



Databook

GARAGE STRUCTURE IN THE EUROPEAN CAR AFTERMARKET 2018

IMPRINT

RESPONSIBLE:

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Bergisch Gladbach, in December 2018

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1. INTRODUCTION

This release of the databook "Garages Structure in Europe 2018" gives a comprehensive overview of the Garage landscape in 35 European countries. Garages are split into IAM and OES and 6 IAM garage and 4 garage concept types. You will find detailed information for the largest Garage service concepts in the European Car Aftermarket and rankings of the most important Concepts in each country.

The databook is divided into a European part with the number of garages, garage density and IAM/OES split and into a national chapter with 35 country overviews. In both chapters you will find the largest Garage service concepts (Europe and countries).

Content overview:

- structure of automotive garages
- garage density
- concepts density
- information about garages and concepts for 6 garages types
 - mechanical garages
 - body and paint garages
 - tyre dealers
 - auto glass specialists
 - others (Mobile fitters, Car care...)*
 - fast fitters*

**) only number of garages*

Methodology

The content of this study has been assembled from expert interviews and workshops with the market specialists in the researched countries, results of desktop research, online – questionnaires filled by market participants, and the wolk after sales database. All steps have been guided by the aftermarket experts of the consultancy wolk after sales experts.

The whole databook is mainly about garages/concepts for passenger cars.



Sources

This databook is based on various open sources such as official statistics and other publications as well as interviews with the market experts. All data is researched with our best knowledge and belief. The data was researched in 2014.

1.1 DEFINITIONS

OES and IAM

The automotive aftermarket is divided in two fields. On the one hand the companies which belong to the car manufacturers' (OES) networks, on the other hand the companies which are independent from the car manufacturers (IAM). The data presented in this databook concerns mainly passenger cars.

Garage types

Mechanic garages

Mechanic garages are full service multiband garages which offer service for passenger cars. Please note that mechanic garages are not specialised garages (such as in tyres, glass, climate service, etc.). Mechanical replacement repairs/parts include wearing parts such as brake pads, clutches, shock absorbers.

Body and paint garages

Body and paint garages are IAM full service multiband garages which mainly offer body and paint repairs. Please note that in this group included garages which make more than 50 % of the turnover with body and repair work. Body parts repairs/include parts such as the mudguards, engine bonnets, the car body, doors, bumpers, head- and rear lamps etc.

Auto glass specialists

Auto-glass specialists are IAM full service multiband garages which mainly offer auto glass change and repairs. Please note that in this group included garages which make more than 50 % of the turnover with auto glass. Auto glass includes windscreens, side and rear windows



Fast Fit/concepts

Fast Fit chains offer a lean service (lower half services) for passenger cars. They mostly offer tyres also including service. They may also provide brakes, exhausts, oil, shock absorber and air conditioning.

Other IAM specialists

Garages which are specialised in electrics/electronics, air condition specialises garages, engine remanufacturing or other specialists not listed above (mobile fitters, car care etc.).

Auto centres/concepts (not part of study)

Auto centres are retailers (B2C) with integrated car service, selling to end consumers. Please note that auto centres are not to be confused with Fast Fits and are also not specialised car services (such as in tyres, glass, climate service, etc.).

Auto centres are not part of this databook. If you need more information, please contact us.

Concept types

Garage service concepts or Garage marketing systems:

The garage service concepts or garage marketing systems are partner systems driven by buying groups, wholesalers, parts manufacturers or others. The main aim is to increase the purchase loyalty of garages to the system disposer. The number of service concept partners is already included in the number of IAM repairers/garages above mentioned. They are divided into three main groups. The mechanical garages which offer the full service for all brands, the garage concepts for specialized repairers (product orientated systems) which are specialized in single product groups such as tyres, auto glass and body paint and fast fitter which offer fast fit parts such as tyres, exhausts, and brakes.

Most garage marketing systems are based on partnership-contracts and are only in few cases based on "real franchising".

In this databook we describe concepts of four major groups:

mechanic concepts - the full-service concepts for mechanic repairs which offer the complete service for all brands such as Bosch Car Service, AUTOFIT, etc.

body and paint concepts - service concepts for specialised body and paint repair (product orientated concept) such as Five Star, Acoat Selected, etc.



tyres concepts - service concepts for specialised tyre repairs (product orientated concept) such as Premio, Euromaster, etc.

auto glass concepts - service concepts for specialised auto glass repairs (product orientated concept) such as Carglass.

Please note: in this databook we do NOT describe concepts like garage distance retail brands of the parts industry such as Protech, Bosch Diesel Center, Delphi service center etc.



3. AUTOMOTIVE GARAGE STRUCTURE IN EUROPE

3.1 SUMMARY GARAGE STRUCTURE IN EUROPE

82 % of the garages in Europe are IAM garages. 35 % of them are specialized in tyres, auto glass, body and paint, fast fitter or other specializations. Mechanical repairers represent the largest part with 47 %.

The average IAM garage density in Europe, which describes the number of passenger cars per garage, is 889 cars per garage. Germany has the highest density with more than 1.400 cars per garage followed by the United Kingdom which exceeds 1.300 cars per garage.

The lowest density among the 35 analyzed countries in Europe has Macedonia with around 390 cars per garage. Slovenia, Turkey, Latvia and Albania show slightly above 400 cars per garage.

We also see disparities between the regional clusters. While the garage density in Central Europe (DACH, BeNeFrance and UK) is above 1.000 cars per garage, the density in the Eastern Mediterranean countries, the Balkan states and the Baltics does not reach 600 cars per garage.

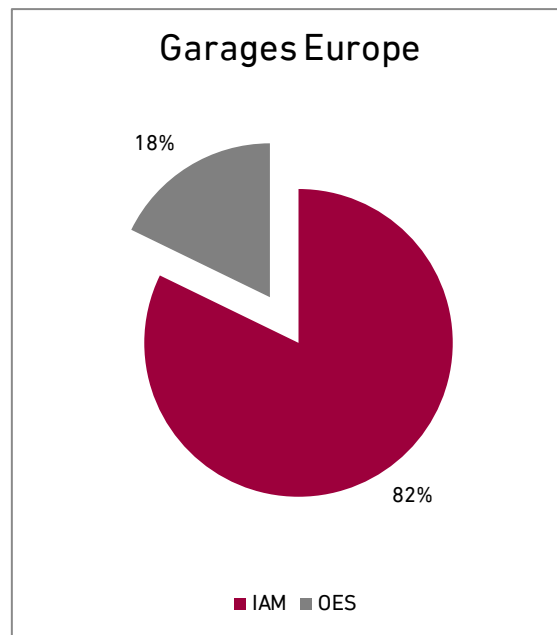


3.2 AUTOMOTIVE GARAGE STRUCTURE IN EUROPE

3.2.1 OVERVIEW OF GARAGES IN EUROPE 35

Type of Garage	Number of Garages Europe	Share of OES/IAM and total Europe	Garage Density Europe
OES			
IAM			
Auto glass specialists			
Body and paint shops			
Fast fitter			
Multi brand mechanic garages			
Others (Mobile fitters, Car care...)			
Tyre specialists			
Total Garages (OES + IAM)			

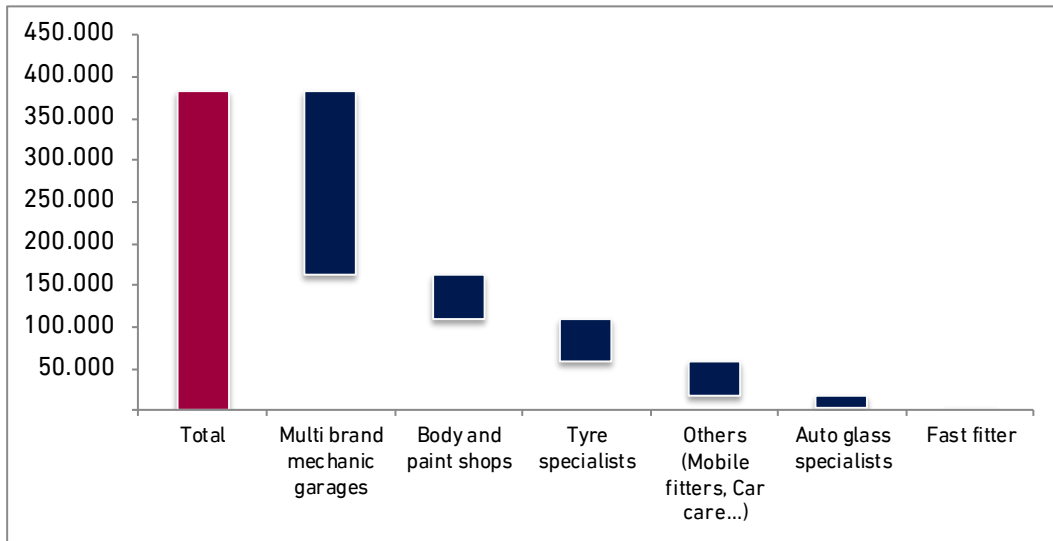
TABLE 2: OVERVIEW OF GARAGES IN EUROPE



PICTURE 3: IAM GARAGES / OES GARAGES IN EUROPE

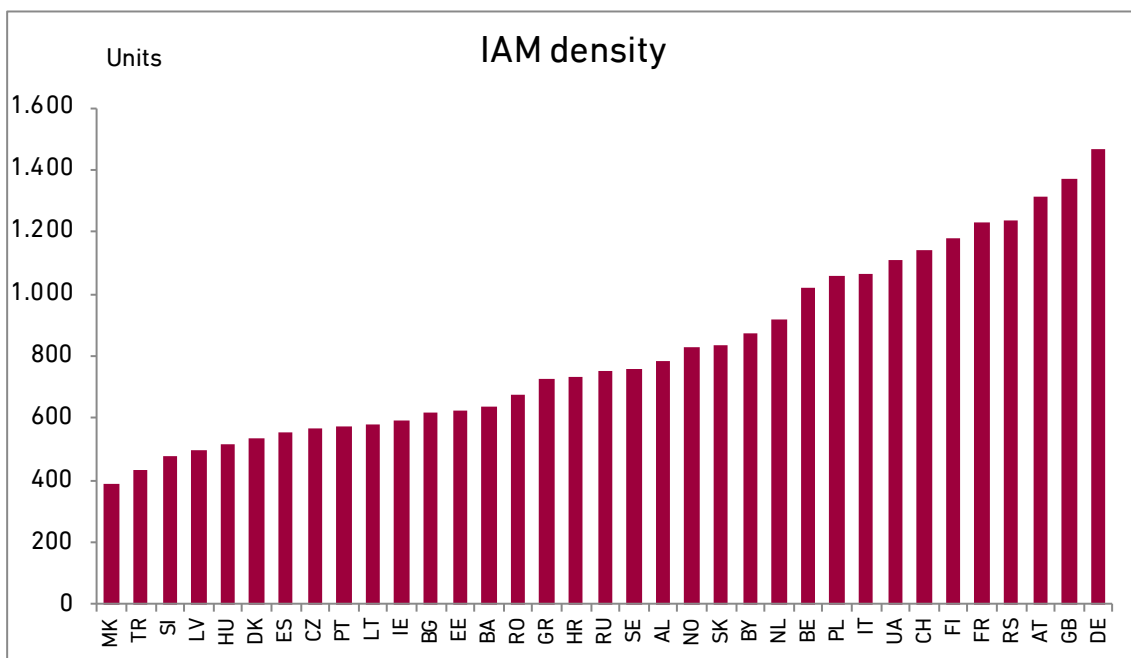


3.2.1.1 BREAKDOWN OF IAM GARAGES IN EUROPE 35

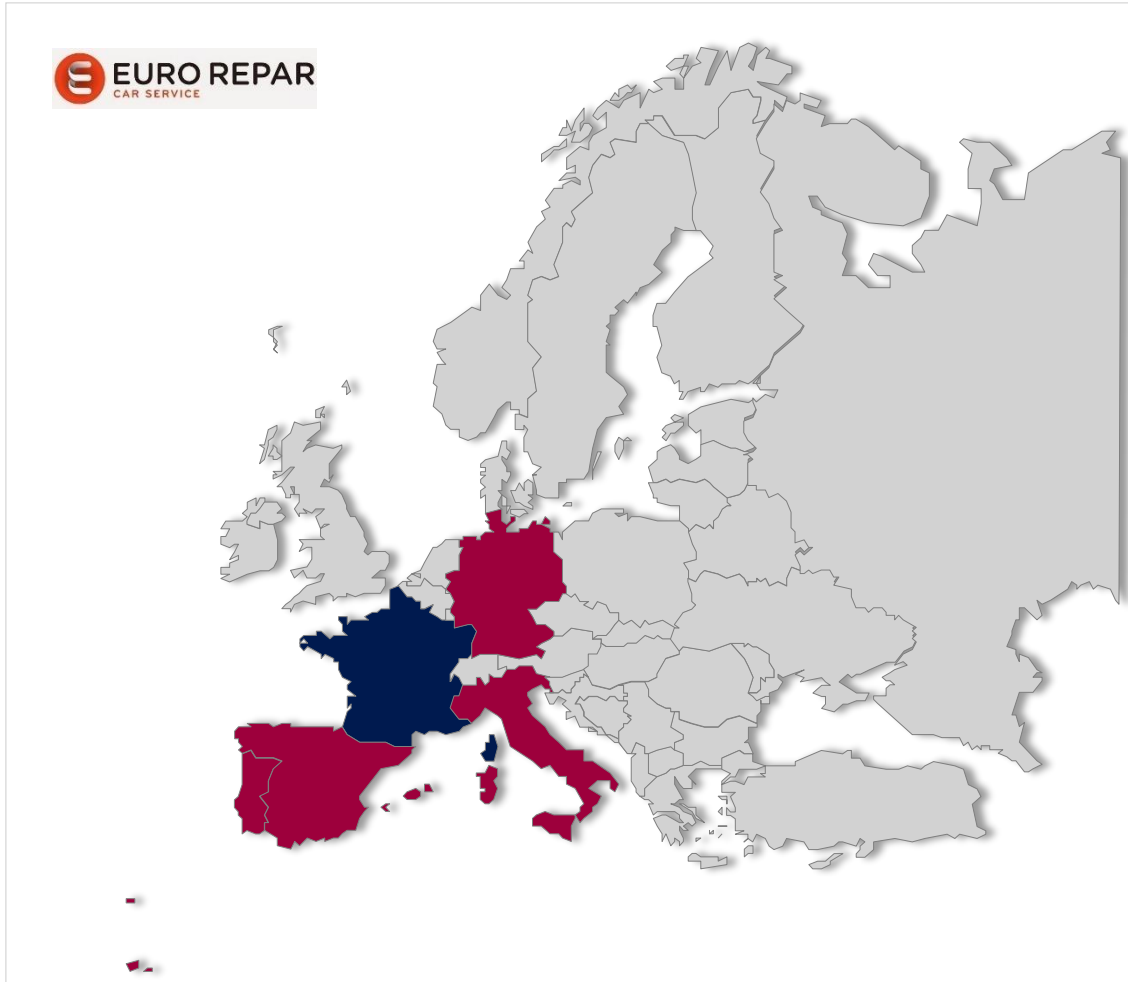


PICTURE 4: BREAKDOWN OF IAM GARAGES IN EUROPE

3.2.1.2 BREAKDOWN OF IAM DENSITY IN EUROPE 35



PICTURE 5: IAM DENSITY IN EUROPE



Company	Country	Outlets (year)
Euro Repar Car Service (Eurorepar)	France	x (2018)
Eurorepar Car Service (Eurorepar)	Germany	x (2018)
Euro Repar Car Service (Eurorepar)	Italy	x (2018)
Eurorepar	Portugal	x (2018)
Euro Repar Car Service (Eurorepar)	Spain	x (2018)
total		

TABLE 11: GARAGE MARKETING SYSTEM: EURO REPAR CAR SERVICE (EUROREPAR)



4.4 AUTOMOTIVE GARAGE STRUCTURE IN BELGIUM

4.4.1 OVERVIEW OF GARAGES IN BELGIUM

Type of Garage	Number of Garages Belgium	Share of OES/IAM and total	Garage Density Belgium
OES			
IAM			
Auto glass specialists			
Body and paint shops			
Fast fitter			
Multi brand mechanic garages			
Others (Mobile fitters, Car care...)			
Tyre specialists			
Total Garages (OES + IAM)			

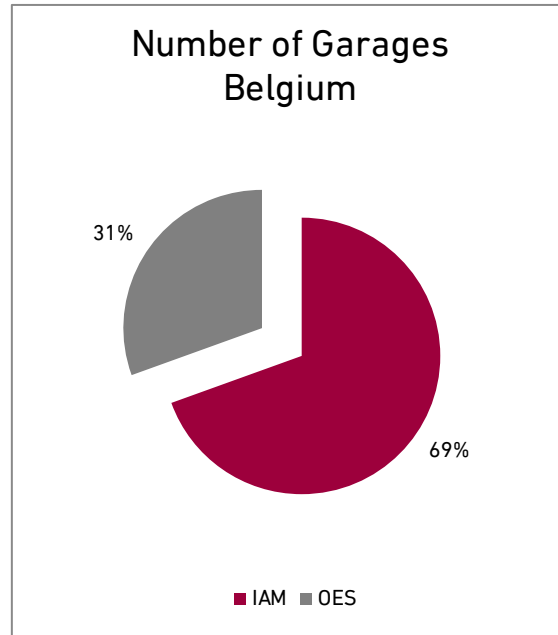
TABLE 89: OVERVIEW OF GARAGES IN BELGIUM

Type of Garage	Market share Belgium	Market share Europe	Market share Europe Top 5	Market share Cluster
OES				
IAM				
Multi brand mechanic garages				
Body and paint shops				
Others (Mobile fitters, Car care...)				
Tyre specialists				
Auto glass specialists				
Fast fitter				
Total Garages (OES + IAM)				

TABLE 90: MARKET SHARE COMPARISON: BELGIUM VS. EUROPE 34 VS. EUROPE TOP 5 VS. CLUSTER

Type of Garage	Garage Density Belgium	Garage Density Europe	Garage Density Europe Top 5	Garage Density Cluster
OES				
IAM				
Multi brand mechanic garages				
Body and paint shops				
Others (Mobile fitters, Car care...)				
Tyre specialists				
Auto glass specialists				
Fast fitter				
Total Garages (OES + IAM)				

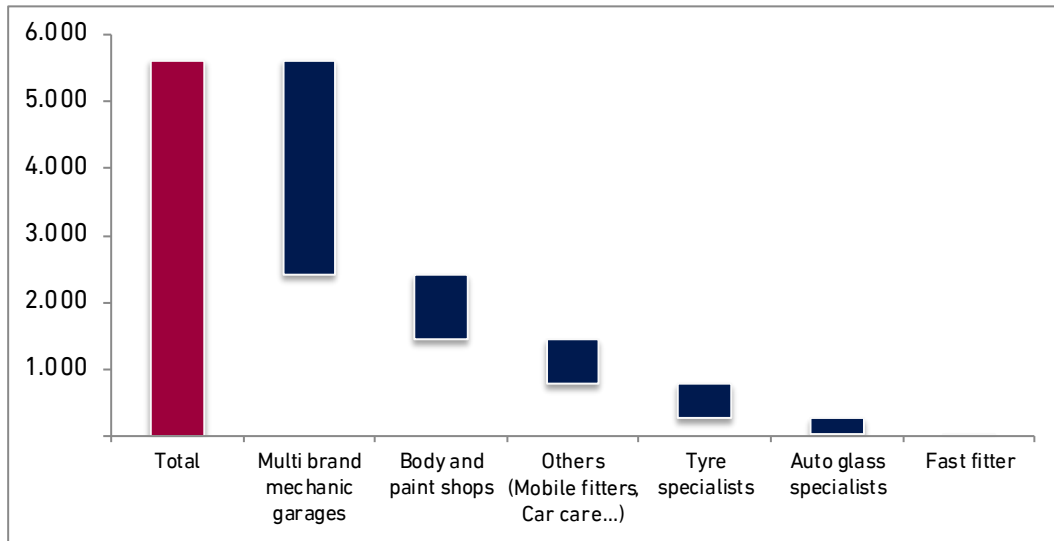
TABLE 91: DENSITY COMPARISON: BELGIUM VS. EUROPE 34 VS. EUROPE TOP 5 VS. CLUSTER



PICTURE 48: IAM TOTAL GARAGES / OES TOTAL GARAGES IN EUROPE AND BELGIUM

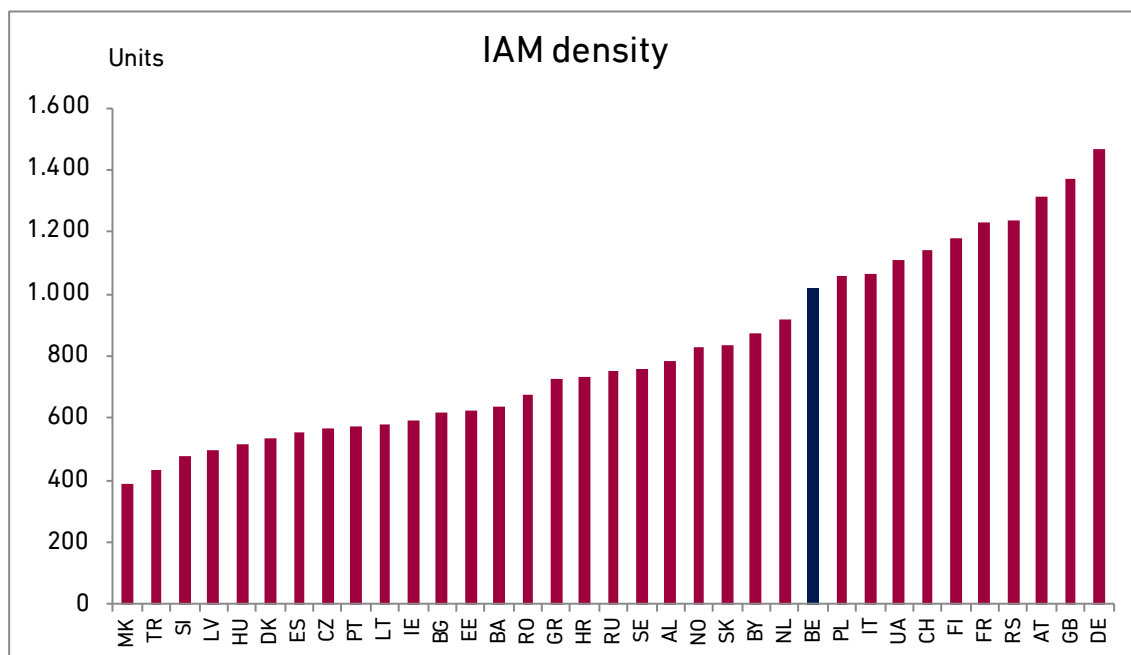


4.4.1.1 BREAKDOWN OF IAM GARAGES IN BELGIUM



PICTURE 49: BREAKDOWN OF IAM GARAGES IN BELGIUM

4.4.1.2 IAM DENSITY IN BELGIUM



PICTURE 50: IAM DENSITY IN BELGIUM