

# AFTERMARKET BUSINESS WORLD™

NOVEMBER 2014

# AUTOMECHANIKA FRANKFURT

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REPRESENTING 71 COUNTRIES

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# AUTOMECHANIKA FRANKFURT

**GROWS TO 4,600-PLUS  
EXHIBITORS REPRESENTING  
71 COUNTRIES**

BY PETE MEIER | Motor Age Technical Editor

My German is not as good as it once was, but it was still good enough to identify the train I needed to take from the Frankfurt Central Station to Frankfurt Messe, the Frankfurt Fairgrounds, home to Automechanika Frankfurt. The final stop is nestled in the center of the venue, providing attendees with an easy way to travel to the show.

Automechanika Frankfurt was first held in 1971, as a result of trying political and economic times. If you're old enough to remember, those were the days of the OPEC oil embargo and the Cold War was still in full effect. Western

nations were becoming more aware of their dependence on oil and the call for better fuel efficiency began. The 2014 show marks the 23rd event (the show is held every two years) and it has grown to fill the nearly 3.2 million square feet of available show space. Some 4,631 exhibitors representing 71 countries and nearly every aspect of the automotive (and related) industries were there. In addition to the big show in Frankfurt, the Automechanika brand has spread to 12 additional locations

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## Analysis by market

### REPLACEMENT

**Vendors:** Brake producers moving to stop use of copper as an ingredient.

### EMERGING

**Technology:** GM to roll out V2V in 2017.

### INTERNATIONAL

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**Commercial Vehicle Remanufacturing:** Electronics remanufacturing is emerging as a growth segment in the Class 6-8 aftermarket.

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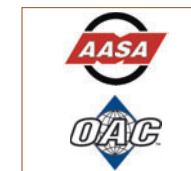
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## Opinion



**Donny Seyfer**  
Taking a strategic approach to older vehicles



**AASA's OAC**  
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**Larry Silvey**  
Making the aftermarket a forethought



**Mark Smith**  
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NHTSA mulls changes to tire ID numbers

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# Automechanika Frankfurt



A 14th Automechanika venue will be debuting, Automechanika Chicago, April 24-26, 2015.



worldwide, including cities like Moscow, Shanghai and Dubai.

Soon, a 14th venue will debut with the Automechanika name - Automechanika Chicago, coming to McCormick Place West April 24-26, 2015. The newest member of the Automechanika family will be a partnership between Automechanika and Advanstar, parent company of *Motor Age*, *ABRN* and *Aftermarket Business World* and a national trade show provider in its own right. The new show is slated to feature 100,000 square feet of exhibition space and an all-star training conference that will feature 120 high-end training sessions over the 2.5 days the trade show is open.

My involvement in the training conference (*Motor Age Training LIVE*) was one of the reasons I was invited to attend the Frankfurt show. The basic formatting of both shows was to be similar, with exhibitors grouped by category making it easier for attendees to focus on whatever area of specialty they wanted. My primary interest was, naturally, in "Repair and Maintenance" with a few side trips as time allowed.

A few stops were by invitation; specifically my stops at the Brembo and LIQUI-MOLY booths, where I had time set aside to learn all I could about what was happening with their companies and the impact they were making in the aftermarket here in the U.S.

Even though I was there for two full days, I could still only cover about half of the event. It was fun to turn a corner and see an American exhibit that I was familiar with and talk to reps that I had met at other shows in the U.S., like Powerprobe, Neutronics, Ross-Tech, AirSept, Drew Technologies and several more. It was also interesting to see that concerns faced in the U.S. are faced overseas as well. There was a lot of conversation on training, for example. The need for it, the lack of availability, the need to support educators and vocational programs - all the same conversations we have here.

Automechanika Frankfurt offered several ways to get training in response to that need. One was the Automechanika Academy, a series of lectures and traditional classroom presentations. ...CONTINUE READING ▢



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# VENDORS

## ‘Complimentary’ is defining word as ZF acquires TRW for \$13.5 billion

BY JAMES E. GUYETTE  
News Correspondent

While it is too early to be sure, it appears that ZF Friedrichshafen’s pending purchase of TRW will eschew the typical plant shutdowns and layoffs in favor of continued international expansion-minded innovations and increased job prospects – especially in Detroit and elsewhere throughout the U.S.

### TRENDS & MARKET Analysis

“The mood is pretty positive,” according to a longtime TRW executive, telling *Aftermarket Business World* that the attitude among the workforce “is good and relatively upbeat; we feel that this will be a good combination once it happens. This is not really an acquisition,” he asserts. “It’s complimentary. We are looking to be run as a separate business unit.”

“The combination makes sense for all of our constituencies,” concurs ZF CEO Stefan

Vendor Newsmaker

### Q&A

EYAL ARONOFF  
Co-founder of the Fuel Freedom Foundation



How do you assess the viability of the alternative fuels market and what replacement fuels do you propose?



What did Aronoff say? Continue reading online.

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Sommer. “Customers of both companies will have access to a unique offering under one roof, and employees from ZF and TRW will enjoy enhancements that result from the combined organization,” he notes.



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“The combined firm is slated to become the second-largest auto parts supplier after Bosch.”

“This is an acquisition in the spirit of a partnership,” Sommer says. “We look forward to welcoming TRW’s employees to our company and are committed to working closely with them to realize the potential of this exciting combination. The Detroit metro area will remain a major business center for the company, and we expect employees from both companies to benefit from the enhanced career opportunities at a larger, more diversified company.”

“The current industry consolidation certainly comes as no surprise,” says Bill Long, president and COO of the Automotive Aftermarket Suppliers Association (AASA). The organization has been steadily predicting that this trend will remain ongoing throughout the industry.

“Mergers or acquisitions provide the greatest value when leveraging innovation, technologies and processes, rather than those based purely on scale or size,” Long observes, citing AASA’s research.

“Suppliers’ growth strategies also must include investment in building differentiating capabilities and evolving their business mod-

els,” Long explains. “Differentiation requires investments in information technology, analytical tools, processes, infrastructure and more. Suppliers must innovate and differentiate to succeed in today’s competitive marketplace.”

“The acquisition of TRW fits perfectly into our long-term strategy,” says Sommer. “The transaction combines two highly successful companies that have remarkable track records of innovation and growth and solid financial positions,” he adds. “We are strengthening our future prospects by enlarging our product portfolio with acknowledged technologies in the most attractive segments.”

### Distinguished histories

ZF is paying about \$13.5 billion for TRW, and the combined firm is slated to become the world’s second-largest auto parts supplier behind Bosch at No. 1.

TRW’s stockholders will be voting whether to accept the terms of the deal, and several law firms ...CONTINUE READING □

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# DEALERSHIPS

## Online recall look-up tool launched

NHTSA, dealers hope to boost completion rates as number of recalls skyrockets

**BY BRIAN ALBRIGHT**  
Correspondent

Against a backdrop of increasing automotive recalls, the National Highway Traffic Safety Administration (NHTSA) has gone live with its online VIN-based recall search tool at [SaferCar.gov/vinlookup](http://SaferCar.gov/vinlookup).

Under a recent NHTSA mandate, all major light vehicle and motorcycle manufacturers are required to provide VIN search capability for uncompleted recalls on their own websites, with the data updated weekly. NHTSA's new VIN look-up tool relies on this information from those sites.

### TRENDS & MARKET Analysis

"Safety is our highest priority, and an informed consumer is one of our strongest allies in ensuring recalled vehicles are repaired," said U.S. Transportation Secretary Anthony Foxx when the service was announced in

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### Dealer Newsmaker

### Q&A

**BRIAN DREWS**  
Parts Manager,  
DeNooyer Chevrolet



How heavy has the volume been for the GM recalls? Have there been delays in getting parts for the recalls?



What did Drews say? Continue reading online.

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August. "Starting today car owners, shoppers, and renters can find out if a specific vehicle has a safety defect that needs to be fixed – using our free online tool."

There are some limitations to the database. According to a NHTSA spokesperson, the



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“Less than 75 percent of recalled vehicles actually wind up being brought to a dealership for repairs.”

tool does not provide look-ups for all cars. “Only vehicle manufacturers that produce 25,000 or more light vehicles annually and manufacturers that produce 5,000 or more motorcycles annually are required to support the tool, although any vehicle manufacturer may choose to participate,” the spokesperson said. A list of current participants is on the site.

It is estimated that less than 75 percent of most recalled vehicles actually wind up being brought to a dealership for repairs. By establishing the VIN-searchable database, NHTSA hopes to increase the completion rate.

“The new online look-up tool will help new-car dealerships identify whether a used car or light truck has an unremediated safety recall prior to making a purchase or taking in a trade,” said Forrest McConnell, chairman of the National Automobile Dealers Association (NADA). “It will also help dealerships to determine whether used vehicles in inventory are under recall and to provide used-car shoppers with useful safety recall information.

“To improve vehicle safety, NADA urges every car owner who receives a recall notice from a manufacturer to visit his or her local new-car dealership to have the vehicle inspected, and if necessary, fixed at no charge,” McConnell continued.

NHTSA is working with NADA and franchised dealerships across the U.S. to ensure the dealers are able to effectively use the new search tool.

The NHTSA database may also make it easier for used car dealers and independent aftermarket repair shops to check for recalls on customer vehicles, and then direct them to a dealership to have the repairs completed. While there is no economic incentive for recall referrals, it can generate goodwill with customers.

### Low recall completion rates

The searchable database was developed in part because of the rapidly increasing number of ...CONTINUE READING □

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# TECHNOLOGY SOLUTIONS

## GM to roll out V2V in 2017

NHTSA to mandate wireless vehicle-to-vehicle communications in light vehicles

BY BRIAN ALBRIGHT  
Correspondent

Vehicle-to-vehicle (V2V) and vehicle-to-infrastructure (V2I) technology will make its debut in the GM product line as early as 2017. At the Intelligent Transport System World Congress in Detroit in September, GM CEO Mary Barra announced that V2V technology would be included in the 2017 Cadillac CTS.

### TRENDS & MARKET Analysis

The Cadillac will be the first commercially available vehicle with the technology (so far), which has been piloted and tested by a number of other manufacturers. That announcement followed the National Highway Traffic Safety Administration's (NHTSA) release of an advance notice of proposed rulemaking that marks the first step toward mandating V2V in light vehicles.

"Thanks to V2V, OnStar and a full suite of active safety features, we believe the CTS will be one of the most, if not the most, intelligent

### Technology Newsmaker

#### Q&A

JOE SWAIM

Senior Business Application Consultant, International Business Systems



How are the needs of small/mid sized businesses different than larger ones when it comes to supply chain technology?



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production vehicles on the road," Barra said at the conference.

In addition, the semi-autonomous Super Cruise system will make its debut on an all-new 2014 Cadillac vehicle. Super Cruise combines radar, ultrasonic sensors, cameras and GPS enabling



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-Jack Roush  
Chairman, Roush Enterprises

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Delphi will provide the V2V/V2I technology in the CTS using software from Cohda Wireless.



hands-off lane following, speed control and braking in certain driving scenarios. Typically it would be used on freeways, in traffic jams and on long road trips.

The V2V/V2I technology in the CTS, as well as the Super Cruise system, will be provided by Delphi using application software developed by Cohda Wireless and NXP Semiconductors' wireless chipset. V2V is based on a technology dedicated short-range communications (DSRC), which follows the IEEE 802.11p standard for wireless communications.

The V2V system uses radio signals to transmit traffic data from car to car to alert drivers of potential hazards. It can signal traffic situations that include hazards, roadwork, emergency vehicle warnings, slow-moving or stationary vehicles, traffic jams, accidents, signals and signage indicators. The technology is expected to complement existing Delphi vision and radar systems that warn drivers about potential accident risks.

"Delphi's V2V technology goes a step further by reading radio signals sent from cars that have already detected a traffic situation,"

says Karsten Fels, global engineering director, infotainment and driver interface, at Delphi Automotive. "This data is then sent to other cars in the vicinity to warn their drivers and provide detailed information about the situation, such as location and duration of a construction zone."

V2V utilizes sensor information from neighboring vehicles, enabling sensor fusion, and adding visible and invisible information about the surrounding vehicles. "For an active safety system this results in a massive extension of coverage, while collecting information about what's going on around the vehicle's position," Fels adds.

According to the company, the systems may not be used for "convenience" warnings about speed traps, or for general communications. It's also not intended for transferring infotainment content such as audio or video streaming.

The primary focus is on accident avoidance and safety. NHTSA has previously reported that this type of V2V and V2I communication ...CONTINUE READING □



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# VENDORS

## Brake producers moving to stop use of copper as an ingredient

BY JAMES E. GUYETTE  
News Correspondent

A series of new regulations limiting the copper content of brake components – including a provision that took effect at the beginning of this year – do not put a stop to selling and installing industry products already on the marketplace.

“Existing inventories don’t need to be discarded, returned, exchanged, sent back or repackaged,” says Frank Filipponio, communications director for Centric Parts/StopTech.

### TRENDS & MARKET Analysis

“There is a lot of confusion in the market right now about compliance with the law, and it has led to some misinformation about existing inventories,” he notes.

The most immediate change is in labeling. All brake pads and shoes manufactured after Jan. 1, 2014 are required to have appropriate labels indicating compliance with state regula-

More articles by **JAMES E. GUYETTE**

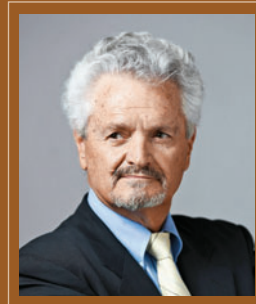
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## Q&A

**LOU CAMILLI**

Founder, President and CTO,  
Enerpulse



How do the Pulstar spark plugs differ from others in the marketplace?



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tions regarding friction material compounds, says Filipponio.

“However, a key provision of both the California and Washington State legislation grants motor vehicle manufacturers and



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Copper has been the primary substrate used in friction materials to dissipate thermal energy.



distributors, wholesalers and retailers of replacement brake friction materials the right to continue selling brake friction materials manufactured prior to Jan. 1, 2014 in order to deplete current inventories. So products currently in inventory are exempted.”

Filipponio says that “all of our current brake friction products, both consumer and performance, already meet the requirements through 2020. Also, the vast majority of our products also meet the new regulations that kick-in in 2021.”

Other manufacturers, such as Wagner, Bosch and Raybestos, are equally eager to assure the industry that their offerings are on the road to full compliance with the complex regulatory changes being promulgated.

Copper, which does a great job of speeding along curing while handling the heat generated during the stopping process, became a popular brake ingredient as efforts by the Environmental Protection Agency in the 1980s effectively put an end to asbestos content because of its health hazards.

Copper consequently became a culprit when authorities determined that minute copper dust particles being dropped onto roadways were washing via rainfall into streams and rivers, creating havoc with sensitive wildlife by impacting the aquatic plant and fish food chain.

“People don’t necessarily understand the environmental impact, but it’s a real thing,” says Filipponio.

### Recipes for alternatives

“Because of its unique structure and makeup, copper has been the primary substrate used in friction materials to improve the dissipation of thermal energy, helping prevent fade as brake temperatures go up,” explains Dr. Poh Wah Lee, Centric’s director of friction materials sciences.

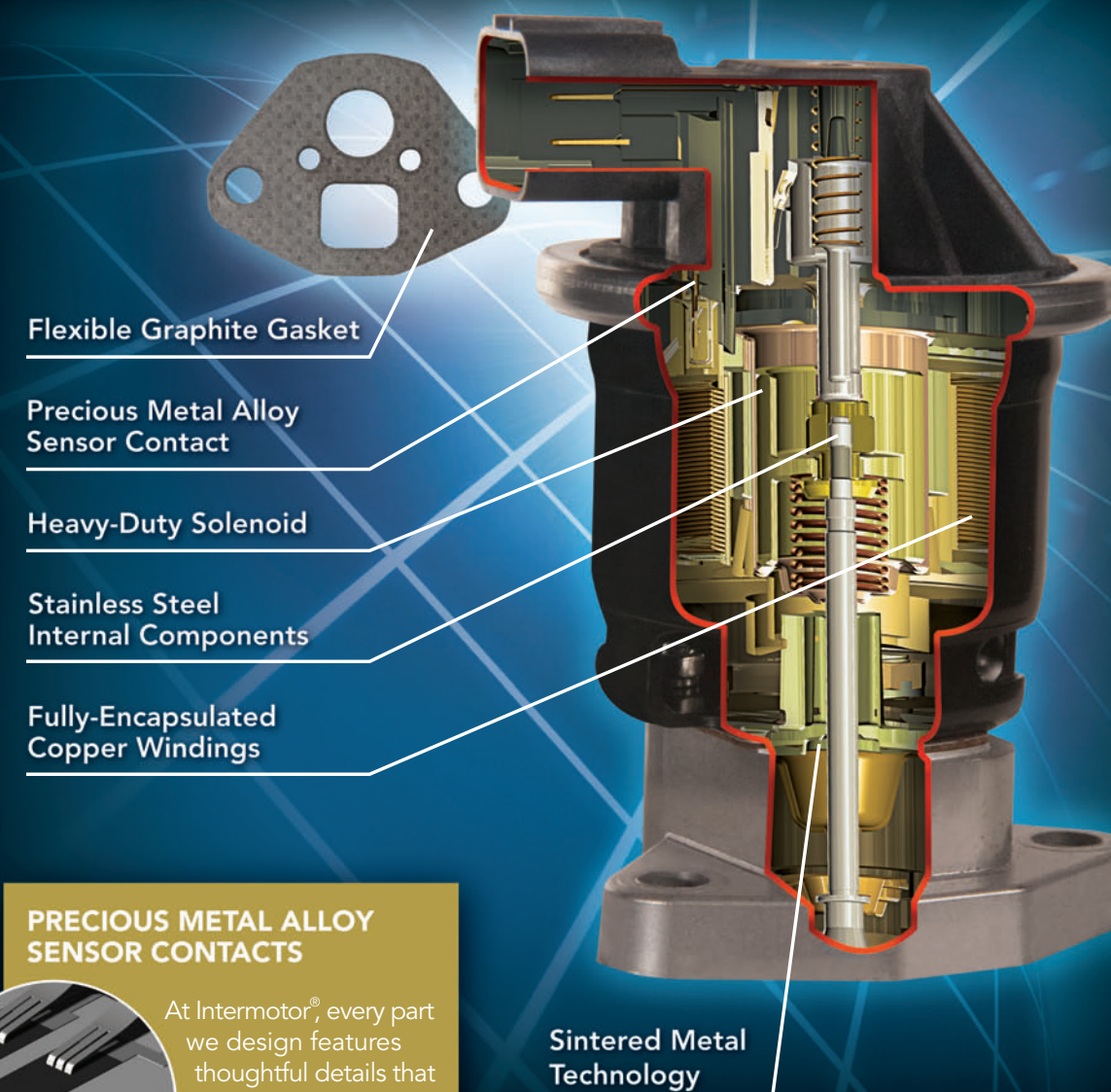
“The goal is to find a suitable replacement formulation that will improve friction performance characteristics over a wide range of driving conditions,” he adds, citing the quest for stable permeability, consistent pedal performance, ...CONTINUE READING □



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# VENDORS

## Automechanika Chicago offers manufacturers access to shops

BY KRISTA MCNAMARA  
ABRN Managing Editor

Training opportunities are booming as the first Automechanika Chicago, set for April 24-26, 2015, gets closer.

ABRN, Motor Age and Messe Frankfurt will be presenting an all-new tradeshow, featuring more than 120 training sessions over the three-day event. Automechanika Chicago is designed specifically for automotive collision repair and service shop owners, technicians, distributors, jobbers and more.

### TRENDS & MARKET Analysis

With the most extensive training under one roof, Automechanika Chicago provides techs and shop owners the best value for advanced training. The show boasts courses from top trainers in the collision industry including: Mike Anderson, Larry Montanez, Frank Terlap, Tony Passwater, Tom McGee, Akzo Nobel, VeriFacts.

In partnership with TST and ATSG, Automechanika Chicago will also feature a

vast selection of mechanical training courses, with new sponsors, trainers and classes being added daily. Among the trainers are G. Truglia, Wayne Colonna, John Thornton, Bernie Thompson, Vin Waterhouse and Greg Sands.

Registration is free and just a few simple steps away at [ABRN.com/AMCregistration](http://ABRN.com/AMCregistration).

Over 8,500 automotive aftermarket shops owners and techs are expected to attend Automechanika Chicago. As a manufacturer, put your product, service or brand in their hands by being part of this new tradeshow. Automechanika Chicago offers an extensive array of booth packages at competitive prices. Exhibitors looking to reserve their booth space can visit [ABRN.com/AMCexhibitors](http://ABRN.com/AMCexhibitors).

Chicago is the premier destination for shops, as it is centrally located within a 500-mile radius of one-fourth of the country's collision and automotive repair shops. With two international airports, Chicago is convenient with round-trip ...CONTINUE READING □

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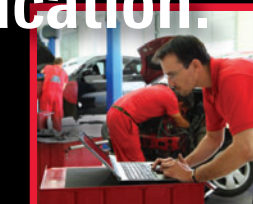
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### Chicago Fast Fact:

At the 1893 Chicago World's Fair, the first glass of Pabst Blue Ribbon was poured.



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# Taking a strategic approach TO OLDER VEHICLES

“ You need ways to tie your customers to you that have nothing to do with what they drive. ”

The average age of a vehicle licensed in the United States is approximately 11.5 years old, depending on what source you use. That means the average potential customer is driving a 2002-2003 vehicle.

According to the U.S. Department of Transportation Federal Highway Administration, the average person drives 13,476 miles per year. That means the average car is going to have 154,974 miles on the clock when it shows up at your shop.

We all know there is nothing average about the way people take care of those cars. Some cars are in very good condition at 150K and some are about to gasp their last breath. The number of vehicles in each camp is difficult to say, but there are a lot of vehicles that are not average miles or maintenance and those vehicles are probably very close to retirement.

Many of my friends who run repair shops refuse to work on vehicles older than 10 years. They feel the average car is not their

bread and butter. I see a potential issue with that way of thinking.

Recently we have had financial struggles on the entire world stage. Many people have become more conservative with money. Back in 2001 and 2002 when you could buy a car and the manufacturer would pay the interest on the loan it seemed like a \$500 neglected maintenance bill would put a six-year-old car on the road to a trade in.

Vehicle owners got themselves upside down in deals involving remaining balances on the previous car and suddenly the song they were singing on the other end of the phone was a lot different. Instead of, “It needs a 90K maintenance? I’m going to trade it.” The song sounds more like, “My 150K mile pickup needs a \$6,000 transmission? Well, I gotta do it. Have you seen what new cars cost lately?”

Projections are that a very large number of lease vehicles are about to start coming back

into the resale market toward the end of the year. This will almost certainly drive the values of used vehicles down. Is that a good thing or a bad thing? I think you could argue that both ways, depending on the place in the vehicle life cycle you work.

For repair professionals and those that support them I think it can be good, because popular models will not be selling so close to current model prices.

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**DONNY SEYFER**  
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# Making the aftermarket **A FORETHOUGHT**

Thank goodness that most dealers still don't get it. They are focused on just moving metal. Get the vehicles off the lot as soon as possible is the only goal with few exceptions.

Dealers who want a competitive edge and really want to excel in growing their business should stop thinking of aftermarket products as an afterthought. Those who partake in aftermarket sales think they have it figured out. They work with customers to get the deal done on the vehicle and then before they take them to finance and insurance, they hustle them on a detour over to the "aftermarket guy."

Yeah, now that the deal is done, they are going to ask the customer for more. The smarter dealers leave the contract fluid so that aftermarket items are included in the deal and can be financed along with the car. However, some seal the deal and then ask for out-of-pocket cash on top of the deal. Either way, the aftermarket is regarded as an add-on, an afterthought, if you will.

The aftermarket is the afterthought for one simple reason: the dealers are afraid of squirreling the deal of selling the car. They think if they bring up anything other than the vehicle price that's being negotiated, they might lose the customer. This negative thinking by dealers keeps them in check. The dealer sales formula is safe and routine, and works against aftermarket sales.

This should not come as a surprise since dealers don't think beyond the warranty period. Their hope of servicing the vehicles they sell beyond the warranty period is a false one because most people will seek out less expensive independent repair when the warranty runs out. But dealers set up this scenario from the start by not selling the customer on the dealership and the service department.

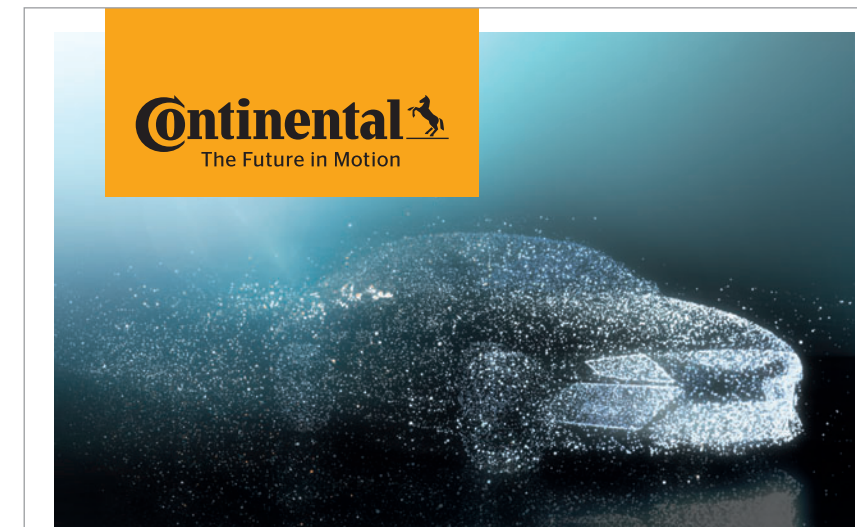
In the 40 years I have been buying cars only one dealer sold me on the dealership and service department before he tried to sell me a car. He gave me a tour of the entire dealership and the service department and introduced me to the technician who would be assigned to my car. I had my car serviced at that dealership beyond the warranty period and went back and bought another car from him a few years later. And if the owner wouldn't have retired and sold the business, there's no doubt I would still be buying cars there.

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**LARRY SILVEY**  
President, Larry Silvey  
Media LLC

“ Vehicle salespeople need training in the aftermarket offerings for the vehicles they sell. ”



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# Managing YOUR 'FRIENDS'

“ You can't be close friends with people who work for you, and never hire your friends. ”

There have been enough books written about managing people to fill a large library. Most of these talk in platitudes about effective leadership strategies or motivational techniques for team building. Each book takes a different approach but drives toward the common goal of inspirational qualities not seen since Jesus Christ was around.

That being said, regardless of your learned skills for speech giving, leading by example, or management by exception, your employees will still have a “cross to bear” regarding many things in the work place. Managing most of these types of things are impossible, but recognizing them keeps you from wasting your time or being greatly disappointed. While Facebook allows you to manage your friends, there is no real world app.

The automotive parts and service industry is challenging due to the fact 90 percent of our customers are upset that something is wrong with their vehicle or that they will have to spend money that was not part of their budget. In order to deal with the type of clientele, we must staff our businesses from top to bottom with a respective 90 percent of type-A personalities. Let's face it, if you have one sharp knife in the dishwasher, that's sort of an expected thing. But a dishwasher full of sharp

cutlery can be dangerous for the person responsible for loading and unloading, polishing and putting items away. This is the area where all you have learned about winning friends and influencing people will go awry.

Being a good person does not make you a good manager. Likewise, being a good manager will not result in you being thought of as a good person. In fact, being a good manager will almost definitely disqualify your chances of winning a popularity contest. For that reason, you must understand there is a delicate balancing act that requires tightrope skills for the manager.

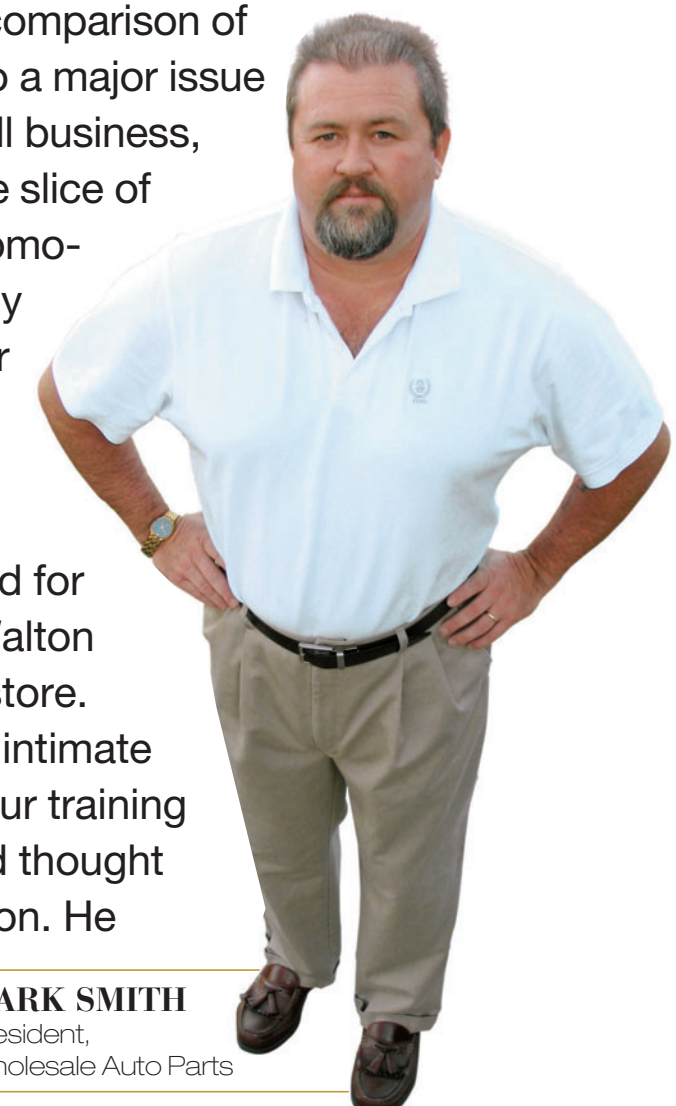
Just like any well-trained circus entertainer performing death-defying acts and miraculous feats to astound the audience, a well run parts store and service center's performance relies on people who are called upon daily to perform at their highest level to satisfy their clientele and fellow employees.

An independent owner or manager of an auto parts store or service center requires the same adherence to general policies from an operational standpoint much the same as any business, so I'm not going to preach to the choir.

Giant automotive retailers have a very similar set of policies and principals. Yet, we are vastly different, in

as much as we are alike, when it comes to managing people. The little nuances are the biggest differences, and that oxymoronic comparison of differences can lead to a major issue that affects every small business, and especially our little slice of heaven called the automotive aftermarket. Mostly due to the fact that our employees are like a family of gypsies.

A better illustration would be if you worked for Wal-Mart, and Sam Walton worked at that same store. Every day, he took an intimate personal interest in your training and development, and thought you were a great person. He bought your ...CONTINUE READING □



**MARK SMITH**  
President,  
Wholesale Auto Parts

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# NHTSA considers changes TO TIRE ID NUMBERS

“ NHTSA is in the midst of tinkering with tire identification numbers to help facilitate recalls. ”

There are a number of regulatory irons in the fire at the National Highway Traffic Safety Administration (NHTSA) in the aftermath of the General Motors ignition switch debacle, where NHTSA failed to figure out, in part because of GM obtuseness, that a recall was necessary.

So NHTSA is now interested in improving its recall process and Congress is in the process of passing a NHTSA reauthorization that will contain new recall edicts.

NHTSA isn't waiting for Congressional authorization to make some changes. The agency is in the midst of tinkering with tire identification numbers (TINs) to help facilitate recalls. The agency had opened a ruling back in 2001 to make "plain language" changes to the TIN, which helps identify who made a tire, when it was made and some other details. But NHTSA eventually decided against what at the time were considered "plain language" improvements to the TIN. In the aftermath of the GM switch recall problem, NHTSA has picked up that issue again.

The agency published a proposed rule in July containing two modifications to the current TIN numbering system. The TIN consists of up to four groups of sym-

bols. The first group, generally called the plant code, identifies the manufacturer of the tire. For new tires, this code consists of two symbols and for retreaded tires, the code consists of three symbols.

The second grouping is up to two characters and identifies the tire size. The third grouping is voluntary and may be printed by the manufacturer to provide any other significant characteristics of the tire. The fourth grouping is the date code, which identifies the week and year during which the tire was manufactured.

The first NHTSA modification would expand the plant code from two symbols to three for manufacturers of new tires. This amendment would substantially increase the number of unique combinations of characters that can be used to identify individual manufacturers of new tires. There is no question that expansion is needed.

Second, NHTSA is proposing to standardize the length of the tire identification number to eliminate confusion that could arise from the variable length of tire identification numbers. The proposed rule would standardize the length of the TIN at 13 symbols for new tires and seven symbols for retreaded tires.

Currently the TIN for new tires may vary from six sym-

bols to 12, and a retread TIN can be two to eight symbols. George P. Gillespie, Vice President, Gillespie Automotive Safety Services, says, "The agency has taken a positive step towards making TIN reading a more reader friendly and a more reliable experience for all users, thereby improving consumer responses during recalls and investigator analysis during forensics."

But not all aspects of the proposal have drawn praise. One potential problem is the proposed TIN length of 13 symbols is not in line with draft proposal of the global technical regulation for tires, says Masaki Kumamoto, Director of the Technical Department, The Japan Automobile Tire Manufacturers Association.

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STEPHEN BARLAS  
Washington  
Correspondent

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# China market trend: NEW ORDER VOLUME INCREASES

The best intelligence on trends in international markets often comes from first-hand reports – manufacturers managing operations and sales in a specific market.

That is the purpose of the Member Trends survey, conducted each quarter by the China Aftermarket Forum (CAF) of the Automotive Aftermarket Suppliers Association (AASA), the light vehicle division of the Motor & Equipment Manufacturers Association (MEMA).

The CAF Member Trends survey presents the latest information on Chinese aftermarket supplier sentiments and market trends, and the full report is only available to members and survey participants. CAF members, representatives of AASA aftermarket supplier members responsible for their company's operations in China, gain information on business conditions and market trends.

Highlights of the third quarter 2014 CAF Member Trends survey indicated new order volume increased from 2013. OE service (OES) was the strongest of the three segments (OES, aftermarket and heavy duty), reporting a healthy, double-digit year-over-year increase

for respondents (independent and commercial vehicle sales also are reported). Hiring continued to remain strong as suppliers steadily ramp up to address growth.

While quarter-to-quarter changes sometimes reflect the seasonality of the markets, double-digit growth is the norm. The Member Trends survey serves as a valuable tool to gauge changes in aftermarket growth trends.

In addition to historical questions, a unique topic is explored each quarter. This quarter focused on “Branding in the Chinese Aftermarket.” OE and OES brands command the highest recognition and influence in the China market; however, respondents commented that the threat from domestic competition has increased from the previous year. CAF members continue to work to address counterfeiting, still a major issue in this market.



Hiring continued to remain strong as suppliers steadily ramp up to address growth.



For more information about AASA and its global outreach services, visit [www.aftermarketsuppliers.org](http://www.aftermarketsuppliers.org) or email [cdraper@aasa.mema.org](mailto:cdraper@aasa.mema.org).

*Editor's note: Curtis Draper is the vice president of industry analysis, programs and member services at AASA and executive director of AASA's international aftermarket councils: the CAF and the Overseas Automotive Council (OAC).*

*The CAF is a consortium of full-service suppliers that meet on a quarterly basis to discuss opportunities within the Chinese aftermarket and to identify ways to address challenges in the growing segment. For more details about CAF programs and initiatives, [click here](#).*

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**CURTIS DRAPER**  
Vice President, Industry Analysis,  
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# INCREMENTAL CHANGE

SHOP OWNERS, TECHS MORE OPEN TO BUYING PARTS ONLINE

BY BRUCE ADAMS | Managing Editor

The percentage of auto repair shop owners and technicians who purchase parts online increased in 2014 from 2013, according to the *Aftermarket Business World* Online Purchasing Habits studies conducted during the two years.

The number of respondents who said they purchase online parts all the time jumped from 3 percent in the 2013 study to 8 percent in 2014. The number of respondents who said they never purchase online dropped from 46 percent in 2013 to 39 percent in 2014. Those who purchase parts online zero to 10 percent of the time remained steady at 30 percent.

Those who use either a smart phone or a tablet for their work increased from 55 percent in 2013 to 56 percent in 2014. Those who said they would not use an app to purchase parts online dropped from 74 percent in 2013 to 71 percent in 2014.

When asked how they find online retailers and websites, more respondents appear to be using electronic

bookmarks as those saying that they go to the websites of normally used retailers increased from 27 percent in 2013 to 35 percent in 2014.

Those who said they conduct online searches to find retailers dropped from 38 percent in 2013 to 32 percent in 2014.

Some 19 percent of respondents said they are buying more online parts in 2014 than in 2013, while 66 percent said they are buying about the same number online.

Those who buy parts online say they do so because it's easy to compare prices (23 percent), due to convenience (20 percent) and to check for product availability (15 percent).

They dislike most the potential to order the wrong part (27 percent) and paying shipping costs (23 percent).

Methodology: The *Aftermarket Business World* Online Purchasing Habits Study was fielded to readers of *Motor Age* via email. Results are intended to show general market trends, not statistical certainties.

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# Auxiliary Lighting

## Frequency of online auxiliary lighting purchases

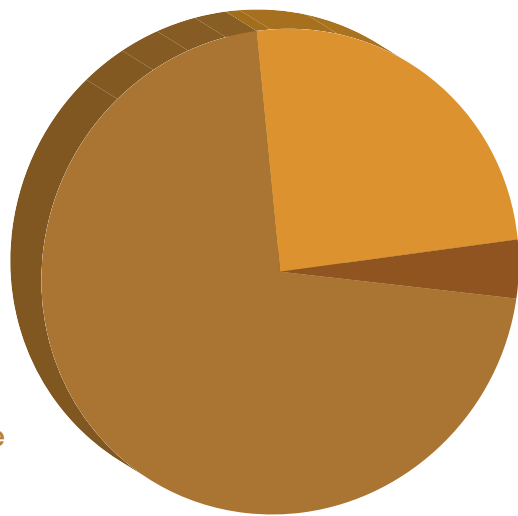
0-10% of the time	42%
11-25% of the time	12%
26-50% of the time	1%
51-75% of the time	1%
All the time	1%
Never	43%

## App usage for online buying

**25%**  
Would consider using

**4%**  
Already use

**71%**  
Would not use



**40%** find online retailers through an online search when looking to purchase auxiliary lighting online.

# INCREMENTAL CHANGE

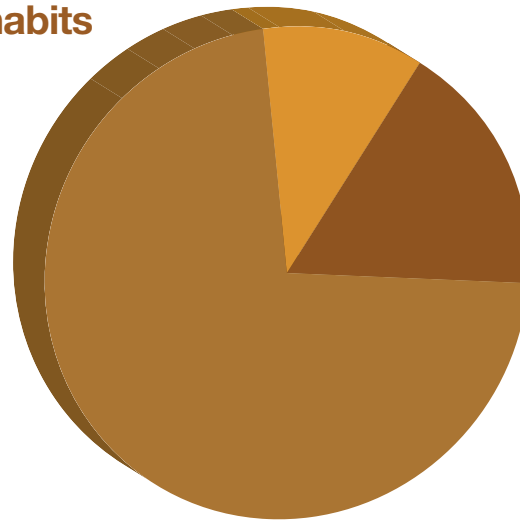
**31%** of respondents say they dislike most the potential to order the wrong part when purchasing auxiliary lighting online.

## 2014 vs. 2013 online buying habits

**11%**  
Purchased more

**17%**  
Purchased the same

**72%**  
Purchased less



## Reasons for buying auxiliary lighting online

Ease of price comparing	28%
Convenience	16%
Product availability	14%
To avoid salespeople	4%

## Importance of online product reviews

Very important	20%
Important	25%
Somewhat important	26%
Not important at all	29%

**59%**  
reported they

## WOULD NOT BE ENTICED

by online coupons, rebates, QR codes or other incentives to purchase more auxiliary lighting online.

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# Battery Chargers

## Frequency of online battery charger purchases

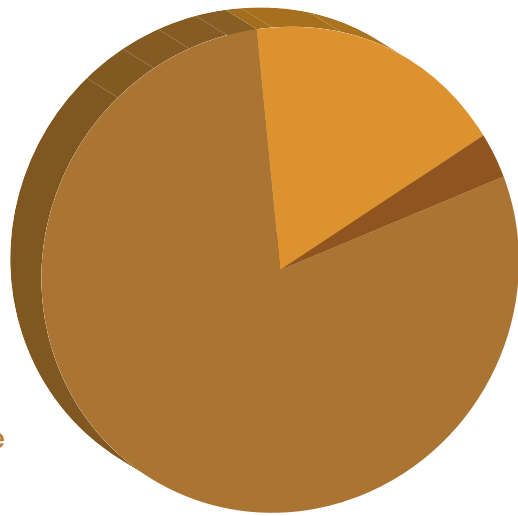
0-10% of the time	29%
11-25% of the time	4%
26-50% of the time	1%
51-99% of the time	3%
All the time	4%
Never	59%

## App usage for online buying

**18%**  
Would consider using

**3%**  
Already use

**79%**  
Would not use



**38%** find online retailers through an online search when looking to purchase battery chargers online.

# INCREMENTAL CHANGE

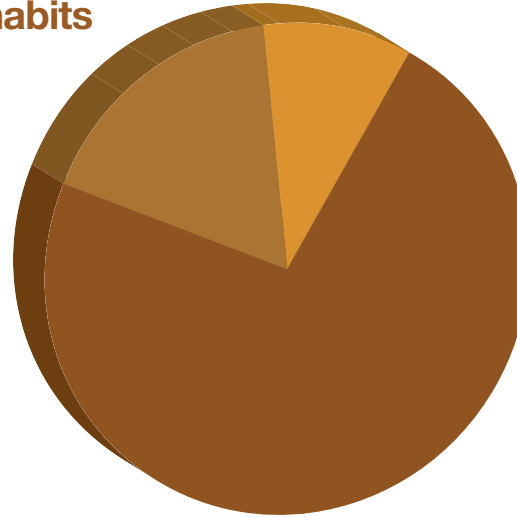
**37%** of respondents say they dislike most the shipping costs when purchasing battery chargers online.

## 2014 vs. 2013 online buying habits

**10%**  
Purchased more

**73%**  
Purchased the same

**17%**  
Purchased less



## Reasons for buying battery chargers online

Ease of price comparing	19%
Convenience	15%
Product availability	13%
Speed	5%

## Importance of online product reviews

Very important	23%
Important	23%
Somewhat important	31%
Not important at all	23%

**58%**  
reported they

## WOULD NOT BE ENTICED

by online coupons, rebates, QR codes or other incentives to purchase more battery chargers online.

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# Chassis

## Frequency of online chassis parts purchases

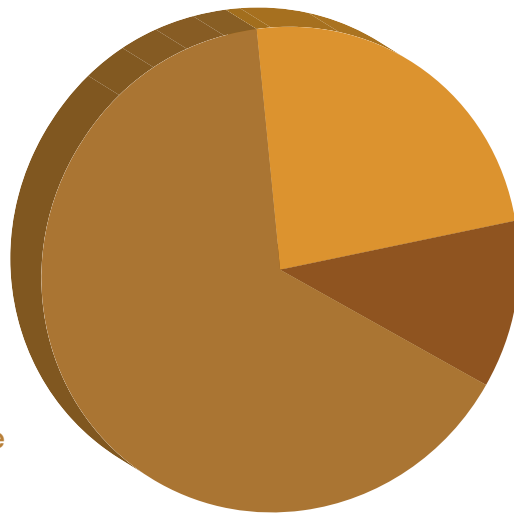
0-10% of the time	33%
11-25% of the time	9%
26-50% of the time	11%
51-99% of the time	11%
All the time	11%
Never	25%

## App usage for online buying

**24%**  
Would consider using

**11%**  
Already use

**65%**  
Would not use



**39%** find online retailers through an online search when looking to purchase chassis parts online.

# INCREMENTAL CHANGE

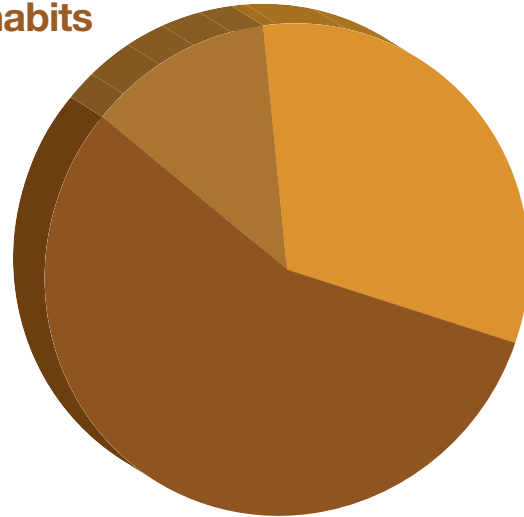
**36%** of respondents say they dislike most the potential to order the wrong part when purchasing chassis parts online.

## 2014 vs. 2013 online buying habits

**32%**  
Purchased more

**56%**  
Purchased the same

**12%**  
Purchased less



## Reasons for buying chassis parts online

Ease of price comparing	20%
Convenience	24%
Product availability	22%
Speed	6%

## Importance of online product reviews

Very important	20%
Important	24%
Somewhat important	25%
Not important at all	31%

**50%**  
reported they

## WOULD NOT BE ENTICED

by online coupons, rebates, QR codes or other incentives to purchase more chassis parts online.

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# Shocks & Struts

## Frequency of online shocks & struts purchases

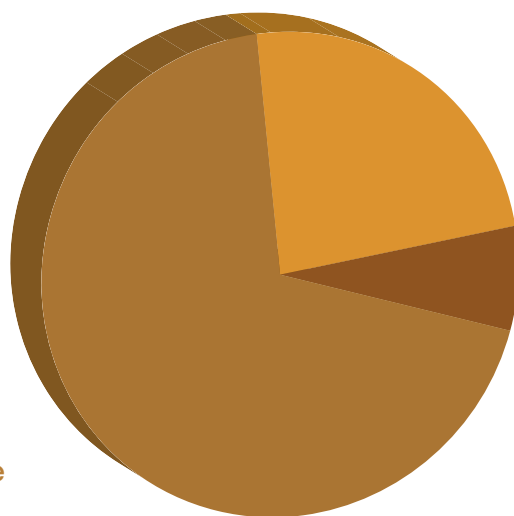
0-10% of the time	24%
11-25% of the time	8%
26-75% of the time	14%
76-99% of the time	14%
All the time	16%
Never	24%

## App usage for online buying

**24%**  
Would consider using

**7%**  
Already use

**69%**  
Would not use



**55%** find online retailers by going to the website they normally use when looking to purchase shocks & struts online.

# INCREMENTAL CHANGE

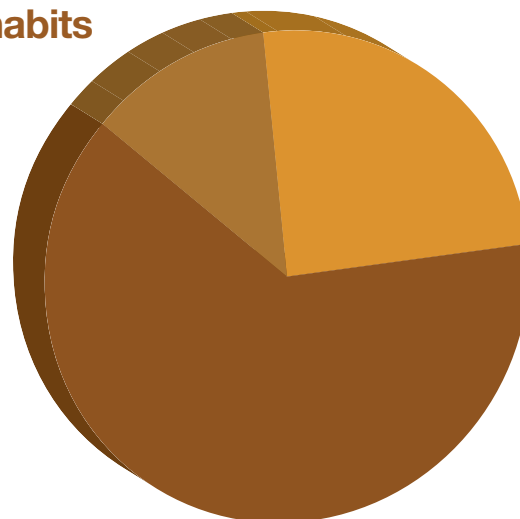
**28%** of respondents say they dislike most the potential to order the wrong part when purchasing shocks & struts online.

## 2014 vs. 2013 online buying habits

**25%**  
Purchased more

**63%**  
Purchased the same

**12%**  
Purchased less



## Reasons for buying shocks & struts online

Ease of price comparing	29%
Convenience	24%
Product availability	11%
Speed	11%

## Importance of online product reviews

Very important	13%
Important	22%
Somewhat important	21%
Not important at all	44%

**55%**  
reported they

## WOULD NOT BE ENTICED

by online coupons, rebates, QR codes or other incentives to purchase more shocks & struts online.

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# Water Pumps

## Frequency of online water pump purchases

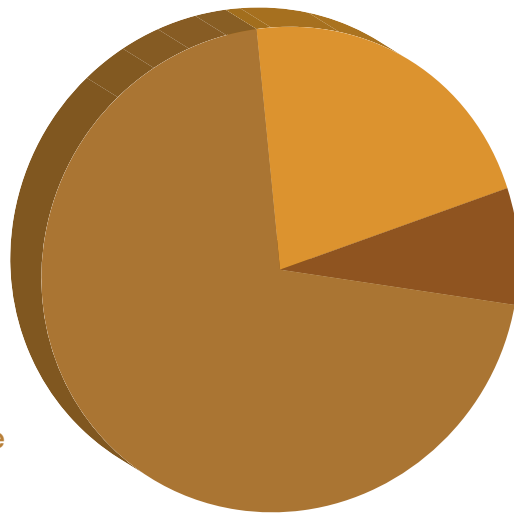
0-10% of the time	23%
11-25% of the time	7%
26-75% of the time	7%
76-99% of the time	9%
All the time	10%
Never	44%

## App usage for online buying

**22%**  
Would consider using

**8%**  
Already use

**71%**  
Would not use



**40%** find online retailers by going to the website they normally use when looking to purchase water pumps online.

# INCREMENTAL CHANGE

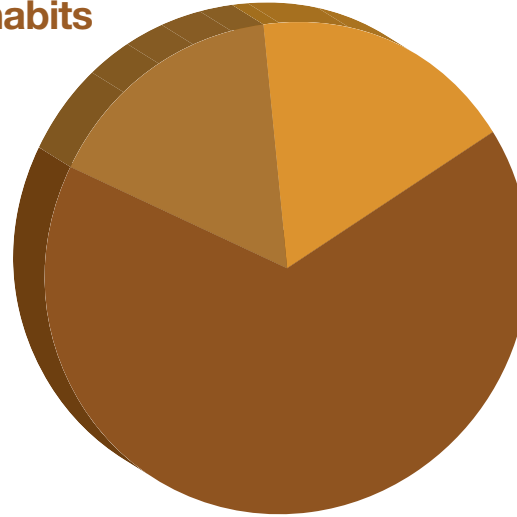
**28%** of respondents say they dislike most the potential to order the wrong part when purchasing water pumps online.

## 2014 vs. 2013 online buying habits

**18%**  
Purchased more

**66%**  
Purchased the same

**16%**  
Purchased less



## Reasons for buying water pumps online

Ease of price comparing	16%
Convenience	22%
Product availability	17%
Speed	7%

## Importance of online product reviews

Very important	22%
Important	19%
Somewhat important	22%
Not important at all	37%

**58%**  
reported they

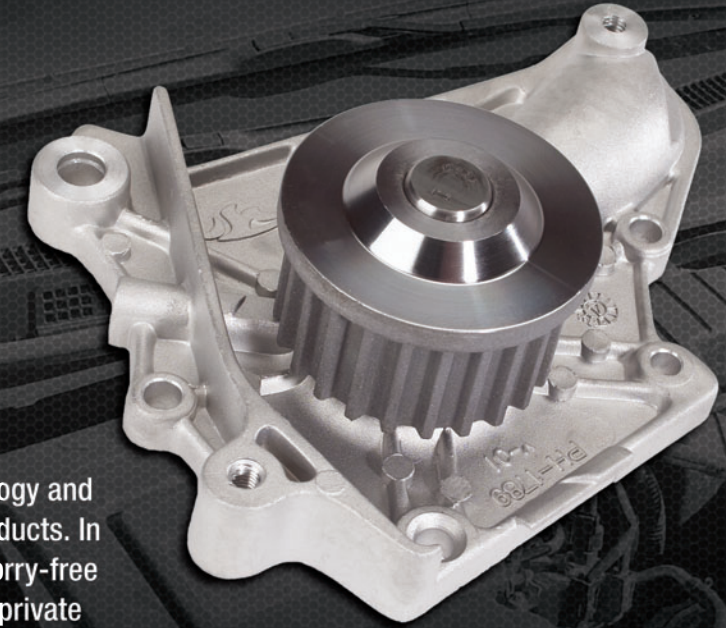
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by online coupons, rebates, QR codes or other incentives to purchase more water pumps online.

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