NAPA Outlook®

VOL. 18 NO. 3

EXCELLENT

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AVERAGE

BELOW AVERAGE

POOR



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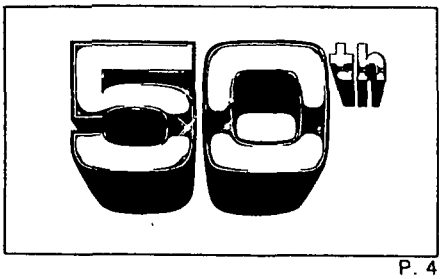
NAPA Outlook

VOL. 18 NO. 3



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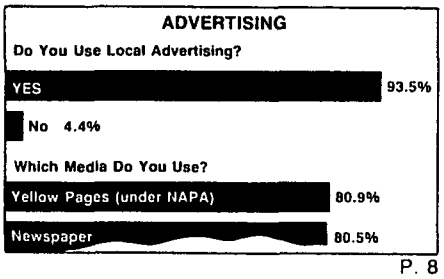

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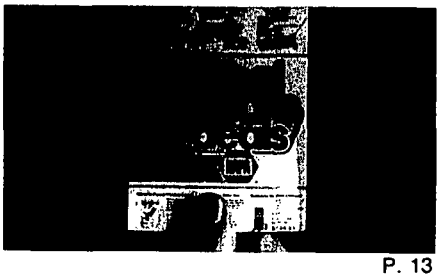

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NAPA OUTLOOK VOL. 18 NO. 3

Kathy Randall, Editor & Director of Communications

Tim Kelley, Assistant Editor & Communications Coordinator

Published periodically in the interest of NAPA Jobbers, Distribution Centers and Manufacturers across the nation. When notifying us on a change of address, please mention NAPA *OUTLOOK* and give us the old address along with the new address and zip code.

Litho in U.S.A.

NAPA HEADQUARTERS
2999 Circle 75 Parkway, Atlanta, Georgia 30339


Blue Max quality
is now available in a car wash!
Introducing new Blue Max Liquid Car Wash, a concentrated detergent powerful enough to cut through the most grimy dirt, and lift it off without harming your car's shiny, wax finish.
One 16-ounce bottle of Blue Max Liquid Car Wash will last 32 complete washes. It's rich, sudsy foam deep cleans and leaves a glistening shine. No water spots! And all it takes is just one-half cupful in a bucket of water!
3216
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Blue Max
Liquid Car Wash
32 Washes!
CAUTION:
Get more Blue Max quality for your money!
NAPA
Mac's
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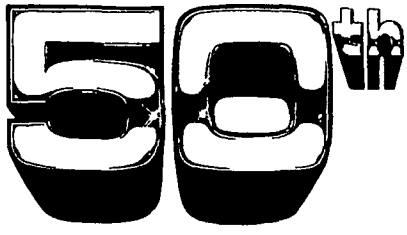
Ashland, Kentucky 41101

ALE PROGRAM $UCCE$$E$

FIFTIETH ANNIVERSARY CELEBRATION TURNS INTO SALES BONANZA



Nate's Auto Parts in Ogdensburg, New York has come up with a sure-fire way to attract dealer and D-I-Y customers.

As part of its 50th Anniversary celebration, Nate's (serviced by the Syracuse D.C.) held a dealer appreciation night. Closing its doors to all but those special invited dealers, Nate's used the occasion to show its gratitude to its many loyal traditional customers. NAPA manufacturer representatives were in attendance to display and explain their various products. As a special treat, Nate's provided refreshments throughout the evening.

Nate's also held a special sale for the attending dealers. The evening was a huge success with over 500 guests present.

But that was only the beginning of Nate's anniversary celebration. The weekend after dealer appreciation night Nate's held a customer appreciation sale for its D-I-Y-ers. The store was decked out with banners and a local radio station was on hand to do a remote broadcast. A SNARK sailboat was given away as a grand prize. As a result of these special promotions, Nate's sales figures increased by the hour.

Nate's is a recognized part of the Ogdensburg community and owner Larry Sarkin says it's partially due to the many events he sponsors. Planning for the 50th anniversary celebration began back in November but just one look at the resulting sales figures is enough to convince Larry Sarkin that it was worth the effort.

TREATING DEALERS RIGHT INCREASES SALES

The NAPA Auto Supply store in Champaign, Illinois (serviced by the Chicago D.C.) is another store which has discovered how effectively manufacturer representatives can increase sales.

During their yearly dealer appreciation night NAPA Auto Supply invites representatives to display their products and be on hand to answer dealer questions.

"At this year's appreciation night approximately 140 attended," said store manager Chris McCowan. "And while we try to down-play sales on this night, during the next month we see some of the store's highest sales for the year."

The store provides dinner, door prizes and gifts for the attending dealers and uses the opportunity to promote some of NAPA's programs through displays and slide shows. It's an excellent way for the store to say thank you to its traditional customers and to reaffirm the jobber/dealer relationship.

> ***"...during the next month we see some of the store's highest sales for the year."***

This is the second year NAPA Auto Supply has held its dealer appreciation night and McCowan believes it will become an annual occasion. "It has gone so well," said McCowan, "that we have had a number of jobbers in our area call and ask us how we did it."

That's a real success story!

HOLDING CLINICS MADE SIMPLE

Looking for an easy and simple way to hold dealer clinics? Bill Cropper, owner of Salisbury Automotive in Salisbury, Maryland (serviced by the Delaware D.C.), has come up with one way to make holding clinics simple and smoother.

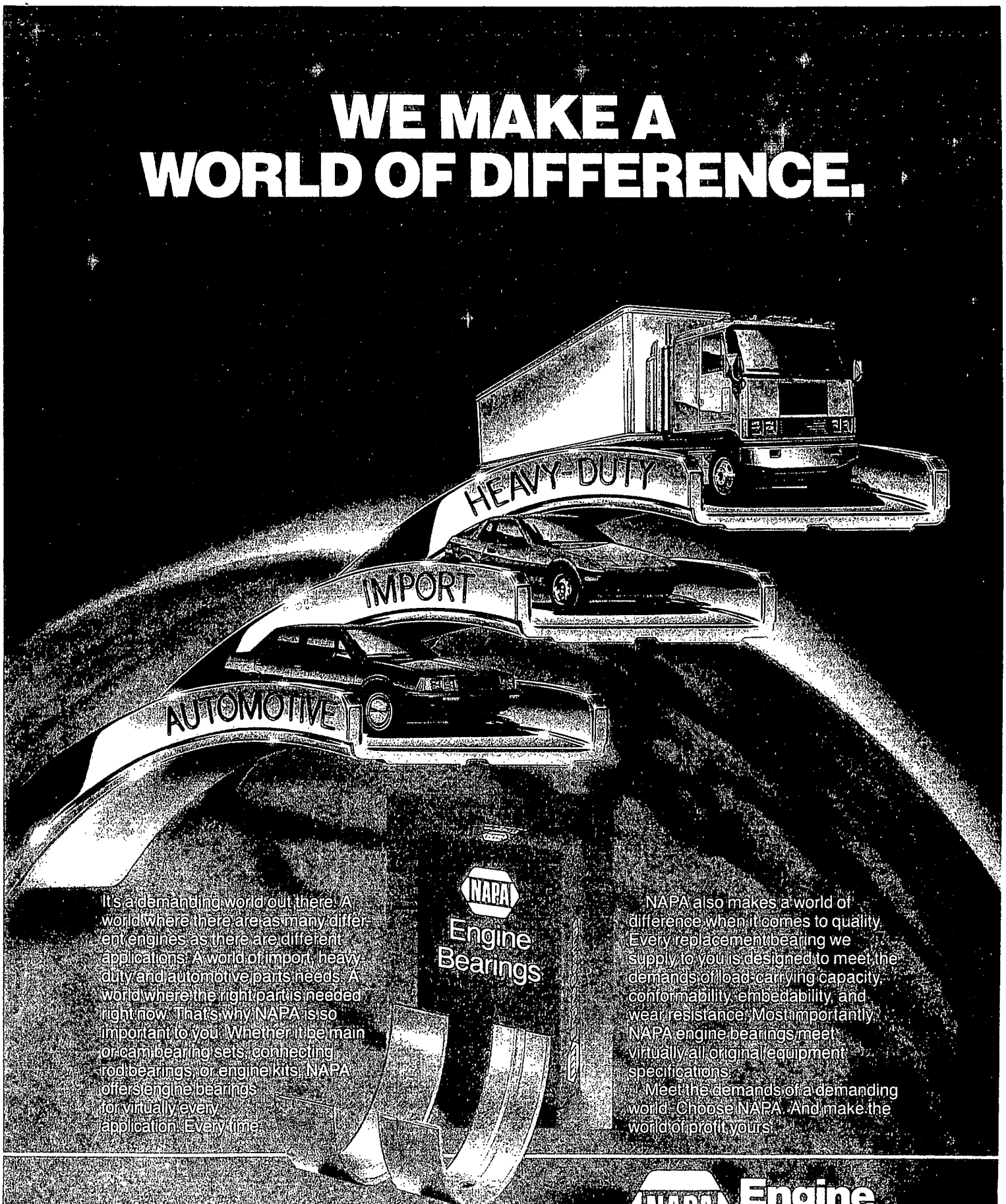
> ***"I know exactly how many dealers will attend and how much food and drink to prepare."***

Cropper asks for reservations and charges participants for attending his clinics. "By taking reservations for the clinics," says Cropper, "I know exactly how many dealers will attend and how much food and drink to prepare." This method makes it simpler for Cropper since he doesn't have to worry over late additions or cancellations.

All of the proceeds, after expenses are taken out, go to local charities. One of Cropper's latest clinics raised $328 for the Boy Scouts. Various charities are chosen by Cropper along with input from service dealers.

Cropper charges $15 per dealer for his clinics (held in a clinic area in his store) and has no trouble filling the 50 spaces his room allows. Cropper averages between 43-50 people for each clinic.

WE MAKE A WORLD OF DIFFERENCE.



It's a demanding world out there. A world where there are as many different engines as there are different applications. A world of import, heavy-duty and automotive parts needs. A world where the right part is needed right now. That's why NAPA is so important to you. Whether it be main or cam bearing sets, connecting rod bearings, or engine kits, NAPA offers engine bearings for virtually every application. Every time.

NAPA Engine Bearings

NAPA also makes a world of difference when it comes to quality. Every replacement bearing we supply to you is designed to meet the demands of load-carrying capacity, conformability, embedability, and wear resistance. Most importantly, NAPA engine bearings meet virtually all original equipment specifications.

Meet the demands of a demanding world. Choose NAPA. And make the world of profit yours.

NAPA Engine Bearings

NAPA NEWS & NEW! PRODUCTS

NAPA FILTERS INTRODUCES NEW FUEL DISPENSING PUMP FILTERS

NAPA Filters has introduced two new fuel dispensing pump filters — the NAPA 4009 Water Alert Gasoline Pump Filter and the NAPA 4011 Water Alert Diesel Fuel Pump Filter. Both pump filters are designed to overcome dirt and water contamination in car fuel tanks. Contaminants are filtered out as the fuel is drawn out of underground storage tanks into the dispensing pump.

Both pump filters provide an effective filtration of solid contaminants, drastically reducing the fuel flow from the dispensing pump when a harmful amount of water reaches the filters. Both filters include all the features of the standard NAPA dispensing pump filter, and the NAPA 4009 filter has the added benefit of water detection and automatic flow shut-off.

The NAPA 4009 and 4011 water alert dispensing filters were both designed to be used with the NAPA 4001 or 4034 spin-on mounting bases. For additional information consult pages 484-487 of the 1985 NAPA Filters Catalog or contact your NAPA Filters representatives.

NAPA MUFFLER AND SHOCKS INTRODUCES THE GAS CHARGED "GRANDE 60"

With its introduction of the new Gas Charged "Grande 60" shock absorber and the Gas Charged Load Stabilizer unit, NAPA Muffler and Shocks is now offering a fuller line of gas charged ride control products.

The NAPA Gas Charged "Grande 60" employs the most advanced technology available in the ride control industry. The combination of gas charging and full displacement valving provides a new level of performance for pickups, vans and 4-wheel drive vehicles (4 x 4's). The nitrogen gas charging results in improved shock performance, with better control and a smoother ride.

"Grande 60" shocks feature a 1-3/8 inch bore for more consistent control and a 5/8 inch rod for maximum strength. The ten-stage full displaced valving automatically adjusts to road extremes for better handling and control, regardless of the terrain.

Its durability, extreme handling characteristics and ride control enable the NAPA Gas Charged "Grande 60" to provide the ultimate in ride control for the light truck market.

For the smoothest load assist ride available, NAPA Muffler and Shocks has introduced the NAPA Gas Charged Load Stabilizer. Designed for improving riding comfort, control and handling, the unit is ideal for sagging suspensions caused by heavy loads or weakened springs.

NEW PRODUCTS AVAILABLE FROM NAPA LIGHTING

A number of new products are now available from NAPA Lighting and Safety Products. Included are Quartz Halogen Fog and Driving Lights, Snow Plow Light, Bar Marker Light and the West Coast Mirror.

The new, clear Fog and Driving Lights beam light forward in a pattern far beyond the range of regular high beams. The new yellow Fog Auxiliary Lights cut through fog, rain, and snow with ease and provide a wider headlight pattern for greater side-of-road visibility.

Providing 50% more seeing distance than standard incandescent bulbs, the Snow Plow Light, with its plastic halogen sealed beam, is the new lamp everyone is talking about. It weighs 70% less than similar bulbs, helping to absorb road shock in all kinds of rough terrain, even on the coldest of days.

The new Cushionlite Bar Marker Light is the latest addition to NAPA Lighting's already popular Cushionlite family. Because of its one-piece unibody construction that saves installation time and protects against gradual moisture, the Bar Marker Light is growing in popularity.

NAPA Light's new 6" x 16" West Coast Mirror is perfect for the medium size truck, class 3 on up to the heavy trucks, class 7 and 8. The West Coast mirror combines the strength and durability of aluminum and steel with outstanding value.

Contact your D.C. or NAPA Lighting and Safety Products representative for further information on this array of new products.

NAPA NEW CARBURETORS/HOLLEY CONTINUES TECHNICAL SERVICE CLINICS

More technical service and advice clinics from NAPA New Carburetors/Holley Replacement Parts will be offered during the 1985 racing season.

By season's end NAPA New Carburetors/Holley Replacement technicians will have serviced almost 6,000 carburetors and answered even more technical questions. Technicians will dissemble, clean, adjust and reassemble carburetors and provide free small repair parts. The remaining events on this year's schedule are as follows:

ASSOC.	MEET	DATES	LOCATION
NHRA	U.S. Nationals	Aug. 28-Sept. 2	Indianapolis, IN
NSRA	Nats North	Sept. 13-15	Detroit, MI
Peterson	4-Wheel Off Road Nats	Sept. 27-29	Indianapolis, IN
NHRA	World Final Nats	Oct. 18-20	Pomona, CA
Clinic	Halloween Classic	Oct. 25-27	Norwalk, OH

In addition to providing support at racing and street rod events, NAPA New Carburetors/Holley Replacement Parts also offers 50-75 technical clinics for jobbers each year. Each clinic is two to four hours long.

For more information regarding any type of clinic offered by NAPA New Carburetors/Holley Replacement Parts contact your D.C. or NAPA New Carburetors/Holley Replacement representative.

NAPA/MAC'S NEW LIQUID CAR WASH

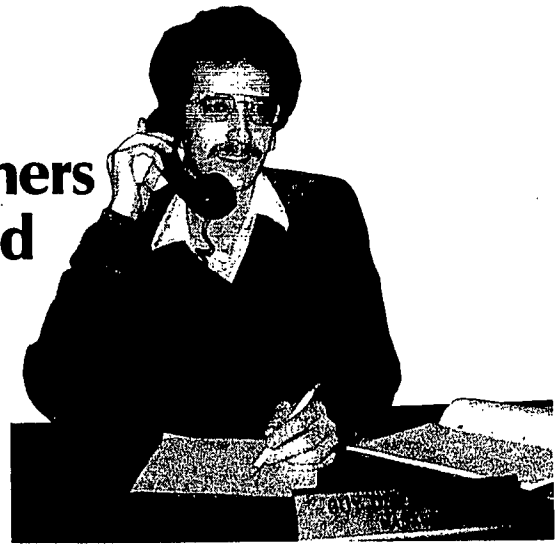
Taking advantage of consumer demand for improved car appearance products, NAPA/Mac's is introducing its fourth new product in only six months — Blue Max Liquid Car Wash.

The Blue Max Liquid Car Wash is available in 16-ounce containers from all NAPA Distribution Centers.

Each bottle provides 32 washes and is uniquely formulated to powerfully clean even the dirtiest of vehicles, without harming today's modern automotive finishes. To find out more about this product and others offered by NAPA/Mac's, contact your D.C. or NAPA/Mac's representative.

A NAPA Jobber Speaks Out

"Our Body Shop Customers Know They Can Depend On Us To Have What They Need When They Need It"



Guy Kaplowitz
Manager, Riverside Auto Parts and Lakeside Automotive Stores

The payoff has been a 60% increase in sales and profit dollars every year from paint and refinishing products.

Guy Kaplowitz knows the story well. He's been managing NAPA Jobber stores since 1976. Three and a half years ago, he took on the complete Martin-Senour refinishing line. Today, Guy works as manager *and* outside salesman of two automotive parts stores. His boss, John Hawkinson, owns three successful NAPA stores in Illinois– Hawks Auto Parts of Elgin, Riverside Auto Parts in South Elgin, and Lakeside Automotive in Bartlett.

Sales Depend on Daily Calls

"When I first started out in the parts business, I found that to be successful you have to make calls every day. I also discovered that a surprising number of accounts, such as car dealers, body shops, garages, fleets, and industrial accounts were unhappy with the service they were getting from their paint suppliers. I knew I could give them better service. But I wanted to be certain the market potential was there, so I did a market survey."



Switched to Martin-Senour Line, Business Prospered

"I was pleasantly surprised to learn how much business was available. We had always handled spray cans and a few specialty refinishing items. However, the day we took on the complete Martin-Senour line, our business took off. Since then, our paint and refinishing products have averaged a 60% increase a year in sales and profit dollars."

Martin-Senour Line Now #1 in Sales

"Today, the Martin-Senour line is one of my biggest profit makers, and number one line in sales. Our complete mixing program covers five different finishes: Acrylic Enamel, Acrylic Lacquer, NITRAM, UREGLO, and Vinyl. Martin-Senour quality meets or exceeds anything competition has to offer. Also, our prices are very competitive. Add our good service, and it's easy to see why our paint business is growing by leaps and bounds. Our customers know they can depend on us to have what they need when they need it.

"We are proud of our Martin-Senour line and extremely pleased at the way sales are increasing. Frankly, that's why we are devoting increased floor space to their display."

Good Profits From Easy Sales

"Any NAPA Jobber not selling the Martin-Senour line should seriously consider a market survey to determine his true market potential. And if he sells to car dealers, body shops, fleets, and industrial-type accounts, I strongly recommend that he take on the complete Martin-Senour line. I know from experience that the Martin-Senour line is well accepted in the marketplace. It's easy to sell and very profitable."

NAPA

Paints, Tapes, Abrasives, and Adhesives

SENOUR PAINTS

The Future Is Yours

(Editor's Note: The following is an edited copy of the speech delivered by ***NAPA President Robert E. McKenna*** *to the Automotive Service Councils (ASC) during its recent conference in Reno, Nevada. It is included here as it provides a statement of NAPA's philosophy toward the service repair industry and a comprehensive look at that industry's past, current conditions and growth opportunities which lie ahead.)*

Personally, I consider it a privilege and an honor to be asked to deliver the keynote talk to your fine organization. I congratulate you on an excellent meeting so far and I know it will continue to go well. I also congratulate you on your 30th anniversary. This is an outstanding organization which has done a tremendous amount for our industry.

The leadership of Bud Merwin, Moon Mullin, your Board of Directors and Past Presidents and Chairmen is a big part of the A.S.C. success. Coming from a similar type organization to yours, I can assure you that you folks in this room, the membership, are what really has, does and always will make this organization what it is. I commend you for your past accomplishments and encourage you to keep it up.

In sharing some thoughts and ideas with you this morning, I want to tell you how seriously I've taken this assignment. For the last several months I've been talking, reading and thinking in every free moment about where this great industry of ours is going and what the plight of the service/repair dealer will be in the future.

I thought I knew the answers before I started, but now I'm even more convinced that the future is yours, mine and anyone else's in this business if they do the right things.

I'm going to take the next 20 or 30 minutes and try to tell you why the future is ours. I'm not going to say anything you haven't seen or heard before, but I'll try to put it all together so it makes some sense to you. And hopefully prove to you that the future is yours.

All of us in this business have a common desire — to service the motoring public! It's a great business and a very effective one. After all, we are able to keep the millions of cars and trucks on the road today running.

Let me also add that in case you think I have an ulterior motive for being here — you're right. There are a lot of parts purchases represented in this audience, and I can tell you if you're not buying from NAPA you should be and I'm asking for the business. If you are buying from NAPA we thank you for your business, and we hope to keep earning it every day.

That is the last commercial thing I'll say. NAPA and A.S.C. have much in common. Our ideals, goals, and purpose are very similar. Both of our organizations' members have smaller, independently owned businesses and are trying to provide a much needed service and make a decent living for their families. Truly, you personify the American dream and are examples of our free enterprise, capitalistic system. I'm proud to be associated with our NAPA Jobbers as I know Bud is with you fine people.

Enough patting ourselves on the back. Let's get down to the job at hand — to tell you why "The Future Is Yours."

What I will attempt to do is show you a lot of supporting evidence about:

1. The automotive industry.
2. The automotive aftermarket — the industry trend indicators (i.e., number of cars, their average age, miles driven, etc.), its size and scope and where you fit, where repairs are done and by whom.
3. Some statistics about service dealers.

This is all to prove and support my contention that you people are on the threshold of a truly great opportunity if you only grasp it.

THE AUTOMOTIVE INDUSTRY

Let's talk for a few minutes about the automotive industry. It is second only to food in its contribution to the GNP. It is a huge, dynamic and yet stable and conservative business. It's international in scope and probably touches and affects every person in America in one way or another.

That's the industry of which we are all a part.

That's important because it means the potential that we have is practically unlimited and it is involved with a product that is essential to everyone — personal transportation.

Let me give you some facts:

1. There are 168.6 million cars and trucks on the road (130 million cars and 38.6 million trucks).
2. There were 10.4 million new cars sold in 1984 (average cost $12,200).
3. There were 17.3 million used cars sold (average cost $4,900) in 1984.
4. There are 1.28 cars for every household (31% with 2 cars — 30% with 3 cars).
5. There were 1.7 trillion miles driven in 1984.
6. Someone who owns a car for 12 years will spend $30-36,000 on it, of which $7,000 will be for maintenance.

I could go on but I think you get the idea.

THE AUTOMOTIVE AFTERMARKET

The total automotive aftermarket in 1983, at the retail sales level, was $86.2 billion. It's made up of the auto service market ($59.0 billion) and the over-the-counter market ($27.2 billion). That's big business in anyone's book.

The aftermarket is defined, in my terms, as what it takes in service and parts to keep the cars and trucks performing after they are bought. A person buys a vehicle for a purpose — fun, to get to work, to haul something — whatever it may be. The aftermarket makes sure that a vehicle keeps being able to perform that function and provide that service to its owners.

There are many things that affect the potential of just how much business there is for you to participate in. After all, the more business there is the better chance you have to get more — the better for your future prospects. Here we need to consider:

1. The number of vehicles on the road is key and the growth line of that number is important. The number of cars and trucks registered has grown steadily for years and is predicted to keep growing in the future at about 2-4%.
2. The growth of vehicles on the road is attributed to several things. It's a function of the number of cars sold less the number scrapped each year. As you can see the difference was greater before the fuel crunches, but 1984 is a good indicator.
3. It doesn't matter how many cars there are if they aren't driven. Obviously, the miles driven is affected by the cost of fuel. You know that 1.7 trillion miles were driven in 1984. That was an increase of 5% and is by far a record number; and through March, 1985, the number is up by 3%. Real gas prices peaked in 1980 and the amount of miles driven was down. Prospects are for a continuation of this trend of relatively cheap fuel, better MPG by cars and increases in miles driven — all of these factors meaning that the parts wear out faster and give us all more business.
4. Another direct factor affecting the service business, besides miles driven, is the age of the vehicle. The average age of passenger cars in 1970 was 5.6 years, in 1982 7.2 years, and those cars are getting older all the time. In the over 3 years category, which is where you really get in the act, are over 80% of these cars — up significantly from 1970 when only 70% were over 3 years old. Just consider how many vehicles are over 12 years old.
5. One other significant fact that bears mentioning is the number of models and engines on the road. In the 1984 model year alone there were 305 domestic and 95 import models, with 100 different engines — 35 domestic; 65 imports. In the last 5 years we have added 27,794 part numbers to our system and dropped 23,306. That's just in five years, so you can see the volatility of parts. Be sure you're buying parts from a source that protects you from obsolescence.

Before getting into any more detailed information on size and scope, let me show you how complex this industry has become. This also gives you some insight into how many organizations and companies are battling for the business. Chart 1 *(opposite page)* shows parts distribution, but it also depicts the actual service areas.

We have the vehicle owner on the bottom but he should be on the top. This whole massive structure is driven by that car owner — be it a he or she, old or young, import or domestic car owner. That's what all of this is about — meeting the consumer wants, desires and needs.

He has several areas to choose. First, he must decide if he is going to fix it himself or have it fixed. If he is going to have it fixed, which I believe he will do more and more, he can choose from:

- Auto service centers (K-Mart, Sears, Firestone);
- Specialty service shops (Midas, Precision Tune, AAMCO);
- Service stations;
- General or independent garages;
- Vehicle dealers.

We'll talk more about the consumer later and what you need to be doing to satisfy him.

As you can see we are all one big happy family, selling to and competing with each other on a daily basis. Even some of the manufacturers are opening their own repair shops and selling direct to anyone and everyone. Everyone seems to be hedging their bets and covering their flanks by trying to be sure they have ways to the consumer no matter what choice he makes.

It's in a real confused state now. Eventually it will be straightened out but it will take time and some will suffer and go away.

To set the record straight, NAPA doesn't compete in the service arena and we don't ever intend to. We have a few of our independent jobbers who have tried and some are still in it, but it would be far less than 1% of our jobbers and they have made the decision on their own.

Here is where NAPA gets its business:

- 41% — Garage, service station, body shops;
- 28% — D-I-Y (as compared to industry averages of 35%-40%);
- 11% — fleets;
- 12% — farm;
- 8% — industrial/institutional.

That's enough about NAPA. But I thought you should know that I'm not up here saying one thing while we're out there doing something else.

If you recall earlier, I quoted some numbers about the size of the total aftermarket. Here is more detail.

At 1983 retail sales, the total aftermarket was $86.2 billion made up of $59.0 billion in service sales and $27.2 billion in over the counter sales *(see chart 2)*. This includes tires, batteries, oil, accessories — the works — plus service labor.

Of the total, you folks participated in 63.9% of the market share in the last two columns. In the service market only, you had 86.1% of the business, or $50.7 billion in 1983.

Let's break this down and look just at service dealer sales. Here, I have 1984 information that isn't even released yet. Our good friends at Hunter Publishing are about to publish their 3 year service job analysis and Al Joseph was kind enough to let me have some of the numbers listed in chart 3.

Chart 1

The Distribution of Replacement Auto Parts

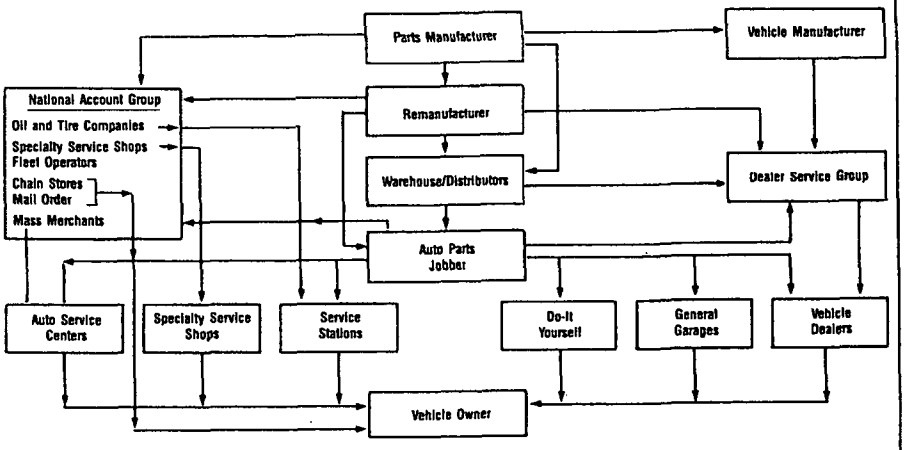


Chart 2

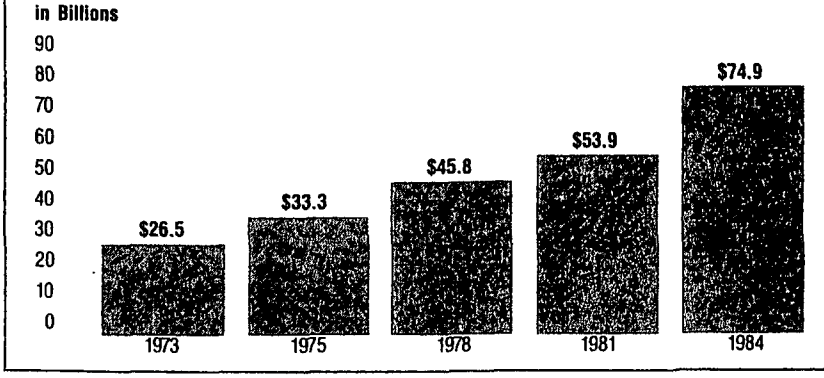
The Total Automotive Aftermarket
(Estimated 1983 Retail Sales in Millions of Dollars)

	Total Retail Sales	Tire Stores	Auto Supply Chains	Mass Mdrs.	Garages Franchised Specialists	Other: Car Dealers Gas Stations Jobber - Retailers
Automotive Service Mkt.	$59,003	3,744	2,011	2,489	24,552	26,210
Percent	100.0	6.3	3.4	4.2	41.6	44.5
Over-the-Counter Mkt.	$27,240	5,066	9,856	8,055	—	4,263
Percent	100.0	18.6	36.2	29.6	—	15.6
Total Aftermarket	$86,243	8,810	11,867	10,544	24,552	30,473
Percent	100.0	10.2	13.8	12.1	28.5	35.4

Source: Lindsay-Kaufman Company, March 1984

Chart 3

Total Service Dealer Sales
(Parts and Labor at Retail)



The growth in parts and labor since 1973 has almost tripled, just in the last 3 years going from $53.9 billion to $74.9 billion —

(Continued on next page)

The Future Is Yours

(Continued from page 9)

up $21.0 billion or 39%. Who says this isn't a growth business? I think you can see the opportunities that are out there for you and your fellow service dealers — unbelievable opportunities.

Well, you're probably saying, "That's great, McKenna. You know it, we know it and so does everyone else. So what? There is more competition than ever before and I just can't get any more growth. I've tried." Well, I don't really believe any of you are saying that. But there are lots of your fellow service dealers who are. But let me show you that it can be turned around. The future is yours, or anyone's, who is willing to do what it takes to get the business.

Here is the number of outlets by type since 1981 compared to 1984.

	1984	1981
S.S. (Doing Repairs)	115,000	120,000
Ind. Garage	150,000	136,000
Dealers	25,000	28,000
Specialty	16,400	13,100
Tire Stores	12,200	14,800
Fleet Service	39,000	39,000
Total	357,600	350,900

Many changes have occurred but the net result is that not a lot of new outlets have been built as compared to the growth in vehicles and miles driven and the increased age of cars. That means there is more business to split between about the same number of outlets.

Let's look deeper into the repair business — where it is, who's doing the work and what the potential and the actual experience is for several key segments of the service dealer market.

Chart 4 shows that there is much more service work being done and most of it is being done by service stations and garages.

Now let's look at charts 5, 6, and 7 and see where parts are purchased. This is a definite indicator of where the total business goes including D-I-Y.

Again, I think this points out the tremendous amount of the business that is being done by the service dealer, the changes that are coming and the great potential that is ahead.

Before going any further, I would like to make a statement about D-I-Y business. My opinion is that the D-I-Y market will continue to be 20-25% of the total service and parts market for several more years but that it will level off and decline in the future. This is because the demographics of our population and the technical aspects of automobile repair are mind boggling. The equipment and tools needed to repair automobiles are becoming more complicated every day. I just don't believe the capability will be there for the D-I-Y'er and I don't think the desire will be there as the general public gets more leisure time and becomes more affluent. You should realize and acknowledge this and expect the auto parts jobber to try to get all this business he can.

Chart 4

Number of Jobs Performed in 1984 (Add 000)

	Total Jobs	Service Stations	Repair Shops	Car/Truck Dealers	Fleet Repair Shops
Engines Overhauled (Car)	2,792	476	1,273	962	81
Carburetors Installed (New)	1,553	529	785	134	105
Engine Tune-Ups (Car)	58,422	19,949	25,902	11,162	1,409
V-Belts Installed	52,087	24,503	19,683	5,650	2,251
Mufflers Replaced (Car)	13,793	5,917	5,704	1,948	224
Front End Alignment Jobs	22,216	5,216	11,236	5,410	354
Shock Absorbers Replaced	25,509	10,270	12,212	2,151	876
MacPherson Strut Cartridges Installed	4,064	948	2,415	626	75

Chart 5

Where Automobile Parts Are Purchased
Store Types and Percentage of Product Sales

				Service Outlets			
Engine	Annual Purchase Rate	Traditional Auto Parts/ Home & Auto	Mass Merchandisers	Gas Stations	Repair Garage	Sub Total	Specialty Service
Spark Plugs	42%	30%	17%	12%	22%	34%	5%
Rotor	10%	41%	13%	10%	19%	29%	4%
Points	9%	42%	14%	10%	18%	28%	3%
Distributor	10%	41%	13%	11%	18%	29%	5%
Air Filter	46%	24%	27%	14%	17%	31%	5%
Fuel Filter	3%	27%	16%	14%	25%	39%	4%
Oil Filter	98%	21%	26%	16%	18%	34%	6%
Fuel Pump	3%	40%	4%	13%	23%	36%	2%
Water Pump	4%	37%	3%	16%	24%	40%	3%

Chart 6

Where Automobile Parts Are Purchased
Store Types and Percentage of Product Sales

				Service Outlets			
Electrical	Annual Purchase Rate	Traditional Auto Parts/ Home & Auto	Mass Merchandisers	Gas Stations	Repair Garage	Sub Total	Specialty Service
Battery	18%	15%	42%	14%	10%	24%	5%
Alternator	4%	29%	5%	15%	23%	38%	3%
Starter	4%	35%	5%	15%	21%	36%	3%
Safety							
Wiper Blades	24%	29%	28%	17%	11%	28%	2%
Headlights	7%	32%	31%	12%	10%	22%	2%
Thermostat	5%	43%	10%	14%	18%	32%	1%

He needs it to survive, but he should never let it affect the service he gives you.

Now I'd like to take a specific look at the number of outlets and the dollar sales by outlet of service stations, independent repair shops and car/truck dealers.

Let me summarize:

- **Service Stations** *(see chart 8)*
  1973 to 1984 — 194,000 outlets to 115,000

— 8.2 billion to $18.9 billion
1978 to 1984 — $81,700/outlet to $164,500

There are less outlets doing much, much more business.

- **Independent Garages** *(see chart 9)*
  1973 to 1984 — 108,000 outlets to 150,000
  — $9.9 billion to $40.5 billion
  1978 to 1984 — $171,500/outlet to $270,000

  There are many more outlets doing a whole lot more business.
- **New Car/Truck Dealer** *(see chart 10, page 12)*
  1973 to 1984 — 39,000 outlets to 25,000
  — $8.4 billion to $15.6 billion
  1978 to 1984 — $360,000/outlet to $622,500

  There are a lot less outlets doing lots more business.

Truly the future is yours. The market is tremendous and growing every day.

There are lots of myths in this business. We all try to talk ourselves into believing what we want to believe. In NAPA we deal with all aspects of this great industry and I can tell you without question or hesitation that the future is yours — if. Yes, there is no question about the potentialities, but there are two big ifs — the consumer and your competition.

To me the number one, biggest if is the consumer — not if there are enough of them or if they will all drive imports and do their own work. It's not that, but whether you will be responsive to his needs or not. To those who respond, success will follow. To those who don't, they will surely fail.

We all have been guilty of ignoring the consumer, while others have served his needs and grabbed segments of the repair business right out from under our noses. Yours and mine. That's right, when the traditional end of this business loses market share NAPA suffers right along with you, because we and other traditional distributors built our system and service for your needs, not for the needs of the specialty shop or the mass merchandiser. We have adjusted our system to serve these markets and have done it well, but we don't and can't get all or even most of their business.

The consumer today is smarter, better informed, more conscious of his own wants and needs, more quality conscious, and spoiled! Yes, spoiled! We have become so scientific in all business and have learned so much about consumer market segmentation that in all areas from underwear, to bathroom tissue, to food, to watches — there are hundreds of examples of segmenting a group and zeroing in on that market niche with a product and an ad campaign. And the consumer has been spoiled. He expects to get just what he wants when he wants it.

Look at the fast food business. Just a few years ago Ray Kroc discovered that if you have a clean facility, give good service and a quality product at a good price and keep your menu simple, you can be a success. McDonald's still has the greatest share of that market but look at all the competition — each with their own little angle, ploy or specialty to attract a certain segment of the market — and it works.

So why don't you spoil your customer?

My point is — decide what you're going to be and be the best you can. You can't be all things to all people, but you can be sensitive to your customers needs. I can guarantee your success if you have a good, clean and well-organized shop, have competent, well-trained and highly motivated employees, have the right equipment, you're conveniently located, treat the

(Continued on next page)

Chart 7

Where Automobile Parts Are Purchased

Store Types and Percentage of Product Sales

Undercar	Annual Purchase Rate	Traditional Auto Parts/ Home & Auto	Mass Merchandisers	Service Outlets: Gas Stations	Service Outlets: Repair Garage	Service Outlets: Sub Total	Specialty Service
Regular Shocks	6%	17%	37%	7%	11%	18%	19%
Struts	1%	13%	19%	7%	25%	32%	25%
Tires	33%	3%	17%	12%	4%	16%	55%
Alignment	27%	2%	10%	14%	28%	42%	36%
Brake Lining	11%	28%	6%	13%	25%	38%	14%
Muffler	12%	16%	13%	10%	12%	22%	41%
Catalytic Converter	1%	0%	4%	11%	46%	56%	21%

Chart 8

Service Stations by Annual Repair and Service Dollar Volume

Annual Repair and Service Volume	% of Stations 1981	% of Stations 1984	Number of Stations 1981	Number of Stations 1984
Under $20,000	10.0%	7.2%	12,000	8,280
$20,000 - $39,999	15.7%	9.4%	18,840	10,810
$40,000 - $59,999	12.4%	10.3%	14,880	11,845
$60,000 - $99,999	22.7%	16.9%	27,240	19,435
$100,000 - $149,999	17.5%	17.4%	21,000	20,010
$150,000 and Over	21.7%	38.8%	26,040	44,620
	100.0%	100.0%	120,000	115,000

Chart 9

Independent Repair Shops by Annual Dollar Volume

Annual Repair and Service Volume	% of Shops 1981	% of Shops 1984	Number of Shops 1981	Number of Shops 1984
Under $60,000	22.3%	15.5%	30,328	23,250
$60,000 - $99,999	16.7%	11.1%	22,712	16,650
$100,000 - $149,999	18.4%	18.9%	25,024	28,350
$150,000 - $249,999	16.3%	20.7%	22,168	31,050
$250,000 and Over	26.3%	33.8%	35,768	50,700
	100.0%	100.0%	136,000	150,000

The Future Is Yours

(Continued from page 11)

customer fairly and with integrity (that is, do what you say you will do) and be fair in your costs. Give your customer value, not just low prices. It sounds simple and it is, if you just decide you're going to do it.

One final point about consumers. Today's consumer is not loyal! That may be hard for you to take — it is for me — but it's true. On the average, only 37% of the shoppers in a given store have loyalty to that store.

We may not be as badly off in the repair business, but the problem is the consumer has too many choices. If he doesn't like what he gets from you, he's got lots of good alternatives. My answer to this is to change your customers' attitude. Treat them so good they won't even think about going somewhere else. I'm sure that 37% figure is correct, but for you it can be 100% and forget everyone else.

How about your competition? Or more importantly, what are you going to do to secure your future? Are you going to forget what your competition is or does?

I can tell you what they're going to do — bury you, eat your breakfast, lunch and dinner, if you let them.

Car Repairs Guaranteed For Life!

Have any of you seen the Ford Motor Company's inside, front cover, fold out ad that was just in *Time* magazine and read by millions of people? These ads are appearing, along with similar types of ads from your competition, in millions of consumer magazines and on TV commercials daily. I am not picking on Ford Motor Company with this, but it is just an example of what is going on daily.

Briefly, the ad focuses on what Ford calls the guarantee of a lifetime. It talks about free parts and free labor and states that, "the list of what's covered reads like an inventory of the Ford Motor Company Parts Department." At the end of the ad, the copy reads, "Next time you need a repair, see your participating Ford or Lincoln-Mercury dealer."

This type of marketing, along with the 5 year/50,000 mile warranty could be a serious detriment to your future and ours. What can we do about it? We can support the industry action on the 5 year/50,000 mile problem.

As to this type of competition, it is serious and I can assure you NAPA is doing something about it and I'm sure others will be too. But we have very specific programs and plans to combat this and give you, the independent service station, garage and body shop, some marketing and merchandising ammunition to fight back at all of this type of competition. It's got to be done and we plan to help but you must be aware and do it in your own town.

Chart 10

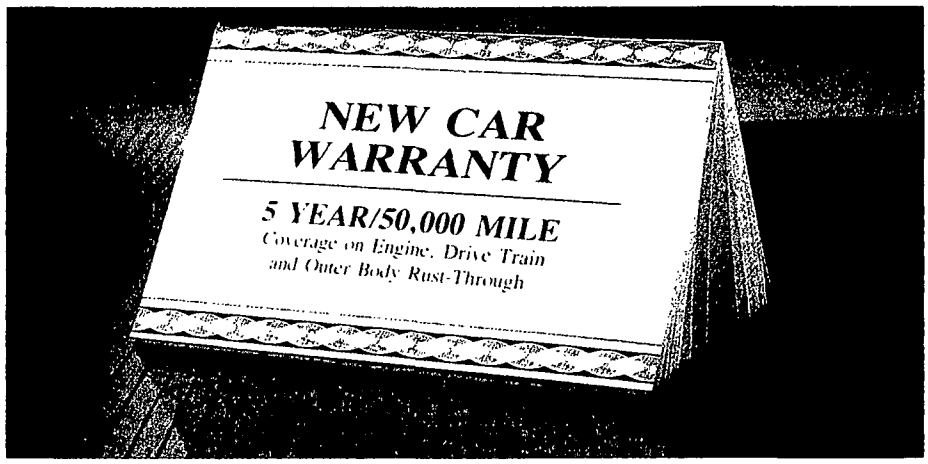
New Car/Truck Dealers by Annual Repair and Service Dollar Volume

Annual Repair and Service Volume	% of Shops 1981	% of Shops 1984	Number of Dealers 1981	Number of Dealers 1984
Under $80,000	11.4%	7.4%	3,192	1,850
$80,000 - $149,999	20.6%	12.0%	5,768	3,000
$150,000 - $249,999	20.6%	15.8%	5,768	3,950
$250,000 - $499,999	22.5%	26.2%	6,300	6,550
$500,000 and Over	24.9%	38.6%	6,972	9,650
	100.0%	100.0%	28,000	25,000

What About The "If's" In Your Future?

To survive in the future you not only need to be a skilled technician and businessman, but you must become a marketer. Like it or not you need to be merchandising and advertising your shop and your service — otherwise the Firestones, Fords, GM Service, Midas, Precision Tune, Jiffylube, AAMCO's and all the rest will put you right out of business.

- Full obsolescence protection
- Outstanding warranties that they stand behind
- Technical training
- Factory service personnel
- Full Line Coverage and Availability
- Competitive Prices (to get all of the above costs money so the lowest may not always be the best, remember you get what you pay for)
- Most Importantly For The Future — Marketing, Merchandising & Advertising assistance.



There is help! Your best partner can be a source of parts supply. This could be NAPA or ~~anyone~~ of the good traditional parts ~~distributors~~ who offer you a complete package of full service supply. You see, we also have a stake in your future. For us to get the parts sales we must have the service repair dealers to install them. Sure, we get some D-I-Y business, but 72% of our business is installed by a professional mechanic.

We have an old saying in the parts business, "That you don't buy a profit, you sell at a profit." Keep that in mind and look for a source of supply that will give you:

- Quality products
- Excellent service

My desire is that everyone of us continue to professionalize our industry and raise it to higher levels of integrity, competence and professionalism. I'm proud to be a part of it as I know you are.

We are performing an honest-to-goodness service that is needed by millions. We have been the subject of much criticism and malignment in the past, but I believe those days are gone. You can continue to raise the standards and dignity of this great profession if you put your mind to it. I know you can and I believe you will.

The future is yours — if you only want it and reach out and take it.

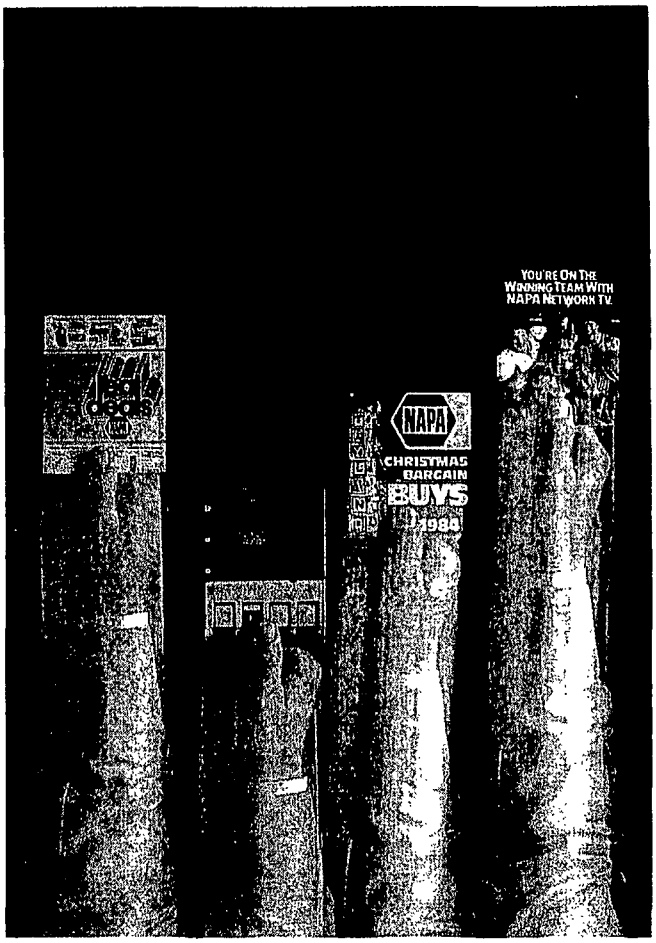
Thank you for allowing me to be a part of your great meeting. It's been a real pleasure.

HOW JOBBERS RATE THE NAPA MARKETING PROGRAM

Approximately two years ago, NAPA Headquarters began a formal system to gain objective input from jobbers to the NAPA marketing programs. We surveyed all of the NAPA Jobber/Owners through a questionnaire. The information received from that survey was invaluable in identifying the program elements that were most effective for NAPA Jobbers as well as those elements that needed improvement.

In January of this year, NAPA Headquarters again sent out surveys to all of the NAPA Jobbers/Owners across the country. The questionnaires were designed to enable these jobber/owners to rate the effectiveness of various elements of NAPA's 1984 marketing program.

Eleven hundred jobbers/owners responded to this recent survey, 38% more than responded to the survey conducted in 1983. Responses were received from every category of jobber — from the smallest to the largest — in this latest survey. In fact, one out of every four jobber/owners took the time to respond and those respondents represent 50% of NAPA Jobber sales.



The survey began with some general questions about each jobber's business. So in addition to discovering how the jobbers felt about the advertising programs, we were able to learn some interesting facts. Based on the survey responses:

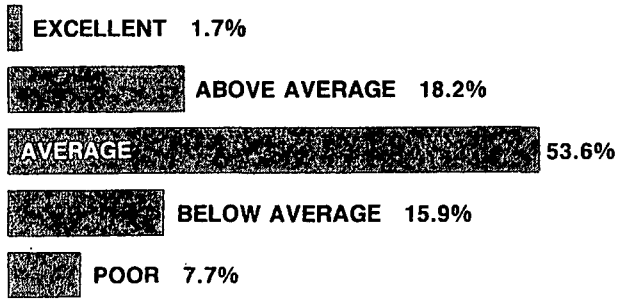
- The average annual dollar sales of the individual jobbers who responded is $932,000, representing a combined total of $959,750,000.
- The mean number of stores per respondent was 1.8 — 69.4% having one store and 13.9% having two.
- Forty-one percent of these jobbers sales are to the traditional market, 28% are to the retail market, 12% to the farm market, 10.9% are to the fleet market and 8.2% are to the industrial/institutional market.
- Approximately one-fourth of the responding jobbers do not have a machine shop.
- Ninety-seven percent of the jobbers who participated in the survey are open at least a half-day on Saturday, 16% are open on Sunday, and 20% are open on some evenings.
- When asked about computers, 59% of the respondents stated that they have one. Forty percent of the respondents do not have a computer but of that 40%, 16.7% plan to purchase one within the next year.
- One-half of the responding jobbers have a full time outside force.

After the general questioning was completed, the survey then began probing into the jobbers' opinions of the sales impact of the overall 1984 advertising program *(shown on chart A below)*. To measure most of the results a five point scale was used, five being excellent and one being poor. More than 50% of the jobbers described the overall 1984 program as average and almost 20% described it as above average. Of all the advertising programs, jobbers indicated that they like the network television spots the

(Continued on page 14)

CHART A

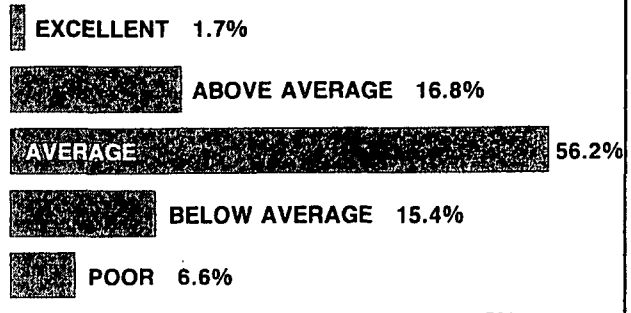
Opinion of Sales Impact Realized From Overall '84 Advertising Program



Above Average Total 19.9%
Average Total 53.6%
Below Average Total 23.6%
Mean Answer: 2.90 (slightly below average)

CHART B

Opinion of Sales Impact of '84 Car Care Days Promotions Compared to Previous Years



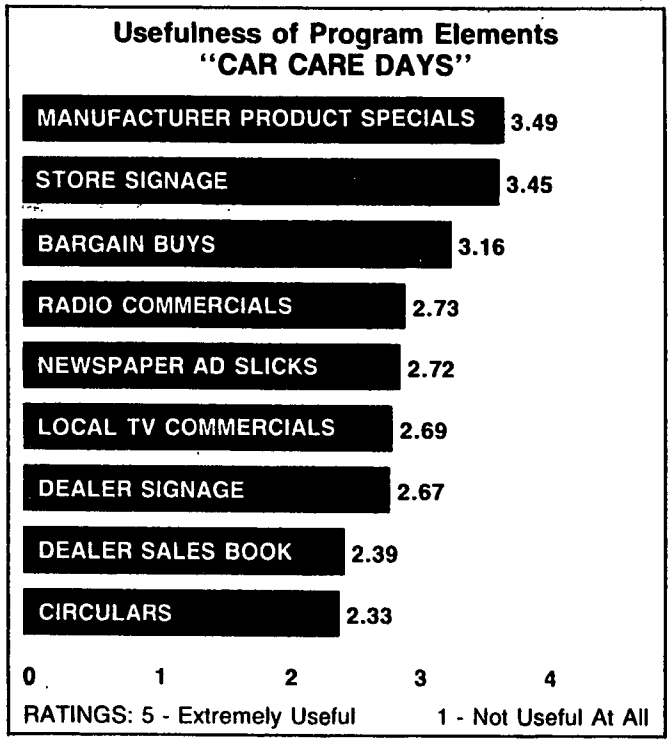
Above Average Total 18.5%
Average Total 56.2%
Below Average Total 22.0%
Mean Answer: 2.91 (slightly below average)

best. Real Deals were also received favorably. On the other hand, jobbers had more concerns about circulars than any other aspect of the overall program.

The jobbers were then asked to rate the overall sales impact of the 1984 Car Care Days promotions, again using the five point scale *(see chart B, previous page)*. On the whole, Car Care Days promotions received a rating of slightly below average. The results were:

- Manufacturer product specials, store signage and Bargain Buys achieved an above average rating from the respondents.
- Both the Dealer Sales Book and the Circulars received a below average rating from the respondents in their Car Care Days promotion impact *(see chart C, below)*.

CHART C



An additional question concerned participation in the 1984 Bargain Buys promotion. Over two-thirds of the respondents had participated in the program. This is what the jobbers had to say:

- Over 77% of the jobbers participating in the survey plan to take advantage of this program again, as indicated in chart D.
- When asked to indicate any major problems with or suggested improvements for the Bargain Buys program, product selection cost and profit results were mentioned most often.

In the area of Dealer Programs, jobbers gave their opinions on Real Deals and Statement Stuffers. Overall opinion on the Real Deals program was favorable with over three-fourths of the surveyed jobbers saying they participate and 63.8% of that three-quarters are planning to again take part in the Real Deals Dealer program. Just under 10% of those who have not taken advantage of Real Deals plan on joining the program at a later date, bringing the percentage of future participation up to 73.5%.

Certain information was also discovered *(seen in chart E)* about Real Deals in the farm and industrial/institutional markets:

- Seventy-two point five percent of the qualified respondents (i.e., qualified being those jobbers/owners who make 5% or more of their total sales to the farm market, plan on using the Real Deals program with their farm customers. Sixty-seven percent have used the program in the past as seen in chart F.
- Qualified respondents (i.e., qualified respondents being those jobbers/owners who make 5% or more of their total sales to the industrial/institutional market) indicate a 72.5% participation rate in the use of Real Deals with fleet, industrial or institutional customers. Future use in this market is projected, measured by jobber response, to increase to 78.4%, as seen in chart G on opposite page.

Regarding the Statement Stuffer program, nearly one-third of

CHART D

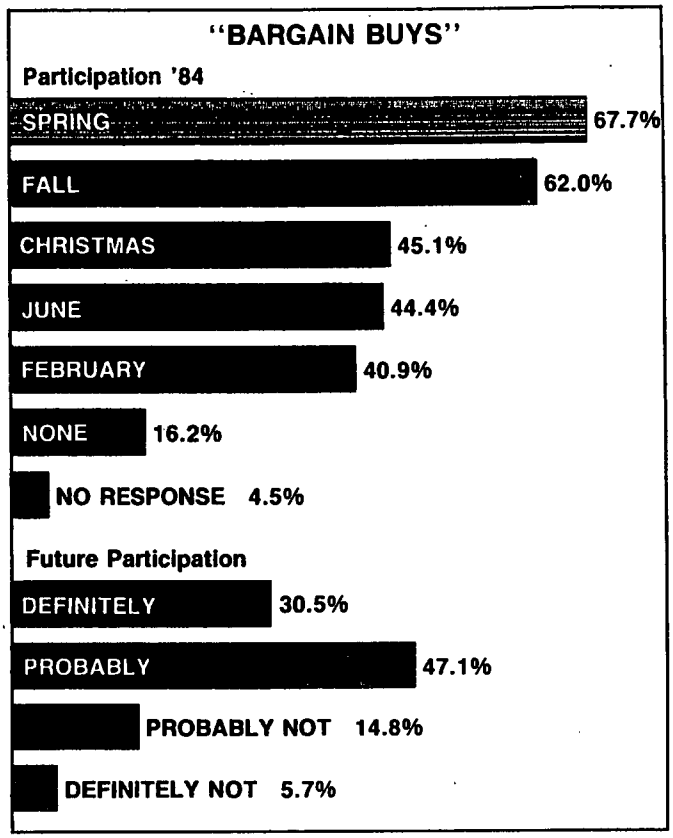


CHART E

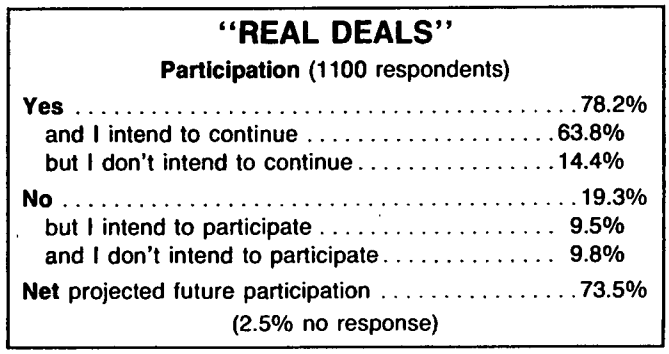


CHART F

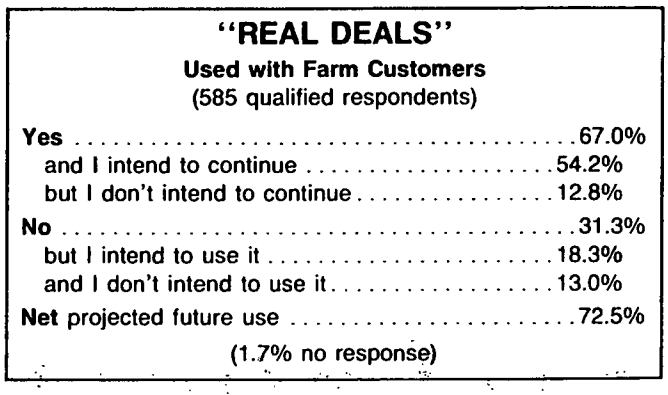


CHART G

"REAL DEALS"

Used with Fleet, Industrial, or Institutional Customers
(773 qualified respondents)

Yes	72.5%
and I intend to continue	62.7%
but I don't intend to continue	9.8%
No	26.5%
but I intend to use it	14.7%
and I don't intend to use it	11.8%
Net projected future use	78.4%

(.9% no response)

the responding jobbers distribute them to their dealer customers and even more are planning to use the program in the future.

The jobbers were also asked their opinion of the Door Opener Direct Mail Program. In the farm market, current usage is only 12.1% as shown in chart H. But 44.3% of the qualified respondents plan on joining this program. Among the qualified respondents in the fleet, industrial or institutional market 20.1% utilize the Door Opener Direct Mail Program and 48.8% plan on taking part in the program at a later time *(see chart I, below).*

CHART H

"Door Opener" Direct Mail Program

Used with:
Prospective Farm Customers
(585 qualified respondents)

Yes	12.1%
and I intend to continue	7.5%
but I don't intend to continue	4.6%
No	84.7%
but I intend to use it	36.8%
and I don't intend to use it	47.9%
Net projected future use	44.3%

(3.2% no response)

CHART I

"Door Opener" Direct Mail Program

Used with:
Prospective Fleet, Industrial, or Institutional Customers
(773 qualified respondents)

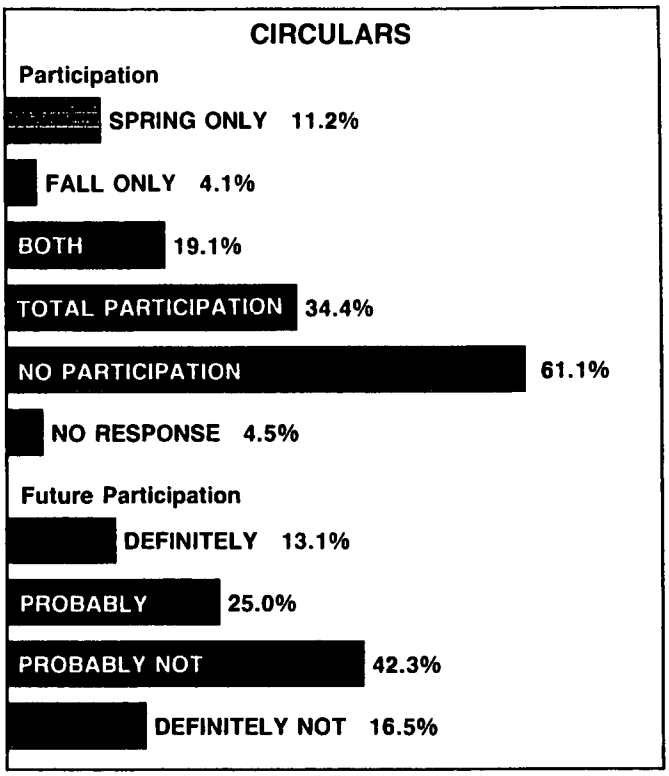
Yes	20.1%
and I intend to continue	11.4%
but I don't intend to continue	8.7%
No	77.6%
but I intend to use it	37.4%
and I don't intend to use it	40.2%
Net projected future use	48.8%

(2.3% no response)

Although Circulars were not viewed as well as some of the other marketing programs, they are being used effectively by many of the responding jobbers. Participation is as follows:

- Thirty-four point four percent are now using the Circular program.
- Thirty-eight point one percent of the jobbers who responded to the survey plan on using the Circular program in the future.
- Cost and lack of results were the two most commonly mentioned problems with the Circular program, as pointed out in chart J. Another area of the questionnaire concerned NAPA's import

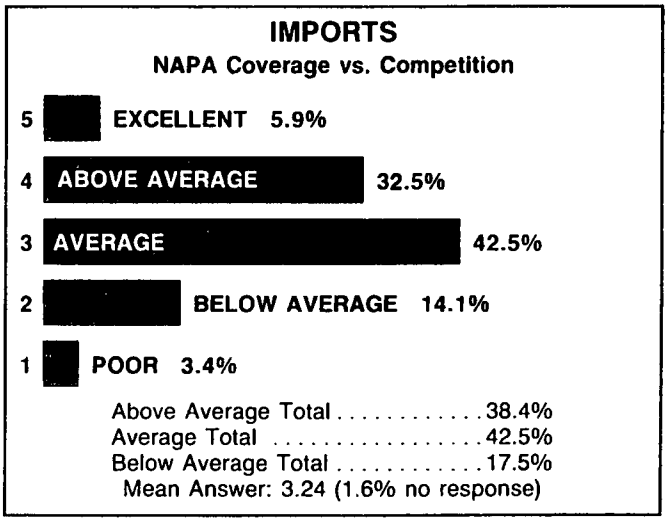
CHART J



parts coverage. Eighty point nine percent of the responding jobbers judged NAPA's coverage average or above average as compared to its competitors *(chart K).* The jobbers also had this to say about NAPA's import parts coverage:

- As indicated in chart L (page 16), jobbers feel that awareness of NAPA's imports parts coverage has an above average rating among consumers.
- Over 55% of the responding jobbers distribute the Imports Quick Reference Catalog to their customers. Over 60% of the responding jobbers plan to distribute the catalog in the near future as seen in chart M (page 16).

CHART K



- The NAPA Collector's Edition Signature Poster has been used to promote import parts coverage by 28.4% of the jobbers surveyed *(indicated in chart N, page 16).* Interest in using the poster is up, however, with 47% of the jobbers planning to utilize it.
- The "Parts for Imports/We've Got 'Em" sign is currently hang-

(continued on page 16)

CHART L

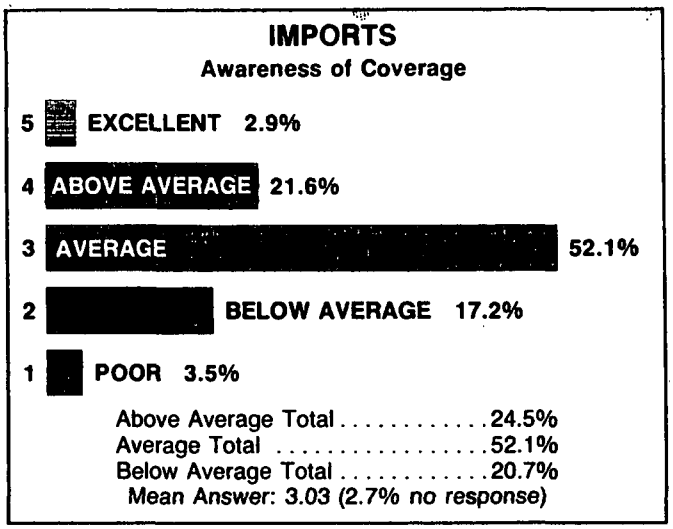


CHART M

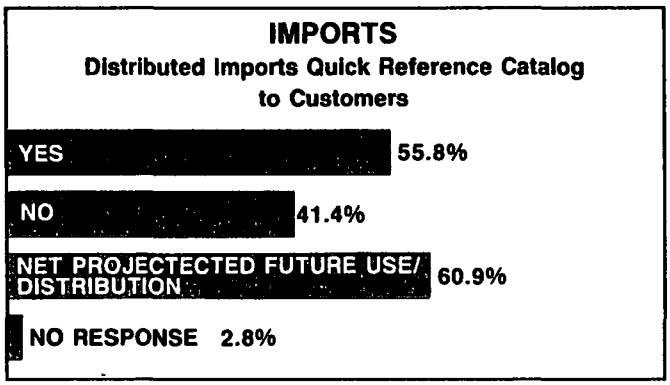


CHART N

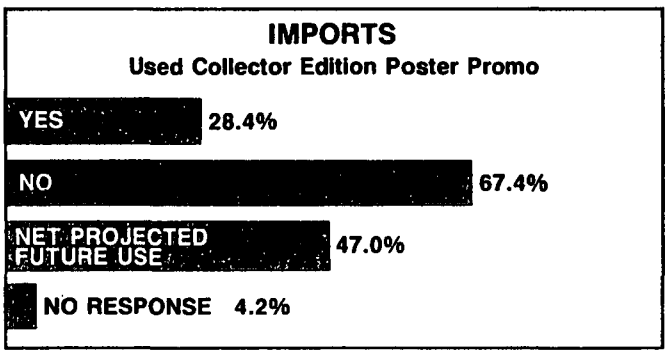
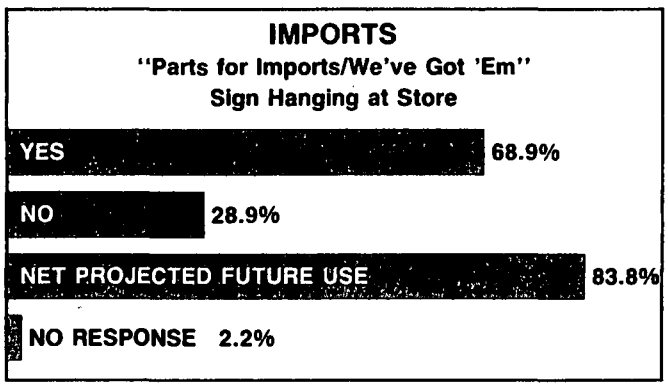


CHART O



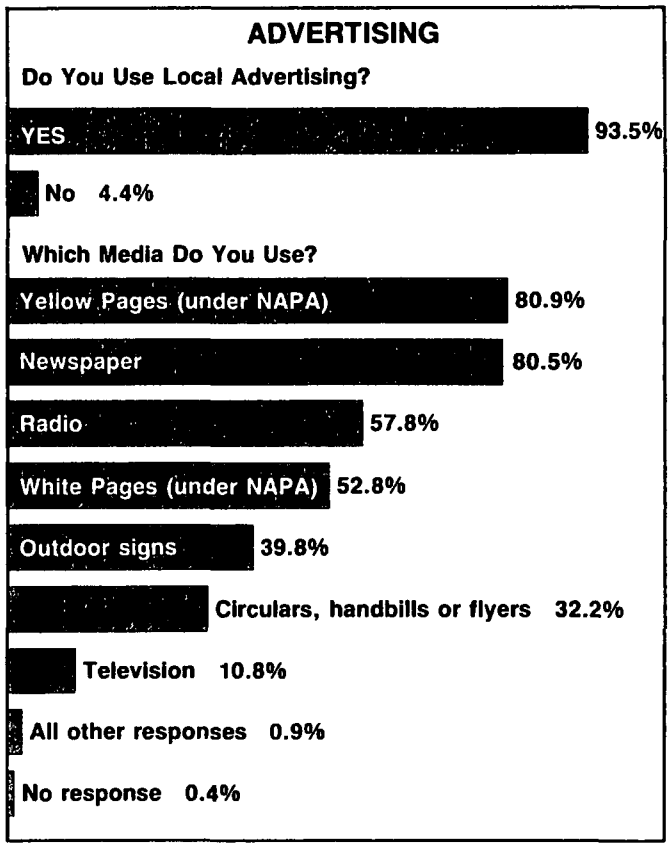
ing in the stores of 68.9% of the respondents and even more, 83.8% *(see chart O)*, are planning to continue or begin hanging the imports sign

The final question of the recent survey was, "If you were to make one suggestion on how the overall NAPA advertising program can help you improve sales, what would that suggestion be?"

- The largest percentage, 31.3%, had no suggestions for improvement.
- That percentage was followed by 28% who felt that more advertising — national, local, broadcast and print — needs to be done.
- Another 12.9% of the respondents were in favor of more price-related promotions.
- Many stated that they saw the need to improve NAPA's awareness and promote its strengths.

Currently, 80% of NAPA Jobbers spend up to 2% on advertising of some kind and 11% spend over 2% *(see chart P, below)*. But of all the jobbers surveyed 93.5% say they do some kind of local advertising. Of that local advertising, 80.9% use the Yellow Pages, 80.5% use their local newspapers and 57.8% utilize radio as their major sources.

CHART P



The results of the Jobber/Owner Survey will be used in the planning of future marketing programs. Combined with the input of the National Advertising and Marketing Council, the information gathered gave us great insight into our current marketing programs. But NAPA Headquarters doesn't intend to stop here. We will continue to gather information in a number of ways so that we will be able to provide NAPA Jobbers with the kind of programs best suited to their marketing and advertising needs.

GROUP HEALTH INSURANCE SHOULD DO MORE THAN JUST PAY YOUR MEDICAL BILLS

In truth, most group health insurance plans are pretty much the same. Coverage is provided for hospitalization, surgery, prescription charges, etc. The difference from one plan to another is usually the amount of the deductible and the co-insurance level.

With today's health insurance costs continuing to climb, you need and should expect a lot more from your group insurance program. You should also expect a lot more for your premium dollar.

NAPA's Group Medical Insurance Plans meet these challenges. We provide a choice of deductibles—$100 and $250—along with varying out-of-pocket limits. And, we offer the usual run of benefits that you would expect to find in a comprehensive insurance program. However, we go several steps further than most health insurance plans.

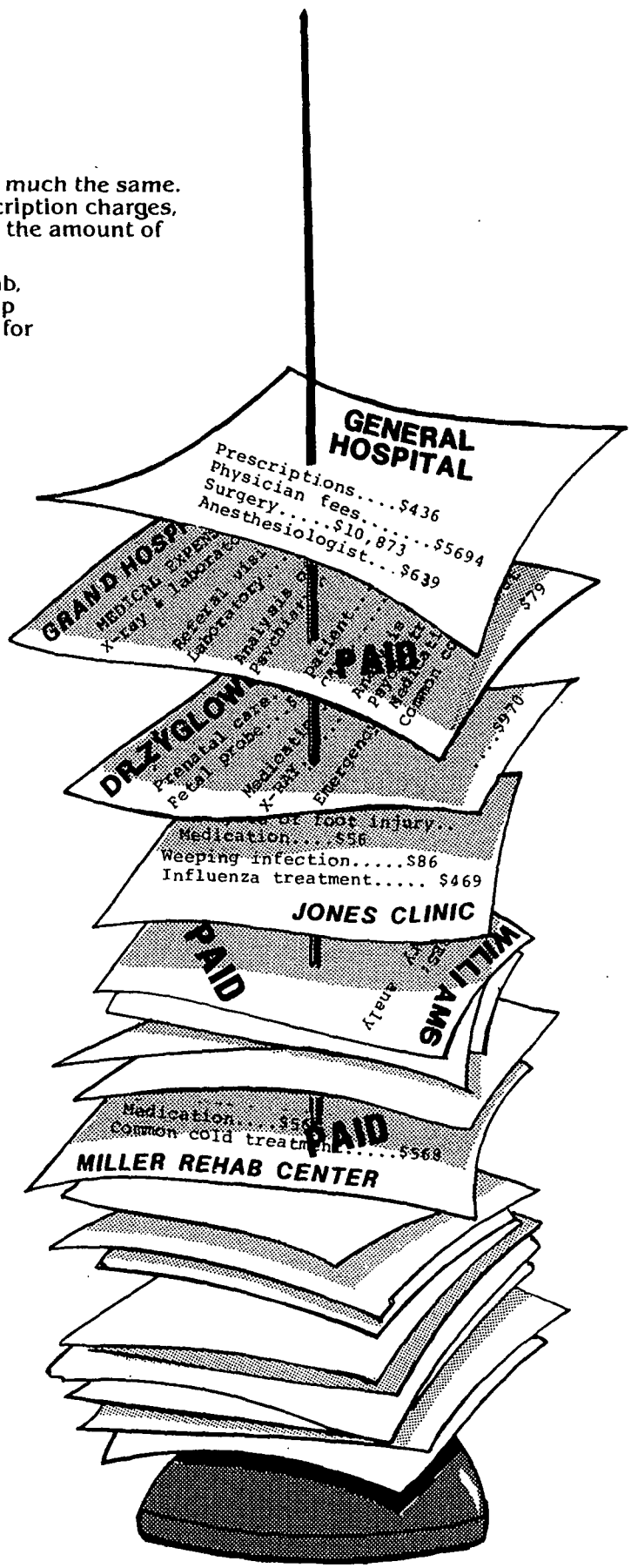
NAPA's Major Medical Insurance, underwritten by the John Hancock Mutual Life Insurance Company, is designed to provide you and your employees with the kind of benefits that reduce your out-of-pocket expenses and deliver more coverage.

Benefits such as:

- Pre-admission testing
- Second surgical opinion
- Ambulatory surgical care
- Hospice care

And a whole lot more. Find out more today about what this plan CAN DO to help you better control your health insurance costs. Call Bill Northey or Lou Franko TOLL-FREE at:

1-800-323-6898



NAPA Group Insurance Trust
947 N. Plum Grove Road
Schaumburg, IL 60195

Group Life, Executive Life, Unlimited Major Medical

NAPA DATELINE NAPA

VOLUME 4 NUMBER 3 ATLANTA, GEORGIA LIMITED EDITION



Mrs. Mamie Hyman celebrates her 90th birthday at Auto Supply in Morehead City, North Carolina. Pictured with Mrs. Hyman is her son T.C. Hyman who is carrying on the tradition of providing quality NAPA service.

Auto Supply Honors Mamie Hyman

Mrs. Mamie Hyman, former bookkeeper and partner at Auto Supply in Morehead City, NC (serviced by the High Point D.C.), was recently given a birthday celebration at the store.

Mrs. Hyman, who is 90 years young, still stops by Auto Supply every week to make sure her son, T.C. Hyman, and grandson are still giving the NAPA service that Morehead City residents have come to expect over the past 31 years.

ASE Fall Registration Reminder

Just a reminder to let your customers know that the deadline for the ASE (Automotive Service Excellence) Fall Test Registration deadline is October 4, 1985.

Let your customers know about this important date so that they too can take advantage of ASE certification.

NAPA Store Manager Sets Milestone

James Drake, manager of the NAPA Auto Parts store in Tucker, GA (serviced by the Atlanta D.C.), recently set a milestone in his career.

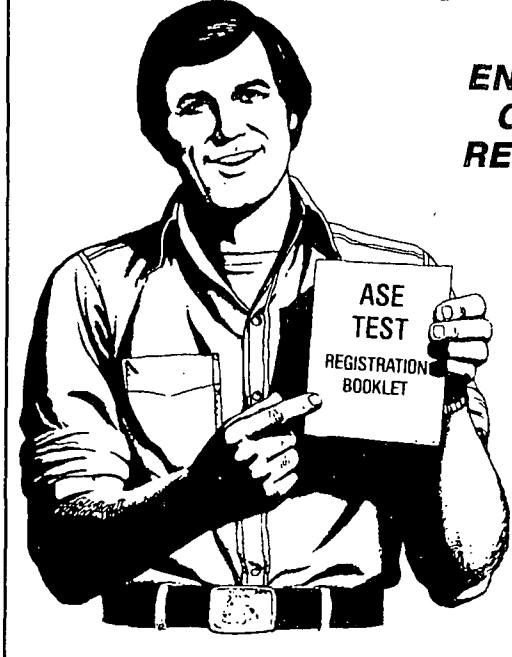
Mr. Drake has just completed 25 years of employment that includes no time missed due to illness or injury!

In fact, his record goes back almost 30 years if you include Mr. Drake's military service. Attributing his record of good health to the "help of the good Lord," Mr. Drake said, surprisingly, that as a child he was rather sickly until midway through high school.

Mr. Drake did not realize he was setting any kind of a milestone until his third year of employment when his supervisor challenged him to see how long he could go without taking sick leave.

That challenge has carried Mr. Drake for over 25 years as a member of the NAPA team. Having spent the last 11 years as manager of the Tucker store, Mr. Drake sees his role as a great challenge because you "learn something every day."

THE FUTURE WILL BELONG TO TECHNICIANS WHO CAN PROVE THEIR WORTH...



ENCOURAGE YOUR CUSTOMERS TO REGISTER FOR ASE TESTS TODAY!

ASE CERTIFIED

- AUTOMOBILE
- H-D TRUCK
- BODY/PAINT

DEADLINE IS— OCT. 4 '85

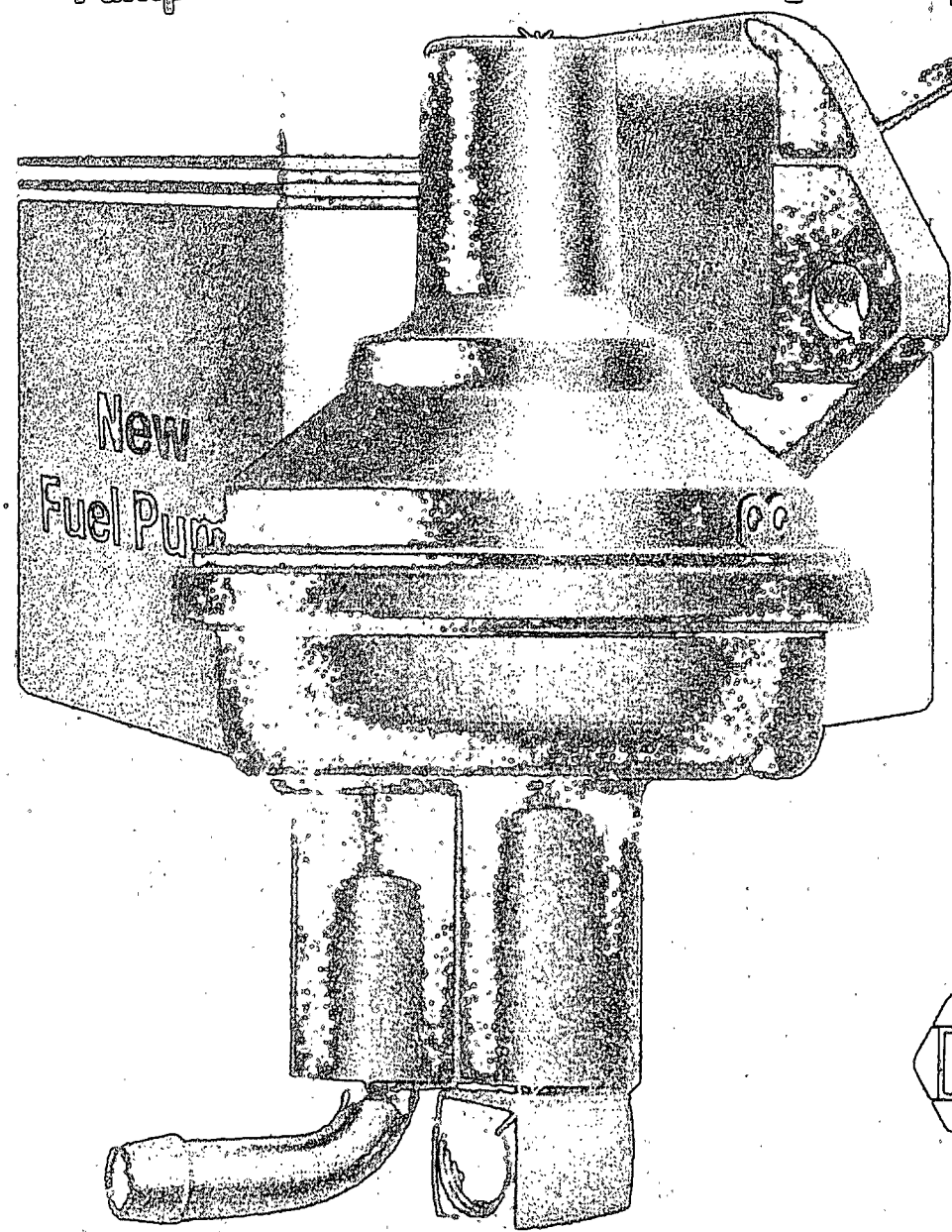
NAPA

Fuel Pumps

NAPA

Fuel Pumps

PUMP UP YOUR PROFITS.



When you want your fuel pump business to really take off, go with NAPA Pumps. They're like fuel for profits.

NAPA offers a complete line of mechanical and electrical fuel pumps for all types of cars and trucks.

And NAPA Pumps are built tough. Built to stand up to today's driving.

And they're quality checked to make sure they're up to our high standards of reliability. So you can sell NAPA Fuel Pumps with confidence.

When you want a full line of fuel pumps — built with quality — stock NAPA.

They can help expand your profit potential.

NAPA Fuel Pumps

When the name is NAPA, the standard is quality.

NAPA's got it.

All the U-joint numbers you need to handle the calls you get every day.

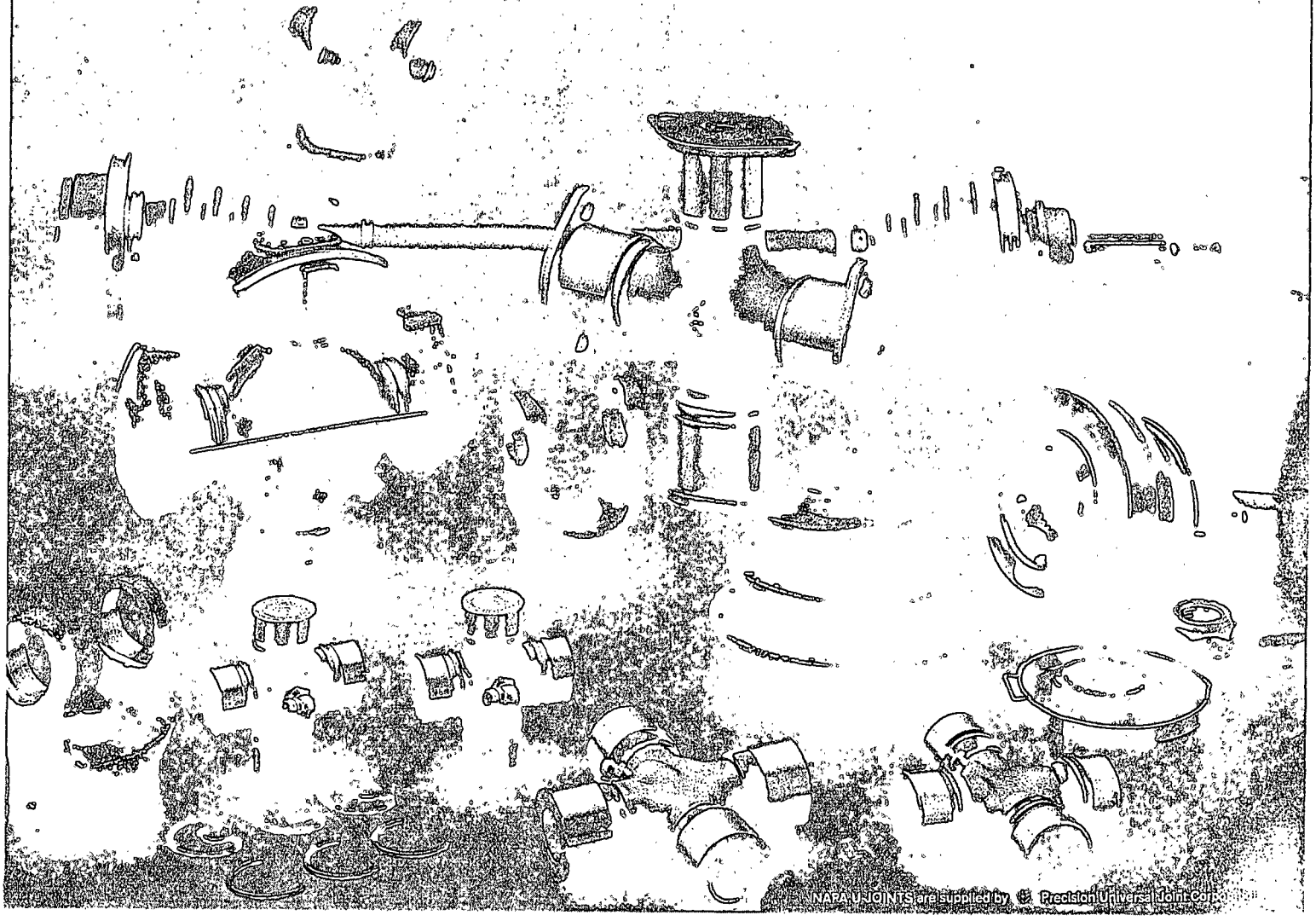
The most comprehensive U-joint program in the industry, as a matter of fact. Including NAPA numbers for most passenger car and truck U-joints. A NAPA line for construction and industrial equipment. A wide selection for agricultural and truck-mounted PTO's. Plus the industry's most comprehensive coverage on constant velocity—with NAPA original-equipment-type drive shafts, service kits and boot sets for all U.S. and import front-wheel-drive cars.

Nobody beats NAPA on quality, either. With high-strength steel crosses, case-hardened bearing cups, and machining that meets or actually exceeds O.E. standards.

Check us now for all the latest NAPA special promotional programs, catalogs, sales aids and more. Or ask your own direct NAPA U-JOINT factory representative—a professional ASE-certified specialist you can call on any time you want. Serving U is what we're all about.

NAPA U-JOINTS

U name it.



NAPA U-JOINTS are supplied by Precision Universal Joint Corp.