



The automotive aftermarket in Germany

- extended version -

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Example report

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There are about 160 short profiles for the German market. For other countries there are about 80 profiles in average per country.

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1 Introduction

This report is about the automotive aftermarket in Germany. It's part of an European wide study about the automotive aftersales market. The data is based on various sources like the official statistical databases, interviews with market experts and publications. The whole report is mainly about passenger cars. Mostly the data is from the year 2007. Only in a few cases where it's explicitly stated, the data refer to another year.

Definitions

The automotive market is divided into two fields. On the one hand the companies, which are dependent from the car manufacturers (OES), on the other hand the companies, which are independent from the car manufactures (IAM). The data of the whole report is mainly about passenger cars. However many companies are doing business in the entire motor vehicle branch. That means no company mentioned in this report is specialized in passenger cars only.

In all cases the number of employees is given, the active company owner or the managing director also counts to the employees. Also the persons for bookkeeping and organisational tasks and the half time workers are among the employees. Turnover, staff and employees are given per country, NOT for the whole company including all subsidiaries.

2 General information about Germany

2.1 General data

| | |
|--------------------------|--|
| official name | |
| name in country language | |
| land borders with | |
| capital city | |
| EU – member | |
| area in km ² | |
| population | |
| currency | |
| time zone | |
| internet TLD | |
| calling code | |
| government | |
| federal Chancellor | |

Table 1: General data



Illustration 1: Germany in Europe

2.2 Economical data

| | |
|-------------------|------------|
| GDP in € | 2.423,8 bn |
| GDP growth | 2,9% |
| GDP per capita | 29.464 |
| inflation | 2,2% |
| unemployment rate | 8,1% |

Table 2: Economical data 2007

3 Vehicle fleet

Attention: Between 2006 and 2007 the count system of the statistical office in Germany has changed. From the 01.01.2007 only passenger cars which are really in use counts to registered passenger cars. Not the ones which are temporarily deregistered.

All data is based on the figures given by the official statistic office of Germany. The figures are from 31.12..

3.1 Passenger car fleet

| | 2006 | 2007 |
|------------------------------|------|------|
| registered passenger cars | | |
| average age in years | | |
| first registrations | | |
| production of passenger cars | | |
| - Audi | | |
| - BMW | | |
| - Daimler Chrysler | | |
| - Ford | | |
| - Opel | | |
| - Porsche | | |
| - Volkswagen | | |

Table 3: Car fleet in Germany at the 31.12.

3.2 Truck fleet

| | 2006 | 2007 |
|----------------------|------|------|
| registered trucks | | |
| first registrations | | |
| production of trucks | | |

Table 4: Truck fleet in Germany at the 31.12.

3.3 Bus fleet

| | 2006 | 2007 |
|---------------------|------|------|
| registered buses | | |
| first registrations | | |
| production of buses | | |

Table 5: Bus fleet in Germany at the 31.12.

4 Structure of OES-distribution/garages

4.1 Figures by kind of OES outlet

| kind of outlet | no. of outlets | turnover in mio. € | employees |
|--------------------------------|----------------|--------------------|-----------|
| car manufacturer owned outlets | | | |
| offering sales and service | | | |
| offering only service | | | |
| offering only sales | | | |
| total | | | |

Table 6: OES outlets and employees 2007 (turnover + employees estimated)

In Germany there are about 420 manufacturer owned outlets. Furthermore there are about 18.000 franchised car dealers with a garage, circa 400 dealers without a garage and 6.400 authorized repairers, which are not selling cars.

The following table shows the turnover and all employees working in the service field of OES garages/dealers. That includes the maintenance and repair of cars, the selling of parts to end consumers and other garages. It's excluding car sales, financial services, and other possible business fields of the OES dealer like dealing in real estate.

| kind of outlet | no. of outlets | turnover in mio. € w.o. car sales | staff w.o. car sales |
|---|-----------------------|--|-----------------------------|
| car manufacturer owned outlets offering sales and service | | | |
| offering only service | | | |
| offering only sales | | | |
| total | | | |

Table 7: Service turnover OES

4.2 Largest car dealer groups

| name | turnover in mio. € | sold cars (new+used) |
|---------------------|---------------------------|-----------------------------|
| AVAG | | |
| DAH | | |
| MAHAG | | |
| Gottfried Schultz | | |
| Wellergruppe | | |
| Fahrzeug-Werke Lueg | | |
| Hahn | | |
| Feser und Graf | | |
| Edgar Kittner | | |
| Kamps-Gruppe | | |
| Ernst Dello | | |
| Cloppenburg | | |
| Auto-Staiger | | |
| total | | |

Table 8: The largest car dealers by turnover in 2006, figures include business abroad

5 Structure of IAM distribution

This chapter is about the distribution flow from the parts manufacturers to the wholesalers to the repairers up to the end consumers.

5.1 Trade and buying groups

Trade and buying groups are associations of free independent members (not contracted by the industry). The four big European wide acting trade and buying groups are:

- AD International
- GAU International
- Temot International
- ATR International

| name | European mother association | employees | turnover in mio. € | outlets |
|--------------|-----------------------------|-----------|--------------------|---------|
| CARAT | | | | |
| Coparts | | | | |
| ATR | | | | |
| Centro | | | | |
| ATEV | | | | |
| CAR | | | | |
| Carprofi | | | | |
| Select AG | | | | |
| Temot | | | | |
| Karo S | | | | |
| Total | | | | |

Table 9: Trade and buying groups

5.2 Specialised trade and buying groups

These groups are similar to 'normal' trade and buying groups, but with the difference that they specialise in one product group, such as tyres, glass, paint etc.

| name | specialisation |
|----------------------------|----------------|
| Reifenpartner point S GmbH | |
| Top Service Team | |
| FRI | |
| EFR | |
| Innovation Group AG | |
| Eurogarant Auto Service | |

Table 10: Specialised Tradegroups

5.3 Autocentres

Autocentres are retailers with integrated car service, selling to end consumers. Attention: Autocentres are not! = Fast Fitters and are also not! = specialized car services (like in tyres, glass, climate service, etc.)

| name | outlets | employees (est.) | turnover in mio. € (est.) |
|---------------------------------|---------|------------------|---------------------------|
| A.T.U GmbH & Co. KG | | | |
| AUTO plus (Carat) ¹⁾ | | | |
| Autopartner ¹⁾ | | | |
| Coparts Plus ¹⁾ | | | |
| Motoo ¹⁾ | | | |
| Trost TVP ¹⁾ | | | |
| PV TVP ¹⁾ | | | |
| Boxenstop ¹⁾ | | | |
| Afra | | | |
| ATOS ¹⁾ | | | |
| Other ¹⁾ | | | |
| total | | | |

Table 11: Autocentre chains 2007

1) only outlets incl. auto service

5.4 Retail chains

National retail chains sell auto parts and accessories to end consumers. They don't offer any auto service.

There are no mentionable retail chains in Germany. This function have auto centres and small distributors.

5.5 Wholesale distributors

Wholesale distributors buy parts from the parts manufacturers or larger wholesalers and sell these parts to smaller wholesalers or to garages.

We have clustered the wholesalers into three groups:

- small distributors → turnover less than 3 mio. euro
- medium distributors → turnover between 3 and 20 mio. euro
- large distributors → turnover higher than 20 mio. euro

| size of company | number of companies | total turnover in mio. Euro | employees |
|-----------------|---------------------|-----------------------------|-----------|
| Small | | | |
| Medium | | | |

| | | | |
|--------------|--|--|--|
| Large | | | |
| Total | | | |

Table 12: The wholesale companies in Germany 2007

The five largest distributors in Germany are:

| name | outlets | turnover in mio. € |
|--------------------|---------|--------------------|
| Eugen Trost | | |
| PV Autoteile | | |
| KSM ServiceTechnik | | |
| Wessels + Müller | | |
| Stahlgruber | | |

Table 13: Five largest parts distributors

5.6 Specialized distributors/wholesalers

Specialised wholesalers are companies, which buy parts directly from the parts producers or from a large wholesaler. These wholesalers specialise in one product group. This specialisation could be in:

- glass
- tires
- truck parts
- electronic
- paint
- oil
- makes
- etc.

The large specialised distributors in Germany are:

| name | specialisation | outlets |
|----------------------------------|----------------|---------|
| JapCar Ersatzteildienst | | |
| Autoteile Post | | |
| AGC Automotive Replacement Glass | | |
| Pilkington AGR Deutschland | | |
| Saint-Gobain Autover Deutschland | | |
| Pneuhage | | |
| Meyer Lissendorf | | |
| Interpneu | | |
| ABC Autoglas | | |
| Christian Winkler | | |
| Hofmeister & Meincke | | |
| Europart Holdingh | | |

Table 14: Selection of large specialised distributors in Germany 2007

5.7 Direct distributors

Direct distributors are companies which sell directly to garages. The largest direct distributors in Germany are:

| name | total turnover in mio. € (whole world) |
|---------------|--|
| Albert Berner | |
| Normfest | |
| Adolf Würth | |
| Theo Förch | |
| Tunap | |

Table 15: Most important direct distributors 2007 in Germany

5.8 Rack jobber

Rack jobbers are companies which deliver wearing parts and accessories to gas stations, warehouses and / or specialist retail stores. They rent racks in these distribution channels and fill them by them self. They useably don't have a high share of automotive parts.

| name | total turnover in mio. € (whole world) |
|------------------|--|
| Lekkerland | |
| Stinnes Intertec | |

Table 16: Large rack jobbing companies in Germany

5.9 E-Commerce companies

E-Commerce companies are dealing with automotive parts mainly via the internet. In Germany the following companies are e-commerce companies.

| name |
|------------------------------------|
| Ebay motors |
| D&W repairs |
| AutoScout24 Deutschland |
| Renet Recycling Netzwerk Automobil |
| motoso.de |

Table 17: E-Commerce companies in Germany 2007

6 IAM repairers

The total amount of automotive repairers (IAM) in Germany is:

| kind of garage | turnover in mio. € | outlets | employees |
|-------------------------|--------------------|---------|-----------|
| IAM multi brand garages | | | |
| IAM specialised garages | | | |
| IAM fast fitter | | | |
| total | | | |

Table 18: Overview about the independent repairers in Germany 2007

6.1 Multi brand garages

There are ca. X independent multi brand garages in Germany. These garages have made a total turnover of X million euro in the year 2007.

6.2 Specialists

There are ca. X garages which have a specialization in repairing cars. These companies made a turnover of app. X million euro in 2007.

| specialisation | number of outlets | turnover in mio. € | number of employees |
|--|-------------------|--------------------|---------------------|
| engine remanufacturers / re-conditioner | | | |
| body and paint shops | | | |
| tyre specialists with and without additional car service | | | |
| specialist in electrics/electronics/diesel | | | |
| specialists in climate service | | | |
| auto glass specialists | | | |
| other specialists not listed above (mobile fitters, car care etc.) | | | |
| total | | | |

Table 19: Specialised IAM repairers in Germany 2007

6.3 Fast fit chains

Fast Fit chains offer a lean service (lower half services) for passenger cars. They mostly offer tires including service. Furthermore brakes, exhausts, oil, shock absorber and air condition.

| name | number of outlets | turnover mio. € | in | number of employees |
|--------------|-------------------|--------------------|----|---------------------|
| Pit-Stop | | | | |
| total | | | | |

Table 20: Fast fit chains in Germany

6.4 Garage marketing systems

The garage marketing systems are partner systems driven by the buying groups or the parts manufactures. The number of garage marketing system partners is already included in the number of IAM repairers above.

They are divided into two groups. The full service systems which are offering the complete service for all brands and the product orientated systems which are specialized in single product groups like tires, auto glass and climate. The distance retail brands of the parts industry like OSS/ZF Trading are not included in this report. Most of garage marketing systems are based on partnership-contracts and are only in few cases based on "real franchising".

6.4.1 Fullservice garage marketing systems

| name | outlets |
|--------------------------|---------|
| ad AUTO DIENST | |
| autofit | |
| AC Auto Check | |
| Meisterhaft | |
| Profi Service Werkstatt | |
| 1a autoservice | |
| MOTOO Systemzentrale | |
| ASP Auto Service Partner | |
| Automeister | |
| AutoCrew | |
| Bosch Car Service | |
| premio | |
| die autowerkstatt | |
| Auto-Einmal-Eins | |
| Auto Auto | |
| German Top | |
| Total | |

Table 21: Fullservice garage marketing systems

6.4.2 Product orientated garage marketing systems

| name | specialisation | outlets |
|---|----------------|---------|
| Five Star | | |
| Acoat Selected | | |
| CUI (Colors Unlimited Intern.) | | |
| IDENTICA | | |
| Rep@net | | |
| ColorMotion | | |
| Euromaster | | |
| First Stop | | |
| HMI ¹⁾ | | |
| MLX | | |
| Pneumobil | | |
| Quick | | |
| Vergölst/Reidi | | |
| Carglass | | |
| ISER | | |
| junited | | |
| KS Autoglas Zentrum | | |
| Wintec | | |
| Scheibendoktor | | |
| SCHWABO Autoglas | | |
| Top Glass | | |
| Ihr Autoglaser | | |
| ABC Autoglas | | |
| HUK SSP ¹⁾ | | |
| Global Automotive Service ¹⁾ | | |
| Mc Car | | |
| Motor Care ¹⁾ | | |
| Nobilas ¹⁾ | | |
| ZKF Eurogarant ¹⁾ | | |
| Total | | |

Table 22: Product orientated garage marketing systems

¹⁾: double membership in other systems possible

7 Aftermarket volume

Aftermarket volume includes all turnover from new or rebuilt components (but **not** used components) after the purchase of a new passenger car. The value is shown in euro to end consumer prices without VAT for private as well as company passenger cars (fleets). The aftermarket volume includes material which is built in during a repair or maintenance job and also the material which is bought from a garage, a wholesaler, warehouses, petrol stations, retail-shops and others by an end consumer. Both, OES and IAM distribution are included. The share between OES and IAM is based on where the parts have been bought by the end consumer, NOT where the parts have been fitted and also NOT where the parts have been sourced. Also included are parts used during warranty work. All figures are from the year 2007.

7.1 Mechanical replacement parts

Mechanical replacement parts describe wearing parts like brake pads, clutches, shock absorbers.

7.2 Electrics/electronics incl. lighting

Electrics and electronics describe parts like the engine control unit, the ABS control unit, any other control units, the relays, cables, the complete lighting including the bulbs, starters, electric generator.

7.3 Body parts

Body parts describe parts like the mudguards, engine bonnets, the car body, doors, bumpers etc.

7.4 Assemblies

Assemblies describe parts like engine, gear boxes, axles, etc.

7.5 Tires

Only new tyres excluding used and retreaded tyres

7.6 Oil / lubricants

This includes all oils and lubricants (for engines, gearboxes, axles, etc) which have been sold during maintenance and repair jobs as well as in petrol stations and warehouses etc. directly to end consumers.

7.7 Paint

This includes paint and pre materials like body filler.

7.8 Other chemicals

Other chemicals mean chemicals like antifreeze-liquids, polish, cleaning products, brake fluid etc.

7.9 Accessories

This means parts like hi-fi/multimedia, navigation, connectivity, interior accessories, tuning parts (Alloy rims, reequipping tires, exhaust, chassis, aerodynamics), safety accessory, comfort accessory, transport accessory like roof boxes, luggage racks, tow bars

7.10 Auto glass

The product group auto glass includes windscreens, side and rear windows.

The following table shows the total aftermarket volume split by the ten groups mentioned above.

| product group | total turnover in mio. € | share of total | share OES | share IAM |
|--|--------------------------|----------------|-----------|-----------|
| mechanical replacement parts | | | | |
| electrics / electronics incl. lighting | | | | |
| body parts assemblies | | | | |
| tires | | | | |
| oil / lubricants | | | | |
| paint | | | | |
| other chemicals | | | | |
| accessories | | | | |
| auto glass | | | | |
| total | | | | |

Table 23: Aftermarket volume in euro in Germany 2007

8 Annex – company profiles

There are about 160 short profiles for the German market. For other countries there are about 80 profiles in average per country.

8.1 OES distribution

| | |
|---------------------|--|
| name | |
| belongs to | |
| street | |
| zip-code | |
| city | |
| phone | |
| fax | |
| email | |
| internet | |
| contact person | |
| turnover in mio. € | |
| number of outlets | |
| number of employees | |

8.2 IAM Trade and buying groups

8.2.1 IAM specialised trade and buying groups

8.2.2 IAM autocentre chains

8.2.3 IAM Marketing systems for small distributors of automotive components

8.2.4 IAM Large distributors of automotive components

8.2.5 IAM Specialized Distributors

8.2.6 IAM direct distributors

8.2.7 IAM e-commerce distributors / providers

8.2.8 IAM other distribution channels

8.3 IAM repairer

8.3.1 IAM fast fit chains

8.3.2 IAM full service garage marketing systems

8.3.3 IAM full product orientated garage marketing systems /chains

8.3.4 IAM other specialized systems/programs