REPORT

Powering Europe forward

Why the independent automotive aftermarket matters more than ever



FIGIEFA
Automotive Aftermarket Distributors

wolk nikolic BBE

Roland Berger

Management summary

The European independent automotive aftermarket (IAM) is critical infrastructure for Europe's mobility, competitiveness, and economic resilience. It anchors skilled employment across a dense, multi-brand repair network and helps keep the continent's 369 million vehicle parc safe and roadworthy.

For the first time, this study quantifies the IAM's full contribution, measuring it directly and system-wide. The IAM now represents around EUR 100 billion in direct market value across Europe, roughly 64 % of its total EUR 156 billion aftermarket. Beyond this, it creates system-level value, enabling around 314 billion additional kilometers of mobility each year - 9 % more than otherwise possible. It generates an estimated EUR 65 billion in additional new-vehicle spend through stronger residual values, and EUR 23 billion in economic value by reducing vehicle downtime. Together, these effects reveal a contribution larger than direct market value suggests.

This contribution is not guaranteed. As vehicles become more software-defined, constrained access to vehicle data, information, and software functions increasingly threatens the IAM's ability to create this value. Unless independent operators retain secure, usable, and non-discriminatory access to repair-relevant data, information, diagnostics, and in-vehicle functions, competition, affordability, and consumer choice are all at risk. This makes secure access to data and information as much a competitiveness issue for Europe's automotive industry as a consumer choice one. It is the most acute of several pressures facing the sector, alongside workshop capability gaps and pressure on Europe-based value creation.

Capturing this value will require action on several fronts. IAM players will need to continue investing in repair capability, digital tools, training, diagnostics, and new service models. OEMs stand to benefit from treating the IAM as a partner in delivering lifecycle value, not simply a competing channel. And a fair, future-proof regulatory framework, one that safeguards competition, innovation, and consumer choice in the sector, will be essential to the whole picture. Acting together now will determine whether Europe captures the full value of a strong, independent aftermarket, or allows it to erode.

Cover: Patrick Wode/iStock

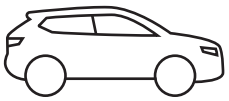
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Fast facts

314 bn

additional kilometers are driven annually through the European IAM, equivalent to **9% additional mileage**



The IAM supports **EUR 65 billion** in additional annual spend on new vehicles through residual value effects

23 bn

euros economic impact from reduced vehicle downtime in the European IAM

Introduction: Why the IAM matters for Europe



1

The independent aftermarket (IAM) is a cornerstone of Europe's strategic autonomy, industrial competitiveness, and consumer choice. It keeps mobility safe, affordable, and resilient, while anchoring value creation, employment, and critical capabilities inside Europe (see methodology section for full list of countries included). This chapter examines each of these contributions in turn. At the same time, the aftermarket is entering a structural transition that will require all stakeholders – from vehicle manufacturers to policymakers – to adapt in order to preserve its contribution to Europe's mobility system and wider economy.

Keeping vehicles safe and roadworthy

The IAM underpins safe and reliable mobility across Europe's vehicle parc of roughly 369 million vehicles, including 332 million passenger cars, making it system-critical infrastructure for everyday mobility, commuting, and the wider economy. It supports vehicles across the full lifecycle, from newer models requiring advanced diagnostics, software access, and electronic repair capability, to older vehicles with growing maintenance and repair needs.

Europe's passenger car parc is not only large but also aging: average passenger car age rose from 11.9 to 12.9 years between 2020 and 2024. This increases the importance of continuous maintenance, repair quality, parts availability, and technical capabilities to ensure vehicles remain compliant and reliable. ▶ A

Enabling more mobility and supporting economic activity

Consumers and fleets rely on IAM repair and maintenance across all vehicle age segments. Economic uncertainty, rising new-vehicle prices, and technological uncertainty are extending the time vehicles stay in service, increasing the relevance of efficient, cost-effective maintenance and repair as cost sensitivity grows over the vehicle lifecycle.

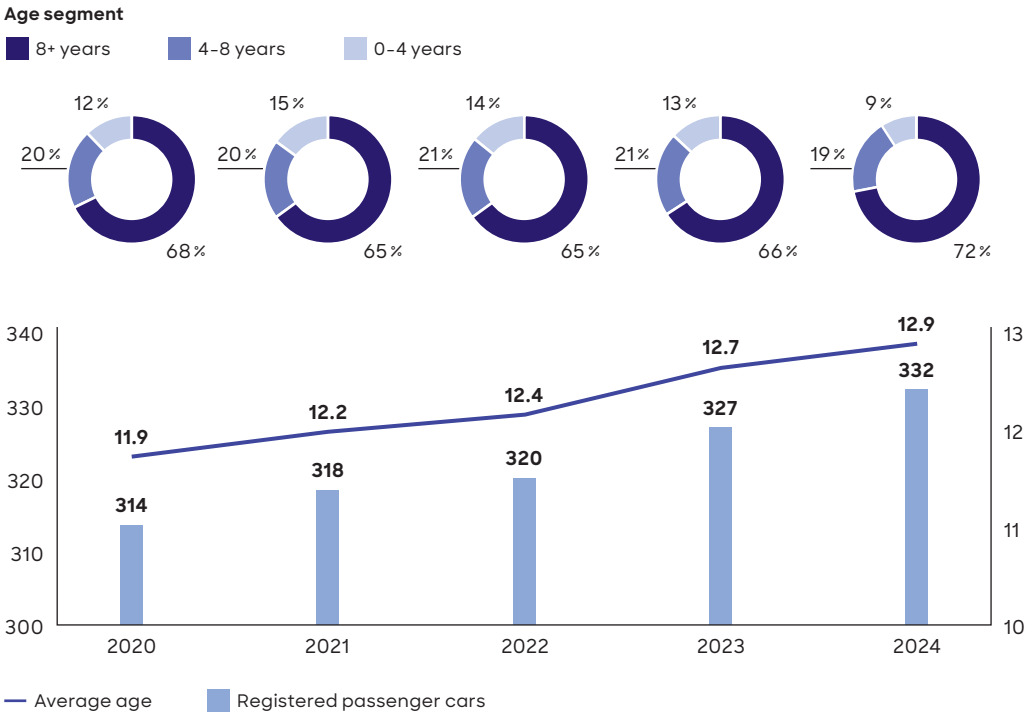
By keeping repair and maintenance competitive, the IAM lowers the cost of vehicle ownership and helps protect vehicle value over time. The IAM also preserves consumer choice and fleet efficiency beyond the channels controlled by original equipment manufacturers (OEMs – in this report, this refers solely to vehicle manufacturers) by providing a dense repair network, even in remote areas, catering to all vehicle age groups and brands.

Enhancing OEM competitiveness and value

The relationship between OEMs, suppliers, and the IAM is structurally symbiotic. OEMs drive vehicle development, product innovation, and brand positioning, while the IAM continuously develops competitive and innovative repair methods, diagnostics, digital tools, and circular solutions that improve how efficiently vehicles operate.

The IAM reinforces the OEM value proposition in three ways: it upholds the promise of vehicle longevity and efficient operation; it provides service affordability and parts availability across the full vehicle lifecycle; and it complements OEM networks, particularly where network density, affordability, and cost efficiency matter most. For parts suppliers, the aftermarket represents an attractive value pool and profitability backbone that supports their competitiveness and helps cross-finance innovation. As the larger of Europe's two

A **Europe's aging car parc keeps driving aftermarket demand**
Development of the European passenger car parc, including age segments and average age [m vehicles]



Source: Wolk & Nikolic After Sales Intelligence

aftermarket channels, a strong IAM strengthens the overall automotive market and supports future vehicle demand.

Anchoring value creation in Europe

The IAM is a system-relevant sector for Europe's economy, not just its mobility system, and its contribution rests on three connected strengths.

First, the IAM creates substantial economic value. It anchors a dense network of local workshops, distributors, and service providers across every region, sustaining significant employment and activity among small and medium-sized enterprises (SMEs). In 2025, Europe counted roughly 31,700 IAM parts distribution companies and 427,000 employees, alongside approximately 332,000 employees in independent workshop outlets. Much of this employment consists of qualified positions with constant upskilling and growth potential.

Second, this scale strengthens Europe's resilience. Because the IAM is a broad, decentralized ecosystem, it does not depend on any single company, location, or supply chain to function. This structure preserves critical technical, diagnostic, logistics, and industrial capabilities across the continent.

Third, diversified sourcing makes this resilience work in practice. IAM players combine international supplier diversification with pan-European distribution networks, allowing the sector to reroute supply and maintain parts availability even when individual supply chains are disrupted. ▶ B



Interview

Maximilian Wegner
Principal at Roland Berger

> **"The IAM delivers on the OEM's promise of vehicle longevity and serviceability, while enabling a faster, more cost-efficient and age-adequate service that directly supports European competitiveness."**

Industry perspective:
Why a strong IAM matters for Europe's competitiveness

How does the IAM support European OEMs?

MAXIMILIAN WEGNER: Independent workshops complement authorized networks by providing dense multi-brand service coverage across vehicle age groups, brands, and regions, including for used-car customers and rural areas. This lets OEMs maintain high customer service levels without building excessively large brand-specific networks of their own.

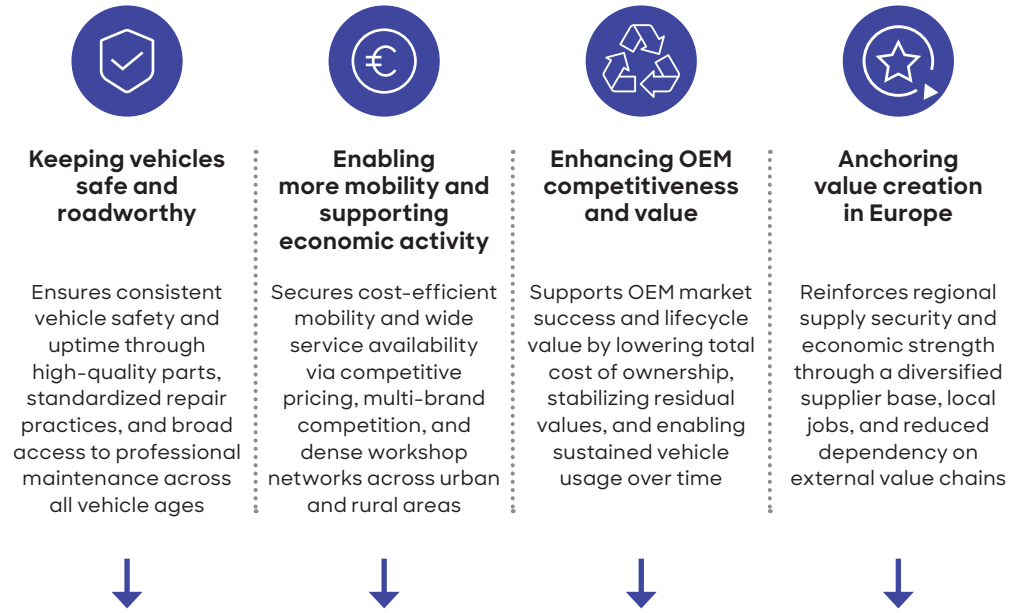
Why is this relevant against new entrants?

Three dynamics matter here. Chinese OEMs are competing partly on price, and the IAM helps Western OEMs narrow the cost gap by lowering repair costs and supporting residual values. As Western OEMs shift customers to EVs, broad repair capability and parts availability help reassure buyers that vehicles stay repairable and valuable over time. Lastly, established OEMs already benefit from a dense, experienced network of workshops and distributors that new entrants will take years to replicate.

What could put this relationship under strain?

New technologies, increasingly software-defined and connected, are making vehicles more complex. Consequently, OEMs are gaining growing control over repair-relevant data, software functions, and parts-replacement processes. This shift is strongest in newer vehicles today but will progressively extend across the vehicle parc. It creates new lifecycle monetization opportunities for OEMs, even where repairs are carried out in the IAM. But if access fees and authorization requirements harden into a structural surcharge, that risks undermining both IAM viability and consumer affordability.

B **Four ways the IAM strengthens Europe's automotive economy**
From safety to cost-efficient mobility



Source: Roland Berger

Transition: The aftermarket is entering a phase of structural transition

Sustaining these contributions is not guaranteed. The technological, competitive, and regulatory environments in which the IAM operates are shifting. How it adapts will determine whether these strengths persist. Electrification is reducing traditional mechanical service intensity while increasing the relevance of electronics, battery-related services, and diagnostics. New electronic architectures, software-defined vehicles, and connectivity are making data access, parts coding, and software-enabled repair increasingly critical, and OEMs are increasingly seeking to steer customers and control lifecycle access, which could limit the IAM's role if left unaddressed. New entrants, particularly Chinese OEMs, are challenging established competitive dynamics and creating new requirements for service readiness, parts availability, and data access. Meanwhile, deglobalization, geopolitical uncertainty, and shifting trade policy are adding further supply chain complexity, making resilient sourcing and efficient European distribution more important than ever.

The question running through this study is whether Europe retains a strong, independent aftermarket that continues to protect safety, affordability, consumer choice, OEM competitiveness, and its own strategic autonomy, or whether these structural pressures erode that position over time.

Quantifying aftermarket value creation



2

The IAM creates substantial value for Europe's automotive industry and consumers, both directly through the parts and services it sells, and indirectly through system-level effects that lower total cost of ownership, support residual values, and improve vehicle availability. This is the first study to quantify these effects together. It first establishes the direct market picture, then quantifies the IAM's broader economic contribution, before tracing how value is created at each stage of the aftermarket chain.

2.1/ Conceptual foundation: Direct and system-level value creation in the IAM

The European automotive aftermarket encompasses all parts, repair, maintenance, and related services required after a vehicle is sold. It comprises two distinct but interacting systems: the OEM-controlled authorized channel and the independent automotive aftermarket.

The IAM operates as a multi-brand ecosystem outside OEM-controlled networks, linking parts manufacturers, independent distributors, diagnostics and data providers, remote service suppliers, workshop networks, fleets, insurers, and end customers. ▶ C

Direct value creation refers to the market value of parts and services generated across both channels; system-level value captures the broader economic and mobility benefits that a strong IAM enables specifically, including lower running costs, stronger residual values, higher vehicle availability, and greater consumer choice. This study's quantification focuses on the parts market; labor and service revenue, not separately measured here, is estimated to add a broadly comparable amount to total aftermarket value. This chapter first establishes the total direct aftermarket value pool and its channel split, before turning for all subsequent system-level quantification and value chain analysis specifically to the IAM.

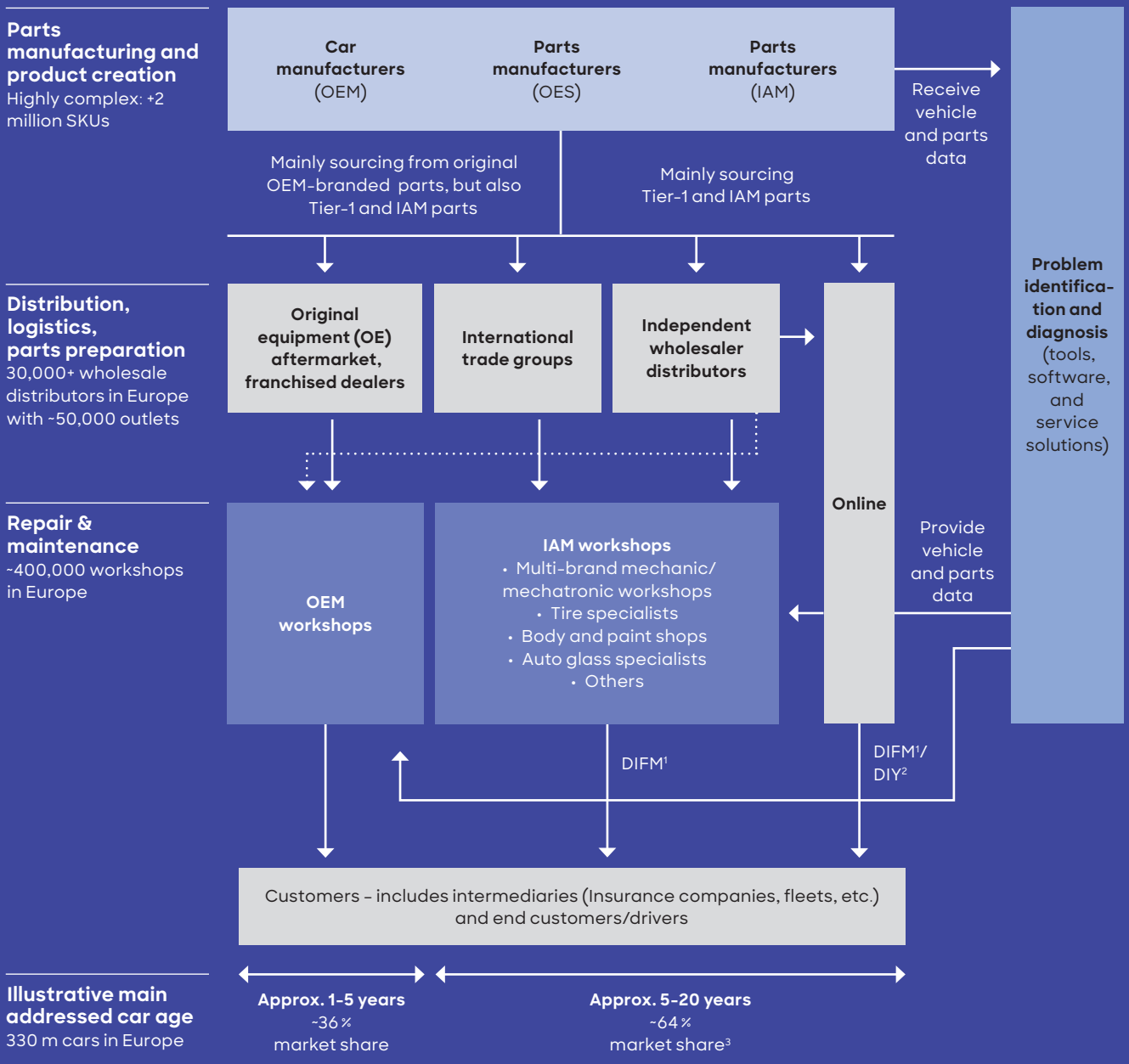
2.2/ Direct value creation: Total European aftermarket value pool

The IAM represents the majority of a large and resilient European aftermarket value pool spanning parts, repair, and maintenance. Between 2021 and 2025, consolidated aftermarket spare parts value increased from around EUR 129 billion to EUR 156 billion, a compound annual growth rate of 4.9 % over four years, according to data provided by Wolk & Nikolic.

Their data shows that growth was not driven by network expansion: indeed, the total number of workshop outlets in Europe declined slightly, from 402,917 in 2021 to 399,795 in 2025 – a fall of 0.9%. The two channels moved differently over that period, with OEM-controlled workshops declining from around 71,000 to around 68,000, while the independent network grew slightly from 331,000 to 332,000. Growth in the value pool therefore primarily reflects higher value intensity per outlet, rising vehicle complexity, price effects, and sustained demand across the installed base, rather than more outlets serving more vehicles. ▶ D

C The building blocks of the aftermarket ecosystem

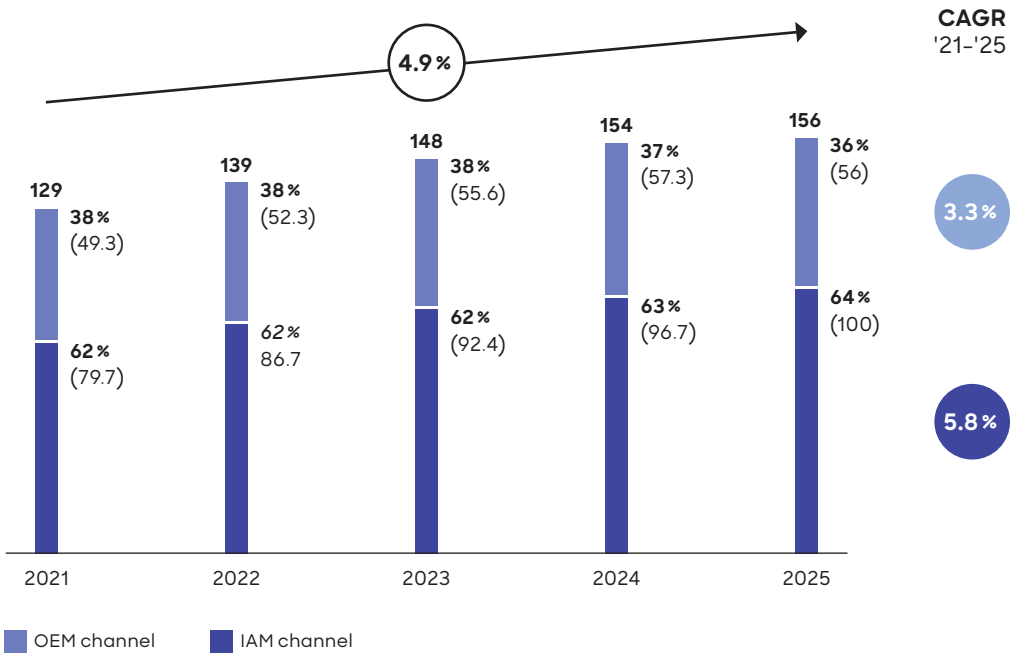
Overview of the automotive aftermarket value chain



1 Do-it-for-me 2 Do-it-yourself 3 Share denotes the sales channel, not part origin

Source: Roland Berger

D **The independent aftermarket continues to outgrow the OEM channel**
Aftermarket spare parts value by channel 2021–2025, excluding labor
[EUR billion; %]



Source: Wolk & Nikolic After Sales Intelligence

Consistent with this, the IAM's total market share rose from 61.8% in 2021 to 64.1% in 2025, while OEM-controlled channels declined from 38.2% to 35.9%.[1] This is notable, as rising vehicle complexity is often assumed to favor OEM-controlled networks, given their direct access to OEM tools, data, and training. Instead, the IAM is strengthening its position as the core channel for maintaining Europe's vehicle parc across age segments.

Yet, while the market share of IAM is increasing, it is important to note that OEMs are increasingly capturing value in the IAM channel through fees, e.g., related to digital data access, coding, etc.

Vehicle lifecycle dynamics

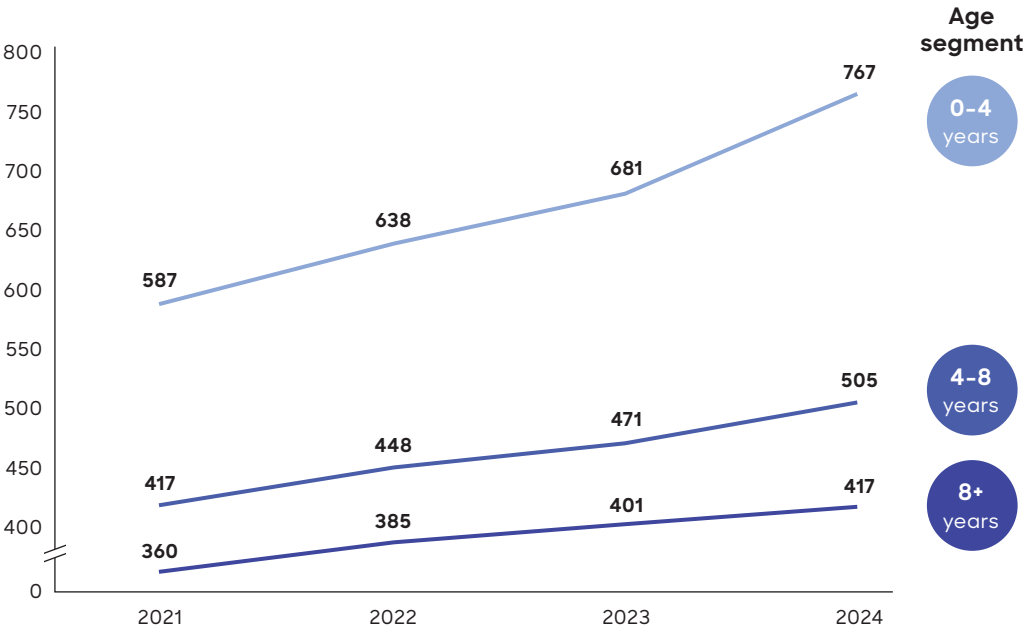
Service demand evolves materially over a vehicle's lifecycle. Younger vehicles generate higher annual parts spend per vehicle due to higher-value components such as advanced driver assistance systems (ADAS)-related body and windscreen work, stricter repair requirements, and greater technical complexity. For 2024, the Wolk & Nikolic data shows that average annual parts spend per passenger car reached EUR 767 for vehicles aged 0–4 years (up 31% vs. 2021), EUR 505 for vehicles aged 4–8 years (up 21%), and EUR 417 for vehicles aged eight years and over (up 16%). ▶ E

Vehicles aged eight years and over remain highly relevant to the IAM due to the sheer size of the installed base, rising cost sensitivity, and stronger demand for flexible, multi-brand repair. But IAM competition is not confined to older vehicles: crash repair is relevant from "day one," whenever an accident occurs. In the brake repair market, for example, the IAM captures around 45% of the market for vehicles under four years, with particularly strong usage among fleets.[2] This reflects demand for IAM services throughout the vehicle lifecycle,

1 IAM share denotes the sales channel, not part origin; volumes can include OE parts and DIY

2 Wolk & Nikolic, The EU-27 + UK Brake Aftermarket 2025

E **Vehicle age drives a widening aftermarket spending gap**
Average annual spend on passenger car parts and components by age segment [EUR]



Source: Wolk & Nikolic After Sales Intelligence

including from fleet owners and operators seeking to manage total cost of ownership, and increasingly involving more complex work. This points to two distinct drivers of IAM relevance. For newer vehicles, participation increasingly requires advanced diagnostics, data access and electronic repair capabilities; vehicles aged eight years and over drive scale, affordability relevance, and structural IAM participation.

> **"The IAM is demonstrating its essential role in maintaining Europe's vehicle parc across all age segments, even as vehicles become more complex."**
>
> **Sylvia Gotzen, Chief Executive at FIGIEFA**

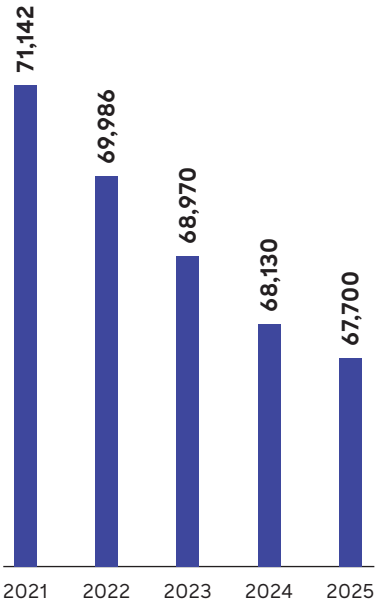
Role of repair networks: Authorized and independent aftermarket

The IAM is the structural backbone of Europe's repair infrastructure: independent workshops account for more than 80 % of workshop outlets in Europe, and multi-brand mechanic and mechatronic workshops account for roughly half of all workshop operations. ▶ F

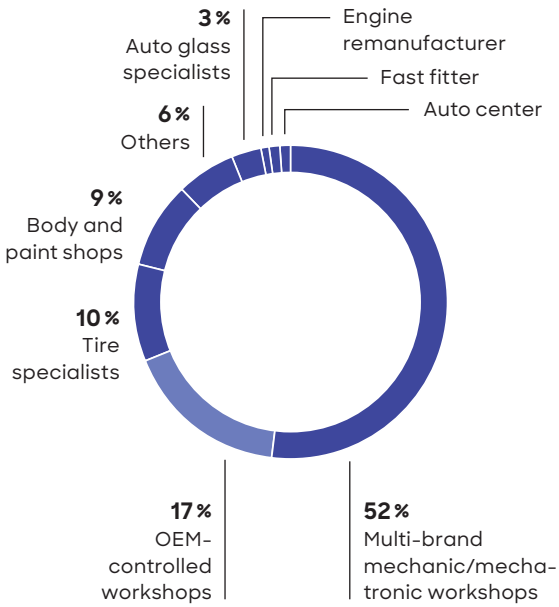
Without this dense independent network, OEMs alone could not provide sufficient repair access, geographic coverage, and service capacity across Europe's full vehicle parc. Together, the two channels ensure lifecycle coverage, operational continuity, dense repair access, competition, and consumer choice.

F **Independent workshops grow as OEM networks shrink**
Market shares by workshop type 2025 and development of workshop networks 2021–2025

OEM-controlled workshops
2021–25



Market shares by workshop type
2025 [%]



Independent workshops
2021–25



Source: Wolk & Nikolic After Sales Intelligence

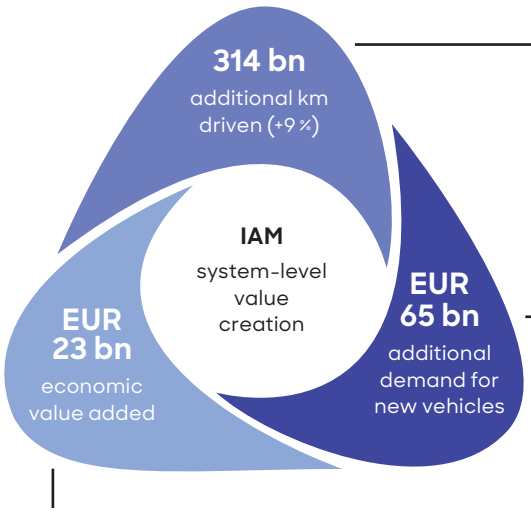
2.3/ System-level value creation: How the IAM enables additional economic benefits

Beyond the direct market revenues quantified above, the IAM creates additional system-level value that authorized networks alone could not generate, meaning its total contribution is significantly higher than direct parts and service revenue suggests. This broader contribution rests on three structural effects: lower running costs, higher residual values, and improved availability and uptime. Together, these translate into more affordable mobility, greater purchasing power for vehicle replacement, and time savings from faster repair access. ▶ G

Quantification of system-level value creation

Three effects show the scale of the IAM's contribution. First, lower running costs unlock more mobility. The IAM lowers the effective cost of vehicle ownership by offering competitive parts, labor, and service alternatives across the vehicle lifecycle, which reduces individual repair bills and increases the mobility consumers can afford within a given budget. On this basis, the IAM enables Europeans to drive around 9 % more kilometers per year, equivalent to roughly 314 billion additional kilometers annually (see methodology section). Without competitive independent maintenance and repair, many consumers would drive less, defer necessary repairs, or face higher total mobility costs. This effect is particularly relevant today: consumers keep vehicles longer and used-car ownership is rising, increasing the importance of affordable repair as vehicles age. At the same time, households are growing more sensitive to total cost of ownership.

G The IAM's real value goes well beyond revenue
IAM system-level value creation



Lower running costs enable broader everyday mobility
IAM offers competitive parts, labor, and service alternatives that lower cost per kilometer – enabling consumers to commute, reach essential services, and maintain social participation within the same mobility budget

Cost-efficient repairs enable stronger vehicle value retention
IAM keeps vehicles economically viable across the lifecycle and supports residual values – enabling consumers to preserve vehicle value and free up budget for future vehicle purchases

Dense service networks enable more productive use of time
IAM reduces travel, waiting, and downtime through broad workshop coverage – enabling customers and businesses to spend less time on repairs and more time on value-adding activities

Source: Roland Berger

Second, cost-efficient repair protects vehicle value and supports new-vehicle demand. Competitive repair pricing keeps the cost of maintaining a vehicle below the point where repair no longer makes economic sense relative to the vehicle's value. This extends the period over which a vehicle remains worth repairing, which supports residual values, stabilizes the new and used-car markets, and preserves consumer purchasing power for future vehicle replacement. This residual value effect is worth an estimated EUR 65 billion in additional new-vehicle spend per year, equivalent to roughly 13 % of current new-vehicle spend in Europe and one of the IAM's most material system-level contributions (see methodology section). Importantly, this means the IAM does not compete with OEMs in a zero-sum way: a strong IAM strengthens the overall vehicle market by making ownership more attractive, protecting residual values, and supporting future new-car demand. This is especially important for European OEMs competing with new entrants, as a mature and competitive aftermarket increases customer confidence over the full vehicle lifecycle.

Lastly, dense service networks reduce downtime and create economic value. The IAM's extensive workshop and distribution network reduces travel, waiting, and repair time, an effect reinforced by remote service suppliers, which add a digital layer to the physical network by connecting workshops across Europe to on-demand expertise in remote diagnostics, programming, coding, calibration, and technical support. This allows workshops of every size and location to handle complex repairs on the latest connected, electrified, and software-defined vehicles without maintaining every brand-specific capability in-house. The result: improved repair efficiency and reduced downtime – a benefit that extends beyond private consumers to fleets, SMEs, and commercial users for whom vehicle availability directly affects productivity. Higher service access and lower downtime through the IAM generate an estimated EUR 23 billion in annual economic value (see methodology section). This effect could not be replicated efficiently by authorized networks alone, since it depends on the density, flexibility, and multi-brand capability of the independent service supply chain.

Taken together, IAM value creation consists of two reinforcing layers: direct value through parts, repair, and maintenance services, coupled with system-level value through lower running costs, higher residual values, and improved availability. The three quantified system-level effects, roughly 314 billion additional kilometers, EUR 65 billion in additional new-vehicle spend, and EUR 23 billion in economic value added, show that the IAM's economic contribution is significantly larger than direct market revenues alone suggest – and this is before accounting for further, non-quantified effects such as insurance cost impacts, fleet uptime, and broader productivity gains. The IAM therefore functions as critical infrastructure for Europe's economy: it keeps vehicles economically usable, technically serviceable, and quickly repairable across their full lifecycle, making a strong IAM not only a consumer choice issue but a competitiveness issue for Europe's automotive industry.

2.4/ How value is created at each stage of the chain

Each stage of the aftermarket chain contributes differently to running costs, residual values, and availability. ▶ H

H Each IAM player adds systemic value in several ways

Value creation along the aftermarket value chain

	Role in value chain	Running cost	Residual value	Avail-ability
OEM	Vehicle design, production, technology development, and control of architecture, software, and early lifecycle service logic	Influence through vehicle design, efficiency, and durability, but limited contribution to cost-efficient lifecycle repair	Impact through brand, quality, and positioning, but growing dependency on aftermarket repair economics	Strong early-lifecycle control, but limited reach for aging vehicles and long-tail service needs
Parts manufacturing and product creation	Engineering, redesign, manufacturing, and quality assurance of affordable replace-ment parts and repair solutions	Lower-cost alternatives to OEM parts, enabling more affordable maintenance and repair	Affordable parts availability keeps later-life repair economically viable and supports vehicle value	Broad parts coverage across vehicle types, especially for aging and long-tail vehicle parc
Distribution, logistics, and parts preparation	Parts availability, assortment management, logistics, workshop support, and technical enablement across the aftermarket	Competitive sourcing, pricing transparency, and cost-efficient procurement for workshops	Reliable parts access keeps vehicles repairable and supports repair over replacement	Fast parts delivery, shorter repair cycles, and dense service infrastructure
Problem identification and diagnosis	Fault identification, repair scope definition, parts selection, and steering of cost-efficient repair decisions	Accurate repair scope definition, avoiding over-repair, misdiagnosis, and unnecessary parts replacement	Better repair-versus-replacement decisions and more transparent vehicle condition at resale	Faster fault identification, shorter repair cycles, and quicker return to operation
Repair and maintenance	Execution of maintenance, repair, installation, and customer service through local workshop networks	Competitive labor pricing and efficient execution, enabling affordable service alternatives	Preserved vehicle condition, longer usable lifetime, and stronger resale value	Local service access, shorter travel and waiting times, and reduced vehicle downtime

Value creation impact: low high

Source: Roland Berger

OEMs

OEMs drive vehicle design, technology development, architecture control, and early lifecycle service logic. Their influence on running costs and residual values is largely indirect, through vehicle efficiency, durability, brand, and positioning, though this is an increasingly dependent relationship, as aftermarket repair economics shape residual value outcomes. OEMs have strong control over availability early in a vehicle's life but limited reach into later-lifecycle and long-tail service needs. OEMs benefit from a strong IAM because cost-efficient lifecycle support strengthens vehicle attractiveness, residual values, and customer confidence.

Parts manufacturing and product creation

Parts manufacturers handle the engineering, manufacturing, and quality assurance of replacement parts, repair solutions, and remanufactured products. They have a high impact on running costs, through lower-cost alternatives to OEM parts and the price competition they introduce, as well as a high impact on residual values, by keeping later-life repair economically viable through affordable parts availability. Their impact on availability is more moderate, coming through broad parts coverage across vehicle types, including later-lifecycle and long-tail applications. Structurally, this stage anchors industrial capability in Europe wherever value-added engineering, production, and remanufacturing remain based there.

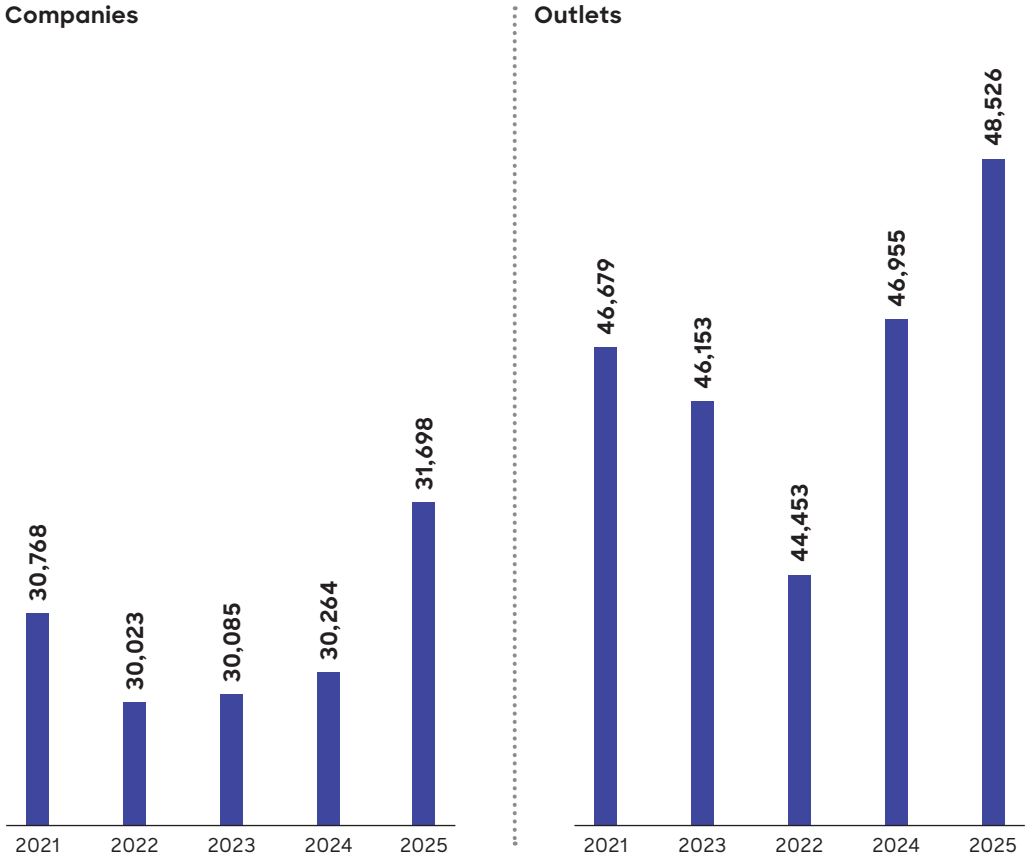
Independent parts distribution, logistics, and parts preparation

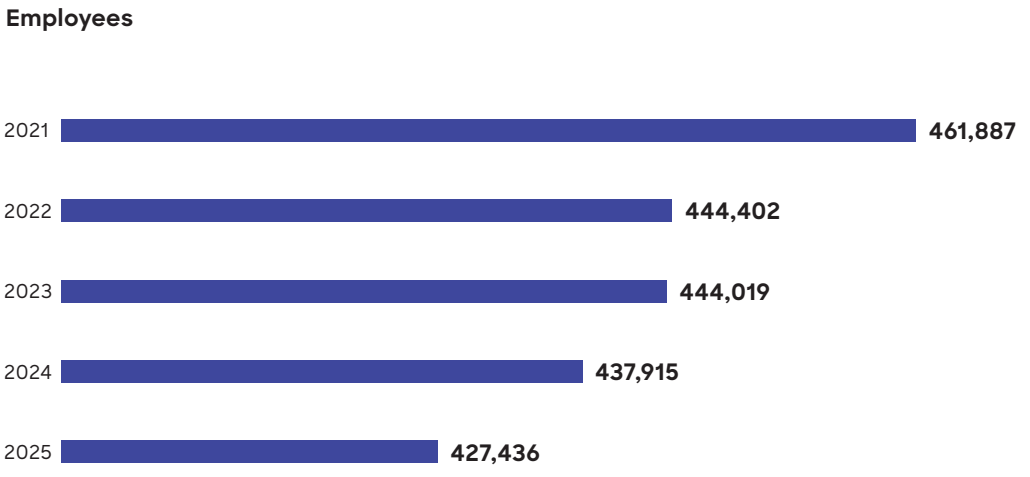
Independent distributors match the correct replacement part across thousands of vehicle models and variants using catalog data, vehicle application information, and technical documentation. They then consolidate broad multi-brand assortments and manage rapid forward and reverse logistics, translating manufactured products into actual workshop availability. Without this layer, parts produced elsewhere would neither be reliably matched to the correct vehicle nor delivered efficiently to workshops and customers. An average parts wholesaler carries between 100,000 and 300,000 SKUs across a broad multi-brand assortment, and distributors are increasingly professionalizing independent repair through the kind of integrated digital platforms described in the interview below.

Europe had around 48,500 distribution outlets in 2025, up roughly 4 % from 2021. ▶ Employment declined over the same period, putting pressure on distributors to raise productivity and increasingly turn to scalable digital processes. This reinforces the role of distributors as coordination and scaling platforms for the independent aftermarket. Distributors have a high impact on running costs, through competitive sourcing, pricing transparency, and efficient procurement, and a medium-to-high impact on residual values, since reliable parts access keeps later-lifecycle vehicles economically repairable. Their impact on availability is high, through fast parts delivery, shorter repair cycles, and dense service infrastructure for workshops, and they increasingly act as a scaling platform for digital tools, diagnostics, training, circularity, and fleet services.

More outlets, fewer staff: Distributors are becoming leaner

Development of IAM parts distribution businesses 2021–2025





Source: Wolk & Nikolic After Sales Intelligence

Problem identification and diagnosis

The next stage, problem identification and diagnosis, determines repair scope, parts selection, and customer steering. It has a moderate impact on running costs, through accurate repair decisions that avoid over-repair or misdiagnosis, and a moderate impact on residual values, through better repair-versus-replacement decisions and more transparent vehicle condition assessments. Its impact on availability is high, since faster fault identification shortens repair cycles and speeds return to operation. Diagnostics, digital tools, and accumulated repair intelligence are increasingly enabling predictive maintenance, better repair solutions, and higher first-time-fix rates.

Repair and maintenance

Executing repair, maintenance, and installation with direct customer interface and local delivery has a high impact across all three dimensions: on running costs through competitive labor pricing and efficient execution; on residual values through preserved vehicle condition and longer usable lifetime; and on availability through local access and reduced downtime. This is also where the IAM anchors local employment, customer trust, and proximity, ensuring that its value creation is delivered locally across Europe.

INDUSTRY PERSPECTIVE

The evolving role of international trading groups

International trading groups (ITGs) have traditionally helped distributors achieve scale and negotiate better purchasing conditions. Today, their role goes much further. ITGs increasingly transform fragmented local capabilities into scalable international support networks, enabling distributors to access services, technologies, and specialized partners in areas such as data, diagnostics, logistics, fleet services, and digital tools. One leading ITG leverages its network of 118 shareholders across 106 countries to connect distributors with specialized aftermarket service providers. Through structured access to around 200 services, including diagnostics support, data solutions, logistics, and workshop concepts, it reduces adoption barriers for independent distributors and helps workshops benefit from capabilities that would be difficult or inefficient to develop independently.

> **"ITGs create scale advantages for independent distributors in a market where technology, data, and service quality are increasingly decisive."**
>
> Garage Concepts Manager
> Leading Global ITG



Interview

Sylvia Gotzen
Chief Executive at FIGIEFA

Industry perspective:
Building the digital backbone of the independent workshop

Distributors used to be thought of as warehouses and delivery vans. How has that changed?

SYLVIA GOTZEN: That picture is out of date. Across Europe, independent parts distributors now offer workshops a broad portfolio of products and services. Their digital platforms cover parts identification, ordering, diagnostics, and technical information, complemented by technical support, training, workshop concepts, marketing assistance, and business advisory services. Technical assistance and remote diagnostic services are good examples: specialist expertise is now available on demand, so even the smallest independent and authorized workshops in rural areas can access the multi-brand capabilities needed to service increasingly complex, software-defined vehicles.

What does that mean in practice for an independent workshop?

It means access to integrated multi-brand parts assortments, common diagnostics and information platforms, frequent deliveries, technical support, training, and remanufactured and reused parts. By accessing these through a distributor or trade group, independent workshops can focus on repairing vehicles, serving customers, and growing their business.

Why does this matter for the IAM as a whole, not just for one distributor's customers?

A broad portfolio of products and services, combined with a dense distribution network throughout Europe, enables a highly fragmented network of multi-brand workshops to compete effectively with vehicle manufacturers' authorized networks. Distributors help create the scale, reach, and coordination that individual workshops could not achieve alone, while preserving the diversity and entrepreneurial character of the independent aftermarket. The result is choice, affordability, and accessibility for vehicle owners. FIGIEFA's mission is to keep the regulatory framework supportive by promoting a level playing field for access to parts, technical information, vehicle functions, and data, so independent operators can compete today and build the next generation of digital, connected, and data-driven services for vehicle owners and fleets.

> **"The future of the independent aftermarket will be won by those who combine data, logistics, and digital tools into one seamless workshop ecosystem."**

Photo: FIGIEFA

Risks and opportunities



3

Chapter 2 showed how the IAM creates value at every stage of the chain. But that contribution is not guaranteed as four forces reshape how value is created: vehicle technology, as ADAS proliferates and electrification pushes battery electric vehicles and plug-in hybrids from roughly 11 % of Europe's light vehicle parc in 2025 toward 37 % by 2035; tightening EU regulation on data access, including the Motor Vehicle Block Exemption Regulation; the entry of new manufacturers, with Chinese OEMs forecast to reach around 15 % of new-vehicle sales in Europe by 2035; and shifting customer expectations for faster, more digital service.

Future value creation will depend on protecting existing strengths while building new capabilities across six areas: Europe-based value creation, workshop capability, software-defined vehicles, AI-driven efficiency, customer-facing service models, and circularity. ▶ J

Some of these shifts threaten established value pools and require defensive action. Others create new growth opportunities and reinforce the IAM's role in Europe's mobility system and wider economy. Across all six, the central question is the same: can the IAM

J Six disruptions that will reshape the independent aftermarket
Key threats and opportunities for the IAM

Threats

Erosion of Europe-based aftermarket value creation
Value creation risks shifting outside Europe, requiring investment in logistics, automation, and resilient supply chains.

Vehicle complexity outpacing workshop capabilities
EVs, ADAS, and SDVs require new skills, tools, and certifications to keep independent workshops competitive.

Software-defined vehicles shifting value upstream
Data, diagnostics, and software access become repair gatekeepers, increasing OEM control over value capture.

Opportunities

AI-driven efficiency across the value chain
AI improves diagnostics, logistics, pricing, and repair knowledge, reducing downtime and inefficiencies.

New customer-facing service models
Convenience and fleet services create growth opportunities through digital, standardized, and network-based offerings.

Remanufacturing and circularity
Circular parts create new value pools, reduce dependency on new parts, and strengthen European value creation.

Source: Roland Berger

continue to deliver affordable mobility, consumer choice, vehicle availability, and industrial resilience for Europe? The outcome will depend both on the capabilities IAM participants build and on the conditions that support effective competition across channels.

3.1/ Risk 1: Erosion of Europe-based aftermarket value creation

A substantial share of aftermarket parts production already sits outside Europe. International sourcing is an established feature of the market, rather than the risk itself. The real risk is further erosion of Europe-based value-adding capability. Distribution remains a major source of European value even when parts are manufactured elsewhere, through parts identification, quality assurance, warehousing, logistics, and technical support that connect global supply to local demand. Without sustained productivity gains and investment in both manufacturing and distribution, Europe risks losing further industrial value and becoming more dependent on non-European supply chains. Geopolitical uncertainty and shifting trade policy sharpen this risk.

Resilience does not require full localization. The IAM's current model, combining diversified, transparent sourcing with competitive European capability in logistics, distribution, and service, already delivers it. Beyond repair execution, this capability sustains industrial employment, sourcing expertise, and distribution resilience across Europe's wider economy. The risk of erosion falls hardest on distributors, through margin pressure from imports, and on workshops, through sourcing traceability and liability exposure. Parts manufacturers face pressure to automate and specialize and consumers risk longer lead times if sourcing fragments.

The IAM is already responding: investment in innovation is projected to rise from an average of 3.8 % of revenue in 2024 to 5.5 % by 2030. Manufacturing and supply chain account for the largest share of that investment, cited by 68 % of respondents, followed by inbound logistics (62 %) and outbound logistics (57 %). ▶ K

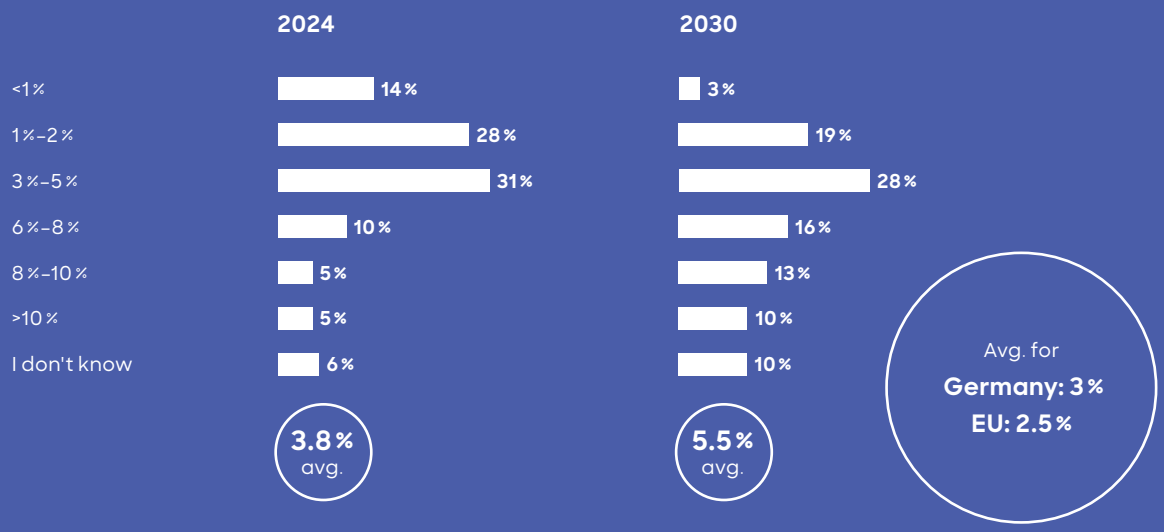
Priorities

- Investment in world-class logistics, automation, and digital supply chain capability
- Productivity gains across production, sourcing, inventory, and distribution
- Diversified local and international sourcing paired with resilient European logistics and service
- Scaled European remanufacturing and circular parts models to add cost, resilience, and sustainability advantages

K Innovation investment is accelerating quickly across the aftermarket

Investment in innovation by the IAM[1]
[2024 vs. 2030]

"How much do you invest in innovation today and how much do you expect to invest in 2030 as a percentage of your revenue?" [n = 382; % of revenue]



Areas of innovation
[% of respondents]

"What areas is your innovation focused on?" [n = 382]



1 Investments include new technologies, digital tools, and systems that enhance business operations and customer interactions 2 Connected car solutions for workshops, subscription-based parts, etc.

Source: Leibniz Centre for European Economic Research (ZEW), European Commission, FIGIEFA & Roland Berger IAM Panorama Survey

INDUSTRY PERSPECTIVE

Strengthening Europe's competitiveness through logistics innovation

A leading IAM distributor's advanced logistics platform shows how logistics innovation can strengthen the competitiveness and resilience of the independent aftermarket. The case demonstrates that leading IAM distributors are not only parts wholesalers but operators of advanced logistics infrastructure. Its logistics center combines 38,000 square meters of warehouse space, including 20,000 square meters dedicated to automation, with 120,000 SKUs, 3,000 meters of conveyors, and an automated shuttle storage system with 120 shuttles across 24 levels. The facility can process up to 60,000 order lines per day. This enables late-day orders to be delivered to workshops the following morning, improving parts availability and reducing repair downtime. Beyond operational efficiency, the platform illustrates how IAM players invest in world-class logistics capabilities that keep value creation, operational know-how, and supply chain resilience anchored in Europe.

> **"Innovation is not limited to vehicle technology. It also happens in how we move millions of parts every day, in ways that strengthen Europe's competitiveness and supply chain resilience."**
>
> President
> Leading European Wholesale Distributor

3.2/ Risk 2: Vehicle complexity outpacing workshop capabilities

Electrification, ADAS, connectivity, and software-defined vehicles are increasing the technical complexity of repair and maintenance. This is a capability challenge, distinct from the data access questions raised in Risk 3. Independent workshops need new capabilities in high-voltage systems, battery diagnostics, ADAS calibration, software-supported repair, and cybersecure service processes. Without training, equipment access, and certification, parts of the workshop base risk falling behind. Capability gaps could then shift complex repair activity toward authorized networks, even where workshops are otherwise well positioned to serve customers. Smaller workshops are particularly exposed, since capability upgrades often require high upfront investment, specialized tools, or brand-specific access processes. What's at stake is significant: workshop capability determines whether competition, consumer choice, and affordability can be preserved in EVs, ADAS, and software-related repair.

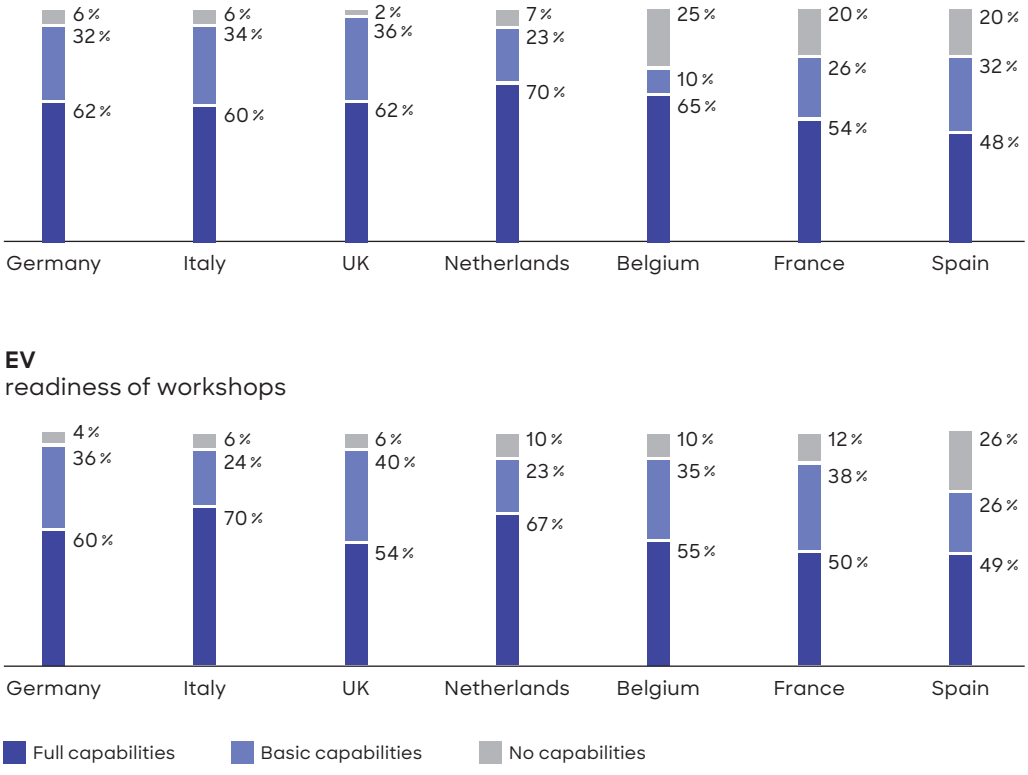
The transition is already underway, but unevenly. Full EV repair capability among workshops ranges from 49 % in Spain to 70 % in Italy, and as many as 26 % of Spanish workshops report no EV capability at all. ADAS-readiness paints a similarly varied picture. Despite the progress shown, gaps of this size suggest there is still meaningful ground to cover. Closing these gaps will determine whether the IAM keeps pace with vehicle technology or cedes complex repair work to authorized networks by default. ▶L

Priorities

- Large-scale technician training in EVs, ADAS, diagnostics, and software-related repair, backed by structured qualification and certification pathways
- Distributors, ITGs, and workshop networks strengthened as capability builders, providing training, tools, and technical support
- Capability upgrades reaching smaller independent workshops as well as larger chains
- Parts manufacturers supplying repairable, diagnosable, well-documented components for emerging vehicle technologies
- Secure, economically viable access to repair information, vehicle data, diagnostic tools, and software functions, including recognition of remote service suppliers as a capability channel

L EV and ADAS readiness is rising across Europe, but unevenly

EV and ADAS repair capabilities of workshops [%]



Source: Roland Berger Aftermarket Pulse 2025

INDUSTRY PERSPECTIVE

Closing the EV skills gap in the independent aftermarket

Electrification is changing the requirements for vehicle repair, and independent workshops increasingly need capabilities in high-voltage safety, battery systems, EV diagnostics, and software-supported repair. A large-scale training platform run by a leading IAM parts distributor addresses this directly, aiming to upskill more than 24,000 technicians across 12 European countries through practical courses, classroom training, and digital modules covering high-voltage safety, de-energizing procedures, diagnostics, and certification.

In the UK alone, the program offers 12 practical EV modules as part of more than 120 accredited courses, with capacity for more than 2,100 EV places planned for 2026. By systematically preparing technicians for EV repair, the initiative helps preserve consumer choice, maintain affordable repair options, and keep independent workshops competitive as Europe's vehicle parc electrifies.

> **"We're training more than 24,000 technicians across 12 countries to work safely and confidently on EVs. That scale is what keeps independent repair a real choice as vehicles electrify."**
>
> Executive Managing Director
> Leading European Wholesale Distributor

3.3/ Risk 3: Software-defined vehicles shifting value upstream

Vehicle data, diagnostics, software functions, and digital authorizations are increasingly becoming gatekeepers for repair and maintenance as OEMs strengthen control over vehicle interfaces and software environments. Even where access formally exists, it can be hard to use in practice, slowed by fragmented OEM portals, certification requirements, and added fees. Software is also becoming central to routine work: coding, calibration, and function activation now feature even in basic mechanical repairs.

As a result, diagnosis is becoming a central point of value capture. Without practical access to data and software functions, independent workshops risk losing high-value activities and being reduced to execution-only roles. Non-OEM-branded parts risk exclusion from digitally controlled repair processes, and parts manufacturers risk growing dependency on software-coded components and OEM-controlled compatibility requirements. Competition, affordability, uptime, and consumer choice all depend on whether this access is secure, practical, and economically viable.

Priorities

- Non-discriminatory, usable, and economically viable access to vehicle data, information, diagnostics, and software functions across brands
- Practical usability, not just formal access, avoiding excessive cost, latency, certification barriers, or limited interoperability
- Independent execution of software-related repairs, including coding, electronic control unit (ECU) programming, updates, calibration, and function activation
- Recognition of remote service suppliers as a channel through which workshops can access OEM-level software capabilities without full in-house expertise across every brand
- Continued competition in spare parts, with Tier-1 suppliers able to sell under their own brands and independent producers able to develop interoperable parts

INDUSTRY PERSPECTIVE

Bringing OEM-level software capabilities to independent workshops

As vehicles become more software-defined, individual multi-brand workshops cannot efficiently maintain in-house expertise across every manufacturer-specific software environment. Remote service supplier (RSS) models address this gap by connecting local workshops to remote specialists for diagnostics, ECU programming, software updates, coding, calibration, and key programming.

Such suppliers provide workshops with a dedicated diagnostic interface, enabling remote specialists to access manufacturers' software and official platforms while vehicles remain at the local independent workshop.

These services cover all main vehicle brands and support coding, calibration, software updates, and key programming, typically on demand. Backed by extensive technical knowledge bases, they handle several hundred thousand requests annually from independent and authorized workshops. This demonstrates how RSS models can centralize scarce, brand-specific expertise and distribute it across independent workshop networks, lowering capability barriers while keeping repair execution and customer relationships local..

> **"With a 97% success rate across more than 90 brands, remote diagnostics let any independent workshop handle repairs that used to require a dealership visit."**
>
> Head of Workshop Services
> Leading European Wholesale Distributor

3.4/ Opportunity 1: AI-driven efficiency across the value chain

Artificial intelligence, including generative AI, can turn the IAM's fragmented data – spanning diagnostics, parts, logistics, and workshop interactions – into actionable intelligence. Use cases already emerging include predictive maintenance, automated parts identification, re-engineering, repair guidance, demand forecasting, and smarter inventory planning. The opportunity rests on a genuine asset: the IAM has access to a large base of practical repair experience built up over decades, which AI can turn into a scalable competitive advantage. Applied well, this can raise first-time-fix rates, shorten downtime, and lower operating costs through better inventory, routing, and procurement decisions.

INDUSTRY PERSPECTIVE

Turning decades of repair experience into AI-powered workshop intelligence

Every repair carried out by an independent workshop generates valuable technical knowledge. Over decades, this has built a large base of practical experience, but the sheer volume of information makes it increasingly difficult for technicians to find the right solution quickly. A leading technical support organization has transformed more than 2.1 million verified repair cases into a structured knowledge database covering over 120 vehicle makes, 2,800 models and 18,500 vehicle versions, including symptoms, fault codes, root causes, and proven repair solutions.

Artificial intelligence makes this knowledge base easier to use. Instead of manually searching millions of records, AI identifies relevant repair cases within seconds, helping technicians diagnose faults faster, reduce trial-and-error repairs, and improve first-time-fix rates. The case shows how the IAM can turn decades of practical repair experience into a scalable competitive advantage.

> **"Two million repair cases, searchable in seconds, means every technician can draw on the collective experience of the whole network, not just their own."**
>
> Head of Key Accounts & Repair Services
> Leading European Wholesale Distributor

Priorities

- Investment in analytics, AI, and digital capabilities across distributors, diagnostics providers, and workshop networks
- AI embedded into core operational processes rather than treated as a standalone tool
- AI tools combined with human technical expertise, to preserve reliability, safety, and trust
- Shared knowledge bases and technical support platforms that let smaller workshops benefit from scale
- Data access and interoperability across tools, platforms, and vehicle brands (see Risk 3)

3.5/ Opportunity 2: New customer-facing service models

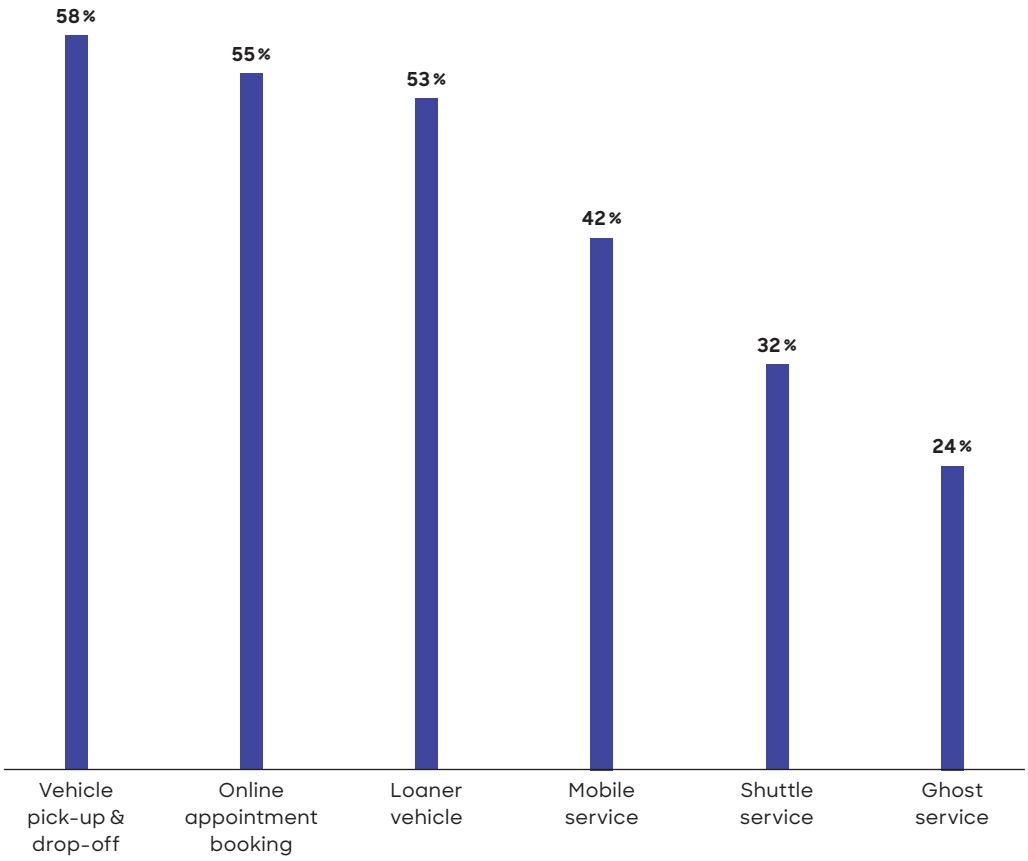
Rising customer expectations and the growing professionalization of fleet and mobility customers are creating demand for integrated, convenient, and standardized service models. Customers increasingly expect digital booking, fast repair, pick-up and drop-off, replacement mobility, and real-time status updates. Fleet customers add further requirements: predictable pricing, standardized processes, central billing, uptime management, and nationwide workshop coverage. This is opening growth opportunities for the IAM in fleet services and professional mobility segments that have historically been dominated by OEM-controlled channels. The IAM's network density, proximity, and multi-brand capability are strong starting points here.

Competition in these segments is shifting beyond parts prices and labor rates toward service experience, convenience, and uptime. No single workshop can meet fleet requirements alone, but distributor-led or platform-based models can supply the standardization and scale that fleets need. This gives workshops access to customers they could not otherwise serve independently, and lets distributors create value by coordinating standards, billing, processes, and workshop access. Done well, this also strengthens the IAM's broader system-level contribution, reducing downtime and improving repair access for consumers and fleets alike.

Research by Roland Berger confirms the trend: 58 % of workshops already offer vehicle pick-up and drop-off, while 55 % offer online appointment booking, and 53 % offer a loaner vehicle, though adoption drops sharply further down the list, with the least common service, "ghost service," offered by only 24 % of workshops. This is a strong base to build on, but there remains significant potential for expansion. ▶M

M IAM convenience services are spreading, but real gaps remain

Convenience services offered by IAM workshops



Source: Roland Berger Aftermarket Pulse 2025

Priorities

- End-to-end customer journeys, including digital booking, transparent updates, pick-up/drop-off, and replacement mobility
- Scalable, standardized service propositions for fleet and mobility customers, including central billing and nationwide coverage
- Data and platform tools to coordinate service quality, repair times, pricing, and customer communication
- Convenience and fleet models accessible to both larger workshop networks and smaller independent workshops

INDUSTRY PERSPECTIVE

Opening the fleet market to independent workshops

Fleet maintenance has traditionally been difficult for individual independent workshops to address. Large fleet operators require consistent service standards, transparent communication, predictable pricing, central billing, and nationwide workshop coverage – requirements that are hard for a single workshop to meet alone.

A dedicated fleet service platform operated by a wholesaler addresses this by connecting around 30 leasing companies and fleet operators with a coordinated network of roughly 250 independent workshops, providing common operating standards, central communication, uniform billing, repair specifications based on manufacturer data, and agreed repair times. Fleet operators gain access to a broad network capable of delivering consistent service quality, while independent workshops can enter an attractive, growing market segment that would otherwise be difficult to reach. The case shows how distributor and platform-led models can help the IAM compete for professional mobility services.

> **"Fleet operators want one set of standards and one invoicing relationship, not a different repair arrangement in every region. That's exactly what a coordinated independent network can deliver."**
>
> Director of Commercial Excellence
> Leading Wholesale Distributor Benelux

3.6/ Opportunity 3: Remanufacturing and circularity

Reused, refurbished, and remanufactured parts can reduce repair costs, extend vehicle lifetimes, and lower dependency on newly produced parts, aligning affordability, sustainability, and European value creation. Battery regulation, recycling requirements, and sustainability expectations are reinforcing the relevance of circular aftermarket models. Circularity builds directly on existing IAM strengths in reverse logistics, parts identification, quality management, and workshop proximity. Circular parts are particularly valuable for affordable repair in later lifecycle stages, where new OEM parts can make repairs uneconomic. They also strengthen residual values by keeping vehicles repairable for longer, and reduce waste and resource consumption in support of Europe's sustainability objectives. For workshops and consumers, though, circular parts only scale if quality, traceability, warranties, and availability are professionally managed – an area where wholesale distributors can play a central role.

There is real momentum here: the average share of remanufactured components in wholesale distributors' sales is projected to rise from 10 % today to 17 % by 2030, with reused components following a similar path, from 4 % to 6 %. ▶N

Priorities

- Scaled industrial remanufacturing and refurbishment capability
- Efficient reverse logistics, core collection, and sorting systems
- Circular parts integrated into mainstream catalogues, ordering systems, and workshop workflows
- Quality standards, warranties, traceability, and transparency to support consumer and workshop trust
- Local industrial activity, employment, and technical capability sustained through European-based remanufacturing

INDUSTRY PERSPECTIVE

Building a circular parts ecosystem for high-quality, cost-efficient repair

Circular parts can play a larger role in the independent aftermarket, covering both reused parts from end-of-life vehicles and remanufactured components. The challenge is that workshops and customers need confidence in quality, traceability, availability, and warranty.

A leading IAM group's circular parts program addresses this by turning circular parts into a professionally managed product offering for independent repair. It launched with more than 30,000 recycled car parts, and the broader network reached more than 300,000 reused items shortly after.

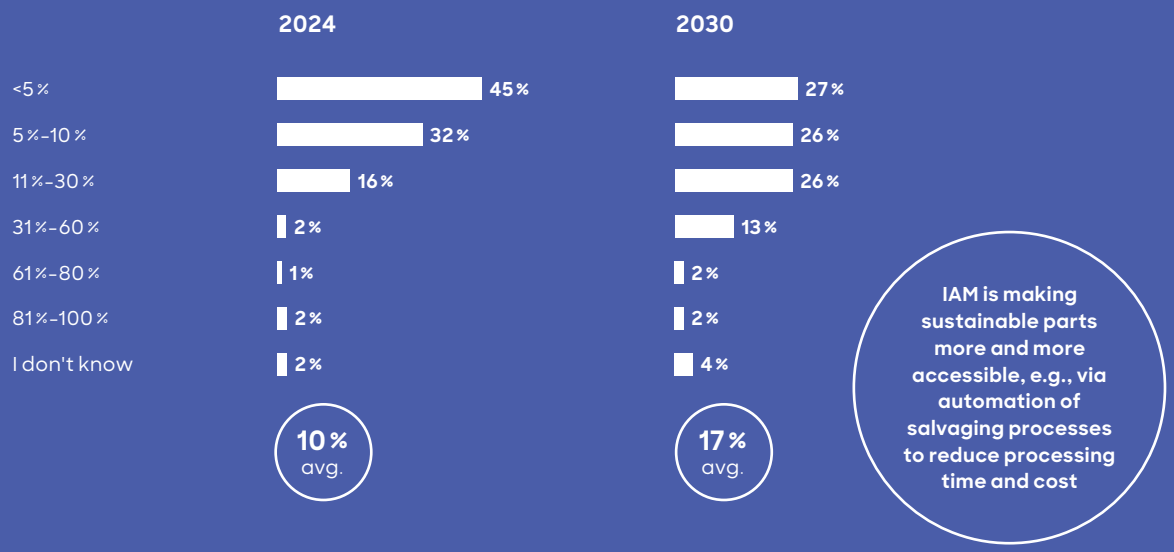
Dedicated recycling capacity supports this at scale, including one facility designed to process nearly 8,000 vehicles per year and supply more than 75,000 circular parts annually. By organizing reverse logistics, sorting, testing, packaging, and redistribution, wholesale distributors create the backbone needed to scale reused and remanufactured parts. The case shows how circular parts can become a practical lever for greater affordability, sustainability, and European value creation for the IAM.

> **"Circular repair will only scale if workshops and customers can trust the parts they receive. Industrializing circular parts makes them easier to source, trace, and install."**
>
> CEO
> Leading European Wholesale Distributor

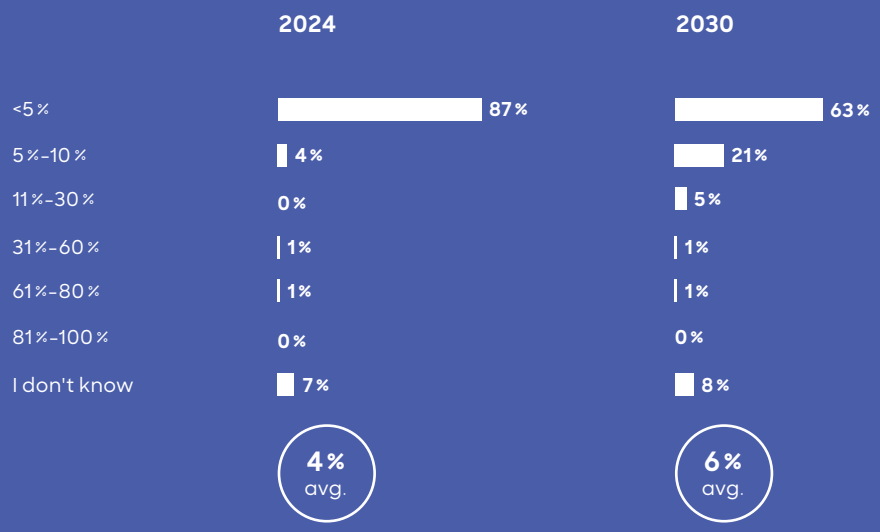
N Share of remanufactured parts set to grow considerably by 2030

Share of sustainable parts in sales
[% of respondents]

"What share of your sales is made up of remanufactured components today (2024) and what do you expect it to be in 2030?" [n = 382]

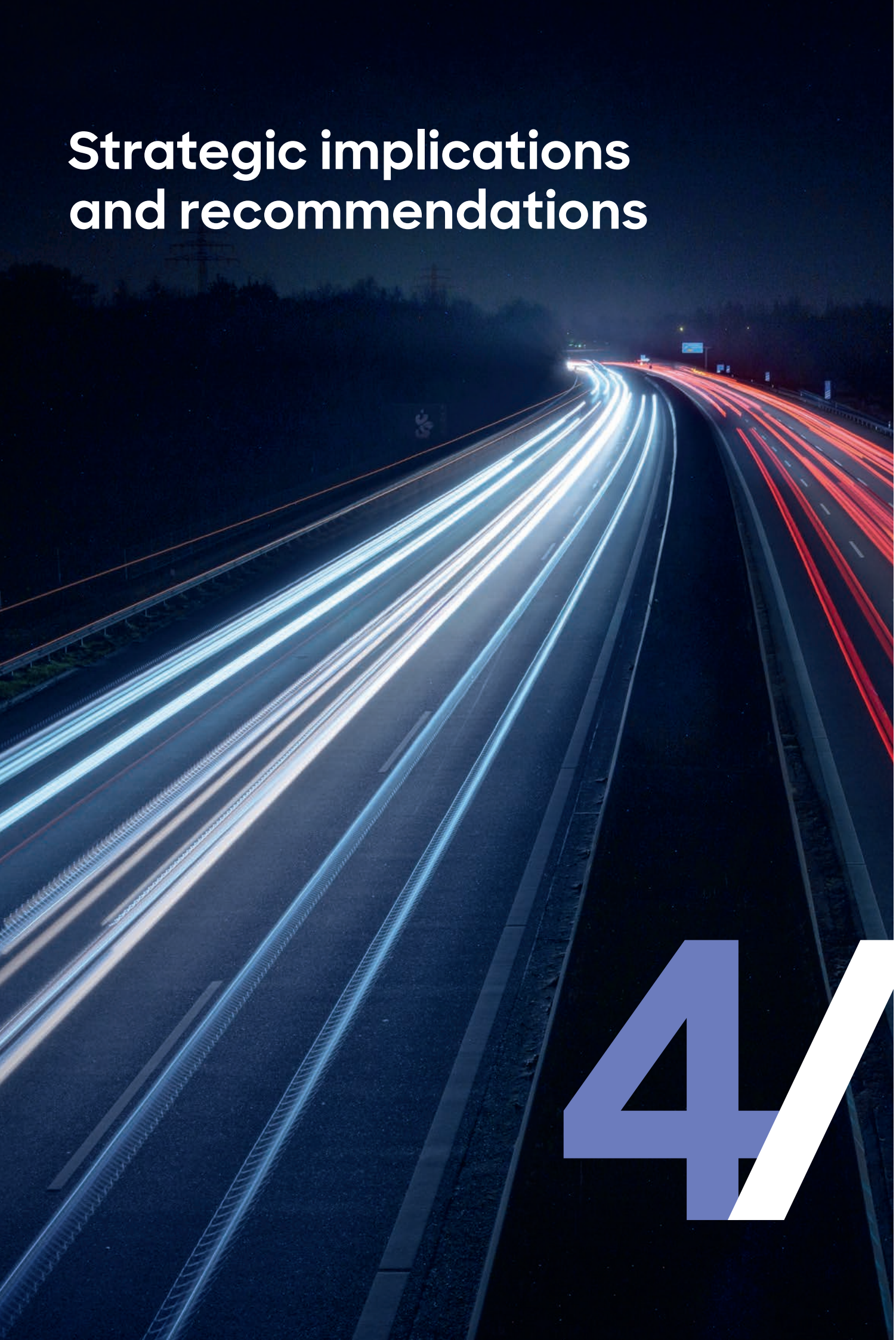


"What share of your sales is made up of used components today (2024) and what do you expect it to be in 2030?" [n = 382]



Source: FIGIEFA & Roland Berger IAM Panorama Survey

Strategic implications and recommendations



4

The shifts examined in this report, from software-defined vehicles to AI, customer expectations, and circularity, will not affect all stakeholders equally. The IAM's future contribution to Europe's mobility system and wider economy depends on preserving its core strengths: proximity, consumer choice, cost efficiency, and multi-brand capability. It also depends on building new capabilities in data, software, diagnostics, AI, EV repair, and customer-facing service.

Responsibility for this transition is shared. Market participants, OEMs, suppliers, distributors, and workshops determine the pace and scale of capability investment and commercial models. Regulation, in turn, establishes the conditions for safety, cybersecurity, data access, and competition. The relevant test is whether the resulting aftermarket remains competitive, innovative, and consumer-friendly, and continues to contribute to Europe's mobility system and wider economy. Preserving today's exact market structure is not the goal in itself. The following sets out the priorities ahead for each stakeholder group.

4.1/ OEMs

- **Build a mutually beneficial lifecycle partnership with the IAM:** Treat the IAM as a lifecycle value partner that strengthens residual values, customer confidence, and vehicle attractiveness, rather than only as a competing service channel.
- **Enable fair and usable access to data and functions:** Provide secure, standardized and economically viable access to repair-relevant data, diagnostics, and software functions.
- **Use the IAM to scale and stay competitive:** A dense European IAM network complements authorized repair capacity, improves service coverage, and strengthens competitiveness against new entrants.

4.2/ Suppliers

- **Scale circular and remanufacturing solutions:** Build industrial remanufacturing, refurbishment, and reverse logistics capabilities to strengthen affordability, sustainability, and European value creation.
- **Strengthen European footprint and resilience:** Focus European capacity on automation, specialization, and quality-critical components where resilience and competitiveness matter most.
- **Collaborate more closely across the value chain:** Share repair-relevant information, technical support, and product intelligence with distributors and workshops, especially for EVs, ADAS, and software-related components.

4.3/ Distributors

- **Combine physical reach with digital scale:** Continue evolving from parts logistics providers into integrated platforms that connect availability, ordering, diagnostics, repair information, software access, and workshop workflows.

- **Lead on training, diagnostics, and fleet services:** Help workshops manage complexity by providing training, certification, tools, diagnostics, remote expert support, and standardized fleet service propositions.

- **Connect suppliers, workshops, and platforms:** Use distributor scale so smaller independent players can access capabilities they could not build alone.

4.4/ Workshops

- **Build EV, ADAS, and software capabilities:** Invest in high-voltage safety, battery diagnostics, ADAS calibration, and software-supported repair to stay technically competitive.

- **Use networks and specialization to manage complexity:** Leverage distributor, ITG, and workshop-network support instead of building every capability alone, and specialize where local demand justifies it.

- **Offer digital, convenient service models:** Strengthen customer relevance through digital booking, transparent communication, proactive updates, convenient service options, and participation in fleet-ready networks.

4.5/ Policymakers

- **Fair access and competition:** Non-discriminatory, secure, and practical access to repair-relevant data, diagnostics, repair and maintenance information, and software functions is fundamental to effective aftermarket competition in the era of software-defined and AI-defined vehicles. Access rights require regular review and updating to reflect technical progress.

- **European resilience and circularity:** Local manufacturing, remanufacturing, refurbishment, recycling, and reverse logistics capacity contribute directly to European value creation and supply chain resilience. This capacity requires targeted investment and harmonized standards to scale further.

- **Balancing safety, cybersecurity, affordability, and choice:** Regulation for connected and software-defined vehicles needs to protect safety and cybersecurity without creating disproportionate barriers to independent repair.

4.6/ Outlook

This study confirms that the IAM is a critical part of Europe's industrial and economic fabric, worth an estimated EUR 100 billion in direct market value today. Its system-level contribution is considerably larger: around 314 billion additional kilometers of mobility each year, EUR 65 billion in additional new-vehicle spend through stronger residual values, and EUR 23 billion in economic value from reduced vehicle downtime.

The independent aftermarket now stands at an inflection point. Electrification, software-defined vehicles, new market entrants, and shifting customer expectations are reshaping the conditions under which this value is created. The coming years will determine whether the IAM's contribution grows or erodes.

For IAM players, this means closing the EV and ADAS capability gaps this study has documented, through continued investment in training, diagnostics, and digital service models. For OEMs, it means treating the IAM as a lifecycle partner rather than a competing channel, as a strong IAM protects residual values and strengthens their own competitiveness. For policymakers, it means further closing the gap between formal access rights and what independent operators can use in practice.

The aftermarket is already changing. What remains uncertain is whether the value it creates today is preserved and expanded, or allowed to slip away by default. The actions taken now, by industry, OEMs, and policymakers, will decide which future Europe faces.

"The aftermarket is already changing. What remains uncertain is whether the value it creates today is preserved and expanded, or allowed to slip away by default."

Daniel Rohrhirsch, Senior Partner at Roland Berger

Methodology

9 % additional annual kilometers driven each year (314 billion km): Calculated by applying the IAM share of maintenance work and an assumed 30-40 % price differential between IAM and OEM-controlled maintenance to the annual mobility budget of European vehicle owners, translating lower cost per kilometer into additional affordable mileage.

EUR 65 billion in additional new-vehicle spend per year: Calculated by applying the IAM share of repair work and the price differential between IAM and OEM-controlled repair to lifecycle repair spend, translating lower repair costs into protected residual values and additional consumer budget for vehicle replacement.

EUR 23 billion in annual economic value: Calculated by estimating time savings from shorter travel distances to workshops, faster spare parts availability, and higher workshop accessibility, then translating these saved hours into economic value using an opportunity cost per hour of EUR 25, reflecting the "lost" value added due to vehicle downtime.

EUROPE 34

Unless otherwise stated, "Europe" refers to Europe 34: Albania, Austria, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, North Macedonia, Norway, Poland, Portugal, Republic of Serbia, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom.

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Further reading

- *AUTOMOTIVE AFTERMARKET PULSE 2025*
- *CONSOLIDATION IN SOUTHERN EUROPE'S AUTOMOTIVE AFTERMARKET*
- *AFTERMARKET PERFORMANCE RADAR: YOUR JOURNEY TO EXCELLENCE STARTS HERE*



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FIGIEFA is the international federation of independent automotive aftermarket distributors. Its members represent independent distributors and wholesalers of automotive replacement parts and components and their associated repair chains. FIGIEFA brings together 19 trade associations from 18 countries and five international trade groups. FIGIEFA's aim is to make sure that European Union and United Nations legislation impacting the automotive aftermarket ensures free and effective competition in the market for vehicle replacement parts, servicing and repair.

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