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MAY 2017

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# ISRAELI AFTERMARKET IS SMALL, BUT POISED TO GROW

BY RICHARD MEZADURIAN | Contributing Editor

There are few nations that have as close a relationship with the United States as Israel. However, political alliances don't necessarily translate into aftermarket sales opportunities for automotive parts and accessories.

Israel, a relatively small automotive market compared to others in the region, isn't particularly friendly to U.S. automotive exports. The exception to this might be in the military and para-military sector. So, while there are limited

opportunities to export, the Israeli aftermarket itself isn't very large.

Israel is slightly larger than New Jersey in size, but it's population, at approximately 8 million people, is slightly less than the Garden State's. The population demographics skew a bit younger, with 81 percent of the population being 55 and under. And with a life expectancy of 82.4

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## Analysis by market

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# Israeli aftermarket

“ The Israeli market consisted of nearly 3 million vehicles in operation in 2015. ”

years, Israel rank eleventh in the world in the longevity of its residents. (The U.S. ranks 42nd).

Israel's gross domestic product (GDP) of \$300 billion in 2016 was good enough to land 57th in the world, placing it just ahead of Greece, Hungary and Denmark. It's 2016 economic growth rate of 2.8 percent improved from the year earlier 2.5 percent. The Israeli economy is driven by its high tech and bio-medical research industries. Tourism and agriculture are also vital parts of the Israeli economy.

The Israeli automotive market is rather robust. The 10-year compounded annual growth rate (CAGR) has been 5.2 percent. That slightly lags the Middle East region which saw a CAGR of 7.1 percent. Sales in 2016 grew 12.5 percent from 2015, exceeding all expectations.

The market, as of 2015, stood at nearly 3 million vehicles in operation. The fastest growing segment, according to Israeli government statistics, is private passenger vehicles, which increased by nearly 1 million units from 10 years earlier. Private passenger cars represent 83.6 percent of the total vehicle parc. The balance of the market is split amongst trucks (10.4 percent), motorcycles (4.1 percent). Buses, taxis

and specialty vehicles make up the remainder.

Israel has an incredibly diverse vehicle population, with 46 different brands and 301 different models sold in 2016. There are, of course, a few perennial market leaders.

Asian brands have dominated the auto industry in Israel for many years, and 2016 was no exception. The 286,700 units sold in 2016 marked an incredible sales result, and for the market leaders, Hyundai and Kia, this has translated into a 27 percent combined market share. Toyota (10.5 percent), once a market leader, is now the perennial third-place finisher. Skoda (6.8 percent) and Mitsubishi (5.0 percent) round out the top five brands. The top 13 brands, out of the 46 brands sold in Israel, comprised 80 percent market share in 2016.

The car sales market in Israel is highly regulated by the government. There are only five companies that have the necessary licenses to import new vehicles into the country. Additionally, four different companies specialize in vehicle leasing. In these cases, leasing companies obtain cars from the five authorized ...CONTINUE READING ONLINE □

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# Advance Auto Parts training **ATTRACTS, RETAINS WORKFORCE**

By **JAMES E. GUYETTE** | News Correspondent

**S**ore staffers and repair center owners are enthusiastic about the wide selection of educational opportunities provided by Advance Auto Parts. The technician training programs can benefit a shop's bottom line with heightened revenues, and the in-house product- and sales-oriented instructional offerings steer Advance employees along an upwardly mobile career path.

“There's huge room for advancement at Advance Auto Parts,” according to B.J. Gray, a “commercial parts pro” working behind the counter at the Advance store on West Patrick Street in Frederick, Md.

“There's drivers who are now district leaders; there's people who came in as inventory specialists who are (now) trainers. It's a growing company, it's a great place to work,” she reports.

“You have to keep a level head,” Gray points out. “You have to be able to multi-task. This is customer service – that's all it is.” If you possess these types of attributes the company's training programs furnish the necessary knowledge to obtain a steady pattern of on-the-job success, promotions and per-

sonal workplace satisfaction.

“It's amazing,” says Gray, extolling the virtues of the ongoing training she has received. “There's a wide variety of different categories” of instruction. “It educates you on the value of the different product lines,” which in-turn enhances the ability to confidently discuss the technical aspects of auto repairs with your professional customers – and thus they are inclined to consistently grant your business first-call status.

## Filling in the gaps

“If you can get the job done faster, time is money,” asserts Kathy Lee Senft, vice president at A-1 Auto Service in Quincy, Fla. The shop regularly purchases parts from Advance, and the business has increased its profits by taking advantage of Advance's educational courses.

“We appreciate it very much! It's not like the fly-by-night training that comes along” from other instructional offerings geared more toward selling products rather than imparting useful repair knowledge.

In addition to her management responsibilities at A-1, “I am a technician ...**CONTINUE READING** □

## ASE GUIDES | **QUESTION OF THE MONTH**

**Parts Specialist A says a throttle body fuel injection system can have sequential fuel injection. Parts Specialist B says a multiport fuel injection system can have sequential fuel injection. Who is right?**

- A. Parts Specialist A only**
- B. Parts Specialist B only**
- C. Both A and B**
- D. Neither A or B**

**Click here to see the answer.**

## NACE AUTOMECHANIKA TRAINERS



**See what Randy Briggs will teach in July**



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# VENDORS

## Canadian aftermarket keeps on rolling as ‘a well-oiled machine’

BY JAMES E. GUYETTE  
News Correspondent

President Donald Trump’s stated disdain for the North American Free Trade Agreement (NAFTA) has mostly been directed at Mexico rather than Canada, yet Canadian industry executives are a bit uneasy and uncertain over business relations with their U.S. counterparts should Trump’s ire start targeting the northern neighbor.

**TRENDS & MARKET Analysis**

Having been humming along in comfortable coexistence across the world’s longest unfortified international boundary since Canada began producing Ford Model Cs in 1904, a possible trade war could gum up the works for Canadians and Americans alike. According to KPMG, a given part or sub-assembly may traverse the Canada-U.S. border up to seven times before finally being affixed to a vehicle.

This rather astounding statistic, plus a recent encouraging meeting among Trump and Prime Minister Justin Trudeau, present further evidence “recognizing the partnership between the U.S. and Canada and how integrated the two countries are,” says Jean-François

Champagne, president of the Automotive Industries Association (AIA) of Canada, which represents the north-of-the-border aftermarket.

Aftermarket businesses in Michigan and Ontario are especially intertwined. “Most of the distribution outlets are operating on both sides of the border,” he reports, creating concerns over the ramifications of a renegotiated NAFTA and/or American implementation of a BAT, the border adjustment tax proposal that has been floated by the Trump Administration. Canada could be compelled to react with in-kind economic penalties should any restrictive initiatives become reality.

“We don’t see that as a positive for either the Canadian or American auto industry,” says Champagne, reflecting on the BAT. “With our highly integrated economies it would impact U.S. jobs. It would impact manufacturing capabilities for both the U.S. and Canada,” resulting in higher prices for vehicle and component purchasers on either side of the border.

Global implications are in play as well with NAFTA and the BAT. “Parts come from all over the world” into the two nations. For example, Mexico – the other NAFTA signatory – is also heavily involved in the continent’s automotive network.

“A sub-assembly may traverse the Canada-U.S. border up to seven times before being affixed to a vehicle.”

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Regarding NAFTA, Trump’s tweets seem to suggest that a mere tweaking may be in the offing. “It might modernize the agreement,” Champagne observes. “It’s hard to articulate until we know more about the tweaking,” although a sense of unease remains.

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# LOGISTICS/CONNECTIVITY

## Uber, Amazon and others will connect shippers directly to truckers

BY BRIAN ALBRIGHT  
Correspondent

Uber, Amazon and a number of other technology companies and freight forwarders are poised to significantly alter the logistics landscape over the next several years by directly connecting shippers and drivers.

Uber has made two major moves into the freight industry over the past year – launching a self-driving truck project and debuting its new Uber Freight service at the end of December 2016.

### TRENDS & MARKET Analysis

In late 2016, Uber’s self-driving truck subsidiary Otto successfully hauled a truck filled with 45,000 cans of Budweiser on a 120-mile trip across Colorado. The driver remained in the truck’s sleeper berth to monitor the trip, and only had to take the wheel while the truck was entering or exiting the freeway.

A number of other companies have also entered the self-driving truck market, including Embark, Drive.ai, and Starsky Robotics. Google’s former self-driving car spin-off Waymo has filed suit against Uber and Otto claiming that Otto CEO Anthony Levandowski and other former

Waymo employees stole trade secrets from the Google project to launch Otto.

Self-driving trucks could potentially make transportation safer and more efficient, since the trucks could continue to operate even without the driver at the wheel. For that to work in the long-haul industry, however, would require adjustments to U.S. Department of Transportation hours of service rules. And there could be pushback from drivers, unions and safety advocates.

It’s the Uber Freight division, however, that has other freight forwarders and third-party logistics companies nervous. The service provides a platform for shippers and truckers to broker shipping orders with each other.

The company is launching a marketplace to connect shippers with a truck, along with pricing in real-time that is based on supply and demand. That could mean the same types of pricing spikes that occur during peak demand times for regular Uber drivers.

Uber isn’t the only company trying to bring automation to freight brokerage. Freight management solution provider GlobalTranz Enterprises recently announced it increased its EBITDA by 84 percent in the past year, with a five-year compound annual growth rate of 32 percent.

“Our technology platform is bringing a new level of inno-

“It’s the Uber Freight division that has other freight forwarders and third-party logistics companies nervous.”

### NACE AUTOMECHANIKA CHICAGO COURSE SPOTLIGHT

#### WHY ALTERNATIVE FUEL VEHICLE TRAINING IS IMPORTANT FOR SHOP PERSONNEL, FLEET MANAGERS

AFVs are becoming more common every day. Bill Davis of NAFTC explains why everyone involved in the maintenance of vehicles needs to understand how to safely and accurately deal with these vehicles.



This session will include information that will allow fleets and repair facilities to begin the safe transition to alternative fuel vehicles.

[Read about this course](#)

vation to the freight brokerage market,” says Bob Farrell, the company’s CEO. “Shippers, carriers and freight agents are responding to that by bringing their freight management business to GlobalTranz and looking to us to provide ...CONTINUE READING ▢

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# TELEMATICS/CONNECTIVITY

## Automotive IoT, connected car modules face rapid growth

BY BRIAN ALBRIGHT  
Correspondent

The market for connected car and automotive Internet of Things (IoT) technology is poised for growth, even as the federal government and different segments of the industry tussle over technology standards.

According to a new report from Mobile Experts (Automotive IoT Devices 2016), the overall wireless IoT module shipments for automotive will triple from 200 million in 2015 to more than 600 million in 2021. There will be multiple radios used in each vehicle, and revenue from those modules will grow from \$6 billion to \$10.9 billion in 2021.

### TRENDS & MARKET Analysis

Semiconductor shipments for automotive IoT will grow roughly \$5 billion in 2021.

The report covers telematics, vehicle-to-vehicle (V2V), vehicle-to-infrastructure (V2I), and IoT applications that use dedicated short range communications (DSRC), tire pressure monitoring systems (TPMS), and 4G/LTE wireless technology. It also explores usage based insurance

(UBI) and proposed 5G wireless technology.

The report also clarifies the difference between autonomous cars (which use sensors to control the vehicle) and connected cars, which use a mix of GSM, 3G, and LTE wireless networks to share data for maintenance and emergency communications.

The industry and federal government also hope to see increased use of V2V and V2I technology in order to increase safety through having cars communicate road conditions and traffic hazards to each other automatically, with the vehicles responding to those conditions faster than the driver can.

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“A proposed mandate for V2V technology that was raised during the Obama administration is on hold.”

### NACE AUTOMECHANIKA CHICAGO COURSE SPOTLIGHT

#### ADVANCED DRIVE ASSISTANCE SYSTEMS (ADAS): DIAGNOSTICS AND CALIBRATION

Steve Zack and Duane Watson of Bosch will discuss all facets of the new vehicle safety systems, from lane departure to throttle control to automated braking. Technicians will learn about new ADAS systems with demonstrations on forward facing camera alignment calibration for lane departure systems and diagnostic procedures to troubleshoot and repair ADAS systems.



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Because of this delay, any mandate will likely not affect production vehicles until 2021. That delay also will exacerbate the conflict between different stakeholders who would like to see different technologies mandated. **...CONTINUE READING ONLINE**

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# VENDORS

## Bob Cushing explains Advance's marketing, management programs

BY JAMES E. GUYETTE  
News Correspondent

Bob Cushing, executive vice president, professional at Advance Auto Parts, was honored at the 2016 AAPEX Show in Las Vegas by being presented with the highly acclaimed Import Vehicle Community Hall of Fame award.

Prior to being promoted to his current position at the company, Cushing joined Advance with the acquisition of General Parts International (GPI), which included the WORLDPAC subsidiary. He had served in several WORLDPAC roles since 1999, culminating in being named president and CEO in 2008.

### TRENDS & MARKET Analysis

Cushing, who had previously held executive-level positions at Metrix Parts Warehouse, Interco Parts Corp. and Robert Bosch Corp., recently answered a series of questions from Aftermarket Business World about the marketing and management programs that Advance offers to its commercial customers:

**Q:** What does your TECHNET program entail?

**A:** TECHNET Professional Auto Service is Advance's banner program for independent repair facilities

across the country that provides marketing programs, access to instructor-led and online training, warranty programs and more.

Put simply, TECHNET exists to help independently owned repair facilities provide quality service, grow their business and compete with larger chains while maintaining their shop's own identity. The number of independent repair facilities that are TECHNET locations has grown tremendously in recent years – to the point that Advance now counts more than 9,000 TECHNET member shops.

We are constantly improving offerings and adding benefits for TECHNET members, from expanding nationwide warranty programs available via TECHNET to forming regional TECHNET Councils where shop owners can



BOB CUSHING

meet to share wisdom, training or issues they are facing in the market; and offering sales training programs for new service advisers. Much more information can be found at [www.technetprofessional.com](http://www.technetprofessional.com).

**Q:** What are the key elements of your MotoSKILL Shop Tech Training program?

TECHNET Professional Auto Service is Advance's banner program for independent repair facilities.

### NACE AUTOMECHANIKA CHICAGO COURSE SPOTLIGHT

#### AUTOMOTIVE HVAC SYSTEMS: ESSENTIAL DIAGNOSTICS

In this class Jim Cokonis of CTI offers a foundation of essential HVAC diagnostic procedures, based on diagnostic best practices, to assure correct and complete diagnostic conclusions of common HVAC failures. Topics include temperature and pressure testing, the diagnosis of compressor clutch controls, PWM fan diagnostics and variable displacement compressor controls.



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**A:** MotoSKILL Shop Tech Training is a technology solution that Advance makes available to shops seeking a training program that is primarily video-based and available on-demand.

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# Effective repair negotiation STARTS WITH EDUCATION, TRAINING

I've been receiving a lot of positive feedback about my "Achieving, maintaining OEM certifications will be key to sustainability" column. People ask me, "What's next, and how do we communicate the information in your article to insurers?" My suggestion is to educate your insurers by using the documents

and processes available to you.

I was in a shop recently and overheard an estimator talking with an insurance adjuster about using a used quarter panel to repair a vehicle. The estimator referred to a statement from an OEM position paper

stating that used weld-on panels are not recommended for use in collision repairs. The insurance adjuster said that wasn't good enough because it was only a recommendation and not a requirement.

We can argue the meaning of recommendation, but the estimator had a better justification available to him, he just didn't know it. So I stepped in and acted as a mediator. I asked the estimator to look up the repair procedures for quarter panel replacement on the vehicle. As the three of us reviewed the process we found that the OEM required the quarter panel to be resistance welded during replacement.

During this education process the insurance adjuster learned it would be impossible to resistance weld an LKQ quarter panel after a spot weld cutter was used to remove it from the donor vehicle. I asked the estimator to copy and paste that statement into the line note after selecting an OEM quarter panel as the method of repair.

This statement provided the justification the insurance adjuster needed to explain to his supervisor why the OEM quarter was selected. Knowing the OEM repair procedures proved beneficial in this discussion, and using the cited repair process allowed the repair to move forward with little or no debate. I believe insurance adjusters are just like you and me, they have to report to a supervisor and need to be able to justify what they allow on a damage appraisal.

As we move through the wave of change I talked about in my earlier article we need to rethink the way we discuss repairs with insurers. We need to step

The estimator had a better justification available to him, he just didn't know it.

away from negotiating a repair based on opinion and desire, to educating how a repair should be accomplished using OEM processes.

Once upon a time the collision repair facility was ...**CONTINUE READING** □

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### Alan R. Segal

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### Stephen Barlas

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### Jay Wright

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**JOHN SHOEMAKER**  
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BASF North America



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# Is Amazon auto parts **A FRIEND OR FOE?**

An article in the New York Post by Josh Cosman reported how Jeff Bezos and Amazon plan to become an even more significant player in the do-it-yourself auto parts and accessory market. With total revenue of \$128 billion in the 12 months ending September 30, analysts project Amazon's goal is to grow its auto parts business by 50 percent this year to \$5 billion. Those numbers are why Amazon is the gorilla in the room when any industry discusses e-commerce and online retailing.

No single topic fuels more passionate debate from boardrooms to classrooms and spilling over into cocktail receptions – where some of the most insightful observations can be heard. Yet, with all this energy being invested in the discussion of a competitor, little consensus has been reached on whether selling to or through Amazon is a good business strategy or a short path to certain doom.

Can you find successful automotive

businesses that are convinced Amazon is a strategic friend? Yes. And, are there equally successful automotive businesses that recoil at the thought of partnering with Amazon in any fashion? Certainly.

I am fortunate to have enjoyed a long career in the automotive parts and accessories business. I attended my first AWDA conference in the early 1980s. In those years, the store count for chains like AutoZone, Advance Auto Parts and O'Reilly were measured in the hundreds. But, the fear and suspicion with which they were viewed was off the chart. There was certainly discussion about how to limit their involvement and participation in industry events and association governance.

As recently as this decade, a collaborative point-of-sale data sharing program was undone by the suspicion of the traditional parts channel participants that the retailers were going to gain assortment insights and become more successful at the expense of the wholesalers. "If we share this data, then they'll use it to take

share from us. Therefore, we're pulling out of the program" ... ensuring that no one can benefit from an industry-wide category management pool.

Today's Amazon is yesterday's AutoZone. They don't feel an obligation to do things the way they've always been done. And they are constantly innovating to hone in on those things that customers value the most (reviews and ease of shopping) and eliminate the things that are not valued (shipping charges). After all, if you are still requiring that your customer pay for services and expenses that they don't value, they will find someone else. But, if there is value in those services, you've got to remind them of what's built into

your price. It's called marketing.

In the search for continuous improvement and exceeding customer expectations, the channel is continuously evolving and seeking even more efficient ways of getting what is needed to the point of consumption in the fewest ...**CONTINUE READING** □



**SCOTT LOCKETT**  
VP, Industry Strategy  
GCommerce Inc.



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# Amazon's digital winds encircle **COMMERCIAL REPAIR SHOPS**

Amazon.com is kicking into full gear — including lucrative supplier contacts to help them corner the \$50 billion do-it-yourself (DIY) auto-care segment. When the New York Post published an article in January, they portrayed it as bad news for the national retailers, who could lose their DIY base to Amazon.com.

However, while investors, the press and many industry executives are preoccupied with this DIY threat, they should not downplay Amazon.com's interest in the commercial repair shops, which represents \$95 billion in market share. They should also entertain the strong possibility that Amazon.com may need a partner to connect them to the industry's tech-savvy repair shops.

On February 8, O'Reilly Auto Parts' CEO Greg Henslee told Wall Street investors that he isn't afraid of Amazon.com's entry into the DIY segment. "Unlike an online site, a parts store employee can narrow a problem down to a single diagnosis. Given the complexity of selecting parts and repairing vehicles that DIYers face," Henslee said, "we'll get them lined up with a technician to help solve their problem if they can't."

Two dozen industry experts interviewed for this column agree that parts stores like O'Reilly Auto Parts,

one of the industry's largest, are better suited to identify and recommend the right item than an online site such as Amazon.com. Managers who work for warehouse distributors, manufacturers and consulting firms also noted that an online store may struggle to handle product warranties and labor claims. Most parts stores have in-house customer service processes set in place that allow them to haggle with their suppliers, which can take months to settle.

Currently, Amazon.com is far off from serving every marketplace with same-day and one-hour delivery. According to their 2015 annual report, this service is limited to about 30 cities worldwide, which is not enough to win the daily trust of thousands of repair shops that need products quickly while the vehicle is on the lift. As Henslee pointed out, when there's a high immediacy of need, the nation's 36,500 auto parts stores can deliver their products faster.

Manufacturers and consultants contend that Amazon.com and their traditional brick-and-mortar rivals are competing in an evenly priced marketplace. Five years ago, Dorman Products unveiled Minimum Advertised Pricing, where sellers can lose their license to sell products if they advertise a resale price below a set figure.

“Amazon is far off from serving every marketplace with same-day and one-hour delivery.”

Mike Fitzgerald, a sales executive for Innova, explained that they price their products up to 30 percent higher to all of their online customers to prevent them from undercutting their physical competitors.

With these arguments in mind, consider why Amazon.com is capable of giving the likes of O'Reilly Auto Parts fits over losing some commercial business. For starters, by signing contracts with major brands like Dorman Products, Cardone, Bosch and Federal-Mogul, Amazon.com may have a better shot at selling brakes, chassis and ignition parts directly to the shop technician, who is less dependent on a counter person for advice.

As well, given the scale of contracts of billions of dollars at stake, it would be naïve to presume that topics such as claims, delivery, pricing and troubleshooting were ignored when the suppliers were negotiating with Amazon.com. Although Amazon.com has never provided

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**ALAN R. SEGAL**  
President,  
Best Business Practices

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# NHTSA's distracted driving GETS INDUSTRY CRITICISM

“It is not only the Consumer Technology Association whose comments have been scathing.”

There has been a torrent of criticism directed at the National Highway Traffic Safety Administration's (NHTSA's) draft of distracted driving guidelines for the aftermarket.

NHTSA published its second (Phase 2) of three anticipated distracted driving guidelines at the end of November 2016. The final guidelines for OEMs (Phase 1) was published a few years ago.

NHTSA held a public meeting with groups in 2014 to get input into the portable aftermarket device (PAD) guidelines, but somehow published a draft that nearly every industry segment opposes for one reason or another.

Gary Shapiro, president and CEO of the Consumer Technology Association (CTA), says, "The prescriptive technology recommendations set forth in the proposed guidelines are simply unworkable in today's mobile ecosystem."

The Phase 2 draft attempts to build on Phase 1, which established recommended acceptance criteria for driver glance behavior where single average glances away from the forward roadway are two seconds or less and where the sum of the durations of all individual

glances away from the forward roadway are 12 seconds or less while performing a testable task, such as selecting a song from a satellite radio station.

The proposed Phase 2 guidelines present two concurrent approaches for mitigating distraction associated with the use of portable and aftermarket devices by drivers. The first describes certain tasks that would be "locked out" where the portable and OE in-vehicle systems are designed so they can be easily paired to each other and operated through the OE in-vehicle interface. This is the "Pairing" option."

Those locked out tasks include: displaying video not related to driving; displaying certain graphical or photographic images; displaying automatically scrolling text; manual text entry for the purpose of text-based messaging, other communication, or internet browsing; and displaying text for reading from books, periodical publications, Web page content, social media content, text-based advertising and marketing, or text-based messages.

The second option is based on what is called the "Driver Mode," which would be a simplified interface when the device is being used unpaired while driving,

either because pairing is unavailable or the driver decides not to pair. The agency's preference is for the Driver's Mode to be automatically activated when: (1) the device is not paired with the in-vehicle system, and (2) the device, by itself, or in conjunction with the vehicle in which it is being used, distinguishes that it is being used by a driver who is driving.

It is not only the CTA whose comments have been scathing. "The consistent implementation of an unpaired Driver Mode may be difficult given the wide variety of approaches," says Steven H. Bayless, vice president, Regulatory Affairs and Public Policy, Intelligent Transportation Society of America.



STEPHEN BARLAS  
Washington Correspondent

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# Water pump startup establishes **ONLINE AUTO PARTS PRESENCE**

**E**stablishing your business as a top-tier automotive parts supplier is a tall order, especially when you're just starting out. Water pump startup NovaPacific had everything in place to make sure it developed high-quality auto parts.

But to help customers find the correct part for their application and provide ACES files to support customers and eCat providers, NovaPacific turned to Vertical Development. With the ShowMeTheParts database system, NovaPacific could get accurate information to customers while still being able to add to its growing portfolio of parts.

NovaPacific offers water pumps that are ISO/TS 16949:2009 and TÜV certified to ensure the highest level of quality control. Their kaizen-based production process aims at achieving defect-free products while being able to maintain 99 percent fill rates for customer orders. Since opening about one year ago, NovaPacific has expanded its offerings to cover nearly 98 percent of the light-duty vehicles on the road. That includes 227 SKUs introduced in just the past two months, increasing the total offerings by more than 30 percent.

When NovaPacific saw the capabilities of ShowMeTheParts, the company decided it was the

best way to get parts information from its broad portfolio into the hands of thousands of potential buyers.

Vertical Development created ShowMeTheParts as an online complement to its catalog mapping services. It's a large public parts database offering millions of entries with interchange information, specifications, data sheets, photographs and three-dimensional views. All this information is accessible online through a web interface that works on computers and mobile devices. The system is scalable, allowing retail businesses, distributors and manufacturers like NovaPacific to use ShowMeTheParts in a form that best fits their needs.

## How does the integration work?

ShowMeTheParts uses an HTML5-based front end with an API that integrates with existing sites, which means both current and prospective customers can visit NovaPacific's website and look up parts information from any modern browser.

The database gives users four ways to find the information they need for ordering, letting them find what they need without having to contact customer service. Customers search for parts by the vehicle model: once the correct model, year, trim, and other options are

NovaPacific's water pumps cover nearly 98 percent of the light-duty vehicles on the road.

selected from the menu, the database shows compatible part numbers. Compatible parts also can be found using the vehicle's VIN, which eliminates confusion about trims, engines and other components that can help determine which pump is correct for an application. Since the VIN is etched onto the vehicle and printed on auto insurance cards, it's easy for customers at parts stores and mechanics to find.

Searches also can be done based on the part itself. A cross-referencing option can find the right NovaPacific part based on the part numbers from other suppliers, while the "Part Search" option displays all the compatible vehicles for an SKU. Both options make it easy to find a replacement part and helps stores and warehouses ensure local coverage.

NovaPacific's customers say they like how ShowMeTheParts gives them the ability to access  
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**JAY WRIGHT**  
President  
Vertical Development

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# AUTOZONE AGAIN CLAIMS NO. 1 SPOT IN TOP 25 REPORT

## INDUSTRY CONSOLIDATION RESHAPES LIST OF LARGEST AUTO PARTS SUPPLIERS

BY BRUCE ADAMS | MANAGING EDITOR

For the third consecutive year AutoZone claimed the top spot in the annual Aftermarket Business World Top 25 Auto Chain Report, which lists companies by their number of company-owned stores in North America. AutoZone increased its North American store count to 5,806 this year from its industry-leading 5,644 figure in last year's report.

Also for the third consecutive year, Advance Auto Parts ranked No. 2, this time with 5,189 company-owned stores in North America. That figure does not include approximately 1,250 independently owned Carquest locations that Advance serves,

pushing their total number of locations to more than 6,400.

O'Reilly Automotive came in third once again with 4,829 company-owned stores in North America, an increase from 4,571 in last year's report. After the top three, the number of stores drop off sharply as Genuine Parts Company finished fourth with 1,368 company-owned stores in North America.

Icahn Automotive Group LLC, parent company of Pep Boys and Auto Plus, placed fifth with 1,228 company-owned stores in North America. The company has more than 4,000 company-owned and independently owned stores and service centers.

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### 1 AUTOZONE INC.

123 South Front Street  
Memphis, TN 38103  
Phone: (901) 495-6750  
www.AutoZone.com  
CEO/President:  
William C. Rhodes III

**Program Group**  
**Affiliation:**  
None  
**Owned stores:** 5,806  
**Employees:** 84,000  
**Retail:** 80%

**Commercial:** 20%  
**Sales:** \$10.6 billion (2016)  
**Estimated Sales (2017):** NA

AutoZone continues implementation of its inventory availability initiatives. At the end of the quarter ending Feb. 11, 2017, the company expanded its increased frequency of distribution center deliveries initiative to 2,200 domestic AutoZone stores. After opening five Mega Hubs in 2016, AutoZone expects to open five additional Mega Hubs by the end of the fiscal year. During the quarter ending Feb. 11, 2017, AutoZone opened 33 new stores in the U.S., three new stores in Mexico and one in Brazil.

### 2 ADVANCE AUTO PARTS

5008 Airport Road  
Roanoke, VA 24012  
Phone: (877)-advance  
www.advanceautoparts.com  
CEO/President:  
Tom Greco

**Program Group**  
**Affiliation:**  
None  
**Owned stores:** 5,189  
**Employees:** 74,000+  
**Retail:** 42%

**Commercial:** 58%  
**Sales:** \$9.57 billion (2016)  
**Estimated Sales (2017):** NA

In 2016, Advance Auto Parts made substantial changes to its strategy and approach to execution to put its do-it-yourself (DIY) and professional customers at center stage. The long-term strategy is focused on: • building an advantaged supply chain; • ramping up sales and service capabilities to professional customers; • strengthening DIY business by improving customers' in-store and online experience and building stronger loyalty through its Speed Perks program, which now has more than 16 million members; • fueling growth through a focus on productivity that will help improve profits and remove costs without impacting customers.

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**3 O'REILLY AUTOMOTIVE INC.**

233 South Patterson Ave.  
Springfield, MO 65802  
Phone: (417) 862-6708  
www.oreillyauto.com  
CEO: Greg Henslee

**Co-presidents:** Jeff Shaw, Greg Johnson  
**Program Group Affiliation:** None  
**Owned stores:** 4,829

**Employees:** 74,580  
**Retail:** 58%  
**Commercial:** 42%  
**Sales:** \$8.6 billion (2016)  
**Estimated Sales (2017):** \$9.2 billion

O'Reilly completed its purchase of Bond Auto Parts, which operated 48 stores in New England, on Dec. 2, 2016. Bond ranked No. 15 in the 2016 AMBW Auto Chain Report. O'Reilly announced record revenues and earnings for the year ended Dec. 31, 2016. The results represent 24 consecutive years of comparable store sales growth and record revenue and operating income since becoming a public company in April 1993. Sales increased \$626 million, or 8%, to \$8.59 billion from \$7.97 billion. Gross profit increased to \$4.51 billion (or 52.5% of sales) from \$4.16 billion (or 52.3% of sales), representing an increase of 8%.

**4 GENUINE PARTS COMPANY**

2999 Wildwood Parkway  
Atlanta, GA 30339  
Phone: (678) 934-5000  
www.genpt.com  
CEO/President: Paul Donahue

**Program Group Affiliation:** NAPA  
**Owned stores:** 1,368 (North America only)  
**Employees:** 39,600

**Retail:** 25%  
**Commercial:** 75%  
**Sales:** \$8.1 billion (2016, automotive group only)  
**Estimated Sales (2017):** N/A

The Automotive Group, Genuine Parts Company's largest segment at 53 percent of 2016 revenue, reported a 1% sales increase for the year. Each of its four geographic regions, the U.S., Canada, Mexico and Australasia, generated positive total sales increases in their local currencies, with the strongest growth in the international markets.

**5 ICAHN AUTOMOTIVE GROUP (PEP BOYS & AUTO PLUS)**

1155 Roberts Blvd. Ste. 175  
Kennesaw, GA 30144  
Phone: (770) 701-5000  
www.icahnautomotive.com  
www.autoplusap.com  
www.pepboys.com

**CEO:** Daniel Ninivaggi  
**Program Group Affiliation:** N/A  
**Owned stores:** 1,228

**Employees:** Approximately 20,000  
**Retail:** NA  
**Commercial:** NA  
**Sales:** NA  
**Estimated Sales (2017):** NA

Recent acquisitions include •Greene's Auto Parts – April 2016; • Industrial Engine & Supply Inc. – April 2016; • Leicester Auto Parts – July 2016; • Hapi Auto Parts – August 2016; • Automotive Electric Distributors – September 2016; • Circle City Auto Parts – December 2016; • Just Brakes – January 2017. Icahn Automotive Group Presidents are Bill Ihnken, President, Service; Brent Windom, President, Commercial; and Wade Sharp, President, Retail/Tires.

**6 FISHER AUTO PARTS**

512 Greenville Ave.  
Staunton, VA 24401  
Phone: (540) 885-8901  
www.fisherautoparts.com  
CEO: Bo Fisher

**Presidents:** Gary Shifflett, Herb Godschalk  
**Program Group Affiliation:** Federated (The Group)  
**Owned stores:** Approximately 500  
**Employees:** 4,500+  
**Retail:** 25%  
**Commercial:** 75%  
**Sales:** NA  
**Estimated Sales (2017):** NA

Fisher Auto Parts acquired six Gipe Auto Parts company stores in Kentucky and Indiana in October 2016. The Gipe acquisition did not include the automotive refinishing and industrial coatings division. Gipe Auto Color continues operations with eight locations owned and managed by the Gipe family. KOI Auto Parts was consolidated into Fisher Auto Parts on April 1, 2017. Fisher had acquired controlling interest in KOI on April 1, 2014. At the time of the deal, KOI had 72 locations with revenue of \$200 million heavily concentrated in three states: Kentucky, Ohio and Indiana.

**7 UNI-SELECT INC.**

170 Industriel Blvd.  
Boucherville, Quebec  
J4B 2X3  
Phone: (450) 641-2440  
www.uniselect.com

**CEO/President:** Henry Buckley  
**Program Group Affiliation:** N/A  
**Owned stores:** Approx. 255

(includes Finishmaster)  
**Employees:** 3,000  
**Retail:** NA  
**Commercial:** NA  
**Sales:** \$1.2 billion (2016, includes Finishmaster)

Uni-Select is a distributor in two large automotive markets – paint and related finish products, and automotive aftermarket parts. In the U.S., its paint and related products segment operates under the Finishmaster brand and holds the top market position. Automotive Canada distributes parts through its network of independent and corporate stores under the Bumper to Bumper and Auto Parts Plus brands, holding the number two position in Canada. In its 2016 annual report, the company reported more than 205 corporate Finishmaster locations and more than 150 Bumper to Bumper stores, of which approximately one-third are corporate stores.

**8 REPLACEMENT PARTS INC.**

1901 E. Roosevelt Road  
Little Rock, AR 72113  
Phone: (501) 372-5275  
www.BTBAutoParts.com  
CEO/President: Bill Schlatterer

**Program Group Affiliation:** The Alliance  
**Owned stores:** 177  
**Employees:** 2,184  
**Retail:** 20%

**Commercial:** 80%  
**Sales:** \$222 million (2016)  
**Estimated Sales (2017):** \$232 million

Replacement Parts Inc. is structured around traditional auto parts stores operating under the Alliance "Bumper to Bumper Auto Parts" banner, "CarColor Specialty" and "CarDealer Parts" stores, and traditional jobber distribution. In 2016, the company added five stores. While actively engaged in the purchase or conversion of regional competitor stores, the company also is aggressively pursuing various other niche opportunities in its market. RPI continues to incorporate inventory optimization technology afforded by the Alliance group into its own proprietary inventory planning and store management systems.

**9 AUTO-WARES GROUP OF COMPANIES**

440 Kirtland SW  
Grand Rapids, MI 49507  
Phone: (800) 444-3121  
www.autowares.com  
CEO: Fred Bunting

**President:** Todd Leimenstoll  
**Program Group Affiliation:** The Alliance  
**Owned stores:** 172

**Employees:** 2,080  
**Retail:** 20%  
**Commercial:** 80%  
**Sales:** \$323 million (2016)  
**Estimated Sales (2017):** \$330 million

Auto-Wares Group of Companies acquired 13 locations in 2016: three in Illinois, six in Michigan, three in Wisconsin and one in Indiana. There are multiple pending acquisitions in 2017. Auto-Wares conducted 2017 Tech and Parts Store Expos in Grand Rapids, Mich., and Milwaukee. The company trained more than 3,945 auto industry professionals. Both events also featured a 250-booth trade show. The entire Auto-Wares sales team is now equipped with Sales-i business intelligence software.

**10 AUTOMOTIVE PARTS HEADQUARTERS**

2959 Clearwater Road  
Saint Cloud, MN 56301  
Phone: (320) 252-5411  
www.autopartshq.com  
CEO/President: Corey Bartlett

**Program Group Affiliation:** The Alliance  
**Owned stores:** 124  
**Employees:** 1,200  
**Retail:** 30%

**Commercial:** 70%  
**Sales:** \$112 million (2016)  
**Estimated Sales (2017):** \$145 million

In January 2017, APH acquired 22 Hedahls Auto Parts locations and three Benco Equipment locations, which were owned by Hedahls. In July 2016, APH acquired UESCO Warehouse's two locations in North Dakota. New independent customers also joined APH. Several product category improvements, including growth in the Heavy Duty and Medium Duty program, have been made. APH further invested in technology and training for the sales team, which resulted in a significant number of new Certified Service Centers. APH continued expanding its PBE and Tool & Equipment programs, which will further develop with the integration of Benco.

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COMPANY	CO.-OWNED STORES	WHOLESALE/RETAIL %	2016 SALES	CEO/PRESIDENT	LOCATION	PHONE	PROGRAM
11 Hahn Automotive Warehouse	94	80/20	\$212 million	Eli Futerman/Dan Chessin	Rochester, NY	(585) 235-1595	The Alliance
12 XL Parts	73	100/0	\$255 million	Mike Odell	Houston, TX	(713) 983-1100	Pronto
13 Arnold Motor Supply	58	80/20	Not available	Dennis Spooner	Spencer, IA	(712) 262-1141	The Alliance
14 Auto Tire and Parts	50	75/25	Not available	John Tlapek/Greg Stroup	Cape Girardeau, MO	(573) 334-9131	NAPA
15 SAE Warehouse Inc.	49	67/33	\$65 million	Tim Sturdevant	Sioux Falls, SD	(605) 362-6970	Pronto
16 Arnold Oil Company	45	70/30	\$100 million+	Jim Arnold	Austin, TX	(512) 476-2401	Federated
17 The Parts House	44	98/2	\$100 million+	David Honig	Jacksonville, FL	(904) 731-3034	The Network
18 Eagle Auto Parts	42	60/40	Not available	Garry Castles	Fort Worth, TX	(817) 834-5559	The Network
19 Automotive Supply Associates	39	80/20	Not available	David T. Segal/Bobby Segal	Concord, NH	(603) 225-4000	The Network
20 Walker Auto and Truck Parts	38	85/15	\$42 million	Dan Walker	Raleigh, NC	(919) 833-8955	NAPA
21 Bennett Auto Supply	34	70/30	\$68 million	Harold Bennett	Pompano Beach, FL	(954) 335-8700	The Alliance
22 Car Parts Warehouse	31	75/25	\$90 million	Tony Di Fiore	Brookpark, OH	(216) 676-5100	Parts Plus
23 Jobber's Auto Warehouse	26	75/25	\$32.6 million	Bob Evans	Wichita, KS	(316) 267-4393	The Alliance
24 ABC Auto Parts	25	60/40	\$60 million	Larry Pyle	Longview, TX	(903) 232-3060	The Alliance
24 Barron Service Parts	25	70/30	\$50 million+	Fred Barron/Mahlan LeBlanc	Odessa, TX	(432) 332-7120	NAPA
24 Brooks Auto Parts	25	75/25	Not available	(Don) Elton D. Brooks Jr.	Douglas, GA	(912) 384-7818	NAPA



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Fluid Control Division

## POLYETHYLENE FUNNELS



#32002



#32006

Model	Capacity	Color	Top ID	Spout OD	OA Height	Spout Length	Black Color
32090	1-Pint	Red	4 1/2"	1/2"	6 1/8"	2 1/4"	#32093
32091	Similar to #32090 Except with 50 Micron Screen						#32092
32001	2-Quart	Red	6 1/2"	1 1/16"	8 1/2"	2 3/8"	#32004
32002	Similar to #32001 Except with 60 Micron Screen						#32003
32005	6-Quart	Red	8 1/4"	1 5/16"	10 1/2"	1 5/8"	#32008
32006	Similar to #32005 Except with 60 Micron Screen						#32007



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