



**Handbook**

# **Auto centers in Europe**

*Bergisch Gladbach, August 2016*

**wolk** after sales  
experts

# Imprint

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# Introduction

- This handbook is about auto centers in Europe. Auto centers take a unique position in the distribution flow in Europe. They combine both sales of spare parts and accessories and repair services to be able to meet the customer's needs. Nevertheless, this distribution channel is not as widespread as the traditional distribution channels. The competition pressure is very high, and the acceptance of auto centers is varying depending on country. For example, France leads the way with respect to number of the concepts as well as number of outlets throughout the country.
- First of all, a precise distinction of close-by definitions (e.g. retail chains, trade marketing systems) is presented with demonstrative examples. Subsequently the position of the auto centers in the European distribution environment is emphasized before detailed profiles of auto centers follow.
- This handbook contains profiles of the most important international and national auto center concepts. Each single profile consists of general data, description of offered products and services, company data, including financial information and network development, important milestones in the history, information about business model and interesting facts about the company, and finally SWOT analysis.
- In addition to the seven international auto center concepts, there are some important national concepts as well. This is no surprise to find the national concepts in the same countries, where the international companies have been operating. But there are some sporadic concepts in other countries as well.
- Germany has for example four additional concepts beside A.T.U – stop+go, AUTOPLUS AG, Auto *plus*, hela Profizentrum. There are another two noteworthy French concepts Etape Auto and Autobacs which are represented in the market in addition to five French concepts spread throughout Europe. The UK has as well some considerable concepts. They differ slightly in their business model and are more similar to fast fits. Spain and Austria are other markets where auto center concepts are represented. There are less or no auto center concepts in Eastern Europe. Worthy of mention are Rus Treyd in Russia, ATL in Ukraine and Motoexpert in Bulgaria.
- All estimations, calculations and SWOT analysis presented in this report are a result of evaluation and analytical work done exclusively by wolk after sales experts; they are neither reported nor provided data from the particular company.
- Each company presented in the report had an opportunity to comment its own profile. All reported feedback was included in the profile.

# Definitions & distinctions



- **Mechanical garages:** are full service multi brand garages offering service for passenger cars and transporters. Mechanical garages are not specialized garages (such as in tyres, glass, climate service, etc.).



- **Auto centres:** are retailers (B2C) with integrated car service e.g. A.T.U or Norauto. Auto centres are neither fast fits nor specialised car services (such as in tyres, glass, climate service, etc.). The companies may have in some cases retail outlets under the same corporate identity e.g. Mekonomen and hela Profizentrum. The turnover is based primarily on B2C business including service business. In some cases, it also includes tools and business outside the passenger car segment e.g. bicycles. Standard settings are at least 100 m<sup>2</sup> workshop area with at least five workplaces and approx. 250 m<sup>2</sup> shop sales area.



- **Fast fit concepts:** offer a lean service (lower half services) for passenger cars, e.g. Midas, SPEEDY, Pitstop. They mostly offer wearing parts, oil, and tyres, including service. They may also offer air conditioning, engine diagnosis etc.



- **IAM specialized garages:** are such garages which are specialized e.g. in body & paint, tires, electrics/electronics, air conditioning, engine remanufacturing diesel, climate services, auto glass, car care, smart repairers, etc., e.g. Premio, Carglass, Identica.



- **Garage service concepts or garage marketing systems:** are mainly partner systems (only in some cases soft franchise systems) driven by buying groups, wholesalers, parts manufacturers or others, e.g. Bosch Car Service, Eurogarage The main aim is to increase the purchase loyalty of garages to the system disposer.



- **Trade marketing systems** are networks for small distributors driven by large or medium wholesalers. The network is contracted as franchisee or partnership system, e.g. Coparts Plus Partners, Motoo Trade Partners. The aim of such networks is to increase the purchasing loyalty and to get sales and marketing support to the partners .



- **Retail chains** sell automotive parts, accessories and additional products like products for leisure, camping, garden, ships, bicycles etc. primarily to end consumers (B2C), e.g. Biltema, Motonet. They do not offer any repair or maintenance services.



# Definitions & distinctions



Auto centers



Retail chains



Trade marketing systems

- Retail shops **with** an integrated workshop
- Business model:
  - Own outlets or franchise
- Focus on B2C (>98%)
- High frequented location
- Extended offer of accessories

- Retail shops **without** an integrated workshop
- Business model:
  - Own outlets
- Focus on B2C
- High frequented location
- Extended offer of accessories

- Traditional local spare parts shops **without** an integrated workshop
- Business model:
  - Partner system
- Focus mainly on B2B
- Location primarily in industrial areas

## Auto centers in the aftermarket supply chain



The independent aftermarket is characterized by traditional distribution levels and a great number of participants at the various levels (wide supply chain). Auto centers are only one channel of many.

# Contents

## 1. International auto centers in Europe

- A.T.U
- Norauto
- Carter-Cash
- Feu Vert
- Roady
- l'auto
- Mekonomen

## 2. National auto centers per country

- Germany: AUTOPLUS AG, AUTO plus, hela Profizentrum, stop + go
- France: Autobacs, Etape Auto
- UK: formula one, halfords, WILCO Motosave
- Austria: Forstinger
- Spain: Aurgi, TOP Recambios
- Russia: RusTreyd
- Ukraine: ATL
- Bulgaria: Motoexpert

# Allocation of auto centers in Europe



Reference: analysis by wolk after sales experts, desk research, expert interviews

Only auto center concepts in Europe are under consideration



# Auto centers in Germany – AUTO *plus* (1)



## General information:

Address:

xxx

Tel.: xxx

Fax: xxx

E-mail: xxx

Web: xxx

General Manager: xxx



General manager:  
xxx

## Product categories available in shops:

### Car parts & accessories:

- Xxx
- Xxx
- Xxx
- xxx

### Services offered in workshops :

- Xxx
- Xxx
- Xxx
- XXX

# Auto centers in Germany – AUTO plus (2)



## Company data:

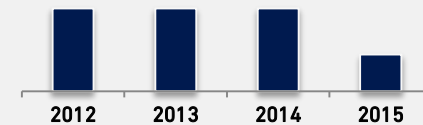
Company	Country	Outlets	Employees (estimated)	Turnover
AUTO plus	xxx	xxx	xxx	xxx.
total		xxx	xxx	xxx

## History:

- 2016** • Xxx
- 2015** • Xxx
- 1997** • Xxx
- 1994** • Xxx

## Network and turnover development:

XXXXXXXXXXXXXX



XXXXXXXXXXXXXX

# Auto centers in Germany – AUTO *plus* (3)



**Good to know:**

- Xxx
- Xxx
- Xxx
- Xxx

**Business model:**

- Xxx
- Xxx
- Xxx
- Xxx

**Standards for an average outlet:**

- Xxx
- Xxx
- Xxx
- Xxx

**SWOT analysis**

<b>Strengths</b>	<ul style="list-style-type: none"> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> </ul>	<b>Weaknesses</b>	<ul style="list-style-type: none"> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> </ul>
	<ul style="list-style-type: none"> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> </ul>		<ul style="list-style-type: none"> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> <li>• Xxx</li> </ul>
<b>Opportunities</b>		<b>Threats</b>	

Reference: analysis by wolk after sales experts, desk research, expert interviews

Only auto center concepts in Europe are under consideration

## The key to more after sales success



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