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TELEMATICS ON THE RISE

AFTERMARKET MUST FORM A PLAN TO SHARE IN BENEFITS

BY BRIAN ALBRIGHT | Correspondent

The use of automotive telematics is growing rapidly, and companies in the aftermarket need to prepare strategies to capitalize on the technology.

Last year, the Automotive Aftermarket Suppliers Association (AASA) released the results of its “Hot Topics” survey on telematics, which found that while 61 percent of respondents felt that telematics would have a positive impact on their business in the aftermarket,

many of them expect to see a loss of market share for independent service providers as dealerships leverage these capabilities.

Research firm Berg Insight estimates that nearly 12 percent of all cars sold worldwide in 2013 were equipped with an OEM embedded telematics system. The attach rate for these

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Analysis by market

REPLACEMENT

Vendors: Car exhibit for kids plants the seed to sprout future auto technicians.

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Vehicle Systems Research: Independent research takes a closer look at auxiliary lighting, fuel pumps and water pumps.

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OBD-II: Global aftermarket research group forecasts a \$1 billion opportunity for on-board diagnostic (OBD-II) telematics devices and services.

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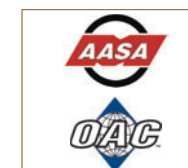
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Telematics on the rise



Third-party providers need an open, standardized platform for telematics communication.



systems in North America is currently around 30 percent. The embedded market is expected to grow 30.6 percent annually, with shipments reaching 54.5 million in 2020, and the number of subscribers reaching 158.9 million. While most of those users will only access basic safety services, the number of users accessing at least one additional telematics service will grow to roughly 112 million worldwide.

Cloud computing technology and more advanced sensors have helped enable this growth. “We now have the ability to monitor what’s going on in the vehicle in real time, so that you can understand what’s happening with a particular vehicle in relation to its environment and in relation to the driver behind the wheel,” says Jeff Nedwick, Infor’s director of automotive industry strategy. “Cloud computing has been a huge technology enabler, because you need some place to run the high-end analytics that this makes possible.”

Embracing telematics will be important for companies in the aftermarket, but exactly what the business model will be is still not clear.

There is an emerging market for telematics

in cars that don’t currently have an embedded system. “There are lots of vehicles on the road with nothing in them as far as telematics, and that’s the aftermarket channel we’re focused on,” says Malcolm Sissmore, North American sales director for telematics at Delphi. “We believe we can deliver a program through service centers to fleets and consumers, and in conjunction with parts distributors.”

According to Nedwick, most telematics systems receive three kinds of data: business-as-usual information that the vehicle is performing as expected; information about air bag deployments or anti-lock braking systems engaging that should be acted upon immediately; and what he describes as “a whole bunch of data in the middle that is of even more interest to the broader market, and that’s where aftermarket capabilities are important,” he says.

That data can be used to monitor product performance, identify and fix defects, or to develop new product offerings. “You could even use the location information and data from



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Telematics on the rise

the gas tank to set up a partnership to resell the data to third parties like gas stations or restaurants,” Nedwick says. “Those are the kinds of thing that are possible now.”

Connecting with customers

In the AASA survey, the majority of respondents felt that telematics would have a positive impact on the industry, but more than a quarter thought there would be a negative impact. This likely stems from fears that OEM dealerships will have an unfair advantage when it comes to drawing customers in for routine maintenance and other repairs.

Whoever is able to connect best with customers will be able to open up a dialogue that results in less deferred maintenance and a stronger connection between the vehicle owner and the repairer.

“The idea is that with more knowledge, the end consumer would be more informed about what is going on with their car, and they will be more apt to go to the dealership or service center, or to an independent shop with that connectivity,” says Bailey Overman, senior analyst at the AASA. “You create touchpoints to educate consumers about the care of their vehicles.”

Right now, OEMs and their dealer networks have exclusive access to this data in the case of vehicles sold with onboard telematics. A full

60 percent of respondents to the AASA survey expect a market share decline of approximately 3 percent for the independent aftermarket as the result of telematics adoption.

Whoever has the data, the future of telematics lies in the ability to apply better analytics to the more granular data being generated by the increasing number of sensors in the vehicle.

Infor is one of the companies working on the challenge of how companies can use that telematics data. “Just having a place to put the data isn’t enough,” says Ziad Nejmeldien, Infor’s senior vice president and chief scientist of the company’s Dynamic Science Labs. “You need an analysis group to executive the analytics work to make sense of that data that is being cheaply stored.”

Aftermarket efforts have so far focused on getting consumers to adopt plug-in solutions. For a consumer model to emerge, there has to be value beyond diagnostics and maintenance. “We’re seeing traction for folks who want to monitor a teen driver or a senior driver, but those are limited audiences,” Sissmore says. “The value creation isn’t there yet from the vehicle maintenance/diagnostic-only perspective.”

Lowering the cost of these solutions will be critical for success with consumers, along with ...CONTINUE READING □

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VENDORS

U.S. Export-Import Bank prods American aftermarket to go global

BY JAMES E. GUYETTE
News Correspondent

Officials at a government agency that assists American businesses in landing overseas sales contracts are hoping that federal lawmakers cast their votes in favor of maintaining the U.S. Export-Import Bank's charter prior to its June 30 expiration deadline.

TRENDS & MARKET Analysis

Formally designated as the Export-Import Bank of the United States and commonly called Ex-Im, political opponents ranging from conservatives to union leaders contend that the program is a boondoggle benefiting mostly huge conglomerates with questionable needs for taxpayer largess. However, 89 percent of its record-high 3,413 transactions in 2013 were for small businesses – and the department turns a profit. In October, it disbursed \$675 million to the U.S. Treasury, reflecting a 47-percent growth pattern since 2009.

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FRED P. HOCHBERG

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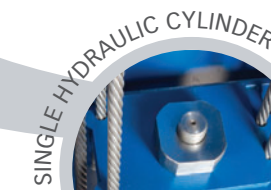
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Automotive enterprises, especially entrepreneurs in the aftermarket, have certainly benefited from the offerings as over the past five years Ex-Im has directed nearly \$2 billion to help facilitate exports of domestically produced

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Ex-Im staffers review domestic sellers and overseas buyers to verify credit worthiness.



completed cars and trucks along with parts, chemicals, services and equipment to international markets.

“These numbers are another clear demonstration that the global demand for products stamped ‘Made in America’ continues to grow,” declares Chairman and President Fred P. Hochberg.

“I look forward to working with Congress on the passage of a long-term reauthorization of the Export-Import Bank in order to bring certainty to the hundreds of thousands of Americans whose jobs depend on a level playing field for U.S. goods and services,” he says.

“Quality American goods shouldn’t lose out to aggressive foreign competitors because of the Export-Import Bank’s still-uncertain future,” says Hochberg. “Overwhelmingly bipartisan majorities in Congress have extended our charter 16 times, and I’m confident that together we can again find a long-term solution. Small businesses and workers in communities across America are counting on it.”

A variety of financing mechanisms, including working-capital guarantees, export credit

insurance and financing to help foreign buyers purchase U.S. goods and services are provided. Regional Ex-Im offices are spread throughout the nation, offering business owners referrals to participating private-sector brokers and bankers.

Ex-Im’s upcoming April 23-24, 2015, Annual Conference at the Omni Shoreham Hotel in Washington, D.C. “presents a unique opportunity for companies from around the world to meet U.S. exporters,” says Hochberg. “Attendees include more than 1,100 exporters and representatives of financial institutions, foreign trade partners and government officials. At the event participants also meet Ex-Im Bank staff and obtain detailed information about our export credit products and programs,” he reports.

Wheeling and dealing

“By selling Made-in-America goods and services internationally, U.S. business can grow faster, hire more employees, pay higher wages ...CONTINUE READING □



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VENDORS

Car exhibit for kids plants the seed to sprout future auto technicians

BY JAMES E. GUYETTE
News Correspondent

Designed to pique the imagination while giving youngsters a hands-on peek at what it feels like to work on a car, a special Children's Exhibit unveiled at AAPEX proved to be a big hit with kids – and adults – of all ages.

Rich White, senior vice president of the Auto Care Association, who had seen a similar installation at the Betty Brinn Children's Museum in Milwaukee, came up with the idea. "I went up there and thought, 'This would be perfect!' I watched the kids playing and talked to the parents standing there," he recounts.

TRENDS & MARKET Analysis

"We've had this idea for a number of years that this would be a fun project for the Car Care Council; part of our role is educating consumers, and this fits right in," says White.

"It will plant the seed in kids' minds" that

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Q&A

JEFF HAMMOCK
Founder and CEO,
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A What did Hammock say? Continue reading online.

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learning about auto repair may be a career route to pursue when they get older, with their fertile imaginations also influencing Mom and Dad regarding the importance of preventative maintenance and the other benefits associated with being Car Care Aware.



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You can customize the exhibit with brand names on the parts and equipment.



“Children aren’t going to go to a museum without their parents standing there watching,” White says. “Little Johnny or Betty will go home and say, ‘Can we do this to our car?’”

With AAPEX packed up and shipped out of Las Vegas until next year, the plan is to have the showcase’s concept continue as a permanent attraction at another site.

“It will eventually be donated to a children’s museum somewhere in the country. It will live on for a long time and be visited every day. Thousands and thousands of children will see it, and thousands and thousands of parents will see it.”

White invites aftermarket businesses to either sponsor or purchase a display of their own. “There are versions that can be fabricated and taken on tour. This one was designed to find a home in a children’s museum,” he says.

“You can customize and brand the exhibit with brand names on the parts and equipment, and there are a variety of signage opportunities. It’s a pretty inexpensive endeavor that will last for years and years in a community where you have a business or are headquartered.”

Tykes become techs

AutoZone, for example, has been involved with the Children’s Museum of Memphis in its hometown since the institution’s inception in 1990. Tykes become techs in a scaled-down work environment. “The AutoZone Garage is a favorite with children and adults,” according to Carrie Roberts, the museum’s director of public relations and marketing.

“Children gravitate to the minivan, where they pretend to drive and learn about child passenger safety. They also build a car, change a tire and take a virtual driving tour of Memphis. Kids see how a drivetrain works, how brakes make a vehicle stop, and how an engine cranks and works,” she reports. “Children decide what makes a car ‘happy’ or ‘sad.’ Parents also learn about proper installation of child passenger safety seats.”

And although the AutoZone Garage appears to be slightly bested by the pint-sized jet airliner and genuine climb-aboard fire truck, the car creation does draw a whole string of rave reviews. ...CONTINUE READING □

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DEALERSHIPS

New Jersey dealer group goes green

Gentilini Motors has made its dealerships more energy efficient

BY BRIAN ALBRIGHT
Correspondent

Gentilini Motors, a Woodbine, N.J.-based group of dealerships, has taken steps to reduce its energy and water consumption as part of a company-wide “green” initiative that encompasses service, sales and the company’s physical facilities.

TRENDS & MARKET Analysis

The company has installed a large solar array at its Ford dealership, and built a new Chevrolet store across the highway that was designed with environmentally friendly features from the ground up.

“The solar array was a tremendous project and cut our energy usage pretty much in half,” says Paul Gentilini, dealer-in-principal at Gentilini Family Ford. “We can operate off that solar power, which reduces strain on the electricity coming from the township.”

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Q&A

DAVID ZUBY
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How far away are we from having fully autonomous vehicles from OEMs? What is a “smart car”?



What did Zuby say? Continue reading online.

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The 25,000-square-foot Chevrolet store, which opened in May, includes a specialized LED lighting system that is more energy efficient, and a control system that turns the lights on and off automatically. The bathrooms feature waterless urinals as well, which cuts



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-Jack Roush
Chairman, Roush Enterprises

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DEALERSHIPS

“ In the case of the dealership’s solar array, the tax credits went to Ford. ”

water consumption. The new dealership also includes a larger waiting area, indoor delivery garage, heated drive-up service reception, and provides free four-point inspections.

“We know how much a large business like ours affects the environment,” Gentilini says. “We have more than 100 employees, we’re open late, and using traditional methods of energy and water management would put a strain on resources.”

Gentilini is one of the number of dealerships across the country that are taking advantage of lower costs and incentive programs to make their buildings more energy efficient. These projects range from solar panels to LED lights that can cut energy consumption by 50 percent or more.

Bella Automotive Group, for example, built a “green” Honda dealership near Clermont, Fla., that features a “living roof” partly covered in vegetation, solar panels, water-efficient landscaping, and intelligent lighting. Water harvesting has reduced the dealership’s demand for municipal water by 30 percent, and the company uses recycled water for car washes.

Sonic Automotive recently opened EchoPark Automotive, the first of an expected-six-location chain of pre-owned dealerships, with a Leadership in Energy and Environmental Design (LEED) certification. Wellesley Toyota was the first LEED-certified dealership in New England, and boasts features such as reflective roof materials, high-efficiency low-flush toilets and faucets (which reduced water consumption by 30 percent), low-water landscaping features, waste oil recycling, a smart energy management system to control the HVAC system, and LED lighting. In addition, 55 percent of the previous dealership building’s walls, floors, and roof were re-used for the new facility.

According to the Environmental Protection Agency, just cutting energy consumption by 10 percent across the dealer population could save \$193 million in energy costs and prevent more than one million tons of CO2 emissions annually. That’s because dealerships consumer more energy than almost any other type of ...CONTINUE READING □

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TECHNOLOGY SOLUTIONS

Aftermarket e-tailing market to double by 2018, study says

BY BRIAN ALBRIGHT
Correspondent

E-tailing is the fastest growing retail sector in the automotive aftermarket, and is poised to become a significant revenue generator in the auto parts market. The Auto Care Association has released what it is touting as the most comprehensive study of e-tailing in the automotive aftermarket ever conducted. The message for suppliers and retailers: be prepared for online sales growth or get left behind.

TRENDS & MARKET Analysis

The study indicates that the e-tailing market will double in size by 2018, growing at roughly five times the current projected total aftermarket growth rate of 3.5 percent.

“That represents a significant shift in purchasing behavior by both consumers and professional installers,” says Behzad Rassuli, vice president of market intelligence at the Auto Care Association.

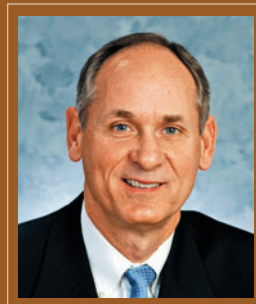
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Q&A

MIKE MARIS

Senior Director of Transportation and Logistics, Motorola Solutions



What are some common mistakes companies make when it comes to scanning applications in the warehouse?



What did Maris say? Continue reading online.

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The report, “E-Tailing in the Automotive Aftermarket,” provides market size and growth data, repair shop/installer survey results, and consumer/vehicle owner survey results. It covers the purchase of parts by consumers and



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“ Professional technicians make up the largest portion of the online purchasing sector. ”

professional installers using publicly available websites (not business-to-business e-commerce sites). The study also excluded online tire sales. The Auto Care Association worked in conjunction with IMR Inc. and The Martec Group to conduct the research.

“Very little solid data existed on the size and makeup of the e-tailing channel, until now,” says Kathleen Schmatz, president and CEO, Auto Care Association. “This first-of-its-kind study, produced by the market intelligence team of committee volunteers and staff, provides unprecedented insight into e-tailing purchase behaviors across multiple industry sectors, and the impact of these trends on the entire auto care industry.”

E-tailing now represents about 6 percent of the total aftermarket. “When you look at the growth projections we have in our study, the e-tailing segment will double in the next five years, and double again after that,” Rassuli says. “And these are very conservative estimates that don’t consider any advancements in technology or increased purchasing behavior by millennials.”

This will mark a major channel shift, so if organizations are not prepared to adapt, they could see their businesses suffer. “The same thing will happen that happened in the book and video rental space,” Rassuli says. “It’s a dramatic trend.”

Installers turn to online sales

In terms of dollars spent on replacement parts online, three categories represented half of the dollar volume in 2013: braking systems (pads and shoes); ignition and engine (fuel pumps, alternators, ignition coils, etc.); and glass, mirrors and lamps.

The biggest surprise in the data, at least in terms of contradicting conventional wisdom, was that professional technicians make up the largest portion of the online purchasing sector.

“More than half of the market is professional installers going outside of their B2B systems and ordering parts off of public sites,” Rassuli says. “Often this starts because they are researching parts and looking for better prices, ...CONTINUE READING □



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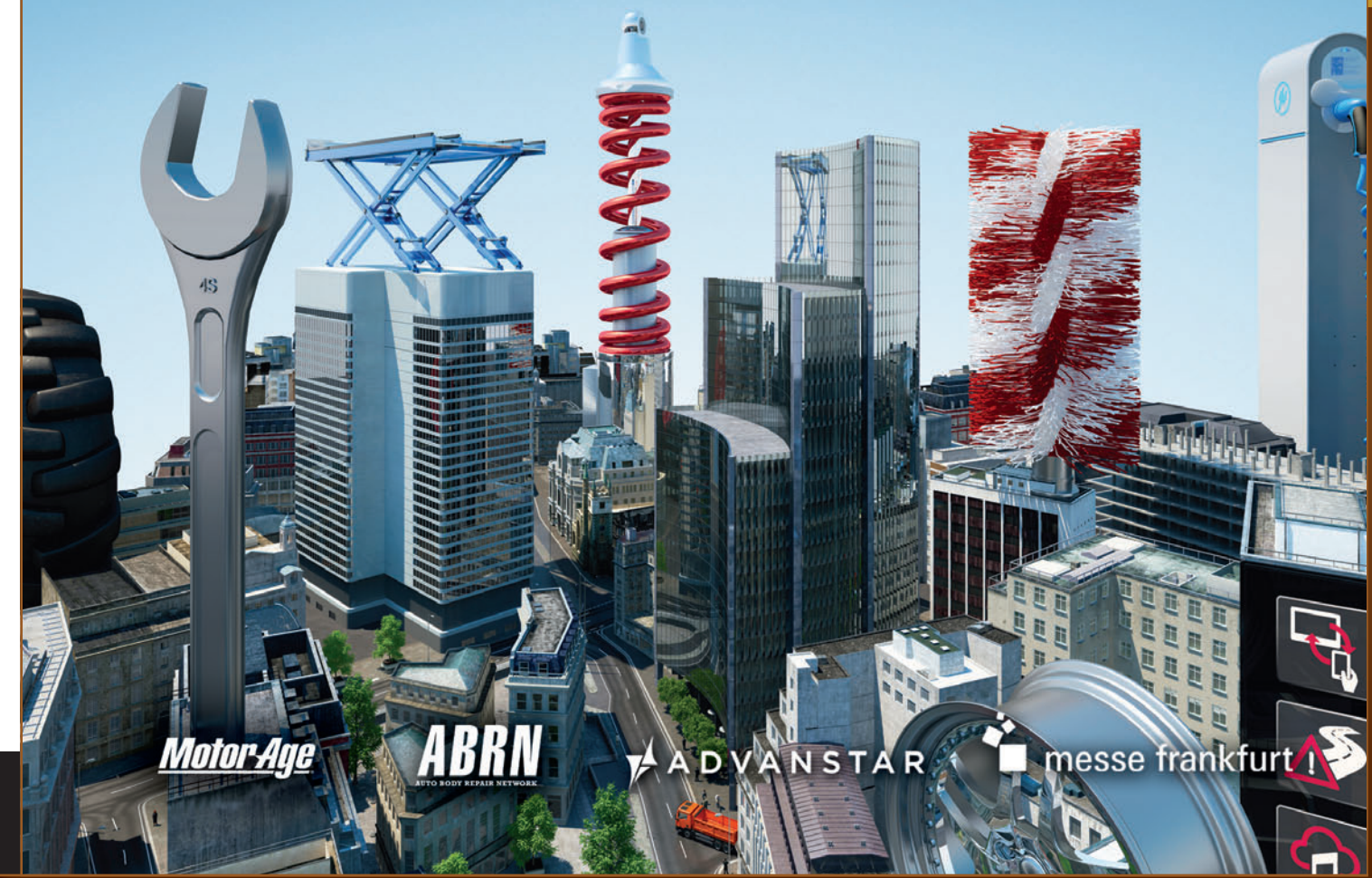
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Take your brain off **AUTOPILOT**

Sometimes you have to get off the highway and take a road that is not the straightest line to where you are going. I recently completed a week-long trip to New England to teach with Technicians Service Training.

With a different town every night and a lot of driving, it becomes easy to do what the GPS tells you and miss all of the things surrounding you.

If you have traveled through New England then you know that the roads wind all over and often have a surprise at every turn. You can run into a gorgeous 18th century home and half mile later come upon a picturesque lake. Despite all the beautiful fall foliage along the highway you will not really see anything unless you go off GPS and get lost. I made the decision to do just that in Danbury Conn., and discovered a town founded in 1698 that's modern and historic at the same



time. A short trek around the streets gave me the idea for this column.

A beautiful church (see photo) in downtown Danbury was a happy reward for taking the more twisted path.

As many of you know I am a devout follower of the lean methods of streamlining processes. By design, I am always looking for the straight line between two points or the unnecessary step so that I can get more done in less time. While that is very effective once the process is designed, it occurs to me that while predictability is a great thing to have in business all of us need some happy surprises to spawn the creativity that makes us better at what we do. The problem is that we may have to schedule those opportunities.

For those of us who repair cars I think you will relate when I say that often some of the best lessons in my craft come from the least

expected place. Many times someone will tell me a story about a problem they had with a car that could not be fixed and I have to go and get the story by researching the problem.

Like that dog in the movie "Up" I have a tendency to be distracted by squirrels so I have to give myself permission to go down a path for a time and then get back to what I am supposed to be doing.

I wonder how many things we could learn if we took those five minute "down times" and learned something new rather than burying our face in a ...CONTINUE READING ▣



DONNY SEYFER
Operations Manager
Seyfer Automotive, Inc.



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'Green' cars causing aftermarket OPPORTUNITY TO GROW

When it comes to the mass adoption of electric vehicles, it seems history is repeating itself. Recently, I came across this line while doing some research: "The popularity of the electric car was hampered by a lack of battery-charging infrastructure." While electric-vehicle infrastructure remains a challenge today, this is not a recent quote. It is not from the early 1990s, when General Motors tried to launch the EV1. This line was used in an article on Britannica.com to describe the state of electric vehicles in 1910.

Since we still haven't solved the electric-vehicle infrastructure issue in more than 100 years, it's no small wonder that electric vehicles account for just more than 2 percent of all alternative powertrain vehicles on the road today. Gas-electric hybrids, on the other hand, account for nearly 98 percent of all alternative-powertrain vehicles.

There are, however, positive signs of growth for both electric vehicles and hybrids. According to our recent analysis, electric vehicles grew their sales by 245 percent in 2013, while hybrids grew by 19 percent. For electric vehicles, growth was spurred primarily by the Nissan Leaf and the Tesla Model S, which are currently the top-two selling all-electric vehicles on the market. For hybrids, the Toyota Prius remains an immensely popular

vehicle and is the top selling hybrid today. Other top-five hybrid models include the Toyota Camry, Honda Civic, Toyota Highlander and Ford Fusion.

In addition to infrastructure, one of the biggest hurdles for electric vehicles is affordability. The average amount borrowed to purchase a new electric vehicle in 2013 was \$28,838. The average monthly payment was \$549. In contrast, the average loan for all new vehicles in the fourth quarter of 2013 was \$27,430, with an average payment of \$471.

Given that the average monthly payment for an electric vehicle is 16.6 percent higher than the average vehicle, it makes sense that the typical electric vehicle customer is affluent. In 2013, 21 percent of electric-vehicle customers had incomes of more than \$175,000. Hybrid customers also are affluent, but not at the same level as electric-vehicle customers. Just 12 percent of hybrid owners have incomes of more than \$175,000.

One trend bodes well for electric vehicles. Their owners tend to be relatively young in comparison to hybrid owners. More than 45 percent of hybrid owners are 55 years old or older, compared to just 26 percent of EV owners who are 55 year old and older. More than half (55 percent) of all electric vehicle customers are

Electric vehicles account for about 2 percent of all alternative powertrain vehicles today.

between the ages of 36 and 54. This demographic group will be purchasing vehicles for the next 20 to 30 years. With so many supporters in this age group, there certainly are possibilities for more electric vehicle sales, especially since many of these customers should hit their peak earning years during the next decade.

What does it all mean for the automotive aftermarket? It is highly likely that alternative-powertrain vehicles will continue to gain market share in the coming years. In the foreseeable future, gas-powered vehicles obviously will hold market share. But, if gas prices stay high and electric vehicle infrastructure improves, there is no reason why the aftermarket won't be doing robust business with alternative powertrains in the decades to come. □



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Senior Director,
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Are your customers AUTOMOTIVE CONNOISSEURS?

We live and work in an area where there are a lot of tourist attractions, and therefore a lot of tourists. Rafting, boating, fishing, hiking, rock climbing, bungee jumping, base jumping, skiing, hunting, camping and sightseeing from multiple mountain vistas. Many of these attractions, while worthwhile, are just part of the normal routine for us natives. It's not that we don't appreciate these things, we are just kind of used to them.

The interesting thing about the influx of the tourist thrill seekers is the additional influx of businesses that cater to them. I am speaking mostly of the restaurants and trendy little cafés that are popping up every season, only to close, and then be replaced by another bohemian eatery with the unlikeliest of names like "Chez Possum" or "Stuff Freshly Kill't on Route 1." This is West Virginia, so using local folklore taglines gets the attention of city folk.

My wife and I accompanied by our son, recently travelled to one of these granola-crunchy diners mostly because we were hungry, and the lure of the establishment's name. My wife being a murder mystery addict would of course be drawn to anything mysterious, I

thought to myself as we waited to be seated at "The Secret Sandwich Society."

The restaurant itself was quite a little dump. Difficult to find, and not very pretty either, it screamed for Chef Ramsey to come and give this place a makeover in his ruthless fashion. Every rule about being in business was ignored, and yet, the place was packed.

Once inside the crowded little dive, I noticed that the seating was totally inadequate and cramped. The tables were just inches apart and so close that a party of three could easily be confused with a party of 12, or rather a mosh pit where everyone's food order had to be passed down a gauntlet of other patrons before reaching its destination.

As my family sat looking at the menu trying to decipher the allegoric names of the sandwiches and drawing plausible conclusions based on the ingredients, a boisterous young waiter squeezed up, greeted us and began to explain with glee the menu, how the food was prepared and all of the home made munchies they offer. He offered his advice on combinations that paired well together, then told us of all the other special things that they could not offer due to supply shortages, poured us

“These old parts stores didn't adhere to a CPA's business model, yet they all were busy.”

three glasses of water, then bounded off, tripping over another waiter, rolling off the shoulders of another seated patron, and snapping to attention at his next seating of shocked patrons with that same unfazed upbeat greeting: "My name is Mica and I'll be taking care of you on this beautiful day."

I was uncomfortable, yet my interest was piqued. The unorthodox setting of what appeared to be the basement of an old abandoned farmhouse, a dining area equally askew, a crowd of people for unexplainable reasons, a quirky name, and a

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New law may force rentals TO RESPOND TO RECALLS



The Takada air bag recall may give additional ammo to those who want to change the law.



One would think it a no-brainer for rental car companies and used car dealers to make sure all of the recall repairs on a car are done before renting or selling a car to a customer. But that is not the case.

Those repairs may or may not get done. Federal law does not require them to be made – at least not yet. But the Takada air bag recall may give added ammunition to those who want to change the law.

Leading Democrats and Republicans in the Senate and the Obama administration want to require repairs to be made prior to the rental or sale of any rental or used car. The administration has included a provision to that extent in its legislation, submitted last February, to reauthorize the National Highway Traffic Safety Administration (NHTSA). The administration’s reauthorization bill is called the Grow America Act, and it contains a number of proposals beyond fixing recalled cars. The current authorization for NHTSA expired on Sept. 30, 2014.

In addition, a bipartisan group of senators has introduced a bill called The Raechel and Jacqueline Houck Safe Rental Car Act of 2013 (S. 921). It is solely devoted

to the rental car repair topic. The bipartisan bill is named in memory of Raechel and Jacqueline Houck, two sisters who were killed in a tragic accident in 2004 while driving a rented Chrysler PT Cruiser that had been recalled for a power steering hose defect but had not been repaired. The car caught fire because of the defect, which caused a loss of steering and a head-on collision with a semi-trailer truck.

The rental car industry favors the proposal. However, the auto manufacturers and dealers oppose it. At a Senate Commerce, Science and Transportation Committee hearing on rental car safety on May 21, 2013, the Alliance of Automobile Manufacturers raised concerns about the legislation and offered to work with the committee to resolve those concerns.

The auto manufacturers oppose the bill because they believe their repair shops would be overwhelmed with rental vehicles at the moment a recall was announced. Because of their “clout,” rental car companies could demand that their cars be repaired first, said Mitch Bainwol, president and CEO of the Alliance. Ordinary consumers would be pushed to the back of the line. He also argued that many recall repairs do not impact

safety, and should not prevent a rental or used car from being sold.

One year later, just before Memorial Day weekend 2014, Sen. Barbara Boxer (D-Calif.) put out a press release saying she had written letters to the heads of the major auto companies. She said her letter asked: “Now, an entire year has passed since the Alliance made that commitment. I would like to know – will your company commit to supporting this legislation that would prohibit rental cars under safety recall from being rented or sold to consumers until the defect has been repaired?”

The Alliance’s opposition has not weakened, however. Wade Newton, spokesman for the

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STEPHEN BARLAS
Washington
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Mexico is poised for **GROWTH**

“ Mexico is forecast to grow at 4 percent to 5 percent per year for the next several years. ”

The Overseas Automotive Council (OAC) recently shared insights on the Mexican market from John Price, managing director of Americas Market Intelligence and a 22-year veteran of Latin American competitive intelligence and strategy consulting. In this month's column, Price shares some of the key insights from his report.

Mexican voters are growing impatient with their country's economic underperformance. For the last decade, Mexico has stood in the shadow of Brazil and other high-growth resource markets like Colombia, Chile and Peru. Desperate for economic growth, voters brought the much-derided PRI (Partido Revolucionario Institucional) back into power when they elected Enrique Peña Nieto.

In 2000, the PAN (Partido Acción Nacional) had broken the PRI's 70 year winning streak when President Fox was elected, but neither he, nor his PAN successor, Felipe Calderon, were able to legislate the reforms needed to modernize Mexico. Peña Nieto promised both bold reforms and the political machinery to get contentious reforms through congress.

During the last 20 months, five important reforms have been passed in Mexico. If implemented well,

these and pending reforms will raise Mexico's capacity to grow by attracting record investment to some of its most important infrastructure industries: energy, telecom and transportation.

Mexico is forecast to grow at 4 percent to 5 percent per year for the next several years, a laudable pace for a middle-income country and ahead of the Latin American average. Future Mexican growth with reforms is as much as two percentage points ahead of the rate it would have been without reforms.

The market has been positively shocked by the depth and breadth of Mexico's most promising reforms: telecom and energy. Most surprising is the imposition of a 50 percent market share cap on operators in telecoms and television. Carlos Slim, one of the wealthiest men in the world, is forced to sell off about 20 percent market share from his cellular phone assets (América Móvil). Two new television networks will be allowed to

operate and a 700 MHz shared mobile network will be created, designed to accommodate ultra-fast WiFi, the ilk of which is found in South Korea today.

Energy reform consists of both electrical power and oil and gas exploration and distribution. Opening up power generation to private suppliers combined with the right to pipe U.S. liquefied natural gas into Mexico will create vast new investments in gas fired generation in northern Mexico. Industrial electricity costs 80 percent more in Mexico than it does in the U.S.

Bringing down pricing is key to Mexican manufacturing competitiveness. Mexico's difficult-to-reach deep-water oil deposits now will begin to be exploited, both by Pemex and a half dozen Mexican industrial groups who are likely to team up with global oil companies and technology suppliers.

Mexico has traditionally attracted \$20 billion to ...CONTINUE READING ▢



CURTIS DRAPER
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AUXILIARY LIGHTING

Improved LEDs bring increased applications for auxiliary lighting

BY JAMES E. GUYETTE
News Correspondent

Fuel-efficient and longer-lasting LED lamps have become ever more mobile through the miniaturization of their solid-state electronic control systems, making light emitting diodes among the more prevalent illuminating innovations being introduced into the auxiliary lighting segment.

Forecasters at TechNavio, a global research and advisory company, anticipate that the overall worldwide automotive LED marketplace – which combines OEM factory fitments with aftermarket installations – will annually expand by nearly 28 percent through 2018.

“LED lights consume lower power, have a longer lifespan and greater shock resistance,” according to a report prepared by the company. “The global automotive LED lighting market is currently undergoing a radical change, fueled by falling prices of raw materials, exponential vehicle production and a drive toward greater energy efficiency.”

Vehicle owners and industry new-product developers alike are going with the glow as more auxiliary offerings are added to the category.

Aimed at both interior and exterior applications, the Vision line from Royal Philips includes LED bulbs for dome lights, glove box lights, brake lights and taillights, back-up lights, license plate lights and fog lights.

Designed to last at least 12 years, “you will likely never have to replace them again,” says divisional CEO Eric Rondolat.

The company’s Xtreme Ultinon Fog bulb provides a whiter, warmer and higher-lumen output, yet the pattern matches that of a regular filament bulb, he notes, adding that it emits 45 percent more light than standard halogen bulbs. “The patented SafeBeam design brings maximum visibility with a beam pattern that does not glare other road users,” he says.

A luxurious look

“As LED applications in automotive lighting ...CONTINUE READING □

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FUEL PUMPS

Fuel pump systems require top training, quality product purchases

BY JAMES E. GUYETTE
News Correspondent

Numerous factors can cause a fuel pump repair to sputter, flail and fail if the various scenarios are not properly addressed. Ascertaining the exact nature of the problem can be difficult given the numerous companion parts and electronic controls, making effective technician and counterperson training a key element.

It is equally important to make sure that a quality replacement unit is selected to avoid costly comebacks and customer ill will.

“Automotive fuel systems are more complicated than ever,” says Ben Brucato, membership director at the Automotive Aftermarket Suppliers Association (AASA). “It’s a very complex system, and misdiagnosis is a big issue with fuel pumps.”

Citing supplier statistics, Brucato reports that “more than half of the fuel pumps returned have absolutely nothing wrong with them; they test them and they work just fine.” Some 20 percent

of the returned fuel pumps are fouled because of contaminants such as dirt or bad gasoline.

“Since the early 2000s most of the OEMs went with a fuel module, which has multiple components,” he explains. “Instead of buying a light bulb you’re buying the whole fixture.”

A modern-day factory fuel pump is engineered to last well over 100,000 miles, with Asian- and American-made models viewed as being the most reliable, according to Brucato, who notes that while General Motors accounts for 30 percent of the vehicles on the road, GM replacement fuel pumps amount to half of the units being sold.

Another trend in play is that the overall after-market fuel pump category is experiencing less demand. “The size of the industry is shrinking dramatically because people don’t need to replace them as often – the quality has drastically improved,” he says.

“On the manufacturing side there’s been a huge increase in low-cost product being
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WATER PUMPS

Water pump market evolving with the flow of new technologies

BY JAMES E. GUYETTE
News Correspondent

Even if the internal combustion engine eventually goes the way of the horse and buggy, expect water pumps to remain circulating as a fluid and competitive fluid category.

GMB CEO Nobuo Matsuoka reports that the firm's engineers are actively going with the flow of the latest in automaker designs by developing specialized electrical water pumps for hybrid, all-electric and fuel cell propulsion technologies in addition to pumping up its line of mechanical OEM and aftermarket units.

Forward-looking electrically powered cooling systems are continually being enhanced to overcome proportional dependence based solely on an engine's rpm cycles. "Control of coolant volume on demand is not mechanically possible" when applied to unconventional powerplants. "It may either overcool or undercool," Matsuoka says, mandating the sophistication delivered by electronics.

"By cooling the engine precisely and only as required, electronic coolant pumps reduce fuel consumption with the additional benefit of curbing friction losses and emissions," says YH Park, president and CEO of Halla Visteon Climate Control (HVCC).

Along with facilitating start/stop applications, "the pumps support a wide range of next-generation thermal management systems where an engine belt may not be available, including cooling of batteries, DC/DC converters and power electronics," he says. "The onboard electronics deliver precise, variable flow control and respond rapidly to provide engine cooling and cabin comfort, especially at cold start."

Among other components, HVCC is supplying coolant heaters and high-voltage cooling modules for Hyundai's fuel cell-powered Tucson compact crossover SUV.

Surging product releases

"The water pump category faces many of the ...CONTINUE READING □

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