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The Telematics Challenge

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The Telematics Challenge

The number of plug-in telematics solutions is increasing, but access to OEM data is the Holy Grail

BY BRIAN ALBRIGHT | Correspondent

Remote diagnostics via telematics systems remains a hot topic in the aftermarket, with more third-party solution providers emerging and more OEMs offering enhanced “connected vehicle” services to their customers.

Where aftermarket telematics are concerned, the industry still wants OEMs to give up some of the advantage created by embedded solu-

tions that tie drivers directly back to the dealership for service.

“Our association’s main goal is to open up that OEM access,” says Aaron Lowe, senior vice president for regulatory and government affairs at the Auto Care Association. “Similar to our

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Analysis by market

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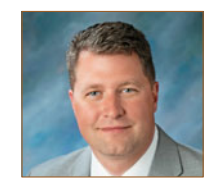
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The telematics challenge

“Commercial telematics systems will be installed in more than 73 million vehicles by 2020.”

efforts on the Right to Repair Act, we are trying to move the manufacturers to pen up access so everyone has the same ability to use the information being transmitted from those vehicles.”

Exactly how to take full advantage of that data, however, is something that even the automakers have yet to completely get their arms around.

“The OEs have us locked out, but industry organizations are working together to clear that up and get the aftermarket on the table,” says Jim Dykstra, founder and president of Aftermarket Telematics Technologies (ATT). “But the reality is, even if GM and the others said they were going to share that data, what then? How will we interact with that data, and the data coming from the plug-and-play devices? How do you route that data to the shops and bring value to it?”

According to Greg Potter, executive manager of the Equipment and Tool Institute, commercial applications have been the primary hot spots for telematics so far. “I would say the largest focus so far has been in the fleet tracking and maintenance field where fleet managers see the

value and have been willing to pay for these services,” Potter says. “As with the somewhat slow take-up with On-Star, many individual customers have been reluctant to pay for the services being offered to this point.”

ABI Research says commercial telematics systems will be installed in more than 73 million vehicles by 2020. Revenue will grow from \$20.02 billion in 2015 to \$47.58 billion by 2020, a CAGR of 18.9 percent.

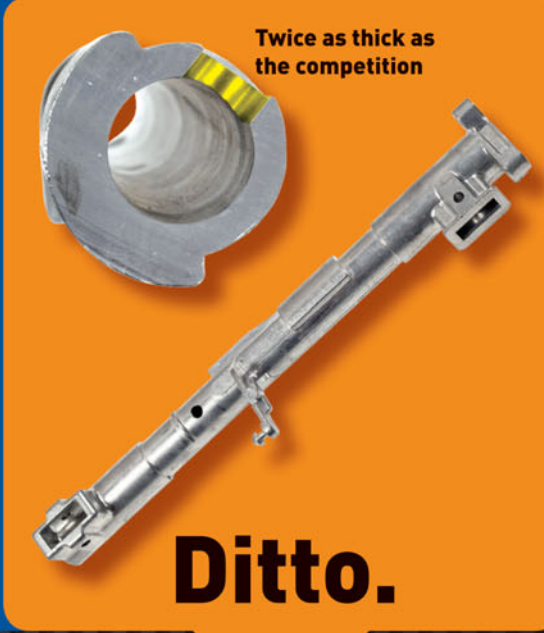
Frost & Sullivan expects just the OBD-II-based telematics market to hit \$1 billion by 2020, while research firm Berg Insight estimates that nearly 12 percent of all cars sold worldwide in 2013 were equipped with an OEM embedded telematics system. The embedded market is expected to reach 54.5 million units in 2020.

OEMs and other companies continue to expand their telematics offerings. Lexus, for example, announced a new service through its Enform platform that automatically alerts drivers about impending maintenance issues. It will be available on 2016 models. Dealers can ...CONTINUE READING □

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VENDORS

Gen Yers hiking up global demand for versatile SUVs, crossovers

BY JAMES E. GUYETTE
News Correspondent

Millennials may be unconventional in some respects when compared to previous generations, but contrary to what has become conventional wisdom of sorts, not every Gen Yer is content to take buses and trolleys or borrow someone else's car to meet their transportation needs.

TRENDS & MARKET Analysis

Generally ranging from those born in the early 1980s to the early 2000s, the worldwide millennial generation is surpassing the baby boomer population in numbers – and some 65 percent of them are indeed expressing interest in owning or leasing a vehicle, creating a vast international automotive sales and repair marketplace for decades to come. Out-of-production used cars are also seeing significant demand.

Millennials are particularly poised to become the primary target segment for SUVs and crossovers, especially smaller models, as these

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Q&A

DAN GILLEY
President
RLO Training



What are some strategies that repairers should be implementing to attract millennial customers?



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aspiring motorists approach their prime purchasing years.

A recent Frost & Sullivan study finds that between 2012 and 2014, the global market for subcompact SUVs and crossovers grew by more than 40 percent, driven mostly by millen-



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“When it comes to used cars, value and utility appear to trump all else for many millennials.”

nials (along with older drivers seeking a second car.) Total sales in 2014 stood at 3.2 million units from 62 models, and this is likely to increase to 7.4 million units from 22 additional models by 2022, according to F&S consultant Sujeesh Kurup.

“Robust growth is expected from the Asia-Pacific market between 2015 and 2017,” he reports, “after which Europe will emerge as a stronger contributor.”

Millennials account for 24 percent of Europe’s adult population, and industry-wide European SUV sales are expected to increase from 20 percent of total passenger car sales in 2014 to 27 percent by 2020. By the end of the decade, Ford projects that SUVs will account for 29 percent of its global sales, spurred by the rising demand in Europe and China. The automaker’s SUV market share in Europe grew from 9 percent to 19 percent between 2008 and 2013; and from 7 percent to 17 percent in China during the same period.

A recent Ford survey further confirms that SUVs are highly desired by drivers in the 17-34 age range, and one in four European millenni-

als who intend to purchase a vehicle within the next year say they are considering an SUV.

“The survey makes two important points – the SUV boom in Europe is not a passing fad and young people are not as ambivalent about car ownership as some suggest – especially when it comes to SUVs,” says Roelant de Waard, vice president of marketing, sales and service at Ford of Europe. “For both rational and emotional reasons, many younger buyers in Europe see SUVs as the perfect choice for them. More so than other age groups, millennials say SUVs make them feel powerful when they drive, are the kind of vehicle they want to be seen in and are more sporty and fun to drive than other vehicle types.”

The key to market success is to provide customers with a strategic balance between the manufacturer’s suggested retail price and the actual selling price along with “trendy design cues,” according to Kurup. Subcompact SUVs blend the features of subcompact cars, compact cars, mid-size cars and compact SUVs ...CONTINUE READING □

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VENDORS

Auto Plus adds to footprint in wake of Ichan's Uni-Select deal

BY JAMES E. GUYETTE
News Correspondent

Iconic investment guru Carl Ichan is bullish on the aftermarket as evidenced by Icahn Enterprises' \$340-million purchase of Uni-Select USA and Tennessee's century-old Beck/Arnley Worldparts from Canada's Uni-Select Inc.

TRENDS & MARKET Analysis

"With the advent of the bull market over the last five years, it has become increasingly difficult to find companies that we believe to be undervalued and with growth potential. That is why we were happy when we learned that the United States segment of Uni-Select was available," said Ichan in February when the transaction was first announced.

"We believe that with Icahn Enterprises' great resources and our knowledge of the industry we will be able to grow this company, take advantage of consolidation opportunities, and thereby greatly benefit the company's custom-

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Q&A

JOSEPH BARLETTA
Founder, President and CEO
Smart Charge Residential



Q Are your customers coming to you with their concerns about range anxiety of their electric vehicles?

A What did Barletta say? Continue reading online.

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ers, manufacturer partners and employees, as well as the shareholders of Icahn Enterprises," he explained.

Embracing the Auto Plus banner that Uni-Select USA rolled out in October of 2014, the



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With Brent Windom as CEO, Auto Plus is embarking on an aggressive growth strategy.



new Ichan-owned entity is now to be known solely as Auto Plus, complete with the design of a new logo and a company-wide store rebranding initiative that will unfold throughout 2016.

Ichan's Auto Plus acquisition, finalized in June, included 38 distribution centers and satellite locations, 240 corporately owned jobber stores and more than 3,500 employees in the U.S.

Uni-Select Inc., headquartered in Boucherville, Quebec, retains ownership of its FinishMaster automotive paint and related products distribution division in the U.S. along with its Canadian distribution network encompassing more than a dozen warehouses, nearly 200 stores more than 2,400 employees.

With Brent Windom as its president and CEO, Auto Plus is already embarking on an aggressive growth strategy as signaled by its recent opening of two new stores in Olean, N.Y., and Clinton, Miss., along with expanding its Dallas distribution center to cover 125,000 square feet of warehouse space.

The company also has purchased Central City Auto Parts in Cleveland, Tenn.; Xpress Auto Parts in Ft. Myers, Fla.; and the

Wisconsin-based United Auto Parts distribution chain with locations in Fond du Lac, Sheboygan, Sheboygan Falls, Ripon, Waupun and Beaver Dam.

"Auto Plus has been aggressively positioning itself to become a top tier automotive aftermarket company. These recent acquisitions help push us toward this goal," according to Windom. "Our plan is an accelerated one and these recent successes are a reflection of our commitment to growth. These newly acquired stores build toward our new hub-and-spoke distribution model. We expect strategic growth through acquisition to continue into 2016 and beyond."

The impact is certainly being felt along Third Street in Fond Du Lac, Wis., where United Auto Parts, established in 1930, is headquartered.

Given the consolidations being experienced throughout the aftermarket, "the timing was right" to sell the operation when Auto Plus came calling with an offer, according to Trace Blakely, a former co-owner of United Auto Parts who will stay on to assist with the

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DEALERSHIPS

VW recall is bad news for owners

Emissions system chicanery to require costly fixes that affect vehicle performance

BY BRIAN ALBRIGHT
Correspondent

Vehicle owners affected by the recent Volkswagen/Audi emission scandal may have a nasty surprise in store when they get their recall notices. Many of the potential fixes Volkswagen has outlined could impact acceleration, fuel economy, and even trunk space in the cars covered by the recall.

TRENDS & MARKET Analysis

In September, Volkswagen admitted to a brazen scheme in which it used software to manipulate emissions test results for its “clean” diesel vehicles, taking advantage of weaknesses in U.S. EPA testing procedures.

“Let’s be clear about this,” said Michael Horn, president and CEO of Volkswagen Group of America. “Our company was dishonest.”

Some 500,000 vehicles in the U.S. (and 11 million worldwide, roughly 20 percent of the company’s passenger fleet) were loaded with illicit software. The company has set aside \$7.2 billion

Dealer Newsmaker

Q&A

J.D. NEY
Manager, Canadian
Automotive Practice
J.D. Power



How has overall satisfaction with dealer service versus the aftermarket changed over time?



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to cover the anticipated costs of the recall.

The EPA issued a notice of violation of the Clean Air Act (CAA) to Volkswagen AG, Audi AG, and Volkswagen Group of America after the company copped to the software switch.

“Using a defeat device in cars to evade clean



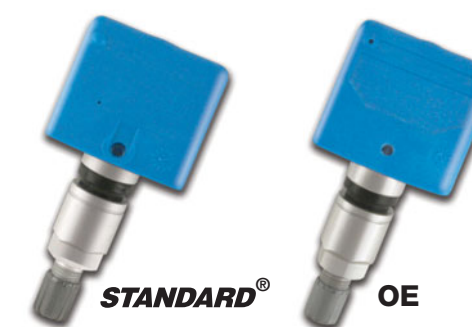
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air standards is illegal and a threat to public health,” said Cynthia Giles, assistant administrator for the Office of Enforcement and Compliance Assurance at the EPA.

“Working closely with the California Air Resources Board (CARB), EPA is committed to making sure that all auto-makers play by the same rules. EPA will continue to investigate these very serious matters.”

EPA and CARB uncovered the problem after independent analysis by researchers at West Virginia University, working with the International Council on Clean Transportation, raised questions about emissions levels. In September, after EPA and CARB confronted the company and threatened to deny its 2016 model emissions certifications, Volkswagen admitted that the cars contained defeat devices.

The affected models include the 2009-2015 Jetta, Beetle, and Golf; 2014-2015 Passat; and the 2009-2015 Audi A3.

VW’s admission prompted National Highway Traffic Safety Administration (NHTSA) chief Mark Rosekind to say his agency would take a harder look at all auto-maker claims, particularly where self-certified testing is involved. At a recent Auto Industry Action Group conference in Detroit, he told attendees, “You don’t have to say, ‘Was that a lie?’ You just have to challenge every assumption when information is provided.”

The EPA, meanwhile, plans to strengthen its own emissions testing, and announced an audit of every current

“Roughly 20 percent of the company’s passenger fleet was loaded with illicit software.”

make and model of light-duty diesel passenger vehicle to confirm emissions information.

VW and Audi could face penalties as high as \$18 billion. Hyundai and Kia were previously penalized \$300 million in 2014 for fudging fuel economy and emissions data.

According to the U.S. EPA, the software was designed to recognize when the vehicle was being tested on a dynamometer (an automotive treadmill), and then command the emissions control systems to operate at their maximum effectiveness. That would bring the vehicles into compliance with U.S. and California emissions standards. Afterward, the systems would switch to a different mode and increase emissions by as much as 40 times.

No easy solutions

The Volkswagen emissions recall poses a dilemma for the automaker and drivers in that the potential fixes could reduce the vehicles’ fuel efficiency. In an industry that is already challenged to get consumers to complete recalls, issuing one that could potentially degrade vehicle performance is a tall order.

The company is working on a technical fix that can remove the software without affecting performance. A total of 488,000 VW and Audi vehicles with four-cylinder engines were recalled, and the automaker told dealers to stop selling those diesel models.

During testimony before the U.S. House of Representatives Energy and Commerce Committee,

North American CEO Horn outlined several possible fixes, most of which involve up to five to 10 hours of labor per car. Most will require a full replacement of the emissions control system.

Roughly 430,000 of the older model vehicles will require hardware upgrades that could include a urea SCR tank and a new catalytic converter. About 90,000 2012-2015 Passat sedans will require a software fix only, but will have to wait until later in 2016 for the repair. Another 70,000 vehicles only require a software fix that could be available as early as the beginning of 2016.

The software fixes, however, could reduce fuel economy and/or torque. That could put VW in the crosshairs of additional lawsuits. When Kia and Hyundai downgraded their fuel economy ratings, they paid a \$395 million settlement to drivers to compensate them for higher fuel costs. VW is already the target of 230 class action suits in the U.S.

The urea tanks, meanwhile, will cost thousands of dollars to install, require periodic urea refills, and could eat up space in the trunk of the car. The hardware upgrade also undercuts VW’s clean diesel pitch, which was based in part of the idea that they had eliminated the need for urea in the system.

Volkswagen CEO Martin Winterkorn resigned in October, and the company’s share price dropped by 25 percent. In his testimony on Capital Hill, VW’s Horn said ...CONTINUE READING ▢

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TECHNOLOGY SOLUTIONS

Tech start-ups target diagnostics port for infotainment, connectivity

BY BRIAN ALBRIGHT
Correspondent

As more technology companies develop connected vehicle applications, the OBD-II port has become a critical part of a rapidly growing tech market.

According to ABI Research, OBD-II-based solutions will lap head units with visible displays when it comes to infotainment, location, and other in-vehicle applications and services. Sales of OBD-II form factors will see a compound annual growth rate of 29.5 percent and account for more than 70 percent of aftermarket infotainment shipments in 2020.

TRENDS & MARKET Analysis

At the Consumer Electronics Association, the number of OBD-II offerings from members is also growing. According to Laura Hubbard, senior manager of industry communications at CEA, traditional aftermarket suppliers and a new wave of start-ups are

targeting the handy diagnostic port with new applications.

“Some of these companies come from an automotive background,” Hubbard says. “There is such a lag time in the technology being added to the vehicles by the OEMs that by the time the car is in production, the tech might be obsolete. These new companies can get that technology into the car without it having to be built in, and they connect with smartphones, which in many cases are more powerful than the computers in the vehicle.”

Onboard diagnostics (OBD) plug-in systems typically make use of an embedded cellular connection to communicate with the vehicle CAN-bus. In addition to familiar usage based insurance (UBI) equipment, there are also plug-in solutions for vehicle diagnostics, driver tracking, Wi-Fi hotspots, and other applications.

Right now, the biggest piece of the OBD-II pie belongs to the UBI market, which will generate \$475 million in revenue for

manufacturers by 2020, according to Ptolemus Consulting Group. U.S. companies have had an easier time because the OBD-II ports are standard in all vehicles produced after 1996. In Europe, the OBD ports follow different standards, making it difficult for manufacturers to market solutions.

Third-party suppliers also have developed multi-purpose connected vehicle platforms. Vinli, for example, is an OBD-II device that includes Wi-Fi, vehicle tracking, teen driver monitoring, diagnostics, roadside assistance, home automation, and an app store that provides access to other solutions. Drivers pay a \$30/year subscription fee. Upgrades for premium apps and services cost an additional fee.

Other vendors with similar offerings include Automatic, Mojo and Zubie. Most of these devices provide an application development framework so that developers can provide software solutions that take

“There are plug-in solutions for usage based insurance, diagnostics, driver tracking and more.”

Technology Newsmaker

Q&A

CHRIS GARDNER
VP, Automotive Aftermarket
Suppliers Association



What was the genesis of the Connected Aftermarket initiative? Why was it launched at this particular time?



What did Gardner say? Continue reading online.

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advantage of the wireless vehicle-mobile phone connection enabled by the hardware.

“This is what makes OBD-II platform aftermarket application frameworks like Mojo or Vinli so appealing,” said James Hodgson, analyst at ABI. “A simple reality ...CONTINUE READING ▢

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Training in the shop IS CHALLENGING

We all like to play Nostradamus from time to time and try to predict what the future of our business looks like.

In the roles I get to play as chairman of ASA, a trustee for NATEF, board member of NASTF, teacher, and most importantly in working in our repair shop, planning the next steps are my favorite part of the job. I am one of those weird people who embrace change for the most part. I like to make systems better, but I am not a

fan of fixing something until it is broken or about to break.

Without sounding like an alarmist I have to say that it's already broken. About 60 nights a year I get to teach technicians. I love this job and the guys that I am teaching.

As an industry we have expressed concern that a large number of our students have gray hair but I don't see that as the most immediate concern. For those of you who do have the hair color that comes

with experience, think about the way you learned. Think about what you learned and how it happened.

For the most part we learned through a combination of outlets. Some may have had some vocational school, we attended technical training and we read books when we simply fired every silver bullet we had. Our most valuable asset however was the old guy who taught us the practical things that you just can't get from school. Herein lies my concern.

The old guys are not in a position to be teachers in the shop because vehicle technology exposes many of the things we learned incomplete or even inaccurate. Take for example how electricity is used in modern vehicles.

There was a time when you could be considered an electrical expert when you could diagnose continuity in wires, circuits and switches, and could diagnose a relay by swapping one with another "known good one." You might laugh at this but the truth is many of our guys are still only a step away from that skill set. A large percentage cannot use a lab scope at all, they do not know how to do a voltage drop test properly and they do not understand fully the relationship between voltage and amperage. If you think I am wrong come sit in one of my classes when I ask, "If the voltage on a

“Our most valuable asset was the old guy who taught us the practical things that you can't get in school.”

circuit is high what does it mean?”

OK, so if our journeymen have this problem who is teaching the kids how to do this? Vocational schools you say, and I would agree that it is taught, but if it is not being used properly in the shop why and how would these kids ever become experts?

The nervous system of the automobile has become the single largest component with the most parts, yet we have techs who only see through the keyhole to the room where diagnostic expertise lies.

Yes, I recognize there are many very good technicians who have this nailed but it is not the norm and it certainly is not in enough quantity to keep up with the repairs or needs of the vehicles

...CONTINUE READING ▢



DONNY SEYFER
Operations Manager
Seyfer Automotive, Inc.

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Taking inventory **OF MY CAREER**



My children want no part of this business. For that, I am sad, but at least I've raised intelligent kids.



In the days of my youth, I welcomed the changing seasons of business. Now it seems the older I get the more I worry that each change will evoke tears and jeers from my staff as well as myself. I am becoming a grumpy old man in spite of the fact I vowed never to become a McCrudgeon.

Lots of folks refer to this mood swing as the winter blahs, to them I just say, "Blah!" I've gotten to the point that all of these changes have simply worn me to a fraction of the enthusiastic jobber that I used to be. I've decided that I cannot continue the same path anymore. Therefore, consider this my resignation.

I resign that someone is always gonna have something better priced than me. Being the cheapest has never really made me any money.

I do not have a psychology degree, although 30 years of this crap should entitle me to an honorary doctorate of something. However, sometimes employees and customers are just buttheads. I can't fix them.

I have given over half of my life to this industry; this industry has taken the remainder. I will always envy others who don't have to work six or seven days a week and get to take real vacations. But, I should have figured that out way before now. Suck it up buttercup.

I have missed so many of my family events paying

due diligence to our business that I feel like an outsider when I do get to attend the occasional birthday, wedding or funeral of a family member. My family has become my business associates and ever-changing group of gypsy-like employees.

The telephone has morphed into an evil device. I hate that son-of-a-bitch. Google and other robot callers have possessed the soul of my phone system, which results in unnecessary panic trying to answer calls that have satanic pre-recorded parasitic messages that ungraciously interrupt my hurried greeting. And, who in the heck is "prophet Manessa?"

There is no loyalty. Loyalty is a myth, like dragons, pixies and leprechauns. Bigfoot is not a myth, but I bet he'd eat any kind of beef jerky, so I do question his loyalty.

You should never eat pickled eggs and drink a lot of beer if you have to work the next day.

I will never have an advertising budget like the big box retailers. We will just keep up our guerilla warfare advertising campaign, taking pop shots whenever we can, then fade back into the bush only to re-emerge as opportunity permits.

People who self-diagnose and buy parts online only to then call and ask me what I think is wrong with their car should be horse whipped. I am now going to tell

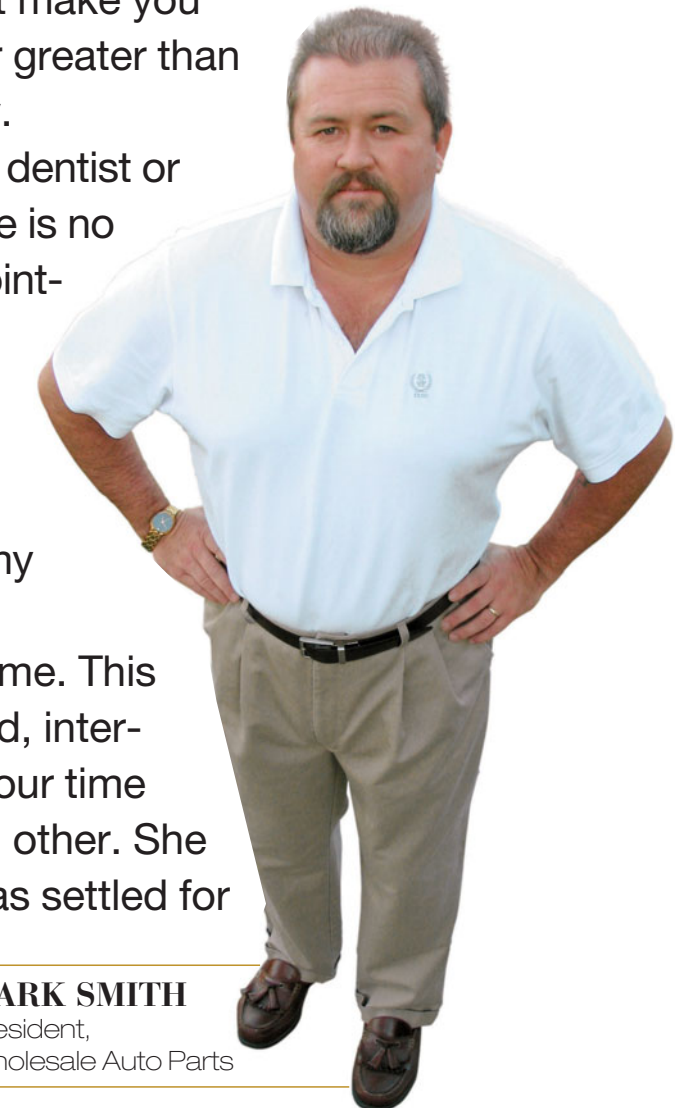
them the main problem is a mirror-based issue and they should look into that first.

Gear-head car junkies should always work on their own vehicles. I cannot make you happy. Your ego is far greater than my realm of capability.

If you have a doctor, dentist or hair appointment, there is no need to make an appointment for a complete tune-up 10 minutes prior to your other appointments. Flash Gordon is not one of my technicians.

My wife really loves me. This business has occupied, interrupted, and mangled our time with and without each other. She deserves more, but has settled for far less than was possible.

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MARK SMITH
President,
Wholesale Auto Parts



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VW scandal opens door TO EMISSIONS CHANGES

“The VW affair is likely to spur the EPA to revise its policy on aftermarket catalytic converters.”

The Volkswagen emissions cheating scandal could have numerous repercussions for various aftermarket auto sectors. The fact that VW was able to install software on diesel models that defeated the EPA laboratory emissions tests has to raise questions in the minds of federal and state regulators on a number of fronts.

While the VW defeat devices were illegal, all one has to do is Google “auto defeat devices” and see all sorts of aftermarket emissions products pop up for sale.

Chris Grundler, director of EPA’s Office of Transportation and Air Quality, told the *Washington Post* the agency is reviewing its testing procedures and working on a process to screen for defeat devices similar to the software that VW used to make its cars run cleaner during emissions tests.

The EPA’s policy on aftermarket defeat devices is unclear. The EPA/DOJ signed a consent decree back in 2007 with Casper’s Electronics over Casper’s sales of “oxygen sensor simulators” or “O2 Sims.” An O2 Sim tricks an automobile engine’s computer into sensing a properly functioning emission control system, even when the catalytic converter is missing or faulty. A false electronic signal is sent to the car’s engine control

computer, preventing the “check engine” or malfunction light from illuminating. Those devices are widely available today.

Joe Kubsh, executive director, Manufacturers of Emission Controls Association (MECA), says the EPA’s enforcement of aftermarket policies needs attention.

“There are these oxygen foolers out there, and people are selling aftermarket converters without any precious metal on them,” he says. But he notes that the agency has limited enforcement resources, which limit the attention the agency can pay to aftermarket products. Julia Valentine, an EPA spokeswoman, was not able to clarify the status of aftermarket defeat devices.

Rather than wielding a bigger stick against O2 Sims and other products, the VW affair is more likely to spur the EPA to revise its policy on aftermarket catalytic converters. The MECA and many of the Northeast states have been pushing unsuccessfully for a tightening of the policy for a number of years. What makes that more likely now are the concerns about emission controls raised by the VW affair and the new EPA ozone standard.

The EPA reduced the National Ambient Air Quality Standards (NAAQS) for ground-level ozone to 70 parts per billion (ppb) from 75 ppb to protect public health.

Ground-level ozone forms when nitrogen oxides (NOx) and volatile organic compounds (VOCs) react in the air. The 70 ppb standard will push a number of areas in the Northeast “out of attainment,” according to Kubsh.

One of the key tools those states could use to get those areas into attainment would be access to California’s aftermarket catalytic converter program, which is tougher than the EPAs. “The new ozone rule will give the Northeast states new leverage with the EPA,” Kubsh says. “The agency has actually started to pay attention to this conversation in the not-too-distant past as opposed to stonewalling us.”

California is in the midst of revising its onboard diagnostic (OBD) policies and there is certainly a possibility that given the ...CONTINUE READING



STEPHEN BARLAS
Washington Correspondent

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New distribution challenges IN THE AFTERMARKET



As manufacturers battle independents for buyers' loyalty, more entities enter the game.



Car makers can lure buyers with elegant designs, attractive features and billions of dollars in advertising. But long-term customer loyalty often rests on something far less sexy: the dependability of the aftermarket parts supply chain.

The quality of a maintenance or repair job often will determine a car owner's ultimate opinion of a given manufacturer. What's more, in the age of social media and the Internet, a bad customer experience can quickly go viral and do serious damage to the brand.

Even for reasons beyond customer service, the automotive industry would do well to pay attention to the aftermarket opportunity. It offers potentially strong revenues and margins, at a time when new car sales are flat in many major markets.

Managing the aftermarket parts supply chain is no easy task. The sector is rife with challenges, including the difficulty of storing, moving and tracking countless numbers of parts, every one of them crucial to the completion of a maintenance or repair job.

On the repair side, the market divides into two primary channels – dealer and independent service providers. The first is made up of vehicle manufacturers, their associated dealer networks and repair businesses. The sec-

ond consists of providers that aren't affiliated with the manufacturers. They might be full-service franchises, large automotive repair centers dealing in over-the-counter parts, or smaller, "mom-and-pop" style repair shops.

A massive market

Taken as a whole, the size and scope of the market is immense. In 2010, according to the Boston Consulting Group (BCG), the value of the aftermarket for cars more than eight years old was around \$77.3 billion, and nearly \$20.7 billion for vehicles up to four years old. Since then, says BCG, the trend has been a gradual shift from dealer repair shops to independent service providers.

The reasons are many. The economic woes of recent years have caused vehicle owners to delay regular service visits, and even defer both minor and major repairs. As a result, parts providers and repair shops are finding it harder to predict which inventories they need to have on hand.

Add in an explosion in the number of parts, caused by the growing complexity of new vehicle models. A Ford Mondeo, for example, might require some 27,000 separate parts. Service providers can't possibly keep all of those items in the shop at once. Yet given the high degree

of computer technology in today's cars, owners need professional repair and maintenance more than ever before – and they expect to be served quickly and efficiently.

Where they go to get that service is changing as well. New consumer-protection laws are loosening the manufacturers' grip on new-car work. In the European Union, for example, vehicle owners were granted more freedom of choice by the Block Exemption Regulation of 2010, which prevents vehicle manufacturers from requiring that cars be serviced at their affiliated dealerships.

Such consumer freedoms already exist in Asia, where manufacturers don't have a lock on buyers' post-sales business, and many smaller repair operations thrive. Nevertheless, Asian automakers strive to hold on to that work through generous customer incentives, especially during the first several years of a new car's life.

Even as manufacturers battle independent shops for the
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MARK KUNAR
President of
Automotive, Engineering
and Manufacturing, Exel



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Turkey is becoming **A TOP 10 ECONOMY**

Turkey is experiencing strong and sustainable economic growth, and is working hard toward its goal of becoming one of the world's Top 10 economies by 2023.

Turkey also is a strong market for North American automotive aftermarket products, so the Overseas Automotive Council (OAC) of the Automotive Aftermarket Suppliers Association (AASA) have chosen it as the first of its U.S. Department of Commerce certified trade missions in April 2016.

Why Turkey? Its gross domestic product (GDP) per capita has more than tripled over the past decade. Turkey's rising middle class has resulted in an explosion of consumer demand. The country is home to a young, educated labor force with more than half of its population under the age of 30.

Much of this consumer demand is focused on automotive-related spending. Turkey's average age for passenger cars is 11.8 years, according to the Frost & Sullivan report, "Strategic Analysis of the Turkish Automotive Aftermarket: Capitalizing on Growth in Vehicle Maintenance and Repairs."

In the light vehicle segment, nearly 65 percent of the vehicle parc is above five years old. This shows a considerable amount of vehicles are in the aftermarket "sweet spot" in terms of needed repair and maintenance. An

overview of the Frost & Sullivan report appears in the Q3 2015 issue of the OAC / AASA Global Report.

Turkey's market has a high demand for U.S. exports and it is a friendly climate for U.S. companies. More than 1,000 small, medium and large U.S. firms have already opened offices in Turkey. Given its close proximity to markets in Europe, the Middle East and Central Asia, Turkey serves as a regional hub for many of these firms.

Automotive aftermarket exporters can expand their global business in Turkey by joining the OAC's certified trade mission to Istanbul on Sunday, April 3, through Thursday, April 7, 2016. The Turkey Trade Mission agenda will include a welcome/networking reception, one-on-one meetings with local distributors, site visits of local distribution facilities and follow up meetings with potential customers and/or participation in Automechanika Istanbul.

The AASA OAC trade mission is certified by the U.S. Commercial Service. USCS representatives will provide market briefings on Turkey for the delegation and

recruit local aftermarket distributors for AASA OAC member companies to meet.

Companies interested in participating in the AASA OAC trade mission may submit applications to the Department of Commerce. Registering companies will be vetted by the Department of Commerce in January, so applications should be submitted as soon as possible. For more information, contact bbrucato@asa.mema.org.

The AASA OAC is planning a certified trade mission to Chile and Peru in the fall of 2016. Future trade missions also are planned for Bolivia (Santa Cruz), Columbia, China, Guatemala/Panama, Poland, the Middle East, Russia, South Africa and South Korea.

The OAC is one of the oldest organizations in the global automotive aftermarket. The council strives to be the premier international community for all North American manufacturers and exporters, and all international importers, distributors and agents who participate in the automotive aftermarket. □



BEN BRUCATO
Executive Director AASA OAC



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A FLEETING LOOK AT FLEETS

STUDY EXAMINES BUYING PREFERENCES OF FLEETS

BY BRUCE ADAMS | Managing Editor

Some 55 percent of fleet managers prefer to buy parts from national parts retailers and 30 percent prefer to buy from warehouse distributors, according to the 2015 *Aftermarket Business World* Fleet Product Study.

Dealerships and OEM manufacturers were a distant third and fourth at 6 percent and 5 percent respectively.

The top characteristics that fleet managers look for in suppliers are parts availability, fast delivery, price and customer service, in that order. The next tier of the most important supplier characteristics included good relationship, carries specific brands and return policy.

When it comes to why fleet managers buy certain products, the most important characteristics are quality 33 percent, reliability 18 percent, brand

name 13 percent and price 12 percent.

After suppliers acquire fleet managers' business, they are in a strong position to keep it as only 17 percent of respondents said they are open to switching to a new supplier.

Forty-eight percent of those managers who are open to switching suppliers prefer to be contacted by email, while 26 percent said phone and 13 percent by a personal visit.

Fleet managers prefer to keep thin product overheads as 72 percent said they order parts as needed, while 18 percent said they keep a one-month supply of products, and 8 percent keep a three-month supply.

The Fleet Product Study was fielded via email to readers of *Aftermarket Business World* who are part of a fleet. The results are intended to show general market trends, not statistical certainties.

FLEET PRODUCT STUDY

Brakes

16% of fleet manager respondents say they are open to switching brake suppliers. Of those, 43% report email is the preferred method potential new suppliers should use to contact them.

33% of fleet managers use only one supplier for brakes.

73% of respondents order brakes inventory as needed. 15% keep a one-month supply on-site.

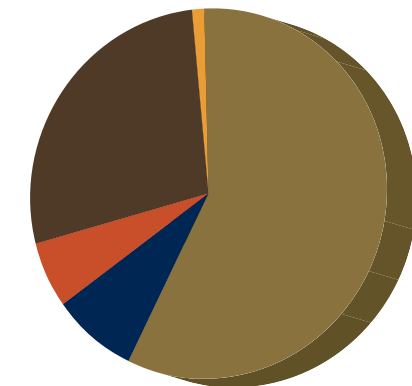
Frequency of brake service

| | |
|--------------------|-----|
| Whenever needed | 89% |
| Every three months | 3% |
| Every six months | 6% |

A FLEETING LOOK AT FLEETS

Preferred fleet supplier

| | |
|-------------------------|-----|
| National parts retailer | 59% |
| Dealership | 6% |
| Vehicle manufacturer | 6% |
| Warehouse distributor | 28% |
| Other | 1% |



Most important supplier qualities

| | |
|-----------------------|-----|
| Parts availability | 85% |
| Fast delivery | 46% |
| Customer service | 42% |
| Price | 41% |
| Carry specific brands | 32% |

Most important brake qualities

| | |
|-------------|-----|
| Quality | 39% |
| Reliability | 15% |
| Brand name | 13% |
| Price | 11% |
| Warranty | 7% |

86% of respondents order brakes online 0-10% of the time.

Some totals exceed 100 percent because respondents provided multiple answers. Others do not reach 100 percent because all answer options are not listed.

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Fleet Product Study

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Auxiliary Lighting

19% of fleet manager respondents say they are open to switching auxiliary lighting suppliers. Of those, 54% report email is the preferred method potential new suppliers should use to contact them.

46% of fleet managers use one supplier for auxiliary lighting.

62% of respondents order auxiliary lighting inventory as needed. 28% keep a one-month supply onsite.

Frequency of auxiliary lighting service

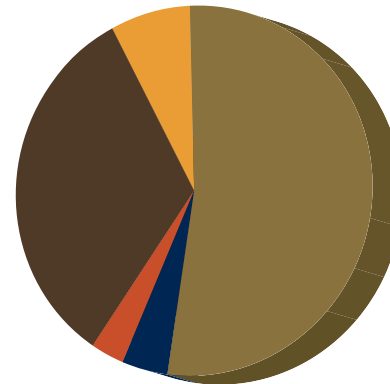
| | |
|--------------------|-----|
| Whenever needed | 79% |
| Every month | 5% |
| Every three months | 6% |

Some totals exceed 100 percent because respondents provided multiple answers. Others do not reach 100 percent because all answer options are not listed.

A FLEETING LOOK AT FLEETS

Preferred fleet suppliers

- National parts retailer 53%
- Dealership 4%
- Vehicle manufacturer 3%
- Warehouse distributor 33%
- Other 7%



Most important supplier qualities

| | |
|--------------------|-----|
| Parts availability | 74% |
| Fast delivery | 51% |
| Price | 47% |
| Customer service | 43% |
| Good relationship | 38% |

Most important auxiliary lighting qualities

| | |
|--------------|-----|
| Quality | 26% |
| Reliability | 22% |
| Price | 12% |
| Brand name | 12% |
| Availability | 11% |

76% of respondents order auxiliary lighting online 0-10% of the time.



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A FLEETING LOOK AT FLEETS

Water Pumps

16% of fleet manager respondents say they are open to switching water pump suppliers. Of those, 45% report email is the preferred method potential new suppliers should use to contact them.

32% of fleet managers use only one supplier for water pumps.

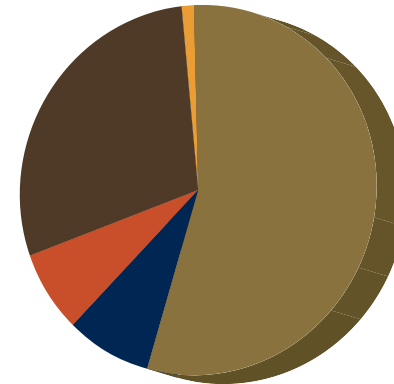
81% of respondents order water pumps as needed. 8% keep a one-month supply on-site.

Frequency of water pump service

| | |
|------------------|-----|
| Whenever needed | 92% |
| Every six months | 3% |
| Annually | 3% |

Preferred fleet supplier

- National parts retailer 55%
- Dealership 8%
- Vehicle manufacturer 7%
- Warehouse distributor 29%
- Other 1%



Most important supplier qualities

| | |
|--------------------|-----|
| Parts availability | 87% |
| Fast delivery | 48% |
| Price | 47% |
| Customer service | 40% |
| Good relationship | 29% |

Most important water pump qualities

| | |
|-------------|-----|
| Quality | 33% |
| Reliability | 17% |
| Price | 13% |
| Brand name | 13% |
| Warranty | 11% |

85% of respondents order water pumps online 0-10% of the time.

Some totals exceed 100 percent because respondents provided multiple answers. Others do not reach 100 percent because all answer options are not listed.

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