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# EAST MEETS WEST IN TURKEY

## WHERE A VIBRANT MARKET AWAITS

BY RICHARD MEZADURIAN | Contributing Editor

East has met West in what is now modern day Turkey for nearly 4,000 years. Since as far back as the second millennia B.C., traces of what would become the Silk Road were established, bringing rare gems from Asian mines to ancient Europe. Through the time of the Ottoman Empire, Europeans traded their wealth for fine Asian luxuries such as silks and spices. In the

early 21st Century, not a lot has changed. Turkey is still looked upon by Westerners as a gateway to the East. And for many in Asia, Turkey is often the first destination for their exports. But Turkey itself, by virtue of its straddling of two continents, has transformed itself

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### Analysis by market

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**Turkish aftermarket:** Vehicle parts and service suppliers will enjoy stable growth in the Turkish automotive aftermarket, but they must face the risk of financial volatility.

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# Turkish aftermarket



Turkey is the world's 17th largest economy, with a GDP just over \$1.7 billion.



into a key player on the world stage. It has become a manufacturing base for Europeans; it's a regional political leader, and a key NATO ally in a politically unstable part of the world.

By virtue of its geography, Turkey considers itself neither European nor Middle Eastern. It's both. And it's neither. This has allowed Turkey to develop its unique character. This divided self has permeated all sectors of Turkish life. Though it is an Islamic republic, Turkey prides itself on its secular institutions. Its economy, while currently very strong, is often subject to fits and starts.

And this dichotomy plays out into the automotive aftermarket segment as well. While segments of the aftermarket are highly brand conscious and loyalty driven, there is a large and growing segment that is entirely price driven.

Turkey is the world's 17th largest economy, with a GDP just over \$1.7 billion. In the five years after the global economic crisis, Turkey has seen strong economic growth average 5.6 percent per year. In 2014, the growth moderated to about 2.9 percent. However, according to the World Bank, Turkey is considered a "middle class" country, as the average income for a high

school graduate averages \$10 per hour.

But keeping with its tradition of duality, Turkey is also a country of very rich and very poor. Turkey has more than 35 billionaires, which is good for fifth place in the world. Still, 15 percent of Turks live below the established poverty line. In a country of 81 million people, that's still a very big number. Demographically speaking, Turkey does have an important advantage over its neighbors in Europe. More than 40 percent of the Turkish population is less than 24 years old, while only 6.7 percent of the population is over age 65. By contrast, Europe's elder population is already topping 17 percent and will top 20 percent by 2020.

Having a financially sound population of young drivers will be very important in driving the growth of the aftermarket for many years to come. Turkey's motor vehicle population has tripled since 1990, to about 18.5 million cars and trucks currently in operation. This makes Turkey double the size of Saudi Arabia, which has just over 9 million registered vehicles. With strong locally based manufacturing plants

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# VENDORS

## OEMs, aftermarket exploring Cuba's unique automotive potential

BY JAMES E. GUYETTE  
News Correspondent

**A**las, Cuba's famed creampuff vintage cars may not be all they're cracked up to be. So many of these classic pre-1960 "Yank Tanks" from Detroit have been extensively altered via foreign-built diesel engines and other non-Concours components, with powertrains, interiors and finishes battered, bruised and abused through many years of daily driving – resulting in drastically reduced values as pristine collector's delights.

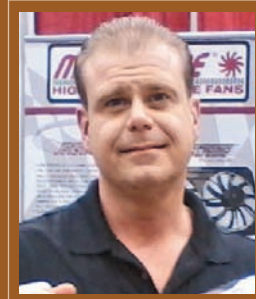
**TRENDS & MARKET Analysis**

However, assuming that Cuba's laws banning vehicle exports are eventually relaxed to allow some them off the island, a selection of Cuban cars could be deployed as museum exhibits and traveling car show and county fair displays of Cold War ingenuity, offering a snapshot in time to portray the amazing engineering ability of Cuba's shade-tree mechanics to keep these beasts running.

Vendor Newsmaker

### Q&A

**C.J. CLAYTON**  
National Sales Manager  
DCM Manufacturing/Maradyne



**Q** What are the key selling points for marketing vehicle-cooling fans?

**A** What did Clayton say? Continue reading online.

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"You'd take a '51 Ford and put it next to a dinosaur. It's a cultural relic," says Rick Shnitzler, lead organizer of the Philadelphia-based TailLight Diplomacy advisory working group, which has long advocated car-culture

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“Creativity has long been the standard operating procedure for Cuba’s home-grown mechanics.”

exchanges between the two nations.

Diplomatic inroads initiated by President Barack Obama and Raúl Castro are again heightening awareness of Cuba’s unique car population, accelerated by omnipresent b-roll television footage of vintage vehicles to illustrate the coverage.

“All of the mainstream TV networks and print media are using clips of Detroit’s cars on the streets as a picture of Cuba,” Shnitzler points out. “You have this firestorm developing,” and the excitement is even illuminating the silver screen: In April the Havana Motor Club movie, which tells the story of underground hot-rod-ders trying to conduct an officially sanctioned drag race shortly after the 1959 revolution, drew rave reviews with its world premiere at New York City’s prestigious Tribeca Film Festival. A Cuban delegation associated with the flick took a side-trip tour of Philly to view auto collections and take in the city’s historic sites.

“It’s an interim period. A lot of it just waiting to see what will happen,” says Shnitzler, who foresees opportunity ahead for American automakers and aftermarket businesses.

Restrictions related to visitations and the embargo will have to be resolved before commerce can commence.

To speed things along in the meantime, TailLight Diplomacy is urging Ford, General Motors and Chrysler – along with aftermarket vendors – to start publicizing their new product lines and restoration parts through exchange programs designed to connect Cubans and Americans. The proposal has already been pitched to Cuba’s official representative in the U.S., who works out of Switzerland’s embassy pending full diplomatic recognition.

The ideas include bringing Cuban classics to the U.S. for admiration and analysis at museums and technical centers in exchange for new vehicles being donated to the contributing family. “The amount of brand enhancement from just a few new cars would be huge,” Shnitzler contends.

“Tap into that brand awareness that already exists,” he says. “That would be a huge chip to generate interest in American cars.”

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# VENDORS

## Electric vehicle charging stations to offer added revenue options

BY JAMES E. GUYETTE  
News Correspondent

As the aftermarket starts plugging into the prospect of repairing plug-in electric vehicles (PEV) that currently remain mostly within the domain of car dealership service centers, opportunities are arising for installing and maintaining the vast array of charging stations necessary to ease “range anxiety” and further spark PEV sales.

### TRENDS & MARKET Analysis

In addition to servicing the growing presence of charging units, collectively known as electric vehicle supply equipment (EVSE), “there is also a business for the installation of them, especially for home chargers,” reports Lisa Jerram, principal research analyst at Navigant Research, which has prepared several in-depth studies on the EV segment. “You’ll see more people wanting to install home chargers; a local company can offer a package deal” that could include vehicle maintenance offerings along

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**MIKE CASTEEL**  
Director of Fleet Procurement  
UPS



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with charging station upkeep.

“There is an opportunity to make the process as seamless for the customers as possible.” Dealerships currently dominate the EV realm because of the complexity of the designs. “The



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Charging unit providers maintain the installation and service as an in-house operational strategy.



technology is relatively new and the technology is changing rapidly,” Jerram explains. Yet continued proliferation of charging stations is an endeavor that can benefit the entire category – reducing range anxiety issues will drive heightened acceptance. “This will help the EV market as well, so the automakers should be interested” in cooperating with convenient charging sites.

“It’s still a competitive Wild-West space,” Jerram continues, referring to an ever-changing and ever-expanding EV marketplace; 2015 sales of PEVs in the U.S. are expected to reach 220,000 vehicles. And although these purchases amount to just 1 percent to 2 percent of the domestic car parc, “it’s definitely a solidly growing market,” she points out. “There’s a real potential as more companies put chargers into place.”

Two segments are involved: Residential and commercial. Residential charging is closely tied to PEV sales levels and continues to grow in tandem with the PEV market. Commercial charging is dependent on a viable business model or major governmental efforts and initiatives for its success, according to Jerram.

“Both markets exhibit different trends at a national or state level, depending on factors such as population density, utility involvement and policy push for PEV adoption.”

With the number of PEVs in use projected to reach 12 million globally by 2023, EVSE demand is expected to evolve as well, rising from \$152.6 million in 2015 to nearly \$3 billion over the next decade. “Sales of EV charging systems are expected to grow steadily in the coming years, surpassing 2.5 million units by 2023,” says Jerram.

In the U.S. there are about 250,000 charging units currently in place. Expect to see more than 900,000 of them by 2023, amounting to a \$1.4 billion EVSE domestic marketplace. The category includes plug-in hybrids (PHEVs).

Publicly located chargers continue to proliferate at rest areas, shopping centers and other gathering spots, and workplace charging is picking up as well. Some charging networks have usage fees, others charge via subscription, and an increasing amount of entities ...CONTINUE READING □

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# DEALERSHIPS

## Dangerously low recall response

Auto recalls are way up, but drivers don't always get the repairs made

BY BRIAN ALBRIGHT  
Correspondent

The number of vehicles recalled in the U.S. reached a record high last year, but even as important safety recalls get more attention in the U.S., drivers often fail to get their vehicles repaired. That means millions of people in the U.S. are driving, buying or selling potentially dangerous vehicles.

TRENDS & MARKET Analysis

Research released earlier this year from Carfax indicates that more than 46 million cars nationwide have at least one safety recall that's never been fixed, and 5 million of those vehicles were bought and sold in 2014. That is an enormous increase over the 2013 figures, when Carfax estimate there were just 3 million cars on the road with an open safety recall.

One in three minivans and one in five SUVs has an unfixed recall, according to the report. California, Texas, Florida, New York and Pennsylvania have the highest number of unfixed recalls. States with the highest ratios of unfixed

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Q&A

**GREG MAY**  
Owner  
Greg May Honda



What challenges did you have prior to the expansion and how did you determine the best way to expand?



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recalled cars include West Virginia, Michigan, Mississippi, Wyoming and New Jersey.

"America's cavalier response to manufacturer safety recalls is putting lives at risk," said Larry Gamache, communications director at Carfax.

"Every morning millions of people drive to work,



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“More than 46 million cars nationwide have at least one safety recall that’s never been fixed.”

school and other places in a potential ticking time bomb. Fires, crashes and serious injury are just a few consequences of letting recalls go unfixed. The minor inconvenience that comes from having a recall fixed pales in comparison to what can happen if you don’t.”

The National Highway Transportation Safety Administration (NHTSA) requires automakers to quickly notify regulators and owners when a defect is uncovered. But that doesn’t mean owners actually get the repairs made. A 2011 audit by the General Accounting Office (GAO) found that less than 70 percent of vehicles under recall were actually repaired.

The problem is only getting worse as the pace and size of recalls increases. There were 64 million vehicles targeted by recalls in 2014, twice the previous record set in 2004. The recent Takata airbag recall has thrown this problem into sharp relief.

In that case, 17 million vehicles manufactured between 2002 and 2008 by 10 different auto-makers were affected. The airbags could potentially deploy explosively, injuring or killing drivers.

Earlier this year, U.S. Transportation

Secretary Anthony Foxx announced Takata would receive a \$14,000 per day fine for failing to fully cooperate with the NHTSA’s investigation into the defective airbags. Late last year, NHTSA issued two Special Orders to Takata requiring the company to provide documentation and other material relating to the agency’s ongoing investigation.

A few days after announcing the fines, the DOT also issued an order requiring Takata to preserve all air bag inflators removed in the recall process to use as evidence for both NHTSA’s investigation and private litigation cases.

### Reaching out to drivers

OEMs are upping their efforts to improve recall response rates, particularly for the Takata airbags. Chrysler, Ford and Toyota have all reached out to drivers via direct mail and phone campaigns. Honda, meanwhile, has launched a massive advertising campaign to improve recall response. According to the company, as of March of this year only 1.1 million of ...CONTINUE READING □

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# TECHNOLOGY SOLUTIONS

## Delphi autonomous car is first to complete coast-to-coast journey

BY BRIAN ALBRIGHT  
Correspondent

This spring, a high-tech, self-driving car traveled across the country, carrying its passengers safely from coast to coast with very little intervention from the otherwise unoccupied "driver." The car, designed by Delphi, set off from the Golden Gate Bridge on March 22, and drove 3,500 miles to New York.

### TRENDS & MARKET Analysis

The trip, the longest autonomous drive cross-country in a car, was accomplished with 99 percent of the drive in fully automated mode over nine days, the company said. Two teams of three Delphi engineers were in the vehicle (one behind the wheel, two in the backseat analyzing sensor data), each team riding along for half the drive.

The coast-to-coast trip allowed Delphi engineers to capture important technical data and road test new safety technology. According to

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### Technology Newsmaker

## Q&A

**BEHZAD RASSULI**  
VP of Market Intelligence  
Auto Care Association



**Q** What has been the response to the study E-tailing Insights so far?

**A** What did Rassuli say? Continue reading online.

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the company, the team collected nearly three terabytes of data.

"We've tested the car in crazy Las Vegas traffic and on highways in California, so we decided to take an extended trip to see all of



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The vehicle was worth approximately \$500,000 including all the on-board electronics.



the different scenarios you can run into,” says Delphi CTO Jeff Owens. “We wanted to take that information and use it to make the sensors better and more cost effective, and to guide forward development.”

The nine-day trip crossed 15 states and the District of Columbia. Along the way, the vehicle encountered complex driving situations such as traffic circles, construction zones, bridges, tunnels, aggressive drivers and a variety of weather conditions.

Delphi used an Audi SQ5 modified with new radar, laser scanner, and camera technology. Another version of the car (an Audi A7) was previously demoed in Las Vegas at CES 2015 and driven roughly 560 miles.

While a few states have passed legislation to regulate the use of self-driving vehicles, Owens says the company didn’t have to make any special accommodations to operate the vehicle from state to state, other than having a driver behind the wheel at all times.

“We also had to follow the speed limit exactly,” Owens says. “You have to program the vehicle at the speed limit, because it would certainly be hard to explain why you programmed it to go above the speed limit. But that meant we got passed by everybody. We weren’t just the first to go coast-to-coast in an automated vehicle, we were probably also the first car to do it going the speed limit.”

### Sensor-packed car

The trip puts Delphi ahead of Google, Apple and other better-known tech companies that launched autonomous vehicle projects. The Delphi vehicle also looks relatively normal, compared to earlier versions of Google’s self-driving cars, which were equipped with bulky, roof-mounted equipment.

“Our vehicle looks uniquely normal,” Owens says. “All of the sensors are styled in, and to the untrained eye it looks like a normal vehicle. You can also open the trunk and put your luggage inside it. The other prototypes I’ve seen have a trunk full of laptops and power supplies.”

Among the technologies in the Delphi car:

- Radar, vision and Advanced Drive Assistance Systems (ADAS).
- Multi-domain controller: High-end microprocessor to seamlessly drive multiple features and functions.
- V2V/V2X: Wireless vehicle communication technology extends the range of existing ADAS functionality.
- Intelligent software that enables the vehicle to make complex, human-like decisions for real-world automated driving.
- Traffic jam assist.
- Automated highway pilot with lane change (on-ramp to off-ramp highway pilot); ...CONTINUE READING

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LEGAL NOTICE

**If you purchased certain Aftermarket Automotive Sheet Metal Products (“AMSM”) directly from one of the Defendants below between January 1, 2003 and May 14, 2015, your legal rights may be affected by a Class Action Lawsuit and you may be entitled to a cash payment.**

*Defendants Include: Taiwan Kai Yih Industrial Co., Ltd.; Tong Yang Industry Co., Ltd.; TYG Products, L.P.; Jui Li Enterprise Co., Ltd.; Gordon Auto Body Parts Co. Ltd.; Auto Parts Industrial, Ltd.; and Cornerstone Auto Parts, LLC.*

**What is this lawsuit about?** Direct Purchaser Plaintiffs claim that during the Class Period, between January 1, 2003 and May 14, 2015, Defendants violated the United States federal antitrust laws by agreeing to fix prices and limit supply for AMSM. AMSM includes hoods, doors, bumpers, fenders, bonnets, floor panels, trunk assemblies, trunk lids, tailgates, roof panels and reinforcement parts. Defendants have denied and continue to deny each and all of the claims and contentions alleged by Direct Purchaser Plaintiffs, as well as all charges of wrongdoing or liability. The Court has not decided in favor of either Party.

Proposed Settlements have been reached with Tong Yang Industry Co., Ltd., Taiwan Kai Yih Industrial Co., Ltd., and TYG Products, L.P. for US\$16 million in cash, and Gordon Auto Body Parts Co. Ltd. (together “Settling Defendants”) for US\$9 million, which, after Taiwan taxes, will net US\$12.8 million and US\$7.2 million for a total of US\$20 million in a settlement fund (“Settlement Fund”). After deducting costs, fees and expenses, the balance of the Settlement Fund will be distributed to the Class on a pro-rata basis depending on how much you spent on AMSM during the Class Period from all the Defendants. The lawsuit will continue against the Non-Settling Defendants—Jui Li Enterprise Co. Ltd., Auto Parts Industrial, Ltd., and Cornerstone Auto Parts, LLC. You are included in the Class if you fit the following description: All persons and entities in the United States, and its territories and possessions, which purchased Aftermarket Automotive Sheet Metal Products directly from any of the Defendants between January 1, 2003 and May 14, 2015. **What are my options?** You have a choice of whether to stay in the Class or not. If you submit a Claim Form, file an objection or do nothing, you are choosing to stay in the Class, and you will be bound by the Settlement Agreements and Releases, as well as the Court’s orders and decisions in these Settlements and the action against the Non-Settling Defendants.

**Submit a Claim:** If you remain in the Class, you may be eligible to share in the Settlement Fund. You must complete and submit a timely Claim Form postmarked no later than **July 9, 2015** to Aftermarket Sheet Metal Settlement Claims Administrator, c/o KCC Class Action Services, P.O. Box 40008, College Station, TX 77842-4008. Claim Forms are available at [www.AftermarketSheetMetalSettlement.com](http://www.AftermarketSheetMetalSettlement.com), or by calling 1-866-413-5892.

**Exclude yourself from the Class:** If you want to keep your right to sue or continue to sue one or more of the Defendants on your own about the same issues in this case, you must exclude yourself from the Class. If you exclude yourself, you cannot get a payment from these Settlements and you will not be bound by the Settlements, the Court’s orders and judgments or anything that happens in the action against the Non-Settling Defendants. To exclude yourself, you must submit a written request for exclusion, postmarked by **June 29, 2015** to the Claims Administrator at Aftermarket Sheet Metal Settlement Claims Administrator, c/o KCC Class Action Services-Exclusions, 75 Rowland Way, Suite 250, Novato, CA 94945. More information regarding how to exclude yourself from the Class can be found in the Long Form Notice available at [www.AftermarketSheetMetalSettlement.com](http://www.AftermarketSheetMetalSettlement.com). **Object to the Settlements:** You may object to all or any part of the Settlements and give reasons why you think the Court should not approve them. Your written objection must be mailed to the Claims Administrator, Class Counsel, Counsel for the Settling Defendants, and the Court and must be postmarked no later than **June 29, 2015**. You may request to appear and speak at the Final Approval Hearings. You may have your own attorney attend, at your own expense, but are not required to. More information regarding how to object to the Settlements and to request to appear at the Final Approval Hearings can be found in the Long Form Notice available at [www.AftermarketSheetMetalSettlement.com](http://www.AftermarketSheetMetalSettlement.com).

**Do I have a lawyer in this case?** Yes, the Court appointed Jason S. Hartley of Stueve Siegel Hanson, LLP, and Vincent J. Esades of Heins Mills & Olson P.L.C. as Class Counsel to represent you and other Class Members.

**The Fairness Hearings.** The Court will hold the Final Approval Hearings beginning at 10:30 a.m. on August 14, 2015, at the United States District Court for the Eastern District of Wisconsin. At these hearings, the Court will listen to any objections and consider whether to approve each Settlement as fair, reasonable, and adequate; a request by Class Counsel for attorneys’ fees and expenses; and a service award of \$25,000 from the Tong Yang Settlement and \$10,000 from the Gordon Settlement to each of the Class Representatives (Fond du Lac Bumper Exchange Inc. and Roberts Wholesale Auto Parts Inc.). Class Counsel is requesting attorneys’ fees in the amount of no more than 33% of the Net Settlement Fund (that is, the Settlements amount after deduction of Taiwan taxes) and payment of litigation costs and expenses of not more than \$1.4 million. These costs and expenses include each law firm’s reported expenses and common costs to date. As the litigation continues, Class Counsel will incur more expenses and may ask the Court for an additional payment. Class Counsel’s motion for attorneys’ fees and costs and service awards will be available at [www.AftermarketSheetMetalSettlement.com](http://www.AftermarketSheetMetalSettlement.com), on June 9, 2015.

For more information, including the Long Form Notice and Settlement Agreements, go to [www.AftermarketSheetMetalSettlement.com](http://www.AftermarketSheetMetalSettlement.com), call 1-866-413-5892 or write the Claims Administrator at Aftermarket Sheet Metal Settlement Claims Administrator, c/o KCC Class Action Services, P.O. Box 40008, College Station, TX 77842-4008.

*Please do not call the Court or the Clerk of the Court. They cannot discuss the Settlements or continued action.*

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# The true cost **OF CYBER ATTACKS**

Recently there were a number of cyber attacks that affected many of the servers in our industry. Sometimes I think we consider ourselves unlikely to be affected because we don't have customer credit card numbers on file or any critical information stored where someone can get to it.

Personally I had my Starbucks account hacked through Facebook. I caught it before any real damage was done financially. The clown that did it left his email address in my account so before I had Starbucks change it I sent him an email with a virus that some other clown sent me about a thousand times. It was probably a fake email address but it made me feel better.

So the question that I want to pose for you to think about is what is the true cost of this cyber hassle?

Back to my Starbucks account. It took me more than four months to get my account to the point that I could reload my card without the assistance of a barista.

I had to call their customer service three times and they could not find a problem at the top support level. Finally after the third call the customer service rep pushed my problem to someone with higher security clearance into my account. Total time for the calls exceeded one hour, not to mention the multiple times I tried to call but could not get through before another phone rang in the office.

It might seem like my coffee habit has nothing to do with cyber security or customer service, but in my highly caffeinated state I think it does.

These seemingly



**DONNY SEYFER**  
Operations Manager  
Seyfer Automotive, Inc.

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“ The cost of supporting customers with hacked accounts ties up customer service reps. ”

small annoyances have costs far beyond the potential financial loss of the fraudulent transaction.

My relationship with Starbucks is not as warm and fuzzy as it used to be because they did not have the security through Facebook to differentiate between someone being me or a hacker, despite my credit card being attached to the account. Also, it is frustrating to be the customer and feel you have more of a handle on the problem than the ...**CONTINUE READING** □

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# Plan carefully when diversifying **YOUR BUSINESS**

The weather is nice, business is busy and everybody is hustling to get more done in a day than sometimes can be done. We have sore feet, sore eyes and sore backs, but our ego or sense of accomplishment is somewhat restored. This is the good season to be in the automotive parts and service business.

But a danger lurks if you, like me, have diversified your business so much to get you through the slow season and you failed to realize that all of those other things you delved into are also going to boom during the busy season.

To recap my entire business: auto parts jobber; full-service seven-bay modern garage; large U-Haul dealer; pre-fab building, shed and barn dealer; and a Dixie Chopper dealer/service repair facility. All of which, except the building dealership, are designed to drive parts and service through our core business. With such an amalgamation of businesses all under one roof, your core business might begin to mutate, and take on a life of its own.

That is what's happening with our business right now. We've always been a good parts store and service center, so it stands to reason that any other thing we do could possibly be considered egotistically able to achieve the same level of performance. But what happens if things break loose with a rush of business that harbors visions of the Hoover Dam bursting and you are downstream trout fishing in a rowboat? You are in for a ride, that's for sure.

Suffering from too much business? That's like complaining about being exceedingly handsome (I'm not, but often try to imagine). The floodgates have opened for every aspect of our business and we are struggling to keep up, and it's my fault for being unprepared. I'm about to explain why.

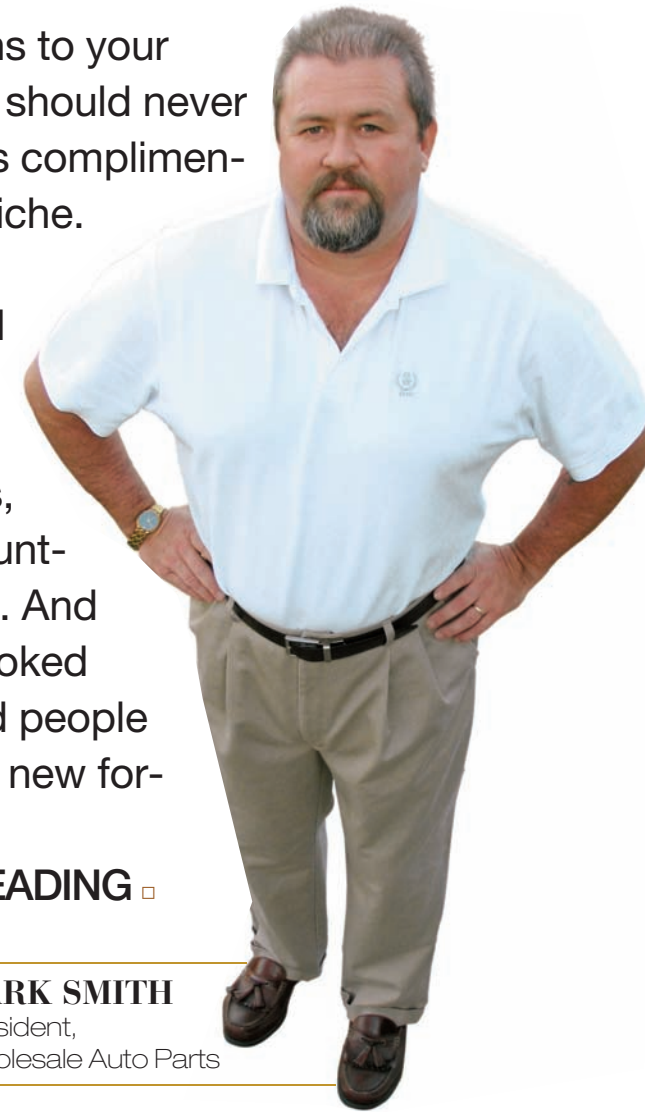
Diversification, or adding business segments to an auto parts store and service center are often thought of as like adding a bucket of beef jerky at the check out register. Truly, impulse items are good profit additions, but adding a rack of key chain flashlights does not require having a person

on staff that is a spectral engineer, nor does a display of disposable breakaway knives require the skills of a swordsman's unique salesmanship.

Major additions to your business lineup should never be thought of as complimentary, quirky or niche. Major additions require an equal amount of infrastructure in regards to sales, inventory, accounting and support. And the most overlooked thing is qualified people to manage your new forays.

...CONTINUE READING ▢

**MARK SMITH**  
President,  
Wholesale Auto Parts



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# Proposed lower ozone ceiling **DIVIDES AFTERMARKET**

Various sectors within the auto aftermarket are pushing the Environmental Protection Agency (EPA) in different directions with regard to a new ozone standard.

Last December, the EPA proposed lowering the ozone standard, last set in 2008, from its current 75 parts per billion (ppb) to between 65-70 ppb. Emissions of nitrogen oxide (NOx) and volatile organic chemicals (VOCs) mix when exposed to sunlight to form ground-level ozone, also known as smog. The Clean Air Act requires the EPA to consider changes to an air standard every five years, and the agency has already missed that deadline for ozone.

The auto industry will be affected because cars emit nitrogen oxide, and service stations use brake cleaners and other solvents containing VOCs, which they purchase from retailers or wholesalers. Cities and counties whose ozone levels exceed a standard must come up with strategies to lower those levels, or risk losing federal highway funds. Common strategies are requiring retailers to sell reformulated solvents, upgrading service station inspection and maintenance programs and upgrading statewide aftermarket catalytic converter requirements.

The Manufacturers of Emission Controls Association (MECA) said the California aftermarket catalytic con-

verter standard, established in 2009, could be adopted by the EPA as a federal standard, thereby substantially driving down tailpipe emissions of nitrogen oxide. The MECA favors a new 65 ppb ozone standard.

On the other hand, both the Auto Care Association and the National Automobile Dealers Association (NADA) want the standard kept where it is. NADA says its members are already doing their part by using lower solvent content brake cleaners, windshield washer fluids, etc. In addition, dealerships with autobody shops now comply with rules limiting the solvent content of body shop paint systems.

“Together, these steps have significantly reduced ozone-producing emissions from dealership service and autobody operations,” says Douglas I. Greenhaus, chief regulatory counsel, Environment, Health, and Safety, NADA.

Greenhaus points out that the EPA has not even implemented the 2008 standard fully. The agency is just now setting deadlines for states to submit state implementation plans, called SIPs, which lay out which strategies a state will use to lower emissions of NOx and VOCs in what are called non-attainment areas.

Currently, 227 counties are designated as non-attainment for the 75 ppb standard. Under the proposed rule the EPA issued last December, the number of counties designated as non-attainment would rise to 358 under the 70 ppb standard and to 558 under the 65 ppb standard.

Jackie Ploch, air and noise work leader for the Texas Department of Transportation,...**CONTINUE READING**



**STEPHEN BARLAS**  
Washington Correspondent



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# The changing face OF THE JOBBER INDUSTRY

The paint jobber industry is undergoing significant change. Increasing customer concentration in the collision industry is putting pricing pressure on the entire refinish materials supply chain.

A second round of jobber consolidation is now underway adding competitive pressure within the industry. Adding to these pressures, paint manufacturers are placing ever more start up, technical and back office requirements on jobbers in an attempt to drive efficiency and lower costs. Combined, the result is a jobber industry that is undergoing and will continue to undergo significant change.

Consolidation in the collision repair industry is hot news. Backed by billions of dollars of private equity investments, the collision repair industry is witnessing what may be a once in a lifetime transformation. In 2014 alone more than \$800 million in revenues were acquired by the four largest collision repair companies in the country. In a few short years these same nationwide collision repair operators have doubled their market share. The pace of consolidation in the collision industry is projected to increase exponentially.

As the collision market becomes more concentrated,

the impact on companies that sell into the industry becomes more apparent. The jobber industry in particular has seen a shift in the way business is conducted. As larger collision repair companies have taken more market share they have become more demanding on both price and operational integration, creating a fear in the industry that paint distribution is becoming a commoditized business.

Selling to a large multi shop operator (MSO) is different than selling to a traditional single or dual location business. Large MSO's are focused on price first and value added services second. Many of the largest MSO's are able to buy direct and negotiate nationwide sales agreements at steep discounts. In conjunction with an increased focus on price, there are also increasing demands that the jobber deeply integrate their business operations with the MSO. There is a particular focus on KPIs and ensuring the jobber is performing as agreed. In return, jobbers servicing the largest collision repair operators in the industry earn gross margin on delivered product in the 5 percent to 8 percent range.

Selling high volumes at low margins alters the way business has traditionally been conducted in the mar-

ket. For large distribution companies with already existing investments in inventory, sales and distribution staff, equipment and facilities, selling to a large regional account can prove to be a lucrative opportunity. In exchange for selling at low margins, many MSO's demand less in the way of costly value added services that smaller customers require.

Large MSO's tend to have their own technical experts on staff and demand substantially less support. Jobbers serving this market engage in traditional distribution, essentially becoming drop shippers that add value by closely integrating operations with large MSO's as opposed to providing technical and operational support.

While consolidation continues to impact the collision market, ...CONTINUE READING

“ Consolidation creates a fear that paint distribution is becoming commoditized. ”



BRAD MEWES  
Managing Partner, Supplement!

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## How do you **EXPAND YOUR OUTREACH?**

In today's global economy, aftermarket suppliers must explore international markets to expand their business around the world. Exporting products and components to serve customer needs worldwide is key to suppliers' success – but determining what markets are best for their products is a challenge.

Since 1923, North American aftermarket suppliers have had a valuable partner in creating global business opportunities: Overseas Automotive Council (OAC) of the Automotive Aftermarket Suppliers Association (AASA), the light vehicle aftermarket division of the Motor & Equipment Manufacturers Association (MEMA).

The OAC's latest initiative is the development of a series of trade missions in key international markets certified by the U.S. Department of Commerce (DOC). Certified trade missions are hosted by Department of Commerce's Commercial Service overseas offices. These meetings bring representatives of U.S. companies into contact with potential agents, distributors, joint venture partners, licensees, local businesses and government contacts.

A typical DOC Certified Trade Mission includes:

- one-on-one business appointments
- market briefings

- networking receptions
- selective sessions on local business practices, site visits, or seminars

Top aftermarket supplier industry leaders from AASA and OAC are conducting ongoing meetings with representatives of the DOC in Washington, D.C. to discuss further collaboration between the associations and the agency, and lay the groundwork for future DOC-certified trade missions.

"Our goal is to support our AASA and OAC members by helping them export in new parts of the world and I believe partnering with the Department of Commerce is a step in the right direction," said OAC Chairman Mick Jordan, vice president of marketing at Cloyes Gear & Products Inc., who is spearheading this project.



“The latest initiative is the development of trade missions in key international markets.”

More information about OAC's planning of trade missions throughout the globe will be announced soon. For more information about the trade missions, OAC, its programs and events, visit [www.oac-intl.org](http://www.oac-intl.org) or contact Ben Brucato: [bbrucato@aasa.mema.org](mailto:bbrucato@aasa.mema.org).

*Editor's note: AASA exclusively serves manufacturers of aftermarket components, tools and equipment, and related products, which support 710,000 employees in the United States. AASA promotes a collaborative industry environment, providing a forum to address issues and serving as a valued resource for members. MEMA represents more than 1,000 companies that manufacture components and systems for use in motor vehicles and equipment in the light vehicle and heavy-duty, on- and off-highway commercial vehicle markets for the original equipment and aftermarket industries. Motor vehicle component manufacturers are the nation's largest manufacturing sector with a total employment impact of 3.62 million employees. For every direct job in the motor vehicle supplier industry, another five jobs are created. For more information, visit [www.mema.org](http://www.mema.org).*

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# ONE STEP AT A TIME

SHOP OWNERS GRADUALLY ADOPTING ONLINE PURCHASING

BY BRUCE ADAMS | Managing Editor



PHOTO COURTESY: THINKSTOCK

Auto service and repair shop owners and technicians are becoming less reluctant about using online purchasing methods to buy auto parts, according to the *Aftermarket Business World* 2015 Online Purchasing Habits Study.

Only 35 percent of this year's respondents said they use neither a smart phone nor a tablet at work to order parts, compared to 44 percent in the *Aftermarket Business World* 2014 Online Purchasing Habits Study. Similarly, those who said they never make online purchases dropped from 39 percent in last year's study to 36 percent in the 2015 study.

They also appear to be paying more attention to online product reviews of the parts they order. In this year's study 22 percent of respondents said online reviews were "very important" compared to 19 percent who answered the same way in the 2014 study. Respondents who replied "not important at all" dropped from 33 percent in last year's study to 31 percent this year.

The number of respondents using online searches to find auto parts retailers' e-commerce websites increased from 32 percent in the 2014 study to 39 percent in 2015.

Respondents said what they dislike most about ordering auto parts online is the "potential to order the wrong part" (35 percent) and "shipping costs" (25 percent).

On the positive side, respondents said they like the ease of comparing prices and options the most (27 percent), and like the convenience and the wide range of product availability second most (each at 19 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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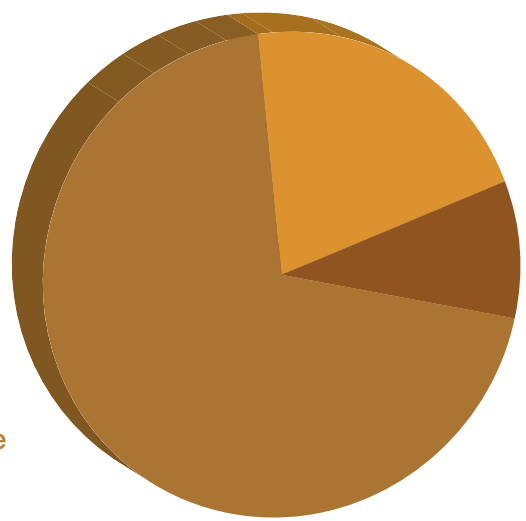
## Water Pumps

### Frequency of online water pump purchases

0-10% of the time	28%
11-25% of the time	7%
26-50% of the time	5%
51-99% of the time	12%
All the time	9%
Never	39%

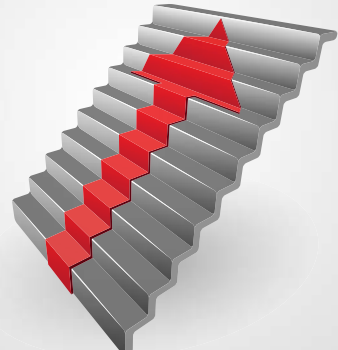
### App usage for online buying

**21%** Would consider using  
**9%** Already use  
**70%** Would not use



**34%** find online retailers through an online search when looking to purchase water pumps online.

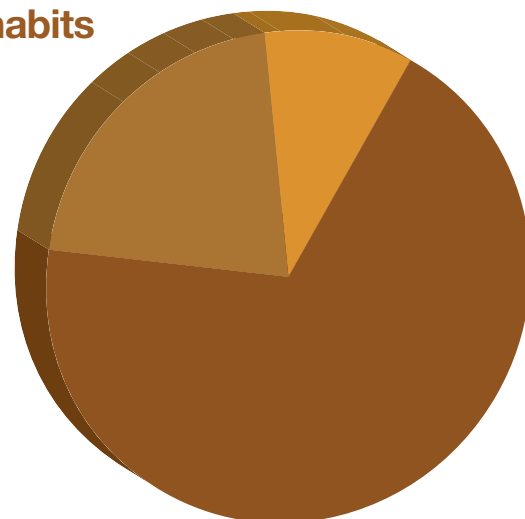
# ONE STEP AT A TIME



**35%** of respondents say they dislike most the potential to order the wrong part when purchasing water pumps online.

### 2015 vs. 2014 online buying habits

**10%** Purchased more  
**69%** Purchased the same  
**21%** Purchased less



### Reasons for buying water pumps online

Ease of price comparing	20%
Convenience	20%
Product availability	22%
Speed	7%

### Importance of online product reviews

Very important	22%
Important	18%
Somewhat important	22%
Not important at all	38%

**61%** reported they **WOULD NOT BE ENTICED** by online coupons, rebates, QR codes or other incentives to purchase more water pumps online.

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# Auxiliary Lighting

## Frequency of online auxiliary lighting purchases

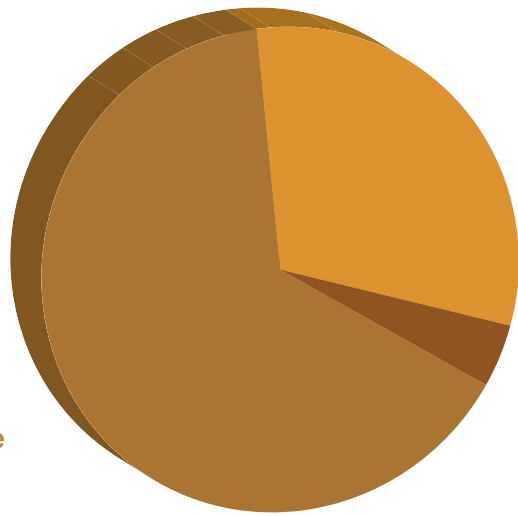
0-10% of the time	44%
11-25% of the time	9%
26-50% of the time	5%
51-99% of the time	6%
All the time	2%
Never	34%

## App usage for online buying

**31%**  
Would consider using

**4%**  
Already use

**65%**  
Would not use



**47%** find online retailers through an online search when looking to purchase auxiliary lighting online.

# ONE STEP AT A TIME



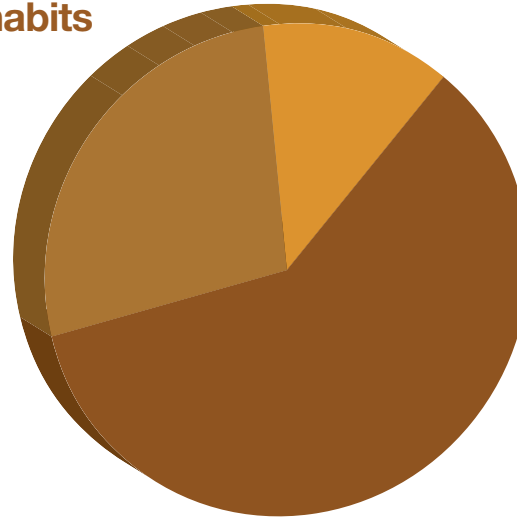
**35%** of respondents say they dislike most the potential to order the wrong part when purchasing auxiliary lighting online.

## 2015 vs. 2014 online buying habits

**13%**  
Purchased more

**60%**  
Purchased the same

**27%**  
Purchased less



## Reasons for buying auxiliary lighting online

Ease of price comparing	33%
Convenience	17%
Product availability	17%
Speed	5%

## Importance of online product reviews

Very important	22%
Important	25%
Somewhat important	31%
Not important at all	22%

**53%**  
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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# Wheel Bearings

## Frequency of online wheel bearing purchases

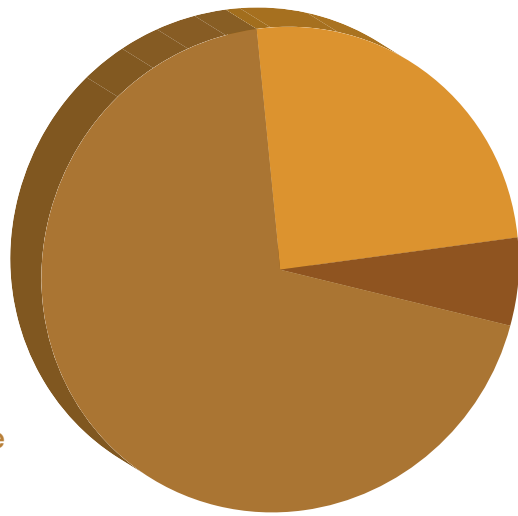
0-10% of the time	25%
11-25% of the time	11%
26-50% of the time	8%
51-99% of the time	12%
All the time	9%
Never	35%

## App usage for online buying

**25%**  
Would consider using

**6%**  
Already use

**69%**  
Would not use



**34%** find online retailers through an online search when looking to purchase wheel bearings online.

# ONE STEP AT A TIME



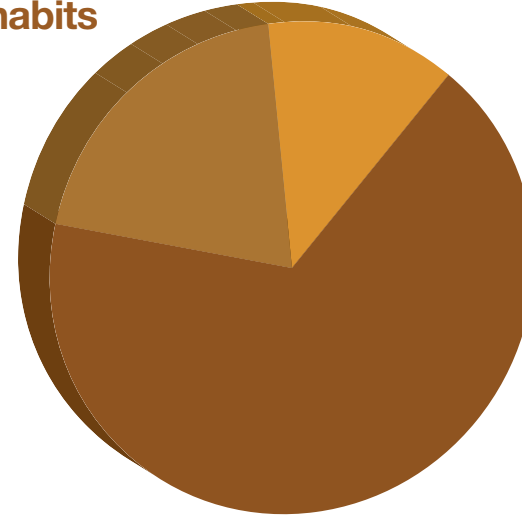
**34%** of respondents say they dislike most the potential to order the wrong part when purchasing wheel bearings online.

## 2015 vs. 2014 online buying habits

**13%**  
Purchased more

**67%**  
Purchased the same

**20%**  
Purchased less



## Reasons for buying wheel bearings online

Ease of price comparing	25%
Convenience	22%
Product availability	18%
Speed	6%

## Importance of online product reviews

Very important	24%
Important	16%
Somewhat important	26%
Not important at all	34%

**59%**  
reported they

## WOULD NOT BE ENTICED

by online coupons, rebates, QR codes or other incentives to purchase more wheel bearings online.



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