

Opportunities in Automotive Aftermarket

Presented at
CLEPA 2025
AFTERMARKET CONFERENCE

3rd April, 2025



BRIEFING AGENDA



**DISRUPTIVE TRENDS
IMPACTING THE
AFTERMARKET**



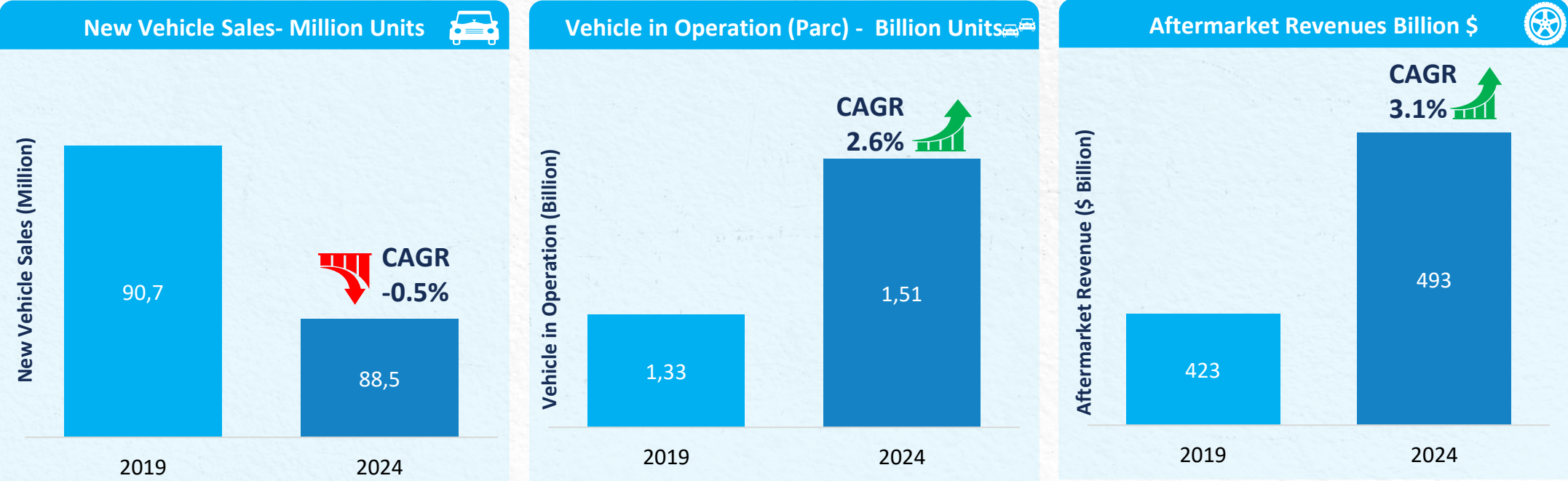
**DEEP-DIVE INTO
SELECTIVE TRENDS**



**STRATEGIC CONCLUSIONS
AND GROWTH
OPPORTUNITIES**

Global Automotive Aftermarket 2019 vs. 2024

Automotive Aftermarket: Key Numbers, Global, 2019 vs. 2024



Source: Frost & Sullivan. Aftermarket revenues include parts and accessories and exclude services. Revenues are measured at the manufacturer level.
Prominent parts include tyres, batteries, brake parts, filters, collision body parts, starters/alternators, lighting, exhaust components, spark plugs, lubricants, and others

Focus on Aftersales

VEHICLES ARE CHANGING...



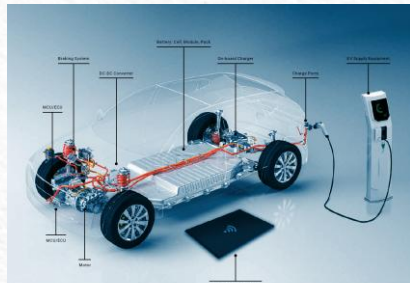
AGEING VEHICLES



LONGER SERVICE INTERVALS



**MOBILITY OPTIONS
DECREASING MILEAGES**



**ALTERNATIVE
POWERTRAIN VEHICLES**



**CONNECTED &
AUTONOMOUS VEHICLES**



**SERVICE COMPLEXITY
TECHNICIAN SKILL GAP**

SO ARE CUSTOMER EXPECTATIONS IN OWNERSHIP



Personalised Experience



Digital Expectations

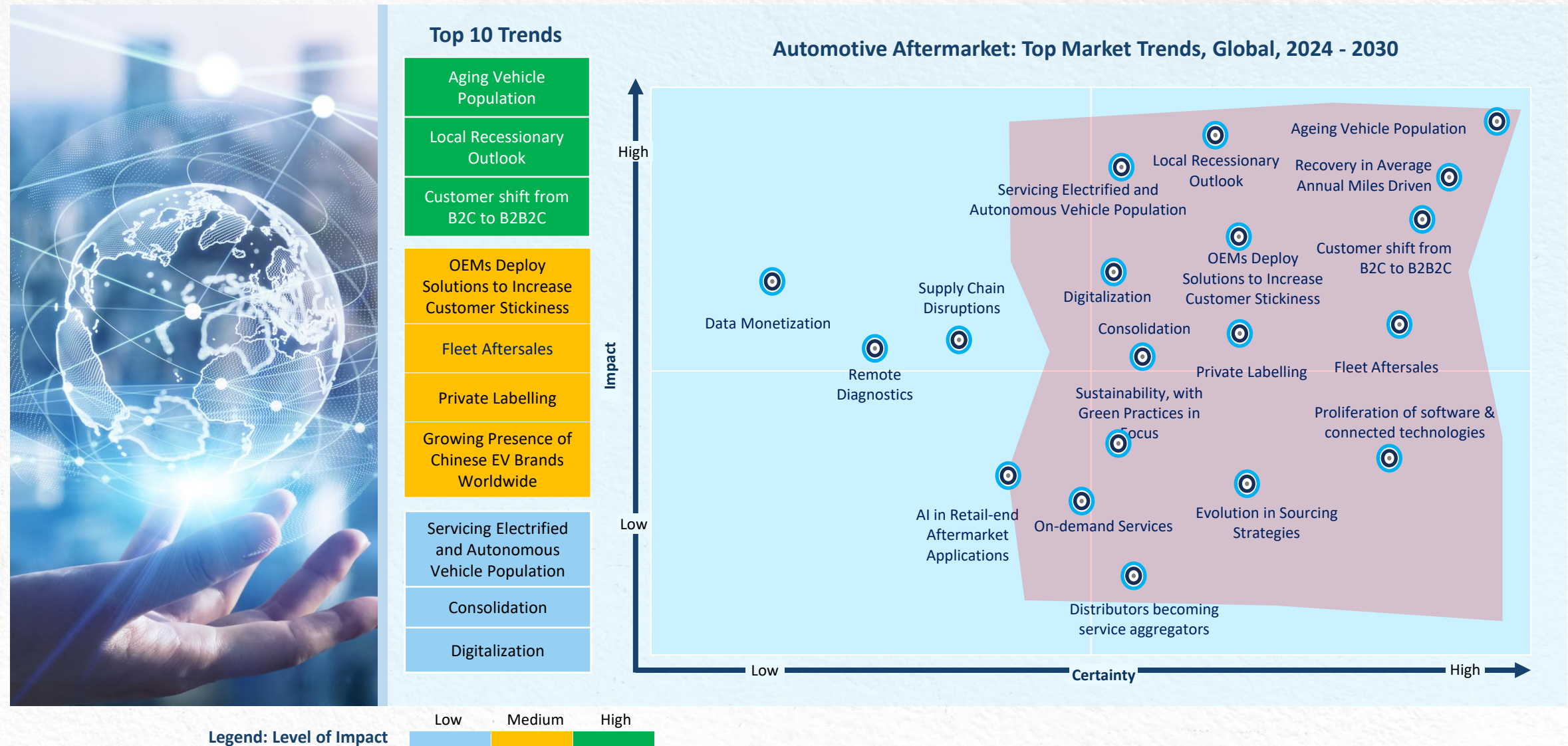


Options beyond Ownership



Evolution of B2B2C Channel

Key Trends in the Global Automotive Aftermarket



OEM's are also Expanding into Independent Workshop Services (IWS)



Dedicated Brands and Businesses targeting Independent Aftermarket



Digital Retail & Omni-channel Strategy

OTA based services



M&M – service aggregation via (Carworkz, NEMO – “Next-Generation Mobility”)

Maintenance Offerings

Express RSA



Lifetime free RSA



Financial Contracts & Credit Services

0% interest on financial contracts



Commercial Account Services & Used Car Programs



Value Line Offerings



Loyalty Programs & Subscription Services

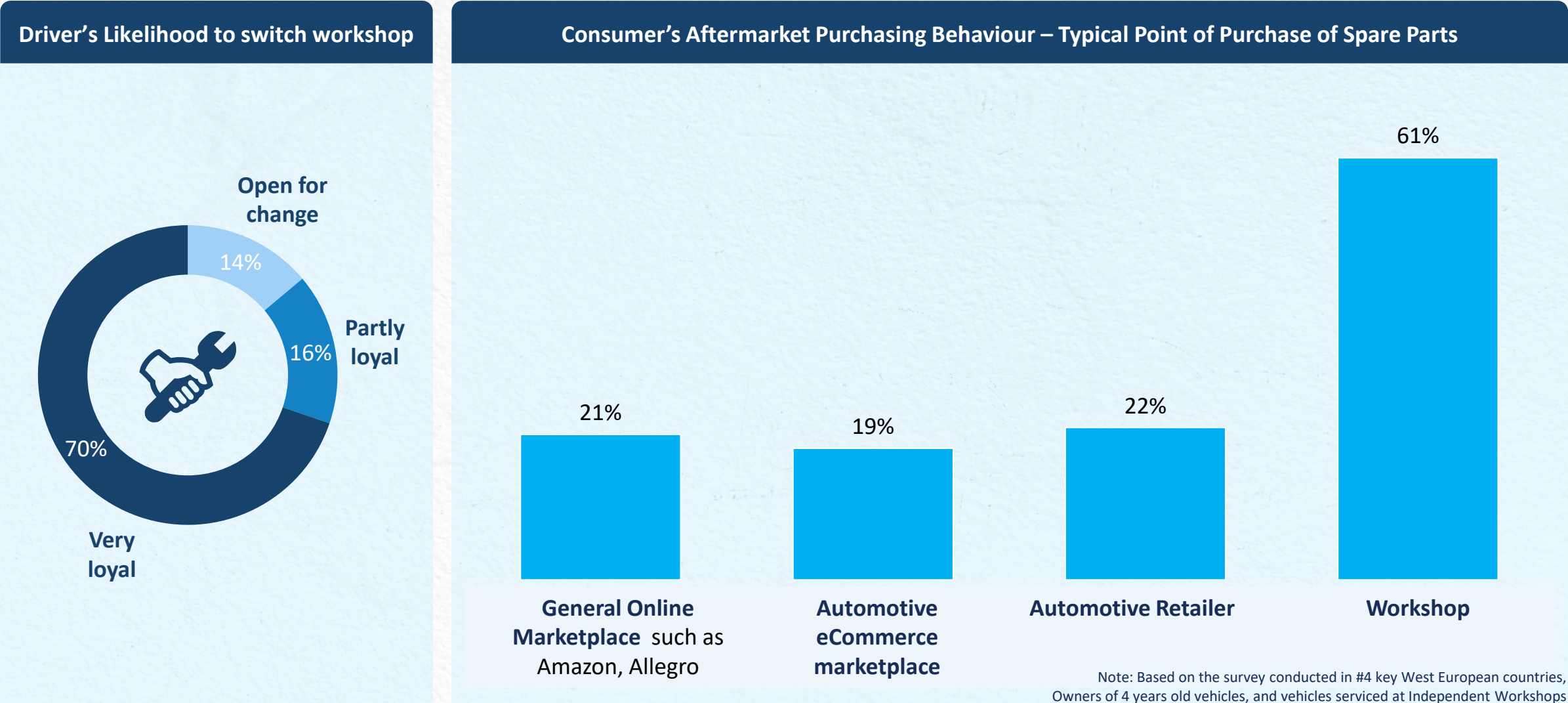


M&M – service aggregation via (Carworkz, NEMO – “Next-Generation Mobility”)

Connected. Autonomous. Shared. Electric. (CASE)



Drivers Exhibit Strong Loyalty to Workshops, with the Majority Sourcing Spare Parts Primarily through Workshops



Challenges Faced by Independent Workshops (IWS)

Current Challenges faced by the IWS



Labour Shortage

Lack of Training

Ability to Attract new Customers

Lack of Parts Catalogue

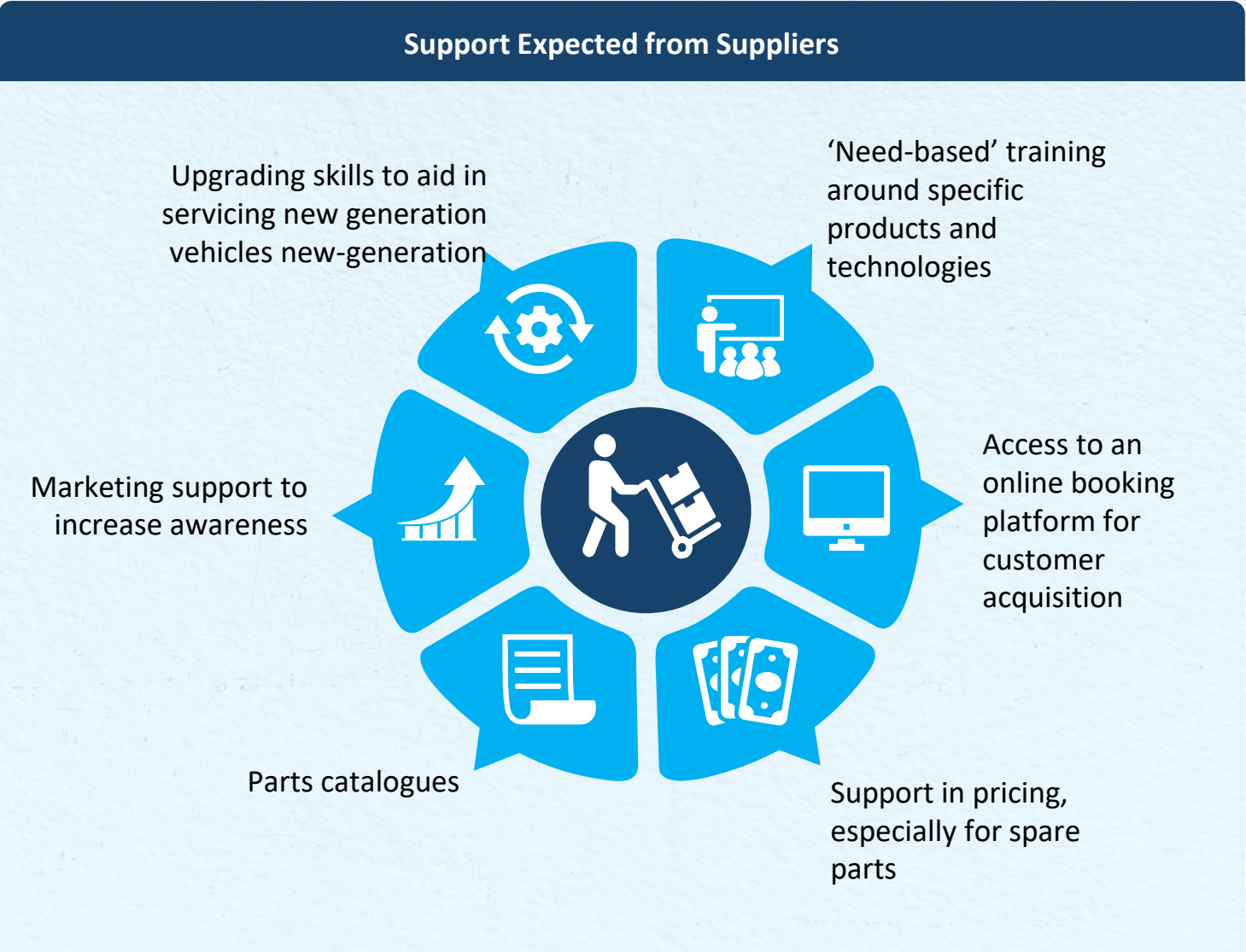

Certification of Mechanics

Stocking of spare parts

Working Capital

Space

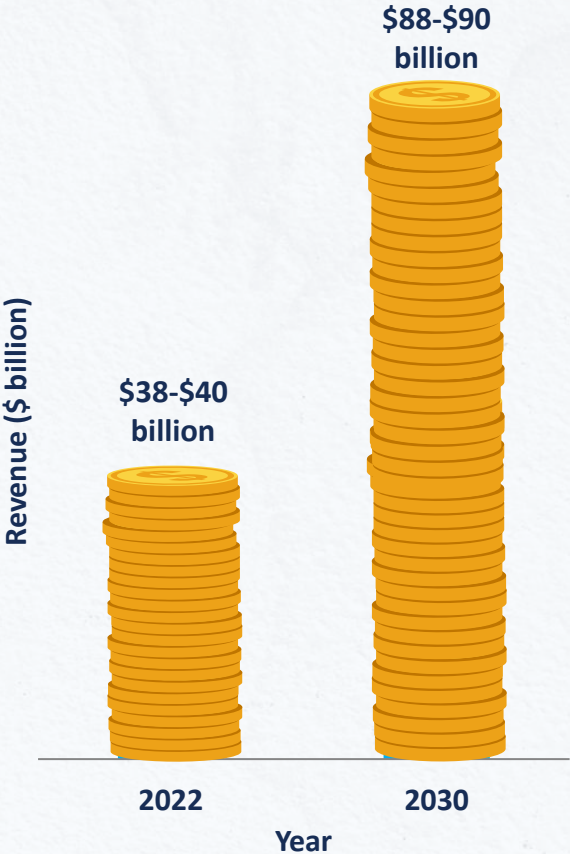
Support Expected from Suppliers



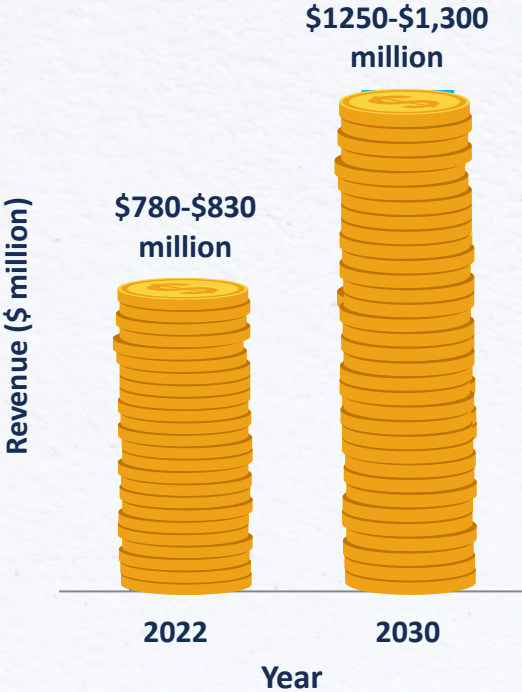
The diagram features a central dark blue circle with a white icon of a person pushing a shopping cart. Surrounding this central circle are eight blue, petal-shaped segments, each containing a white icon and a text label. The segments are arranged in a circular pattern. The labels are: 'Upgrading skills to aid in servicing new generation vehicles new-generation' (top-left), '‘Need-based’ training around specific products and technologies' (top-right), 'Access to an online booking platform for customer acquisition' (right), 'Support in pricing, especially for spare parts' (bottom-right), 'Parts catalogues' (bottom-left), 'Marketing support to increase awareness' (left), 'Ability to Attract new Customers' (top-left), and 'Labour Shortage' (top-right).

O2O Integration as a Catalyst for a Broader Digital Channel Adoption

Factors Driving Digitization of Parts and Service Ordering



Online Sales of Replacement Parts and Accessories, Global, 2022-2030



On-Demand Services Revenue from Online Marketplaces, Global 2022-2030

HIGH

Expansion in the Serviceable Addressable Market for Electric and Autonomous Vehicles



Autonomous Vehicles



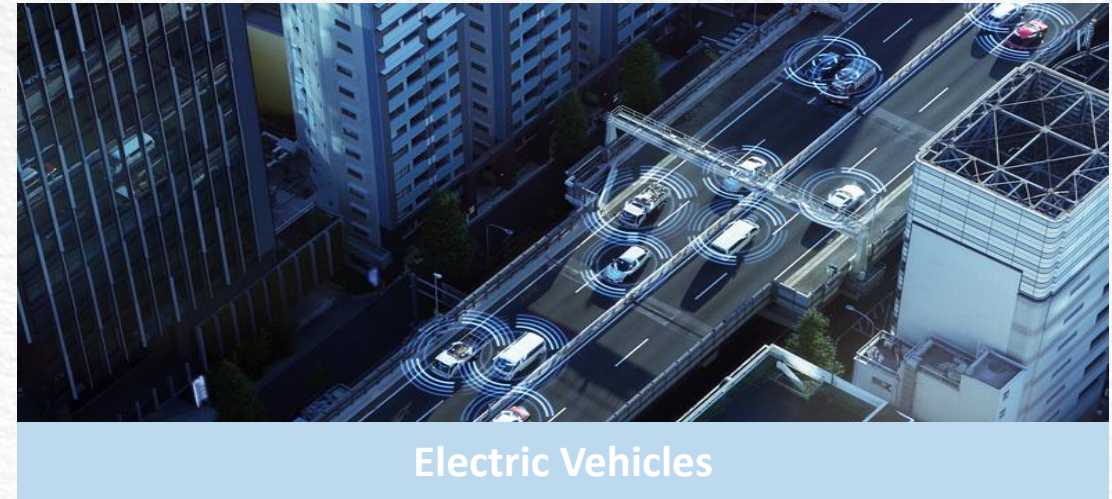
30-40%

of vehicle parc globally to have ADAS/Autonomous capabilities by 2030



Up to **15%-20%**

reduction in collision repair business by 2030

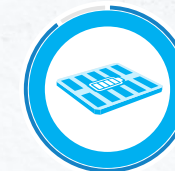


Electric Vehicles



190-200 mn

EVs in global car parc by 2030



~90%

reduction in number of moving parts; opportunity from electronics, e-components and EV specific services- batteries

HIGH
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ACTASYS

AVILOO
BATTERY DIAGNOSTICS

plus.ai

TWAICE

PETROMIN



MINIEYE

CATL

ZongMu
安全驾驶 | 智慧生活

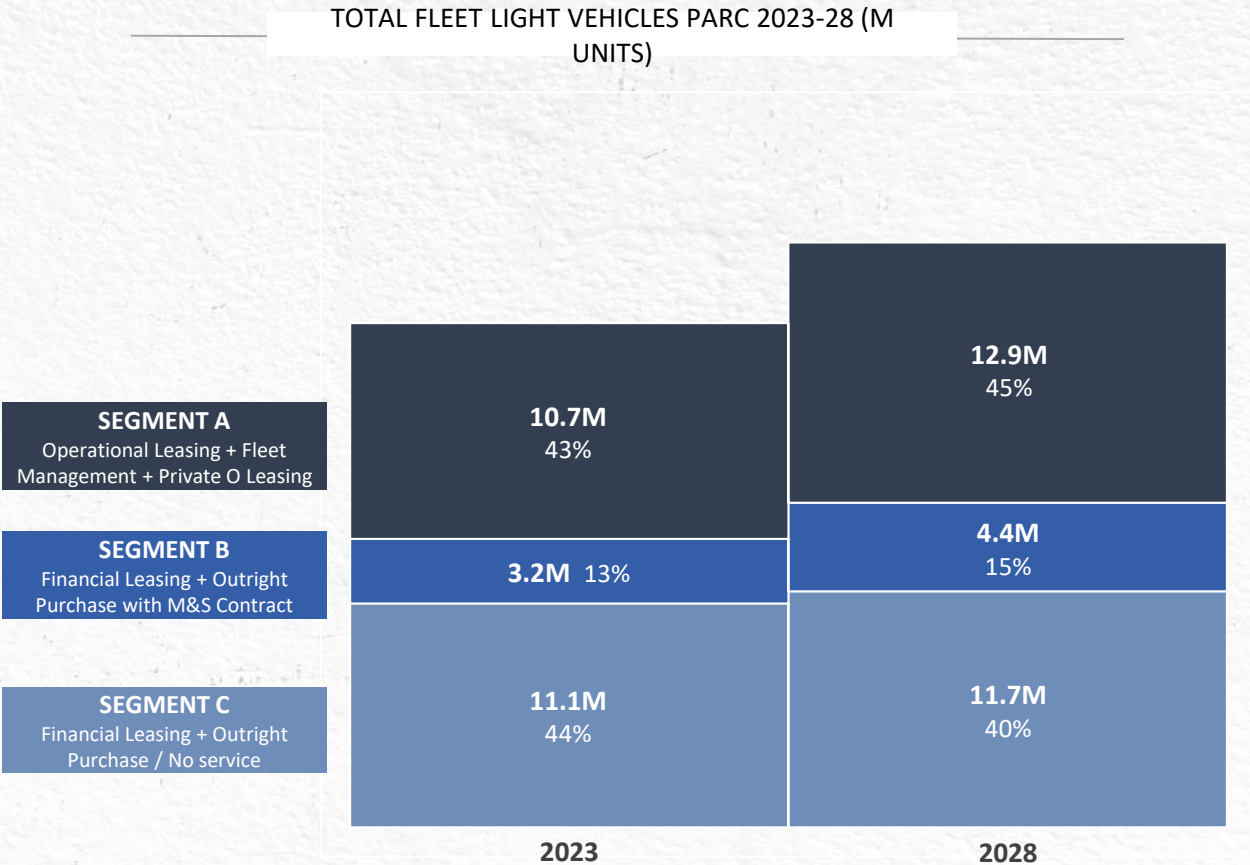
Fleet Aftermarket Segment Split and Number of Vehicles – EU Level



The fleet car parc is expected to continue its growth, being impacted further by corporate vehicle financing solutions adapted for the retail segment (e.g. private operational leasing).

Numerous fleets in Europe (approximately 40%) are using outright purchases and still want to be entirely in control of their vehicle fleet management.

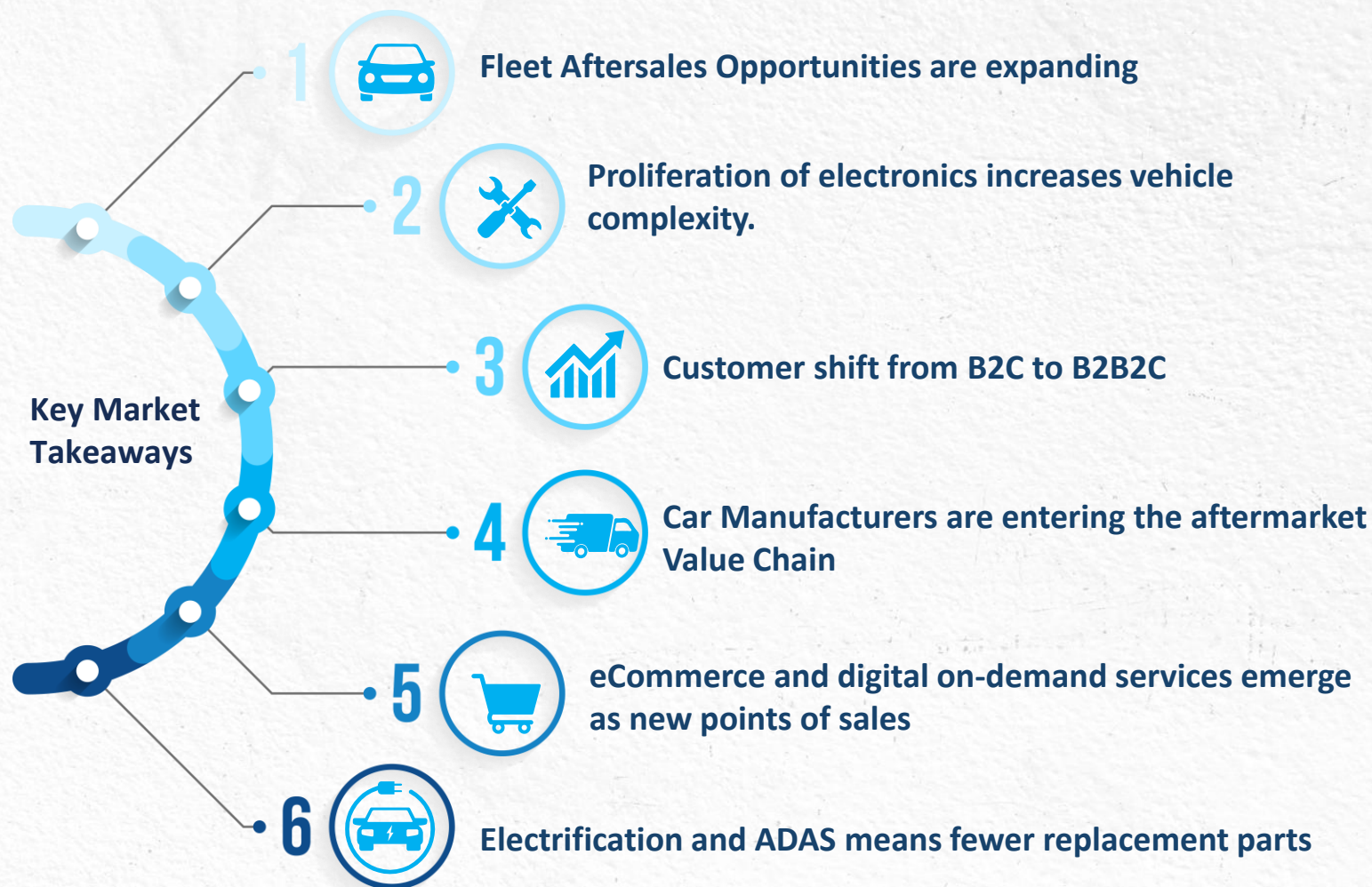
At the same time, leasing solutions showcase the most significant growth potential as more fleets understand the benefit of externalising their fleet management activities.



Europe – UK, DE, FR, IT, ES & PL

Source: Frost & Sullivan.

Top Takeaways from Today's Presentation on Aftermarket Market Trends



Opportunities will be developed

Launch differentiated service packages targeting segment 2 and 3 customers.

Establish collaboration with leading workshop/ garage chains to increase exposure to IWS.

Define targeted value position for Fleet Customers to cope with increasing sector complexity.

Explore new EV and ADAS service opportunities.

Embrace B2B2C eCommerce or digital channels.

Contact Us

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