Market Information Database

Study

The market for body & paint work in the tension field of IAM & OES

Incl. supplier acceptance, service structures and product segmentation in the buying process

Teaser

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Imprint

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1. Definitions and Abbreviations Used

AAG/GPC	Alliance Automotive Group
B2B	Business to Business
B2C	Business to Consumer
Body and Paint Garages	Within the context of this study, body and paint garages are defined as garages that generate the largest share of their total sales with body and paint work.
Genuine Parts	see Genuine Spare Parts
Genuine Spare Parts	Spare parts of the manufacturer-specific market (here: with the car manufacturer's stamp)
GPC	Genuine Parts Company
IAM	Independent Aftermarket
IAM Garages	Independent car garages, in this report excluding specialists such as body/paint, tyre trade, car glass specialists, engine reconditioners, car centres
IAM Parts	Spare parts from the independent market
IAM Parts Wholesalers	Parts wholesalers mainly selling IAM parts
Local Parts Wholesalers	Parts wholesaler with annual sales below 20 million EUR
OE	Original Equipment
OE Parts	see Genuine Spare Parts
OEM	Car manufacturers
OES Garages	Synonym for authorised garages and service partners with a contract with a car manufacturer
OES Parts Wholesaler	parts wholesaler of genuine spare parts (with the car manufacturer's stamp)
Regional Parts Wholesalers	Parts wholesalers with annual sales of 20 to less than 100 Mio.
Supraregional Parts Wholesalers	Parts wholesaler with annual sales of 100 million and more

3. Introduction

The market for accident repairs in Germany has been influenced and shaped by a variety of factors in recent years. This includes for example the increasing complexity of vehicles, ongoing digitisation, the increasing share of driver assistance systems, e-mobility but also the increased influence of intermediates such as insurance companies, leasing companies or fleets.

Of particular importance for the body and paint market are intermediates, above all motor vehicle insurance policies, which have a strong influence on the accident repair business. The standards of the insurers have a massive impact on the optimization of process operations, the lowering of hourly rates and the optimization of prices for ordering parts. Whereas in the past, insurance contracts between drivers and insurers required the use of genuine spare parts (with the car manufacturer's stamp), today the genuine spare parts concept is rather defined by the genuine spare parts concept of the group exemption regulation. This means that structurally identical (full) ident parts from the independent market are also covered by the OE concept. The consequence: lower purchase prices for OE spare parts from the independent market, which are then used as a basis for invoicing by the body and paint garages. At the end, this development will also cover accepted part ident parts as well as used body parts.

[redacted]

[redacted]

[redacted]

4. Study Design and Characterization of the Garages Participating

Before the thematic content will be introduced in Chapter 5, the following chapter first presents the study design and the garages taking part in the survey.

4.1 Study Design

In principle, various garage types are active on the market for car garages. There are currently about 17,000 active service garages of the car manufacturers in Germany. In addition, there is the independent market with currently around 32,000 car garages.[4] However, garages often have different focus areas. For example, the independent market for spare parts is again divided into garages specialising in mechanics, tyres, bodywork & paint, glass, etc.

This heterogeneity makes it necessary to examine the market for car repairs differentiated by garage type. Accordingly, this study series was divided into several analyses. The present part examines the market situation of body and paint garages. Recently, the first part of the series of studies focusing on authorised garages (manufacturers' service partners) and independent mechanics shops has been published. Approximately 400 authorised garages and around 500 independent mechanics shops were surveyed on the same subject area.[5]

Approximately 3,400 body and paint garages are currently active in Germany.[6] Out of this total population, around 120 independent body and paint garages[7] were interviewed by telephone between 14 November 2016 and 10 January 2017.

However, body and paint work is not only carried out exclusively by body and paint garages. Authorised garages and independent garages also carry out body and paint work, albeit to

[4]See Wolk after sales experts access database.
[5]See also Lamsfuß (2017) The shopping behaviour of German garages in the tension field between IAM + OES incl. settings, acceptance, and evaluation of the parts wholesalers
[6]Cf. Wolk/Nikolic/Mende (2017), Garage structure in the European car aftermarket 2016.
[7]Body and paint garages are defined as garages that earn the largest share of their total sales with body and paint work.

a much lesser extent. As a result, this report was supplemented at various points by data from the parallel survey of around 400 authorised garages and around 500 independent mechanics shops.[8] In this context, those garages that carry out body and paint work themselves were taken into account. In the case of authorised garages, this figure is 90 % of the garages surveyed; in the case of independent mechanics shops, it is around 85 %.

In this way, it is not only possible to describe the market situation of body and paint garages, but also to obtain a comprehensive picture of the overall body and paint work carried out on the market.

Sales Share of Body and Paint Work by Garage Type

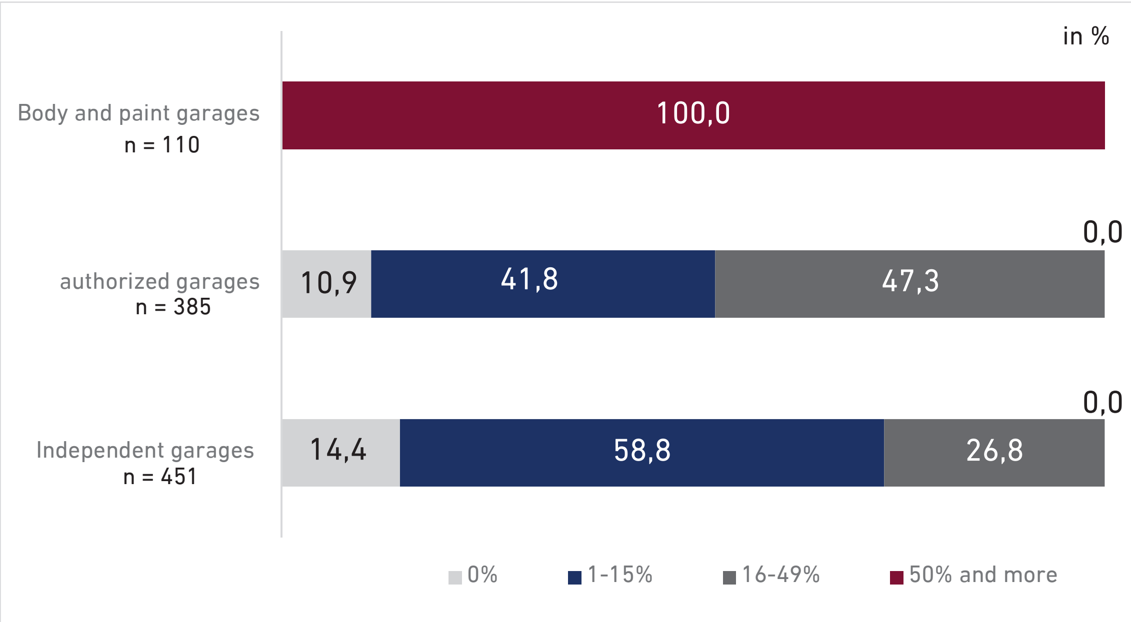

FIGURE 1: SALES SHARE OF BODY AND PAINT WORK BY GARAGE TYPE

[8]See also: Lamsfuß (2017) The shopping behaviour of German garages in the tension field between IAM + OES incl. settings, acceptance, and evaluation of the parts wholesalers

FIGURE 30: MOST IMPORTANT PARTS WHOLESALER OF GENUINE SPARE PARTS*

[redacted]

7.2.2 NUMBER OF PARTS WHOLESALERS OF GENUINE SPARE PARTS

The large number of "other" suppliers of genuine spare parts already indicates that body and paint garages obtain their required genuine spare parts mainly from different sources. On average, body and paint garages obtain their genuine spare parts from nine OES parts wholesalers. This means that the number of dealers of genuine spare parts far exceeds that of independent garages and authorised garages.[29]

Number of Genuine Spare Parts Dealers

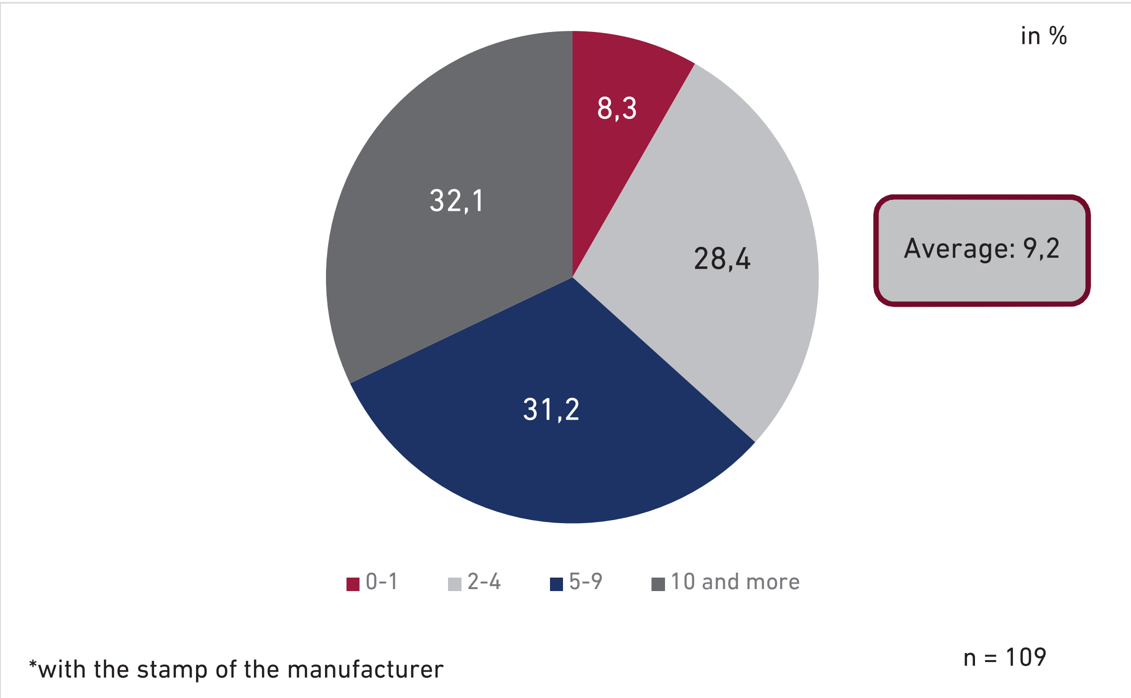

FIGURE 31: NUMBER OF GENUINE SPARE PARTS DEALERS

[29]Cf. Lamsfuß (2017) The shopping behaviour of German garages in the tension field between IAM + OES incl. settings, acceptance, and evaluation of the parts wholesalers.

Prices

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For more details or ordering see http://www.wolk-aftersales.com/the-market-of-body-and-paint-works-in-the-tension-field-between-iam-oe.html.

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