

Databook

GARAGE STRUCTURE IN THE EUROPEAN CAR AFTERMARKET 2014

IMPRINT

RESPONSIBLE:

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This project was created by wolk after sales experts gmbh to the best of our knowledge and belief and with all due diligence, but without guarantee.



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1. INTRODUCTION

This release of the handbook "Garage Structure in the European Car Aftermarket 2014" gives a comprehensive overview of the garage landscape in 34 European countries. The workshops are split into IAM and OES. This report covers six important types of garage such as mechanic, body and paint, auto glass, fast fit, tyre and others (mobile fitters, car car etc.). Furthermore, four service concepts were classified in this study: mechanic, body and paint, tyres and finally auto glass.

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.

This handbook is divided both into a European part under specification of the number of garages, garage density and IAM/OES split, and into a national part with 34 country overviews. In both sections you will find the largest garage service concepts for Europe and single countries.

Content overview:

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

**) only number of garages*



1.1 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 handbook 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 and refers mostly to 2013.

1.2 DEFINITIONS

OES and IAM

The automotive aftermarket is divided into two sections. 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 multibrand garages which offer service for passenger cars. Mechanic garages are not specialized 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. This group includes 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. This group includes 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 fast fit parts such as tyres also including service. They may also provide brakes, exhausts, oil, shock absorber and air conditioning.

Other IAM specialists

Other IAM specialists are such garages which are specialized in electrics/electronics, air condition, engine remanufacturing or other specialists not listed above (mobile fitters, car care etc.).

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 offer the full service for all brands. The garage concepts for specialized repairers (product orientated systems) are specialized in single product groups such as tyres, auto glass and body paint. Fast fitters 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 e.g. Bosch Car Service, AUTOFIT, etc.

body and paint concepts - service concepts for specialized body and paint repair (product orientated concept) e.g. Five Star, Acoat Selected, etc.

tyres concepts - service concepts for specialized tyre repairs (product orientated concept) e.g. Premio, Euromaster, etc.

auto glass concepts - service concepts for specialized auto glass repairs (product orientated concept) e.g. Carglass.

We do NOT observe concepts like garage distance retail brands of the parts industry such as Protech, Bosch Diesel Center, Delphi service center etc. in this handbook.

Density

Car density: number of passenger cars per 1.000 people.

Garage density: number of passenger cars per garage.



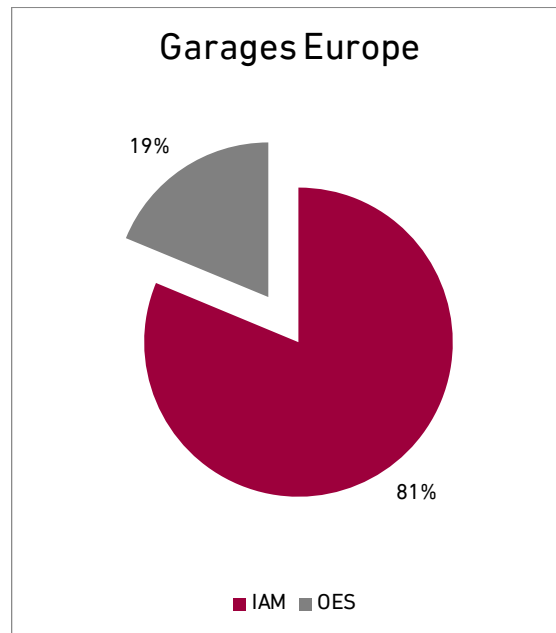
2. AUTOMOTIVE GARAGE STRUCTURE IN EUROPE

The European part of this Databook is divided into 3 chapters. The Europe 34 chapter describes the garage landscape in 34 countries of the European continent. The Europe top 5 part sums up all data of the most important markets in Europe. Finally all 34 countries are separated into 10 country clusters.

2.1 OVERVIEW OF GARAGES IN EUROPE 34

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

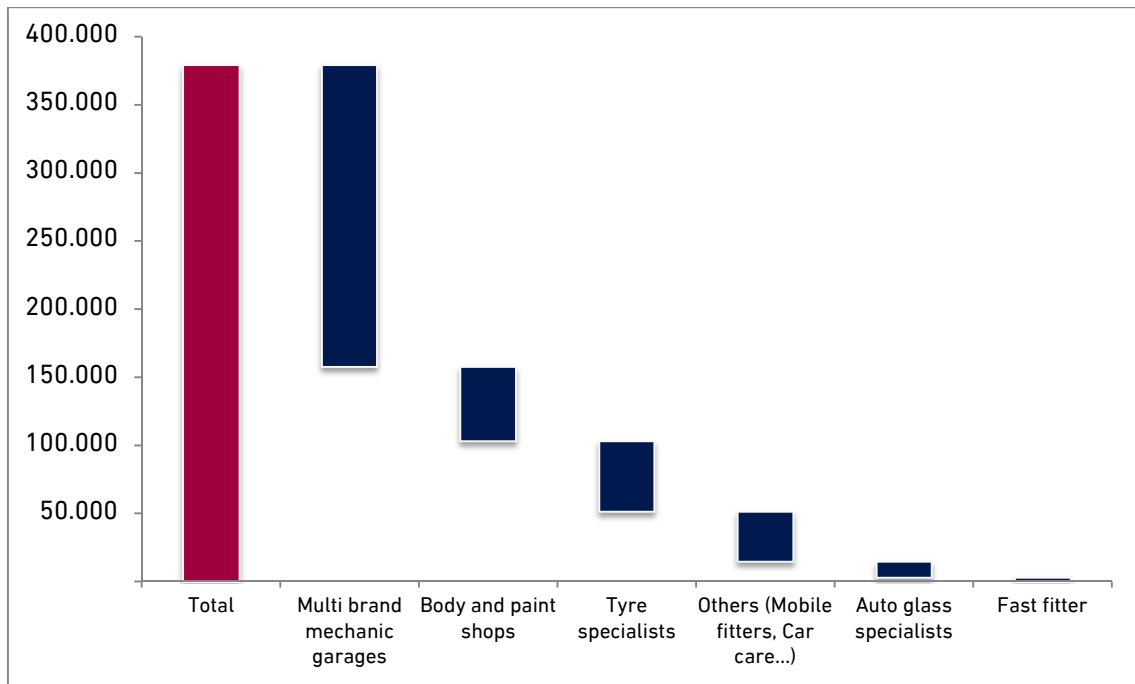
TABLE 1: OVERVIEW OF GARAGES IN EUROPE



PICTURE 1: IAM GARAGES / OES GARAGES IN EUROPE

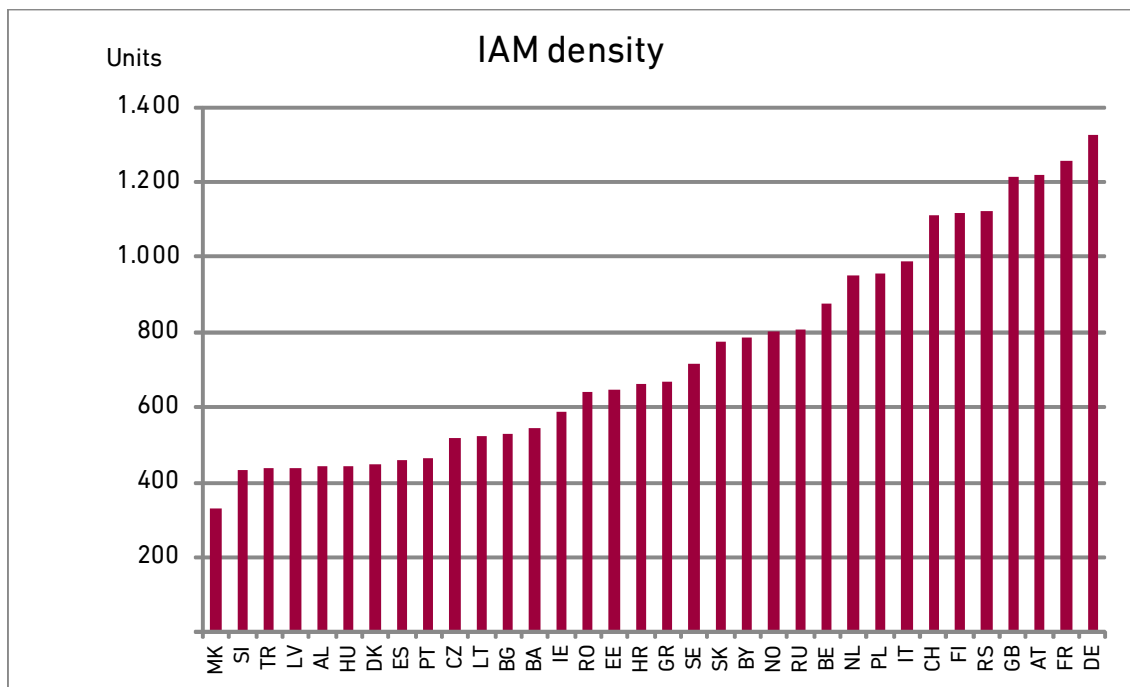


2.1.1 BREAKDOWN OF IAM GARAGES IN EUROPE 34



PICTURE 2: BREAKDOWN OF IAM GARAGES IN EUROPE

2.1.2 IAM DENSITY IN EUROPE 34



PICTURE 3: IAM DENSITY IN EUROPE



2.2 IAM GARAGE SERVICE CONCEPTS IN EUROPE

2.2.1 IAM SERVICE CONCEPTS FOR MULTI BRAND MECHANIC GARAGES IN EUROPE

Type of garage	Number of Garage Concepts	Number of Outlets in Concepts	Garages per Concept	Share of Concepts
Multi brand mechanic garages	xxx	xxx	xxx	xxx %
Tyre specialists	xxx	xxx	xxx	xxx %
Body and paint shops	xxx	xxx	xxx	xxx %
Auto glass specialists	xxx	xxx	xxx	xxx %
Others	xxx	xxx	xxx	xxx %
Fast fitter	xxx	xxx	xxx	xxx %
Total IAM garages	xxx	xxx	xxx	xxx %

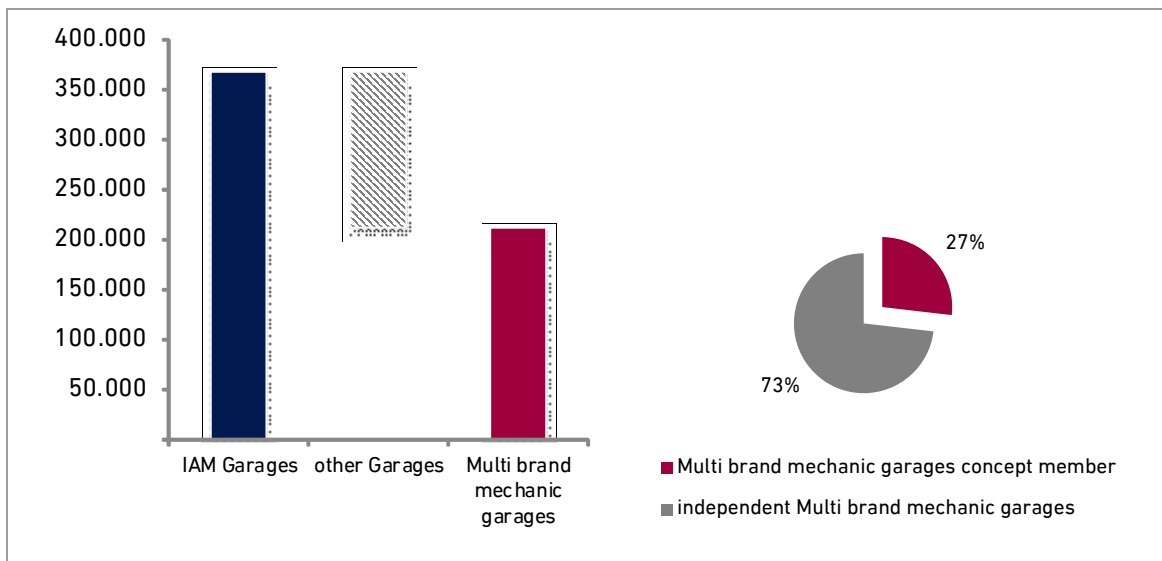
TABLE 2: OVERVIEW SERVICE CONCEPTS FOR MULTI BRAND MECHANIC GARAGES IN EUROPE

Number of Garage Concepts: Number of garage concepts in the country.

Number of Outlets in Concept: This is the number of outlets which are member of a garage concept.

Garages per Concept: This is the average number of garages which are member of a garage concept.

Concept Share: This percentage describes the share of garages belonging to a garage concept.

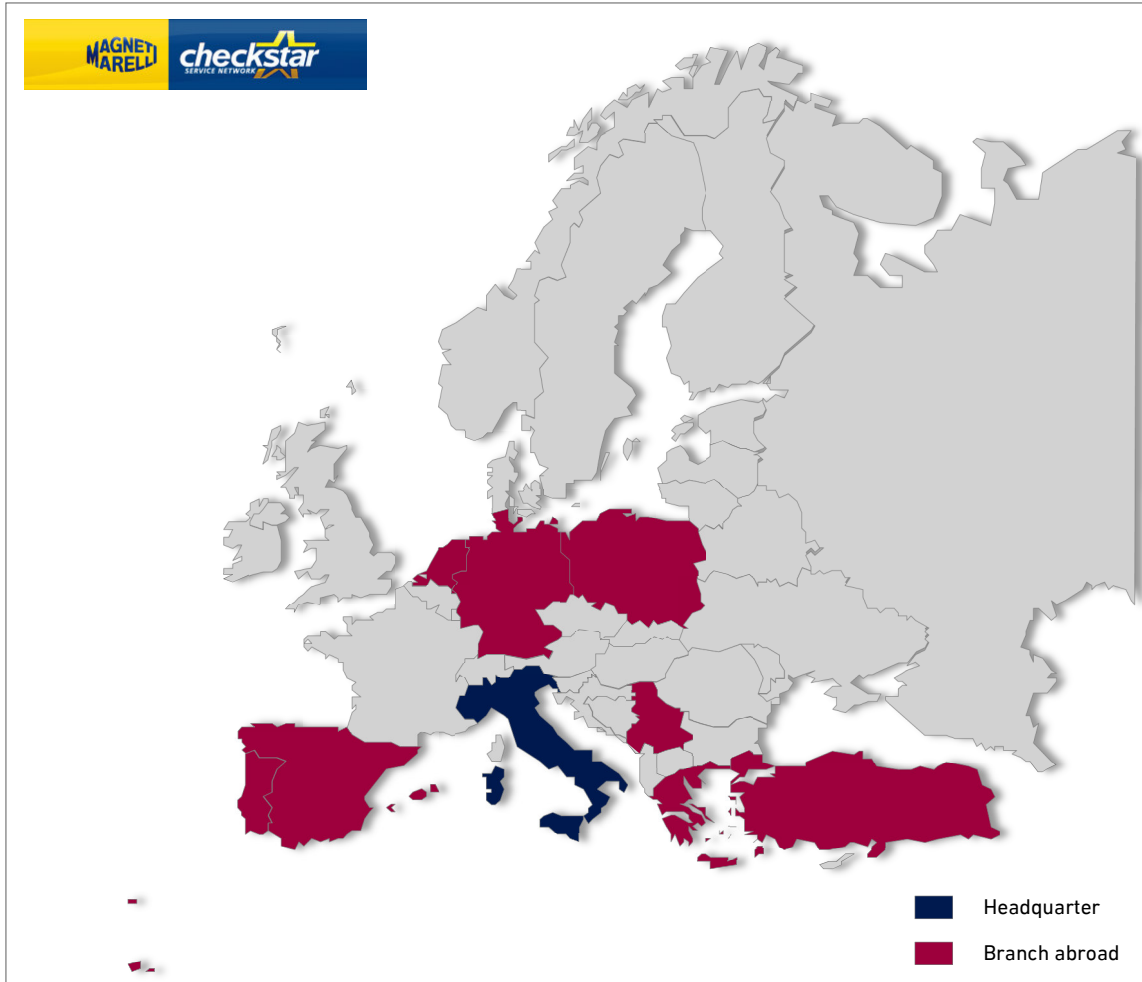


PICTURE 4: IAM SERVICE CONCEPTS FOR MULTI BRAND MECHANIC GARAGES IN EUROPE



Company	Headquarters	Disposer	Countries	Outlets
Bosch Car Service	Germany	Robert Bosch GmbH	34	xxx
EuroGarage-Top Garage	France	GROUPAUTO International	17	xxx
ad Garage	Belgium	adi Autodistribution International	14	xxx
Point Service	Italy	I.D.I.A. International Spa	1	xxx
Checkstar	Italy	Magneti Marelli Aftermarket & Service SPA	9	xxx
Trost Partner	Germany	Trost Auto Service Technik SE	2	xxx
A - Posto	Italy	RHIAG Group	1	xxx
1a autoservice	Germany	CENTRO GmbH & Co. KG	3	xxx
Euro Repar Car Service (Eurorepar)	France	Peugeot S.A. (Peugeot Citroen)	5	xxx
AUTOFIT (Trost)	Germany	Trost Auto Service Technik SE	9	xxx
Artauto / Riparauto	Italy	Artauto / Riparauto	1	xxx
AUTOteam	Germany	WM SE	1	xxx
Meisterhaft	Germany	ATR International AG	3	xxx
Motrio	France	Renault	1	xxx
Autoprimo	France	AD FRANCE	1	xxx
Giadi Service	Italy	Giadi Group	1	xxx
Mekonomen Bilverkstad	Sweden	Mekonomen AB	4	xxx
Werkstattpartner (Stahlgruber)	Germany	Stahlgruber GmbH	1	xxx
Garage AD Expert	France	adi Autodistribution International	1	xxx
Auto Mobil Meisterwerkstatt	Germany	CARAT GmbH & Co. KG	2	xxx
AC Auto Check	Germany	ATR International AG	8	xxx
Kwik-Fit	United Kingdom		3	xxx
Elit Partner	Czech Republic	RHIAG Group	3	xxx
AutoCrew	Germany	Robert Bosch GmbH	13	xxx
Auto Profi team	Czech Republic	APM Automotive	1	xxx
Unipart Car Care Centres	United Kingdom	Unipart Automotive	1	xxx
Q-Service	Poland	Inter Cars S. A.	5	xxx
Midas Europe	France		6	xxx
AutoMester	Denmark	Nordic Forum	3	xxx
Precisium (garage)	France	Precisium group	1	xxx
Meca Car Service	Sweden	Mekonomen AB	2	xxx
Total				xxx

TABLE 3: OVERVIEW MULTI BRAND MECHANIC GARAGES IN EUROPE



PICTURE 5: MAP OF GARAGE MARKETING SYSTEM: CHECKSTAR

Company	Country	Outlets (year)
Checkstar	Germany	xxx (2014)
Checkstar	Greece	xxx (2014)
Checkstar	Italy	xxx (2014)
Checkstar	Netherlands	xxx (2014)
Checkstar	Poland	xxx (2014)
Checkstar	Portugal	xxx (2014)
Checkstar	Serbia	xxx (2014)
Checkstar	Spain	xxx (2014)
Checkstar	Turkey	xxx (2014)
Total		xxx

TABLE 4: GARAGE MARKETING SYSTEM: CHECKSTAR



3. AUTOMOTIVE GARAGE STRUCTURE IN EUROPEAN COUNTRIES

3.1 AUTOMOTIVE GARAGE STRUCTURE IN ROMANIA

3.1.1 OVERVIEW OF GARAGES IN ROMANIA

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

TABLE 5: OVERVIEW OF GARAGES IN ROMANIA

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

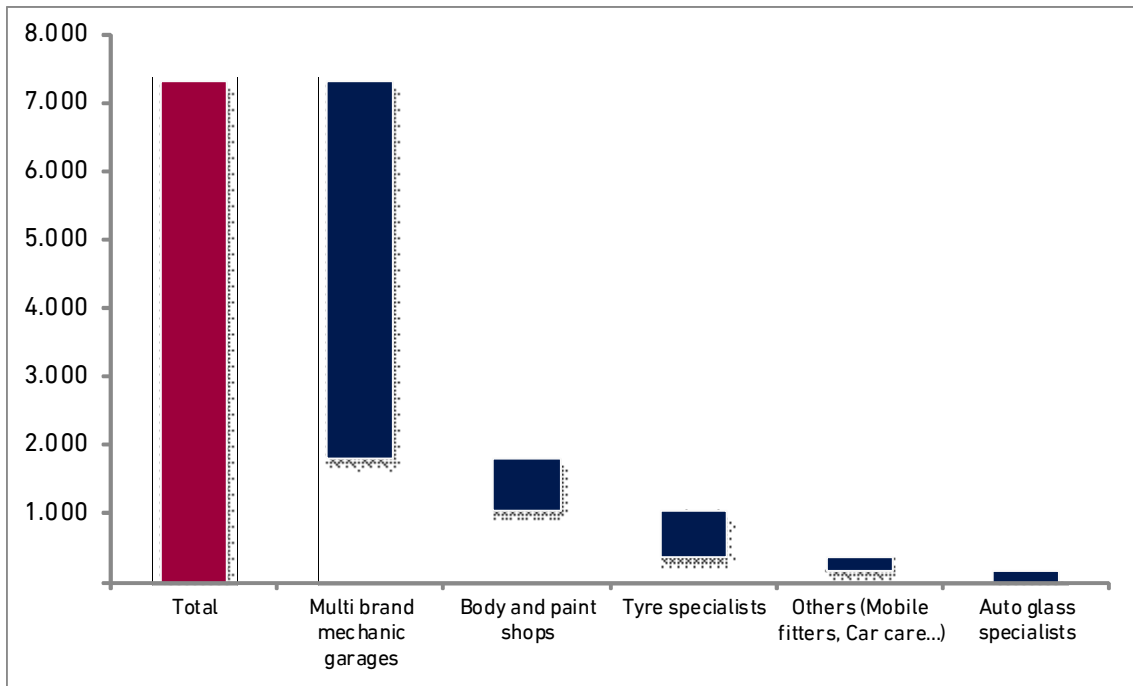
TABLE 6: MARKET SHARE COMPARISON: ROMANIA VS. EUROPE 34 VS. EUROPE TOP 5 VS. CLUSTER

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

TABLE 7: DENSITY COMPARISON: ROMANIA VS. EUROPE 34 VS. EUROPE TOP 5 VS. CLUSTER

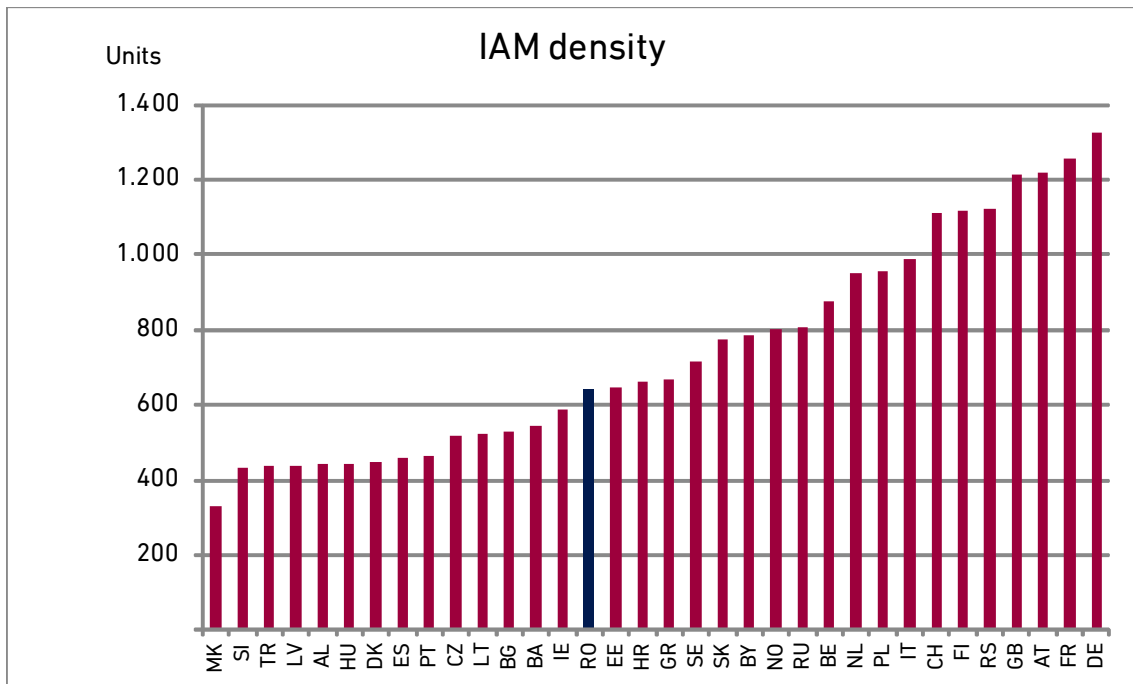


3.1.1.1 BREAKDOWN OF IAM GARAGES IN ROMANIA



PICTURE 6: BREAKDOWN OF IAM GARAGES IN ROMANIA

3.1.1.2 IAM DENSITY IN ROMANIA



PICTURE 7: IAM DENSITY IN ROMANIA



3.1.2 IAM GARAGE SERVICE CONCEPTS IN ROMANIA

3.1.2.1 IAM SERVICE CONCEPTS FOR MULTI BRAND MECHANIC GARAGES IN ROMANIA

Type of garage	Number of Garage Concepts	Number of Outlets in Concepts	Garages per Concept	Share of Concepts
Multi brand mechanic garages	xxx	xxx	xxx	xxx %
Tyre specialists	xxx	xxx	xxx	xxx %
Body and paint shops	xxx	xxx	xxx	xxx %
Auto glass specialists	xxx	xxx	xxx	xxx %
Others	xxx	xxx	xxx	xxx %
Total IAM garages	xxx	xxx	xxx	xxx %

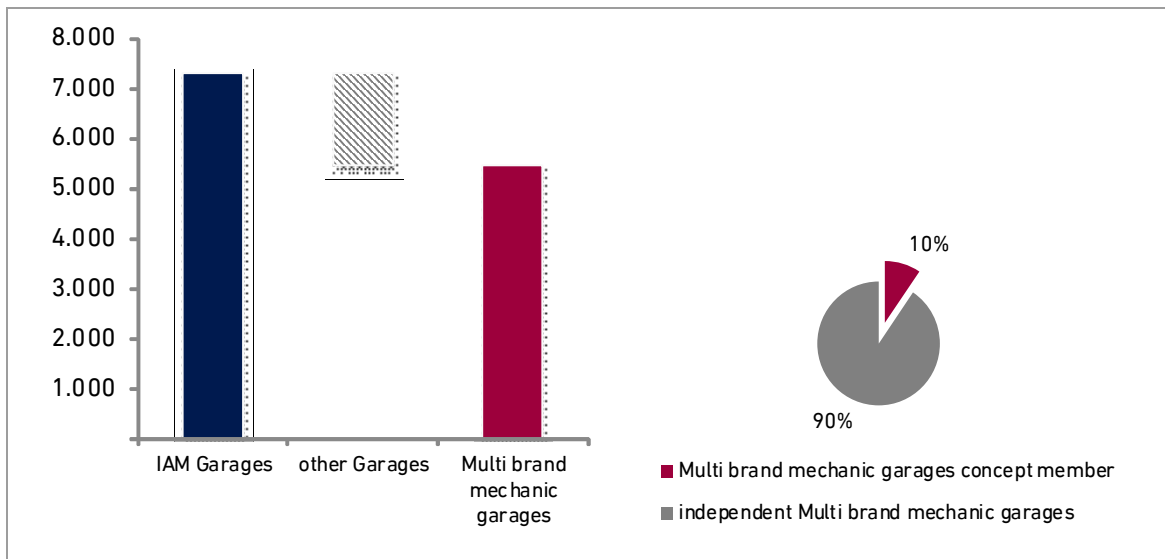
TABLE 8: OVERVIEW SERVICE CONCEPTS IN ROMANIA

Number of Garage Concepts: Number of garage concepts in the country.

Number of Outlets in Concept: This is the number of outlets which are member of a garage concept.

Garages per Concept: This is the average number of garages which are member of a garage concept.

Concept Share: This percentage describes the share of garages belonging to a garage concept.

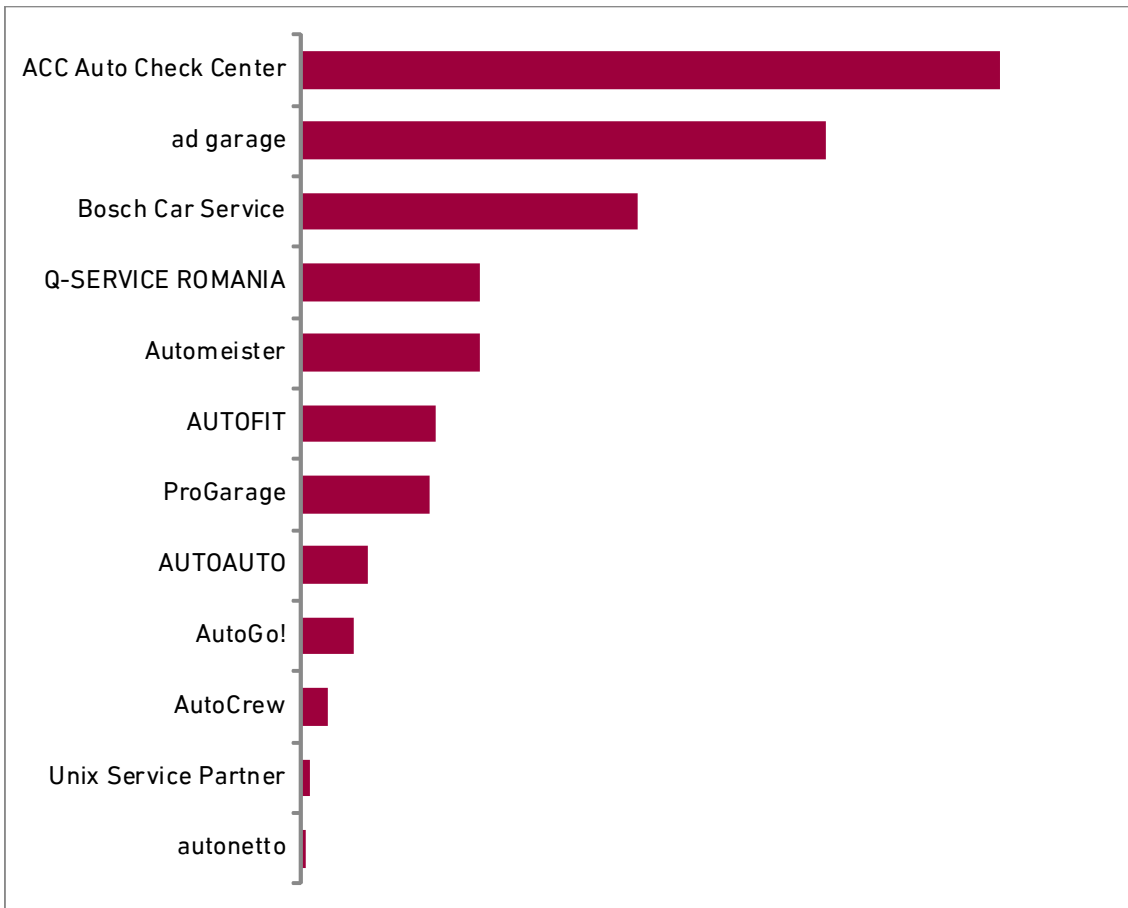


PICTURE 8: IAM SERVICE CONCEPTS FOR MULTI BRAND MECHANIC GARAGES IN ROMANIA



No.	Company	Disposer	Outlets (year)
1	ACC Auto Check Center	ATR International AG	xxx (2014)
2	ad garage	adi Autodistribution International	xxx (2014)
3	Bosch Car Service	Robert Bosch GmbH	xxx (2014)
4	Q-SERVICE ROMANIA	Inter Cars S. A.	xxx (2014)
5	Automeister	point S Development	xxx (2014)
6	AUTOFIT	Trost Auto Service Technik SE	xxx (2014)
7	ProGarage	GROUPAUTO International	xxx (2014)
8	AUTOAUTO	Trost Auto Service Technik SE	xxx (2014)
9	AutoGo!	Trost Auto Service Technik SE	xxx (2014)
10	AutoCrew	Robert Bosch GmbH	xxx (2014)
11	Unix Service Partner	UNIX AUTO KFT.	xxx (2014)
12	autonetto	Trost Auto Service Technik SE	xxx (2014)
	Total		xxx

TABLE 9: OVERVIEW MULTI BRAND MECHANIC GARAGES IN ROMANIA



PICTURE 9: OVERVIEW MULTI BRAND MECHANIC GARAGES IN ROMANIA