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SEPTEMBER 2015

# SPANISH AFTERMARKET IS MATURE, WELL-DEVELOPED

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# SPANISH AFTERMARKET IS MATURE, WELL-DEVELOPED

BY RICHARD MEZADURIAN | Contributing Editor

Since the 2nd Century B.C., Hispania, as it was then known, has had a diverse and unique multicultural flavor that was founded on trade.

Greeks, Romans, Celts and many others contributed to what was the early development of modern Spain.

Today, Spain is a country of 46 million people, and a significant member of the European Union. While the country has embraced the 21st Century with modern industries and infrastructure, you don't have to look far to find

vestiges of the old ways. Throughout most of Spain, ancient traditions like the afternoon siesta are still observed, and for the most part are a cherished part of the culture. But traditions aside, Spain has embraced modern living, and automobiles are a big part of the economy and the daily lives of most Spaniards.

Spain's gross domestic product (GDP) of approximately US\$1.56 trillion is good for 16th

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## Analysis by market

### REPLACEMENT

**Vendors:** Mcity proving ground mimics real road conditions for connected cars.

### EMERGING

**Technology:** Software upgrades streamlines distributor's operations.

### INTERNATIONAL

**Vendors:** Automakers collaborating to contain costs, advance technology.

### CUSTOMERS

**Dealers:** NHTSA is under fire for its recall management processes.

## Research

**Tire Dealer Study:** See the latest Aftermarket Business World study examining the buying habits of service repair shops that sell auto tires.

## Online Special Reports

### FROST & SULLIVAN

**The value of e-commerce:** Growth in global sales of connected cars will create a large pool of aftermarket retailers that design products in line with the latest technologies.

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# Spanish aftermarket

“ The Spanish independent aftermarket looks like a two-step distribution model in the U.S. ”

place in the world. This puts their economy roughly on par with that of Canada, but with nearly twice the population. Spain's economy and banking sectors were hit hard by the Great Recession. Housing values took a steep tumble in 2009, and the market has yet to fully recover. Spain is often cited, along with Greece, Ireland and Italy, as the trouble spots of the Eurozone. Spain has significantly less sovereign debt than Greece, and it is widely acknowledged that the greatest period of risk has already passed. But the situation continues to improve daily.

A continued European recession has hit Spain's biggest industry, tourism, particularly hard. With Europeans tightening belts since the recession hit, Spain's GDP shrank from 2008 through 2013. This was mostly a result of decreased tourism demand and a steep decline in home building in the vacation home sector of the economy. Spain's economy is weighted towards services, with 70 percent of the economy being services related. Only 24 percent of Spain's GDP is manufacturing related.

However, Spain is the second largest producer of motor vehicles in Europe, with more

than 2 million units produced annually. From a new car sales perspective, Spain's automotive recovery has already begun. According to the European Automobile Manufacturers Association (ACEA), new light vehicle sales were up more than 22 percent in the first four months of 2015, and commercial truck sales growth of 35 percent led all of Europe during the same period.

In 2014, the economy began to grow again, albeit at a slow 1.4 percent rate. This has impacted the growth of the motor vehicle population, which remains at about 27 million cars, trucks and motorcycles. Prior to the Great Recession U.S. exports of auto parts and accessories totaled more than US\$266 million. By 2009, that number had fallen to just over US\$113 million. Since then, U.S. exports have begun to climb again. In 2012, U.S. exports of auto related parts and accessories totaled just over US\$160 million, and that number is expected to grow by about 3 percent to 5 percent a year.

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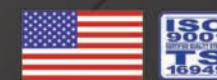


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4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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# VENDORS

## Automakers collaborating to contain costs, advance technology

BY JAMES E. GUYETTE  
News Correspondent

While still retaining separate and competitive showroom ledger sheets and parts distribution channels, global automakers are increasingly setting rivalries aside by forming mutually beneficial development deals. These alliances are designed to mitigate the costs and complexities of meeting varied international regulatory requirements and converting the latest automotive innovations into marketable vehicle platforms.

### TRENDS & MARKET Analysis

Toyota and Mazda are in the process of leveraging their respective resources via an agreement to “complement and enhance” each OEM’s products and technologies.

Although a joint committee is currently evaluating and negotiating the exact terms of the cooperative efforts, consolidations and closures are unlikely to occur among American sales out-

### Vendor Newsmaker

## Q&A

**BAILEY OVERMAN**  
Senior Analyst, Automotive  
Aftermarket Suppliers Association



**Q** What are some key international and domestic business trends reported in the AASA Supplier Benchmarking Survey?

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

[Read full interview](#)

lets and their component distribution networks, according to Mazda spokesman Nick Beard.

“It’s not a sales partnership, so it won’t have any impact on our dealerships,” Beard says.

“This partnership is very new and thus the details are still being worked through,” yet

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Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

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“FirstElement Fuel will assist in installing 20 hydrogen fueling stations in California this year.”

the flow of replacement parts from the two Japanese automakers is expected to remain intact without significant changes.

Prior joint endeavors involved the licensing of Toyota's hybrid technologies to Mazda and the production of compact cars for Toyota at Mazda's plant in Mexico.

“The previous projects were individual projects relating to specific regions, products and units. This new partnership aims to build medium- to long-term synergy focused on the concept of creating new value for cars,” says Toyota spokeswoman Toni Honsowetz. “For example, the major differences include the possibility of expanding the scope of collaboration without placing limits on regions or technical areas, and the possibility of creating new technologies and products beyond the mutual supply of existing products and technologies.”

The anticipated attributes, she says, address:

- development methods that make effective use of limited resources;
- brand design incorporation and application to various models;
- plant investment that is suited to the actual

- conditions in intended locations;
- further improving driving pleasure as well as environmental and safety performance;
- building a complementary relationship that goes beyond the framework of conventional cooperation;
- not placing limits on regions or technical areas; and
- improving manufacturing capabilities in Hiroshima and further revitalizing local industry.

A dispatch from Reuters, citing two unnamed insider sources, reports that Toyota is considering providing Mazda with its fuel cell and plug-in hybrid technology. Mazda is contemplating sharing its proprietary SkyActiv series of fuel-efficient gasoline and diesel engine technologies.

At the 2015 Consumer Electronics Show, Toyota announced that it is inviting royalty-free use of some 5,680 fuel cell vehicle (FCV) patents, including key technologies developed for its new Mirai FCV model.

“The first generation hydrogen fuel cell vehicles, ...CONTINUE READING □

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# VENDORS

## Mcity proving ground mimics real road conditions for connected cars

BY JAMES E. GUYETTE  
News Correspondent

Numerous industry suppliers are joining together to help sponsor a new \$6.5-million one-of-a-kind test track and related research programs aimed at perfecting connected and automated vehicles with the goal of bringing them to the mainstream automotive marketplace as quickly as possible.

### TRENDS & MARKET Analysis

Known as Mcity and operated by the University of Michigan's Mobility Transformation Center (MTC), the site is a 32-acre simulated urban and suburban environment featuring a series of roads complete with intersections, traffic signs and signals, streetlights, building facades, sidewalks and construction obstacles. It provides a proving ground for current connected and automated vehicle applications along with providing a cooperative environment for exploring future technologies.

More articles by **JAMES E. GUYETTE**

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## Q&A

**PETER SWEATMAN**  
Director, University of Michigan  
Mobility Transformation Center



**Q** What is the potential for aftermarket vehicle intelligence applications?

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

[Read full interview](#)

"We feel that the level of research and the opportunity for collaboration offered through Mcity is necessary to reach our goal that the intersections of the future are collision-free and safer for all roadway users," says Gary Duncan, chief technology officer at the Econolite Group,

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Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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“Connected vehicle technology has the potential to avoid most serious crashes when deployed.”

which is among the project’s array of investors.

The company conducted a demonstration of its recent developments at Mcity’s July grand opening ceremony. DENSO, Delphi, Bosch and other sponsoring vendors also did demos at the event. Additional corporate Mcity supporters include BorgWarner, TRW, Qualcomm, AGC Automotive, Arada Systems, Brandmotion, Calspan, DURA Automotive Systems, Faurecia, Iteris, Harman, Hitachi, State Farm, the AAA, Ford, General Motors, Toyota, Honda, Nissan and China’s Changan Automobile.

“Connected and automated vehicles hold the potential to dramatically improve the safety, sustainability and accessibility of our mobility system,” says MTC director Dr. Peter Sweatman, citing the ongoing importance of industry involvement with the school’s Affiliates Program, which has 27 initial member firms. “Through this consortium arrangement, we seek to engage the range of cutting-edge technology suppliers, thought leaders and entrepreneurs required to inform and drive progress toward that transformative vision.”

A broad range of affiliated sectors are repre-

sented, such as auto manufacturing, vehicle communication devices, chips and hardware, insurance, advanced modeling, big data acquisition and intelligent transportation systems.

“Only by bringing together partners from these sectors as well as from government will we be able to address the full complexity of the challenges ahead as we all work to realize the opportunities presented by this emerging technology,” Sweatman says. “I am thrilled with the diversity and global reach of the new ecosystem of companies and agencies we have created. Our founding Leadership Circle provides a unique nucleus for collaboration, deployment and rapid learning in connected and automated mobility.”

The Affiliate Program complements the 14 Leadership Circle companies that have each committed a total of \$1 million over three years to the MTC and its programs. Support is also coming from the Michigan Department of Transportation (MDOT) and the Michigan Economic Development Corp. (MEDC).

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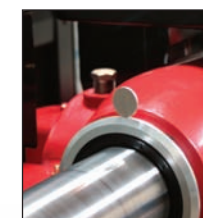
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Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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# DEALERSHIPS

## NHTSA is under fire

Safety agency subject of report critical of its recall management processes

BY BRIAN ALBRIGHT  
Correspondent

The explosion in automotive safety recalls has cost automakers billions of dollars, and put the industry under increased scrutiny. Now the agency tasked with managing those safety recalls, the National Highway Traffic Safety Administration (NHTSA) has come under fire for what a new report characterizes as dysfunction and mismanagement of automotive recalls.

TRENDS & MARKET Analysis

In June, the Transportation Department Inspector General's Office issued a blistering report that criticized NHTSA for failing to hold automakers accountable for safety issues, not training or supervising staff, and failing to open safety investigations.

At a hearing before the U.S. Senate Commerce Committee that month, senators threatened to cut off NHTSA's funding unless there were significant reforms.

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Dealer Newsmaker

### Q&A

STEVEN SZAKALY  
NADA  
Chief Economist



Were there any surprises in this year's NADA DATA report on dealership trends and financial performance?



What did Szakaly say? Continue reading online.

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"This isn't about resources. This is about blatant incompetent mismanagement," said Sen. Claire McCaskill (D-Mo.) during the hearing. "You can't start throwing money until you have a system in place to make this agency function like it's supposed to."



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SEPTEMBER 2015

Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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“NHTSA’s ODI declined to investigate the GM air bag issue in 2007, without documenting why.”

The report was spurred, in part, by the agency’s handling of the General Motors ignition switch recall.

According to the report, just one screener working four hours per day handles the hundreds of complaints the agency receives each day, and 90 percent of those complaints are ignored. NHTSA’s Office of Defects Investigation (ODI) lacks the good data and detailed guidance on the information that manufacturers and consumers should report to the agency.

The report also found that “ODI does not follow standard statistical practices when analyzing early warning reporting data, such as establishing a base case for what statistical test results would look like in the absence of safety defects. Consequently, ODI cannot differentiate trends and outliers that represent random variation from those that are statistically significant.”

ODI has not developed consistent guidance on when to open an investigation, and the investigations lack transparency and accountability. Of the 56 investigation proposals for light vehicle safety defects in 2013, 32 were

not investigated, and 18 of those lacked any documented justification for not investigating.

In fact, the ODI did not investigate or adequately monitor GM air bag non-deployment and ignition switch issues because of those types of failures. ODI declined to investigate the GM air bag issue in 2007, without documenting why the agency came to that conclusion.

The report concludes with 17 specific recommendations for NHTSA, including improving early warning reporting data, developing internal guidance on the use of oversight and enforcement tools, providing better guidance for consumer complaints, instituting a quality control process to ensure complaints are reviewed correctly, and improving investigation procedures.

NHTSA Administrator Mark Rosekind told the Senate panel that the agency is responding to 10 of the 17 recommendations in the inspector general’s report, and that all of them will be completed by June 2016.

In early June, NHTSA announced reports outlining changes the agency adopted to  
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SEPTEMBER  
2015

Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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# TECHNOLOGY SOLUTIONS

## Software upgrade streamlines ops

Distributor is able to quickly create new reports and track deliveries

**BY BRIAN ALBRIGHT**  
Correspondent

The time and expense involved in upgrading business management software often causes companies to avoid a much-needed upgrade for too long. That has real consequences, as older software platforms aren't able to keep up with new technology advancements, which deprives companies of the benefits of those new technologies.

### TRENDS & MARKET Analysis

Oregon-based Automotive Service Parts (ASP) recently upgraded its business software, allowing the distributor to improve efficiency, provide better visibility into sales and inventory, and enhance its delivery operations.

ASP was formerly Eugene Service Parts, an independent auto parts warehouse distributor in Eugene and Medford, Ore. It has been in business since 1974. The com-

pany started as a repair shop and automotive service center, and then branched out into parts distribution in the late 1970s. The company then acquired another local distributor. ASP now operates two warehouses, along with a service center and machine shop, and has 66 employees. ASP operates as a two-step distributor.

Originally, ASP used Epicor's Prism solution. The business ran on that platform until 2014, when the company implemented Epicor's Vision system and Epicor Compass analytics software. The company simultaneously deployed a GPS-based vehicle tracking system to help track deliveries.

"We had known we needed to move to a different platform for a while, but we stuck with Prism because it was easier and less expensive than upgrading," says vice president and co-owner Gary Davis. "But we needed a system that was more compatible with general computing. We wanted to be able to do things faster, and

do things in Excel and then move the data back into the system. It was cumbersome to do that with the old platform."

For larger product lines, it was difficult for the company to run any type of report or create tracking spreadsheets. "We just needed to break an old habit," Davis says. "It's hard to shake everybody up when you're in business. People get comfortable with the way they do things. When you change the software, you're really going to rock their world."

### Better data analysis

The updated software has streamlined several operations, and enabled new functionality. When orders are called in to the company's call center, a parts list on the invoice is printed at the warehouse. Warehouse staff pull the parts and take them to a sort table, where they are scanned to match each invoice.

“Drivers call the warehouse when they are five minutes out to signal the dispatcher.”

### Technology Newsmaker

#### Q&A

**SARAH ALBRIGHT**  
Senior Public Relations Coordinator  
Mishimoto Automotive



Explain how Mishimoto Automotive is using 3D printing? What are some of its key benefits?



What did Albright say? Continue reading online.

[Read full interview](#)

Drivers call the warehouse when they are five minutes out from arrival, which serves as a signal for the dispatcher to scan their runs. The parts are placed in a cart by the dock door with each driver's name attached. As soon as they arrive, they can ...CONTINUE READING ▢

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SEPTEMBER 2015

Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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# Digital copyrights are **CHALLENGING TO AFTERMARKET**

In the aftermarket and on computer programming forums we are talking a lot about the same subject – digital copyright. It is a complex issue and all I can hope to accomplish in this space is to ask some questions and present a few of the issues. You need to think about it and understand where you stand because the entire issue is made up of slippery slopes.

You may have read something on a blog about how the auto manufacturers don't want you to own the software on your car. Fundamentally, as I understand it, that is true. They want to grant you a license to use the software as long as you own the car.

What I find so curious is that the guys getting excited about this online are computer programmers. The operating systems they use with the exception of Linux and its variants work just like this. Windows and Mac OS are licensed for your use. They are not yours to reverse engineer. In this respect the OEMs are the same as computer software companies. There are lots of open source applications on the Internet but even those generally have rules that if you make a modification you agree to share that with the community of developers.

So why are the OEMs so concerned about folks reverse engineering their vehicle software? To answer this completely is outside of my scope and quite probably my knowledge, but I can give you one example that should help to clarify it. First, keep in mind that a large percentage of the software used on cars is not directly developed by the OEMs; it is actually developed by suppliers with names you would probably recognize – more on this later.

To simplify vehicle production and keep costs down many electronic components of a car are the same from base model

to top of the line and across platforms. The difference in operation occurs when the software is installed effectively turning on or off features that go with the configuration of the car. By buying a whole bunch of the same widgets rather than a smaller number of different widgets, a savings is realized that keeps the overall cost of the additional technology that is stuffed into every crevice of cars from making the cost of entry too high.

If someone were to break down that code and figure out what switches to turn on they could add features to a base model that were not paid for. If OEMs have to defend against that we will get ...**CONTINUE READING** □



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



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Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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# So, you got yourself **A CODE READER**

**B**eing an automotive jobber store has sure changed throughout the years. Those jobbers that did not adapt with the changing times are gone. That's not unique to our business. Independent jobbers today are faced with a very complex set of circumstances to deal with, and most of us are coping, adapting and changing.

Independent service and repair facilities also are faced with complexity that surpasses even the jobber stores' tribulations, but for whatever reason, an alarming percentage of the independent service centers refuse to adopt new technology or take advantage of training. More importantly, they do not readily grasp the importance of informing themselves or their employees how the vast library of knowledge available via various forms, will impact their bottom line.

The rest of the automotive aftermarket is motor-boating along, only to be slowed by the anchor of seeming indifference exemplified by a large number of independent repair shops. Copy this article, and hand it out to your independent repair shops and service centers, because the stories and points I'm about to share might just shame them into getting some new technology or going to a few classes.

A simple query is in order: Why are many independent shops and their technicians not attending classes and training seminars? For my technicians and countermen it's mandatory. Period, end of discussion. Federal-Mogul just held a regional seminar that we traveled 75 miles to attend. A recent Snap-

On Tools Diagnostic seminar required travel of more than 100 miles, and guess how many of my customers that are dealers, repair centers and garages attended? One. Us. I was not surprised, after all, they are my customers.

I asked one of my larger customers why they didn't send one tech, just one? The answer was even more astounding, "We've got a handheld code reader and the Internet, so all the information we need is available to us for free. We didn't feel like it would be worth our time, plus if we have a problem we can't solve, we just ask you."

I almost snort-laughed, then I asked, "How much time do you spend or your techs waste before you get to the point of calling us? Do you get to bill for all of that time scratching your head? What if I'm too busy to help your techs diagnose the problem?" His retort, "Well we just send them to you or a dealership because you usually can't make much money on goofy stuff anyhow." I was speechless, and it



**MARK SMITH**  
President,  
Wholesale Auto Parts

“Retail parts stores and code readers don't mix well.”

takes a very dumbfounding experience for me to be left with nothing to say.

Oil and water don't mix. Retail parts stores and code readers don't mix well either. Even worse, the fact that they use code readers openly and freely for many customers furthers the public perception that code readers are magical tools. ...CONTINUE READING □



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SEPTEMBER 2015

Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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# EPA, NHTSA truck proposal FACES HOT DEBATE

“The rule does not address the potential of new technologies to reduce emissions.”

Truck manufacturers, truck fleet owners and their trade groups greeted the Obama administration’s new proposal on fuel emissions with some trepidation.

They support reduction of greenhouse gas (GHG) emissions and improvements in gas mileage, which save employers and owners money, as long as the pay-back for the new technology is not too onerous, and the standards are achievable for manufacturers.

But while the proposed joint rule from the Environmental Protection Agency (EPA) and the National Highway Traffic Safety Administration (NHTSA) give manufacturers leeway as to what emissions and engine refinements to use to get to certain GHG/CAFE levels, there are doubts in some quarters about the accuracy of the agencies’ evaluation of the readiness of some technologies.

The proposed rule issued in mid-June exceeds 1,300 pages, not counting about 4,000 additional pages in regulatory impact and environmental analysis.

Glen Kedzie, vice president, Energy and Environmental Counsel of the American Trucking Association, uses the example of waste heat recovery,

which the EPA is depending on to some extent for its promise of reducing engine carbon emissions.

“That probably has the most question marks attached to it,” explains Kedzie. Manufacturers who utilize that not-yet-ready-for-prime time technology may have to make changes to the configuration of the engine compartment; and the systems will certainly add weight to the truck.

The proposed rule does not address the potential of aftermarket technologies to improve emissions reductions and CAFE improvements. That’s because all the weight of meeting compliance deadlines for trucks fall on the truck manufacturers, not the fleets. Those deadlines in the proposal are 2021, 2024 and 2027. There are other deadlines for engines, and others for trailers.

But Kedzie and others think the EPA and the NHTSA should ease the carbon reduction and mileage improvement goals to account for aftermarket improvements a fleet makes on its own. He uses idle reduction devices as an example.

“How do we draw the bridge so manufacturers can get credit for those savings,” he asks? “The EPA has market penetration rates for idle reduction, lightweight components and low-rolling resistance tires, which

are the kinds of things truckers could add to their equipment, and for which the manufacturers should get some credit, which would ease their burden of meeting the standards.

“The agencies are open to listening to including counting aftermarket improvements if we can give them an approach they would be comfortable with including in the final rule,” Kedzie said.

These would be the second round of truck standards. The Phase 1 program was announced in 2011 and covers new trucks and heavy vehicles in model years 2014 to 2018. These are heavy-duty pickup trucks and vans starting at a gross vehicle weight rating of 8500 pounds, which is class 2b and

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**STEPHEN BARLAS**  
Washington Correspondent

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Battery Chargers Wirthco

Water Pumps GMB



Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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# Calling winners and losers IN E-COMMERCE

“Products consumed daily and replenished regularly are low-hanging fruit for e-commerce.”

If you've followed this column for the past several months you might get the idea that everyone is selling to everyone else online, and those who aren't are doomed. But, that's not exactly true. The winners and losers in the age of digital distribution will be distinguished by what they sell as much as how they sell.

We recently noted the relaunch of the Amazon B2B venture called Amazon Business. In this iteration, they claim that “hundreds of millions of products” will be available with free two-day shipping on orders of \$49 or more and business features including purchase order management and work flows.

With that many products it would be easy to conclude they will be equally successful across all categories. But, not all categories are created equal. And that is the first indication of who in the auto care industry will be most threatened by the emergence of this B2B juggernaut.

Traditional automotive and light truck parts have several unique qualities that amount to defensive castle walls around the current channels of distribution. Same-hour delivery requirements, vast applications parts catalogs and field representation are the required characteristics of automotive product distribution. The

most successful parts brands invest in factory sales representation or knowledgeable rep agencies. Further back-up and product support is often available through telephone and online technical call centers. Installation instructions, product marketing collateral and comprehensive application fitment catalogs are all part of the defensive strategies full service suppliers must support to market effectively to the service professional or avid do-it-yourselfer. Annually, distributors and retailers spend millions promoting their brands and creating customer loyalty. Taken together, these programs have served to set apart traditional hard parts and service categories from most other products online.

Amazon, and most pure-play online distributors, are poorly suited to compete in product categories where delivery time is critical, proper application fitment is essential and a depth of technical support and product expertise is valued. Call most traditional parts categories winners.

When you think about what automotive categories lend themselves to online commerce by a generalist like Amazon or eBay, it's logical to think of those with lower timeliness of delivery requirements, non-applica-

tion parts and less complex products with lower needs for technical support – in short, commodities.

Look around an automotive service shop or collision repair center and you'll see the storeroom is full of consumables, shop supplies, tools and light application products (lighting, fuses, wipers, etc.) Products that are consumed daily in hundreds of thousands of locations and replenished at regular intervals amount to low-hanging fruit for online commerce. When was the last time a warranty claim was submitted on a roll of masking tape or box of sandpaper?

How much technical support is need for the shop rags or brake fluid? It seems that the paint and body equipment segment (PBES) and many tool and equipment (T&E) categories are vulnerable to have online predators pick-off sales to customers who are looking to save on products that they order every week. Because these  
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**SCOTT LUCKETT**  
VP, Industry Strategy  
GCommerce Inc.



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SEPTEMBER 2015

Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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## China survey shows growth IN FIRST HALF OF 2015

Growth in the Chinese automotive aftermarket continued at a healthy pace through the first half of 2015, according to key market indicators reported by the supplier members of the China Aftermarket Forum (CAF) of the Automotive Aftermarket Suppliers Association (AASA).

The CAF Member Trends survey presents the latest information on the China aftermarket based on supplier sentiments. In the June 2015 survey, the majority of respondents indicated a positive change in aftermarket sales compared to 2014. Members reported that average aftermarket sales in China increased 11 percent, an uptick from the previous quarter.

The average increase for passenger car independent aftermarket sales was 13 percent, a pace slightly behind 2014, but an increase compared to the previous quarter. Respondents reported a 9 percent increase in passenger car OE service, up from 2014, and the majority also reported increases in new order volume. CAF supplier members indicated that hiring continues to be strong and 50 percent of survey respondents reported capacity additions.

In the CAF survey, aftermarket suppliers continue

to cite counterfeits as their largest issue in China, as well as the lack of formal distribution channels for their products. Some members also noted the ongoing challenges for the independent aftermarket from OEM approaches in the marketplace.

The CAF Member Trends survey provides members with general information on business conditions and market trends to allow high-level benchmarking of sector performance. Participation in the survey is available solely to AASA members who belong to the CAF, and only survey respondents receive the full survey results report.

AASA is positioned in China to assist its supplier members in advancing their business interests in the country's growing aftermarket. AASA represents the collective supplier group, based on its dedication to a robust industry that enables members' business suc-

cess. Members reported that average aftermarket sales in China increased 11 percent.

The AASA CAF is the only aftermarket executives' council of its kind in China, and the AASA China Aftermarket Office recently was launched in the Motor & Equipment Manufacturers Association (MEMA) China Center in Shanghai.

For more information about the AASA China Aftermarket Forum or the MEMA China Center, contact [jburkhart@aasa.mema.org](mailto:jburkhart@aasa.mema.org).

**Editor's note:** Jay Burkhart is AASA vice president, chief strategy officer and executive director of the AASA China Aftermarket Office. Based at the global headquarters of MEMA in Research Triangle Park, N.C., Burkhart provides strategic guidance and global aftermarket direction to Dr. Yilong Chen, managing director of the new MEMA China Center in Shanghai. □



JAY BURKHART  
AASA VP  
China Aftermarket Office



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- Click once to zoom in
- Click & hold to move page around



SEPTEMBER  
2015

Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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Tire Dealer  
Study

Auxiliary  
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# GUARDED OPTIMISM 2015

TIRE DEALERS NOT AS OPTIMISTIC ABOUT PRODUCT SALES IN 2015 AS IN 2014

BY BRUCE ADAMS | Managing Editor

Tire dealers are optimistic about increasing their product sales this year, but not as optimistic as they were in the same survey conducted last year, according to the *Aftermarket Business World* Tire Dealer study.

This year 36 percent of respondents said they plan to increase their product ordering in 2015, compared to 47 percent who last year said they plan to order more products in 2014.

Those who said they plan to hold steady on their purchases increased from 50 percent in 2014 to 60 percent in 2015.

Similarly, when it comes to actual product orders so far this year, 28 percent of respondents said they ordered more parts in 2015 compared to 40 percent who answered the same way in 2014. Those holding steady on their purchases increased from 53 percent in 2014 to 66 percent in 2015.

When it comes to gross margins on parts sales, 34 percent said they showed an increase so far in 2015, compared to 45 percent who said they experienced an increase in the 2014 study.

Some 36 percent said they expect to increase their gross margins on product sales in 2015 calendar year, compared to 49 percent who answered the same way last year about calendar year 2014.

Tire dealers report that advertising on their website (21 percent) and via email direct to customers (21 percent) were the favored methods of reaching out to customers in 2015.

Methodology: The *Aftermarket Business World* Tire Dealer Product Study was fielded to readers of sister publication *Motor Age* who sell tires in the aftermarket. The study results are intended to show general market trends, not statistical certainties. □

CONTENTS 17 Auxiliary Lighting 18 Battery Chargers 19 Water Pumps

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Industry News  
Market Trends & Analysis

Products  
Contact Us

4 International Trends  
6 Vendor Market Trends

8 Dealership Market Trends  
10 Technology Solutions

11 Donny Seyfer  
12 Mark Smith

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# Auxiliary Lighting

## Preferred supplier

Warehouse distributor	30%
Auto parts retailer	33%
Jobber	21%

## Reason for supplier preference

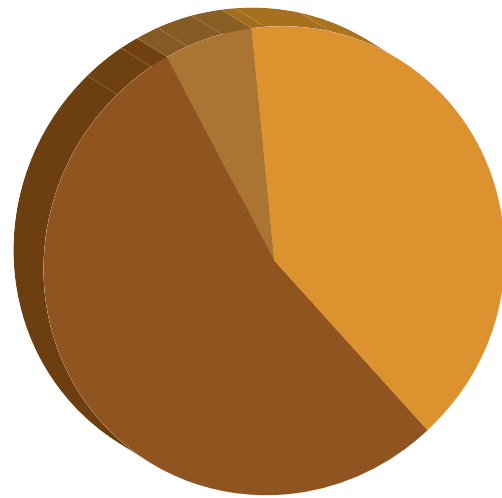
Long-standing relationship	27%
Offers quality product	18%
Availability	32%

## 2015 ordering expectations

**40%**  
Increase

**54%**  
Hold Steady

**6%**  
Decrease



**47%** report that when customer maintenance/repair work is completed, it RARELY leads to an auxiliary lighting sale through retail purchase or installation.

# GUARDED OPTIMISM 2015

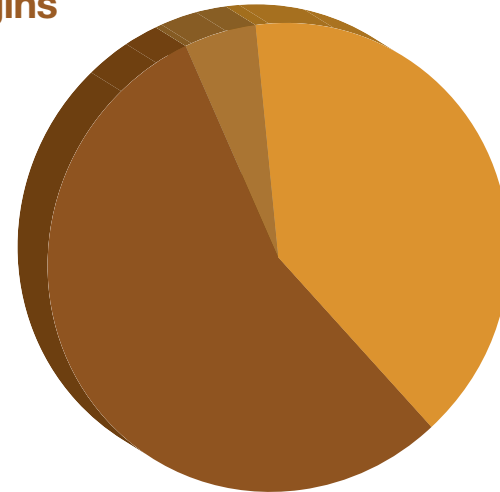
**34%** advertise the auxiliary lighting they sell through direct email to customers.

## Expected 2015 gross margins

**40%**  
To Increase

**55%**  
To Hold Steady

**5%**  
To Decrease



## Most important product characteristics

OEM form, fit, function	23%
Price	9%
Quality	26%
Brand	2%

## Sales tactics implemented

Bundle w/related products	50%
Unadvertised specials	21%
Provide training	22%
Price breaks for loyalty	24%

**54%**

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GMB



SEPTEMBER 2015

Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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# Battery Chargers

## Preferred supplier

Warehouse distributor	25%
Auto parts retailer	41%
Jobber	17%

## Reason for supplier preference

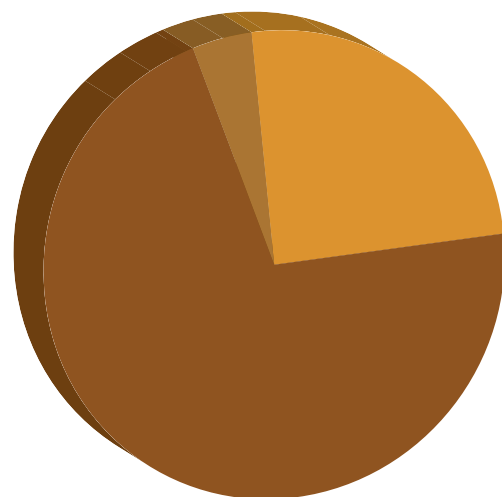
Long-standing relationship	23%
Offers quality product	27%
Availability	31%

## 2015 ordering expectations

25% Increase

71% Hold Steady

4% Decrease



**35%** report that when customer maintenance/repair work is completed, it RARELY leads to a battery charger sale through retail purchase.

# GUARDED OPTIMISM 2015

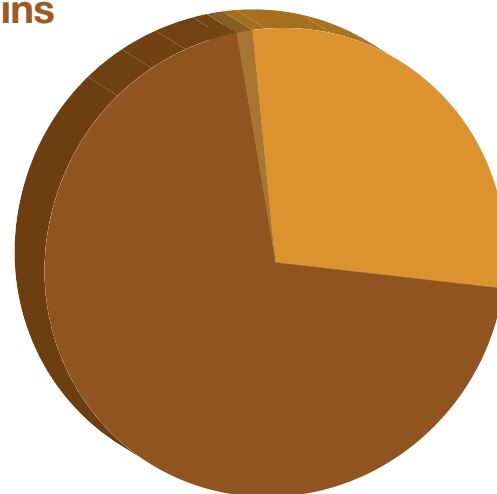
**25%** advertise the battery chargers they sell through direct email to customers.

## Expected 2015 gross margins

29% To Increase

70% To Hold Steady

1% To Decrease



## Most important product characteristics

OEM form, fit, function	3%
Price	9%
Quality	36%
Brand	6%

## Sales tactics implemented

Bundle w/related products	39%
Unadvertised specials	18%
Provide training	21%
Price breaks for loyalty	27%

**64%**

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Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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# GUARDED OPTIMISM 2015

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## Water Pumps

Tire Dealer Study

### Preferred supplier

Warehouse distributor	22%
Auto parts retailer	41%
Jobber	23%

### Reason for supplier preference

Long-standing relationship	28%
Offers quality product	21%
Availability	25%

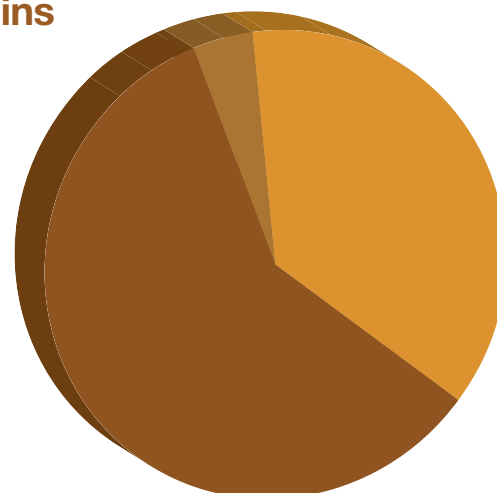
**31%** advertise the water pumps they sell through their website to customers.

### Expected 2015 gross margins

**37%**  
To Increase

**59%**  
To Hold Steady

**4%**  
To Decrease

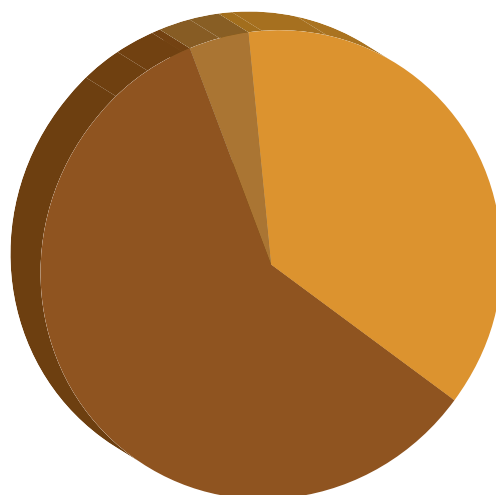


### 2015 ordering expectations

**37%**  
Increase

**59%**  
Hold Steady

**4%**  
Decrease



### Most important product characteristics

OEM form, fit, function	18%
Price	6%
Quality	63%
Brand	6%

### Sales tactics implemented

Bundle w/related products	25%
Provide training	12%
Advertised specials	6%
Price breaks for loyalty	11%

**65%**

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Industry News

Products

4 International Trends

8 Dealership Market Trends

11 Donny Seyfer

Market Trends & Analysis

Contact Us

6 Vendor Market Trends

10 Technology Solutions

12 Mark Smith

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Auxiliary Lighting Philips

Battery Chargers Wirthco

Water Pumps GMB



Industry News

Market Trends & Analysis

Products

Contact Us

4 International Trends

6 Vendor Market Trends

8 Dealership Market Trends

10 Technology Solutions

11 Donny Seyfer

12 Mark Smith

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