

PRESS RELEASE

THE AFTERMARKET IN ITALY: MARKET TRENDS ON THE EVE OF THE “BER” RENEWAL

May 13, 2010 – The growing complexity of motor vehicles and their evolution into ecologically efficient means of transportation (exemplified in the increase in the share of alternatively powered automobiles on the Italian market in 2009 -- 21.6% versus the 6.4% in 2008) makes necessary the creation of efficient assistance networks and as a result, the entry of specialised professionals in the aftermarket industry. Furthermore, it is imperative that the technological innovations applied to automobiles are accompanied by suitable training of after-sales personnel so that the end user is provided with skilled technical consulting and assistance.

Spurred by this trend, the aftermarket sector will be able to grasp the opportunity to promote the technologies and solutions that contribute to the reduction of emissions of CO₂ for vehicles now in circulation (window replacement, stop and start function, seats in light alloy).

This development will be accompanied by legislative changes already under way. On May 31, 2010, the Automotive Block Exemption Regulation 1400/2002 (BER) is scheduled to expire. Based on the draft of the new document made public by the European Commission last December, which will provide legislative framework of the future competition in the automotive sector, the BER will be divided in two parts: one concerning the sale of autos, its current version being extended to 2013; and the other dealing with after-sales service, for which a “mini-regulation” is to be promulgated with special emphasis on free access to technical information, use of the warranty, definition of the sub-supply and the double marking on the product.

There will be ample room for debate on these and other issues of relevance to the replacement tyre segment at the 2011 edition of Autopromotec, the most specialised international biennial exhibition of automotive equipment and the aftermarket (promoted by ANFIA Components Group as part of a cooperation agreement with Promotec) to be held in Bologna May 25-29, 2011.

The total value of the Italian spare parts¹ market (according to auto manufacturers price lists) is 12.5 billion euros, of which 7 billion euros accounts for mechanical and electronic parts and the remaining 5.5 billion for auto body parts. On the supply side, the spare parts activity of the automakers totals about 40% of the sector on a national level, while the share of supplier of OE components is 45% and the remaining 15% is made up of producers of adaptable spare parts².

¹ Excluding tyres, lubricants, paints, accessories, garage equipment

² In the auto body sector, the share claimed by automakers is generally higher than average

The results of the international economic crisis in the automotive segment have obviously had their effects on the aftermarket. Nevertheless, for companies in the sector, the reduction in turnover was lower compared to that recorded by producers of OE components. In fact, during recessions the limited expenditures of consumers cause them to delay the purchase of a new automobile, which then leads to an increase in vehicle maintenance and repair.

“According to the data of the Aftermarket Barometer, statistical survey of the ANFIA Components Group which monitors the market trend on a monthly base on a consolidated level and as regard to the individual product families, the aftermarket concluded 2009 with a decrease of 5.4% compared to the previous year,” stated Riccardo Buttafarro, Coordinator of the Aftermarket Work Group of the ANFIA Components Group. “This is the result of reductions of varying extent in the individual product families. The only double-digit contraction is that of the undercar components (–10.4%), followed by a –7.7% in auto body and passenger compartment components. A more limited decrease was noted for engine components (–4.1%), followed by a reduction of 3.9% for expendables and 3.8%, the smallest decrease, for electric and electronic components. In the first two months of 2010 the data show an increase of 8% with respect to January-February 2009 – those two months being the hardest hit by the economic crisis. The recovery, in any case, will be gradual and for 2010 the forecasts call for a 1% growth over the previous year.”

“Given the economic importance of the aftermarket industry,” commented Renzo Servadei, Managing Director of Autopromotec, “we should keep in mind that with the current emphasis on sustainable mobility, the importance of proper vehicle maintenance to keep autos efficient can’t be emphasised enough. That also goes for the functioning of devices installed by the manufacturer to reduce environmental impact and make vehicles safer.”

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ANFIA-Italian Association of the Automotive Industry

With over 280 member companies reporting revenues of nearly 60 billion euros and employing 130,000 workers, ANFIA is one of the major trade associations within CONFINDUSTRIA (The Confederation of Italian Industry).

ANFIA’s objective is to represent the interests of member companies in interfacing with public and private, national and international entities. It dedicates itself to the study and resolution of technical challenges, as well as economic, fiscal, legislative, statistical and quality-related issues in the automotive segment.

The association is organised into 9 product groups, each coordinated by a President and managed by an Executive Committee: *Buses, Motor Vehicles, Sports and Special Cars, Car Coachbuilders, Commercial Vehicle Coachbuilders, Components, Tyres, Motor Caravan Manufacturers, Trailers.*

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AUTOPROMOTEC

Autopromotec, the international biennial exhibition of automotive equipment and the aftermarket products, is the most specialised exhibition in the world for the assistance to the automotive industry and is a benchmark of the international automotive aftermarket: it will take place in Bologna (Trade Fair Centre) from 25-29 May 2011.

The show, at its 24th biennial edition, will host garage equipment and all sectors of the automotive aftermarket industry and the innovations for the sustainable mobility.

Autopromotec is the most important meeting-point for manufacturers and international buyers.

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