



The automotive aftermarket in
Germany
- extended version -

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1 Introduction

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

Methodology

The content of this study about the European Car Aftermarket has been assembled from interviews and workshops with market experts in the researched countries, results of desktop research, online – questionnaires filled by market participants and the Wolk Aftersales database. All steps have been guided by the aftermarket experts of the consultancy Wolk & Partner.

Definitions

The automotive aftermarket 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 sector. That means nearly no company mentioned in this report is specialised in passenger cars only.

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

The turnover figures relate to the sales made by surveyed companies to third parties. The number of outlets means always the summation of the headquarter and the subsidiaries of a company

Abbreviation

Short overview about the most abbreviations in this report:

IAM	Independent Aftermarket
OES	Original Equipment Service
LCV	Light commercial vehicle
HCV	Heavy commercial vehicle
B2C	Business to costumer
B2B	Business to business
€	Euro
M.	million (1.000 x 1.000)
bn.	billion (1.000 x 1.000.000)
n.a.	not available



2 General information about Germany

2.1 General data

official name	Federal Republic of Germany
name in country language	Bundesrepublik Deutschland
land borders with	Denmark, Poland, Czech Republic, Austria, Switzerland, France, Luxembourg, Belgium, the Netherlands
capital city	Berlin
EU – member	Yes, since 25th of March
area in km ²	357.021
population	82.217.800
currency	Euro
time zone	Winter (UTC+1), Summer (UTC+2)
internet TLD	.de
calling code	+49
government	Federal Parliamentary republic
federal Chancellor	Angela Merkel

Table 1: General data



Illustration: Germany in Europe

2.2 Economical data

GDP in €	2.423,8 bn
GDP growth	2,9%
GDP per capita in €	29.464
inflation rate	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 31.12.2006 and 31.12.2007

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: Passenger car fleet in Germany at the 31.12.

3.2 Passenger car fleet by brand

brand	2007
Alfa Romeo	
Audi	
BMW, Mini	
Chevrolet	
Chrysler, Jeep, Dodge	
Citroen	
Daihatsu	
Ferrari	
Fiat	
Ford	
General Motors	
Honda	
Hyundai	
Iveco	
Jaguar	
Kia	
Lada	
Lancia	
Land Rover	
Maserati	
Mazda	
Mercedes	
MG Rover, Austin	
Mitsubishi	



VEHICLE FLEET

EXAMPLE REPORT



Nissan	
Opel	
Peugeot	
Porsche	
Proton	
Renault, Dacia	
Saab	
Sachsenring	
Seat	
Skoda	
Smart	
Ssangyong	
Subaru	
Suzuki	
Toyota, Lexus	
Volvo	
VW	
others	
total	

Table 4: Passenger car fleet by brand at the 01.01.2008

3.3 Truck fleet (incl. LCV)

	2006	2007
registered trucks		
first registrations		
production of trucks		
light trucks (up to 6 t)		
- DaimlerChrysler		
- Ford		
- Multicar		
- Volkswagen		
medium / heavy trucks		
- DaimlerChrysler		
- IVECO-Magirus		
- MAN		

Table 5: Truck fleet in Germany at the 31.12.

3.4 Bus fleet

	2006	2007
registered buses		
first registrations		
production of buses		
- EvoBus		
- MAN		
- NEOPLAN		

Table 6: 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 M. €	employees
car manufacturer owned outlets			
offering sales and service			
offering only service			
offering only sales			
total			

Table 7: OES outlets and employees 2007 (turnover + employees estimated)

In Germany there are approximately Fehler! Verweisquelle konnte nicht gefunden werden. manufacturer or importer owned outlets. In addition there are about Fehler! Verweisquelle konnte nicht gefunden werden. franchised car dealers with a garage, circa Fehler! Verweisquelle konnte nicht gefunden werden. dealers without a garage and Fehler! Verweisquelle konnte nicht gefunden werden. authorised repairers, who are not selling cars.

The turnover given for the car manufacturer or importer owned outlets is only the B2C share. The B2B share is not available.

4.2 OES car trade and buying groups

kind of outlet	associates	no. of outlets	turnover in M. € 1)
ANAG			
APM			
Igedos			
Techno			
total			

Table 8: OES car trade and buying groups 2007

1) = only in the headquarter

4.3 OES Garage marketing systems

kind of outlet	no. of outlets
Renault Minute ¹⁾	
Peugeot Rapide ¹⁾	
Stop & Go (VW) ²⁾ -autocentre-	
total	

Table 9: OES garage marketing systems

- 1) Integrated in authorized car dealers
- 2) Stop & Go belongs to VW and behaviours like A.T.U. That means Stop & Go is some kind of autocentre concept (compare chapter 5.3).



4.4 Largest car dealer groups

All data about the dealer group is given for the whole company, including business abroad.

name	turnover in M. €
Auto-Staiger	
AVAG	
Cloppenburg	
DAH	
Edgar Kittner	
Ernst Dello	
Fahrzeug-Werke Lueg	
Feser und Graf	
Gottfried Schultz	
Hahn	
Kamps-Gruppe	
MAHAG	
Wellergruppe	
total	

Table 10: The largest car dealers by turnover, figures include business abroad



5 Structure of IAM distribution

This chapter describes the distribution flow from the automotive parts wholesalers / distributors, to the repairers, to the end consumers. The mass merchandisers are not included in this chapter because it was impossible to separate the turnover made with automotive parts from the turnover made with other products like food or building material.

5.1 Trade and buying groups

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

- ad International
- ATR International
- GAU International
- Temot International

name	European mother asso- ciation	turnover in M. €	outlets
ATEV			
ATR			
CAR			
CARAT (excl. Heil & Sohn)			
Carprofi			
Centro/VMA ¹⁾			
Coparts (Incl. Heil & Sohn)			
Karo S			
Select AG			
Temot			
total			

Table 11: Trade and buying groups 2007

1) VMA = Same associates as Centro excluding KSM.

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. ¹⁾

name	specialisation	turnover in M. €	outlets
EFR			
Eurogarant Auto Service			
FRI			
Innovation Group			
Reifenpartner point S			
Top Service Team			

Table 12: Specialised Tradegroups



5.3 Autocentres

Autocentres are retailers with integrated car service, selling to end consumers. Attention: Autocentres are not to be confused with Fast Fits and are also not specialised car services (like in tyres, glass, climate service, etc.)

name	outlets
A.T.U	
Afra ¹⁾	
ATOS ¹⁾	
AUTO plus (Carat) ¹⁾	
Autopartner ¹⁾	
Boxenstop ¹⁾	
Coparts Plus ¹⁾	
MOTOO ¹⁾	
PV TVP ¹⁾	
Trost TVP ¹⁾	
total	

Table 13: Autocentre chains 2007

1) only outlets which includes auto service are counted

5.4 Retail chains

National retail chains sell auto parts and accessories to end consumers. They do not offer any auto service.

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

5.5 Marketing systems for small distributors

name	outlets
Autopartner (ATR-Service GmbH) ¹⁾	
AUTO plus (Carat) ¹⁾	
Carprofi (Carprofi HandelsgmH) ¹⁾	
Coparts Plus (Coparts) ¹⁾	
KAT (Hengstenberg) ¹⁾	
Motoo (Hans Hess Autoteile GmbH) ¹⁾	
PV TPV (PV Automotive) ¹⁾	
Trost TVP (Trost) ¹⁾	

Table 14: Marketing systems for small distributors

1) only outlets without auto service are counted



5.7 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 such as e.g.:

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

The large specialised distributors in Germany are:

name	specialisation	outlets
AGC Automotive Replacement Glass	auto glass	
Autoteile Post GmbH	France cars parts	
Christian Winkler GmbH & Co KG	truck parts	
Europart Holding GmbH	truck parts	

Table 17: Selection of large specialised distributors in Germany 2007

5.8 Direct distributors

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

name	total turnover in M. € (worldwide)
Adolf Würth	
Albert Berner	
Innotec	

Table 18: Most important direct distributors 2007



5.9 Rack jobber

Rack jobbers are companies which deliver wearing parts and accessories to gas stations, warehouses and / or specialist retail shops. They rent racks in these distribution channels and fill them by themselves. None has a business mainly consisting of the delivery of automotive parts.

name	total turnover in M. €
Lekkerland	
Stinnes Intertec	

Table 19: Large rack jobbing companies in Germany

5.10 E-Commerce companies

E-Commerce companies are dealing with automotive part mainly via the internet. Main share of customers are end consumer, main activity consist in selling automotive parts via the internet.

In Germany the following companies are e-commerce companies.

name

Table 20: E-Commerce companies in Germany 2007

6 IAM repairers

This chapter is about IAM repairers. Please note that there are NO garages owned by fleets, large companies or communes included. Only independent stand-alone garages / workshops are counted. The number of outlets is given by experts / garage associations, the number of employees and the turnover is in the most cases extrapolated with average figures given by experts of the country.

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

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

Table 21: Overview about the independent repairers in Germany 2007

6.1 Multi brand garages

There are approximately Fehler! Verweisquelle konnte nicht gefunden werden. independent multi brand garages in Germany. These garages have made a total turnover of Fehler! Verweisquelle konnte nicht gefunden werden. million € in the year 2007.



6.2 Specialists

There are approximately **Fehler! Verweisquelle konnte nicht gefunden werden.** garages specialised in car repairs. These companies made a turnover of approximately **Fehler! Verweisquelle konnte nicht gefunden werden.** million € in 2007.

specialisation	number of outlets	turnover in mio €	employees
auto glass specialists			
body and paint shops			
engine remanufacturers / reconditioner			
specialist in electrics/electronics/diesel			
specialists in climate service			
tyre specialists			
other specialists not listed above (mobile fitters, car care etc.)			
total			

Table 22: 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 tyres including service. They may also provide brakes, exhausts, oil, shock absorber and air conditioning.

name	number of outlets	turnover in M. €	number of employees
Pit-Stop			

Table 23: Fast fit chains in Germany



6.4 Garage marketing systems

The garage marketing systems are partner systems driven by buying groups, wholesalers or parts manufactures. The number of garage marketing system partners is already included in the number of IAM repairers above mentioned. They are divided into two groups. The full service systems which offer the complete service for all brands and the product orientated systems which are specialised in single product groups such as tyres, auto glass and air conditioning. The distance retail brands of the parts industry such as OSS/ZF Trading are not included in this report. Most of garage marketing systems are based on partnership-contracts and are only in a few cases based on "real franchising".

6.4.1 Fullservice garage marketing systems

name	outlets
1a autoservice	
AC Auto Check	
total	

Table 24: Fullservice garage marketing systems 2008



7 Aftermarket volume

The Aftermarket volume includes the entire turnovers of new or rebuilt components (but **not** used components) after the purchase of a new passenger car. The value is shown in € at 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 as well as the material which is bought at a garage, a wholesaler, warehouses, petrol stations, retail-shops and other distribution channels 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 refer to the year 2007.

7.1 Mechanical replacement parts

Mechanical replacement parts include wearing parts such as brake pads, clutches, shock absorbers.

7.2 Electrics/electronics

Electrics and electronics include parts such as the engine control unit, the ABS control unit, any other control units, the relays, cables, bulbs, starters, electric generator.

7.3 Body parts incl. lighting

Body parts include parts such as the mudguards, engine bonnets, the car body, doors, bumpers, head- and rear lamps etc.

7.4 Assemblies

Assemblies include parts such as engine, gear boxes, axles, etc.

7.5 Tyres

Only new tyres are taken in account, used and retreaded tyres are excluded.

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 such as body filler.

7.8 Other chemicals

Other chemicals refer to chemicals such as antifreeze-liquids, polish, cleaning products, brake fluid etc.

7.9 Accessories

Accessories include parts such as hi-fi / multimedia, navigation, connectivity, interior accessories, tuning parts (alloy rims, exhausts, chassis, aerodynamics), safety accessory, comfort accessory, transport accessory such as 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 above mentioned ten groups. Attention: Only material, **NO** labour! Share between OES and IAM is.

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

Table 26: Aftermarket volume in € in Germany 2007

Shares between OES and IAM are estimated by market experts and market participants. Shares show where the material has been built in, NOT where the material has been sourced.

8 Comparison of Germany vs. Europe

The following table shows important indicators of the automotive market in relation to the other 24 analysed countries.

	Germany	Europe	share in %
passenger cars - units			
aftermarket volume - €			
OES - outlets			
IAM garages - outlets			
IAM distributors - companies			
there from small in %			
there from medium in %			
there from large in %			
passenger cars per 1.000 inhabitants			

Table 27: Relation figures Germany vs. Europe 2007



9 Company profiles

This is only a selection of profiles. In the real study about the German market are more than 140 profiles.

1 OES company profiles

1.1 OES car trade and buying groups

name	ANAG	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 1: ANAG

1.2 OES garage marketing systems

name	Peugeot Rapide	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 2: Peugeot Rapide

1.3 OES large car dealer groups

name	Auto-Staiger GmbH	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		
brands		

Profile 3: Auto-Staiger GmbH



2 IAM company profiles

2.1 IAM trade and buying groups

name	ATEV	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		
associates		

Profile 4: ATEV

2.2 IAM autocentres

name	A.T.U	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 5: A.T.U

2.3 IAM small distributors – marketing systems

name	AUTO plus	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 6: AUTO plus



2.4 IAM large distributors

name	A.-W. HEIL & SOHN GmbH & Co. KG	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 7: A.-W. HEIL & SOHN GmbH & Co. KG

2.5 IAM specialised distributors

name	AGC Automotive Replacement Glass	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		
specialised in		

Profile 8: AGC Automotive Replacement Glass

2.6 IAM direct distributors

name	Adolf Würth GmbH	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 9: Adolf Würth GmbH



2.7 IAM e - commerce companies

name	AutoScout24 Deutschland GmbH	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 10: AutoScout24 Deutschland GmbH

3 IAM repairer profiles

3.1 IAM garage marketing systems - full service

name	1a autoservice	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		

Profile 11: 1a autoservice

3.2 IAM garage marketing systems - product orientated

3.2.1 accident management systems

name	Global automotive Service GmbH	
belongs to		
street		
postal code		
town		
phone		
fax		
contact person		
email		
internet		
turnover in M. €		
outlets		
staff		
specialised in		

Profile 12: Global automotive Service GmbH

This is only a selection of profiles. In the real study about the German market are more then 140 profiles.