Shifting Gears: eCommerce in the European Automotive Aftermarket

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At a glance

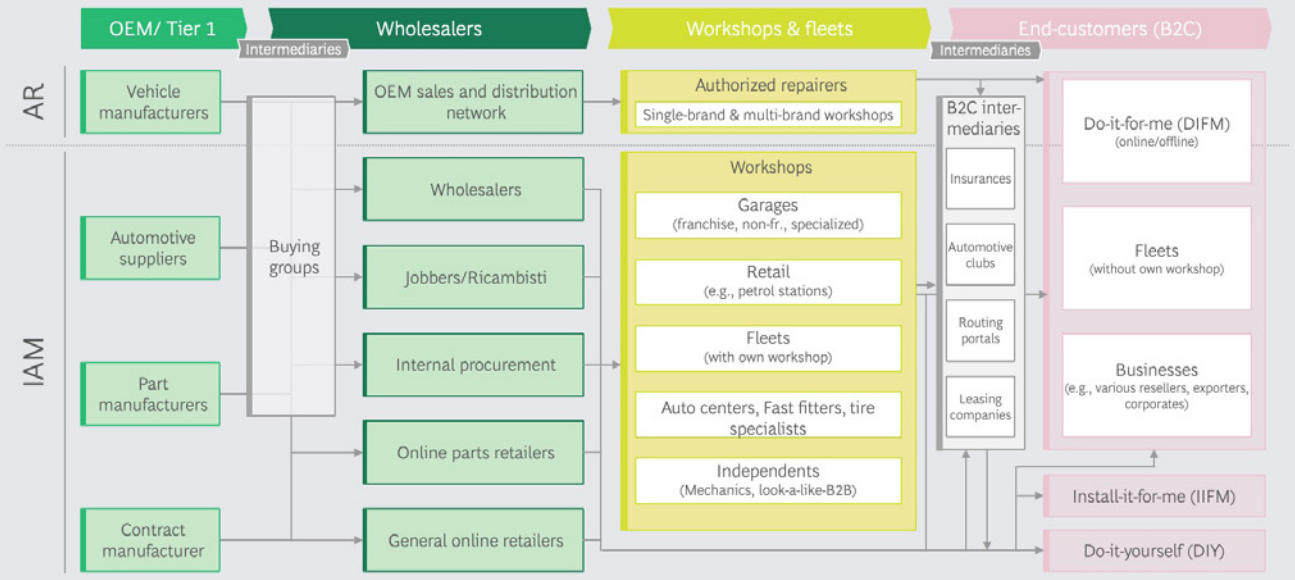
The European automotive aftermarket is supported by a large vehicle parc and demonstrates strong resilience to short-term fluctuations. However, digitalization is rapidly transforming industry dynamics. Traditional purchasing methods are being replaced by eCommerce and digital platforms—a trend that is set to continue, fundamentally reshaping how workshops and consumers procure aftermarket products.

Online channels with transparent pricing are drawing a growing number of B2B and B2C customers. Simultaneously, an aging vehicle parc is driving demand among DIY customers for affordable, quality parts, a need that independent channels are increasingly fulfilling. Online parts retailers such as AUTODOC, Kfz-teile24, and Oscaro, alongside established general online retailers like Amazon and eBay, are disrupting traditional business models by offering lower prices and simultaneously addressing various stages of the value chain. While this shift often results in longer delivery times compared to conventional wholesale models, both workshops and end customers are adapting their purchasing behavior accordingly.

To assess these developments, this study draws on insights from more than 40 independent experts and approximately 50 secondary sources and industry reports. As the market evolves, businesses must embrace digitalization and adapt to shifting customer expectations to maintain their competitive edge.

The market environment: Authorized and independent aftermarket

Exhibit 1 | Market overview



Source: BCG analysis

The automotive aftermarket functions through two main channels: authorized repairers (AR) and the independent aftermarket (IAM). This study focuses on the IAM, which serves three distinct types of end customers—Do-it-for-me (DIFM), Install-it-for-me (IIFM), and Do-it-yourself (DIY). Each group has specific purchasing and service channels. DIFM customers, along with businesses and fleets without in-house workshops, typically purchase both parts and services through local workshops. DIY customers, by contrast, buy parts from online platforms or retail stores and handle installation themselves. IIFM customers buy parts online or through retailers but depend on local workshops for installation services.

In the IAM, a diverse set of players cater to end customers, including workshops and retailers. These include franchised, non-franchised, and specialized garages, as well as auto centers, fast fitters, and tire specialists. The group further encompasses retailers, such as petrol stations, and independents, mechanics who are trained and largely operate without affiliation to a specific workshop.

At the core of the IAM value chain are wholesalers, which purchase parts from suppliers of parts and physically deliver parts to both retailers and directly to workshops. Retailers include both physical brick-and-mortar and online parts retailers (such as AUTODOC, Kfzteile24 and Oscaro), which in turn resell parts to customers (normally DIY and IIFM). In some markets wholesalers will also sell parts to small specialty distributors known as jobbers, which specialize in servicing local garages with frequent deliveries driven by the often-immediate demands of workshops. In many markets, where they have sufficient density of their own local (smaller) distribution hubs, wholesalers will make the frequent deliveries to workshops themselves. Demand for parts by workshops is sometimes met by both physical stores (rarely as it requires a mechanic to travel to the store) and online parts retailers (when immediate parts fulfillment is not required). Wholesalers source their parts from a range of suppliers, including vehicle OEMs, Tier 1 suppliers that provide parts to OEMs, aftermarket parts suppliers that are dedicated to producing parts only for the aftermarket, and contract manufacturers that produce private-label parts for retailers and other channels.

12 trends will transform the aftermarket until 2035.

The European aftermarket is evolving across four key areas:

A Macroeconomics & Regulation: The vehicle fleet is aging and growing slowly, while regulations continue to support independent repair access and sustainability gains importance.

B Technology & Electric Vehicles: The rise of BEVs reduces frequency of maintenance needs but increases complexity and adds new components, while ADAS lowers accident-related repairs while boosting demand for sensors.

C Customer Behavior & Ownership: DIY repairs remain popular, fleet operators gain influence, and insurers steer repairs through digital platforms.

D Value Chain & Business Models: eCommerce and private-label parts are expanding, while OEMs push deeper into the independent aftermarket.

A. Macroeconomics and regulation

Trend 1: Car parc is continuously growing and aging

Europe's car parc grows slowly and is aging, with average vehicle age exceeding 12 years by 2035, which results in shifting consumption patterns for IAM and AR.

Older vehicles are strengthening the independent aftermarket (IAM) in the long run. Vehicles aged 4–8 years have the highest per-vehicle spend across both IAM and AR while those 16 years and older contribute roughly half of that amount. However, spending distribution between IAM and AR varies significantly. In the IAM, the highest spend per vehicle can be observed in the 12–16-year age group, with vehicles older than 16 still in a similar range. In the AR, however, the spend per vehicle is highest for cars aged 0-4 years. As a result, aging drives overall spending in the IAM, where cars older than 12 years account for more than 50% of total spend.

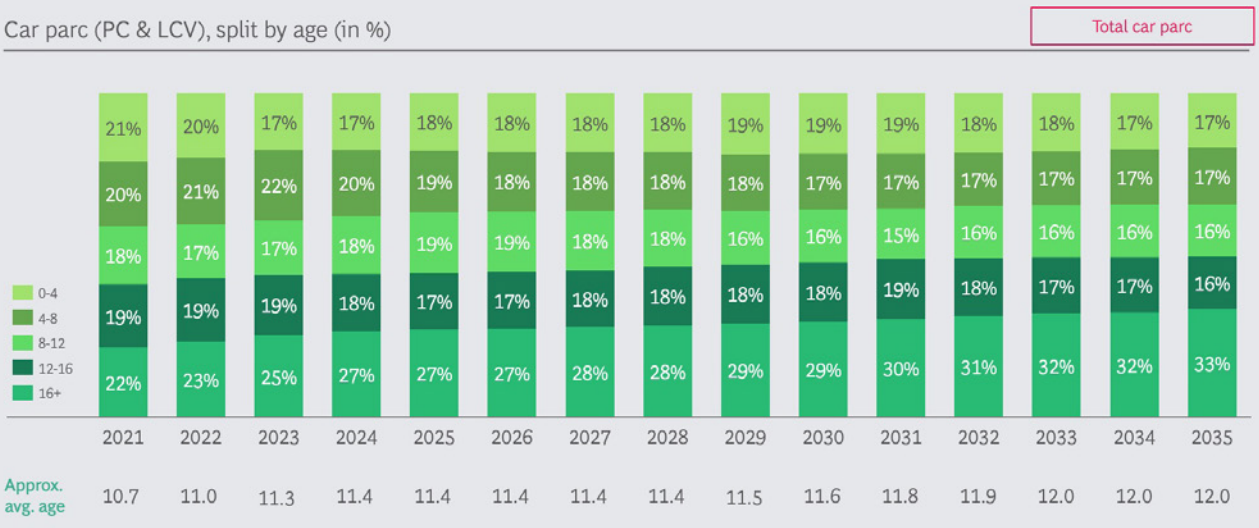
Trend 2: Regulation continues to ensure right to repair

Ongoing regulatory developments like MVBER (Motor Vehicle Block Exemption Regulation) are strengthening consumers' right to repair, increasing independent aftermarket access to vehicle data and parts. However, cybersecurity regulation will impact repair-accessibility of newer vehicles in the context of connectivity and autonomy. At the same time, recycling regulation, as well as battery regulation, increase the relevance of the "used" market and provide incentives for remanufactured parts.

Trend 3: Sustainability is gaining in relevance

Environmental concerns and stricter emissions regulations are pushing the aftermarket toward sustainable solutions. On the regulatory side, emissions regulations, circularity requirements and ESG reporting drive focus on sustainability. At the same time consumer behavior creates a softer set of incentives, resulting in a high concern for environmental challenges among aftermarket players.

Exhibit 3 | Average age of car parc to increase steadily, COVID impact to be seen in young vehicle share in the next few years



Note: Includes Germany, France, Italy, Spain, UK, Portugal, Poland, Netherlands, Belgium, Denmark, Sweden, Finland, Norway, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Romania, Slovakia, Slovenia, Austria, Switzerland, Greece, Ireland, Luxembourg
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

B. Technology and electric vehicles

Trend 4: BEVs need less maintenance, but penetrate car parc slowly; new parts & hybrids compensate

New annual battery electric vehicles (BEV) sales are set to rise to 90% by 2035, increasing penetration of BEVs in the car parc to around ~10% by 2030 and ~25% by 2035, which is impacting aftermarket spend.

BEVs incur approximately 50% lower spending on repairs and maintenance parts compared to internal combustion engine (ICE) vehicles. This reduction is partially offset by increased tire and suspension usage, driven by the higher weight of BEVs, as well as the need for additional BEV-specific components (e.g., high-voltage components or thermal management)

The overall adoption of BEVs is heavily dependent on government regulations & policy, promoting BEV- or restricting ICE-sales. Modification or lifting of such existing regulations may delay the adoption of BEVs and thereby further delay any impact on the aftermarket.

In the early years, the higher cost and complexity of new BEV parts will help offset the reduction in overall aftermarket spending. As a result, parts spend for BEVs in the IAM and AR will be constant in early years, but 13% lower, when excluding new BEV parts. However, as these prices normalize over time, this compensatory effect will diminish. In contrast, hybrid electric vehicles (HEVs)—which are expected to represent a significant share of sales over the next decade—will generate higher spending on maintenance parts. (Exhibit 4)

Despite these shifts, the overall impact on the aftermarket will be gradual due to the age distribution of the vehicle parc. Battery electric vehicles (BEVs) will account for less than 2% of vehicles aged eight years or older in 2030 and less than 10% in 2035, meaning their effect on aftermarket spending will be diluted. This is particularly relevant for the IAM, which primarily services older vehicles and will therefore continue to see demand driven by traditional ICE and hybrid models for the foreseeable future.

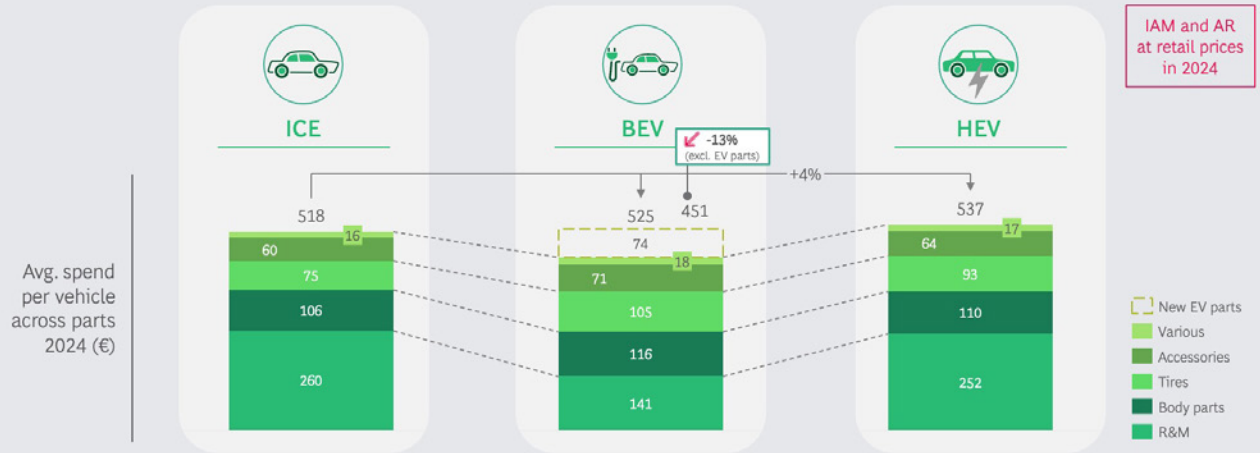
Trend 5: Rising part complexity drives up parts and repair prices

Modern vehicles are becoming more complex, with advanced driver-assistance systems (ADAS) and electrification leading to higher part costs and more specialized repair requirements. For example, the price of headlights has increased by 9% to 10% annually over the past four vehicle generations. As a result, we expect sensors, lighting and other electric parts to continue along this trend with an above inflation price increase until 2035.

Trend 6: ADAS requires more sensors and reduces collision rate

Advanced safety technologies are reducing accident rates, impacting demand for collision repair while increasing the need for calibration and sensor replacements. A relatively high degree of ADAS penetration of ~45% for Level 2 and above in 2035 leads to a reduction of collision rates by 1-2% per annum. At the same time, the cost for crash repairs increases, driven by expensive lidar and camera parts.

Exhibit 4 | BEV with 90% of original ICE spend across all parts, lower repair & maintenance spend is offset by additional parts



Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

C. Customer behavior and ownership

Trend 7: DIY trend continues for key parts and consumers

By 2035, the DIY share will grow to 15% of total IAM sales, driven by rising costs, inflation, and increased price transparency in eCommerce, which encourage DIYers to purchase auto parts directly and save on service cost.

This effect is strongly driven by specific parts segments, where consumers are able to install independently. As such accessories (e.g., windshield wipers) and easy-to-install parts (e.g., filters) exhibit the largest share of DIY. Parts that require complex tools (e.g., tires) or deep expertise (e.g., clutches) remain with a lower DIY share. This effect is strongly supported by the expansion of digital learning tools and online videos that encourage more motorists to undertake DIY repairs. Additionally, new parts entering the market are capturing volumes previously traded in the 'grey' used sector, further strengthening the segment. However, increasing vehicle complexity, a younger generation with lower DIY engagement, and stricter warranty requirements that limit non-professional repairs are creating significant barriers to an even broader DIY adoption.

Trend 8: Fleets are growing and have specific aftermarket needs

Ride-sharing, last-mile delivery, and corporate fleets gain shares of vehicle ownership, reaching ~20% of the total vehicle parc by 2035. This results in changing customer needs: Higher focus on efficient maintenance programs, bulk part procurement, and predictive servicing solutions. While this drives down vehicle ages, fleets pose an opportunity for tailored offerings in the aftermarket.

Trend 9: Insurers and intermediaries gain influence and steer repairs

Insurance companies and fleet service providers are playing a greater role in repair decisions, leveraging partnerships with workshops and influencing aftermarket purchasing trends. For insurance companies, pre-negotiated agreements provide greater control over repair costs and a consistent service offering. IAM workshops can use these contracts to their benefit by attracting additional customers and balancing peaks and troughs in their demand.

D. Value chain and business model

Trend 10: Business model innovations in eCommerce gain importance

In the €20B (2024) B2C market, representing ~20% of the IAM, online sales are increasing from ~32% today to reach nearly 70% penetration by 2030, growing at ~15% CAGR in 2025 to 2030 and a ~6% CAGR for 2030 to 2035.

While eCommerce has surpassed 50% market penetration in industries like consumer electronics and books, the auto parts sector (at ~32% penetration for B2C), like household goods and furniture, remains far from saturation. Over the past ~7 years, online channels have grown rapidly, driven in part by the COVID pandemic, and continue to offer strong growth potential. Advances in fitment accuracy, convenience, and price transparency are helping auto parts catch up with broader eCommerce trends, making online purchasing an increasingly viable option for both businesses and consumers. This trend is differentiated across parts categories, while easy to replace and fit parts, such as oil, windshield wipers and accessories are already mostly ordered online, more complex parts such as clutches often are still routed through offline channels.

Trend 11: OEMs push into IAM market and segments 2&3

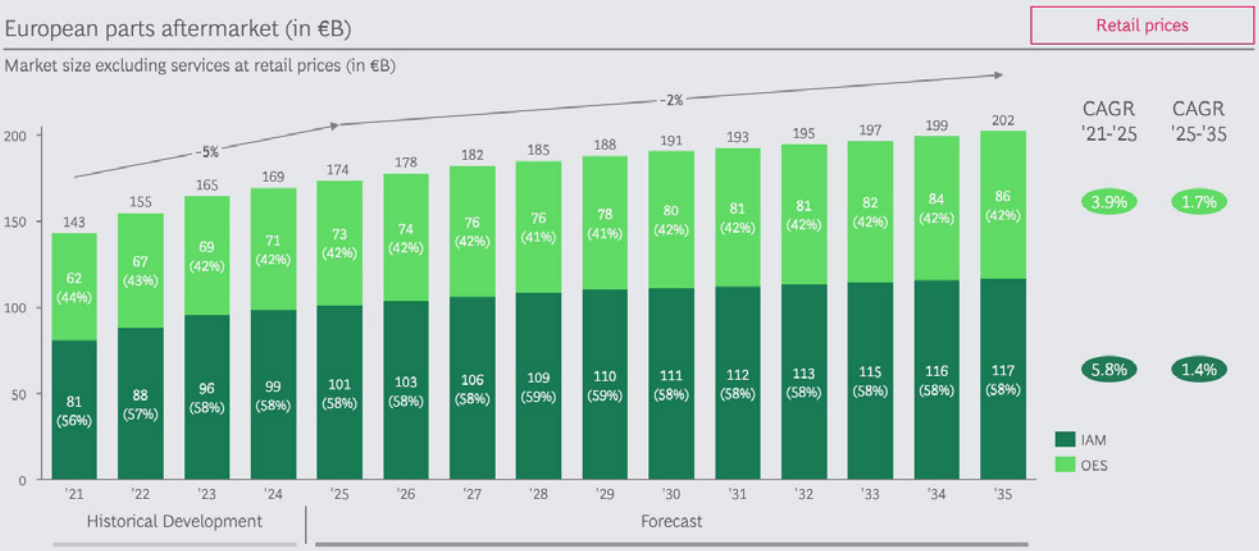
Automakers are increasingly expanding into the independent aftermarket, seeking to gain a greater share of the lifetime value of the vehicles they have sold. They do so by taking advantage of the growing vehicle technology and complexity to drive consumers through authorized (and certified) repair networks (largely their dealers' network). In addition to this, they also leverage telematics built into new cars to improve CRM capabilities (their own and their dealers') and to improve diagnostics (including predictive diagnostics). Accordingly, they are also pushing further into vehicle segments older than 4 or 8 years (segments 2&3).

Trend 12: Private labels & value-lines continue to grow

Private-label parts and value-lines provide cost-effective alternatives without compromising quality, reaching a 20-30% penetration across IAM and creating new growth opportunities for wholesalers. This effect is driven most strongly by accessories and consumables with a projected private label share of ~50% this year and maintenance parts, which will see a private label penetration of 30-40%. On the flipside, motor & drivetrain components as well as body parts see a much lower private label share of less than 10%.

The European aftermarket shows resilience and reaches a volume of €202B in 2035

Exhibit 5 | Core aftermarket growth continues to reach €202B in 2035, but slows down due to car parc and lower spend in growing BEV segment



Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

The independent aftermarket (IAM) is projected to grow to approximately €117 billion within a total aftermarket value of €202 billion. However, overall aftermarket growth is expected to slow after 2025 due to slower growth in the car parc and effects from the EV transition.

The authorized repairers (AR) channel will experience steady growth at a compound annual growth rate (CAGR) of 1.7% from 2025 to 2035. This growth is driven by strong ties between manufacturers, restraints embedded through software and demand for specialized components such as body parts, electrical systems, and BEV-related components. Meanwhile, the IAM will continue to expand but at a slightly slower pace (CAGR of 1.4%) over the same period. (see Exhibit 5)

A key factor influencing aftermarket volume growth is the age distribution of the vehicle parc. Vehicles between 4 and 8 years old exhibit the highest per-vehicle spending across both the IAM and AR channels, while vehicles older than 16 years generate about half that amount. However, spending patterns vary significantly between the two channels. IAM spending is highest for vehicles aged 12 to 16 years, and even vehicles older than 16 continue to contribute a substantial share. As a result, aging significantly drives long-term growth of the IAM. (see Trend 1)

Across Europe, IAM strength varies by region. Germany and France align closely with the overall European average, benefiting from broad automotive expertise in population and among small workshops. In contrast, countries with a younger vehicle parc and high BEV adoption, like in the Nordics and the Netherlands, exhibit significantly higher shares in the AR channel. On the other hand, IAM penetration is notably stronger in Southern and Eastern Europe. Poland, for example, leads this group with an IAM share exceeding 70%, though this is expected to decline slightly as the vehicle parc expands and economic growth in the country continues.

Customer segments: B2B still most significant, with B2C increasing

B2B and B2C segmentation

Auto parts wholesalers serve the DIFM end-customers in the IAM through workshops and other players providing services and parts. From the wholesale perspective, these are therefore considered B2B customers. DIY and IIFM customers, however, are directly serviced by offline retailers, online parts retailers and general online retailers. Therefore, they are considered the B2C segment.

The B2B segment can be further segmented into the following groups:

Garages (franchised, non-franchised, and specialized): Professional workshops handling vehicle maintenance and repairs for both B2C and B2B clients
Auto centers, fast fitters, and tire specialists: High-volume providers focused on quick repairs, tire services, and basic maintenance
Retail stores (e.g., petrol stations): Businesses selling automotive products alongside fuel and convenience items, typically stocking fast-moving goods like wiper blades, oils, and basic accessories
Fleets with in-house repair workshops: Organizations maintaining their own vehicles, often sourcing high-turnover parts for internal servicing
Independents: Small, standalone mechanics offering personalized service and niche expertise, often not affiliated with a specific garage

B2C customers, who are also end users are the two groups already mentioned:

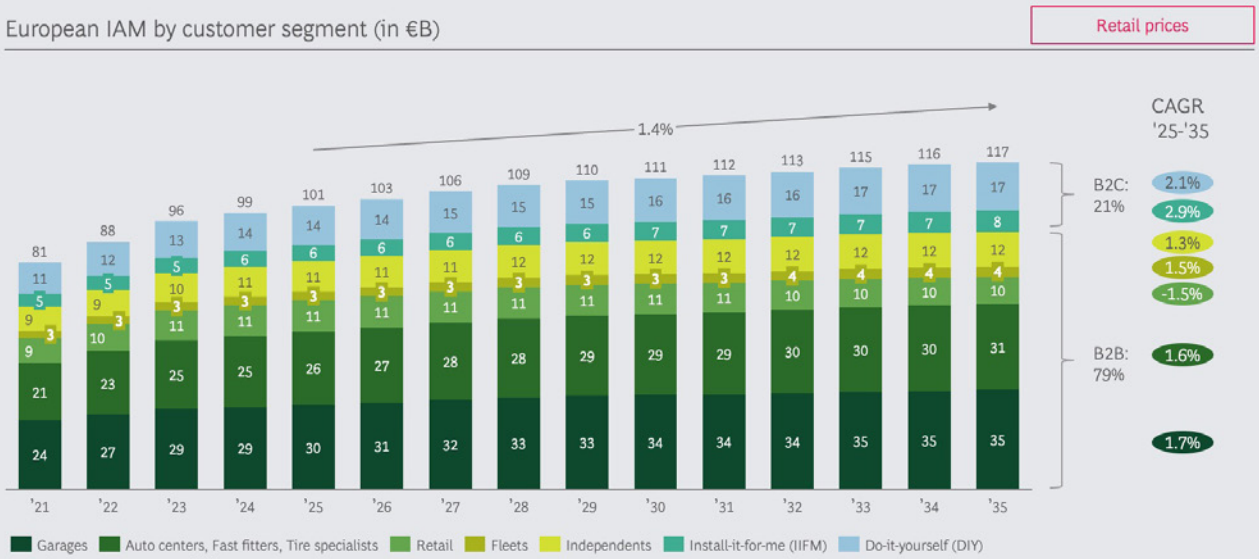
Do-it-yourself (DIY): Individuals performing their own vehicle repairs and maintenance
Install-it-for-me (IIFM): Customers who buy parts but rely on workshops for installation and repairs

Overall IAM growth, with B2C share growing to ~21%

The total independent aftermarket (IAM) is expected to reach ~€117B by 2035, with the B2C segment making up 21% of the total market. End consumers are gradually shifting their purchasing behavior, with cost considerations playing a key role in this change. In a challenging macroeconomic environment, more customers are moving away from traditional Do-it-for-me (DIFM) services at garages and opting for Install-it-for-me (IIFM) or Do-it-yourself (DIY) solutions. Accordingly, the DIY segment reaches a volume €17B by 2035, while IIFM grows from €6B to €8B. (see Exhibit 6). The DIY growth is also related to the aging car parc, as ability and willingness to spend on services for older cars declines.

Meanwhile, the B2B segment remains the key driver of the overall IAM, reaching €92B by 2035, which equals a 79% share of the total. Within this, location-based service providers (garages, auto centers, fast fitters, tire specialists and fleets) will generate €71B (77% of B2B) of business. The remainder is split between retail (€10B) and independents (€12B).

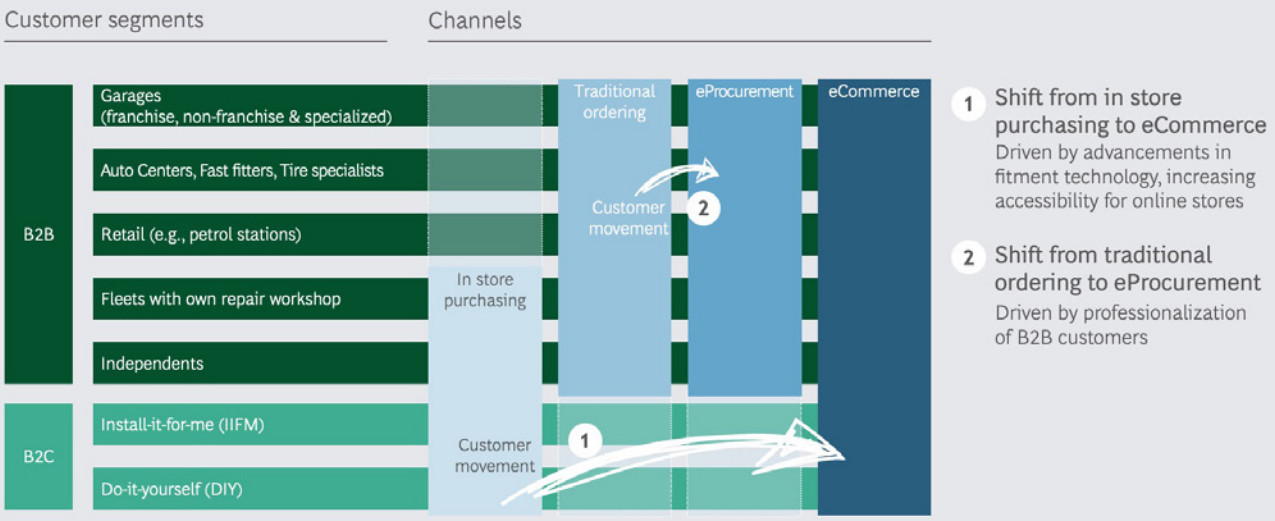
Exhibit 6 | B2B remains highest share of IAM core market, with slight shifts toward DIY (in B2C) and Garages/ Auto centers (in B2B)



Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

eCommerce and eProcurement on the rise

Exhibit 7 | Four main channels span the IAM playing field with shifting purchasing behavior towards online channels



Sources: BCG analysis

Four distinct channels describe how B2B and B2C customers buy parts:

1. **In store purchasing:** Physical retail stores where customers browse and buy products on-site

2. **Traditional ordering:** Manual B2B product ordering process via phone, fax, or paper forms

3. **eProcurement:** Digital (closed) B2B procurement systems to streamline purchasing

4. **eCommerce:** Open online platforms for browsing, buying, and transacting products

The European automotive IAM is evolving rapidly, with digital tools and platforms reshaping purchasing behavior. Across European markets, a landslide shift from traditional ordering and in-store channels toward eProcurement and eCommerce is underway. This transformation is driven by technological advancements, increasing digital adoption, and a higher price sensitivity in both B2C and B2B segments. As adoption accelerates, businesses must embrace eCommerce and eProcurement to remain competitive in an increasingly digital landscape. (see Exhibit 7)

For DIYers and IIFM customers, eCommerce penetration is expected to grow from ~30% to ~70% by 2035. Improved parts identification, seamless digital shopping experiences, and consumer preference for online convenience are fueling this trend. Omnichannel solutions, such as click-and-collect and integrated service offerings, further enhance adoption. Workshops and fleets are undergoing a similar transition, with eProcurement replacing traditional ordering methods. Currently, 58% of workshops use eProcurement, a number projected to exceed 70% by 2035. Moreover, eCommerce platforms offer competitive pricing, broader product selection, and increasingly venture into offering integrated garage management systems. Workshops are shifting from reactive to planned ordering, leveraging predictive analytics and digital tools to optimize inventory and improve cost transparency.

eCommerce competitive landscape: Online parts retailers, general online retailers, and incumbents are competing for market shares

The B2C eCommerce market for automotive parts is divided between online parts retailers and general online retailers like Amazon and eBay. Historically, eBay has been a key platform for both B2B and B2C customers, offering a vast selection of new and used parts at competitive prices through its marketplace model, used by both B2B and B2C customers. In the past decade, specialized platforms such as AUTODOC, Kfzteile24, and Oscaro have emerged as strong competitors, leveraging advanced technology, social media engagement, and superior fitment assurance to attract customers. Amazon has also gained traction in the sector, particularly with its Garage offering, which enhances the customer experience by streamlining part selection. Meanwhile, wholesalers and workshop groups have ex-

panded their digital presence but face challenges in competing with dedicated online players.

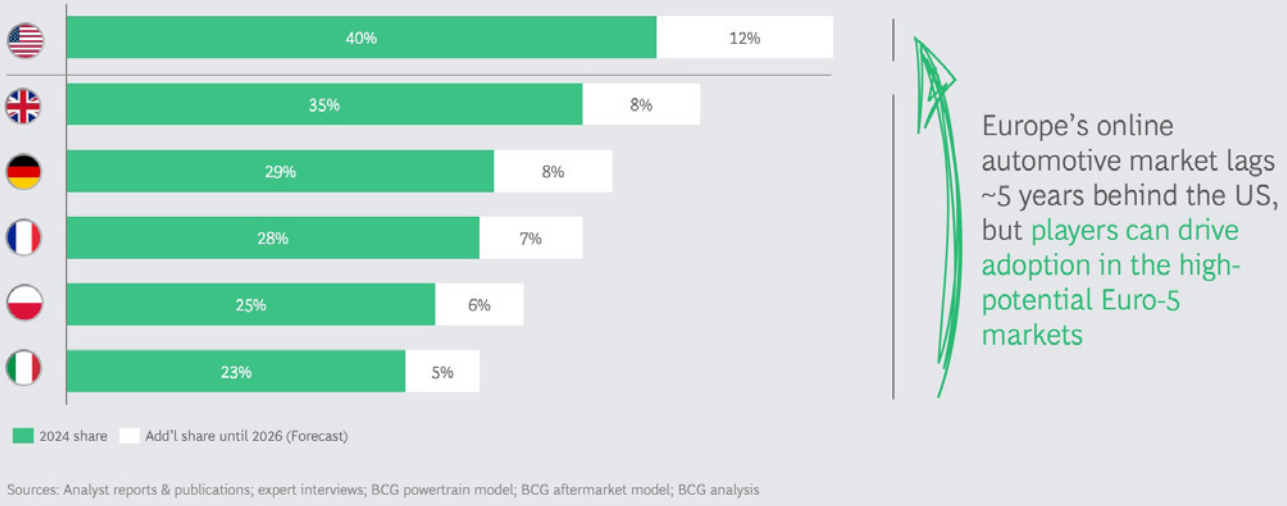
Success in this environment depends on different factors, as B2C customers prioritize price, product variety, and digital support, while B2B buyers, although they care about price, place greater emphasis on logistics, availability, and technical assistance. Wholesalers have historically been strong in these B2B dimensions, but the competitive landscape increasingly mirrors that of tech and eCommerce rather than the traditional aftermarket. Effective customer acquisition strategies, including strong SEO and paid advertising, are essential to driving traffic without excessive costs. Additionally, seamless software integration for fitment accuracy, user-friendly mobile applications, and community engagement via social media have become critical differentiators in attracting and retaining customers.

Beyond digital capabilities, key operational elements such as cost-effective supply management, reliable logistics, and consistent product quality remain crucial to success. Market leaders must focus on optimizing their supply chain to maintain price competitiveness while ensuring fast and dependable delivery. As consumer expectations evolve, companies that combine robust digital infrastructure with efficient fulfillment processes and strong brand engagement will be best positioned to capture market share in the growing B2C automotive eCommerce space.

B2C eCommerce in automotive: a growing market with untapped potential – especially in Southern Europe

Exhibit 8 | ~30% of EU customers already buy parts online, indicating strong future eCommerce potential

Share of customers buying automotive parts online by country (in %)



Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

Currently, approximately 30%, (29% for Germany) (Exhibit 8) of European customers already purchase some of their automotive parts online. However, online market penetration in Europe lags the U.S. by approximately five years. Wholesalers with an online presence and dedicated eCommerce players are likely to drive penetration in key European markets going forward.

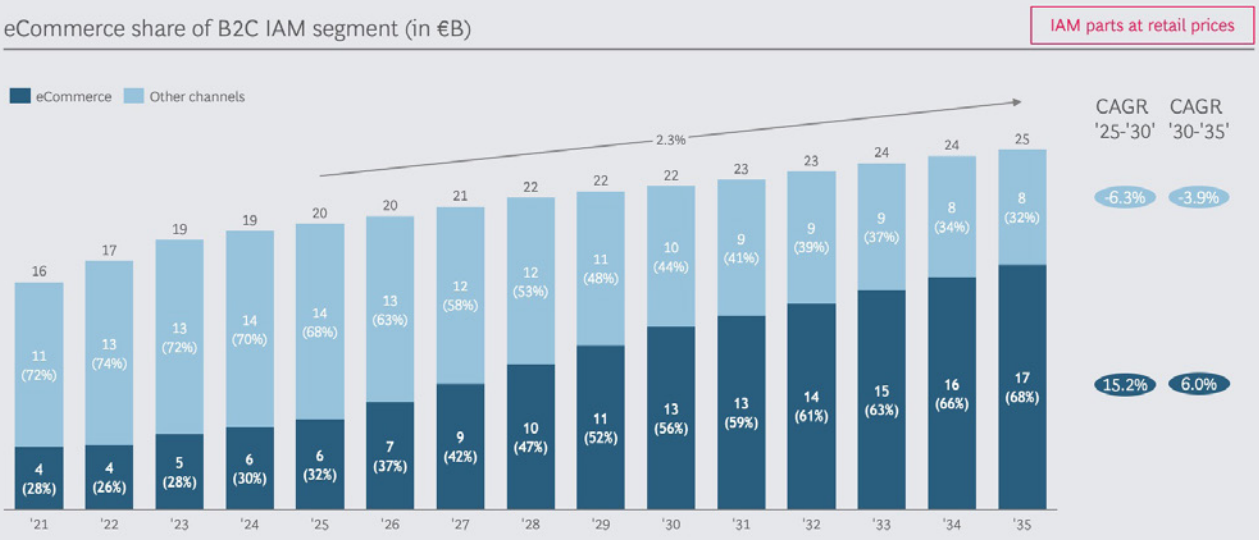
Still, the online adoption varies by country, influenced by factors such as consumer behavior, logistics infrastructure, retail structure, and economic conditions. Markets such as Italy present significant growth opportunities, where tailored online strategies that focus on customer education can enhance adoption and drive sales. In more developed eCommerce markets, such as the UK, partnerships with garages can deepen penetration and improve customer trust, leading to sustained growth. Overall, B2C eCommerce in Europe's automotive parts market is expanding at different rates across countries.

- **Germany's eCommerce penetration** is projected to see eCommerce penetration grow significantly from 29% in 2024 to 70% by 2035, representing a 10.5% CAGR. This shift is primarily driven by increasing consumer preference for cost-effective pricing and faster delivery, which is leading to a decline in traditional B2C sales channels. Additionally, the expansion of digital payment solutions and improved logistics infrastructure are further supporting the rapid growth of eCommerce adoption in the country.

- **Italy** is currently below the European average in B2C eCommerce penetration, standing at approximately 23% in 2024 compared to the expected 30% EU average in 2025. The dominance of brick-and-mortar stores continues to slow the shift to online purchasing. However, as consumer confidence in digital transactions increases, Italy's eCommerce market is expected to grow at a strong pace of 10.9% annually, reaching 58% penetration by 2035. The rising adoption of digital payment methods and enhanced last-mile logistics solutions are further facilitating this transition, making online purchasing more accessible and attractive to Italian consumers.

- **Poland** is experiencing the fastest eCommerce expansion in the automotive parts sector, with an anticipated compound annual growth rate of 13% between 2025 and 2035. The increasing preference for online purchasing is largely driven by consumer demand for lower costs and better availability. Price-sensitive buyers are increasingly favoring competitive online marketplaces, accelerating the shift away from traditional retail models. As digital adoption continues to rise across Europe, eCommerce will play an increasingly dominant role in the automotive parts market.

Exhibit 9 | B2C segment: ~10% annual growth of eCommerce share across B2C segment driven by key trends such as new marketplaces



Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

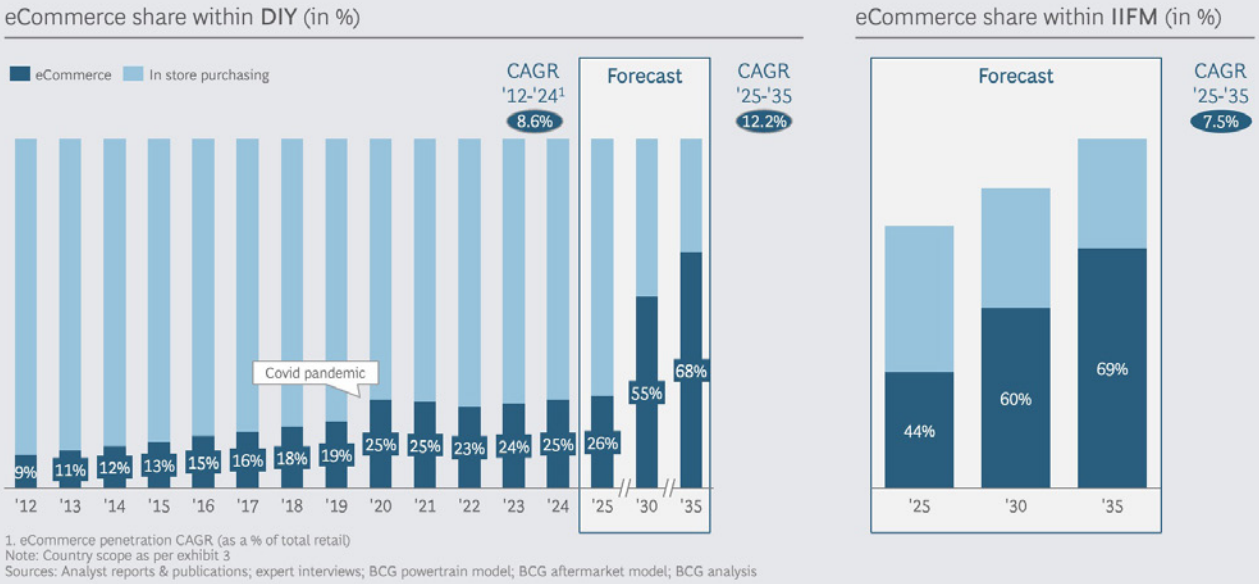
The B2C eCommerce share is projected to grow from 32% in 2025 to 68% in 2035 (~10% CAGR) as the total B2C segment reaches €25B. Growth will be driven by online parts retailers and general online retailers expanding their auto parts categories, leveraging broad assortments and economies of scale. Price transparency and accessibility, particularly among digital-native consumers (who are estimated to make up ~50% of the light vehicle market by 2030), will further accelerate online penetration. Likewise, increased collaboration between online and offline channels will reinforce eCommerce adoption. After 2030, B2C eCommerce growth is expected to slow as traditional retail adapts with enhanced service offerings, improved logistics, and competitive pricing and a portion of customers remains hesitant to shift online.

B2C segment: Strong DIY eCommerce growth fueled by access to education

B2C eCommerce is driven by both DIY and IIFM customers, with the larger DIY segment expected to grow at 12.2% CAGR (2025-2035), while the smaller IIFM segment is projected to expand at 7.5% CAGR (2025-2035). In the DIY segment, ~74% of purchases occur in-store in 2025, but this share is expected to shift, with ~68% of purchases taking place online by 2035. Innovations in vehicle fitment technology and enhanced search functionalities are increasing customer confidence, reducing false orders, and fueling stronger eCommerce growth. Vast assortment, access to online explanation videos, high quality hotlines and review pages are further building trust in online shopping. Additionally, price transparency in online offerings is shifting demand from used to new parts.

For IIFM customers, 44% of purchases are made online in 2025, increasing to 69% by 2035. Workshop resistance to "external parts" remains a key barrier, but as online platforms prove their reliability, confidence continues to grow. Price transparency is further driving online purchases, while increasing market pressure is encouraging greater acceptance among workshops. In addition, more suppliers are integrating with online platforms, offering competitive pricing and faster delivery times, further driving eCommerce adoption in the IIFM segment.

Exhibit 10 | eCommerce share in DIY segment growing due to increased fitment confidence in non-discretionary segment; IIFM already starting at higher share



1. eCommerce penetration CAGR (as a % of total retail)
Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

B2B segment: Distinct shift of clients towards online channels, reducing traditional ordering

B2B remains the primary segment of the IAM, gradually expanding to €92 billion by 2035. While this growth is in line with the general IAM growth, we can observe a channel shift from traditional ordering to digital channels.

Currently, eProcurement dominates the market, accounting for 58% of transactions, followed by traditional ordering at (29%), eCommerce at (9%), and in-store purchasing at (4%). Over the next decade, the shift away from traditional ordering will accelerate, with eProcurement growing at a CAGR of 3.5% and eCommerce at an even faster rate of 6.2% from 2025 to 2035.

Workshops' ordering behavior plays a significant role in this transition. Many workshops currently place orders reactively, often relying on same-day deliveries due to habit rather than necessity. However, a substantial portion of repairs involve predictable demand for parts, creating opportunities for scheduled ordering. As workshops shift from reactive to planned procurement, they seek to integrate their planning tools with eProcurement. (Exhibit 11)

By 2035, eProcurement is expected to strengthen its market share to 73%, while eCommerce will grow to 14%, surpassing traditional ordering, which is projected to decline to 12%. In-store purchasing will become almost negligible at just 1%. The growing dominance of online channels—both eProcurement and eCommerce—is largely attributed to several key advantages. These include lower operational costs, more streamlined supply chains, and simplified part identification, all of which contribute to improved repair scheduling, reduced downtime, and increased productivity for B2B clients. Additionally, comprehensive product descriptions and fitment, technical specifications, and technical support from wholesalers provide B2B buyers with the information needed to make well-informed purchasing decisions, further solidifying the appeal of digital procurement solutions.

The share of eProcurement in the B2B segment varies significantly across European markets. While all countries are seeing a shift toward digital procurement, the pace of adoption and market penetration levels differ due to differences in digital adoption, supplier relationships, and market structures. This can be illustrated with a few examples:

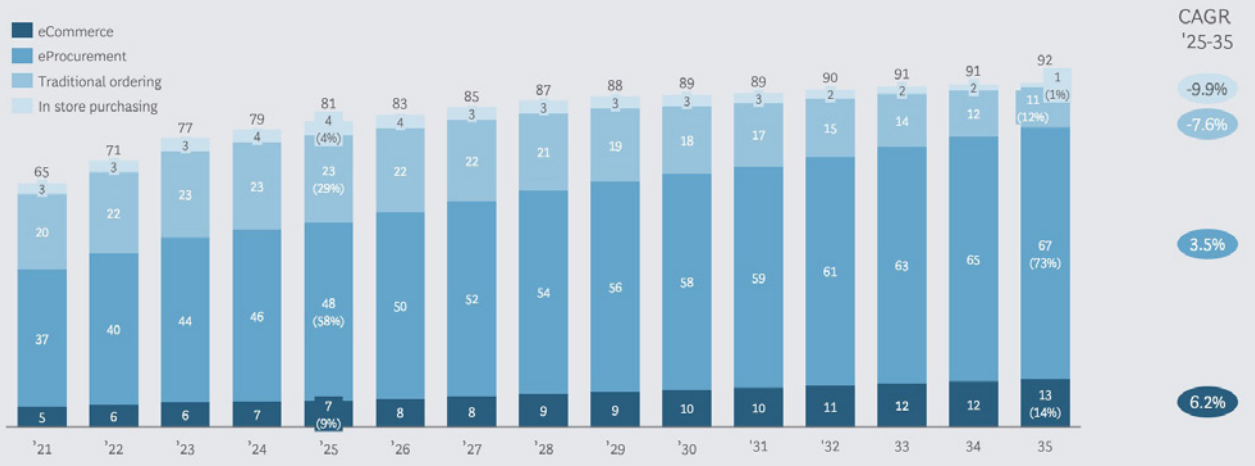
- **Germany's** B2B eProcurement market is set to grow at a CAGR of 3% from 2025 to 2035, reaching a penetration rate of 77%, slightly above the European average. This growth is primarily driven by the increasing professionalization of workshops and a high proportion of large, franchised workshop networks. These larger players are well-positioned to implement eProcurement solutions, benefiting from streamlined ordering processes and automation.

- **Italian** workshops are also embracing eProcurement, with penetration expected to rise from approximately 47% in 2025 to 63% in 2035. However, despite this growth, Italy will maintain a relatively high reliance on traditional ordering channels, which will still hold over 20% market share by 2035. This is largely due to the country's highly fragmented market structure and a strong preference for direct supplier relationships, which continue to play a crucial role in procurement decisions. In addition, the „Ricambisti" (small wholesalers, often referred to as jobbers) exhibit a lower likelihood of adoption of eProcurement solutions.

- **In Poland**, the expansion of digital capabilities by larger distributors is accelerating the adoption of eProcurement, with an above-average CAGR of 6.1% from 2025 to 2035. Independent workshops and fleet operators are increasingly turning to online channels for purchasing parts, attracted by better pricing and improved accessibility. This trend is not only driving the growth of eProcurement but also contributing to the broader expansion of online procurement channels in the Polish market.

Exhibit 11 | B2B segment: Strong shift of B2B clients towards online channels provides growth potential for online parts retailers and wholesalers

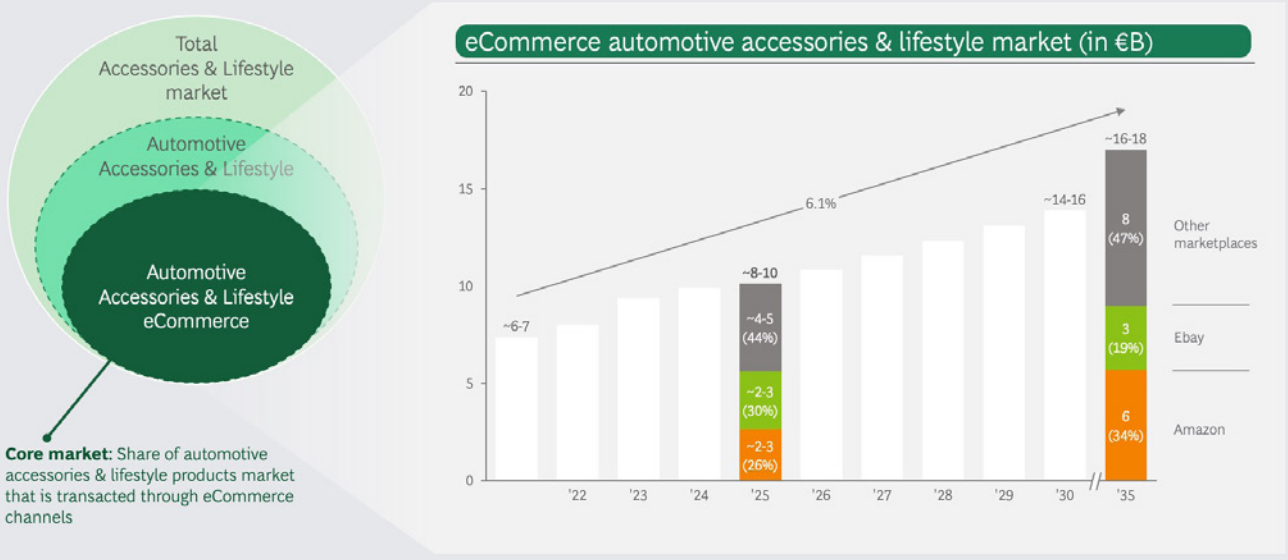
Share of B2B IAM by channels (in €B)



Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews; BCG powertrain model; BCG aftermarket model; BCG analysis

Untapped potential: The accessories and lifestyle market

Exhibit 12 | Accessories & lifestyle market with additional potential of ~€16-18B



Note: Country scope as per exhibit 3
Sources: Analyst reports & publications; expert interviews;; BCG analysis

Next to the core automotive parts market of €117B (IAM), we have identified the adjacent market for eCommerce auto accessories and lifestyle products - valued at approximately €16-18 billion. It specifically encompasses automotive-related accessories and lifestyle products purchased online, such as travel and adventure gear, and lifestyle products like cushions and keychains.

Currently, this market is largely dominated by U.S.-based eCommerce players, with Amazon and eBay being the major two platforms. Both platforms benefit from extensive supplier networks and marketplace models, offering a vast assortment of products combined with logistics advantages like Prime shipping.

The customer base for automotive accessories and lifestyle products differs from the traditional auto parts market, creating potential opportunities for aftermarket players and new entrants. As traditional market boundaries blur, automotive parts businesses are increasingly expanding into adjacent segments. Leveraging their existing customer base, they can use core car parts as anchor products to drive additional sales. From the other end, accessories serve as an entry point for new customers who may not have initially considered purchasing auto parts, thereby expanding overall market potential.

Implications: Online market presents opportunity with fierce competition

The European automotive IAM is undergoing a significant transformation, with digital channels reshaping purchasing behavior. Traditional ordering methods and in-store shopping are steadily declining, giving way to eProcurement and eCommerce, which offer enhanced efficiency, and competitive pricing. By 2035, eProcurement is expected to dominate B2B transactions, particularly among workshops and fleet operators, who are shifting toward structured, automated purchasing. Meanwhile, B2C eCommerce is experiencing rapid expansion, driven by a growing desire for digital solutions among consumers, improved fitment technologies, and nascent omnichannel solutions that bridge online and offline retail experiences. To win in this market, key players must adjust their strategies and address key needs – this depends on their role in the market:

OEMs

should adapt to the digital transformation of the aftermarket by expanding their presence in IAM while maintaining their brand's premium positioning. To compete with IAM players, OEMs need to address the growing demand for cost-effective solutions by offering competitively priced alternatives, including remanufactured parts. With the rise of battery electric vehicles (BEVs), OEMs are well-positioned to lead in supplying specialized BEV components. By investing in AI-driven predictive maintenance and connected vehicle solutions, OEMs can create service-driven ecosystems that provide long-term value and foster customer loyalty, ensuring they remain dominant players in an increasingly digital and competitive aftermarket. In addition, OEMs should explore and invest into eCommerce solutions in suitable products such as accessories, allowing them to build business based on their existing customer relationships.

Suppliers

can leverage the shift in the market to engage more directly with workshops and strengthen their relationships with eCommerce players. As ordering patterns evolve, they may need to adjust their supply and inventory strategies accordingly. The ongoing EV transformation demands a stronger focus on new EV parts while allowing suppliers to capitalize on their existing expertise and networks. At the same time, they must develop a structured approach to private label offerings, ensuring brand differentiation remains intact. Additionally, the digitization of the ordering process calls for seamless, end-to-end supply chain integration. To stay competitive, suppliers must provide a cohesive and efficient experience for wholesalers and workshops alike.

Wholesalers

(e.g., LKQ, EuroCarParts) play a central role in this transformation but face increasing competition from online parts retailers such as AUTODOC or Kfzteile24, which are increasingly targeting their workshop customers. To defend their market shares, they must embrace technological advancements, rethink their offering of daily fast deliveries, and continue to scale operations to improve their cost position. Supporting workshops in digitalization and leveraging B2C data would allow them to strengthen their central position in today's aftermarket. Wholesalers should consider partnerships with pure digital players to combine the strengths of their own physical network with digital capabilities.

Online parts retailers

such as AUTODOC, Kfzteile24 and Oscaro are well-positioned to capitalize on B2C adoption but are competing for a finite group of DIYers and IIFM customers. They should continue to expand their efforts in the B2B segment, where growth potential is higher and ~80% of the business is expected to remain. Building partnerships with workshops and fleets will be crucial, particularly in capturing the install-it-for-me (IIFM) segment and expanding the online DIFM business. In addition, they can use their strong position among DIY customers to extend their reach into adjacent opportunities in accessories – a ~€16-18B market.

General online retailers

like Amazon and eBay must decide whether to invest in specialized automotive solutions or continue with a generalist approach. Automotive buyers require accurate parts identification, fitment assurance, and technical support, areas where these platforms currently lack specialized expertise. Partnerships with industry players could help address these gaps, but the key question remains whether they are willing to make the necessary investments to effectively cater to this segment

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Workshops

must enhance their procurement and operational planning to optimize capacity and reduce sourcing costs. As online channels grow, workshops need to integrate digital and physical service models, allowing customers to seamlessly merge inline research with in-person services. However, maintaining flexibility in supplier relationships is crucial to prevent over-reliance on a single platform. Adjusting pricing strategies by optimizing service margins while benefiting from lower part costs will help workshops stay competitive in the digital age. Where needed, workshops can use digital platforms as an additional channel to acquire customers.

End-customers

emerge as the winners in this digital transformation, benefiting from lower prices, greater transparency, and a wider variety of purchasing options. All of this unfolds against a backdrop of continued parts price inflation and cost of living pressures. As digital adoption accelerates, competition among suppliers will further enhance the overall customer experience.

The European IAM is undergoing a fundamental shift as digitalization transforms how parts are sourced, sold, and serviced. Traditional ordering and in-store purchases are giving way to eProcurement and eCommerce, enhancing price transparency, and reshaping competitive dynamics. This shift impacts every player in the ecosystem, requiring them to rethink their role and value proposition. To remain competitive, IAM players must develop dedicated offerings that address these changes and expand their capabilities through partnerships. The future of the IAM will be defined by those who successfully integrate technology, partnerships, and customer-centric strategies to navigate a highly digital and interconnected marketplace.

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