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**EVS DRAW ATTENTION** Analysis by market

AUTOMECHANIKA SHANGHAI

BY JAMES E. GUYETTE

News Correspondent

he Automechanika Shanghai exposition -Asia's largest trade show for automotive parts, accessories, equipment and services – once again set attendance records in December by attracting 4,906 exhibitors and more than 89.000 attendees from 143 nations and regions throughout the world.

Taiwan topped the list of international visitors, followed by Korea, Russia, Malaysia, Turkey, Iran, the U.S., India, Japan and Thailand. They walked the aisles of 17 permanent halls at the sprawling Shanghai New International Expo Centre plus 10 temporary halls representing a 5 percent increase in display area compared to the 2013 edition of the event.

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### Automechanika Shanghai

IN CHICAGO

The Chinese and regional governments have introduced policies supporting NEVs.



The tally of international exhibitors rose by 6 percent for a total of 581, with a 5 percent increase in participating Chinese companies to 4,325.

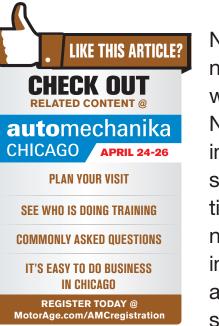
Nearly 40 nations and regions were represented among the booths, including five new countries - Belarus, Jordan, Peru, Portugal and Switzerland.

Seventeen nations fielded overseas pavilions; Argentina and Pakistan were a new presence among the larger country-centric collections of exhibits.

The Accessories & Tuning category experienced the biggest uplift in booth presence as the number of exhibitors increased by 10.4 percent, followed by Repair & Maintenance, which had a 7.3 percent rise in participation.

### NEVs in the fast lane

Among the more significant Automechanika Shanghai programs was the third edition of the NextGen Auto International Summit China, Some 15 topics were addressed relating to NEVs –



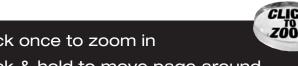
New Energy Vehicles. These include new-energy and smart vehicles as well as lighter-weight cars and trucks. NEVs are becoming increasingly important as government authorities seek to resolve the nation's air pollution problems through various economic subsidies and other assorted incentives and mandates. In 2014 about 50.000 electric vehicles were sold in China.

"China's NEV industry is driving into the fast lane," according to NextGen's organizers. "There is an active involvement of the industry and consumers on the corresponding parts development and measures to support the NEV growth."

Messe Frankfurt (Shanghai) general manager Richard Li explains that "a key focus this year is to help vehicle manufacturers and auto parts suppliers to manage partnerships, so they can execute much needed industry reform."

Both the central Chinese government and a number of ...CONTINUE READING

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### **VENDORS**

### American automakers dressing up luxury offerings to Chinese market

BY JAMES E. GUYETTE News Correspondent

hina's rapidly rising middle- and upper-classes are increasingly coveting luxury automobiles and opening doors for high-end American models while bringing along the prospect of subsequent aftermarket opportunities. The performance attributes of premium U.S. nameplates are also attracting attention, especially as well-to-do government officials - instructed by superiors to tone down the blatant bling are frequently foregoing chauffeurs in favor of getting behind the wheel themselves.

#### TRENDS & MARKET Analysis

According to data from the Digital Luxury Group consultancy, the vehicle category tops online searches among the Chinese luxury sector at 53.5 percent, besting by a wide margin beauty products (22.7 percent) and fashion (15 percent). In 2012-13 the most sought-after high-end automaker offerings were from Audi,

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BMW, Lexus, Mercedes, Porsche, Lamborghini, Volvo, Land Rover and Infiniti, with Cadillac pulling into the No. 10 spot.

Luxury vehicles have experienced "a particularly impressive growth in the last

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General Motors' Cadillac plans to introduce nine new models in China over the next five years.



several years," says Wilson Liu, head of the China automotive division at PricewaterhouseCoopers (PwC). Even as the Chinese auto market grew only marginally in 2011, the luxury segment netted a 54.5 percent growth rate. By the end of 2013, the segment was still enjoying double-digit growth of 18.4 percent, reaching sales of 1.4 million units, second only to the U.S. China is expected to surpass the U.S. in luxury vehicle sales by 2016, he reports.

Liu explains that the population of affluent consumers in China is quickly expanding, both in volume and in age range. Younger first-time buyers have increasing buying power within the market, and the result has been growing sales within the luxury segment, he says.

"The foreign luxury brands seem to appeal to young buyers as they perceive them as safer, more technologically advanced and better quality," says Liu. "On the other hand, a trend of overall vehicle downsizing, amid more stringent emission standards, is also reflected in the luxury segment. To meet these regulations, entry-level models are increasingly available

and appealing to younger, first-time buyers."

"Premium brands appeal to those amassing greater wealth - a demographic shift that is rapidly expanding in China to younger generations that are hungry for consumer goods that show their higher status," according to a PwC Autofacts Analyst Note issued in June 2014.

Luxury vehicles have an expected annual growth rate of 11.5 percent from 2013 to 2020, which is almost double the rate of standard. non-premium light vehicles. Autofacts is forecasting that the Chinese market will surpass the average luxury penetration rate of 10 percent in "mature" markets such as the U.S. to reach just over 3 million units by 2020.

"As the luxury segment proliferates, global premium brands are scrambling to localize production," says Rick Hanna, PwC's global automotive leader. "It is expected that almost all major luxury brands are expected to have domestic assembly by 2016."

Assembly localization has cost advantages that include local sourcing, market research ...CONTINUE READING ...

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### **VENDORS**

### Takata, NHTSA facing criticism due to exploding airbag controversy

BY JAMES E. GUYETTE

News Correspondent

apan's Takata and American regulators are taking it on the chin over faulty airbags that can blast shrapnel into vehicle cabins, drivers and passengers. The OEM vendor, which has several facilities in the U.S., is receiving criticism from consumer safety advocates, media outlets and lawmakers upset with how Takata executives have been reacting - or not reacting - to the problem airbags.

#### TRENDS & MARKET Analysis

And the situation is setting the stage for even wider ramifications as the National Highway Traffic Safety Administration (NHTSA) is experiencing bipartisan disdain emanating from U.S. House and Senate leaders, Democrats and Republicans alike, who say that the agency has been too slow to act.

As events continue to evolve, Takata was resisting NHTSA's demand for a national recall, Vendor Newsmaker TODD WALBURG Automotive Specialist,



Lieff Cabraser Heimann & Bernstein



Why are Takata airbags failing and not others? What does the Takata airbag recall entail?

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insisting that the suspect airbags are only subject to failure in humid climates.

On Dec. 24 the company issued a statement saying that it is "deeply saddened by the fatalities attributed to defective Takata airbags, and

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More articles by **JAMES E. GUYETTE** 

### NHTSA's delay in acting is not going over well with members on Capitol Hill.

apologizes for the widespread concern and inconvenience caused to the driving public."

Takata also announced that key executives were taking four-month pay cuts and that Representative Director Stefan Stocker was resigning from his positions as president and COO, and that Chairman and CEO Shigehisa Takada would be assuming Stocker's former duties.

According to the statement, "These changes have been made to further unify companywide initiatives to address the airbag safety issue, speed up decision making, and strengthen the company's response measures."

NHTSA has been applying heightened pressure aimed at invigorating the pace and scope of the assorted recalls being implemented among automakers. The 10 car manufacturers that installed Takata-supplied airbags in vehicles covering model years 2002 to 2008 have been initiating various recalls of their own at an ever-broadening clip, expanding worldwide into countries such as China, Japan and other non-tropical locales.

With an estimated 14 million vehicles already under recall, an all-encompassing endeavor is

the best course to take, according to industry consultant and educator Todd Hoffman, executive director of Scene of the Accident. "I think they'll eventually all be recalled," he said.

Scene of the Accident, which specializes in training repairers and emergency personnel, is headquartered in the international port of Houston along the Gulf Coast – a region engulfed in high humidity and salty air. Houston's wharves have long been filled with row upon row of parked cars and trucks offloaded from ocean-going vessels and awaiting shipment, said Hoffman.

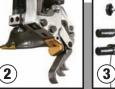
In addition to the time spent on the docks, "a vehicle on a ship can pick up salt air, so the corrosion could have started a lot earlier no matter where the vehicle is sold." Hoffman has been testing Takata airbags, and he believes rusting components are the culprit.

"I've been deploying a lot of them to capture a failure; I'm even soaking them in saltwater to see how they fail," he reported, explaining that he requested a supply of airbags from a distributor. ... CONTINUE READING

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### **DEALERSHIPS**

### Dealerships embrace millennials

NADA workforce study reveals surge in Gen Y hiring, increase in service tech pay

#### BY BRIAN ALBRIGHT

Correspondent

ounger workers are a fast growing part of the U.S. auto dealership workforce, and many of them are heading into service technicians positions with rising salaries. The National Automobile Dealers Association (NADA) released its third annual industry report on the dealership workforce.

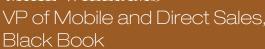
#### TRENDS & MARKET Analysis

The 2014 Dealership Workforce Study Industry Report, produced in partnership with ESI Trends, provides data on compensation, benefits, retention and hours of operation.

In 2013, total dealership employment grew 3.4 percent to more than 1 million people. The weekly median earnings in 2013 were \$976, or 25 percent more than the average median weekly earnings for the U.S. private sector workforce. Earnings grew again this year, although at a slower place than in 2012 (1.3

Dealer Newsmaker

MIKE WILLIAMS





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percent versus 3.7 percent). Turnover in dealership employees is also lower than in the private sector (36 percent versus 42 percent).

As was the case last year, the number of "Generation Y" employees or millennials (those

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Service manager pay decreased slightly in 2013, while technician pay went up.



born after the early 1980s) also expanded. According to the research, 47 percent of new hires were from Gen Y, bumping their representation up to 27 percent of the total dealership workforce. Last year, that number was 23 percent.

"Last year the percentage of Gen Y working at dealerships was about the same as in the general workforce," says Ted Kraybill, president and founder of ESI Trends. "The U.S. percentage didn't change this year, but the dealerships grew four percentage points. Most of those are coming in as new service technicians and sales consultants."

Work-life balance is also improving as dealerships try to find ways to ease the long schedules that used to be associated with dealership jobs. The percentage of dealerships that schedule employees to work more than 45 hours per week has dropped every year for the past three years. Only 13 percent of dealerships surveyed scheduled sales consultants to work more than 50 hours, and just 16 percent scheduled service advisors to work those hours.

While the number of women at dealerships increased last year, that figure flatlined in the 2013 data. "That was surprising, because the industry is doing a lot in terms of changing the culture and work-life balance that should theoretically attract more women," Kraybill says. "But we saw no change."

### Compensation trends

There have traditionally been pay gaps between high-end luxury dealerships and other dealerships, as well as between different positions within a single dealership. Kraybill says that the gap is narrowing. "The high end of the bell curve stayed the same, but the middle of that curve tightened up some more, so the difference in the medians of various positions narrowed," Kraybill says.

For example, the finance and insurance (F&I) manager median moved down, and the median for sales managers moved up. "But the number of F&I managers making more than \$200,000 went up, and is significantly higher than the percentage of sales managers making that salary," Kraybill says.

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### TECHNOLOGY SOLUTIONS

### A better view of inventory demand

Timken solution helps improve inventory optimization, supply chain performance

#### BY BRIAN ALBRIGHT

Correspondent

nventory and demand forecasting remain critical challenges in the automotive aftermarket, but technology is advancing that can help suppliers and distributors make better decisions about the placement of inventory – right down to the zip code - that can increase turns, reduce obsolescence and save costs.

#### TRENDS & MARKET Analysis

Timken is one of several aftermarket companies that is leveraging sales history, registration data, and other information, along with complex analytics, to improve sales and reduce costs. The company uses an internally developed solution called Demand Insight to help distributors optimize their inventory.

Timken's catalog team matches parts and vehicles, and combines that information with vehicle registration and replacement/failure rates, along with internal sales data. Crunching that data using proprietary algorithms helps

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Q&A

#### STEVEN STURM

AOL Advertising's Category Development Officer for Autos



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them predict how many parts will be needed in a given geography, and how those parts sales will fall within the premium aftermarket, economv aftermarket and OEMs.

More than 300 distributors and Timken sales representatives now use the online system,

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This type of data-driven, intelligent forecasting is expanding in the aftermarket.



and it includes more than 4,000 parts with vehicle applications. Customers can access detailed analysis and charts showing demand for specific parts based on location. They can also view the most popular parts in order of demand, along with peak demand based on part lifecycles.

"We've been able to take VIO and cataloging data, and add a third element in the replacement rates," says Barry Harris, global manager of automotive aftermarket at Timken. "We're an OE manufacturer, and we know the replacement timing of our parts. Using that information and some sophisticated logic we developed, we can say in general when you can expect demand for those replacement parts to begin. The question then is, how do you make that forecast better? That started us down the path of using geographic information, and now we're even adding information on weather patterns and local road conditions."

Timken launched Demand Insight in 2010 and the Canadian market went online in 2012. There have been other tweaks over time. including the addition of a data source that

helps predict new vehicle registrations for up to two years into the future; flags that indicate part applicability for agricultural or heavy-duty vehicles; and the ability to do multiple searches in multiple tabs. In 2014, the company added medium-duty vehicle aftermarket demand.

This type of data-driven, intelligent forecasting is expanding in the aftermarket. Delphi, for example, has an Intelligent SKU Management solution that uses proprietary research, market trends and customer provided information to help optimize inventory for local markets. Goodyear Engineered Products has the DataDrive Market Intelligence System, which uses Veyance Technology's algorithms to evaluate stocking levels by region, county and metro area for warehouse distributors. TRW Aftermarket uses a big data solution from PROS Holdings to make tailored offerings and improve pricing strategies based on inventory data.

Large distributor groups also have developed their own inventory management tools for forecasting. ...CONTINUE READING





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### Preaching to THE CHOIR

We have to get our egos out of the way so we can learn the things that hold back our growth.

should probably title this column "The Choir Newsletter," just in case it falls into the hands of someone other than the choir, as sometimes has been known to happen. I want to talk about something we are all aware: education.

Choir member John Tisdale of ASE once told me that training is like a diet book for fat people; you can buy the book and feel good about it but unless you actually read it and apply the information, nothing is going to change. Many shops buy the training but either don't attend at all or attend, nod their heads and go right

> back to the shop and do the same things that they have always done.

Worse yet, I see an alarming number of journeyman technicians who think that once they have reached the level of master technician they know everything they need to know. If you think I am kidding I invite you to one of my classes.

There is always a guy who walks in because his boss

made him come and his mind is closed. There is nothing he can learn that he does not already know. Not coincidentally he is also the guy who doesn't want to work on hybrids because they are stupid, hates diesels because they stink and thinks the small block Chevy is the pinnacle of technological advancement. Brand loyalties aside my friends, you know these guys and I hope they do not belong to you.

There are very few issues in our industry that cannot be solved with a little enlightenment. In fact, there are more than a few issues that exist in our industry due to a lack of enlightenment. So because you are a member of the choir, let's talk about the programs that are out there to enlighten us. Many of you have the attitude that if you can attend a class and take away one useful thing that class was a success. I completely agree with you. A couple of years ago I attended a Vin Waterhouse class and learned one thing that changed our shops profit structure. I have attended classes by NAPA's number crunching wizard more than once and each time there is something that fits me at that time and finds its way into our shop management toolbox.

For years trainers and meeting planners have tried to figure out how to get journeyman technicians to attend in-service fundamental electrical training programs. If you put basic or fundamental in the title then master techs all claim expertise and refuse to attend yet, when I put a diagram that shows a voltage drop test (one of the most fundamental and necessary tests we per-

form) up on the screen rarely more than a handful can tell me what the test shown is and what we are trying to learn from it.

My friend Bob Pattengale of Bosch is teaching these clearly more advanced techniques as "Practical Electrical Testing." We have to figure out how to get our egos out of the way so we can learn the things that hold back our growth. I know that as teachers we are constantly experimenting with new ideas and are all ears for solutions.

There are programs by suppliers like Bosch and Gates

Rubber ... CONTINUE READING

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### When competitors GET MARRIED

Someone is likely to dominate this relationship and someone is likely to lose their identity.

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here is an old saying that "Marriage is the leading cause of divorce" and this statement, though not very poetic, is representative of reality.

The surreal effect comes with sweeping changes, heightened emotion, myriads of compromise and let us not forget the influence of in-laws. Plus, there are the endless and often pointless arguments about which party is responsible for which chores, where to spend the holidays, and who "wears the pants" in the family. All of that needs to be resolved in due time, and hopefully before children are spawned, adopted or put up for adoption. Let's face it, some kids are the seed of Satan.

Enough about my life, let's talk of mergers, acquisitions and leveraged buyouts that make headlines within our own industry, such as the merger of the Federated and Pronto buying groups. Often, hasty unions, much like life, make us wonder if one or the other was in a "delicate way" or vulnerable. Both groups are longterm, much touted programs in their own right, so what's the reason?

In "the ye olde times" this merger could be likened to that of a royal arranged marriage where the King of England married off his daughter to the son of the King of Spain to ease tensions between the two countries, or

to share titles of land and wealth. By combining the royal houses, their combined power and influence yields new respect recognized by friend and foe. Many reasons for such unions make sense for all involved, but the inner workings and fine-tuning required for longevity are what I find to be the most curious, and quite secretive.

Someone is likely to be dominant in this relationship and someone is likely to lose their identity by way of a name change. Or, possibly a whole new name as the Auto Value/Bumper-to-Bumper pairing gave us. And there's always the hyphenated option, so who knows.

Both Federated and Pronto are very traditional in market approach, yet are somewhat dominant in different parts of the country, so one must ascertain this merger will lead to geographical growth first and foremost.

Secondly, their name brands line up pretty well, as do the manufacturers of their "short lines." Still there will be some shuffling and realignment that likely will drive the manufacturers crazy and a lot of distressed or reboxed merchandise likely will be abundant.

When my wife and I got married, my favorite recliner didn't match the drapes, was stinky, covered in stains, and although comfortable, only made it to the garage and no further when we were moving in together.

Whenever my new bride (now wife of 30 years) got upset with me during the first few years of marriage, I would retreat to the garage with a cigar and a bottle of whatever adult beverage I could find, and that old recliner comforted me, welcoming me into the folds of it's

foot rest, and I was reminded by countless stains, rips and tears of simpler times when my loneliness had its rewards too.

broken arms, wobbly

Plus, I used to love greeting my mother-in-law when she arrived, sitting in that chair with a smelly cigar and wearing a Burger King Kids Meal Crown, waving around a home-MARK SMITH made scepter that President, Wholesale Auto Parts

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### NTSB considers

### TIRE REGISTRATION CHANGES

If Congress doesn't act, a recommendation to NHTSA could result in a regulatory change.

he National Transportation Safety Board (NTSB) has picked up the issue of tire safety, and its concern could lead to recommendations for regulatory changes affecting tire dealers.

The NTSB is investigating some 2014 tire blowout accidents that resulted in deaths, which were discussed at a meeting in Washington in early December. The meeting served as a forum for the Rubber Manufacturers Association (RMA), which represents tire manufacturers, to push a proposal that Congress change the tire registration law to require dealers to electronically register the tire identification number (TIN) with the National Highway Traffic Safety Administration (NHTSA) at the point of sale.

If Congress doesn't act, a NTSB recommendation to NHTSA could result in a regulatory change. The NTSB will be making recommendations of some sort in the near future.

Four serious accidents in 2014 resulting from disabled tires resulted in the NTSB two-day symposium on tire safety on December 9 and 10. The accidents occurred one week apart in February, in Florida and Louisiana, and resulted in multiple deaths in both

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instances. The NTSB has not released reports on those accidents yet.

In one case, a poorly maintained, 10-year old tire separated at high speeds. In the second, the separated tire had been the subject of a recall a year and a half earlier. NTSB staff members at the workshop cited two additional accidents in 2014 that are not the subject of investigations.

Kevin Rohlwing, senior vice president of training for the Tire Industry Association (TIA), believes more has to be done to prevent tire separation accidents. That includes improving the NHTSA tire registration/recall process and informing consumers about the need to register tires and maintain them. And the TIA is willing to do its part. However, Rohlwing emphasizes the entire burden for improving tire safety should not be laid on the back of dealers. He opposed requiring dealers to electronically register new tires.

Moreover, Roy Littlefield, TIA executive vice president, is miffed the RMA sprang its electronic registration proposal on the TIA. "We are incredibly disappointed that RMA supports a legislative solution to the problem of low tire registration rates rather than

educational," he says. "TIA has been working with RMA on a number of legislative issues like tire repair and used tires over the past few years, but there have been no discussions related to mandatory tire registration. We had talked about working together to educate and improve voluntary numbers, so it was a total shock to hear that they are proposing legislation over education."

The Transportation Recall Enhancement, Accountability and Documentation (TREAD) Act was the last piece of tire safety legislation Congress passed. That was in 2000. The TREAD Act was passed because

of problems with Firestone tires. The TREAD Act included directives to NHTSA to ...CONTINUE READING Reseller **Product** Study

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Washington

Correspondent

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### What you need to know

### ABOUT SELLING PARTS ONLINE

Determining vehicles your products are compatible with is the first step.



magine that you run a brick-and-mortar shop located on the side of a busy highway. You're advertising on billboards, running special promotions and doing everything you can to create interest. But traffic is sparse, and you're wondering how you'll ever get noticed.

With e-commerce, many automotive parts and accessories sellers are finding themselves in a similar scenario, and with similar questions: How do buyers find me and learn that I'm selling what they want?

If you develop a comprehensive strategy that focuses on increasing your product visibility, the e-commerce world can be your next key revenue stream. Retailers that stay on top of industry trends and adapt to changes can build a thriving business that puts their online revenue in the fast lane.

Are you in a scenario where you're looking to improve your online business? Let's take a look at best e-commerce practices for parts and accessories retailers that want to accelerate their revenue.

#### Fitment/compatibility/application

Determining which vehicles your products are compatible with is the first step to improving your e-commerce performance. The next step: including accurate data to

instill confidence that your product is compatible with the buyer's vehicle. Additionally, indicating that a part fits more than one vehicle reduces the number of product listings you need to create, pay for and manage.

Some marketplaces, such as Amazon, eBay and Newegg, encourage buyers to add their vehicle information to their accounts so that only applicable products are displayed. These "virtual garages" allow consumers to create a tailored shopping experience for their vehicles. Buyers can still find products that fit specific vehicles when they use each marketplace's year/ make/model search options.

Once you've optimized your fitment information, you're ready to shift your sales into gear by selling on online third-party marketplaces. Each marketplace offers ways for you to indicate the fitment of your parts which we'll cover next.

#### eBav

eBay Motors is the original online marketplace for parts and accessories. In fact, as of Q2 2014, eBay reported that more than 392 million parts and accessories transactions occurred on the eBay Motors marketplace since its launch.

The first order of business on eBay is to communicate fitment information by sending the brand and manufacturer part number (MPN) to eBay. Then, eBay uses its extensive fitment catalog to provide compatibility data (as well as item specifics, stock photos and other product information). Or, you can submit fitment information manually, since not all categories of parts and accessories have fitment matches in eBay's catalog.

eBay sets limitations on the number of compatibilities that can be associated ... CONTINUE READING



RACHEL MILLER Senior Product Marketing Manager, ChannelAdvisor

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### Latin American market REVIVAL CONTINUES

hile some countries in commodity-rich Latin America still face challenges due to low raw material prices, many bright spots exist in this diverse and vibrant region. Many opportunities exist in Latin America for North American automotive and heavy-duty products.

Here are some highlights from Latin America in 2014 and forecasts for 2015:

Brazil - Brazil experienced a roller coaster ride in 2014 in the run-up to the re-election of President Dilma Rousseff to a second term. This largest of South America's economies continues to grapple with inflation pressures. President Rousseff has recently stated that she intends to cut public spending that doesn't support domestic consumption or investment. Brazil is facing headwinds from higher interest rates, weak external demand, soft commodity prices and subdued consumer and business confidence in 2015.

**Mexico** – This second largest Latin American market is expected to continue to benefit from its strong links to the U.S. and an anticipated revival of the U.S. economy in 2015. The Mexican economy is expected to accelerate in 2015 and inflation to moderate. Mexico is well positioned for the changing global macro dynamics. Reforms introduced by President Enrique Peña Nieto in telecom, taxation and energy are expected to benefit the country's economy through higher productivity, increased competitiveness and enhanced investment prospects.

Colombia - In 2014, Colombia was the only country in the region to exhibit a healthy GDP growth rate. However, continued lower mining and oil sector output could reduce Colombia's GDP growth in 2015.

Peru and Chile - The economies of Peru and Chile are largely dependent on mining and related activity. The sector had been on the decline due to lower commodity prices, but is expected to gradually recover in 2015. While growth may have slowed, Peru and Chile remain strong economies. The Peruvian government cut taxes and increased government spending to boost growth. Peru's economy is expected to grow 5.1 percent in 2015 while Chile is expected to grow at 3.3 percent in 2015.

The AASA Overseas Automotive Council (OAC) is planning a trade mission to Peru in late March, held in conjunction with the automotive trade show



The Mexican economy is expected to accelerate in 2015 and inflation to moderate.



EXPOMECHANICA. The event will provide North American suppliers the opportunity to expand their global outreach into key Latin American markets. For more information on the trade mission and OAC's other programs and benefits, visit www.oac-intl.org or contact Curtis Draper, OAC executive director, at cdraper@aasa.mema.org or 919-406-8856.

Editor's note: Curtis Draper is vice president of industry analysis, programs and member services at the Automotive Aftermarket Suppliers Association (AASA) and group executive of AASA's international aftermarket councils: the China

Aftermarket Forum (CAF) and the OAC. CAF is a consortium of full-service suppliers that meet quarterly to discuss opportunities in the Chinese aftermarket and to identify ways to address challenges in the segment. For more details about CAF, click on www.aftermarketsuppliers.org/ Councils/CAF.



**CURTIS DRAPER** Vice President, Industry Analysis, Programs and Member Services, AASA

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RESELLERS SAY
PRICE IS KEY AMONG
DIY CUSTOMERS

BY BRUCE ADAMS

Managing Editor

rice trumps all else in the do it yourself (DIY) market, according to the latest Aftermarket

Business World Reseller Product

Study. While 53 percent of respondents said price was the top need of their DIY customers, only 9 percent said price was the most important attribute of their professional customers.

The top product attribute among professional customers was a tie between quality and availability, which each garnered 36 percent of responses. Among professional customers, OEM form, fit and function ranked third with 11 percent of the responses.

Among DIY customers, availability at 18 percent and quality at 16 percent were a distant second and third to price as their top need. OEM form fit and function ranked fourth with 7 percent of respondents.

Some 61 percent of resellers said their product sales increased in 2014, while 32 percent said sales stayed the same. Among those who experienced increases, 23 percent said sales were up 1 percent to 5 percent, 24 percent were up 6 percent to 10 percent and 10

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percent were up 11 percent to 15 percent.

Resellers look forward to 2015 with promise as 70 percent expect their sales to increase, while 29 percent expect their sales to stay the same as 2014. Of those expecting an increase, 30 percent think 2015 sales will increase 1 percent to 5 percent, and 24 percent believe sales will increase 6 percent to 10 percent.

Some 63 percent of respondents said they did not make any internet sales in 2014 while 7 percent sold more than 20 percent of their products online.

Almost half of resellers responding (49 percent) said the majority of their inventory is national brand product, while 31 percent said their inventory is evenly split between national brands and private label.

Methodology: The Reseller Product Study was fielded to readers of Aftermarket Business World via email. Survey results are intended to show general market trends, not statistical certainties.

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### Brakes

### PRIÇE RULES

RESELLERS
SAY PRICE
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Reseller Product Study

Needs of professional customers

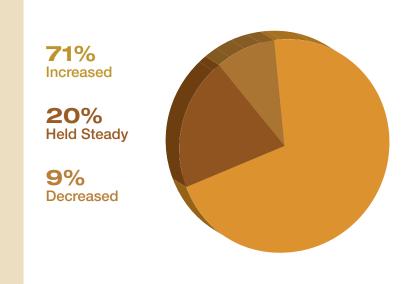
Quality	46%
Availability	22%
OEM form, fit & function	11%

#### **Needs of DIY customers**

RESELLER PRODUCT STUDY

Price	51%
Availability	14%
Quality	22%

### 2014 brake sales



59% of resellers report they make none of their brake sales online.

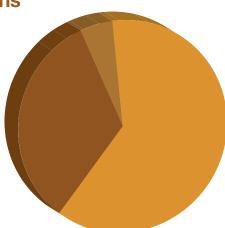
46% report the majority of brake inventory is national brand products.

#### **Expected 2015 gross margins**



**33%**To Hold Steady

**5%**To Decrease



Lighting Philips

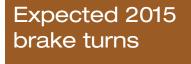
**Auxiliary** 

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2015 brake sales expectations

To increase 1-10%	51%
To increase 11-20%	25%
To hold steady	19%
To decrease	0%



1-2	17%
3-4	33%
5-6	19%

**69%** turn to

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### **Auxiliary Lighting**

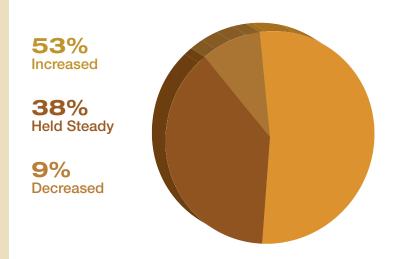
#### **Needs of professional customers**

Quality	28%
Price	9%
Availability	46%

#### **Needs of DIY customers**

Price	58%
Availability	11%
Quality	18%

### 2014 auxiliary lighting sales



**60%** of resellers report that they make no auxiliary lighting sales online.



**RESELLERS SAY PRICE** IS KEY AMONG **DIY CUSTOMERS** 

50% report their auxiliary lighting inventory is national brand products.

#### **Expected 2014 gross margins**



2015 auxiliary lighting

sales expectations

To increase 1-10%	57%
To increase 11-20%	12%
To hold steady	29%
To decrease 1-20%	0%

Expected 2015 auxiliary lighting turns

1-4	82%
5-8	11%
9-10	5%
11-12	2%

73% turn to

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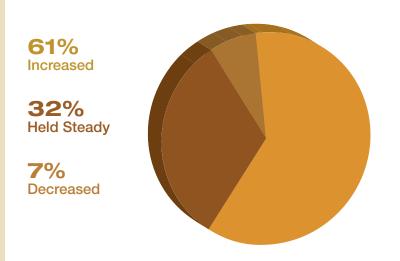
#### **Needs of professional customers**

OEM form, fit and function	16%
Quality	36%
Availability	34%

#### **Needs of DIY customers**

Price	48%
Availability	32%
Quality	9%

### 2014 water pump sales



71% of resellers report they make none of their water pump sales online.

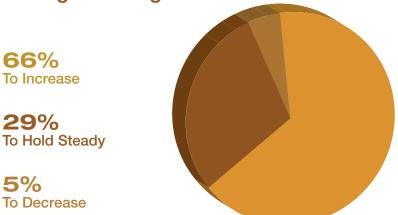
51% report the majority of their water pump inventory is national brand products.

### **Expected 2015 gross margins**

66% To Increase

29%

5%



2015 water pump sales expectations

To Decrease

10 Increase 1-10%	52%
To increase 11-20%	7%
To hold steady	38%
To decrease	2%

### Expected 2015 water pump turns

1-2	45%
3-4	33%
5-6	8%
7-8	5%

72% turn to

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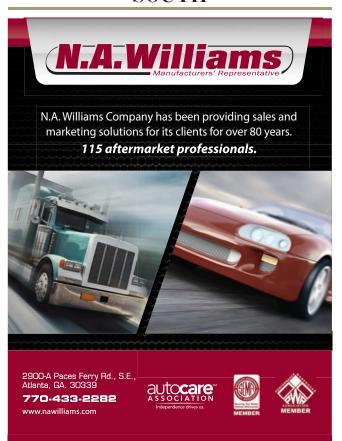
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