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PANAMA AFTERMARKET

Central America has matured into a stable, lucrative market

BY RICHARD MEZADURIAN | Contributing Editor

For decades, when deciding on where to focus their marketing attention, Central America never seemed attractive as an aftermarket opportunity to sales executives. The vehicle populations were relatively small, the political and economic conditions hazardous, and the rules governing imports were a plethora of contrary regulations that made it difficult to harmonize a sales and distribution strategy throughout the region.

While it has gone mostly unnoticed during the past 20 years, Central America has matured

into a vibrant, stable and lucrative market. Yes, even for the automotive aftermarket.

The development of the market shouldn't surprise anyone who's kept close watch of the region. The primary driver of this turnaround has been economic growth. As a sub-region, Central America was expected to grow 4 percent in 2016, as opposed to a .5 percent economic contraction in Latin America. The countries

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Analysis by market

TECHNOLOGY

Telematics: OEMs take multi-faceted tech approach to gain aftermarket share.

REPLACEMENT

Vendors: 4-H participation prepares youths for STEM-type aftermarket careers.

INTERNATIONAL

Business: U.S. Export-Import Back dispenses aid to cash in on global sales.

TECHNOLOGY

Logistics: International trade, e-commerce demands drive growing use of 3PLs.

Research

Fleet Study: Owners and managers of repair facilities that service fleets speak out about their product purchasing habits and preferences.

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COMMITMENT TO TRAINING

The Next Generation: Connecting with youngsters today enhances recruitment opportunities tomorrow.

Health Risks: Contaminated flood cars pose risks to repairers, consumers.

AFTERMARKET BUSINESS WORLD (Digital ISSN 1938-0593) is published 12 times yearly by UBM 131 W First St., Duluth MN 55802-2065. Subscription rates: digital only \$65 for 1 year.

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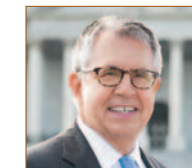
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Opinion



John Shoemaker
Achieving profitability through parts control

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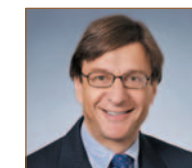
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Panama aftermarket

“In today’s political climate, free trade agreements often are viewed with skepticism, if not outright derision.”

that make up Central America include Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama. But within those seven countries, growth rates could vary dramatically.

In 2016, Panama grew its gross domestic product (GDP) by 5 percent, which led the region. In that same period, Belize’s economic activity shrank -1 percent, so due diligence should be used when considering a market strategy. Population demographics remain strong, with a combined population approaching 47 million people, with a significant number of millennials making up the population.

In today’s highly charged political climate, free trade agreements often are viewed with skepticism, if not outright derision. The North American Free Trade Agreement (NAFTA), a tri-lateral trade agreement between the U.S., Canada and Mexico, has its share of critics. But on purely economic terms, NAFTA has widely been considered a success.

Other efforts to emulate the NAFTA example led us to two agreements that govern the U.S. trade relationship with the region. One is the Central American Free Trade Agreement

(CAFTA). This includes six of the seven countries in Central America, but not Panama. Panama has a separate agreement with the U.S known as Panama Trade Promotion Authority (PTPA). The U.S. had total exports of \$30 billion in 2016 to the CAFTA region, versus imports of less than \$20 billion. This trade surplus makes it unlikely that CAFTA will come under the same kind of scrutiny in the U.S. that NAFTA has.

Essentially, what both the CAFTA & PTPA agreements do is eliminate tariffs on certain goods manufactured in a participating country. In the case of automotive parts and accessories, this benefits the U.S. manufacturers, as there is little manufacturing of automotive items within Central America that gets imported back to the U.S. However, this does give American manufacturers a small advantage over their Asia-based competitors.

“CAFTA has provided us with a slightly better competitive advantage due to the reduced import duties,” says Mark Marutiak, international sales director at the Fram Group. “Of course, ...CONTINUE READING □



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8 International Trends

9 Technology: Logistics

12 Alan Segal

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Connecting with youngsters ENHANCES RECRUITMENT CHANCES

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

Filling staffing gaps remains an ongoing challenge throughout the aftermarket as so many valued employees reach retirement age amid a shortage of trained workers entering the industry. Seeking solutions to oft-heard laments along the lines of “today’s young people don’t want to get their hands dirty,” a growing array of forward-thinkers are reaching out to children while they are still in their formative years with the goal of inducing an early and hopefully long-lasting desire to pursue an automotive career.

In cooperation with California’s Antelope Valley Boys & Girls Club, Aaron Valencia is serving at-risk inner-city youngsters with his Los Angeles-based Lost Angels Children’s Project. Bearing the motto of “building futures by building cars,” the non-profit entity entails ambitious vintage-vehicle restorations and customizations conducted by elementary- to high-school-aged youths.

reinvested to perpetuate the program.

“We try to be a self-funding organization, but we also need help,” says Valencia, honored in September as a “CNN Hero” in a worldwide broadcast documen-

tary. “We have an influx of students, but not financial support. It’s a constant struggle to hit the pavement and keep this place going: We’re always looking for components, tools, welding materials, sandpaper, wires for electrical work” and other supplies.

Coker Tire, Vintage Air, Matrix System Automotive Finishes, Mar-K Manufacturing, AV Auto Paint, Edelbrock, LMC Truck and Jay Leno are among the current roster of sponsors, and Valencia points out that industry involvement in these types of boys and girls educational programs is crucial for furthering the prospects of the aftermarket to adequately staff their businesses with skilled employees.

“If there isn’t an infusion of interest these companies are going to go out of business,” he warns. “It goes hand-in-hand. It’s keeping it alive.”

“It’s a safe place to learn problem-solving,” Valencia tells Aftermarket Business World. “We haven’t had anyone in our classes who knew what they were doing when they arrived; that’s where we start.”

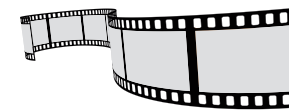
In addition to teaching attributes such as commitment, coping with life’s stresses, communication, teamwork and punctuality,...**CONTINUE READING** □

ASE GUIDES | QUESTION OF THE MONTH

Torque multiplication is performed in a vehicle’s:

- A. Engine
- B. Transmission
- C. Electronic control computer
- D. Brake pads

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Industry News

Products

4 Commitment to Training

7 Vendor Market Trends

9 Technology: Logistics

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Contact Us

5 Technology: Telematics

8 International Trends

12 Alan Segal

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TELEMATICS/CONNECTIVITY

The online aftermarket disruption

OEMs taking multi-faceted technology approach to gain share in the aftermarket

BY BRIAN ALBRIGHT
Correspondent

Automotive OEMs see the digitization of their businesses – everything from selling cars online to remote service and connected vehicle technology – as a key to future profitability. According to Frost & Sullivan’s recent report, “OEM Disruption in Automotive Retail and Aftersales,” vehicle manufacturers will combine connectivity, e-tailing, direct parts sales and service marketplaces in a strategy to improve their share of the aftermarket.

TRENDS & MARKET Analysis

This is also playing out on the front-end of car sales. “The links between the bricks and clicks are increasingly blurred,” says Dr. Julie Saini, global vice president for mobility aftersales and retail at Frost & Sullivan. “Customers want an omnichannel, anytime, anywhere shopping and service experience.”

According to Frost & Sullivan, the automotive industry invested nearly \$20 billion in digi-

Technology Newsmaker

Q&A

SHEILA ANDREWS
Director of Heavy Duty Programs
Auto Care Association



What do you expect will be some of the differences between the heavy duty standards and existing product data standards?



What did Andrews say? Continue reading online.

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tal transformation initiatives in 2015, including smart manufacturing, connected living/Internet of things technologies, security, big data analytics, digital retailing and mobility.

“The future of auto retailing is digital,” Saini says. “Digitization allows for the display of an unlimited product range in a relatively small



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Industry News

Market Trends & Analysis

Products

Contact Us

4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

12 Alan Segal

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showroom space. This is expected to continue as more omnichannel capabilities become the norm in the industry.”

Customers want the same type of experience with their auto dealer that they get with Netflix or Amazon.com. BMW, for example, is moving toward online car sales. Carwow in the UK, meanwhile, allows customers to configure their ideal vehicle and then get quotes from multiple dealers.

Hyundai dealer Rockar is another good example. The company sets up business in shopping malls with a few models on display and minimal staff. Customers can purchase a car online in just a few minutes. According to data from Frost & Sullivan, the company boasts a 96 percent customer satisfaction rate.

The future of parts, service

Digitization is also affecting parts and service. “Every aspect of the business is being changed in some way or another,” says Kumar Saha, director of aftersales mobility at Frost & Sullivan. “From order fulfillment and warehousing, to how tires are sold, or how services or parts are sold.”

Frost & Sullivan refers to this as “Aftersales 4.0,” and it includes e-com-

merce capabilities for parts, an all-makes/models repair strategy, predictive service, connected loyalty and social media programs, embedded telematics, over the air (OTA) firmware/software updates, branded aftermarket parts (like Ford Omnicraft), and express service at dealerships.

Dealerships are leveraging service marketplaces and telematics solutions to help extend their reach with customers and try to gain back some of the post-warranty market share that is held by the independent aftermarket.

“We are seeing that, for the first time, OEMs are moving downstream and getting closer to the customers when it comes to aftersales,” Saha says. “They are making direct contracts with online sellers and marketplaces. GM is selling parts directly to Amazon in the U.S., and other companies are looking at similar arrangements.”

Saha says to expect more remote service offerings, technician training via online resources, and more data from connected vehicles to play a big role.

E-tailing is top of mind. Frost & Sullivan puts automotive aftermarket e-tailing at \$21 billion currently, and that figure will grow to nearly \$50 billion by 2022. While

“OEMs are investing in a variety of approaches to expand their aftersales presence.”

the market is currently dominated by the U.S., Canada, France and Germany, by 2022 China will be the second largest market for online parts sales in the world.

OEMs will expand their own e-tailing presence when it comes to parts using a variety of strategies – setting up direct websites, using online marketplaces, or partnering with distributors. Strategies could vary by country; BMW uses marketplaces in the UK, and a direct e-store in Germany to sell parts. Fulfillment is handled through its dealership network.

Frost & Sullivan also expects to see the “Uberization” of vehicle service expand in the aftermarket. Services like WhoCanFixMyCar.com, Auto Butler, Openbay and others are creating service marketplaces where both dealerships and independent shops can provide quotes to customers looking for specific types of service.

“Going forward we’ll see parts and service bundling, increased dealer interest in flat-rate or fixed-price service and consolidation of service aggregator platforms,” says Saha.

OEMs are also looking for ways to mon-

etize the data being generated by vehicles, and are even investing in dongle technology for older vehicles in order to expand the number of connected vehicles.

“Dongles are a short-term solution for bringing older models into the connected car ecosystem,” Saha say. “OEMs want to acquire these unconnected cars, which is why Ford rolled out its SmartLink solution and Mercedes-Benz ...CONTINUE READING □

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VENDORS

4-H participation prepares youths for STEM-type aftermarket careers

BY JAMES E. GUYETTE
News Correspondent

Rapidly evolving from its traditionally agricultural roots, the 7 million young people in more than 50 countries who participate in 4-H – including more than 3.5 million girls and young women – are now likely to be just as attuned to Mark Zuckerberg as Arnold Ziffel.

TRENDS & MARKET Analysis

If you've ever wandered through the 4-H pavilions back behind the race track's second turn at the county fair, you've seen the attention to detail, dedication and creative innovation that 4-H'ers display in their projects.

For an aftermarket business, these youngsters are developing attributes that will make them desirable employees at your operation – especially if they are able to stay down on the farm, so-to-speak, rather than leaving town to seek jobs in the big city

upon reaching adulthood.

Sustaining the principles of “head, heart, hands and health,” 4-H traces its roots back to Ohio's Clark County, where Springfield Township Schools Superintendent Albert Belmont Graham established an after-school Youth Club in 1902.

Operated under the purview of the Cooperative Extension System, a partnership of the U.S. Department of Agriculture (USDA) and the National Institute of Food and Agriculture (NIFA), 4-H currently consists of more than 100 land-grant universities and 3,000 local offices across the nation.

At least 10 state governors and more than 50 members of Congress are 4-H alumni; former President Jimmy Carter and the late



JENNIFER SIRANGELO

Harold Arthur “Red” Poling, who served as chairman, president and CEO of the Ford Motor Co., also spent their formative years participating in 4-H's multitude of educational programs.

National 4-H Council President and CEO Jennifer Sirangelo is the first woman to lead the organization. In 2016, she launched the “Grow True Leaders” rebranding initiative to promote the diversity of 4-H programs and participants with the goal of boosting the membership to 10 million young people by 2025.

Presenting cutting-edge education involving science, technology, engineering and mathematics (STEM) skills is a concurrent point of emphasis aimed at preparing the membership for future careers in advanced fields such as manufacturing-plant robotics and other innovative developments applicable to the automotive industry.

Sirangelo recently responded to a series

“ Former President Jimmy Carter and the late “Red” Poling, chairman of Ford, were in 4-H. ”

of questions asked by Aftermarket Business World:

Q: 4-H is traditionally associated with agricultural activities; how did the STEM program become a 4-H endeavor?

A: 4-H was founded with youth ...CONTINUE READING □



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Industry News

Products

4 Commitment to Training

7 Vendor Market Trends

9 Technology: Logistics

Market Trends & Analysis

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5 Technology: Telematics

8 International Trends

12 Alan Segal

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VENDORS

U.S. Export-Import Bank dispenses aid to cash in on global sales

BY JAMES E. GUYETTE
News Correspondent

Despite several politically induced senior-level oversight vacancies, the Export-Import Bank of the United States (Ex-Im) is still open for business and eager to assist aftermarket executives seeking assistance for selling your products to overseas customers.

TRENDS & MARKET Analysis

The independent, self-sustaining quasi-governmental agency is beset by controversy as conservatives and liberals alike have denounced it as a bastion of “cronism” and “corporate welfare.” President Donald Trump’s slate of five nominees to fill empty Board of Directors seats has yet to receive confirmation hearings, and critics are questioning whether his choice to become chairman and president, former Republican Rep. Scott Garrett of New Jersey, is intent on implementing reforms or totally eliminating the program.

In the meantime, Ex-Im’s career-oriented management and staff are still reporting to work each day and operations are ongoing, according to spokeswoman Linda Formella.

“We’re certainly trying to reach out to more customers,” she says, declining to discuss the political brouhaha with *Aftermarket Business World* while asserting that Ex-Im’s current Congressional authorization remains valid until at least 2019.

Ex-Im “serves the people of the United States by helping American businesses grow through selling their products to other countries,” says Acting Chairman and President Charles J. Hall, a veteran of the nation’s diplomatic corps. “We are proud of our role as a mechanism for job creation and economic prosperity.”

Individual states are continuing to join the Regional Export Promotion Program (REPP) launched in 2016 with a roster of nearly 40 economic development organizations in more than 35 states and two U.S. territories.

“Since 2009, Ex-Im has demonstrated a historic commitment to small business exports, and our local partners were key contributors to that success,” says Formella. “Through REPP, the Bank will continue to grow our network of regional, state and local partnerships we need to ensure small businesses have additional tools and access to U.S. government resources for exporters.”

Benefits of the program for executives, especially owners of small businesses, include assistance with outreach

Ex-Im’s mission includes filling gaps in private export financing at no cost to American taxpayers.

Vendor Newsmaker

Q&A

CHARLES J. HALL
Acting Chairman and President
Export-Import Bank of the U.S.



What is the process for obtaining export insurance? Is Export Credit Insurance cost-prohibitive for small businesses?



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and counseling; introduction to marketing and training materials; and access to qualified finance experts, lenders, insurance brokers and other sources of support.

“I’ve seen first-hand how Ex-Im programs really help small businesses grow their international sales, create jobs and improve Alabama’s economy,” says Bill Cummins, executive director of the Alabama Small ...**CONTINUE READING** □

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 Products
 4 Commitment to Training
 7 Vendor Market Trends
 9 Technology: Logistics
 Market Trends & Analysis
 Contact Us
 5 Technology: Telematics
 8 International Trends
 12 Alan Segal

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LOGISTICS/CONNECTIVITY

International trade, e-commerce demands drive growing use of 3PLs

BY BRIAN ALBRIGHT
Correspondent

Armstrong & Associates projects that global spending on third-party logistics (3PL) will reach \$1.1 trillion in 2022, up from \$802 billion in 2016. The total cost of logistics in 2016 was \$8.2 trillion.

3PL revenues in the automotive space have grown from \$41 billion in 2010 to 52.5 billion in 2015, and should reach 54.9 billion by 2018. That represents a compound annual growth rate (CAGR) of 4.2 percent from 2010 to 2016. The growth from 2010 through 2018 averages slightly slower with a CAGR of 3.7 percent.

TRENDS & MARKET Analysis

According to Technavio's "Global Automotive Spare Parts Logistics Market 2016-2020" report, aftermarket parts may see higher logistics spending than the overall automotive market. Their forecast shows the global automotive spare parts logistics market will grow at a CAGR of 6.12 percent over the next several years.

Spare parts demand has spiked because of the aging vehicle fleets in Europe and North America. Technavio's report indicates that logistics providers need to scale up

and improve their stock planning and inventory management capabilities in China and other emerging markets as those country's vehicle fleets continue to age. In China, more than a quarter of vehicles were six years or older in 2012; by the end of last year, that figure was expected to have increased to more than 36 percent.

Technavio expects to see market consolidation among logistics providers in the space. "Competition is intensifying, and vendors are seeking an edge by adapting to the changing marketplace. The industry is becoming more competitive because of the disorganized nature of the market, which includes local truck and warehouse owners. The market is capital-intensive and requires advanced technologies," says Shakti Jakhar, logistics research analyst at Technavio.

China is the largest logistics market by country in the world at \$1.7 trillion according to Armstrong's "Global and Regional Infrastructure, Logistics Costs and Third-Party Logistics Market Trends and Analysis" report. The overall Asia Pacific region is also the largest logistics market, accounting for 39 percent of total logistics costs and 38 percent of total 3PL revenues.

Logistics costs as a share of GDP varies by region, with the United States having the lowest ratio at 8.2 percent



Technavio expects to see market consolidation among logistics providers in the space.

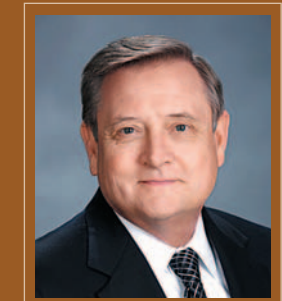


Technology Newsmaker

Q&A

MIKE FITZGERALD

Executive VP and GM, Innova



What features/functions are customers looking for in a fleet management solution and how has that changed recently?



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and Russia the highest at 16 percent.

Companies are using 3PLs more frequently because of the complexity of international trade and the demands of e-commerce. E-commerce customers in the Asia Pacific region spent \$22 billion with 3PLs in 2016, and will spend as much as \$40.2 billion in 2022. U.S. e-commerce ...CONTINUE READING ▢

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Industry News

Products

4 Commitment to Training

7 Vendor Market Trends

9 Technology: Logistics

Market Trends & Analysis

Contact Us

5 Technology: Telematics

8 International Trends

12 Alan Segal

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Achieving profitability through **CAREFUL PARTS CONTROL**

Next to payroll, parts is a major recurring expense for a repair center. Managing that expense is the key to keeping a shop profitable. The day you order the part versus when you use the part is a factor in profitability.

In addition, there are other factors that play into parts control. In many cases, it's not the part cost itself that is a deterrent to profitability but part return credits, repair credits and core charges that put a shop in the red.

Pre-ordering parts based on an insurer estimate for a vehicle scheduled for repair hampers profitability. Because the repair might not be completed before you pay for the part, you have incurred a dead expense.

Some shops I visit are complaining about parts storage concerns because they have

pre-ordered parts waiting for the vehicle. At one shop I visited recently the vehicle arrival dates written on the parts list were up to two weeks away. One of the parts lists showed the parts were ordered on the 28th and the vehicle was not expected until the 12th of the following month.

You cannot collect for a part before you complete the repair and can bill for the part through a completed invoice. The payment for these parts would be due on the 10th under normal billing practices. In most cases, you are going to require additional parts once the vehicle arrives, you disassemble the vehicle and create your repair plan.

It's a better practice to order all the parts needed for the repair at one time after the vehicle is at your shop. You will be waiting on parts either way so there is no reason to tie up your money for parts to sit in boxes. While this is contrary to some insurance company directives, showing them the statistics on your secondary parts orders usually brings some understanding.

I was at a shop recently and saw a bumper sitting by itself with a faded note on the invoice indicating the part should be returned. I asked the parts clerk how long the bumper had been there and she said a couple

“Part return credits, repair credits and core charges can put a repair shop in the red.”

of weeks. She added, “The box is a little ragged so the delivery driver would not take it.”

I asked if she had talked to the person she ordered the part from or the parts manager about returning the part. She said she had not and was hoping a repair would come in that needed the part. I pulled the invoice off the box, looked at the part price and the date it was ordered. I asked the parts clerk if she felt comfortable asking the shop owner for \$358.63. She quickly said “NO!” I said that's odd because you feel comfortable letting this bumper sit around for 20 days, essentially costing the owner \$358.63.

She admitted she had not looked at it that way. We went on to discuss how to talk to the selling parts department about the return, taking into consideration how much the shop spends with them and getting an agreement on parts returns.

As I was reviewing estimates at a customer's shop I saw
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JOHN SHOEMAKER
Business Development Manager
BASF North America

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Market Trends & Analysis

Products

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4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

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Congress takes next steps on **AUTONOMOUS CAR LEGISLATION**

The 115th U.S. Congress has struggled to move significant legislation in its first session. One of the few exceptions has been autonomous vehicle (AV) legislation.

The Obama Administration had struggled with clear guidelines for AV research and deployment, issuing only recommendations in September 2016. The National Highway Traffic Safety Administration (NHTSA) announced its most high-profile attempt for AV regulation, at that time, stating:

“This Policy is an important early step in that effort. We are issuing this Policy as agency guidance rather than in a rulemaking in order to speed the delivery of an initial regulatory framework and best practices to guide manufacturers and other entities in the safe design, development, testing, and deployment of HAVs. In the following pages, we divide the task of facilitating the safe introduction and deployment of HAVs into four sections:

- Vehicle Performance Guidance for Automated Vehicles
- Model State Policy
- NHTSA’s Current Regulatory Tools
- New Tools and Authorities.”

Important for this discussion is the “Model State Policy.” This was a nudge to states to allow the federal government to regulate AVs. NHTSA’s message to states was, “The Model State Policy confirms that States retain their traditional responsibilities for vehicle licensing and registration, traffic laws and enforcement, and motor vehicle insurance and liability regimes ... The shared objective is to ensure the establishment of a consistent national framework rather than a patchwork of incompatible laws.”

On the one-year anniversary of the AV guideline release, the Trump Administration issued their AV guidelines, Automated Driving Systems (ADS): A Vision for Safety 2.0.

This fall the U.S. House Energy and Commerce Committee opted to package multiple AV bills and attempt bipartisan legislation that would be the next step for AVs. The final bill, the SELF DRIVE Act (H.R. 3388), passed the Energy and Commerce Committee by a vote of 54-0. Committee Chairman Greg Walden (R-OR) commented after the bill mark-up, “I truly believe the bipartisan bill-drafting process for self-driving legislation is an example of our committee at its best – working together to pursue the common goal of

“The Model State Policy was a nudge to states to allow the federal government to regulate AVs.”

saving lives. Our aim was to develop a regulatory structure that allows for industry to safely innovate with significant government oversight – as safety must be the chief priority. And I believe today’s legislation strikes that critical balance.”

H.R. 3388 passed the floor of the House under a suspension of the rules allowing no amendments. Although the bill addressed numerous, important concerns like preemption, it failed to tackle the difficult issues of data access and, to a degree, cybersecurity as it relates to the vehicle aftermarket.

The U.S. Senate Commerce Committee followed with their version of the SELF DRIVE Act entitled the S. 1885, The American Vision for Safer Transportation through ...**CONTINUE READING** ▣



BOB REDDING
Washington, D.C. Representative
Automotive Service Association

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TO
ZOOM



DECEMBER
2017

Industry News

Products

4 Commitment to Training

7 Vendor Market Trends

9 Technology: Logistics

Market Trends & Analysis

Contact Us

5 Technology: Telematics

8 International Trends

12 Alan Segal

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Repair shop mixes unlikely items TO BUILD CUSTOMER LOYALTY

My college-age niece, Sydney, is one of the 80 million millennials who regularly use their smartphone for nearly everything – including the search and review process for auto maintenance and repair. At the same time, many Baby Boomers and Generation Xers still crave the human touch that goes hand in hand with a more personal experience.

One San Francisco-based leading Prius specialist, Luscious Garage Hybrid Auto Care, is successfully bridging the generational divide by combining a peaceful environment with leading-edge technology.

Four blocks south of restless Mission Street, I entered their sunlit service bay entrance, which resembles a meditative sanctuary instead of the stereotypical manly, iron-beam-and-concrete-barrier setup typically guarded by a growling service writer.

Gina, the shop manager, cheerfully escorted me around this open space, which could easily fit seven cars. Beneath clusters of vines, which freely dangled from the ceiling rafters, I enjoyed the soft music that filled the shop and studied the tubes of colorful wires and other electrical boxes neatly stored for future use. Recycling is valued in this purposeful world, and nothing is dumped on shelves randomly.

While in-shop safety for the customers is a priority – protecting clients from runaway electrical currents and keeping the immaculate floor clear at all times – I marveled how freely one car owner stood behind a tech, who was crouching into the cabin of her blue Prius. Meanwhile, another customer looked at the tools prepared to fix his car, including a red, rolling tray full of engine parts and a green collection bucket ready to capture the used motor oil.

None of the shop employees seemed anxious to shoo away the customers, who were clearly welcome to observe the work in progress. But just in case customers have enough of watching actual car repairs, everyone can enjoy full access to the in-house library, which contains a healthy sampling of intellectual literature.

Software technology reigns unobtrusively here at Luscious Garage. Customers may begin the service repair journey from the convenience of their mobile devices or on the oversized monitor on the kiosk, where Gina paused to explain to a customer what the diagnostic trouble codes meant. Quietly, she planned the maintenance treatment for his four-door Toyota, which was parked a few feet from them. Then, with a finger swipe authorized by the customer, the car was ready to be

Luscious Garage Hybrid Auto Care is bridging the gap through environment and technology.

serviced by one of the five techs, who are electronically assigned to complete the work orders at their designated stations. Tied into the mobile device or computer, customers can actively track the repair progression.

Employees benefit equally from the cloud-based software package created by Luscious Garage’s founder Carolyn Coquillet, which she named Shopware. Now sold on the market, Shopware enables businesses to connect with their customers. Unbound by paperwork, employees like Gina can update the customers of any modifications in the job in real time so that neither the tech nor the parts purchaser must wait long for approval.

Meanwhile, on a companion software system, the parts purchaser sees comparative parts and pricing to quickly source what’s available in the shortest lead time. John, who manages the inventory at Luscious Garage, told me that he is happy with the path to purchase and looks forward to the time
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ALAN R. SEGAL
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Best Business Practices

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Fleet
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Batteries



Industry News

Products

4 Commitment to Training

7 Vendor Market Trends

9 Technology: Logistics

Market Trends & Analysis

Contact Us

5 Technology: Telematics

8 International Trends

12 Alan Segal

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Extended vehicle: A telematics deal TOO GOOD TO BE TRUE?

In the Christmas classic, *It's a Wonderful Life*, there is a scene that appears to be set on Black Tuesday, at the onset of the Great Depression, where George Bailey who was just about to go on his honeymoon is overwhelmed with the demands of panicked depositors due to the closing of the bank. Seeing the panic at the Bailey's building and loan, Mr. Potter, the wealthiest man in town, offers to buy out Bailey's depositors at 50 cents on the dollar.

Bailey points out that, while this might bail out many of his depositors, it would ultimately put the building and loan, the only competitor to Potter's bank, under his control, thus reducing competition in the fictional town of Bedford Falls. I bring this story up not because the holidays are just around the corner, but because it is almost exactly analogous (absent Donna Reed) to the situation that the independent auto care industry is facing with access to embedded telematics systems.

As many readers are aware, the advent of telematics will provide the ability for vehicles to wirelessly transmit an enormous amount of data, including diagnostic and location information. While this could provide huge benefits to the auto care industry by enabling companies to more efficiently and effectively provide services to their

customers, there is one major problem: all the vehicle data is transmitted solely to the vehicle manufacturers.

Not only is this a missed opportunity for the auto care industry, but this monopoly on car owners' data could create a major impediment for technicians attempting to repair vehicles. In the not-too-distant future, cybersecurity concerns likely will cause car companies to limit the data available through the on-board diagnostic (OBD) port to only emissions related information.

Further, it is possible that some day the OBD port might disappear entirely, meaning that all the diagnostic data that technicians currently obtain through the OBD port will only be available through the telematics system.

Of course, the car companies have a solution to the aftermarket's concerns: they will make the data available from their servers. Known as the extended vehicle concept, independent shops will simply log into the car company server, pay a fee and obtain the codes they need to repair a vehicle. So, like Mr. Potter, the car companies have come forward with a solution aimed at bailing us out. However, before we celebrate, we might want to take a step back like George Bailey and think about the consequences.

Never before in the history of the aftermarket has

It is possible that some day the on-board diagnostic (OBD) port might disappear entirely.

the industry been dependent on the vehicle manufacturer to obtain the diagnostic information they need to repair a vehicle. While the Clean Air Act required that all vehicles be equipped with on-board diagnostic systems to monitor a vehicle's emissions related systems, Congress acted to ensure competition in the repair industry by mandating that the OBD port be standardized such that anybody could access the port without the need for a proprietary device.

Unfortunately, what is unfolding in the telematics area through the extended vehicle concept could threaten competition by forcing shops to obtain all their diagnostic data from the car company. Thus, the manufacturer would make the decision as to the cost and level of access to the data needed to diagnose and repair their vehicles.

Think about how the extended vehicle might impact the entire supply chain: Would
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AARON LOWE
Senior Vice President of
Regulatory and Government
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DECEMBER
2017

Industry News

Products

4 Commitment to Training

7 Vendor Market Trends

9 Technology: Logistics

Market Trends & Analysis

Contact Us

5 Technology: Telematics

8 International Trends

12 Alan Segal

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AV bill heads to Senate floor; WHITE HOUSE MIGHT BE NEXT

The autonomous vehicle bill the Senate Commerce Committee passed on October 4 differs somewhat from the bill the House passed in July, but not in any highly significant way. That means Congress has the opportunity to pass, and President Trump to sign, an AV bill before the year is out.

That will be challenging because the remaining days in 2017 available for congressional action are limited, and will be consumed by actions having to do with a tax reform bill. If the bill makes it passed the Senate, it must be combined with a previously passed House bill before it can be sent to the White House for President Trump's signature.

However, consumer advocates and state motor vehicle regulators have serious concerns about the Senate bill, which was modified in committee to meet some of those concerns. The most notable controversial issues that will come up on the Senate floor are the number of exemptions from Federal Motor Vehicle Safety Standards (FMVSS) available to autonomous vehicle testers and the pre-emption of local and state laws. Though the Senate bill passed the Commerce Committee with strong Republican and Democratic support, some Democrats may push for additional changes on the floor and can

delay and even sidetrack any legislation because of the Senate's parliamentary rules.

Various groups are picking at elements of the Senate bill. Beth Osborne, senior policy advisor for T4America, says, "The preemption language in this bill challenges their ability to regulate their own roads and, without requirements to share any data on their operations, creates a climate of secrecy around AV testing or deployment." Transportation for America (T4America) is a coalition of cities and business executives interested in advancing smart transportation.

Advocates for Highway and Auto Safety, a consumer group, released a comprehensive evaluation of the differences between the House and Senate bills, which are called the SELF DRIVE Act (H.R. 3388) and the American Vision for Safer Transportation through Advancement of Revolutionary Technologies (AV START) Act (S. 1885). The Advocates' evaluation says, "While there were many changes to both the House and Senate bills during drafting and mark-ups to include some basic safety protections for the public, both bills still have substantial problems."

But any push for changes to the Senate bill will probably elicit pushback from the Auto Alliance, which rep-

resents car manufacturers. "The START Act strikes the appropriate balance between state and federal responsibilities and in the process will help create new transportation options for the disabled, conserve energy and create jobs," the Alliance says.

The aftermarket's role in the deployment of level 3, 4 and 4 autonomous vehicles – called highly autonomous vehicles by both bills – has been more or less ignored, even though retrofitting is considered critical in terms of getting a critical mass of AVs on the roads. But there is one provision in the Senate bill that was lauded by the Motor & Equipment Manufacturers Association. That was the amendment to create a "Highly Automated Vehicle Data Access Advisory Committee" to make recommendations to

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STEPHEN BARLAS
Washington
Correspondent

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Fleet
Product
Study

Auxiliary
Lighting
Philips

Brakes
Raybestos

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DECEMBER
2017

Industry News

Market Trends & Analysis

Products

Contact Us

4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

12 Alan Segal

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How to beat commoditization IN THE AUTO AFTERMARKET

Rising demand for automotive parts and services is spurring new growth and revenue opportunities in the global aftermarket. With the overall market value expected to hit \$722.8 billion by 2020 (according to Global Industry Analysts), a wide range of businesses operating in the industry stand to benefit.

However, the sales environment is – as it has always been – tough, and competition for new customers is fierce. Larger parts and service providers are dominating the industry, undercutting their smaller rivals on price. These bigger businesses can also afford to produce a near exhaustive range of products, as well as invest significantly in go-to-market technologies.

As a result, commoditization is increasing and a price war has started. When consumers are unable to distinguish between two suppliers' parts and services, their decision largely comes down to cost. This makes it increasingly difficult for smaller players to compete. Complacency is not the solution, however; sales and marketing teams need to put their experience, skills and knowledge to good use and give their businesses a competitive push.

To overcome commoditization, brands need to become as non-generic as possible. An important

starting point is revisiting and revising the sales and marketing strategy. A thorough review of the four Ps – product, price, place and promotion – is fundamental to improving sales.

Product

A product must meet market demands. Instead of focusing on their competitors, smaller companies must research their customers and get to know exactly what they need. Only then can they assess rival products and spot any gaps or missed opportunities.

If, after this in-depth review process, a company realizes that its products and services are no better or worse than those of its competitors, it's time to think innovatively. One option may be to develop a whole new product line. That said, it's not always possible to design differentiated automotive parts because one is often very much like another.

In cases like this, companies can also consider including value-adds in their offers, such as a free or reduced-cost maintenance plan to ensure equipment stays in working order. Customers are attracted by affordable deals that offer superior personalization and convenience. And, if they like the service they receive, they'll usually come back again.



To overcome commoditization, brands need to become as non-generic as possible.



Price

In a price war, discounting becomes an all too common sales tactic. While it does boost sales in the short-term, discounting can damage a brand's reputation in the long-run. A brand synonymous with cheap deals will eventually become just that – cheap. Loyal customers will look elsewhere for quality and sales teams will rely on one-off transactions at low prices. Unable to offer their customers a real reason to stay, brands that rely too heavily on discounting will battle to build true relationships that stand the test of time.

To avoid the dangers of discounting, smaller companies need to make sure that a variety of business factors are used to achieve sustainable and effective pricing. This should never be left solely in the hands of top-level executives. Sales, marketing, business development and finance directors all have their own agendas and this will invariably

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KEVIN MCGIRL
President, sales-i

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DECEMBER
2017

Industry News

Market Trends & Analysis

Products

Contact Us

4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

12 Alan Segal

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REDUCING PARTS INVENTORY

Fleet managers carry less on-site inventory this year, study shows

BY BRUCE ADAMS | Managing Editor

Fleet managers are carrying less on-site inventory this year than last year, according to the 2017 *Aftermarket Business World* Fleet Product Study. Nearly 60 percent of respondents to this year's study said they order parts as needed, compared to 48 percent who said that in last year's study.

Among those fleet managers who said this year that they carry onsite inventory, 25 percent carry a one-month supply, 9 percent carry a three-month supply, 1 percent carry a six-month supply and 6 percent carry a one-year supply. These figures are all down slightly from last year.

Only 35 percent this year said that they were open to switching to a new supplier for the product categories surveyed this year. Those categories are auxiliary lighting, brakes and batteries.

Among those 35 percent, nearly two-thirds said this year that they prefer to be contacted via email by companies that want to do business with them. Some 21 percent preferred a phone call and 12 per-

cent wanted a personal visit.

Half of this year's respondents said that they prefer to buy from national parts retailers while 32 percent want to buy from warehouse distributors and 6 percent from dealerships.

The most important characteristics that fleet managers say they look for in their suppliers are product availability followed by price, fast delivery, customer service and being easy to work with. Other important qualities they mentioned include carrying specific brands, having a good working relationship and the return policy.

Some 27 percent of fleet managers said quality is the main reason they buy a particular product, followed by availability (16 percent), reliability (12 percent), brand name (12 percent), price (11 percent), warranty (10 percent) and performance (7 percent).

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. □

CONTENTS **16** Batteries **17** Auxiliary Lighting **18** Brakes

FLEET PRODUCT STUDY

Batteries

35% of fleet manager respondents say they are open to switching battery suppliers. Of those, 64% report email is the preferred method potential new suppliers should use to contact them.

53% of fleet managers use only one supplier for batteries.

49% of respondents order batteries as needed. 32% keep a one-month supply on-site.

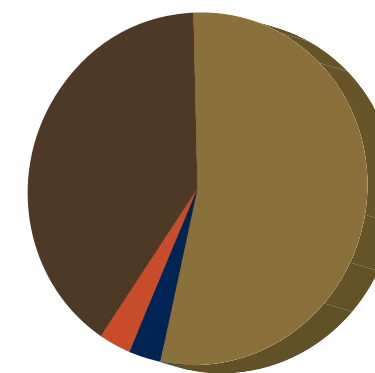
Frequency of battery service

Whenever needed	68%
Every six months	8%
Annually	11%

REDUCING PARTS INVENTORY

Preferred fleet supplier

National parts retailer	54%
Dealership	3%
Vehicle manufacturer	3%
Warehouse distributor	40%
Other	0%



Most important supplier qualities

Product availability	73%
Fast delivery	43%
Price	59%
Customer service	41%
Good relationship	35%

Most important battery qualities

Quality	22%
Reliability	11%
Price	19%
Availability	22%
Warranty	11%

92% of respondents order batteries 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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Brakes
Raybestos

Batteries



DECEMBER 2017

Industry News

Market Trends & Analysis

Products

Contact Us

4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

12 Alan Segal

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Auxiliary Lighting

40% of fleet manager respondents say they are open to switching auxiliary lighting suppliers. Of those, 63% report email is the preferred method potential new suppliers should use to contact them.

29% of fleet managers use one supplier for auxiliary lighting.

58% of respondents order auxiliary lighting inventory as needed. 26% keep a one-month supply onsite.

Frequency of auxiliary lighting service

Whenever needed	93%
Every month	2%
Every six months	2%

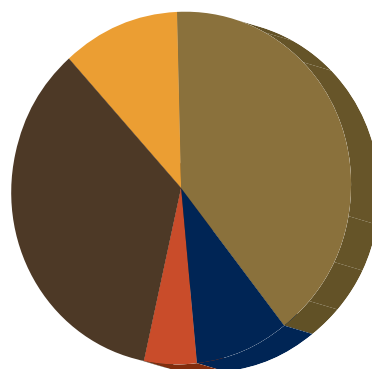
Some totals exceed 100 percent because respondents provided multiple answers. Others do not reach 100 percent because all answer options are not listed.

REDUCING PARTS INVENTORY



Preferred fleet suppliers

- National parts retailer 40%
- Dealership 9%
- Vehicle manufacturer 5%
- Warehouse distributor 35%
- Other 11%



Most important supplier qualities

Product availability	74%
Fast delivery	44%
Price	60%
Customer service	42%
Easy to work with	37%

Most important auxiliary lighting qualities

Quality	26%
Reliability	12%
Warranty	14%
Brand name	12%
Availability	14%

57% of respondents order auxiliary lighting online 0-10% of the time.

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Industry News

Market Trends & Analysis

Products

Contact Us

4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

12 Alan Segal

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Brakes

27% of fleet manager respondents say they are open to switching brake suppliers. Of those, 70% report email is the preferred method potential new suppliers should use to contact them.

30% of fleet managers use one supplier for brakes.

73% of respondents order brakes inventory as needed. 17% keep a one-month supply onsite.

Frequency of brake service

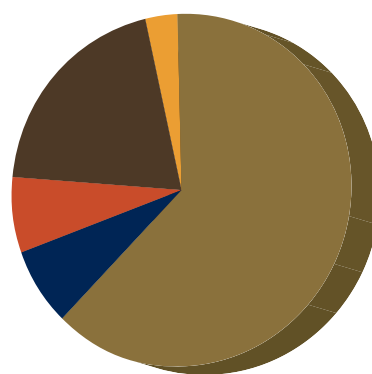
Whenever needed	77%
Every month	10%
Annually	7%

REDUCING PARTS INVENTORY



Preferred fleet suppliers

- National parts retailer 63%
- Dealership 7%
- Vehicle manufacturer 7%
- Warehouse distributor 20%
- Other 3%



Most important supplier qualities

Product availability	83%
Fast delivery	63%
Price	63%
Customer service	40%
Easy to work with	40%

Most important brake qualities

Quality	33%
Reliability	13%
Price	10%
Brand name	17%
Performance	13%

87% 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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DECEMBER 2017

Industry News

Market Trends & Analysis

Products

Contact Us

4 Commitment to Training

5 Technology: Telematics

7 Vendor Market Trends

8 International Trends

9 Technology: Logistics

12 Alan Segal

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