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The Automotive Aftermarket Industry Association recently awarded tascosalesreps the 2013 Head of the Class Award for the manufacturer's representative segment. The award recognizes companies that invest in employee education and training. "Our team members are individuals who strive for excellence. Each employee dedicates time to training and understanding the market. We are truly humbled by the recognition and award," said Cal Wilkins, President and Chief Executive Officer of tascosalesreps.

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DID SOMEBODY SHOUT FIRE?

Parts store owner thanks customers after fire

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TRENDING

NEW WAVE OF FANS EYE ELECTRIC CARS

Sales of Nissan Leaf up 335 percent since March

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Mighty Auto Parts recognized the charitable work of Boyd's Tire and Service Centers of Columbus, Ohio.
[KEY: Mighty Auto]

BOND AUTO PARTS PICKS MAM SOFTWARE FOR ITS 45 STORES
Bond will use it to manage more than 45 store locations throughout Vermont, Massachusetts, New Hampshire and New York.
[KEY: Bond Auto Parts]

DENSO TO FORM STRATEGIC ALLIANCE WITH SHARP CORP.
DENSO and Sharp will collaborate to create new technologies to improve the comfort, safety and convenience of vehicles.
[KEY: DENSO to form]

ONLINE COVERAGE

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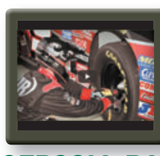

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TRENDING

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BY **BRIAN ALBRIGHT** | CONTRIBUTING EDITOR

36 Distributor's inventory optimization tool boosts independent jobbers' sales.

Read It On ***AftermarketBusiness.com***

MEMA NAMES STEVE HANDSCHUH PRESIDENT, CEO

MEMA named Steve Handschuh as the association's president and CEO effective Oct. 1, 2013.

[KEY: MEMA names]

AUTOMECHANIKA ISTANBUL SET FOR APRIL 2014 IN TURKEY

Automechanika Istanbul will open its doors from April 10 to 13, 2014 in Turkey.

[KEY: Automechanika]

AUTO SUPPLIER M&A ACTIVITY TO DROP IN 2013, PWC SAYS

Merger and acquisition activity will decline about 25 percent in 2013, with 180 auto supplier deals globally.

[KEY: Auto supplier]

ADVANSTAR AUTO

american business media

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AFTERMARKET INDUSTRY

STATS & TRENDS

The untapped market of unperformed and underperformed auto maintenance represents 27% of the total after-market potential.

FROM THE BLOG SPHERE

Did somebody shout fire?

Parts store owner thanks customers for support following devastating fire

BY **MARK SMITH** | WORKSHOP MEMBER

Our business is recovering from a devastating fire on June 6 that destroyed our parts showroom and warehouse.

I have written several articles in *Aftermarket Business World* about the fire, loss of employees and insurance challenges. Despite that, the overwhelming despair is hard to describe appropriately.

It's definitely not how I wanted to spend our summer. We scrambled to re-open a store front at the very least so that we could have an office/waiting area to facilitate re-opening our service center. The first few weeks of this soap opera were a living hell. I've been humbled, bewildered, angered, stupefied and sometimes amazed at the things we were and still are faced with.

As heartbreaking as it's been, I feel like an expert now in regards to the do's and don'ts in response to this tragedy. Regardless of all the highs and emotional lows, there is one thing that remains the same – your customers.

Since we have been in the community since 1988, we've made more friends than enemies, thankfully. I had customers from radio deejays,

BEST OF THE BLOGS

AFTERMARKET BUSINESS WORLD

BECOME A BLOGGER *AFTERMARKETBUSINESS.COM/BestBlogs*

*BEST OF THE BLOGS are written by bloggers on **AMB World's** community pages.*

Peter
WAGNER'S NEW OE21 LOW COPPER FRICTION FORMULATION

Both California and Washington state have passed laws requiring brake manufacturers to reduce the copper content in their brake friction material. By 2021, they must be less than 5% copper, and by 2025 the limit is 0.5%! The reason? Pad material that wears off as the brakes are used are collecting on the roadways and eventually being washed into the waterways and posing a threat to aquatic life. Wagner is a leading supplier to the OEMs and has been producing this low copper formulations for some time now, but have just made this available to the independent shop and DIYer.

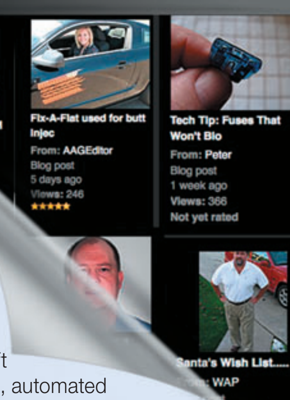
The new Wagner ThermoQuiet CeramicNXT with OE21 low-copper brake pad is better for the environment and offers across the board performance characteristics - quieter performance, better stopping power, less fade and dusting.

Brian Albright
DRIVERS OPEN TO INSURANCE TELEMATICS PROGRAMS

A new survey from Towers Watson indicates that drivers are becoming more open to the idea of usage-based insurance (UBI) offerings that allow insurance companies to track driver behavior using telematics devices.

Around 80% of respondents to the UBI Consumer Survey said they would either buy or consider such a policy; if insurers were able to guarantee their premiums won't rise, that number shot up to 89%.

Younger drivers were the most interested (66%). Drivers were also interested in other value-added services that could be enabled via the telematics devices, such as vehicle theft tracking (83%), automated emergency response (82%), and vehicle wellness reports (79%).



"Many major auto insurers already offer UBI policies, though consumer adoption has been slower," said Robin Harbage, global lead for Towers Watson's UBI practice and DriveAbility service offering.

to contractors, to doctors, dentists, stay-at-home moms and general loyal customers offer help in the way of money, free labor, meals, building and assembling shelves, mowing, and in general, just plain-old hard labor to get us back up and running.

Your customers mean everything to you, but don't forget those relationships mean something to them as well. As we prepare to reopen, my goals and priorities will be reflected.

AFTERMARKET BUSINESS WORLD™ TOP VIDEOS

MOST WATCHED VIDEO

Bosch/OTC's Ed Carpenter on technology of the scan tool

MOTOR AGE TECHNICAL EDITOR PETE MEIER INTERVIEWS ED CARPENTER AT THE ASA ILLINOIS CHICAGO AUTOMOTIVE NETWORKING CONFERENCE.

Aftermarketbusiness.Com/video4

Your social media strategy

With a little work on the front end, you can run a successful and engaging social media campaign.

AftermarketBusiness.com/video5

Ingersoll Rand celebrates 10-year anniversary of tool

The company marks the 10th anniversary of its 2135Ti Titanium 1/2" impact tool.

AftermarketBusiness.com/video6

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Noteworthy

comments from AMB World's online communities

Each month we scan our Workshop community and our pages in Linked-In, Facebook and Twitter to see what you're saying. Comment there to be heard.

NAPA Auto Parts:
Fast N' Loud from the Discovery Channel revs you up with a 5-part web series with NAPA parts & tips.

Toyota USA:
Build a NASCAR themed backyard and you never know who might show up. Like, say Kyle Busch.

General Motors:
Inaugural summer of GM Student Corps taught Detroit student interns valuable skills like leadership & community service.

Mitchell1:
Are you all set for Car Care month? The Car Care Council Industry Tool Box can help drive more business to your shop.

Auto Alliance:
Automakers mine supply chain to uncover and report on "conflict minerals" as per new rule.

Frost & Sullivan:
Demand for enhanced quality of experience shows need to test cloud infrastructure for performance, security & reliability issues.

Harris Garage
A clogged evaporator, orifice tube or condense can make your AC unit work harder and with complications.

AAIA
Aftermarket Web Services Provide Functionality Comparable to EDI.

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2013 WEBCAST SCHEDULE

NOVEMBER 2013
Electrical Testing Techniques
Produced in cooperation with TST.

DECEMBER 2013
General Transmission Diagnostic Tips
Produced in cooperation with ATSG.

FROM THE ARCHIVES
Cooling System Service and Testing
Produced in cooperation with TST.

FROM THE ARCHIVES
Reading Wiring Diagrams
Produced in cooperation with ATSG

STREAMING PROGRAMS

Building a Winning Team for Your Auto Shop Episode 3
Surveying and finding out what good technicians need from an employer.

Drive Radio: Pet Peeves, Winter Driving & Waterless Coolant
Host John Rush and co-hosts Ken Rackley from Tune Tech and Steve Horvath from Jeno's discuss driving pet peeves, winter driving and waterless coolant.

NACE/CARS moving to Detroit
The 2014 event will be held in Detroit, Mich., in July, announced Automotive Service Association Executive Vice President Dan Risley during the kickoff to the I-CAR Inter-Industry Conference in Boston on July 23.

2013 INDUSTRY CALENDAR

OCT. 16-18
ASRW - NACE and CARS
Mandalay Bay, Las Vegas.

NOV. 5-7
AAPEX/SEMA
Las Vegas.

MARCH 3-9
VISION HiTech Training and Expo
Kansas City, Mo.

MARCH 21-23
ASA-Northwest Automotive Training Expo
The NASTF spring meeting also will take place at the same time in SeaTac, Wash.

MARK SMITH President, Wholesale Auto Parts
wap@wirefire.com

VOW, DISAVOW AND VOW RENEWAL

Social media helps connect after parts store fire

I'm using a lot of social media these days. Due to our recent parts store and warehouse fire and rebuilding process, I feel it's very important for us to keep a pulse on our customer base and community. Not to mention the fact we want to remind everyone that we are rebuilding, and coming back better and stronger.

My sudden interest in social media has come with some pleasant, and unpleasant discoveries. Rekindling friendships, making new friends and promoting our business has been nice. Political rants, food porn and everyone sharing pass-it-on posters have been somewhat distasteful. That is unless it's a poster of a cat or kitten doing something stupid, or if the poster has an unusually poignant message. It's a fact I've come to terms with, but may fully never understand.

During one of my social media updates, I received a message from an old high school friend. It seems he and his wife of 28 years were having a vow renewal, and they invited my wife and I to attend. Why 28 years? Why not wait until 30 years? Twenty-eight seems like an odd number.

Well, I've never been to one of these, and was somewhat confounded why anyone in their right mind would do "that" over again. What was the need? A vow is something that is a solemn promise, right? Did a vow somehow get broken? That had to be it. Somebody did something to somebody else that was not mentioned within the constraints of the original vows, and the overpowering guilt of such a thing has promoted the belief that if they just said the vows again, possibly with more feeling and tears this time, absolution would result. And they'd live happily ever after.

I didn't prod my buddy too much about the rationale for fear of being possibly culpable, but suggested that this time they both change the vows a little to reflect the state that 28 years of marriage bequeaths. I wrote his vows, and my wife wrote his wife's vows. His vows were: "I promise to love, honor and cherish you. Furthermore, I will not get mad when you go shopping, and will occasionally accompany you without whining. I will lift the seat, and close on completion. I will not complain (much) when you feed me low-fat, fat-free, new age food as if I'm a 16-year-old girl trying to fit into a prom dress two sizes too small. I will not forget your birthday, our anniversary, or something you asked me to pick up from the store on my way home. In sickness and in health, till death do us part, unless a really good football game is on. After all, I'm a man."

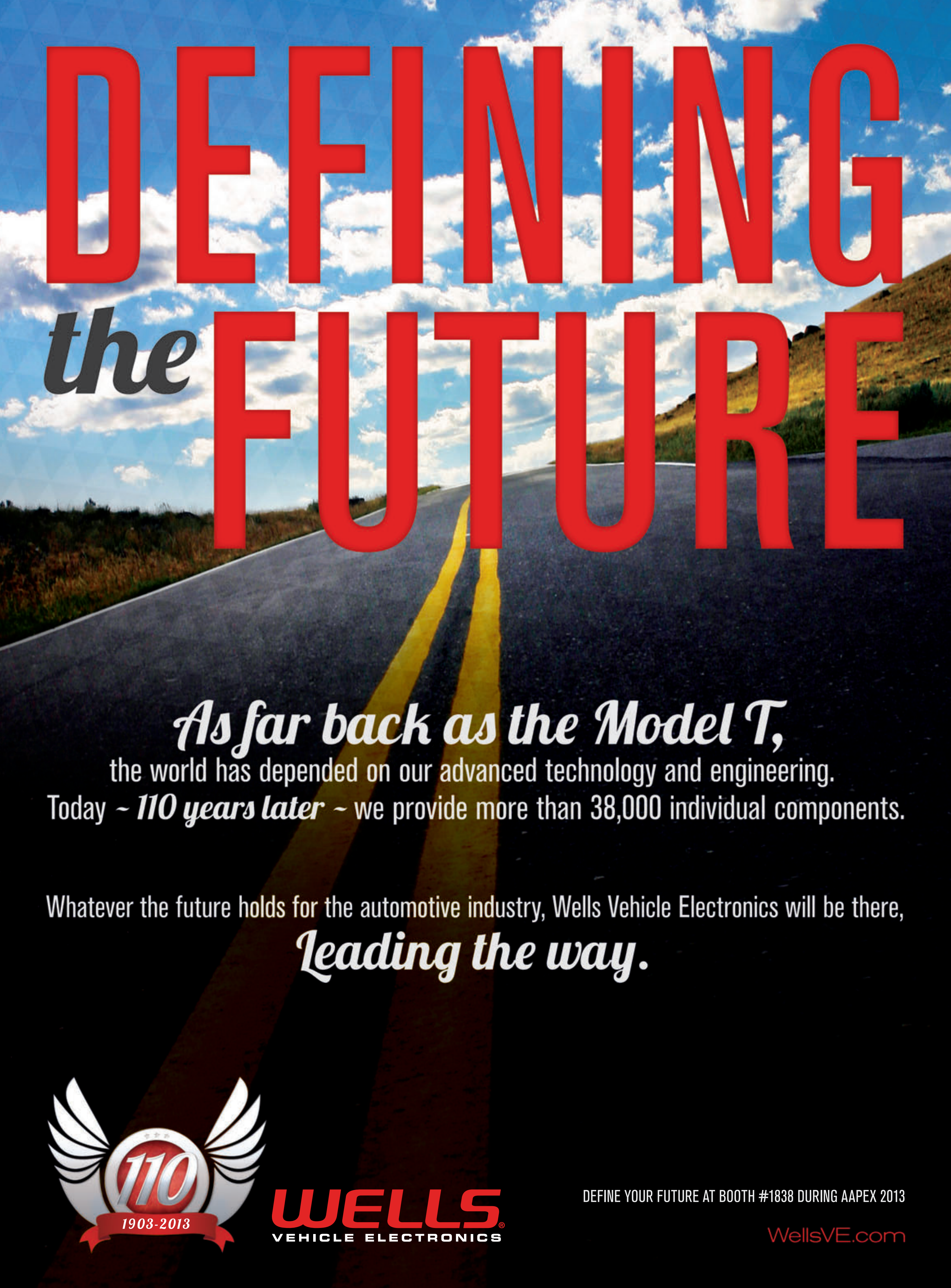
Now for her vows: "I promise to love, honor and obey my mother. I will not buy something really expensive every time you go play golf, yet reserve the right to do so in extreme situations. In sickness and in health, till death do us part, unless a really good football game interferes with a 'Murder She Wrote' marathon."

> **"The vow renewal is an opportunity to look at the past while looking forward to the future."**

While thinking what an awesome vow renewal service that would be, my mind wandered to our situation with our business. Our business had been very good to us, but somehow our stewardship had faltered, and the fire resulted for whatever reason.

Since I'm too young to retire, still have debt and love what I do, maybe I should consider making a few vow changes of my own. The old vows were fine, mind you, but a fresh new set seems to be in order. Much like my friend's vow renewal, it's an opportunity to look at the past while looking toward the future. Renewing my commitment to my business, customers and employees, while not as humbling as what my buddy went through, does indeed provide a measure of absolution for our past business transgressions, or poor decisions.

So our grand re-opening ceremony is just a few weeks away, we plan to celebrate our new identity, with renewed passion, pomp and circumstance – then, once more into the fray. □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DAN PIKE VP, Programs & Member Services, AASA

dpike@aasa.mema.org

WILL GOOD TIMES ROLL INTO 2014?

Global markets are up through third quarter 2013

Laissez Les Bon Temps Roulez! "Let the good times roll!" The Cajun French cheer heard in New Orleans during Mardi Gras, also might be heard in the global automotive aftermarket when describing business in 2013 – but will the good times roll into 2014?

The most recent quarterly "How's Business" global aftermarket business survey by the AASA Overseas Automotive Council (OAC) polled its regional directors and board of governors about their experiences in Q3 2013. It compared businesses with 2012 and measured member expectations for 2014.

Survey responses generally indicated that business was up through the third quarter of 2013. "Business in our U.S. and international regions in the first seven months of 2013 has been excellent," was a typical response from the OAC board of international aftermarket business executives.

Latin America was cited as a growth market, "right on track with projections," according to one respondent. While noting that Venezuelan business has declined, another survey participant added, "Other (Latin American) regions have picked up … Business in Mexico is going strong!" Another stated, "Business is steady in Mexico, the Middle East and South America."

Although 2013 isn't over, it has been better for business compared to 2012, according to OAC's survey. "We are ahead of last year's sales at this point. Some has come from price increases and some from pure business gains," one member said. Another stated, "We've seen significant increases in sales in all our U.S. and international regions."

But year-end 2013 projections are less rosy. One response to the OAC survey said, "We are starting to see some slowing and expect sales for the remainder of year to be only marginally higher." Another noted simply, "We expect slowdown in Q4 2013."

The 2014 outlook is less sure, but projections by OAC survey respondents show cautious optimism. Markets in Colombia and Australia were mentioned by survey participants as ones to watch in this regard.

Colombian markets fared poorly in 2013, as an OAC survey participant explained, "(Colombia's) negative balance in auto parts is due mainly to a fall in domestic demand carrying over from 2012. The sector's performance has been deteriorating since May." However, the Colombian government is reactivating its economy through the free trade programs with the U.S. and the European Union, and is contemplating additional programs with other countries continuing through the next two years.

Australian markets are struggling with the country's unique economic issues. Although the country has low national debt and low unemployment, its manufacturing is losing ground due to high, uncompetitive costs. An OAC survey respondent noted, "This is forcing the government to restructure, with greater emphasis on service industries and tourism." Australia also is coping with the rapid decline of its dollar, which increased the cost of imported parts approximately 18 percent.

> **"The 2014 outlook is less sure, but projections by OAC survey respondents show cautious optimism."**

The country's aftermarket experienced unprecedented consolidation in 2013. Four companies now control about 44 percent of auto parts jobbers in Australia: Genuine Parts Co. U.S.A., 100 percent owner of Exego; Metcash, owner of Automotive Brands and Australian Truck & Auto Parts; Quadrant, owner of Bursons; and AHG with its Covparts distribution. "This consolidation is accelerating the trend towards a two-step distribution structure, particularly for imported parts. This, in turn, is leading to the introduction of 'House Brands,'" an OAC survey participant noted.

What does all of this mean for the global automotive aftermarket? These comments by an OAC international member sum it up best: "There is reason for confidence that, just as in the past, the automotive aftermarket will adapt to new economic environments and continue to make its contribution to the (global) economy."

For more info about the OAC and its programs, visit www.oac-intl.org. □

BOB MOORE President, Bob Moore & Partners

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BUCK ROGERS OR REALITY?

Shops may be printing parts in the near future

Fast forward to a time in the not too distant future. A tech is ordering a part using voice-activated software on his smart wristwatch. The voice of the software asks, "Do you want the part delivered, or would you prefer to print it?" He replies, "Print it." In about 20 minutes, the EGR filter he ordered is ready. He takes the filter off the printer and installs it on the vehicle.

I realize that almost everyone reading the preceding paragraph is at least skeptical and more than likely in total disbelief of the Buck Rogers concept of "printing" a part. But I was recently exposed to some technology that leads me to believe that my claim of "a time in the not too distant future" as it relates to "printing parts" is no wild fantasy.

The occasion was a tour of the new "SEMA Garage," a state-of-the-art technology center that recently opened. I shared the story last month of witnessing a prototype of a sport crossover that was being scanned and mapped into an incredibly accurate, digitized, three-dimensional CAD display of a vehicle.

But as impressive as that display was, it paled in comparison with what I was exposed to next. I was shown a state-of-the-art 3D printer. The printer was in the final stage of printing an intake manifold. Yes, printing an intake manifold. The engineers that were designing and testing the manifold had dyno'd a previously printed design. They thought that by tweaking a few port dimensions they could increase performance and reduce fuel consumption.

In my traditional thinking, that meant a trip back to the plant and a couple of weeks work with machinists making a new prototype. In the SEMA Garage, it required only a few keystrokes on the CAD program to change the shape and dimensions of the port and then hit "print."

In a matter of a few hours, the printer produced a composite prototype of the new design for the manifold. The prototype was then bolted on to the engine and a new dynamometer test was run. That's right, the printed prototype made from a plastic composite was bolted on to an engine and run for the duration of the two-hour test. Truly mindboggling. I was told the printer was even capable of diagnosing its own failing parts and printing replacements.

Equally mind-blowing as the technology itself is the accessibility and capability of these gadgets. They start at $15,000 and the one I saw set SEMA back about $35,000. I understand that there are models in use capable of printing in sizes as large as an engine block. There are even printers that can print in metal. If that isn't Buck Rogers, what is?

My opening reference to the concept of printing parts placed it in "the not too distant future." Why am I confident in that assertion? Consider that since 1965, the power of computer processers has doubled every two years while their cost has been reduced by half. Based on this well-established and continuing trend we could see 3D printers in shops before the 2030s. They will cost less than $1,000 and be capable of printing workable parts in less than 30 minutes. Think about how that might impact paths to market and turn the current distribution model on its ear.

> **"In a few hours, the printer produced a composite prototype of the new design for the manifold."**

I remember being at a Global Automotive Aftermarket Symposium in the late 90's or just after the turn of the last century. A top executive of one of the major distribution groups sat on a panel and was asked about how he thought Internet selling might impact his business. He thought for a moment and said with a smirk, "Given that my customers insist on getting their parts delivered in a half hour, until they figure out how to fax a brake pad to an installer, I'm not worried."

If he saw the same demo I did, I wonder if he would be worried now? □

STEPHEN BARLAS Washington Correspondent
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EPA ADDRESSES SHOP TOWELS

Reclassifies shop towels as non-hazardous

The Environmental Protection Agency (EPA) says auto repair shops are one of the chief beneficiaries of a final rule having to do with disposal of shop towels.

Those towels are used to mop up grease and solvents, and can be either disposable or reused, in the latter case sent to laundries. More than 25 years ago, if you can believe this, Kimberly-Clark, which manufactures disposable wipes, petitioned the EPA to change the classification of disposable wipes from "hazardous" to "non-hazardous." That would make them cheaper and easier to use for repair and body shops.

The EPA issued a proposed rule to that effect, with caveats, in 2003. Then...nothing. No final rule was ever issued until this July, when after 28 years, a final rule suddenly appeared, seemingly out of nowhere. The EPA has classified the final rule as "significant." It is effective on January 31, 2014.

The final rule ostensibly reduces the costs of using disposable wipes, which are reclassified as "non-hazardous." This applies to wipes contaminated by what are called F0001-F0004 solvents, a designation that includes most solvents used in the auto aftermarket except trichloroethylene, which will continue to be treated as hazardous waste.

As a result, auto repair and body shops will no longer have to "manifest" most disposable wipes when they are sent off-site, and they can be sent to non-hazardous waste handling facilities. But the used disposable wipes have to be managed, while on site, in closed containers that are labeled "Excluded Solvent-Contaminated Wipes." The wipes can only be stored on site up to 180 days. Solvent-contaminated wipes must not contain free liquids at the point of being sent for cleaning or disposal.

This is a harder to meet standard than the one the EPA proposed in 2003, which would have required auto repair facilities to "ring dry" the wipe before getting rid of it. To achieve the new "no free liquids" standard, facilities will have to use what is called the Paint Filter Liquids Test (Method 9095B).

This test involves using a number 60 +/- 5% paint filter available at any paint store. If any portion of the wipe's contents passes through and drops from the filter within the 5-minute test period, the material is deemed to contain free liquids. Free liquid solvent removed from the wipes must then be managed as hazardous waste, as appropriate, and may be recycled to further reduce a facility's environmental footprint.

The Paint Filter Liquids Test is already used by many state environmental agencies leading the EPA to say specification of that test is no big deal.

And don't think you have to test every rag. The EPA doesn't say this in bold face in any of the materials on its website dedicated to this final rule, but an auto shop is not expected to perform this test on every single disposable wipe. If one reads every word of the final rule, one would find these two sentences: "EPA notes that generators do not have to conduct the Paint Filter Liquids Test for every solvent-contaminated wipe. Rather, generators must ensure that if the Paint Filter Liquids Test was performed, the wipe would pass."

EPA estimates that the final rule will result in a net savings of between $21.7 million and $27.8 million per year. That is for all affected industries, not just the automobile repair and aftermarket services sector.

"I've heard directly from stakeholders about the benefits of this rule and the need to finalize it," says Mathy Stanislaus, assistant administrator for EPA's Office of Solid Waste and Emergency Response. "The rule reduces costs for thousands of businesses, many of which are small businesses, while maintaining protection of human health and the environment." □

"The final rule ostensibly reduces the costs of using disposable wipes, which are reclassified as non-hazardous."


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FROST & SULLIVAN: New powertrain components to drive reman demand among medium, heavy-duty vehicles

BY **ANUJ MONGA** | FROST & SULLIVAN ANALYST

Demand for medium- and heavy-duty remanufactured engine components will receive a turbo-boost in the North American aftermarket thanks to the impact of EPA 2004/2010 emissions regulations, yet it will be increasingly difficult for some suppliers to keep up with the pace of change.

Frost & Sullivan expects the market revenues to reach $3.56 billion over the next five to seven years. Of all components, engine assemblies show the highest growth potential.

Medium- and heavy-duty engines have been enhanced by the addition of many electro-mechanical parts and variable geometry turbochargers (VGTs) included in the exhaust as recirculation systems (EGR) that will start entering the aftermarket in the next three to four years. Although EGRs, used for emission control in diesel engines, have been around for a while, tightening EPA norms on nitrogen oxide (NOx) reductions have led engine manufacturers to incorporate more sophisticated and advanced EGR system components into their powertrain systems. This provides an opening for remanufacturers to grow.

Nonetheless, the global economic downturn of 2007-2009 impacted not only new truck sales, but also altered the maintenance cycles of many truck fleets; changing their expense patterns, and consequently constricting many of the cash outflows, which is indicative of lower maintenance spends and prolonged service life.

At the same time, the improved quality and reliability of powertrain components has meant a longer increased service life, and thereby, restrained the demand for some replacement components, such as transmissions. There is also increased competition to remanufacturers from suppliers of new, non-OE parts that are being imported into North America from low-cost manufacturing locations elsewhere.

These products represent a threat to remanufacturers because they are competitively priced and seek to provide the same value proposition as remanufactured components. At the same time, many small remanufacturers lack the technological ability to supply many of the new engines currently entering the aftermarket.

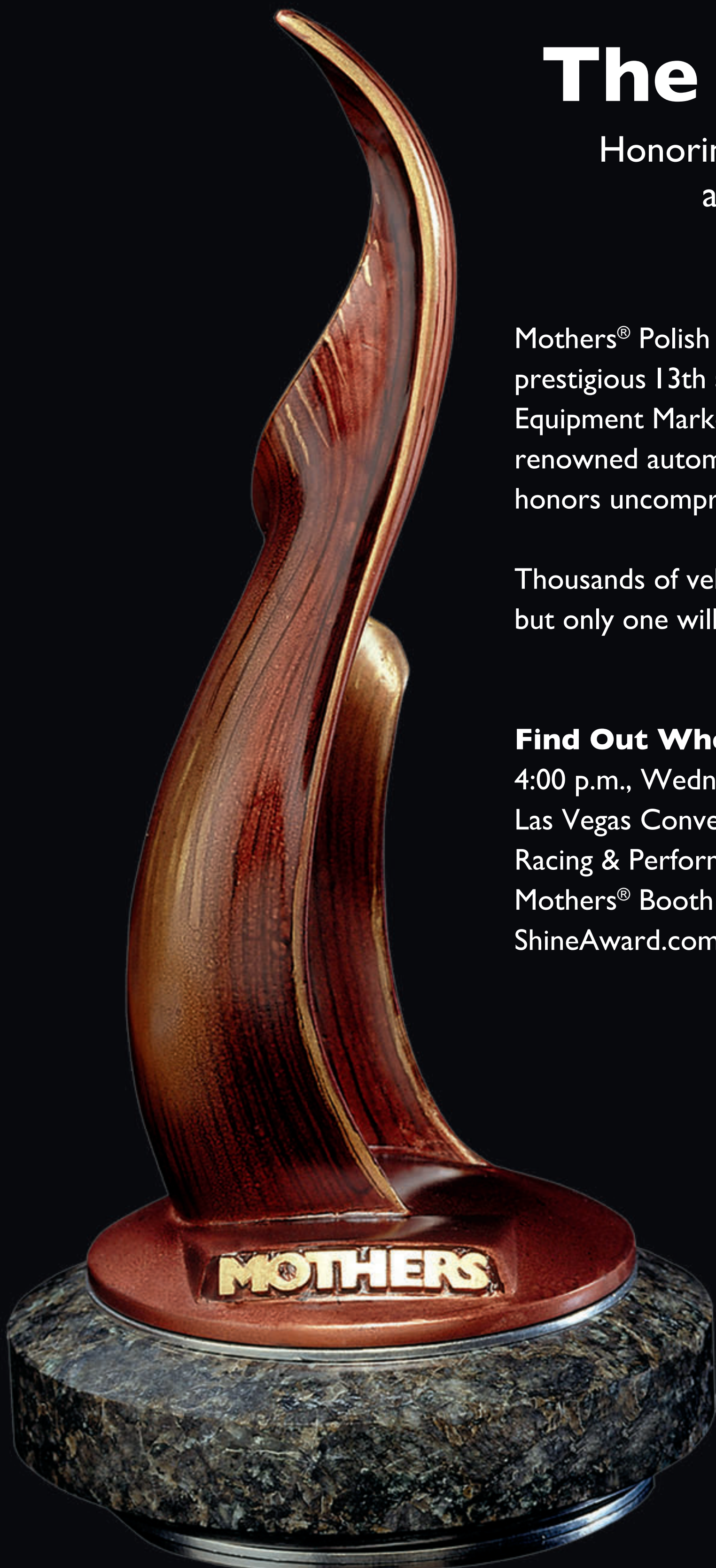
> **The medium, heavy duty reman engine market is expected to top $3.56 billion over the next 5-7 yrs.**

The lack of cores is also emerging as a potential challenge because of the relatively new, but growing installed base of advanced engines in the medium- and heavy-duty aftermarket. Here, OEMs and their dealers in the OES channel have the upper hand. There are few established core management channels in the independent aftermarket for new heavy-duty engines, and over the last decade the North American remanufacturing industry has seen a considerable amount of consolidation as the large OEM suppliers push smaller participants out of business.

While, unit shipment demand for some remanufactured powertrain components will decline slightly over the next five to seven years due to an improved average service life, product availability, reliability and optimal pricing will remain key factors in attracting and retaining customers.

Companies with diverse product portfolios are most likely to capitalize on the new opportunities available in remanufacturing new engines, turbochargers and related electro-mechanical components. Prices will rise to support the higher-value content, but quality and reliability will be most important for remanufacturers taking on these new challenges. □

Anuj Monga is a Senior Research Analyst for Frost & Sullivan's Automotive & Transportation research practice. He focuses on monitoring and analyzing emerging trends, technologies and market behavior in the automotive aftermarket in the United States and Canada. For more more information about this article or about Frost & Sullivan Automotive and Transportation research, contact Jeannette Garcia, corporate communications- North America, at Jeannette.Garcia@frost.com or 210.477.8427.


MOTHERS

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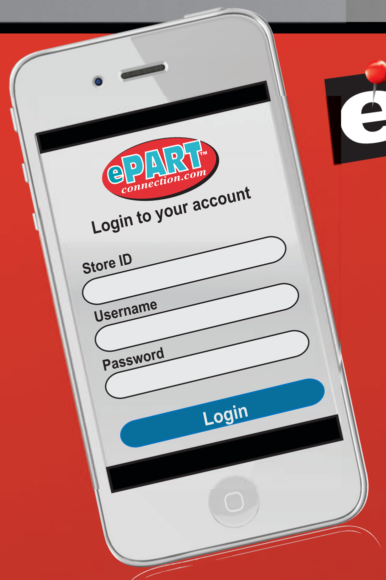

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COVER STORY

THE PLACE TO BE

Photo: Courtesy of AAPEX

AAPEX DRIVING INNOVATIONS FOR AFTERMARKET INDUSTRY WEEK

BY **JAMES E. GUYETTE** | NEWS CORRESPONDENT

BEING in Las Vegas is a sure bet for the 100,000-plus professionals expected to be on hand for Automotive Aftermarket Industry Week. Anchored by the Nov. 5-7 Automotive Aftermarket Products Expo (AAPEX) and the Nov. 5-8 Specialty Equipment Market Association (SEMA) Show, numerous other aftermarket organizations are conducting membership gatherings and conferences concurrent with the main conventions along the Strip.

"AAPEX is making a promise this year that if you attend, you will grow your business," says Arlene Davis, senior director of meetings and events at the Automotive Aftermarket Industry Association (AAIA). "We firmly believe that if folks take full advantage of what is available at AAPEX they can have a positive impact on their business."

Jointly sponsored by AAIA and the Automotive Aftermarket Suppliers Association (AASA), Davis encourages attendees to put some advance thought into what they hope to accomplish. "You have to plan to be there – you can't just show up," she suggests, citing a vast array of networking opportunities, educational sessions and product displays.

AAPEX is hosting 2,324 exhibitors manning 5,054 booths and 32 International Pavilions.

Among attendees, last year attracted 39,591 industry decision-makers representing 140 nations; a larger attendance figure is expected for the 2013 edition of the event, according to Davis, who says each potential buyer spends an average of nine hours traversing the show floor.

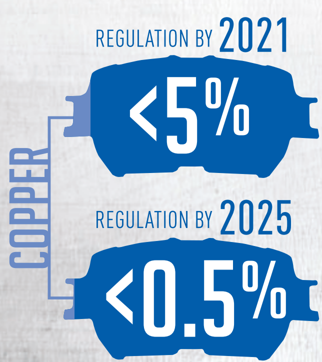
New this year at www.aapexshow.com is an attendee-friendly brand-identifica-

LOW-COPPER LEGISLATION IS CHANGING YOUR BRAKE BUSINESS... *TODAY.*

Copper has long been a key ingredient of ceramic friction materials. However, trace amounts of this material can enter rivers, streams and other marine environments, where it is toxic to aquatic organisms.

Beginning January 1, 2014 in California and January 2015 in Washington State, copper and other hazardous substances must be phased out of OEM and replacement brake pads and shoes. By 2021, copper must be reduced to 5% or less of total material content by weight, and to just 0.5% or less by 2025.

CALIFORNIA LAW TAKES EFFECT JANUARY 1



tion system to aid in locating particular products, especially since the industry's ongoing pattern of mergers and acquisitions can create confusion when trying to find the specific vendor of a particular brand, she says.

Aftermarket Business World is publishing a comprehensive *AAPEX Product Extra* being mailed to all registered domestic and international buyers two weeks prior to the show and handed out onsite to attendees. Electronic versions will be distributed online.

Thousands of products of interest to both the do-it-yourself and do-it-for-me segments will be displayed throughout the Sands Expo Center, covering a host of categories that include Accessories; Automotive Lighting; Business Tools; Chemicals; Lubricants and Filters; Electrical; General Merchandise; Hard Parts; Innovation; Mobile Electronics; Paint, Body and Equipment; Safety; Tires and Wheels; Tool and Equipment; Radiator/Cooling; and Remanufacturing.

"Year after year we see greater interest from companies to exhibit and attendees to visit the enhanced AAPEX Remanufacturing section," says AAIA Senior Vice President Rich White. A sold-out count of 39 exhibitors is taking part. "The increased number of booths related to remanufactured products is a reflection of the continued growth in the average age of vehicles, currently at the historic level of 11.3 years for both cars and light trucks, accounting for more than one-half of all light vehicles on the road," he explains.

"It is exciting to see remanufacturers and their suppliers – along with the environmental, economic and product performance benefits of remanufactured products – being recognized in one area on the main show floor at AAPEX," notes John Chalifoux, president and COO of the Motor & Equipment Remanufacturers Association (MERA), which is co-hosting the section along with the Engine Rebuilders Council (ERC)

Known as NARSA, the International Heat Transfer Association's AAPEX pavilion is featuring 60 exhibitors from seven nations with 14,000 square feet of products and services for car and truck heating, cooling, and air conditioning service and replacement.

Getting business done

A testimonial regarding the value readily obtained by attending AAPEX is provided by Rusty Bishop, CEO of Federated Auto Parts: "AAPEX is an ideal time to renew and review relationships with current vendors, network with industry colleagues and seek out new products and services," he points out.

"At Federated, we try to spend three full days on the show floor, dedicating a day-and-a-half to pre-scheduled meetings and using the remainder of the time to identify new products and take advantage of educational offerings." The real advantage of attending AAPEX, according to Bishop, "is the ability to meet with so many business associates all in one place in a relatively short period of time. It's a place where business gets done."

Bob Cushing, president and CEO of WORLDPAC, Inc., will be the featured speaker at the Nov. 5 AASA Executive Breakfast meeting. Calling it the "don't miss event" at AAPEX, AASA President and COO Bill Long reports that "WORLDPAC has demonstrated the ability to grow by using product data to successfully bridge the gap between supplier and service provider, and Cushing will comment on WORLDPAC's efforts to create one of the highest regarded catalog programs in the industry."

Cushing's presentation will also address the Internet's impact on the aftermarket, including the issues of price transparency and how suppliers can protect their brands.

AAPEX's Learning Forum at the Venetian Hotel has been expanded to include 36 free educational sessions. "There are more of them than there's ever been before, and all of them were chosen because the topics are relevant," says AAIA Chief Information Officer Scott Luckett.

The wide range of classes begin Nov. 4, the day before the official start of AAPEX, and Luckett urges you to make your travel plans accordingly.

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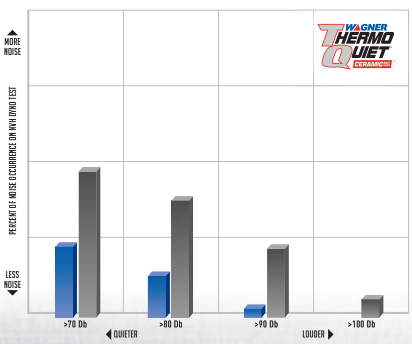

Chevy Silverado

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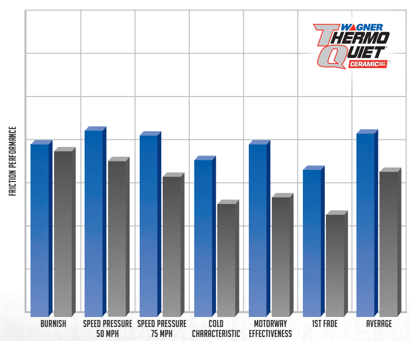

Honda Accord/Civic

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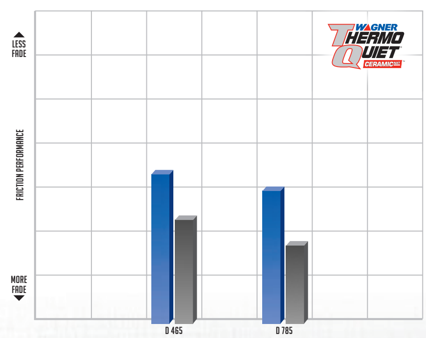

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Luckett's Nov. 7 seminar, entitled "Aftermarket Telematics: Separating Fact from Fiction," includes Roger Lanctot of Strategy Analytics speaking about "current market conditions, projected scenarios and probable aftermarket solutions to the threat of embedded telematics." Luckett will discuss the aftermarket's telematics strategy and describe industry efforts "to secure the consumers' right to choose where data from their vehicle goes." In addition, the winner of the 2nd Annual Aftermarket Telematics Challenge will present the product being recognized as the best example of connectivity in the aftermarket.

The Nov. 4-5 AVI Training Conference will take place alongside AAPEX at the Sands Expo Center. More than 20 high-end technical and management classes are being conducted to aid technicians, service advisors and shop owners in being more efficient. Technical topics include advanced driveability, diagnostic approaches, Bosch technologies, emissions controls and schematics. Management classes will be geared toward shop owners, focusing on marketing, customer service, selling and shop efficiency.

Partnering with the University of the Aftermarket, the Automotive Warehouse Distributors Association (AWDA) is offering an expanded series of seminars during its Nov. 2 AWDA Business and Education Conference at the Venetian.

"Multiple distributor-focused sessions will honor AWDA's commitment to education, but still remain sensitive to the realities of traveling during Industry Week," says Executive Director Larry Northup.

Registration is free for all AWDA conference attendees, and you will receive continuing education units (CEUs) toward your Automotive Aftermarket Professional (AAP) or Master Automotive Aftermarket Professional (MAAP) certificates from the University of the Aftermarket.

SEMA reaches niches

Bright chrome, flashy paint and other industry eye-candy can be experienced at the SEMA Show at the Las Vegas Convention Center. Eleven miles of aisles showcase products for several niche markets, including Light Truck, Street Rod, Wheel/Tire, Restoration, On-board Technology, Street Performance, Off-road, Restyling, Racing, Mobile Electronics, Import/Sport Compact Performance, Powersports and Paint & Body Equipment. Your AAPEX badge gets you into SEMA, and your SEMA badge gets you into AAPEX.

Among the new attractions this year is Cars & Coffee – SEMA Edition. Taking place on the Las Vegas Hotel's (formerly the Hilton) patio from 8 a.m. to 9 a.m. each morning of the event, attendees have a chance to "grab a cup of coffee and a donut, check out some cool vehicles, mingle with colleagues and then get a jump-start on your day" by visiting an enlarged Featured Exhibitors section at the hotel, says SEMA's Della Domingo.

Overall SEMA Show attendance last year was 135,000 – up 2 percent from 2011 – including 60,000 buyers; 25 percent of the buyers were from outside of the U.S. More than 15,000 international buyers are expected at the 2013 edition.

"We're optimistic about this year's event, as exhibitor participation is strong. We're up about 12 percent in terms of number of companies year-to-date, and are on track to see more than 2,400 companies exhibiting," Domingo reports, adding that these figures are the highest in the show's 47-year history.

As a result, organizers are "shifting away from a sales strategy and focusing instead on helping exhibitors and buyers connect with one another during the event," according to SEMA Vice President Peter MacGillivray.

"The trend over the last few years has been one of increased industry optimism," he says. "With a higher number of exhibitors at the upcoming show, we're working closer than ever with all showgoers so that they have a successful event."

MacGillivray says "as global demand for the industry's products soars, there is huge opportunity for our members. We have a comprehensive international relations program to help U.S. manufacturers connect with buyers in the most relevant markets."

Educational upgrades

Enhanced features for the Collision Repair & Refinish market include a larger show floor area, targeted activities both inside and outside of the convention center and upgraded educational offerings.

Last year's show had 330 exhibitors in the Collision Repair & Refinish area and the Tools & Equipment area, the two sections where many firms display products directed at the body shop segment.

"The expanded floor section makes it really easy and convenient for buyers to see all the products in the collision market within a defined area," MacGillivray says.

Those in the collision market are also able to network and expand their knowledge during several industry meetings and classes taking place. The Collision Industry Conference (CIC), the National Auto Body Council (NABC) and the Society of Collision Repair Specialists (SCRS) are among the groups hosting conferences during the show.

SCRS is also presenting a comprehensive Repairer Driver Education program.

"From the impressive growth of exhibitors, to attendees who are reaching out to SCRS already looking to register and ask questions about our education, it is clear the collision industry is really excited about this year's show," says Aaron Schulenburg, SCRS' executive director. The seminars are set to deliver "fresh and inspiring content, while continuing to remain relevant to collision repairers," he adds.

"Each year we have taken feedback from past attendees and used it to amplify our upcoming offerings. This year, we are adding to the format with designated tracks that can guide repair industry professionals through the week-long program based on their core interests in what they need for their business."

Some want to better understand how to manage their businesses, and what makes them tick, while others seek ways to enhance and grow through new opportunities or untapped customer bases. "Others may be looking for ways to best position their business to make it more attractive when they wish to sell it, or learn how to compete in a consolidating marketplace," says Schulenburg. "Regardless of interest, there is something for everyone and the objective remains the same: To address real issues faced by collision repairers, while providing tangible information they can apply to their business when they return home." □

DIESEL GAINING GLOBAL GROUND

DIESEL SET TO SURPASS GASOLINE-FUELED VEHICLES

BY **JAMES E. GUYETTE** | NEWS CORRESPONDENT

Diesel's future as a global motor fuel is far from sputtering. Petroleum consumption forecasters are predicting that diesel-powered cars and trucks will be the dominant fuel system of choice for years to come.

Not only will diesel surpass gasoline as the top worldwide transportation fuel by 2020, diesel will also account for 70 percent of the growth in demand for all transportation fuels through 2040, according to a new study from ExxonMobil.

TRENDS & MARKET ANALYSIS

"The relative shift away from motor gasoline to diesel is driven by better light duty vehicle fuel economy and the growth in commercial transportation activity," says the international energy provider's 51-page analysis, entitled *The Outlook For Energy: A View To 2040*.

"Economic growth and the resulting increased movement of goods and people drive demand for diesel fuel," the report continues, citing heightened population levels and improving economies. "About 80 percent of the growth in commercial transport demand will come from developing nations."

Currently diesel powers some 60 percent of the vehicles in Europe, where the fuel is less expensive than highly taxed gasoline. In the U.S., diesel typically costs between 25 cents and 40 cents per gallon more than gasoline, but the difference has been trending downward the past couple of years, according to Allen Schaeffer, executive director of the Diesel Technology Forum. When factoring in diesel's relatively higher fuel efficiency, he says the cost differential is less significant.

"Even with high fuel prices, we're seeing more consumers willing to invest in more advanced technology, fuel-efficient vehicles," Schaeffer says.

And while North America's thirst for gasoline is expected to decline by one-third through 2040, the ExxonMobil report anticipates that diesel's domestic demand will rise by more than 65 percent.

"Fuel efficiency has always been a major attraction of clean diesel vehicles," says Schaeffer. "Because diesels are 20 percent to 40 percent more fuel-efficient than gas cars, drivers save money with diesels even when diesel fuel prices are slightly higher than gas prices. The significant savings diesel owners experience compared to gas car owners highlights another major reason why clean diesel vehicles sales will increase significantly throughout the U.S. in the coming years," he asserts.

INTERNATIONAL NEWSMAKER

Q&A

REX TILLERSON
Chairman and CEO,
ExxonMobil

Q HOW IS DIESEL DIFFERENT FROM GASOLINE?

A While diesel and gasoline are both derived from oil, they work in two different ways and are not interchangeable. Diesel fuel is designed to operate in a diesel engine, where it is injected into compressed, high-temperature air in the combustion chamber and ignites spontaneously. This differs from gasoline, which is ignited in a gasoline engine by the spark plugs.

Q: What is Ultra Low Sulfur Diesel (ULSD)?

A: For model year 2007 (and newer) diesel vehicles, the U.S. Environmental Protection Agency (EPA) mandated the use of ULSD. Very low sulfur fuels reduce particulate emissions and enable the use of advanced aftertreatment devices.

Q: How does a driver know which grade of diesel to use?

A: Most engines are designed to operate on ASTM No. 2-D grade, but some diesel engines in stop-and-go service require No. 1-D diesel fuels for the best results. Check the owner's manual to determine the right fuel for your vehicle and be sure to use ULSD in 2007 model vehicles and newer.

IN THE U.S., DIESEL TYPICALLY COSTS BETWEEN 25 CENTS AND 40 CENTS PER GALLON MORE THAN GASOLINE, BUT THE DIFFERENCE HAS BEEN TRENDING DOWNWARD THE PAST COUPLE OF YEARS, ACCORDING TO ALLEN SCHAEFFER, EXECUTIVE DIRECTOR OF THE DIESEL TECHNOLOGY FORUM.

Q: How is diesel fuel better for the environment?

A: Diesel fuel requires less energy to produce than gasoline. It has higher energy density and thus provides better fuel economy.

Q: Why do diesel engines emit smoke?

A: Diesel engine smoke is caused by incomplete combustion. White smoke is caused by tiny droplets of unburned fuel resulting from engine misfiring at low temperature. This smoke should disappear as the engine warms up. Black smoke could be caused by a faulty injector, insufficient air and overloading and/or over-fueling the engine. Blue-gray smoke is the result of burning lubricating oil and is an indication the engine is in poor mechanical condition.

Q: What factors affect power/fuel economy?

A: Engine design is the most important factor leading to power and fuel economy. However, fuels with a higher density like our Ultra Low Sulfur Diesel No. 2 will provide improved power and fuel economy compared to fuels with Diesel Fuel No. 1 blended into them.

Q: What should be done in the winter to adjust for the cold temperatures?

A: We offer winterized product in a majority of markets that experience severe weather conditions. If temperatures fall well below norms for the local area, or you will be driving much farther north, additional Diesel Fuel No. 1 blending is recommended.

Q: Why shouldn't a driver just use Diesel Fuel No. 1?

A: While Diesel Fuel No. 1 has an advantage in low temperature conditions, there are some disadvantages, as well. The energy content of Diesel Fuel No. 1 is about 95 percent that of Diesel Fuel No. 2 and will provide a correspondingly lower fuel economy. Diesel Fuel No. 1 is also lower in viscosity and provides less lubrication for the fuel pump and fuel distributor.

Q: How long can diesel fuel be stored?

A: If you keep it clean, cool and dry, diesel fuel can be stored six months to one year without significant quality degradation. Storage for longer periods can be accomplished through use of periodic filtrations and addition of fuel stabilizers and biocides.

Q: Other than price, what is the difference between regular, midgrade, and premium gasoline?

A: Gasolines are rated based on octane. In most areas of the country our regular gasoline is 87 octane, midgrade is 89 and premium is 91-93. If you check the owner's manual, you'll find the recommended level for your engine.

Q: Why should I follow my owner's manual and choose mid or high-octane fuel? Isn't gas just gas?

A: To get the best performance out of your vehicle, you should use the octane recommended in your owner's manual. Most vehicles do not benefit from a higher octane level than what is recommended, but using a lower octane than recommended can cause engine knocking or pinging in some cars.

Q: Does gas have an expiration date?

A: In general, gasoline should be used within a month of purchase. When the engine will not be used for an extended period of time, it's best to drain the fuel tank and then run the engine until it stalls. If you choose to store gasoline, keep it in a very nearly full, tightly sealed metal container in a cool environment. Be sure to leave some room in the container to allow for some expansion. Under these conditions, the gasoline can be expected to remain of good quality for at least six months. □

About one out of every two U.S. service stations now offer diesel at the pump, up from one in three a few years ago, according to Schaeffer.

At the upcoming Automotive Aftermarket Products Expo (AAPEX) in Las Vegas, Bosch's Bob Pattengale is conducting a seminar about the latest engine technologies, including diesel, on Wednesday, Nov. 6. On Thursday, Nov. 7, Gary Stamberger from MagnaFlow Exhaust Products is set to discuss clean diesel exhaust systems and how they impact the repair industry.

Bosch executives are predicting that by 2017 there will be more than 60 diesel vehicle models available in North America. The company's diesel fuel injection system, ceramic glow plugs, engine control module, exhaust gas treatment technology and sensors are featured on a new release from General Motors now arriving in dealer showrooms. It's being described as an engineering "game changer."

"The launch of the 2014 Chevrolet Cruze Clean Turbo Diesel solidifies the growing perception and market demand for clean diesel technology here in the U.S.," says Bernd Boisten, a Bosch regional president.

"With this compact sedan, Chevrolet is demonstrating its trust in the many benefits this technology provides, including increased fuel efficiency, superior driving range and maintaining its value longer," Boisten reports. "We are thrilled to see Chevrolet bringing a clean diesel into the U.S. market now and thus further increasing choices for consumers."

Schaeffer concurs. "We're really excited about what the Chevy Cruze brings to this segment," he says. "It's already a successful car in its fuel efficiency and market acceptance. With GM's advanced clean-burning diesel technology under the hood, Cruze stands to be a game changer."

Resolving drawbacks

Built in Lordstown, Ohio, testing by GM has the Cruze demonstrating a range of 717 highway miles on a single tank of diesel, achieving an estimated 46 mpg.

Over a one-year timeframe GM sold more than 500,000 diesel-powered cars across Europe, Asia, Africa and South America, including 33,000 Cruzes, which is GM's best-selling model globally.

The new offering in the U.S. "is expected to establish Chevrolet as the only domestic automaker offering an American-manufactured diesel-powered compact car with a European-American developed engine," says Cruze marketing manager Mike Weidman.

"We recognize this technology's considerable appeal, particularly with young male car buyers, and we are ready to win them over with quality, torque and fuel economy," Weidman says, pointing out that the Cruze has resolved the drawbacks previously associated with older-generation diesel cars, such as excessive engine noise, exhaust soot and offending odors.

"Due to a higher compression ratio and greater energy density of the diesel fuel itself, diesel engines are able to produce more power than equivalent displacement gasoline-powered engines," he notes.

Chris Perry, the automaker's vice president of marketing, said, "We leveraged engineering expertise from around the globe to develop a world-class, low-emissions engine to give U.S. and Canadian customers a car that's both fun to drive and practical at the pump."

Cost of ownership

A recent study sponsored by Bosch and conducted by the University of Michigan's Transportation Institute found that diesel vehicles saved owners $2,000 to $6,000 in total ownership costs over a three-to-five-year period when compared to similar gasoline-powered models.

"Overall, the results of our analyses show that diesel vehicles provide owners with a TCO (total cost of ownership) that is less than that of the gas versions of the same vehicles," according to the report, entitled *Total Cost of Ownership: A Gas Versus Diesel Comparison*. The estimates of savings for three and five years of ownership vary from a low of $67 in three years to a high of $15,619 in five years, but most of the savings are in the $2,000 to $6,000 range, which includes the extra cost associated with a higher ticket price for a diesel vehicle.

"These new findings that clean diesel vehicles are a more cost-effective investment for car owners reinforces what auto analysts and other comparative studies have determined in recent years," says Schaeffer. "As the U.S. moves to the increase fuel standards of 54.5 mpg by 2025, drivers will become more aware of the advantages diesels have over other vehicles in many important areas."

In the three-year comparison, the study reports that a Volkswagen Jetta owner saved $3,128, the Jetta Sportwagen netted $3,389 in savings while a Golf buyer saved an estimated $5,013.

In the luxury segment, diesel versions of the Mercedes-Benz E Class ($4,175), GL Class ($13,514), M Class ($3,063), R Class ($5,951) and the VW Touareg ($7,819) all posted ownership savings during the three-year timeframe.

All of the diesel models had better mpg than the gasoline editions, with the diesels having between 8 percent to 44 percent higher mpg results, according to the study.

They also posted lower fuel costs than all the gas versions of comparable nameplates, with 11 of the 12 vehicles showing double digit reductions in fuel costs, ranging from 10 percent to 29 percent.

The study further reports that 11 of the 12 diesels held their value better than comparable gas models, with eight vehicles showing double digit percentage savings ranging from 17 percent up to 46 percent.

Nine of the 10 diesels held their value better than comparable gas vehicles over fives years, with five vehicles showing double digit percentage savings ranging from 10 percent up to 39 percent. □

‘NEW WAVE’ OF FANS EYE EVS

AFICIONADOS TO EXPAND PARTS MARKETING SPHERE

BY **JAMES E. GUYETTE** | NEWS CORRESPONDENT

Repairers and parts providers are likely to see increased customer inquiries from owners of electric vehicles as EVs pick up steam as a viable vehicle purchase option.

With sales of Nissan’s Leaf EV in the U.S. up by 335 percent since an enhanced 2013 model made its debut in March, the automaker is seeing a significant expansion of EV demand that goes beyond the traditional stronghold in the Western coastal states to “New Wave” markets across the country.

The Leaf “always has sold well on

TRENDS & MARKET ANALYSIS

the West Coast for a number of reasons – state tax incentives that stack on top of federal, high-occupancy vehicle (HOV) and high-occupancy toll (HOT) access, environmental mindedness, a concentration of early adopters and an EV culture and enthusiasm that dates back to some of the earliest EV experiments before Nissan took them mass-market,” explains Erik Gottfried, director of EV sales and marketing. “In fact, for several months Leaf has been the No. 1 seller in the Nissan portfolio in Seattle, Portland and San Francisco.”

The automaker offers an analysis of the Top 15 Leaf markets:

No. 1: San Francisco. The car has made it into the Top 10 best-selling vehicles in San Fran – EV or otherwise.

No. 2: Los Angeles. The performance achieves against gasoline counterparts because of a good charging infrastructure, a dense urban footprint and congestion. “Leaf really whips gasoline-powered vehicles in traffic jams and congestion because unlike them, it uses minimal energy while sitting in traffic,” Gottfried says.

No. 3: Atlanta. This “New Wave” EV market ranks 3rd thanks to several factors, including traffic congestion where the car performs well, state incentives and HOV and HOT access. “Those combined factors result in a real lifestyle change that puts time back in your day and greatly facilitates personal mobility,” says Brendan Jones, Nissan’s director of EV infrastructure strategy.

No. 4: Seattle. Energy companies have been a major proponent in developing the West Coast Electric Highway that has helped to educate consumers and raise awareness for EVs.

No. 5: Portland. Oregon has a Chief EV Officer to promote EV use.

No. 6: Honolulu. With 26 quick chargers, the city has one of the densest charging grids in the U.S. The island environment also makes it easier to strategically place charging points so that EV drivers have easy access to

VENDOR NEWSMAKER

Q&A

WADE KAWASAKI
Executive vice president of Coker Tire

Q HOW DOES IT FEEL TO BE INDUCTED INTO THE SEMA HALL OF FAME?

A It’s still kind of a surreal experience. SEMA means a lot to me; I attended my first SEMA Show when I was 19. Everybody talks about getting that call from Chris (Kersting, SEMA’s president and CEO, who told Kawasaki of his Hall of Fame selection). It was pretty much a heart-stopping moment. I know that there are probably a bunch of folks out there who are more deserving than I, but there’s certainly nobody happier than I.

My interest in the automotive industry started at the age of 10, when I pumped gas at my father’s filling station. Just filling up those cars with gas, washing their windows and checking their oil – I got to look under their hoods. That was cool stuff! Each day, I watched all makes and models of cars drive in and out, and I knew at that time that was where my passion lied. I haven’t wavered since.

Q: What types of specialty tires does Coker carry?

A: We have 17 different brands and styles of bias ply tires, 10 different brands and styles of radial tires and eight different brands and styles of performance tires. Those range from vintage race tires to vintage Ferrari tires.

Q: How would you describe your customer base?

A: The majority of our sales are to street cars. We also have vintage motorcycle and scooter tires. We even have vintage airplane tires and vintage bicycle tires for people who are restoring bicycles.

Q: Is there much demand for agricultural tires for enthusiasts who are restoring old tractors and related equipment?

A: That market is growing rapidly. We have paddle tires for antique farm vehicles that went into the snow. Some agricultural tires are used for the monster truck industry.

Q: What is the extent of your distribution network?

A: We ship container loads of tires to over 40 countries.

Q: How can an aftermarket business owner best assist a customer with specialty tire needs?

A: The shop owners contact us directly. The second floor is filled with tire experts (to provide specific advice). We manufacture tires for some very unusual applications. We also build classic wheels and muscle car steel wheels.

reach key destinations. EVs fit into a larger energy-independence initiative in Hawaii since the state can make its own energy and become less reliant on shipping in fuel.

No. 7: San Diego. Like other top Leaf cities in California and on the West Coast, San Diego benefits from state tax incentives, HOV/HOT access and general environmental mindedness.

No. 8: Sacramento. California's capital has a high level of awareness and education around EVs with a concentration of early adopters and appreciation of EV culture.

No. 9: Nashville. The city is home of Nissan Americas headquarters and the plants that assemble both the Leaf and its battery. Many New Wave EV markets demonstrate a high level of viral sales growth. "Leaf owners have

WITH SALES OF NISSAN'S LEAF EV IN THE U.S. UP BY 335 PERCENT SINCE AN ENHANCED 2013 MODEL MADE ITS DEBUT IN MARCH, THE AUTOMAKER IS SEEING A SIGNIFICANT EXPANSION OF EV DEMAND THAT GOES BEYOND THE TRADITIONAL STRONGHOLD IN THE WESTERN COASTAL STATES TO "NEW WAVE" MARKETS NATIONWIDE.

exceptionally high levels of satisfaction with the vehicle and are eager to share that experience with curious peers," says Gottfried. In Nashville, credit goes to a robust charging infrastructure and a core group of employee enthusiasts who raised awareness of the practicality of the vehicle in the market in 2011. Since then, the "cul de sac phenomenon" has taken off with general consumers where one person buys a Leaf and validates it for the entire neighborhood. "In mid-size cities like Nashville, people know and talk to their neighbors. We don't see that everywhere, but in certain communities we've seen peer-to-peer selling play a huge role and sales really are viral in nature," Gottfried says.

No. 10: St. Louis. The reasons for growth in this New Wave market include enthusiastic dealer engagement that results in increased community education and awareness, corporate and university outreach and Midwestern pragmatism that appreciates the value equation of an EV.

"Expanding beyond the early adopters who love new technology, we're seeing more value-conscious customers motivated by the practicality and frugality of EVs. People see an EV as a freedom from vehicle running costs. Not only is charging cheaper than fueling – EV maintenance costs are much less expensive. Much more frequently Leaf drivers are telling us they trade-out their old monthly gas bill for the entire lease price of a Leaf," according to Gottfried.

No. 11: Tied for this spot are Chicago and Denver. In the Windy City, charging infrastructure growth has been more recent and is being termed "robust." Illinois provides a $4,000 state tax incentive for purchases and reduced registration fees. Gottfried observes that driving habits in Chicago also are heavy with suburban-to-urban commuting patterns. "The enhanced driving range of the 2013 Leaf – partially enabled by the energy-efficient hybrid heater that is an especially important feature for Chicago – has helped make the EV a viable commuter car in this huge car market," he reports.

Helping to popularize the car in greater Denver is Colorado's $6,000 state tax credit, EV enthusiast dealers who sponsor considerable grassroots education and awareness activities, plus a general green-mindedness in the market. "Colorado has a green outdoorsy streak and a vibe that embraces EV culture," says Gottfried. "In an area known for great craft breweries, employees from New Belgium Brewing even drive Leaf to make their sales calls around town. The company offers free public access to its charging stations, which are cleverly concealed in 1970s-era gas pumps."

No. 13: Washington, D.C. "Again, the compact footprint with urban-suburban commutes in easy range, strong Leaf demographics of highly educated buyers in a tech corridor and a quickly growing fast charger network lend to the increasing popularity of Leaf in the nation's capital," he continues. Additionally, for the greater D.C. area, Maryland offers a $1,000 EV tax credit.

No. 14: Dallas-Ft. Worth. DFW has a healthy charging infrastructure in the Lone Star State that is home to NRG's eVgo, which provides car charging services. Adoption of EVs in the market also has been accelerated by peer-to-peer selling at tech and transportation workplaces such as Texas Instruments and the BNSF Railroad. Texas is planning to offer a $2,500 state rebate for EV purchases.

No. 15: New York City. "Its demographics and compact footprint have helped make EVs popular especially in communities surrounding Manhattan. Communities in the market, such as Princeton and Westchester, and areas of Long Island and New Jersey that are conducive to home charging are the most popular," according to Gottfried.

"The New York market also benefits from sales of small EV fleets, including the N.Y. Dept. of Sanitation. High-visibility projects such as the Leaf taxi pilot have helped to raise consumer awareness. Cab drivers report that riders express enthusiastic interest in the EVs, which results in much more conversation and higher tips. Leaf taxi drivers share information cards with QR codes to educate consumers more about the vehicle," he adds. □

GM TO SHIFT RECALL BURDEN TO SUPPLIERS

NHTSA TO REQUIRE ONLINE VIN-BASED RECALL LOOK-UPS

BY **BRIAN ALBRIGHT** | CONTRIBUTING EDITOR

General Motors hopes to shift the cost of parts recalls to its suppliers. This summer, the company adopted new language in its purchasing contracts that would allow it to recoup safety recall costs from the supplier base. The new terms went into effect for all contracts signed after July 15, although at that time no major suppliers had agreed to the new terms.

TRENDS & MARKET ANALYSIS

The GM news came just as the National Highway Traffic Safety Administration (NHTSA) announced new rules requiring automotive OEMs to provide online VIN look-ups to help consumers determine if their vehicles were affected by any outstanding recall notices.

Under the terms of the new contracts, suppliers will be held responsible for parts if GM has to later recall those parts for safety reasons. They will bear financial responsibility for the recall, even if they built the part to GM's specifications. The new contracts state that the supplier's products "will not, at any time (including after expiration or termination of this contract), pose an unreasonable risk to consumer or vehicle safety."

The potential cost to suppliers could be substantial. For example, earlier this year when Chrysler agreed to install trailer hitches on more than 1.5 million vehicles to better protect the fuel tanks, the company estimated the tab would be as much as $151 million.

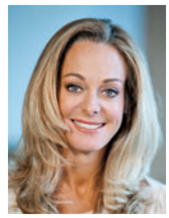
GM has launched a number of initiatives to improve both supplier relationships and quality over the past several years. For example, the company has hired 200 supplier-quality engineers as part of that effort. In a 2012 opinion survey of North American suppliers, GM ranked ninth out of 10 major automakers.

In addition to the new recall terms, suppliers have also been asked to ensure an uninterrupted 30-day supply of parts during any foreseeable or anticipated event (such as labor disruptions or financial difficulties); however, GM will not hold them liable for that level of supply during natural disasters.

The Original Equipment Suppliers Association (OESA) regularly reviews new supplier contracts for its membership, and is currently evaluating the GM terms.

VENDOR NEWSMAKER

Q&A



VICTORIA RUSNAK
President and CEO,
Rusnak Automotive Group

Q WHAT WILL BE YOUR TOP PRIORITIES IN YOUR NEW POSITION WITH THE DEALERSHIP?

A As the leader of a family-owned organization, I intend to continue to build upon the tremendous foundation my father built over the past 50 years. Our growth will come from investment in associate training and use of technology. In addition we will continue to look for acquisitions that build on our core business of selling luxury automobiles with the best customer service in southern California.

Q: What do you think are the top challenges that dealers face right now?

A: The automobile industry has grown into a very complex business. With increased competition and regulation, having a laser focus on every department's expense structure is paramount. Finding ways to improve our customer experience while controlling expenses and becoming more efficient will directly impact our bottom line. I also believe strongly that we are in the people business. Recruiting and training is one of our biggest challenges and opportunities. There are incredible opportunities in the retail automotive business, and I hope to encourage young professionals and college graduates to consider joining our industry.

UNDER THE TERMS OF THE NEW CONTRACTS, SUPPLIERS WILL BE HELD RESPONSIBLE FOR PARTS IF GM HAS TO LATER RECALL THOSE PARTS FOR SAFETY REASONS. THEY WILL BEAR FINANCIAL RESPONSIBILITY FOR THE RECALL, EVEN IF THEY BUILT THE PART TO GM'S SPECIFICATIONS.

Q: How has the importance of fixed-ops/service changed at Rusnak over the past several years?

A: The fixed operations of our business are critical to our profitability. We often refer to them as our annuity, especially as margins in the new car departments continue to shrink. There is no question that technology will assist in streamlining processes in the service drive, specifically in the write up area. We will continue our long-standing practices of training our technicians to the highest certification levels and holding service clinics to educate our customers about vehicle maintenance and improve their ownership experience.

Editor's note: In June, Victoria Rusnak was named president and CEO of the Rusnak Automotive Group. Rusnak was formerly the COO of the company, which operates 14 dealerships in the San Gabriel/San Fernando valley region. The group, founded by Rusnak's father, Paul Rusnak, includes Jaguar, Mercedes-Benz, Volvo, BMW, Audi, and Porsche dealerships. A licensed attorney, Rusnak also made a bid for a California Assembly seat in 2012.

"We do a comparative analysis of all the vehicle manufacturers' terms and conditions," says David Andrea, OESA's senior vice president, industry analysis and economics. "We're not making a judgment call about whose conditions might be better or worse. What we're doing is providing a comparative analysis across all provisions in a typical terms and conditions document, providing one place where a supplier can find out how GM would deal with a provision versus Ford or Chrysler."

Andrea added that the contracts with the most changes typically receive the most attention during this analysis, "and this year, without a doubt, we will focus on GM," Andrea says. "They have the largest number of changes."

The organization planned to specifically discuss the GM terms and conditions at its "Commercial Trends and Legal Strategy" conference on Sept. 17.

The recall issue also ties into an ongoing discussion between suppliers and OEMs about warranty claims. "Our basic tenant here is always going to be that if a supplier is design-responsible, from the standpoint of developing a product to a certain product specification for a customer, then the supplier would be liable for the warranty as it was designed," Andrea says. "But if the material specifications or design is the customer's responsibility, then that customer is liable for the warranty."

NHTSA requires weekly recall data

Right now, only about 70 percent of recalled vehicles are actually taken to a dealership for repairs. Starting next year, NHTSA will require major auto and motorcycle OEMs to provide online access to recall data, so they can search for vehicles by VIN to determine if all recall work has been completed for a given vehicle. The data will be updated weekly, and will be available at the NHTSA website, SaferCar.gov.

"Safety is our highest priority, and an informed consumer is one of our strongest allies in that effort," said U.S. Transportation Secretary Anthony Foxx. "Owners and potential buyers alike will soon be able to identify whether a safety recall for their specific vehicle is incomplete."

The new rules could potentially boost the number of vehicle owners that bring their cars to dealerships for recall work. The new GM supplier contracts, however, will likely have little or no effect on handling recalls at the dealer level, according to a spokesperson for the National Automobile Dealers Association (NADA).

This final NHTSA rule requires large volume car, light truck and motorcycle manufacturers to provide search capability for uncompleted safety recalls on their websites. Manufacturers also must provide vehicle owners with direct recall notices within 60 days of notifying NHTSA about a recall.

Starting next year, NHTSA will require major auto and motorcycle OEMs to provide online access to recall data, so they can search for vehicles by VIN to determine if all recall work has been completed for a given vehicle.

In addition, the rule will require manufacturers to inform NHTSA about exactly what type of propulsion system and crash avoidance technologies vehicles have. That data should help NHTSA identify defect trends related to those systems and components.

OEMs that don't already provide recall data online will have until next summer to launch their own solutions. The same week NHTSA announced the new requirement, GM issued a recall affecting nearly 300,000 Chevy Cruze vehicles because of a brake issue. That recall was the eighth related to the Cruze. □

FORECASTING PARTS SUCCESS

DISTRIBUTOR'S IOT BOOSTS INDEPENDENT JOBBERS' SALES

BY **BRIAN ALBRIGHT** | CONTRIBUTING EDITOR

Accurate forecasting plays a critical role in the success of any aftermarket retailer or distributor. The value of the data that feeds those forecasting systems is growing, and distributors are increasingly competing on the accuracy of their forecast as much as the quality of their goods and services.

TRENDS & MARKET ANALYSIS

Performance Warehouse, a Portland, Ore.-based distributor, has leveraged its inventory optimization tool (IOT) to cut inventory and boost sales, while helping jobbers increase sales by double-digit percentage points in some cases. The company was honored for its achievements this year with the R.L. Polk & Co. Inventory Efficiency Award in the retailer/distributor category.

The company is a member of the Aftermarket Auto Parts Alliance, which won the same category in last year's Polk awards. In fact, the IOT was developed by the Alliance to improve forecasting. The software models sales data, inventory data, vehicles in operation, and replacement rate data to help guide inventory and stocking decisions.

"We were part of the design team on the development of the IOT," says Joe Moore, director of purchasing at Performance Warehouse. "We realized if we could track all of this sales and inventory data cross all 50-plus members of the Alliance, we could do a lot of interesting things down the road."

With the addition of catalog look-up data, the IOT has allowed Performance Warehouse to identify high failure products and get them into inventory faster. Data is evaluated by sales region, and each data input is weighted based on its value in a given area, and by make and model.

"If you take catalog look-ups, VIO by zip code, and sales, and you put intelligence behind that, you can model inventories that best fit the demand from the customers," Moore says. "It gives you a much better picture of what the coverage should be. You can see that in certain categories where before you thought you needed to carry 100 different types, but in reality only 25 of those are selling. Previously, we relied on suppliers for that data, but that didn't include the sales or install data. Now we know what goes off the store shelf and into the installers' hands."

Using that data, the company and its customers can make better decisions. "You can look at the numbers and say, '98 percent coverage is as far as I want to go,'" Moore says. "Because 99 percent coverage results in a certain amount of inventory that is not justified based on sales."

By letting the sales team use the data to work with independent jobbers, the company has been able to decrease inventory by nearly 9 percent, while increasing sales 6 percent (and diversifying parts availability). More impressively, independent jobbers increased

TECHNOLOGY SOLUTIONS NEWSMAKER

Q&A

MARK SENG
Vice President,
R.L. Polk & Co.

Q: WHAT TRENDS DID YOU SEE IN ENTRIES FOR THIS YEAR'S POLK EFFICIENCY AWARD?

A: There are more and more people focused on local demand, and on understanding the key differences in regions and uniqueness of local demand. That guides the decision on where to put inventory, based on their understanding of the local market, right down to the store. That's intuitive on the distributor or retailer side, but it even extends to manufacturers, who are taking into consideration more and more not just the national movement expected for a part, but what is going on at the local level.

Q: What were some of the factors that led to the selection of Mevotech and Performance Warehouse as this year's winners?

A: Mevotech really looked across their entire supply chain for improvement. They really took a holistic approach. One of the things that stood out for Performance Warehouse was that they implemented a tool that went across their entire organization, from the main warehouse to the DCs to the stores, to match inventory to local demand.

PERFORMANCE WAREHOUSE, A PORTLAND, ORE.-BASED DISTRIBUTOR, HAS LEVERAGED ITS INVENTORY OPTIMIZATION TOOL TO CUT INVENTORY AND BOOST SALES, WHILE HELPING SOME JOBBERS INCREASE SALES BY DOUBLE-DIGIT PERCENTAGE POINTS.

their sales a whopping 44 percent in product lines updated using the tool.

"That's an incredible number," Moore says. "Running IOT updates with independent jobbers has made a huge impact. They see parts with dust on them disappear, and the new parts they need are in stock. We provide a spreadsheet that shows what the part is, what it fits, how many we've sold in their region, and the VIO count in his trading area. He has all the data he needs to trust the salesman."

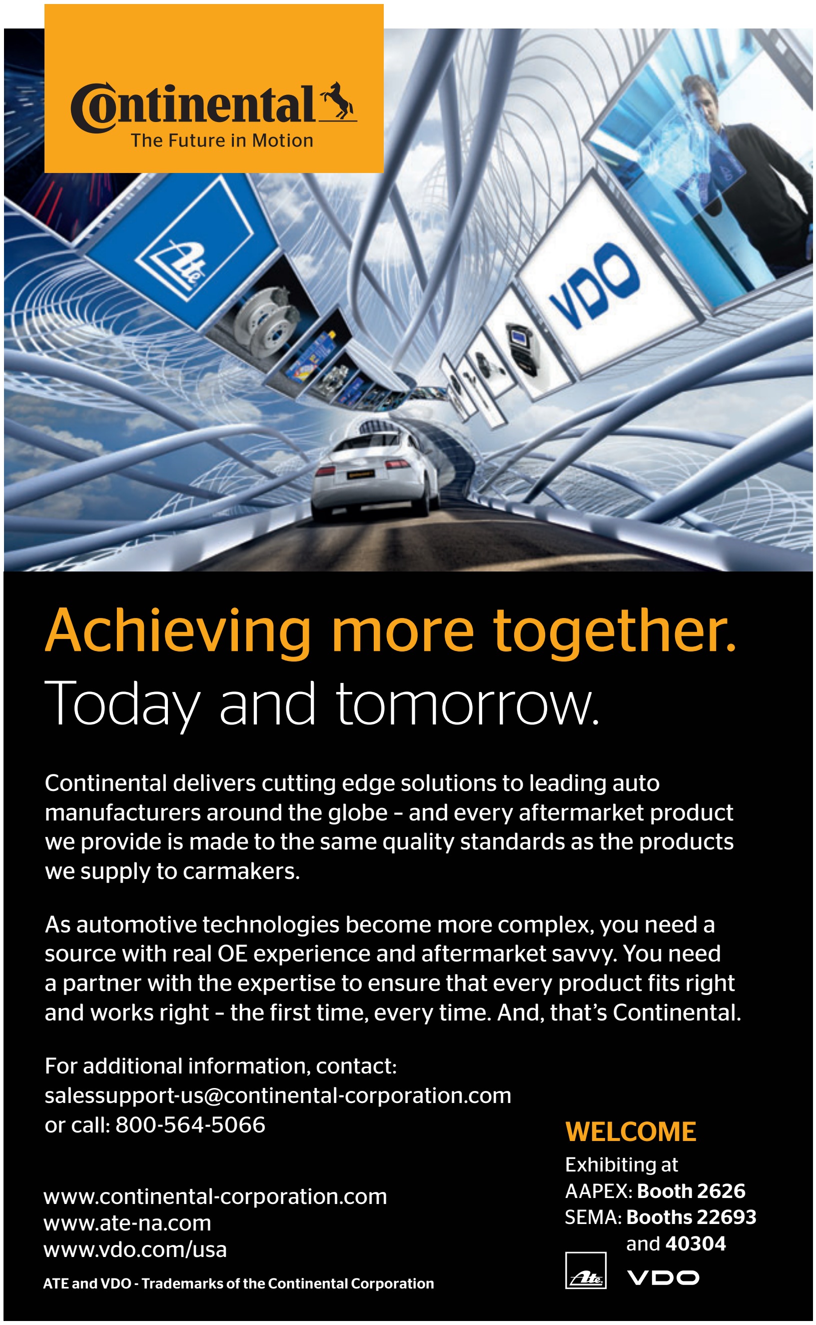
The company also gives suppliers access to its data warehouse. "They can see what's really selling in our supply chain and base their forecasting at the manufacturing level on that," Moore says. "The next step would be for a manufacturer who gets a call for an item to potentially look at our membership and buy those items back, rather than doing another run."

With the addition of catalog look-up data, the IOT has allowed Performance Warehouse to identify high failure products and get them into inventory faster.

Moore says the biggest challenge in using the system has been operational. "Especially the first time you apply this to different inventories, you find inventory that just didn't need to be there," Moore says. "It becomes a challenge in that you have to store it and then negotiate with the vendor to help move the excess."

Getting customers to trust the data is also difficult. Many jobbers are used to having a certain amount of stock on the shelves. "They think they will lose sales if they reduce the inventory, but they haven't sold it, and they're probably not going to sell it," Moore says.

The next improvement the company expects to make will involve related-parts sales. "We're working toward modeling functionality that will let us make sure we have all the other parts you might use on the same job," Moore says. □



TECHNICIAN ATTITUDE STUDY

Photos: Thinkstock

TECHNICIANS CITE BUYING SOURCES, PREFERENCES IN SURVEY

BY **BRUCE ADAMS** | MANAGING EDITOR

TODAY'S technicians are most likely to buy parts from auto parts retailers, jobbers and warehouse distributors, according to the *Aftermarket Business World* Technician Attitude Study. Auto dealerships came in a distant fourth.

Some 26 percent of technicians purchase from auto parts retailers, 21 percent purchase from jobbers, 19 percent purchase from warehouse distributors and 16 percent from dealerships. The least most likely purchase sources were two-step distributors, discount stores and tool truck/tool dealers.

Nearly 30 percent of technicians prefer to purchase parts from auto parts retailers, 25 percent prefer to purchase from jobbers, and 20 percent want to buy from warehouse distributors. Nearly 10 percent prefer to buy direct from manufacturers and 8 percent want to buy from dealerships. Technicians buying from dealers say they most often do so because it is the only place the part was available or for the OEM form, fit and function. But those who choose not to buy from dealers most often said their parts were too expensive or that the aftermarket part was just as good or better than OE.

Methodology: The *Aftermarket Business World* 2013 Technician Attitude Study was fielded to readers of sister publication Motor Age via email. Study results are intended to show general industry trends, not statistical certainties.

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WAGNER BRAKE ANNOUNCES LOW-COPPER CERAMIC FRICTION BREAKTHROUGH

As a result of recent environmental legislation, global vehicle manufacturers are rapidly introducing highly advanced low-copper ceramic friction formulations to their next-generation vehicle platforms. This transition will affect virtually every North American automotive service business, including yours.

And by choosing Wagner® Brake Products, you can be ready today.

The Case Against Copper

Copper has long been a primary friction modifier within ceramic formulations. Due to its environmental impact, however, it must be phased out of OE and replacement brake pads and shoes. This challenge affects service providers in all markets due to leading OEMs' choice to convert to low-copper technology as quickly as possible on vehicles to be sold in North America.

As the No. 1 supplier of global friction to OE manufacturers and the aftermarket, Wagner Brake Products has led the industry in developing proprietary low-copper ceramic formulations that meet the new environmental requirements while delivering across-the-board improvements in NVH control, performance, fade resistance and dusting. In fact, the Wagner Brake brand's new OE21™ low-copper formulations have redefined ceramic friction science, which means new opportunity for your business.

Available immediately in Wagner ThermoQuiet® Ceramic^NXT brake pads, the Wagner OE21 formulations represent an eco-friendly, low-copper solution that establishes a new industry benchmark for brake performance and customer satisfaction. In short, they're the right choice for superior customer loyalty…right now.

Wagner's Best Formulations Ever

It began as a drive to develop more eco-friendly ceramic friction formulations. It resulted in the best brake pads ever produced by Wagner Brake Products.

The goal of Wagner Brake's global R&D team was to develop a full portfolio of application-specific low-copper formulations that would outperform even the best current Wagner ceramic technologies. To meet this challenge, they developed a sophisticated tribological "fingerprinting" process to isolate and analyze the performance of each material within conventional ceramic friction formulations. Once they mapped the dynamic characteristics of copper in a full range of operating conditions, they screened some 1,500 new raw materials to find the ideal low-copper combinations for a full range of OE and replacement applications.

Quieter. Better Performance. Reduced Fade.

The company's proprietary new OE21 formulations feature a complex matrix of materials that replicate the functions of copper while improving overall brake pad performance in each of five key areas: NVH control; stopping power; fade resistance; wear characteristics; and dusting.

Extensive OE-based testing has shown that the OE21 formulations outperform existing Wagner ceramic materials by providing 35 percent quieter braking, 15 percent more stopping power and up to 40 percent better fade performance.

In fact, this low-copper technology has been so successful that a number of OE manufacturers are replacing conventional ceramic formulations with the new low-copper materials in 2015 models to be sold throughout North America.

Available Today!

The new Wagner OE21 formulations are available for more than 95 percent of automotive ceramic applications, so your business can immediately offer the advantages of OE21 low-copper technology to virtually any customer simply by installing Wagner ThermoQuiet Ceramic^NXT brake pads.

Learn more about these exciting new formulations and Wagner ThermoQuiet Ceramic^NXT brake pads by contacting your Wagner Brake Products supplier or visiting www.WagnerBrake.com.

WAGNER® BRAKE PRODUCTS

A Stop Ahead.™

www.WagnerBrake.com

BATTERIES

Purchasing source

Warehouse distributor	35%
Auto parts retailer	31%
Direct from manufacturer	24%
Jobber	43%
Dealership	11%

Preferred purchasing channel

Warehouse distributor	30%
Auto parts retailer	19%
Direct from manufacturer	15%
Jobber	28%

Primary reason for preferred supplier

Good relationship	17%
Parts availability	22%
Price	22%
Fast delivery	19%

Margins

71% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	14%
6-10%*	22%
11-15%*	50%
16-25%*	7%
More than 25%	7%

What techs think they pay

1-5%*	12%
6-10%*	29%
11-15%*	27%
16-25%*	29%
More than 25%	3%

*Percent over jobber

55% of technicians always give recommendations for buying a specific brand of battery.

Amount of batteries that are returned monthly

None	59%	5-9%	6%
1-2%	27%	10% +	NA
3-4%	6%	I don't know	2%

70% do not purchase batteries from a car dealership.

Reasons:

1. Too expensive 78%
2. Aftermarket products as good as (or better than) OEM 46%
3. Convenience/time limits 34%

Frequency of supplier contact

Once a week	22%
Every two weeks	13%
Once a month	19%
Every three months	7%
Every six months	4%
Yearly	4%
No contact necessary	31%

Brand vs. supplier loyalty

If a primary supplier of batteries replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 39%

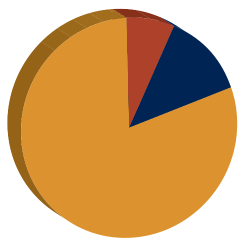
Keep primary supplier and purchase new brand 61%

National brands vs. private label purchases

80% National

13% Private

7% Both



Reason for buying a particular battery

Brand	52%
Warranty	53%
Quality	58%

Customer frequency of taking a battery recommendation

Always	62%
Sometimes	33%
Rarely	2%
Never	3%

Internet ordering frequency

0-10% of the time	94%
76-99% of the time	NA
11-25% of the time	NA
26-50% of the time	2%
100% of the time	2%

Plug In and Turn On

It's not just another battery, it's a DURACELL.
Duracell Automotive Batteries built with AGM Technology meets your customers' need for long-lasting accessory power and starting dependability.

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* compared to a traditional flooded battery

See us at ***APPEX Booth 4022***
and ***SEMA Booth #34296***

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BATTERY CHARGERS

Purchasing source

Warehouse distributor	29%
Auto parts retailer	21%
Tool truck/tool dealer	29%
Jobber	36%
Direct from manufacturer	14%

Preferred purchasing channel

Warehouse distributor	15%
Jobber	31%
Tool truck/tool dealer	23%
Direct from manufacturer	8%

Primary reason for preferred supplier

Price	42%
Carries specific brands	16%
Good relationship	25%
Fast delivery	17%

Margins

93% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	50%
6-10%*	50%
11-15%*	NA
16-25%*	NA
More than 25%	NA

What techs think they pay

1-5%*	27%
6-10%*	27%
11-15%*	27%
16-25%*	9%
More than 25%	9%

*Percent over jobber

43% of technicians always give recommendations for buying a specific brand of battery charger.

Amount of battery chargers that are returned monthly

None	93%	5-9%	NA
1-2%	7%	10% +	NA
3-4%	N/A	I don't know	NA

95% do not purchase **chargers** from a car dealership.

Reasons:

1. Aftermarket products as good as (or better than) OEM 47%
2. Too expensive 41%
3. Limited stock/don't stock 18%

Frequency of supplier contact

Once a week	18%
Every two weeks	NA
Once a month	NA
Every three months	NA
Every six months	9%
Yearly	18%
No contact necessary	55%

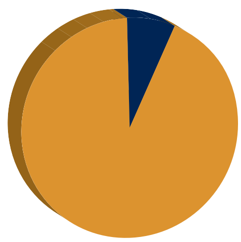
Brand vs. supplier loyalty

If a primary supplier of battery chargers replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 55%

Keep primary supplier and purchase new brand 45%

National brands vs. private label purchases



93% National

7% Private

NA Both

Reason for buying a particular charger

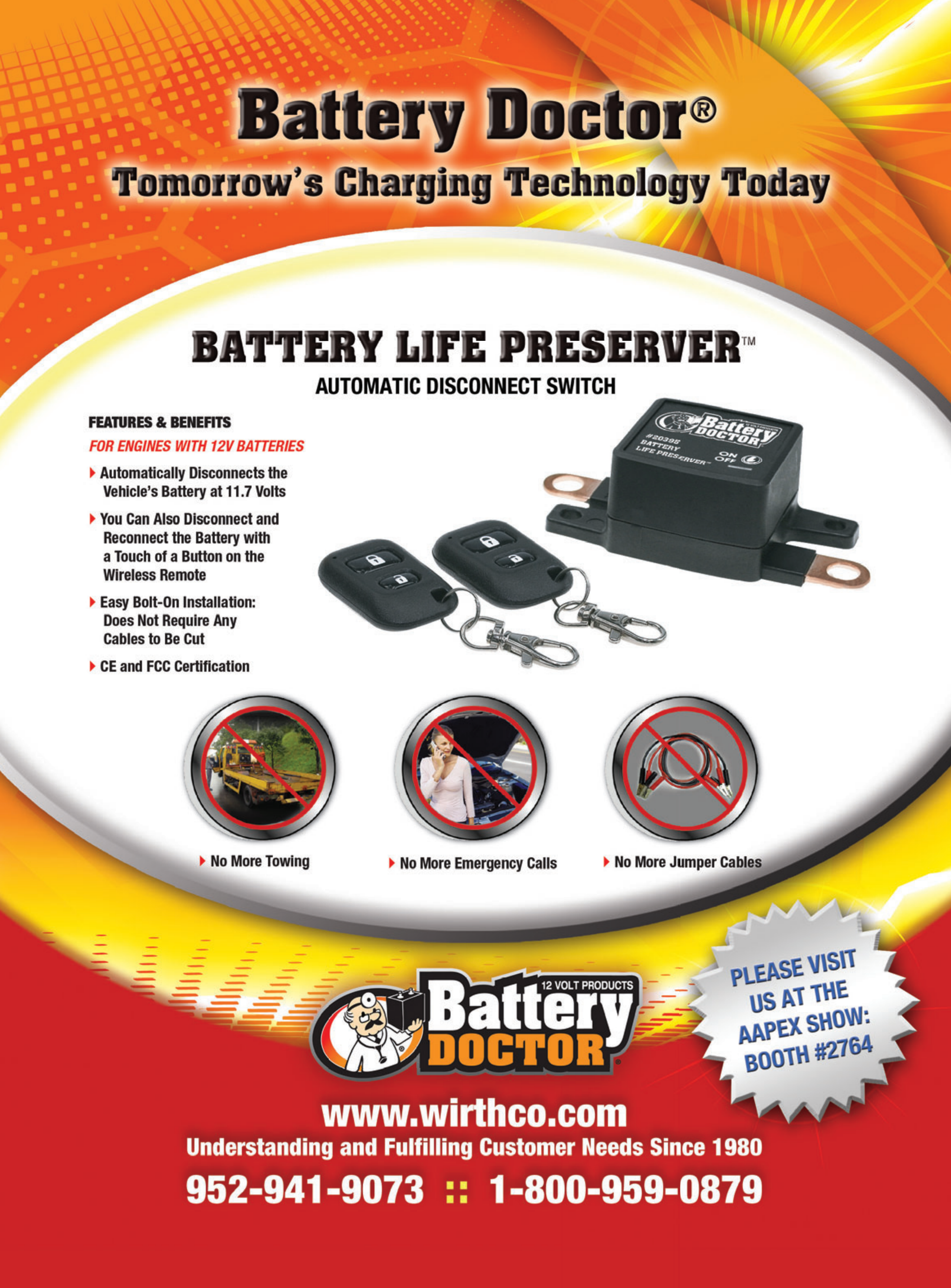
Availability	8%
Brand	10%
Quality	15%

Customer frequency of taking a battery charger recommendation

Always	31%
Sometimes	15%
Rarely	15%
Never	39%

Internet ordering frequency

0-10% of the time	95%
11-25% of the time	NA
26-50% of the time	NA
51-75% of the time	NA
76-99% of the time	NA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STUDY

TECHNICIAN ATTITUDE STUDY

BRAKES

Purchasing source

Auto parts retailer	68%
Warehouse distributor	58%
Jobber	39%
Dealership	41%
Direct from manufacturer	6%

Preferred purchasing channel

Auto parts retailer	43%
Warehouse distributor	26%
Jobber	17%
Dealership	7%

Primary reason for preferred supplier

Parts availability	25%
Good relationship	16%
Fast delivery	21%
Carries specific brands	30%

Margins

65% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	48%
6-10%*	28%
11-15%*	4%
16-25%*	8%
More than 25%	12%

What techs think they pay

1-5%*	16%
6-10%*	25%
11-15%*	29%
16-25%*	20%
More than 25%	10%

*Percent over jobber

56% of technicians always give recommendations for buying a specific brand of brakes.

Amount of brakes that are returned monthly

None	52%	5-9%	NA
1-2%	34%	10% +	1%
3-4%	7%	I don't know	6%

66% purchase **brakes** from a car dealership.

Reasons:

1. Only place available	39%
2. OEM form/fit/function	69%
3. Customer request	35%

Frequency of supplier contact

Once a week	23%
Every two weeks	1%
Once a month	17%
Every three months	13%
Every six months	3%
Yearly	6%
No contact necessary	36%

Brand vs. supplier loyalty

If a primary supplier of brakes replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 46%

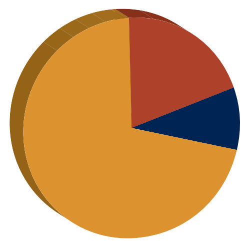
Keep primary supplier and purchase new brand 54%

National brands vs. private label purchases

71% National

9% Private

20% Both



Reason for buying a particular brake

Brand	49%
Quality	69%
Performance	45%

Customer frequency of taking a brake recommendation

Always	60%
Sometimes	31%
Rarely	5%
Never	4%

Internet ordering frequency

0-10% of the time	87%
100% of the time	NA
76-99% of the time	4%
26-50% of the time	7%
11-25% of the time	2%

LOOKING GOOD… FEELING GOOD

IMPROVES PEDAL FEEL
Patented "S-Groove" Slot Design**
Reduces Brake Fade

PREVENTS RUST AND CORROSION
Black Fusion and Grey Fusion Coatings
Improves Corrosion Resistance

INCREASED PAD LIFE
Patented "S-Groove" Slot Design
Extends Pad Life Up To 30%

APPLICATION SPECIFIC
2012 Chevrolet Silverado 1500
Raybestos® R-300™ Performance Rotor
P/N 580279PER *

Use your smart phone and connect to: Raybestos.com

** Visit www.Raybestos.com for full application listing. / ** Patent: D640,620*

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BRAKE PARTS INC

CABIN AIR FILTERS

Purchasing source

Auto parts retailer	54%
Warehouse distributor	41%
Jobber	43%
Dealership	36%
Direct from manufacturer	8%

Preferred purchasing channel

Auto parts retailer	28%
Warehouse distributor	20%
Jobber	25%
Dealership	12%

Primary reason for preferred supplier

Parts availability	48%
Good relationship	15%
Fast delivery	17%
Price	14%

Margins

67% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	34%
6-10%*	33%
11-15%*	22%
16-25%*	11%
More than 25%	NA

What techs think they pay

1-5%*	26%
6-10%*	33%
11-15%*	19%
16-25%*	14%
More than 25%	7%

*Percent over jobber

32% of technicians always give recommendations for buying a specific brand of cabin air filter.

Amount of this product that is returned monthly

None	78%	5-9%	NA
1-2%	17%	10% +	1%
3-4%	2%	I don't know	2%

59% purchase **cabin air filters** from a car dealership.

Reasons:

1. Only place available 52%
2. OEM form/fit/function 55%
3. OEM brand name 29%

Frequency of supplier contact

Once a week	19%
Every two weeks	5%
Once a month	16%
Every three months	2%
Every six months	5%
Yearly	5%
No contact necessary	47%

Brand vs. supplier loyalty

If a primary supplier of cabin air filters replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 19%

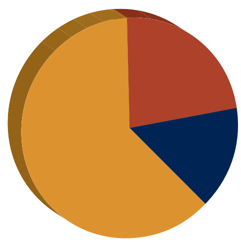
Keep primary supplier and purchase new brand 81%

National brands vs. private label purchases

62% National

15% Private

23% Both



Reason for buying a particular cabin air filter

Quality	30%
Availability	40%
Price	30%

Customer frequency of taking a cabin air filter recommendation

Always	50%
Sometimes	35%
Rarely	3%
Never	12%

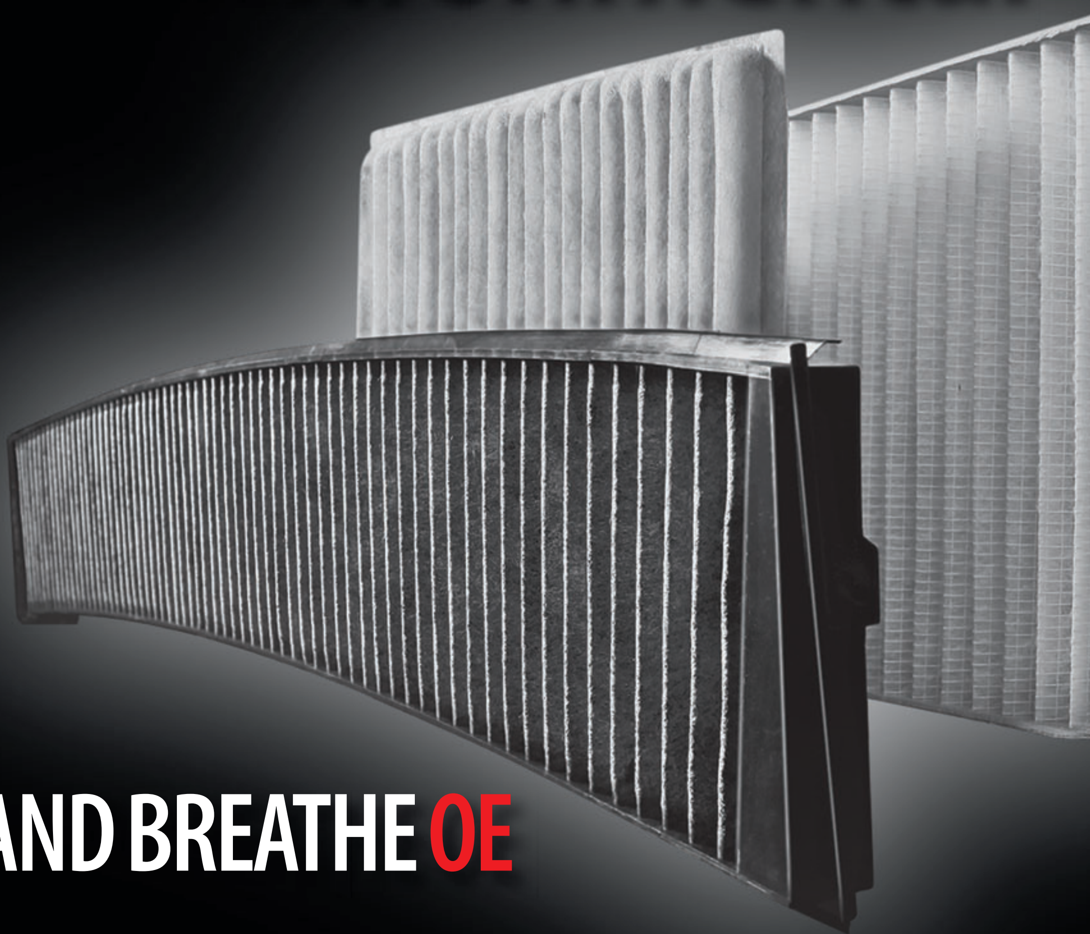
Internet ordering frequency

0-10% of the time	86%
100% of the time	7%
76-99% of the time	NA
51-75% of the time	4%
26-50% of the time	4%

DENSO

first time fit®

DENSO Environmental



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CHASSIS

Purchasing source

Warehouse distributor	52%
Auto parts retailer	52%
Jobber	48%
Dealership	50%
Direct from manufacturer	12%

Preferred purchasing channel

Auto parts retailer	26%
Warehouse distributor	36%
Jobber	22%
Direct from manufacturer	6%

Primary reason for preferred supplier

Parts availability	34%
Good relationship	24%
Price	10%
Carries specific brands	16%

Margins

70% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	50%
6-10%*	25%
11-15%*	8%
16-25%*	17%
More than 25%	NA

What techs think they pay

1-5%*	13%
6-10%*	28%
11-15%*	28%
16-25%*	22%
More than 25%	9%

*Percent over jobber

54% of technicians always give recommendations for buying a specific brand of chassis.

Amount of this product that is returned monthly

None	66%	5-9%	2%
1-2%	24%	10% +	NA
3-4%	6%	I don't know	2%

31% do not purchase chassis from a car dealership.

Reasons:

1. Too expensive 59%
2. Aftermarket products as good as (or better than) OEM 38%
3. Limited stock/don't stock 28%

Frequency of supplier contact

- Once a week 16%
- Every two weeks 14%
- Once a month 14%
- Every three months 2%
- Every six months 10%
- Yearly 10%
- No contact necessary 34%

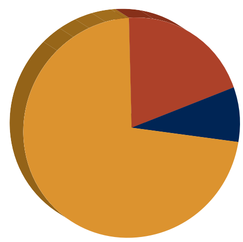
Brand vs. supplier loyalty

If a primary supplier of chassis replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 31%

Keep primary supplier and purchase new brand 69%

National brands vs. private label purchases



72% National

8% Private

20% Both

Reason for buying a particular chassis

Quality	52%
Performance	32%
Brand	48%

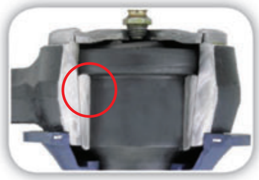
Customer frequency of taking a chassis recommendation

Always	61%
Sometimes	23%
Rarely	6%
Never	10%

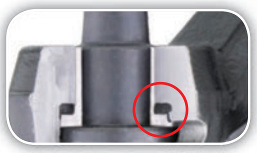
Internet ordering frequency

0-10% of the time	88%
76-99% of the time	2%
26-50% of the time	2%
51-75% of the time	NA
100% of the time	2%

ONE PART TOUGH GUY...
ONE PART SMOOTH OPERATOR



HIGH LOAD CAPACITY
One Piece Metal Bearing Design
Zero Side-to-Side Endplay



SMOOTH STEERING
Low-Friction Synthetic Bearing Design
Improved Returnability

APPLICATION SPECIFIC
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Raybestos Idler Arm
P/N 450-1102 *

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AVAILABLE AT CARQUEST AUTO PARTS

** Visit www.RaybestosChassis.com for full application listing.*

TECHNICIAN ATTITUDE STUDY

DIAGNOSTIC TOOLS

Purchasing source

Auto parts retailer	23%
Internet	32%
Jobber	23%
Tool/truck dealer	68%
Direct from manufacturer	49%

Preferred purchasing channel

Tool/truck dealer	47%
Internet	8%
Jobber	8%
Direct from manufacturer	25%

Primary reason for preferred supplier

Availability	4%
Good relationship	35%
Price	23%
Carries specific brands	35%

Margins

85% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	14%
6-10%*	43%
11-15%*	29%
16-25%*	NA
More than 25%	14%

What techs think they pay

1-5%*	15%
6-10%*	15%
11-15%*	17%
16-25%*	32%
More than 25%	22%

*Percent over jobber

75% of technicians always give recommendations for buying a specific brand of diagnostic tool.

Amount of diagnostic tools that are returned monthly

None	94%	5-9%	NA
1-2%	2%	10% +	NA
3-4%	NA	I don't know	4%

84% do not purchase **diagnostic tools** from a car dealership.

Reasons:

1. Too expensive	71%
2. Aftermarket as good	32%
3. Difficult to work with	27%

Frequency of supplier contact

Once a week 25%
Every two weeks .... NA
Once a month 15%
Every three months................. 10%
Every six months..................... 13%
Yearly 6%
No contact necessary............. 31%

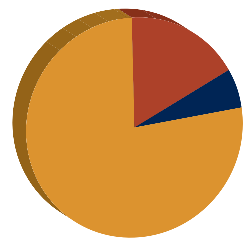
Brand vs. supplier loyalty

If a primary supplier of diagnostic tool replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 62%

Keep primary supplier and purchase new brand 38%

National brands vs. private label purchases



77% National
6% Private
17% Both

Reason for buying a particular diagnostic tool

Quality	56%
Performance	67%
Compatibility	53%

Customer frequency of taking a diagnostic tool recommendation

Always	52%
Sometimes	10%
Rarely	2%
Never	35%

Internet ordering frequency

0-10% of the time	63%
100% of the time	NA
76-99% of the time	2%
26-50% of the time	10%
11-25% of the time	18%

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Serious professionals trust INNOVA® expert diagnostic tools to help them make fast, accurate and profitable repair decisions.
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Displays the Diagnostic Trouble Code (DTC) number
DTC definitions, freeze frame and live data
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I/M MONITOR STATUS
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2. Temporary system deactivation: DRS initialisation
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STUDY

TECHNICIAN ATTITUDE STUDY

FUEL PUMPS

Purchasing source

Dealership	52%
Auto parts retailer	45%
Warehouse distributor	35%
Jobber	53%
Dealership	47%

Preferred purchasing channel

Auto parts retailer	28%
Warehouse distributor	17%
Jobber	40%
Dealership	8%

Primary reason for preferred supplier

Parts availability	35%
Fast delivery	15%
Price	13%
Good relationship	24%

Margins

94% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	75%
6-10%*	25%
11-15%*	NA
16-25%*	NA
More than 25%	NA

What techs think they pay

1-5%*	18%
6-10%*	37%
11-15%*	15%
16-25%*	17%
More than 25%	13%

*Percent over jobber

32% of technicians always give recommendations for buying a specific brand of fuel pump.

Amount of fuel pumps that are returned monthly

None	63%	5-9%	2%
1-2%	26%	10% +	NA
3-4%	2%	I don't know	7%

70% purchase fuel pumps from a car dealership.

Reasons:

1. Only place available 67%
2. OEM form/fit/function 61%
3. For OEM brand name 21%

Frequency of supplier contact

Once a week 20%
Every two weeks 9%
Once a month 9%
Every three months 4%
Every six months .... NA
Yearly .... NA
No contact necessary 58%

Brand vs. supplier loyalty

If a primary supplier of fuel pumps replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 46%

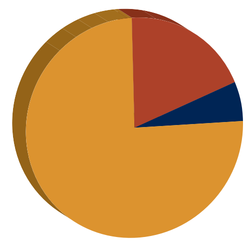
Keep primary supplier and purchase new brand 54%

National brands vs. private label purchases

75% National

6% Private

19% Both



Reason for buying a particular fuel pump

Quality	51%
Warranty	39%
Availability	39%

Customer frequency of taking a fuel pump recommendation

Always	53%
Sometimes	38%
Rarely	5%
Never	4%

Internet ordering frequency

0-10% of the time	96%
100% of the time	2%
11-25% of the time	2%
76-99% of the time	NA
51-75% of the time	NA

STUDY

TECHNICIAN ATTITUDE STUDY

GASKETS

Purchasing source

Dealership	54%
Auto parts retailer	66%
Warehouse distributor	34%
Jobber	43%
Direct from manufacturer	13%

Preferred purchasing channel

Auto parts retailer	34%
Warehouse distributor	21%
Jobber	23%
Dealership	12%

Primary reason for preferred supplier

Parts availability	41%
Carries specific brands	14%
Good relationship	16%
Fast delivery	18%

Margins

68% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	34%
6-10%*	33%
11-15%*	25%
16-25%*	8%
More than 25%	NA

What techs think they pay

1-5%*	19%
6-10%*	28%
11-15%*	25%
16-25%*	22%
More than 25%	6%

*Percent over jobber

43% of technicians always give recommendations for buying a specific brand of gasket.

Amount of gaskets that are returned monthly

None	41%	5-9%	13%
1-2%	43%	10% +	NA
3-4%	N/A	I don't know	3%

83% purchase gaskets from a car dealership.

Reasons:

1. Only place available 67%
2. OEM form/fit/function 67%
3. OEM brand name 24%

Frequency of supplier contact

Once a week 12%
Every two weeks 7%
Once a month 12%
Every three months 2%
Every six months 2%
Yearly 2%
No contact necessary 63%

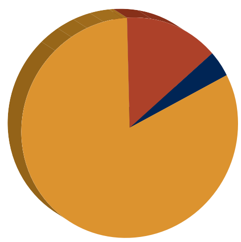
Brand vs. supplier loyalty

If a primary supplier of gaskets replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 47%

Keep primary supplier and purchase new brand 53%

National brands vs. private label purchases



Reason for buying a particular gasket

Brand	35%
Quality	51%
Availability	38%

Customer frequency of taking a gasket recommendation

Always	69%
Sometimes	21%
Rarely	NA
Never	10%

Internet ordering frequency

0-10% of the time	88%
100% of the time	2%
26-50% of the time	3%
11-25% of the time	5%
51-75% of the time	2%

TECHNICIAN ATTITUDE STUDY

LIGHTING

Purchasing source

Auto parts retailer	61%
Jobber	46%
Warehouse distributor	36%
Dealership	25%
Direct from manufacturer	25%

Preferred purchasing channel

Auto parts retailer	21%
Warehouse distributor	11%
Jobber	21%
Direct from manufacturer	18%

Primary reason for preferred supplier

Parts availability	21%
Good relationship	18%
Fast delivery	18%
Carries specific brands	18%

Margins

81% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	NA
6-10%*	40%
11-15%*	20%
16-25%*	20%
More than 25%	20%

What techs think they pay

1-5%*	32%
6-10%*	24%
11-15%*	8%
16-25%*	20%
More than 25%	16%

*Percent over jobber

32% of technicians always give recommendations for buying a specific brand of lighting.

Amount of lighting that are returned monthly

None	55%	5-9%	10%
1-2%	14%	10% +	NA
3-4%	10%	Don't know	11%

69% do not purchase lighting from a car dealership.

Reasons:

1. Too expensive 52%
2. Aftermarket products as good as (or better than) OEM 20%
3. Limited stock/don't stock 48%

Frequency of supplier contact

Once a week	14%
Every two weeks	NA
Once a month	7%
Every three months	7%
Every six months	NA
Yearly	NA
No contact necessary	72%

Brand vs. supplier loyalty

If a primary supplier of lighting replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 54%

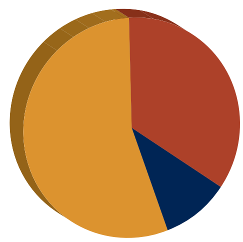
Keep primary supplier and purchase new brand 46%

National brands vs. private label purchases

55% National

10% Private

35% Both



Reason for buying a particular lighting

Quality	9%
Compatibility	10%
Availability	10%

Customer frequency of taking a lighting recommendation

Always	25%
Sometimes	50%
Rarely	7%
Never	18%

Internet ordering frequency

0-10% of the time	74%
11-25% of the time	10%
26-50% of the time	13%
51-75% of the time	3%
100% of the time	NA

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TECHNICIAN ATTITUDE STUDY

OXYGEN SENSORS

Purchasing source

Auto parts retailer	46%
Jobber	52%
Warehouse distributor	21%
Direct from manufacturer	15%
Dealership	49%

Preferred purchasing channel

Auto parts retailer	21%
Jobber	33%
Warehouse distributor	15%
Dealership	21%

Primary reason for preferred supplier

Parts availability	49%
Price	9%
Good relationship	18%
Fast delivery	15%

Margins

87% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	60%
6-10%*	40%
11-15%*	NA
16-25%*	NA
More than 25%	NA

What techs think they pay

1-5%*	15%
6-10%*	42%
11-15%*	8%
16-25%*	27%
More than 25%	8%

*Percent over jobber

36% of technicians always give recommendations for buying a specific brand of oxygen sensor.

Amount of oxygen sensors that are returned monthly

None	80%	5-9%	NA
1-2%	14%	10% +	NA
3-4%	3%	I don't know	3%

63% purchase oxygen sensors from a car dealership.

Reasons:

1. OEM form/fit/function	74%
2. Only place its available	42%
3. OEM brand name	31%
3. Warranty	31%

Frequency of supplier contact

Once a week	19%
Every two weeks	13%
Once a month	3%
Every three months	NA
Every six months	3%
Yearly	6%
No contact necessary	56%

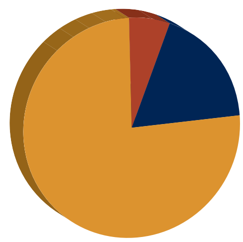
Brand vs. supplier loyalty

If a primary supplier of oxygen sensors replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 55%

Keep primary supplier and purchase new brand 45%

National brands vs. private label purchases



76% National

18% Private

6% Both

Reason for buying a particular oxygen sensor

Brand	32%
Warranty	28%
Quality	37%

Customer frequency of taking a oxygen sensor recommendation

Always	56%
Sometimes	31%
Rarely	7%
Never	6%

Internet ordering frequency

0-10% of the time	97%
11-25% of the time	3%
76-99% of the time	NA
100% of the time	NA
26-50% of the time	NA

STUDY

TECHNICIAN ATTITUDE STUDY

SHOCKS & STRUTS

Purchasing source

Auto parts retailer	62%
Warehouse distributor	45%
Jobber	47%
Dealership	26%
Direct from manufacturer	10%

Preferred purchasing channel

Auto parts retailer	39%
Warehouse distributor	19%
Jobber	27%
Direct from manufacturer	10%

Primary reason for preferred supplier

Parts availability	36%
Carries specific brands	16%
Good relationship	18%
Fast delivery	16%

Margins

75% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	62%
6-10%*	15%
11-15%*	8%
16-25%*	15%
More than 25%	NA

What techs think they pay

1-5%*	8%
6-10%*	37%
11-15%*	34%
16-25%*	13%
More than 25%	8%

*Percent over jobber

38% of technicians always give recommendations for buying a specific brand of shocks & struts.

Amount of shocks & struts that are returned monthly

None	76%	5-9%	NA
1-2%	13%	10% +	NA
3-4%	4%	I don't know	7%

47% do not purchase these from a car dealership.

Reasons:

1. Too expensive 56%
2. Aftermarket products as good as (or better than) OEM 38%
3. Limited stock/don't stock 23%

Frequency of supplier contact

Once a week	16%
Every two weeks	5%
Once a month	5%
Every three months	9%
Every six months	8%
Yearly	12%
No contact necessary	45%

Brand vs. supplier loyalty

If a primary supplier of shocks & struts replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 40%

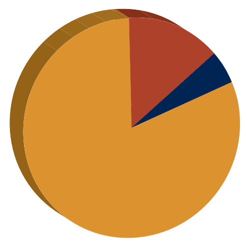
Keep primary supplier and purchase new brand 60%

National brands vs. private label purchases

81% National

5% Private

14% Both



Reason for buying a particular shock or strut

Quality	48%
Availability	50%
Warranty	44%

Customer frequency of taking a shock & strut recommendation

Always	63%
Sometimes	30%
Rarely	7%
Never	NA

Internet ordering frequency

0-10% of the time	79%
76-99% of the time	2%
100% of the time	2%
11-25% of the time	10%
26-50% of the time	7%

STUDY

TECHNICIAN ATTITUDE STUDY

SPARK PLUGS

Purchasing source

Auto parts retailer	69%
Jobber	39%
Warehouse distributor	41%
Dealership	51%
Direct from manufacturer	7%

Preferred purchasing channel

Auto parts retailer	41%
Warehouse distributor	18%
Jobber	31%
Dealership	5%

Primary reason for preferred supplier

Parts availability	45%
Price	18%
Good relationship	15%
Fast delivery	13%

Margins

76% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	30%
6-10%*	30%
11-15%*	10%
16-25%*	30%
More than 25%	NA

What techs think they pay

1-5%*	23%
6-10%*	23%
11-15%*	31%
16-25%*	17%
More than 25%	6%

*Percent over jobber

56% of technicians always give recommendations for buying a specific brand of spark plugs.

Amount of spark plugs that are returned monthly

None	68%	5-9%	NA
1-2%	13%	10% +	3%
3-4%	8%	I don't know	8%

54% purchase spark plugs from a car dealership.

Reasons:

1. Only place available	62%
2. OEM form/fit/function	62%
3. Customer request	24%

Frequency of supplier contact

Once a week 10%
Every two weeks 8%
Once a month 13%
Every three months .... NA
Every six months 3%
Yearly 3%
No contact necessary 63%

Brand vs. supplier loyalty

If a primary supplier of spark plugs replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 62%

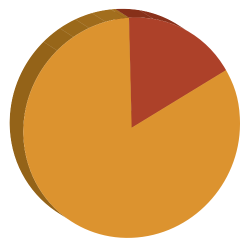
Keep primary supplier and purchase new brand 39%

National brands vs. private label purchases

83% National

NA Private

17% Both



Reason for buying a particular spark plug

Quality	32%
Compatibility	34%
Brand	53%

Customer frequency of taking a spark plug recommendation

Always	66%
Sometimes	18%
Rarely	3%
Never	13%

Internet ordering frequency

0-10% of the time	97%
51-75% of the time	3%
76-99% of the time	NA
100% of the time	NA
26-50% of the time	NA

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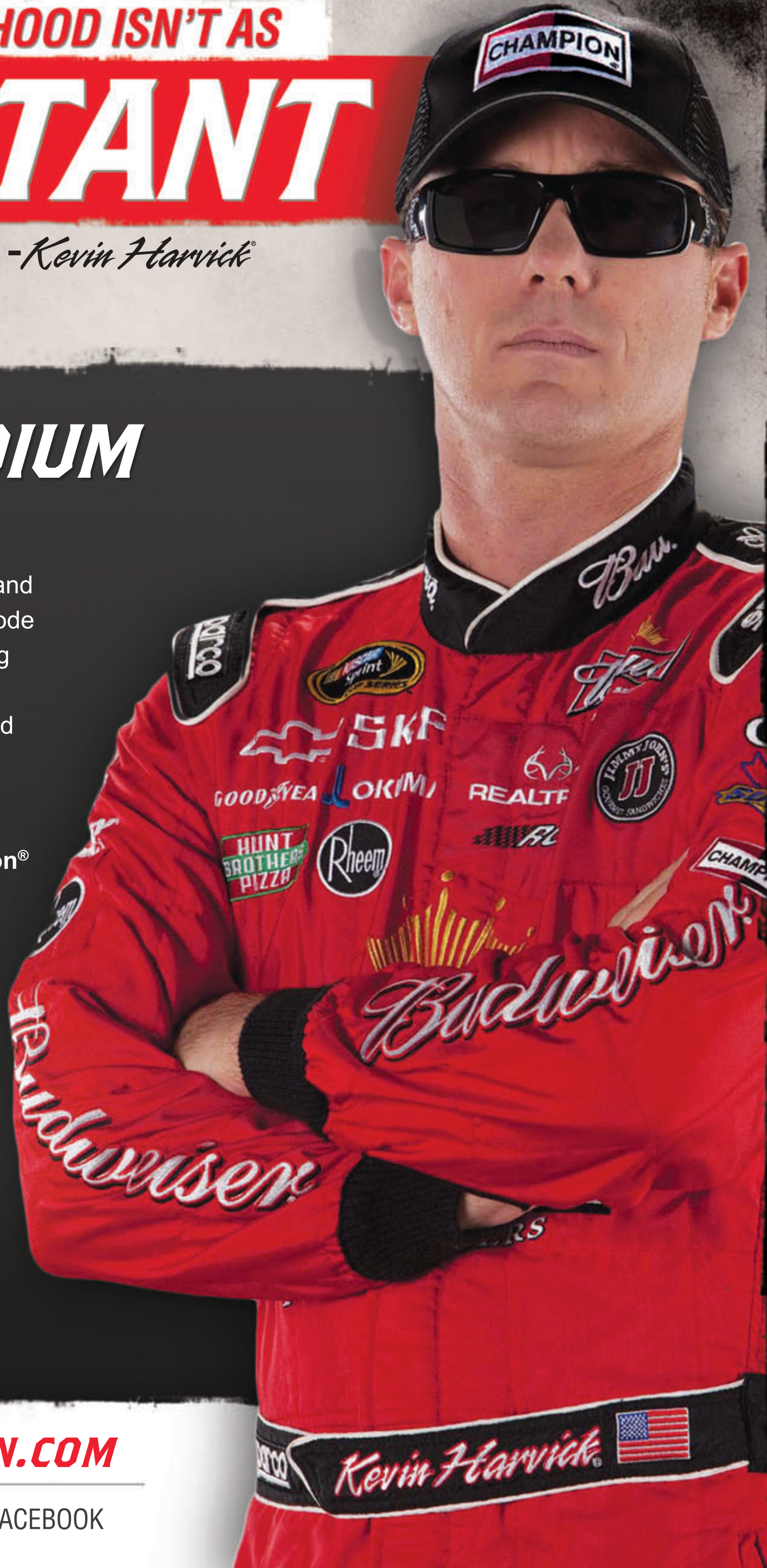

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STUDY

TECHNICIAN ATTITUDE STUDY

WATER PUMPS

Purchasing source

Auto parts retailer	66%
Warehouse distributor	34%
Jobber	53%
Dealership	44%
Internet	9%

Preferred purchasing channel

Warehouse distributor	19%
Jobber	25%
Auto parts retailer	41%
Dealership	12%

Primary reason for preferred supplier

Fast delivery	16%
Parts availability	41%
Good relationship	19%
Carries specific brands	19%

Margins

70% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	40%
6-10%*	40%
11-15%*	10%
16-25%*	10%
More than 25%	NA

What techs think they pay

1-5%*	17%
6-10%*	21%
11-15%*	29%
16-25%*	25%
More than 25%	8%

*Percent over jobber

52% of technicians always give recommendations for buying a specific brand of water pump.

Amount of wate pumps that are returned monthly

None	81%	5-9%	NA
1-2%	10%	10% +	NA
3-4%	N/A	I don't know	9%

61% purchase water pumps from a car dealership.

Reasons:

1. Only place available 58%
2. OEM form/fit/fuction 53%
3. OEM brand name 21%

Frequency of supplier contact

Once a week 6%
Every two weeks 6%
Once a month 12%
Every three months 6%
Every six months........................ 9%
Yearly 3%
No contact necessary 58%

Brand vs. supplier loyalty

If a primary supplier of water pumps replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 19%

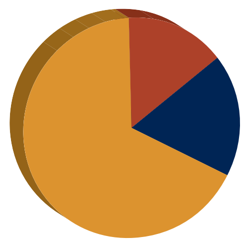
Keep primary supplier and purchase new brand 81%

National brands vs. private label purchases

67% National

18% Private

15% Both



Reason for buying a particular water pump

Quality	45%
Warranty	50%
Availability	48%

Customer frequency of taking a water pump recommendation

Always	70%
Sometimes	12%
Rarely	6%
Never	12%

Internet ordering frequency

0-10% of the time	97%
11-25% of the time	NA
51-75% of the time	NA
76-99% of the time	3%
100% of the time	NA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WHEEL BEARINGS

Purchasing source

Auto parts retailer	60%
Warehouse distributor	36%
Jobber	52%
Dealership	32%
Internet	4%

Preferred purchasing channel

Warehouse distributor	13%
Jobber	38%
Auto parts retailer	38%
Dealership	4%

Primary reason for preferred supplier

Fast delivery	8%
Parts availability	56%
Good relationship	24%
Carries specific brands	8%

Margins

67% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	38%
6-10%*	50%
11-15%*	NA
16-25%*	12%
More than 25%	NA

What techs think they pay

1-5%*	19%
6-10%*	6%
11-15%*	25%
16-25%*	38%
More than 25%	13%

*Percent over jobber

52% of technicians always give recommendations for buying a specific brand of wheel bearing.

Amount of wheel bearings that are returned monthly

None	71%	5-9%	NA
1-2%	13%	10% +	NA
3-4%	4%	Don't know	12%

52% do not purchase these from a car dealership.

Reasons:

1. Too expensive 48%
2. Aftermarket product as good as (or better than) OE 28%
3. Limited stock 38%

Frequency of supplier contact

Once a week	4%
Every two weeks	4%
Once a month	13%
Every three months	12%
Every six months	4%
Yearly	17%
No contact necessary	46%

Brand vs. supplier loyalty

If a primary supplier of wheel bearings replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 24%

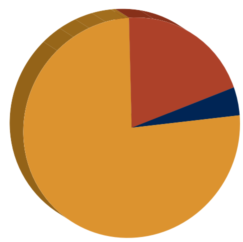
Keep primary supplier and purchase new brand 76%

National brands vs. private label purchases

76% National

4% Private

20% Both



Reason for buying a particular wheel bearing

Quality	50%
Availability	50%
Warranty	40%

Customer frequency of taking a wheel bearing recommendation

Always	52%
Sometimes	32%
Rarely	4%
Never	12%

Internet ordering frequency

0-10% of the time	96%
11-25% of the time	NA
51-75% of the time	NA
76-99% of the time	4%
100% of the time	NA

TECHNICIAN ATTITUDE STUDY

WIPERS

Purchasing source

Auto parts retailer	61%
Warehouse distributor	33%
Jobber	33%
Dealership	12%
Direct from manufacturer	9%

Preferred purchasing channel

Warehouse distributor	25%
Jobber	22%
Auto parts retailer	34%
Direct from manufacturer	6%

Primary reason for preferred supplier

Price	19%
Parts availability	22%
Good relationship	22%
Fast delivery	22%

Margins

87% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	40%
6-10%*	40%
11-15%*	NA
16-25%*	20%
More than 25%	NA

What techs think they pay

1-5%*	12%
6-10%*	28%
11-15%*	24%
16-25%*	24%
More than 25%	12%

*Percent over jobber

53% of technicians always give recommendations for buying a specific brand of wiper.

Amount of wipers that are returned monthly

None	81%	5-9%	NA
1-2%	10%	10% +	NA
3-4%	3%	I don't know	6%

62% do not purchase wipers from a car dealership.

Reasons:

1. Too expensive 58%
2. Aftermarket product as good as (or better than) OE 21%
3. Convenience/time limits 50%

Frequency of supplier contact

Once a week	16%
Every two weeks	10%
Once a month	10%
Every three months	3%
Every six months	10%
Yearly	10%
No contact necessary	42%

Brand vs. supplier loyalty

If a primary supplier of wipers replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand 37%

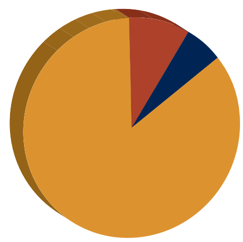
Keep primary supplier and purchase new brand 63%

National brands vs. private label purchases

85% National

6% Private

9% Both



Reason for buying a particular wiper

Quality	51%
Brand	54%
Availability	41%

Customer frequency of taking a wiper recommendation

Always	63%
Sometimes	34%
Rarely	NA
Never	3%

Internet ordering frequency

0-10% of the time	94%
11-25% of the time	3%
51-75% of the time	NA
76-99% of the time	3%
100% of the time	NA

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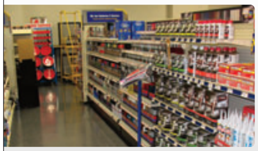


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All of Walker's MAF sensors are 100% new, not remanufactured. They are manufactured to meet or exceed OEM standards and specifications. Every shipment is tested in the USA against OEM units to maintain high standards. Over 132 SKUs cover over 7,000 applications; more model coverage with fewer SKUs.

www.walkerproducts.com
Walker Products AAPEX Booth 2261

EXHAUST TEMPERATURE SENSORS

Modern exhaust after treatment systems require control for efficiency and component protection. Walker Exhaust Temperature Sensors serve as a monitor for turbochargers, diesel oxidation catalysts, diesel particulate filters and selective catalytic reduction systems. The sensors are 100% OE and are manufactured to match the OE Exhaust Temperature Sensor. We offer over 300 SKUs covering over 11,000 applications.

www.walkerproducts.com
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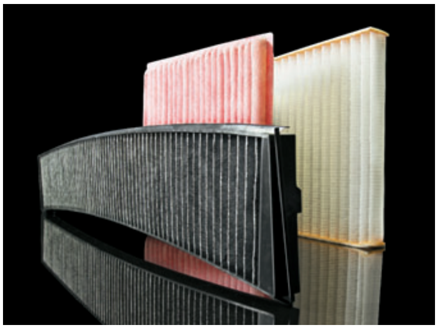
CABIN AIR FILTERS



The First Time Fit® Cabin Air Filter program offers 190 part numbers covering over 117 million vehicles for a full range of domestic and import applications. DENSO's electrostatically charged particulate filters capture ultra-fine particles such as diesel pollutants, soot and pollen. Charcoal filters feature a multi-layer filter structure embedded with activated charcoal that removes odors and captures harmful particles.

www.densocaf.com
DENSO AAPEX Booth 2226

WIPER BLADES

DENSO's First Time Fit® Wiper Blade program offers conventional, beam and designer styles, allowing a direct replacement of your original equipment blades. DENSO's wiper blades provide quiet, streak-free performance with its durable design. Quick and easy installation makes replacing wiper blades a snap. DENSO First Time Fit Wiper Blades deliver the engineering, quality and performance that makes them the best choice when it's time to see clearly.

www.densowipers.com
DENSO AAPEX Booth 2226

WHEEL HUB ASSEMBLIES

Quality-Built offers a premium line of all-new wheel hub assemblies for automotive applications. Each hub assembly is subjected to a multi-point quality inspection to ensure trouble-free installation and durability for the life of the product. Quality-Built is a division of Motorcar Parts of America (MPA).

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NEW AND REMAN ALTERNATORS

Quality-Built offers a premium line of new and remanufactured alternators for automotive applications. Units are produced and rigorously tested in ISO/TS 16949 certified facilities and are guaranteed to meet or exceed OE specifications. Heavy duty and power sports alternators are also available under Quality-Built's sister brands Xtreme-HD and Xtreme-PS. Quality-Built is a division of Motorcar Parts of America (MPA).

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AGM BATTERY

East Penn's Intimidator AGM batteries deliver two time the cycle life and 20 times the vibration resistance above and beyond conventional designs. Ideal for cars, trucks, commercial marine, EV, power sports or other vehicles that benefit from optimized accessory, starting and deep cycle power.

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