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INTERNATIONAL

NEWS

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Marketing Days

LINKÖPING

ADI on all fronts



“

We are well positioned to pursue our development, seize every opportunity and look forward to 2024 with confidence. ”



INTERNATIONAL

This magazine is distributed to all business relations and distributor members of the ADI group.

We are delighted to present you with this new newsletter, which reflects the dynamism of the ADI and its members.

Exceptional Marketing Days organised in Sweden with our colleagues from AD Sweden enabled us to combine professionalism, conviviality and a passion for cars with our partner suppliers.

Carat refined its employer brand and launched a massive recruitment campaign via social media and specialised online sites. This theme of the attractiveness of our professions and the search for new talent concerns our entire profession, and the ADI and its members have launched several initiatives in this area. Our supplier partners are also involved in videos broadcast on YouTube.

AD Auto Total, which is expanding rapidly, successfully organised its Business Show, which attracted 44,000 visitors, and is gradually integrating its new 36,000 m² Romenergo central warehouse in Bucharest.

As a member for Belgium and the Netherlands, Doyen organised its biggest customer conference ever (over 1,500 people) in Sardinia.

Finally, at an exceptional ceremony, Josep Bosch, our Honorary Chairman, was honoured for his entire career in the after-sales sector by AUTOPOS magazine.

Beyond these highlights, the ADI continues to support the work of the FIGIEFA team in defending independent repair and distribution: the adoption of a Data Act and the prospect of a specific adaptation to the automotive sector are a victory for our profession.

We should also note the very favourable ruling obtained in the European Court of Justice by our colleagues from Carglass Germany and ATU concerning access to the FCA group's vehicle data. You can read more about this victory in this issue.

Last but not least, although 2023 is not yet over, we are experiencing a year of growth: ADI members are performing well, many of them gaining market share. With the prospect of ageing car fleets across Europe, we are well positioned to pursue our development, seize every opportunity and look forward to 2024 with confidence.

With a little advance notice, I wish you all a very happy festive season... and... happy reading!

■ Stéphane Antiglio

ADI PRESIDENT

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ADI Marketing Days

LINKÖPING



On 22nd and 23rd of September, AD International successfully hosted its annual ADI Marketing Days in Linköping, Sweden. This event attracted nearly 100 marketing professionals, representing both AD partners and industry experts.

On Friday, the audience was invited in the grant VIP tent with view on the start grid of the track for the unveiling of the marketing plan.



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04

1. **Adam Källberg**, CEO of AD Sverige was extremely delighted to welcome all ADI partners and parts manufacturers in his country.
2. **Jenk Oz**, CEO of Thred Media, shared insights on the Generation Z
3. **Antti Valtavaara**, CEO of AD Finland, presented the on-line Garage Management System “MyCar”
4. **Charlie Ekenheim**, Technical Trainer at AD Sverige, who previously operated his own workshop, provided valuable insights to the participants, detailing the challenges he encountered when seeking access to technical expertise.



The marketing plan focused on three key pillars:

1. **People:** Addressing the challenge of finding individuals with the right skills to work in the aftermarket industry at all levels. ADI has partnered with renowned parts manufacturers such as Bosch, Valeo, Gates, and more (with additional collaborations soon to be announced). Together, they are launching a series of social media videos aimed at persuading young talent to consider a career in the aftermarket sector. These videos raise issues that resonate with young people, such as the technical aspects of workshop jobs, sustainability, and more. As a highlight, the event featured a keynote speech by Jenk Oz, an 18-year-old entrepreneur, founder, and CEO of Thred Media, who shared insights into the mindset of Generation Z and strategies to attract them.

2. New Technologies:

In the second pillar of the marketing plan, the focus was on the Eure!Car program, which offers a.o. technical support to independent workshops through live and online training sessions. New features added to the Eure!Car program were presented.



3. Media Plan:

The presentation also detailed ADI's media plan for the year 2024, offering a comprehensive overview of the events, tools, and brochures set to be developed throughout the year.



This setting was the Mantorp Park racing circuit, coinciding with the Grand Finale of the Porsche Carrera Cup. The choice of venue was particularly relevant because ADI's Swedish partner, AD Sverige, sponsors two race cars for Team Micke Kågered Racing. These cars, in conjunction with the racing team, are being used to visit technical schools, actively promoting career opportunities at AD and within workshops. This effort seamlessly aligns with the "People" pillar of ADI's strategy.





Micke Kågered



The results of the Grand Finale of the Porsche Carrera Cup Scandinavia:

- Porsche Carrera Cup Scandinavia: Lucas Sundahl from the Micke Kågered Racing team secured an impressive 2nd place with 260 points, just behind Ola Nilsson with 263 points.
- In the Pro-AM category, Mikael Karlsson from the Micke Kågered Racing team took the 1st place with 268 points.
- The Porsche Carrera Cup Team 2023 title was claimed by Micke Kågered « AD » Racing Team, securing 1st place with 523 points.

A remarkable achievement, with two out of three top positions for Micke Kågered AD Racing. Congratulations to the entire team!



Court case ECJ ruling

A MILESTONE FOR FAIR COMPETITION IN THE AUTOMOTIVE AFTERMARKET



From its headquarters in Brussels, the European federation of the automotive aftermarket distributors, Figiefa, monitors and accompanies the development of European and International legislation affecting the automotive aftermarket. Figiefa represents the interests of its members towards European and international institutions.

In a series of articles in this newsletter, Figiefa and ADI, who is assisting Figiefa in various dedicated working groups, intend to give you an executive overview of key topics that are bound to affect tomorrow's IAM playing field.

 In this edition

Court Case ECJ Ruling
A MILESTONE FOR
FAIR COMPETITION
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Brussels, 20th October 2023. FIGIEFA welcomes the recent European Court of Justice's ruling in the case of CarGlass/ATU vs. Fiat Chrysler Automobiles (FCA) as a significant leap towards fostering fair competition in the automotive aftermarket industry, ultimately benefiting European consumers.

The ECJ ruled that **vehicle manufacturers may not impose any conditions on independent operators which are not specified in the type approval regulation**. CarGlass/ ATU had complained about FCA equipping vehicles with so-called "secure gateways".

These "secure gateways" are characterised by the requirements on independent and authorised repairers to

1. register beforehand with FCA,
2. log in using personal connection data on a portal designated by FCA,
3. purchase a paid subscription for use of multi-make diagnostic tools and
4. connect them to that server, in order to perform write operations, erase error codes, perform recalibrations and activate vehicle parts.

The ECJ judged these requirements to be illegal, as they are not identified as valid conditions of access in the EU 2018/ 858 Regulation and would thus restrict independent operators' legal right and ability to perform repairs. As vehicles integrate more and more sophisticated features, such as ADAS, the ability to activate and calibrate such systems are essential and independent repairers' rights to do so must be protected.

This momentous decision echoes FIGIEFA's unwavering commitment to establishing a level-playing field and ensuring equitable access to diagnostic, repair and maintenance information (RMI) and vehicle data. These principles are fundamental in upholding the competitiveness of aftermarket services catering to the 280 million vehicles owned by consumers and businesses across Europe.



This judgment is resolute:

vehicle manufacturers are bound by the limitations specifically foreseen in the Type Approval Regulation 2018/858 concerning access to OBD and repair and maintenance information. **Independent operators must be granted access to the “full diagnostic data stream” via the OBD port**, encompassing data reading and writing during standstill, and data reading when the vehicle is in motion.

Another key aspect of the ECJ judgement is the recognition that compliance with UNECE Regulation R155 on Cybersecurity (now cross-referenced in the EU General Safety Regulation 2019/2144)

does not absolve vehicle manufacturers of their RMI obligations under the Type Approval legislation. The Court ruled that **imposing a secure gateway with conditions that obstruct legitimate operators' access rights is prohibited**.

FIGIEFA has consistently advocated for cybersecurity in vehicles, supporting practical and proportionate protective measures. The creation of SERMI stands as a testament to constructive engagement by FIGIEFA and befriended independent aftermarket operators, together with vehicle manufacturers, to address critical security concerns related to access to security (anti-theft)-related RMI.

The ECJ ruling addresses a crucial facet of fair competition in the automotive aftermarket. FIGIEFA therefore urges the Commission to finalise the legal framework and expedite its proposal on the sectorspecific data legislation, which should include specific requirements to maintain accessibility to OBD port data and functions. This proposal should strike a balance, allowing manufacturers to safeguard securitycritical vehicle functions while ensuring effective access for legitimate operators.

It is important to note that the ECJ case exclusively pertains to repair and maintenance use cases. Sectorspecific legislation must extend this scope to foster innovation and service development across the broader mobility and automotive services landscape. Embracing the opportunities presented by the digital and green transition mandates that all market participants have fair and secure access to in-vehicle data, functions, and resources under the proposed legislation.



Doyen unites networks

TO SHAPE THE FUTURE OF THE INDEPENDENT AFTERMARKET



Doyen Auto recently convened its networks and partners in the picturesque Sardinia for its highly anticipated International Convention. This event marked a pivotal moment as it brought together all the group's stakeholders, unveiling their strategic plan, "Move Up 2027," which serves as a concrete response to the evolving landscape of the automotive aftermarket. Attendees also had the unique opportunity to explore an exclusive trade show, featuring industry-leading equipment manufacturers who were mobilised to anchor the partnership for years to come.

for the first time. Over 1,500 individuals from 4 countries be congregated in Sardinia, forging a collective vision for the future. The convention was dedicated to tackling forthcoming challenges in the automotive repair sector, navigating a path through technological innovations, environmental responsibilities, and an era marked by increasingly connected vehicles and users.

Showcasing Group Attractiveness through an Exclusive Trade Fair

A standout feature of the convention was the Doyen Expo trade fair, where 55 exhibitors demonstrated their unwavering commitment to Doyen and their confidence in the group's allure.



A Gathering of 1,500 Participants from Four Countries

From September 28th to October 1st, 2023, Doyen Auto hosted its groundbreaking "Sardinia 2023" International Convention. This landmark event saw all of its networks, spanning both distribution and repair sectors, converging



« Move Up 2027 »

At the heart of this event, Doyen Auto unveiled its ambitious “Move Up 2027” strategic plan, raising expertise today to succeed tomorrow. This resolutely optimistic, multidimensional strategy based on action puts the emphasis on repairers. The plan equips them with the tools necessary to establish and sustain profitable, competitive, and enduring businesses in an ever-changing landscape.



Under “Move Up 2027”, repairers are about to become:

1. **Experts in New Technologies:** They will be capable of performing all operations on all types of vehicles, thanks to an expanded training portfolio and the growth of the Requal catalogue, Doyen’s private brand.
2. **Experts in Communication:** Repairers will sharpen their skills in customer acquisition and retention, emphasizing effective communication strategies.
3. **Experts in Management:** Repair shop owners will evolve into business leaders who enhance profitability through data analysis, diversification, recruitment, and active participation in the transition toward sustainable mobility.

Environmental Responsibility

Doyen took environmental responsibility to heart during the International Convention. By uniting professionals from four European countries in Sardinia, the company recognized its carbon footprint and committed to offsetting it. In a remarkable gesture, Doyen committed to plant 77,543 trees in France and BeNeLux, contributing to carbon sequestration efforts in forests.



Patrice Astor, Managing Director of Doyen Auto, summed up the event by stating, “The Sardinia 2023 International Convention was exceptional, bringing together our networks of repairers, distributors, and partners. Together, we share a vision of affordable and sustainable mobility, embodied in our 2027 strategic plan. We believe that repairers are the drivers of change, and by helping them turn challenges into opportunities, we move forward collectively. In this way, we have mapped out a desirable future for the independent aftermarket.”

500 Career opportunities

CARAT IS LOOKING FOR TALENT THROUGHOUT GERMANY



The demand for qualified professionals in the automotive and commercial vehicle parts trade continues unabated, and CARAT, ADI's German Partner therefore spent two months doing everything it could to attract talented employees to the industry. The recruitment marketing campaign extended across various social media platforms and renowned job boards in August/September 2023 to ensure a wide reach.

CARAT and its affiliated parts wholesalers. From wholesale salespeople to logistics experts and apprentices, a wide range of career opportunities for professionals at various levels were advertised. The application process itself was as simple as online shopping - with no cover letter and just a few clicks. Interested parties were given the chance to get their dream job in seconds.



Kuci expresses her conviction: "We are confident that we will continue to take successful measures to counter the shortage of skilled workers in the future - and for the benefit of our entire CARAT Group."

The shortage of skilled workers is currently one of the biggest challenges that companies are facing. The automotive industry is not spared from this either. To counteract this, the Mannheim-based ADI partner launched a Germany-wide personnel marketing campaign in August. This campaign aimed to attract top talent to the group and its affiliated parts wholesalers and offered applicants the opportunity to choose their preferred location from 500 vacancies across Germany.

Afterwards, Iliriana Kuci, CARAT's HR Manager, commented on the success of this initiative: "With a total of 800 applications and the successful filling of several vacancies, we can look back on an extremely successful campaign."

The recruitment marketing campaign highlighted the variety of positions that were, and in some cases still are, available at

**FOLLOW
US!**

AD International has initiated an employer branding campaign in partnership with some of its key suppliers. The initial videos, featuring Bosch and Valeo, can be found on AD International's YouTube Channel. Stay tuned for more exciting updates!



TCMATIC



NEW ADI AGREEMENT

The company TCMATIC receives the homologation by Autodistribution International. "We have been working for years with several partners of AD International and the relationship has always been very good, but it is a big step for the company to have passed the homologation process. We are very grateful," explained Monica Fuentes, TCMATIC's sales director. As experts in the field of their products, they are also industrial partners of Eure!Car.

WHO IS TCMATIC

TCMATIC is an industrial company expert in the integral service of repair, remanufacturing and maintenance of automatic transmissions with a strong business base, which has decided to bet on distribution as a sales channel and currently enjoys an excellent position in their national market in Spain. TCMATIC has not stopped growing due to the democratization of the automatic gearbox in Europe. The Spanish company has structured its business in three product lines. On the one hand, gearbox maintenance, on the other, everything related to the rebuilt product, and lastly, the dismantling business, with all the spare parts themselves. But the company does not limit itself to the sale of its products; it also offers a complete range of services, from technical assistance to professional training.

MAINTENANCE LINE

TCMATIC has a complete range of its own products that guarantee the maintenance of the automatic transmission in the best conditions.

- **TCMATIC SERVICE KIT** that includes everything necessary to service automatic transmissions.
- Wide range of **APPROVED** and specific **ATFs** for each type of gearbox.
- **ATF change machines (Automatic cleaner exchanger)**. One of them is the already known ACE18 and its latest release is the ACE23.01, an unprecedented machine in the market that represents an important change in aspects of: design, software, data and usability (UX/UI).



This machine has been awarded the German Design Award 2023 for "Excellent Product Design - Industry" which rewards among other things: ergonomics, degree of innovation, product aesthetics, technical quality and manufacturing techniques and quality.

REMANUFACTURED PRODUCTS

In this line TCMATIC commercializes: automatic gearboxes, valve bodies and mechatronics, torque converters... and this year they have become the official distributor of Borg Warner in Spain, France and Portugal with their double clutches and all-wheel drive couplings.

tcmatic

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AD Auto Total's 2023 journey

ROBUST GROWTH AND PARTNERING FOR SUCCESS



and power. Beyond the excitement (jaw-dropping stunts, heart-stopping drifts and incredible skills of world champions), ATBS highlighted groundbreaking advancements in the auto repair industry presented by +120 exhibitors, offering thought-provoking conversations, practical workshops, and presentations that painted a vivid picture of the rapidly evolving future. Our strong relationships with +800 currently active suppliers allowed us to offer the best in automotive products worldwide within this event.

Spotlight on community, innovation, and professionalism.

In 2023, we continued our tradition of fostering the automotive community, creating genuine connections, and celebrating our industry's innovation and expertise. The highlight of our year was the **Auto Total Business Show (ATBS)** held in June in Bucharest, which attracted +44.000 car enthusiasts and industry professionals, showcasing a thrilling spectacle of speed, precision,



Maximizing efficiency for us and our clients.

We invent ways to bring people closer to what they want. Colleagues, clients, partners, for them and for us we were and will remain pioneers. This is the story behind our **Romenergo logistic centre**: from an old abandoned communist building, we are shaping the biggest spare parts logistic centre in Romania, in the southern part of Bucharest. Romenergo has 36.000 sqm. and 4 floors, 39 sectional doors with dock ramps and 9 drive-in doors. At this moment, the project is still in commissioning phase with the **Go Live** milestone in the summer of 2024. Although we have not met our initial milestone (launch in 2023), we actively work together with our service provider to mitigate the impact of all the latest challenges and explore solutions to keep the project on track: the pandemic had a significant impact on various industries, affecting supply chains, workforce availability, and overall business operations. Additionally, the conflict in Ukraine has added another layer of complexity to our external environment.



Looking back, we believe within every challenge and major change lie significant opportunities. There are, though, some things that won't change soon: the most solid brick we have laid in the foundation of this group almost 30 years ago is that we all do something we like, surrounded by GOOD people. It is at the origin of all things, it is the essence which continues to be the genesis of our everyday endeavor, and it beautifully defined our 2023 journey so far.

AD Auto Total Romania continues to lead nationally as a trusted business partner. Our car parts and accessories get to our +17.000 clients fast and securely – we have a top distribution system, with the densest and most agile distribution network

in Romania: own fleet with full control (+1000 vehicles who run +137.000 km daily), 89 locations, 2 central warehouses in Romania, 2 in Hungary and 1 in Moldova, an exceptional team of +1800 employees and +17.000 clients.

Josep Bosch,

A BENCHMARK IN THE AUTOMOTIVE AFTERMARKET



Josep Bosch Sayols, president of AD Parts and honorary president of AD International, is a benchmark in the aftermarket in Spain and Portugal. His professional career has been marked by success and innovation, and his contribution to the sector has been recognized with awards such as the Trócola de Honor 2023, recently awarded by the industry magazine Autopos.

Born in Girona, to peasant parents from Vall de Llèmena, in 1937, he studied until he was 13 years old and was trained in commerce and accounting during his youth and other courses in management and business administration in '72. He began his professional career in the automotive sector in 1974, when he founded his own spare parts distribution company AD Bosch. In 1982, he piloted the formation of a purchasing group, GEDASA, the core of today's AD Parts, the name given to the company after its entry into AD International. Today, AD Parts has 27 partners in Spain and Portugal.

Under the leadership of Josep Bosch, AD Parts has become a leading company in the independent automotive parts distribution sector. The company is committed to innovation and quality, and has developed a wide range of products and services to meet the needs of repair shops. In 2000, the Grup Eina Technical Center was created, which works exclusively for AD and ADI partners, and is used to develop the well-known Millennium Program.

This brings together different services to facilitate the day-to-day work of the workshop, as well as accompanying it in its training and specialization in the most current challenges of the sector.

"The future of the aftermarket is collaboration," he said. "Repair shops have to work together to offer the best service to customers."



The recognition with the Trocola of Honor is a well-deserved tribute to a life dedicated to the automotive aftermarket sector. Josep Bosch's professional career has been marked by success and innovation, and his contribution to the sector has been decisive.

In the projection shown at the Trócola Awards gala, Josep thanked for the recognition and stressed the importance of collaboration between repair shops to face the challenges of the future.