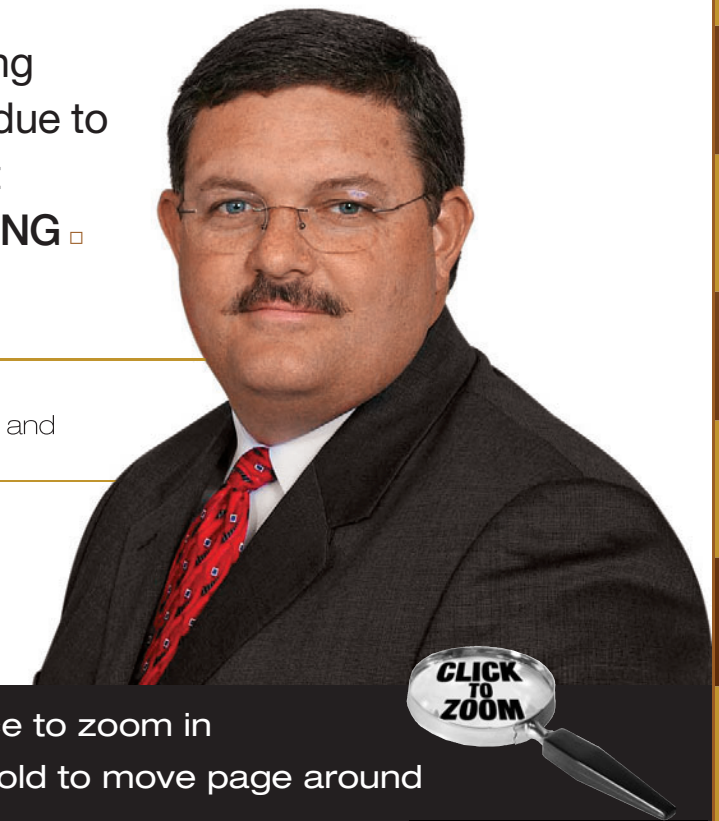
Other International Market Insights

- Argentina: Doing business is difficult due to the country’s import

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DAN PIKE

Vice President, Membership and Member Services, AASA



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Is it smart to act **DUMB?**

“The article said having ‘stupid’ employees can actually boost productivity and overall profit.”

One of my constant concerns is our perception versus the competition’s perception in our community and amongst our potential new customers. I am often befuddled because most of my new customers are those who have been “around the horn” looking for items that are either hard to find, or require a skill level my competitors have not yet acquired.

Before I continue, let me pose this query: If your business has been around for decades, you have the most intelligent staff, a resource base for getting special order items that is unparalleled, and a reputation at the pinnacle of professionalism, yet, many of your new loyal customers come by happen-stance, or in other words, they show up in such a haphazard fashion that you begin to question, why even advertise?

To add more salt to this wound, nine out of 10 times, your prices are better than the competition! Evidence of this little nugget of confusion is apparent in how many times you price an in-stock item to a potential customer, only to have your competition call to verify the price you gave in order for them to price match.

What? Did my people have horrible body odor, bad breath, too many or not enough tattoos? For the record, we all practice good hygiene, and our body art is quite tasteful, well balanced and demographically correct.

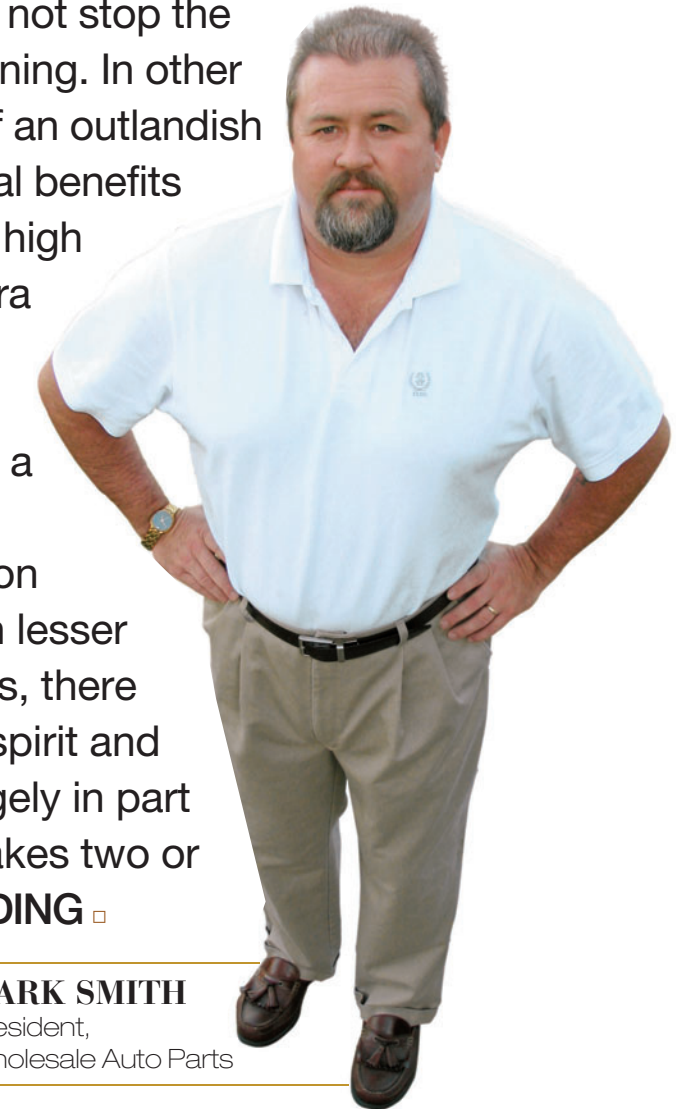
Recently, I read an article about how having “stupid” employees can actually boost productivity and overall profit. When I read the title of the article, I thought to myself, “if that’s the case, this writer must be the most prolific journalist in modern media history, because anyone that would write an article like this is an idiot.”

Anticipating a detailed, confounded, anti-populist argument to support such a nonsensical title, I settled into what I expected to be a humorous read. As it turns out, not the first thing was humorous. It was a very serious and detailed article delving into psychological reasoning that scientifically proves that having a bunch of “smart or otherwise intelligent” employees leads to arguments and disagreements of minor details of running the business, responsibilities of employees, lack of recognition vs. standards of self worth, and in general, bickering. In layman’s terms, it’s a perfect description of

too many chiefs, not enough indians.

The flip side details that the “dull” knives inability to filet a fish will not stop the fish fry from happening. In other words, their lack of an outlandish skill-set yields equal benefits without paying the high cost for a set of ultra sharp Chicago Cutlery knives, thus more profit as a by-product.

The article went on to explain that with lesser talented employees, there is more of a team spirit and work ethic due largely in part to the fact that it takes two or ...CONTINUE READING ▢



MARK SMITH
President,
Wholesale Auto Parts

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The value of being a **RESOURCE**

When you sit in the chair I do there is a hat rack right next to you because of the need to change them all the time. Sometimes knowing which hat gets the job done is a challenge.

Sitting in front of me now is a work order for a supercharged 2002 Chevy Tahoe that has a blown out header gasket, a 1968 Thunderbird that needs an exhaust system and a late model Jeep with a PCM that's no longer available.

Because I work on cars from the 1940s to the early 1970s and then from the mid 1990s to current, my vendor list is huge. Much of that vendor list is due to my research in finding vendors who sell parts for Studebaker Avantis for example.

Many of my vendors are the result of an introduction from one of my main vendors.

One day I needed a water pump for a 1971 Coronet with a 440 and could not find one through any of my traditional suppliers. I called my main supplier to see if they had any ideas. One of their counter guys suggested a company here in Denver that rebuilds water pumps. I got it taken care of. They even offered to take it to the sublet vendor and return it to me. It worked out that I did not need that service but that is the reason that they are my first call. Not because they are big or have every part every time or give me the best deal. It is just because they provide that extra service.

Let's face it, the employee could simply have taken my call as so many do and said, "We don't have that," and moved on. It probably would not have affected our relationship negatively. The approach he took was to take a couple minutes of his time to look up the information on a supplier he was aware of and give it to me. This had a positive affect on our relationship. Call it a Karma savings account for when I am in their portal and they do not have something I think they should.

Supplier/buyer relationships are much like that game we played when we were kids; "Break the Camels Back" where you add or subtract sticks to keep the camel upright. Constant returns or ASAP orders tend to annoy the supplier and the inability to source parts quickly will cause service advisors or parts people to look elsewhere. Suppliers often go to superhuman ...CONTINUE READING ▢



DONNY SEYFER
Operations Manager
Seyfer Automotive, Inc.



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Auxiliary Lighting PHILIPS

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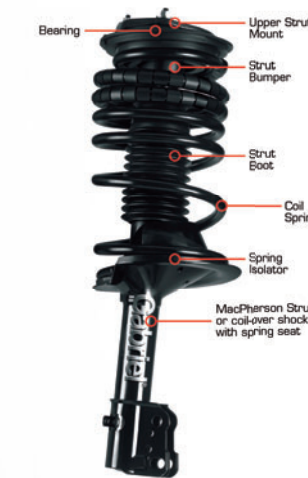
Brakes RAYBESTOS

each new design to ensure function, proper wear and durability. Finally, engineers do a complete teardown analysis to certify there is no excessive wear on components.

Then, Gabriel takes it a step further by Fit-testing and Ride-testing each new design on the same vehicle application for which it was designed to ensure faster installations, fewer comebacks and an ideal fit.

Not all manufacturers go to these lengths to test their products and if they did, they might not like what they'd find. But it's the right thing to do and the right way to do it. We think it's what you should expect, especially from the company that designed the first automotive shock absorber in 1907.

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PROMISING OUTLOOK

AUTO SERVICE FRANCHISES ARE
CONFIDENT ABOUT 2013 SALES, MARGINS

BY BRUCE ADAMS | Managing Editor



Auto service franchises experienced stable or increased sales and gross margins in 2012 and are optimistic about 2013 sales and margins, according to the Aftermarket Business World Auto Service Franchise Study.

Forty-eight percent of respondents said they experienced a sales increase in 2012 and 44 percent said their sales stayed the same as the previous year. Fifty-three percent expect sales to increase in 2013, while 42 percent expect sales to stay the same.

That optimism is reflected in 2013 gross margins as 51 percent expect to increase their margins in 2013, while 45 percent anticipate that their gross margins will match 2012.

Quality and availability tied as the top needs of their customers, as 27 percent of respondents cited each trait. Price was a close sec-

ond at 24 percent. OEM fit and function came in third at 18 percent.

When it comes to marketing, 77 percent consider their own recommendation to be their most effective marketing tool. Ten percent said it was in-store displays, while only 3 percent cited social media.

When it's time to order parts 48 percent order electronically while 40 percent use the phone. Auto service franchise respondents said their preferred suppliers were auto parts retailers (36 percent), warehouse distributors (27 percent), jobbers (23 percent) and OEM parts providers (11 percent).

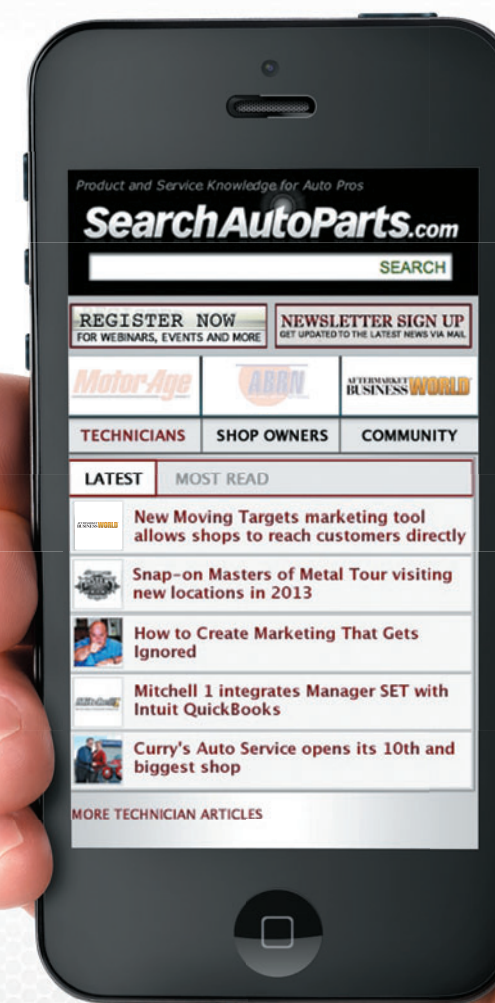
METHODOLOGY: *The Aftermarket Business World Auto Service Franchise study was fielded to readers of Motor Age magazine via email. Survey results are intended to show general market trends, not statistical certainties.*

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Auxiliary Lighting

Needs of customers

Quality	23%
OEM form fit and function	27%
Availability	24%

Most effective marketing tool

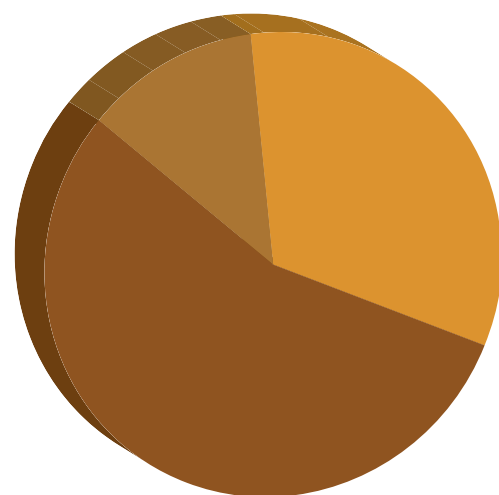
Their recommendation	55%
In-store displays	18%
Quality	12%

2012 auxiliary lighting sales

33%
Increased

55%
Held Steady

12%
Decreased



42% of auto service franchises report that they order this product from suppliers electronically.

PROMISING OUTLOOK



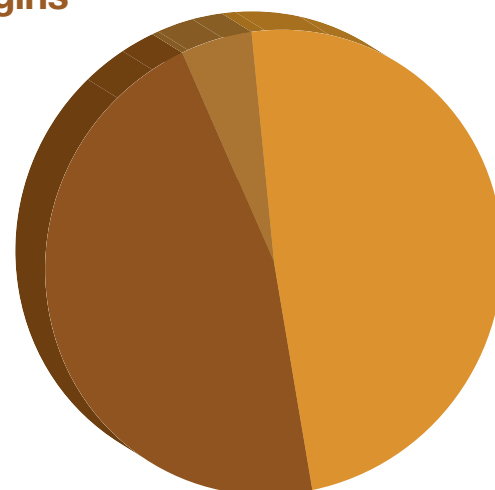
77% of auto service franchises report that they stock this product on an as-needed basis.

Expected 2013 gross margins

49%
To Increase

46%
To Hold Steady

5%
To Decrease



2013 auxiliary lighting sales expectations

To increase 1-10%	30%
To increase 11-20%	10%
To hold steady	54%
To decrease 1-10%	5%

28%
report that

OTHER SERVICE REPAIR FRANCHISES

are the main competitors when selling this product.

Preferred supplier

Jobber	20%
Warehouse distributor	24%
Auto parts retailer	36%
OEM parts arm	11%

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Brakes

Needs of customers

Quality	39%
Price	28%
Availability	17%

Most effective marketing tool

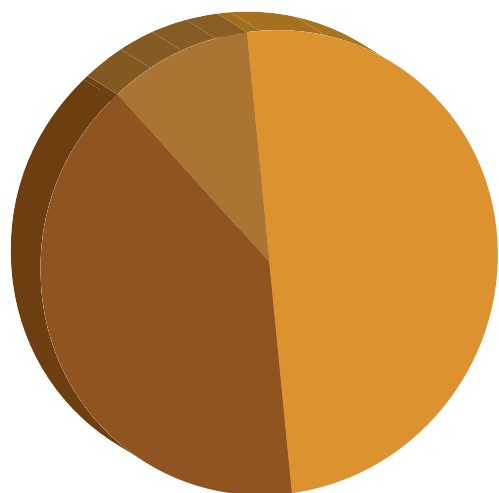
Their recommendation	85%
In-store displays	6%
Other	9%

2012 brake sales

50%
Increased

40%
Held Steady

10%
Decreased



43% of auto service franchises report that they order this product from suppliers electronically.

PROMISING OUTLOOK



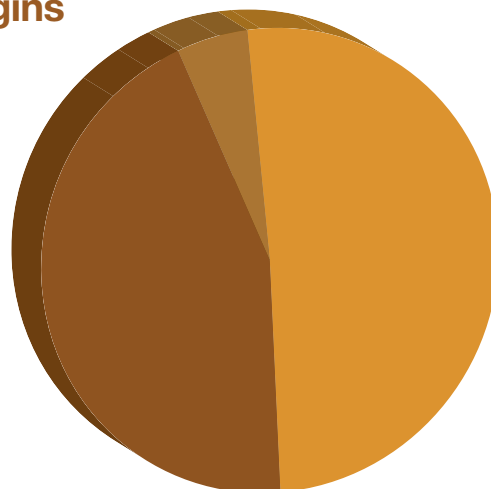
74% of auto service franchises report that they stock this product on an as-needed basis.

Expected 2013 gross margins

51%
To Increase

44%
To Hold Steady

5%
To Decrease



2013 brake sales expectations

To increase 1-10%	43%
To increase 11-20%	12%
To hold steady	39%
To decrease 1-10%	5%

Preferred supplier

Jobber	25%
Warehouse distributor	22%
Auto parts retailer	44%
OEM parts arm	9%

39%
report that

INDEPENDENT REPAIR SHOPS

are the main competitors when selling this product.



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Cabin Air Filters

Needs of customers

Price	28%
OEM form fit and function	22%
Availability	35%

Most effective marketing tool

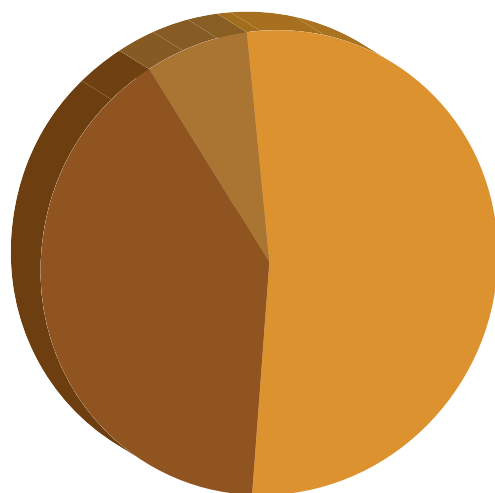
Their recommendation	80%
In-store displays	10%
Other	10%

2012 cabin air filter sales

53%
Increased

40%
Held Steady

7%
Decreased



57% of auto service franchises report that they order this product from suppliers electronically.

PROMISING OUTLOOK



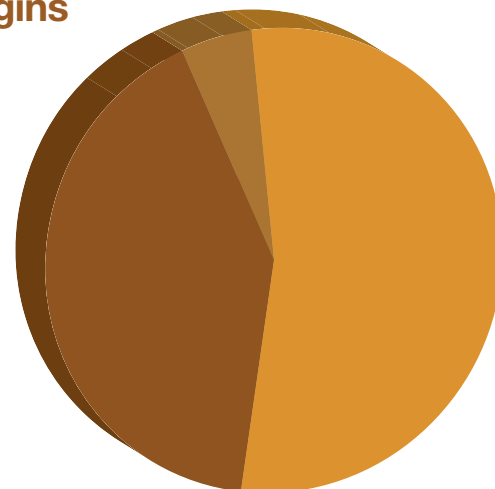
69% of auto service franchises report that they stock this product on an as-needed basis.

Expected 2013 gross margins

54%
To Increase

41%
To Hold Steady

5%
To Decrease



2013 cabin air filter sales expectations

To increase 1-10%	49%
To increase 11-20%	17%
To hold steady	29%
To decrease 1-10%	3%

31%
report that

OTHER SERVICE REPAIR FRANCHISES

are the main competitors when selling this product.

Preferred supplier

Jobber	21%
Warehouse distributor	28%
Auto parts retailer	38%
OEM parts arm	11%



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Chassis

Needs of customers

Quality	29%
Price	22%
Availability	24%

Most effective marketing tool

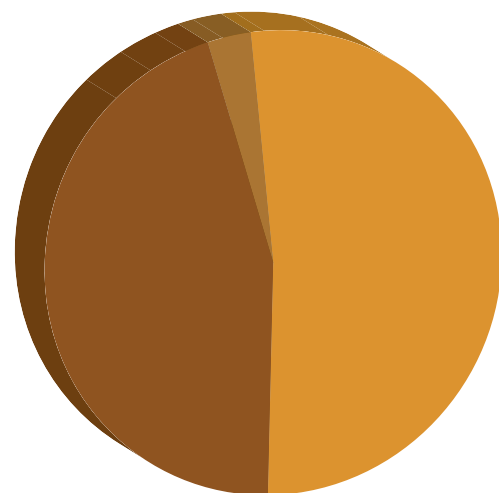
Their recommendation	78%
In-store displays	10%
Other	12%

2012 chassis sales

52%
Increased

45%
Held Steady

3%
Decreased



48% of auto service franchises report that they order this product from suppliers electronically.

PROMISING OUTLOOK



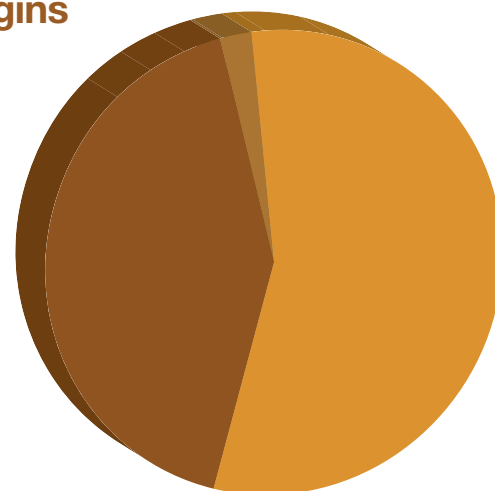
86% of auto service franchises report that they stock this product on an as-needed basis.

Expected 2013 gross margins

56%
To Increase

42%
To Hold Steady

2%
To Decrease



2013 chassis sales expectations

To increase 1-10%	44%
To increase 11-20%	9%
To hold steady	44%
To decrease 1-10%	2%

30%
report that

OTHER SERVICE REPAIR FRANCHISES

are the main competitors when selling this product.

Preferred supplier

Jobber	26%
Warehouse distributor	24%
Auto parts retailer	35%
OEM parts arm	12%

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Fuel Pumps

Needs of customers

Quality	28%
Price	23%
Availability	24%

Most effective marketing tool

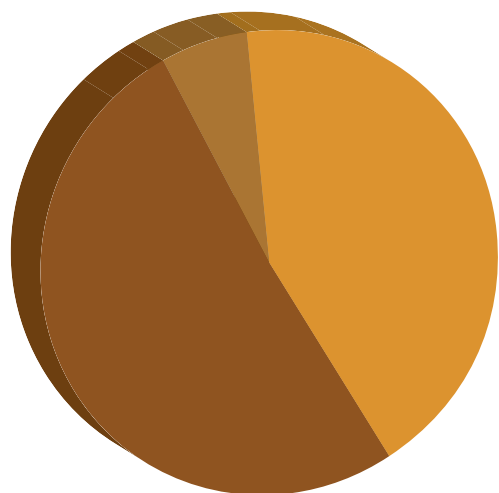
Their recommendation	84%
In-store displays	4%
Other	12%

2012 fuel pump sales

43%
Increased

51%
Held Steady

6%
Decreased



44% of auto service franchises report that they order this product from suppliers electronically.

PROMISING OUTLOOK



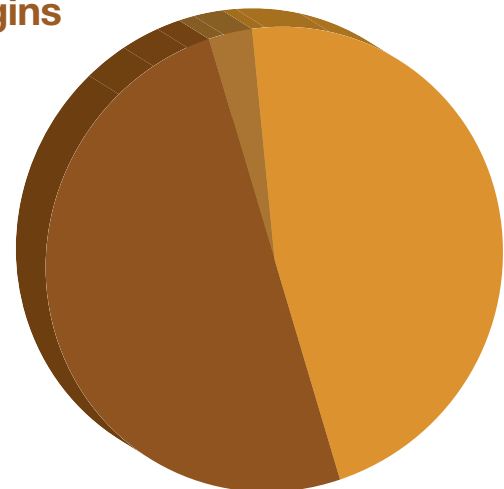
91% of auto service franchises report that they stock this product on an as-needed basis.

Expected 2013 gross margins

47%
To Increase

50%
To Hold Steady

3%
To Decrease



2013 fuel pump sales expectations

To increase 1-10%	39%
To increase 11-20%	2%
To hold steady	54%
To decrease 1-10%	4%

44%
report that

INDEPENDENT REPAIR SHOPS

are the main competitors when selling this product.

Preferred supplier

Jobber	22%
Warehouse distributor	23%
Auto parts retailer	34%
OEM parts arm	21%

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Wipers

Needs of customers

Quality	35%
Price	25%
Availability	27%

Most effective marketing tool

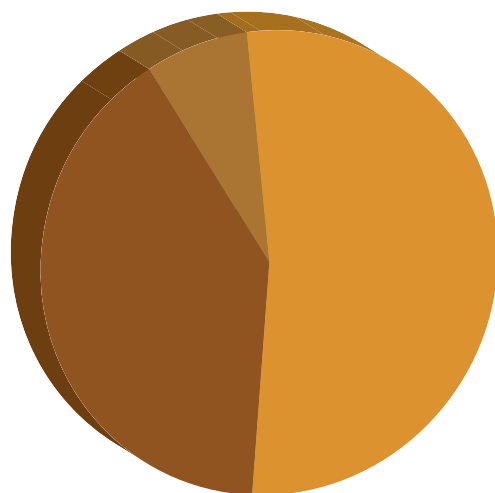
Their recommendation	82%
In-store displays	10%
Other	8%

2012 wiper sales

53%
Increased

40%
Held Steady

7%
Decreased



46% of auto service franchises report that they order this product from suppliers electronically.

PROMISING OUTLOOK



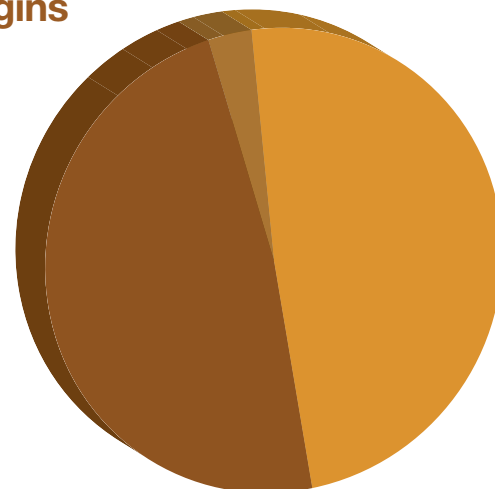
49% of auto service franchises report that they carry enough product for the most popular makes and models.

Expected 2013 gross margins

49%
To Increase

48%
To Hold Steady

3%
To Decrease



2013 wiper sales expectations

To increase 1-10%	44%
To increase 11-20%	10%
To hold steady	42%
To decrease 1-10%	2%

31%
report that

MASS MERCHANDISERS

are the main competitors when selling this product.

Preferred supplier

Jobber	27%
Warehouse distributor	36%
Auto parts retailer	30%
OEM parts arm	6%



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