AA-STARS | Issue 5

Study paper

Automotive Aftersales Shop Index

November 2022

How to Make Better Decisions – With Speed4Trade Analytics

Speed4Trade

www.speed4trade.com

Content

Summary

- Market research: > 2.000 online shops | > 3.700 Ebay shops
- Market segment: Automotive aftersales B2C | CAR | Germany
- Market dynamics: Annual survey & update
- Market data: Objective algorithm | Customer centric view

AA-STARS – Benchmark with market dynamics

Those who want to be successful in online retail must not only rely on outstanding digital retail solutions, but also know and observe the market and competition in order to be able to derive appropriate options for action. From our point of view, it is about making better decisions based on reliable data.

To do justice to this, Speed4Trade established **the automotive aftersales shop index AA-STARS** more than 4 years ago **as a benchmark**, which we would like to bring closer to you here already with the fifth edition of our study paper. The study paper is intended to serve as an initial orientation aid with the excerpt of the top 25 rankings.

Our **fifth issue** again contains innovations:

Demand decline for online shops for Mar - Aug 2022 by 3.6 % compared to the same period last year.

- Online shop market development September 2021 to August 2022 compared to the previous year
- Spotlight: Inclusion of **e-mobility charging solution providers** in AA-STARS
- Spotlight: **Car dealership groups aftersales**
  Automotive aftersales of vehicle manufacturers and the top 100 car dealership groups with their Ebay activities

More than 50 % of the top 100 car dealership groups in Germany are active on Ebay.

When it comes to the automotive aftermarket and digital trade solutions for B2C and B2B, Speed4Trade is always mentioned as a relevant contact. Not only is our many years of technical expertise from diverse projects in demand, but also our market knowledge. This makes us a valuable business partner for all market participants in the automotive aftersales industry (OEM/IAM parts manufacturers, parts wholesalers, car dealers, workshops, pure online retailers or associations).

Head of Data Management & Analytics

Speed4Trade GmbH

Motives for the study

Motivation

During the coronavirus crisis the aftersales market proved to be more resistant to sales losses than other consumer markets[1], especially if digital solutions could be used to serve the sales market.

The market recovered in Q4/21 and at the beginning of Q1/22 by 2-digit percentage rates. Supply chains also recovered, but at a slower rate. Who was thinking about the next crisis that currently seems to be leading us into a recession[2]?!

From one crisis to the next?

How is the beginning of the recession affecting the individual segments in automotive aftersales?

The fifth issue of AA-STARS focuses on an analysis of the market and how it is responding to the new globalisation crisis that is currently exacerbated by geopolitical events.

Two-thirds of automakers do not enable accessories or spare parts to be bought directly online.

How are automakers (brands) supporting the aftersales business of car dealerships?

In addition, every year we select one or two topics to look at in a **Spotlight**. This year we analysed the extent to which car dealerships or dealership groups are using digital sales in the aftersales market. When looking at the online aftersales activities of car dealerships, the place to start is with the automakers. To introduce our Spotlight feature "Car dealership group aftersales", we analysed how automakers are supporting digital sales of spare parts and accessories. It's interesting to compare the manufacturers' orientation with the digital aftersales activities of the dealerships. To that end we look at their activities on the online marketplace Ebay, as this takes us away from the dependence of manufacturers on online shops and gives us an independent picture.

How do the top 100 dealership groups use Ebay for automotive aftersales?

More than half of the top 100 dealership groups are active on Ebay.

We also looked at the activities of the top 100 dealership groups as well as those of the automakers on Ebay. The results are surprising.

Providers on the automotive after-market can draw the following benefits from this study paper: They receive information about competitors in B2C online trade – about online shops and marketplaces alike. This means that they obtain information about market distribution and their own position. They can therefore assess their own potential and plan measures on that basis.

[1] https://www.speed4trade.com/downloads/Speed4Trade_AA-STARS_4_Study-paper_Oct-2021.pdf, p. 10 et seq.
[2] In August 2022, the GfK Consumer Climate Index fell to an index value of -30.9 points.

Motives for the study

Compared to previous studies, Speed4Trade opts for an alternative perspective for the advice it provides. That's why we developed AA-STARS. We are making our benchmarks available to the market in this study in order to encourage more meaningful dialogue with market participants.

Results – Top 25 rankings

- **Overall shop ranking: summary of the segments P/T/S in an overall ranking**
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Spotlight: E-mobility shops
- Spotlight: Car dealership groups in aftersales

AA-STARS 5 – The market development

AA-STARS 5
September 2021
to
August 2022

The AA-STARS study looks at the 12 months from September of the previous year to August of this year.

We compare the data of the B2C online shops in the ranking[3] (n = 1,265) with the data from the previous year, in order to derive conclusions on the performance of the market.

The growth in demand in the first half of the year secured an annual increase of 5.1% compared to the same period of the previous year.

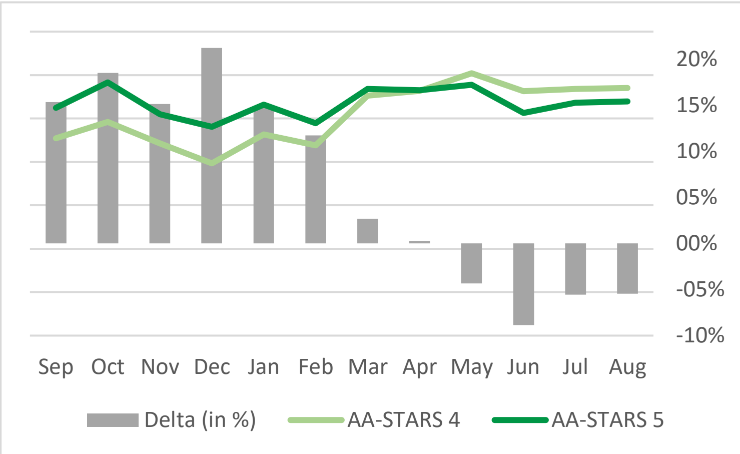

Fig.: Development in demand (measured in visitor frequency) with the percentage deviation from the same month of the previous year (n=1,265).

Slump in growth in the second half of the year of AA-STARS

Demand has been declining since March 2022. The double-digit growth rates in the first half of the year (H1 = Sep. to Feb.) of +16.1% fell to -**3.6% in the second half of the year** (H2 = Mar. to Aug.) compared to the same period of the previous year for the shops in the ranking. The **top 25** were less volatile, **at +11.2% (H1) and -1.3% (H2)**.

However, overall the digital B2C sales market achieved growth in demand of 5.1% over the course of the year compared to the previous year (AA-STARS 4). But the top 25 shops grew more slowly than the market and only increased by 4.4%. The market share of the top 25 shops declined slightly by 0.3% points to 42.8%.

The prices also rose by 5.1% in addition to the increase in demand. According to GfK, the consumer climate further worsened again from August 2022 to October 2022 (from -30.9 to -42.8), but the forecast is slightly better in November 2022. The low seems to have therefore just been reached.

[3] Only shops with at least €50K annual revenue are taken into account for the ranking

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Are there differences in the market development for the range groups P/T/S?

The Parts range recorded an **increase in demand** of 6.9% compared to the previous year.

Looking at the individual range groups P/T/S[4] a differentiated picture emerges. The Parts range, as expected, recorded the lowest slump in demand in the second half of the year compared to the same period of the previous year. The Tyre range was highest. In the Specialized sector (accessories) we expected a greater decline. There may be differences here in the more specific sub-ranges, which we did not evaluate for this study.

The Tyres & Rims range experienced a **fall in demand** of 8.3% compared to the previous year.

Assortment group	Half year 1	Half year 2	Total
Parts	+ 16.7 %	- 0.9 %	+ 6.9 %
Tyres & Rims	- 1.1%	- 15.4 %	- 8.3 %
Specialized (accessories)	+ 22.8 %	- 2.5 %	+ 8.0 %

Percentage change from the previous year (comparison AA-STARS 4 to AA-STARS 5)

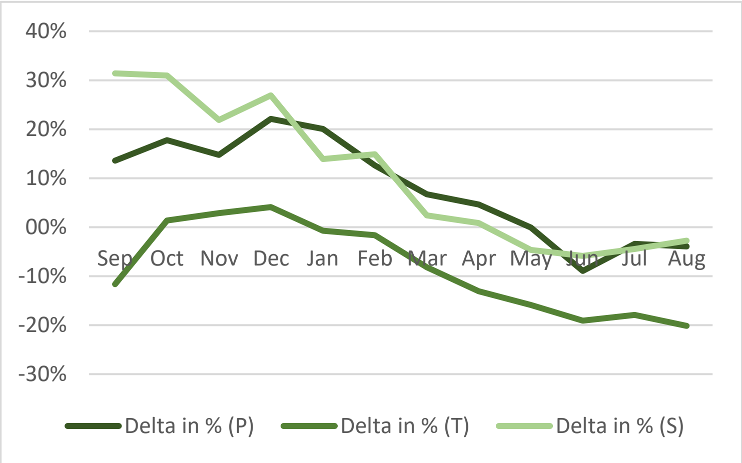

Fig.: Relative development in demand of three segments: Parts, Tyres & Rims and Specialized compared to the previous year (n = 1,265)

[4] P = Parts; T = Tyres & Rims; S = Specialized/Accessories in general

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Overall ranking: AA-STARS Online shops

Aside from www.elektroshopwagner.de (including e-mobility offers), the shop of the BMW car dealership Hubauer in particular made it into the top 25. The special providers www.kennzeichenbox.de (- 18 places) and www.wunschkennzeichen-reservieren.jetzt (- 25 places) dropped out of the ranking.

Autodoc.de expanded its lead further with a 38% increase in demand.

Motointegrator.de (Intercars) caught up, with an increase of 47% compared to the previous year.

Ranking index 2022	Change from previous years	Overall ranking Top 25 Automotive aftersales online shops	Range classification
1	-	www.autodoc.de	P
2	-	www.atu.de	P
3	-	www.kfzteile24.de	P
4	+5	www.campingwagner.de [*1]	S
5	-1	www.pkwteile.de	P
6	-	www.autoteiledirekt.de	P
7	-2	www.reifendirekt.de	T
8	-1	www.bandel-online.de	P
9	+8	www.mycarly.com	S
10	-2	www.atp-autoteile.de	P
11	-1	www.reifen.com	T
12	+4	www.motointegrator.de	P
13	-1	www.leebmann24.de	P
14	-1	www.felgenshop.de	T
15	-4	www.autoersatzteile.de	P
16	+2	www.goodyear.eu	T
17	-3	www.felgenoutlet.de	T
18	-3	www.kennzeichenking.de	S
19	Newcomer	www.elektroshopwagner.de [*1]	S
20	+7	www.hubauer-shop.de	P
21	-2	www.skandix.de	P
22	-	www.reifenleader.de	T
23	-3	www.autoteileprofi.de	P
24	-1	www.shop.ahw-shop.de	P
25	-4	www.kupplung.de	S

[*1] also includes the non-automotive after-sales range

Results – Top 25 rankings

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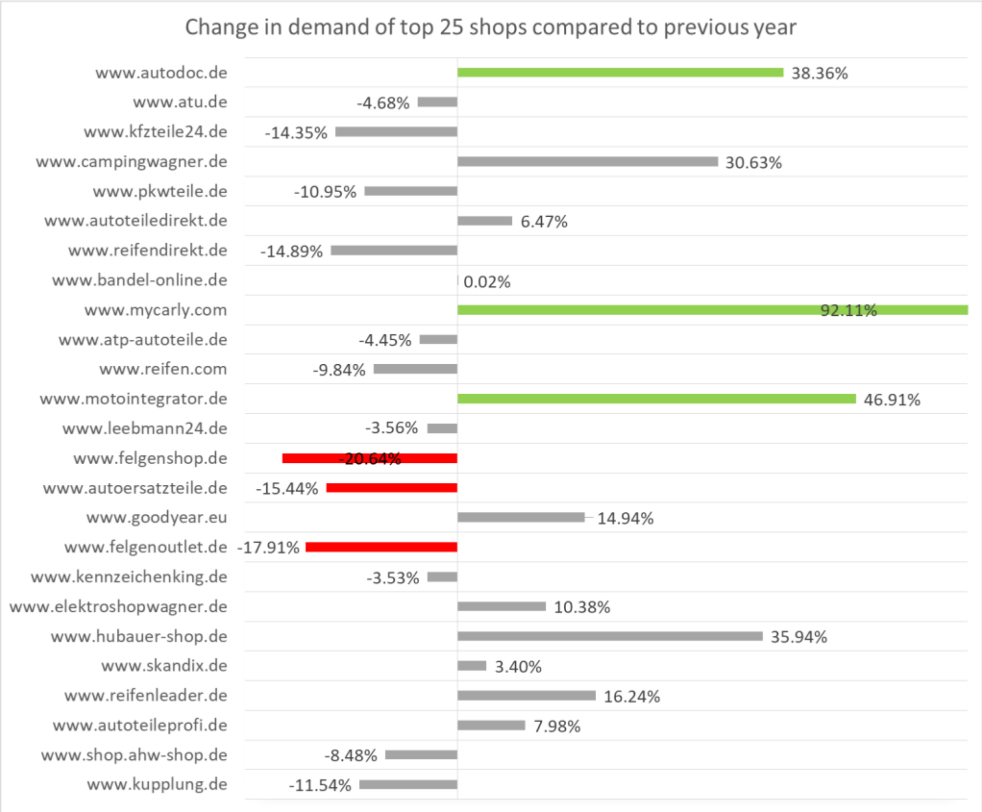
Only a few changes were seen in the top 25 rankings on the following pages. It is therefore interesting to see which market participants beat the market and which did not. This information is not found in the context of the overall ranking, but only in the segment-specific rankings, as every shop is assigned to a specific segment.

Autodoc continues to extend its leading position. But Motointegrator is also rising in the rankings. Mycarly is seen here as a special provider for vehicle diagnostics, with demand surprisingly doubling among the top 25.



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Online shop ranking | Segment "Parts"

www.sportfahrwerk-billiger.de (- 9 places), www.autoteile24.de (- 7 places; part of Kfzteile24 GmbH) and www.limora.com (- 4 places) fell out of the top 25 of the last report. With its original parts shop, Mercedes made it into the top 25. This is all the more impressive as this shop cannot even be found on the Mercedes brand page (no link, only identifiable via Google).

Among the top 25 online parts shops, 5 are run by car dealerships and 2 directly by automakers.

Ranking index 2022	Change from previous years	Overall ranking Top 25 Automotive aftersales online shops	Car dealership/ brand
1	-	www.autodoc.de	
2	-	www.atu.de	
3	-	www.kfzteile24.de	
4	-	www.pkwteile.de	
5	-	www.autoteiledirekt.de	
6	-	www.bandel-online.de	
7	-	www.atp-autoteile.de	
8	+2	www.motointegrator.de	
9	-	www.leebmann24.de	BMW
10	-2	www.autoersatzteile.de	
11	+4	www.hubauer-shop.de	BMW
12	-1	www.skandix.de	
13	-1	www.autoteileprofi.de	
14	-1	www.shop.ahw-shop.de	Volkswagen
15	+1	www.kunzmann.de	Mercedes
16	-2	www.online-teile.com *1	diverse
17	-	www.der-ersatzteile-profi.de	
18	+2	www.baum-bmwshop24.de	BMW
19	+3	www.myparto.com	
20	+1	www.rosepassion.com *2	
21	+3	*www.volkswagen-classic-parts.com* *4	*Volkswagen* *5
22	+17	www.ecdgermany.de *3	
23	+3	www.turbozentrum.de	
24	+3	*www.originalteile.mercedes-benz.de*	*Mercedes*
25	-7	www.pitstop.de	

*1 Various providers of OE parts *2 Foreign shop with a significant share of buyers from Germany
*3 also includes the non-automotive after-sales segment *4 previously www.volkswagen-classic-parts.de
*5 D2C by manufacturer (shown in italics)

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- Overall shop ranking: summary of the segments P/T/S in an overall ranking
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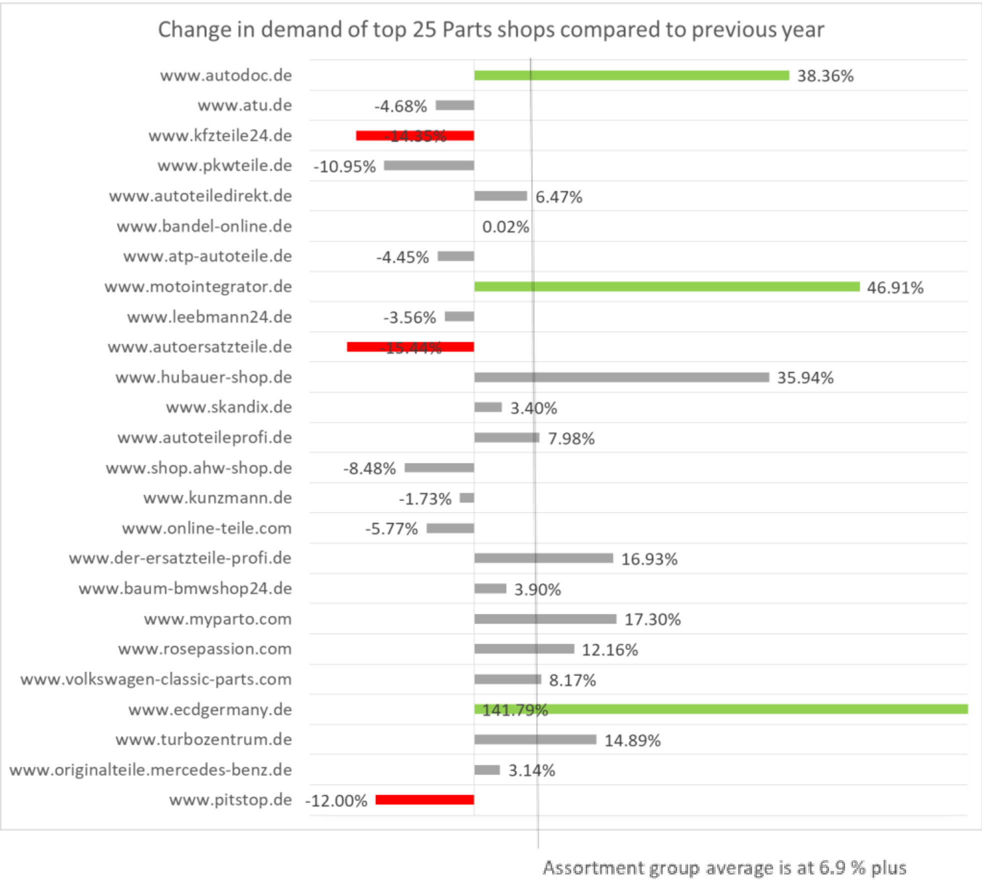
- Spotlight: Car dealership groups in aftersales

As already mentioned in the overall ranking, Autodoc and Motointegrator are also the clear winners in the Parts range in terms of growth (for Ecdgermany, the growth range cannot, however, be clearly identified and may not lie in the Parts range). Also worth mentioning is the growth of the BMW car dealership shop of Hubauer BMW at almost 36% compared to the previous year.

Meanwhile, Kfzteile24, Autoersatzteile and Pitstop are clear losers. After gaining positions in AA-STARS 4, Pitstop once again finds itself at the AA-STARS 3 level.



Explanation on how to read the chart:
The market for the Parts range has performance in the AA-STARS 5 period of + 6.9 %. In this segment a shop therefore performs better than the market if the increase is higher than + 6.9 %.

Online-Shop-Ranking | Segment “Tyres & Rims”

All the top 25 of the past year are also represented in the top 25 now and have only swapped places.

Everything has stayed the same among the top spots.

Ranking index 2022	Change from previous years	Top 25 Automotive-Aftersales-Online-Shops | Tyres & Rims
1	-	www.reifendirekt.de
2	-	www.reifen.com
3	-	www.felgenshop.de
4	+1	www.goodyear.eu
5	-1	www.felgenoutlet.de
6	-	www.reifenleader.de
7	+1	www.rsu.de *1
8	+2	www.vergoelst.de
9	-2	www.oponeo.de
10	-1	www.tirendo.de
11	+1	www.reifentiefpreis.de
12	-1	www.onlineraeder.de
13	+2	www.allereifen365.de
14	+3	www.reifen-pneus-online.de
15	+4	www.werksraeder24.de
16	-	www.reifentiefpreis24.de
17	+4	www.euromaster.de *2
18	+5	www.reifen24.de
19	-5	www.premio.de
20	+4	www.or24.de *3
21	-8	www.quick.de
22	-4	www.wheelscompany.com
23	+2	www.reifen-felgen.de
24	-2	www.giga-reifen.de
25	-5	www.reifen-richtig-billig.de

*1 also includes the non-automotive after-sales segment
*2 formerly www.shop.euromaster.de
*3 formerly www.original-räder.de

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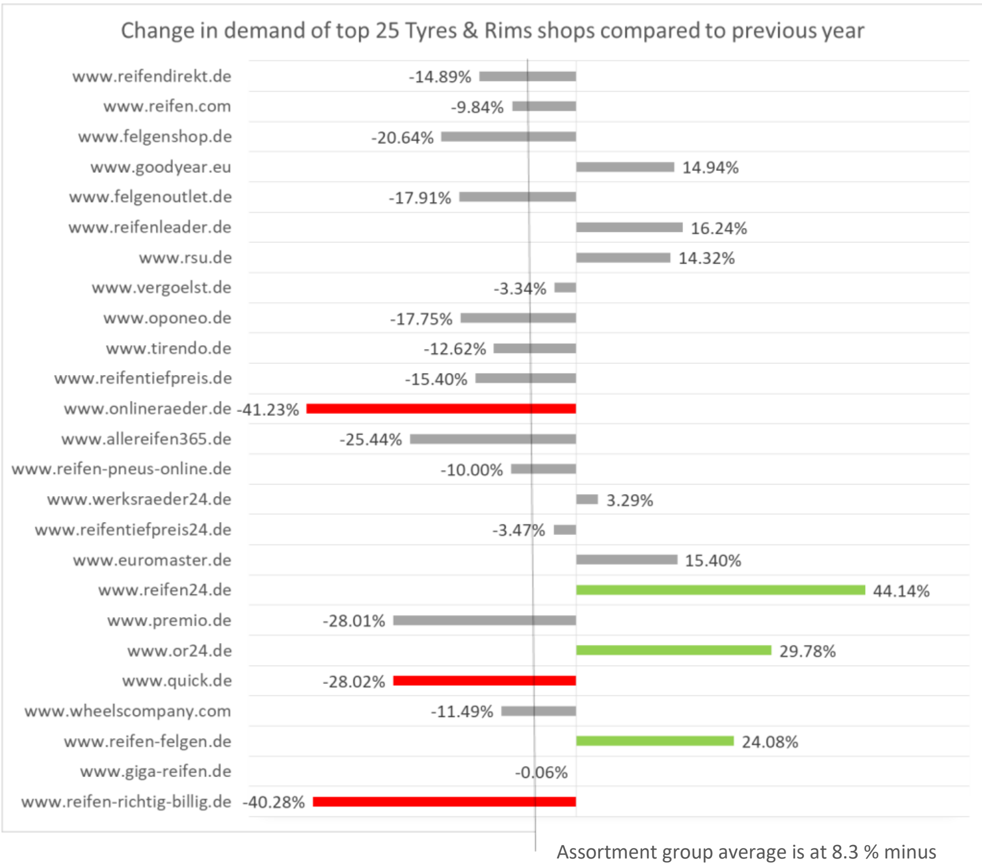
Reifen24.de has gained exactly 5 places and is the winner in terms of relative growth. Both Premio.de and Quick.de (part of the same group) have lost several places. The strong decline in demand at Reifen-richtig-billig.de (part of reifen.com) is also surprising.



Explanation on how to read the chart:
The market for the Tyres & Rims range had performance of -8.3 % in the AA-STARS 5 period. In this segment a shop therefore performs better than the market if the drop is lower than -8.3 %.

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Online shop ranking | Segment "Specialized"

Not all areas in the Specialized segment are experiencing the same level of falling demand.

Tuning is actually among the winners.

In general, it can be seen that specialists in the Number Plate range have plummeted, while tuning shops have managed to record good growth rates. The new additions are due to the expansion of our research to include e-mobility. Some of these are not purely automotive aftersales shops (see also "E-mobility" Spotlight for more).

The shops www.batterie24.de (- 10 places), www.sportauspuff-store.de (- 32 places), www.autoaid.de (- 15 places), www.zulassungsstelle.de (- 35 places), www.kroschke.de (- 46 places), www.lederzentrum.de (- 14 places) and www.onlinefussmatten.de (- 17 places) have fallen out of the top 25 ranking.

Ranking index 2022	Change from previous years	Top 25 Automotive aftersales online shops | Specialized	Sub-range
1	-	www.campingwagner.de	Camping
2	+1	www.mycarly.com	Diagnostics
3	-1	www.kennzeichenking.de	Number plate
4	Newcomer	www.elektroshopwagner.de *1	E-Mobility
5	-1	www.kupplung.de	Accessories
6	+2	www.magnatuning.com	Tuning
7	Newcomer	www.entega.de *1	E-Mobility
8	+5	www.enviam.de *1	E-Mobility
9	-2	www.autobatterienbilliger.de	Batteries
10	-	www.ars24.com	In Car Entertainment & Navigation
11	-	www.mobilityhouse.com	E-Mobility
12	+3	www.racechip.de	Tuning
13	+3	www.chiptuning.com	Tuning
14	-9	www.kennzeichenbox.de	Number plate
15	-1	www.bmw.de *2	Accessories
16	-4	www.kufatec.com	Retrofit
17	+47	www.liontuning-carparts.de	Tuning
18	-9	www.seat-leon.de	Accessories
19	-	www.carparts-expert.com	Accessories

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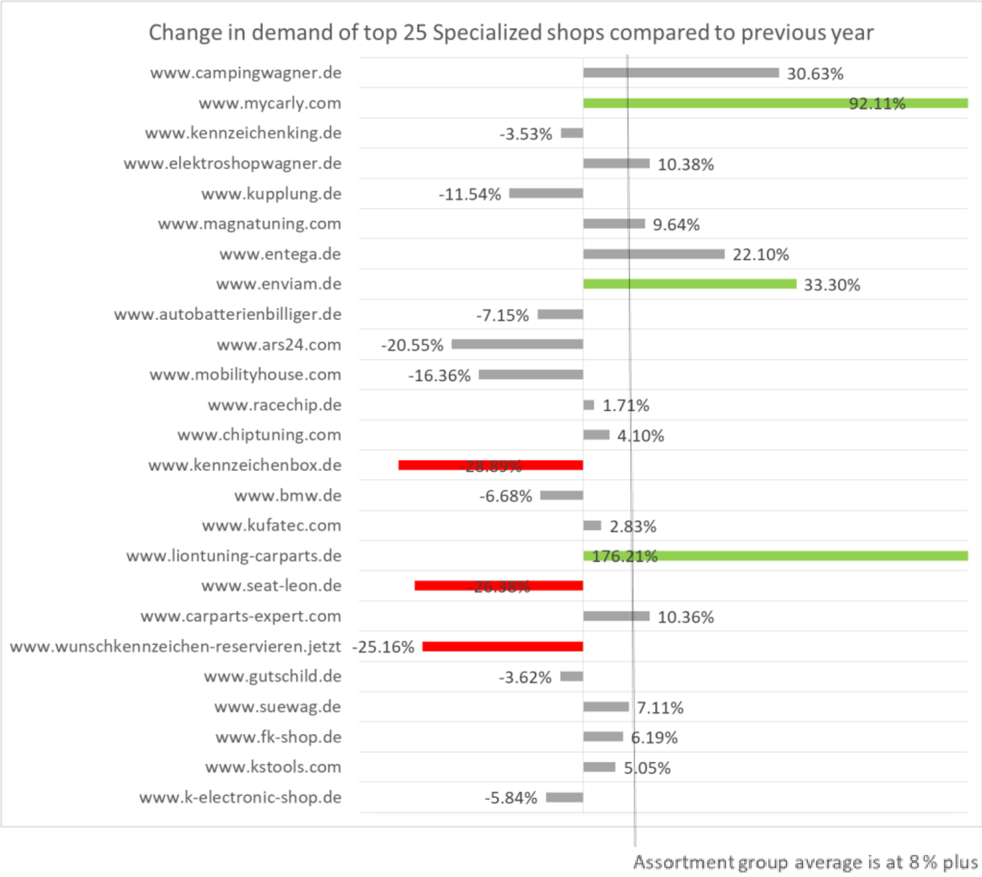
Ranking index 2022	Change from previous years	Top 25 Automotive aftersales online shops | Specialized	Sub-range
20	-14	www.wunschkennzeichen-reservieren.jetzt	Number plate
21	-4	www.gutschild.de	Number plate
22	Newcomer	www.suewag.de *1	E-Mobility
23	+9	www.fk-shop.de	Tuning
24	+2	www.kstools.com	Workshop supplies & tools
25	+5	www.k-electronic-shop.de	Tuning

*1 also includes the non-automotive after-sales segment
*2 formerly www.shop.bmw.de

The shop www.liontuning-carparts.de combines B2B and B2C into one shop and was able to almost triple demand.



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The market for the Specialized range had performance of + 8.0% in the AA-STARS 5 period. In this segment a shop therefore performs better than the market if the increase is higher than + 8.0%.

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- Spotlight: Car dealership groups in aftersales

Spotlight: E-mobility shops

Due to its currency, in the "Specialized" range we analysed the sub-range of e-mobility in the automotive aftersales market, identifying 61 online shops which include a focus on this range. 46 shops made it into the ranking. We present the top 25 e-mobility charging management providers[5] to you below.

Ranking Index 2022	Top 25 Automotive aftersales online shops | E-mobility	URL classification
1	www.elektroshopwagner.de	Home Appliances Shop with category Wallbox & Accessories
2	www.entega.de	Energy provider with Wallbox Shop
3	www.enviam.de	Energy provider with Wallbox Shop
4	www.mobilityhouse.com	Neutral provider for charging solutions with shop
5	www.suewag.de	Energy provider with Wallbox Shop
6	www.elli.eco	Provider for charging solutions with shop (Volkswagen Group)
7	www.memodo.de	Photovoltaic Wholesale & Online Shop for Energy Solutions / Charging Stations
8	www.vattenfall.tink.de	Energy provider with Wallbox Shop
9	www.allego.de	Retail sale of electrical household appliances with category e-mobility charging technology
10	www.energiespeicher-online.shop	Manufacturer-independent supplier of photovoltaic modules, inverters, electricity storage systems, charging stations, etc.
11	www.cablesoolutions.shop	Charging infrastructure solutions for electric cars
12	www.e-mobileo.de	Charging solutions for electric vehicles
13	www.evmotions.de	Charging infrastructure solutions for electric cars from Hungary
14	www.juice-store.com	Manufacturer of charging stations and software from Switzerland

[5] According to website visibility (for energy providers this is not the shop visibility)

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Ranking Index 2022	Top 25 Automotive-Aftersales online shops | E-mobility	URL classification
15	www.ewe-go.de	Charging and mobility solution provider
16	www.nic-e.shop	Online sales brand for e-mobility charging solutions, storage solutions and electromobile accessories from Austria.
17	www.shop-muenchner-solarmarkt.de	Wholesale PV
18	www.esl-emobility.com	Service provider for electromobility with E Mobility Shop
19	www.wallboxcenter.de	Service provider for electric vehicle charging stations with online shop
20	www.enercab.at	Online provider for energy and charging solutions from Austria
21	www.store-charge.com	Online provider for energy and charging solutions
22	www.wallbox24.de	Wholesale electrical products with B2C online shop for charging solutions
23	www.nrgkick.com	Manufacturer in the field of charging technology for electric cars from Austria
24	www.shop4ev.com	Accessories shop for electric cars
25	www.ladehero.de	Online provider for energy and charging solutions

Demand for e-car charging management solutions rose by 23% (compared to the previous year).

We identified shops that offer wall boxes or charging cables in their range. The above ranking shows which websites have shopping options. The ranking criterion is the website's visitor frequency. Demand rose by 23% compared to the same period of the previous year.

The area of charging solutions is currently developing dynamically in the market. We carried out our research in August 2022.

Spotlight: Car dealership groups

In this Spotlight we want to examine the digital positioning of one of the key sales groups for the automotive aftersales market. We looked at the vehicle manufacturer-independent top 100 car dealership groups and manufacturer-owned car dealerships.

The number of car dealerships in Germany varies depending on the counting method.

Currently, Germany has around 9,000 sales locations, with sales averaging 342 new vehicles per year and sales location.[6] If we include the branded businesses and service stations, there are around 14,460 businesses[7].

There are therefore between 9,000 and 14,500 car dealerships in Germany, including service stations. The number of car dealerships has been slowly but steadily declining for years (around 17 % fewer than 12 years ago). The consolidation in favour of the major car dealership groups is forging ahead.

Is the online shop world controlled by the brands (automotive manufacturers) themselves?

Goodbye online.
Hello offline.

The automotive brands reveal an inconsistent picture regarding aftersales in direct sales. However, most follow the trend of not offering any direct sales online or converting them into car dealership routing. The car dealerships themselves are also inconsistent in pursuing Omni channel concepts. The following table shows which direct purchasing options brands offer digital customers.

We investigated the B2C online shop activities of 34 brands. We wanted to know which brands offer consumers the chance to purchase a spare part, a complete wheel or an accessory item directly online and have those delivered. There must be a direct purchasing option including payment to meet our definition of a shop. Secondly, we wanted to know whether forced routing to a car dealership took place when an attempt was made to make a purchase.

[6] According to the sector analysts at ICDP
[7] According ZDK (2021)

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- **Spotlight: Car dealership groups in aftersales**

Two-thirds of automakers do not offer digital customers the option to buy accessories or spare parts online.

Only 32% of vehicle brands provide a B2C online shop.

Vehicle brand	B2C online shop *1	Routing mandatory
Alfa Romeo	no	no
Audi	no	yes
BMW	**yes**	yes
Citroen	**yes**	yes
Dacia	no	yes
DS Automobiles	**yes**	yes
Fiat	no	yes
Ford	**yes**	no
Honda	no	yes
Hyundai	no	yes
Jaguar	no	yes
Jeep	**yes**	no
Kia	no	yes
Landrover	no	yes
Lexus	no	yes
Mazda	no	yes
Mercedes	**yes**	no
Mini	no	yes
Mitsubishi	no	yes
Nissan	no	yes
Opel	no	yes
Peugeot	**yes**	no
Porsche	**yes**	no
Renault	no	yes
Seat	no	yes
Skoda	**yes**	no
Smart	no	yes
SsangYong	no	no
Subaru	no	yes
Suzuki	no	yes
Tesla	**yes**	no
Toyota	**yes**	yes
Volkswagen	no	yes
Volvocars	no	yes

*1 without taking classic car parts shops into account

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- Spotlight: E-mobility shops
- **Spotlight: Car dealership groups in aftersales**

The result: Only 11 out of 34 brands provide at least a B2C online shop in the area of spare parts or accessories, where a private customer can actually make a direct purchase. 24 brands only offer a direct or indirect contact option with a nearby car dealership. Only one brand does not even offer this.

A few things stood out here, which we would like to examine for a moment.

Stellantis has now implemented various accessory shops for almost all brands through its own company Mister Auto. It was confusing that the Mopar-Store (also run by Mister Auto) did not offer any guest checkout and that according to its own statements the store is actually intended for B2B customers although, for example, the Jeep page linking to the shop is directed at consumers. There is a lack of an eye for detail regarding usability here, giving the buyer a feeling of uncertainty. A good conversion rate cannot be achieved in this way.

Ford does not even attempt to run its own shop, but has instead opened an Ebay store.

The shops and shop integration at Alfa Romeo and Mini feature technical errors. Recurring errors appear over a longer period of time, for example if the visitor wants to add items to their basket. As this forces the sales process to be aborted, we have evaluated these shops as “not a shop”.

The majority of automakers force the buyer to contact the car dealership.

BMW has now integrated all shops dedicated to various themes into the Bmw.de site and provided a clear overview of them. It is possible to make a purchase, but only via a car dealer store. This is currently the best omnichannel solution integrating the car dealerships that we have seen.

At Mercedes, online shopping options can only be found with difficulty and are often well hidden in the brand sites. Only very determined customers will find the shopping option. We consider this a step backward in the omnichannel business. Visitors are forced to contact the car dealership. Goodbye online. Hello offline.

Car dealerships have opportunities and potential for action in the omnichannel business.

Manufacturers could offer better central omnichannel solutions, otherwise it is up to the car dealerships themselves to implement adequate omnichannel options for digital customers. Ideally, using their own online shop, but also through marketplace activities.

And here’s one final tip (primarily for premium brands). Convenience often trumps price. You do not have to be the cheapest to be successful. But to make sales it must be as easy as possible to find you.

Results – Top 25 rankings

- Overall shop ranking: summary of the segments P/T/S in an overall ranking
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Ebay shop activities of car dealerships

51% of the top car dealership groups run one or more Ebay shops

It is interesting to look at the car dealership activities in the Ebay marketplace. Of the top 100 car dealership groups[8], 51 % are represented with at least one Ebay shop. However, the strategies behind them vary greatly and range from an additional channel (addressing the customer at all touchpoints) through increasing sales in aftersales to occasionally selling off remaining stocks. In some cases, purchasing by car dealerships for repair shop requirements also takes place at Ebay. Overall, we were able to identify more than 400 Ebay shops[9] that are run by branded car dealerships. Of these, the top 100 car dealership groups run 73 Ebay shops. The top 25 ranking of the top 100 car dealership groups (including manufacturer direct sales) according to Ebay shop sales and range offered. We have also included Ebay shops from manufacturer-specific Ebay shops and have shown these in bold italics.

Ranking	Top 25 car dealership groups by Ebay shops turnover	Assortment "Parts" offers	Assortment "Tyres & Rims" offers	Assortment "Accessories/ Specialized" offers
1	Autohaus Wolfsburg Hotz und Heitmann	yes	yes	yes
2	Alphartis SE (ehem. AHG-Gruppe)	yes	yes	yes
3	***BMW AG (Niederlassungen)***	yes	yes	yes
4	Dello-Dürkop·Hansa-Gruppe	yes	yes	yes
5	Krah + Enders Gruppe	yes	no	yes
6	Glinicke-Automobilhandelsgruppe	yes	no	yes
7	Procar-Automobile·Gruppe	yes	yes	yes
8	Voets·Gruppe	yes	no	yes
9	Tiemeyer	no	yes	no
10	***Ford-Werke GmbH Kundenzentrum***	yes	yes	yes
11	Gottfried Schulz	yes	yes	yes
12	Kunzmann	no	yes	yes
13	Heermann & Rhein Gruppe	no	no	yes
14	Torpedo-Gruppe	yes	yes	yes
15	Kaltenbach-Gruppe	no	yes	yes

[8] https://top100.dat.de/dat-top100-hitliste/
[9] No claim to completeness

Results – Top 25 rankings

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Ranking	Top 25 Car dealership groups by Ebay shops turnover	Assortment "Parts" offers	Assortment "Tyres & Rims" offers	Assortment "Accessories/ Specialized" offers
16	AVP Autoland	yes	no	yes
17	Hülpert Automobile	no	no	yes
18	Kohl-Gruppe	yes	yes	yes
19	Brass-Gruppe	no	yes	yes
20	Autohaus Peter Gruppe	yes	no	yes
21	Autohaus Schade	yes	yes	yes
22	***MB GTC GmbH Mercedes-Benz Gebrauchtteile Center***	yes	no	no
23	Hahn-Gruppe	no	no	yes
24	***VGRD Volkswagen Group Retail Deutschland***	no	yes	yes
25	Ernst + König	yes	yes	yes

Should customer loyalty be forced?

Omnichannel trading offers car dealerships the chance to reach digital customers.

The Institute for the Automotive Industry writes about the new digital study: "The contact moments crucial for sales and loyalty, by contrast, have to be populated with personal contact forms – if the individual customer also wants to take advantage of this offer.[10]" It seems that manufacturers are ignoring the postscript and do not wish to offer the digital customer this path. And it is exactly here that we see an opportunity for car dealership groups.

Car dealerships are increasingly positioning themselves among the top shops with spare parts and accessories.

While many manufacturers have evolved their own online shops in the aftersales business into sites purely dedicated to routing customers to the dealership and have generated new breaks in the customer journey in the process, customers are deprived of the chance to quickly and easily buy original accessories online instantly, without visiting the car dealership. At least 6 car dealerships can be found among the top 25 parts online shops.

We consider this a chance for car dealerships to establish separate omnichannel solutions to let the customer decide where, when and how they want to shop.

[10] Digital study 2022: https://www.ifa-info.de/forschungsberichte

Background information on the study

- **The objective**
- The market structure
- Research of online shops and marketplaces
- Calculation of the ranking

The objective

Unlike other studies, Speed4Trade takes a closer look at the actual size of the online shop market in the automotive after-market. From the perspective of its target: the buyer!

We believe that the best way to do this is to view the market from an online shopper's point of view and not from the corporate perspective. It follows, therefore, that visibility on the net is a key driver of online success. We used Google, marketplaces, price comparison sites and other freely accessible sources to identify the shops. Basically any resource where a shop might be visible to a buyer.

The benefit of our survey method: Previous studies have left a gap between real market data and reported study data. We dispense with an analysis of company indicators[11] and interviews – with all their limitations – and concentrate instead on what the online customer actually sees. A bottom-up approach so to speak.

[11] In this current survey of our study, by way of an exception we used the TOP 100 list of car dealership groups, which is based on company indicators.

The market structure

It makes sense to divide the automotive after-market into three primary range segments in order to analyse online business: Parts, Tyres & Rims and Specialized.

These segments can also be broken down according to vehicle types. This study exclusively investigates **passenger cars** (**including light vehicles**).

Parts
We have assigned to this segment shops which, among other things, allow users to select a vehicle and search for a suitable spare part. This also applies to full-range providers. Shops are not assigned to multiple segments. Please note that the assignment is carried out based on the visual presentation to customers as well.

Tyres & Rims
This segment primarily includes tyres, rims, complete wheels and relevant accessories. Tyres & Rims have featured since the second edition of AA-STARS.

Specialized
This range is also described as “Other”. It includes all areas that could also count as accessories. They are items that, unlike car parts and rims, often do not need an exact match with a vehicle. Among others, the Specialized/Other range includes shops specialized in:

- Vehicle accessories, including car hi-fi, **e-mobility**, number plates and others
- Oils, lubricants and consumables, care products, lacquers
- Tuning
- Vehicle accessories from automakers
- Repair shop accessories and others

Background information on the study

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Research of the online shops

The online shop research

The research is performed according to the following procedure:

- Identification of sector-relevant shops with classification
- Inclusion in the index
- Inclusion in the ranking

1,768 online shops that satisfy the following criteria were included in the index:

- B2C shop, active and functional
- Automotive after-sales range (segment P, T or S)
- After-sales range for passenger cars/light vehicles
- at least 20 % of the buyers from Germany

7.4% of online shops closed during the past year.

In the AA-STARS observation period, 141 online shops dropped out of the index due to inactivity, a share of approx. 7.4 % (6.4 % in the previous year).

Segment	Inclusion in the index (number of shops)	Inclusion in ranking (shop count)
Parts	527	351
Tyres & Rims	186	127
Specialized	1,055	787
TOTAL	**1,768**	**1,265**

Almost 30% of the online shops identified have an annual turnover of less than €50K.

The shop's total assortment range is always taken into account to calculate its revenue relevant for the ranking. The range is not broken down. Only shops with more than €50K sales per year are included in the ranking.

Calculation of the ranking

Speed4Trade has developed several algorithms to calculate the gross merchandizing volume (GMV).

The Speed4Trade algorithms were used to calculate the revenues generated by the individual online shops as a best possible approximation. In places, the algorithms use different average values for the automotive after-market, which are based on real-time analyses.

Regression analyses are used to minimise errors. The use of averages means that the revenues for each individual shop may deviate upwards or downwards, but they do permit an accurate appraisal of the overall market size.

Trading volume for Germany
AA-STARS collects current figures for trading volumes in Germany. This delimitation by country does not always yield clear results for B2C trade, as country borders become blurred. All shops consistently have a percentage of sales from a country other than Germany. It is rare for B2C shops to deliver only in Germany. It is also unusual in B2C trade to accept only buyers with a registered, delivery or billing address in Germany. The index does not include any shops with less than 20% buyers in Germany. Revenues generated by shops with >= 20% buyers in Germany were considered in full, so including purchases from abroad.

Kindly take note, that only the individual online shops and not the company's figures are included and presented, depending on the ranking. Companies tend to use a large number of channels (multi- or omnichannel) for their online trading activities and frequently have several online shops and occasionally even apps. There is often an online B2B segment as well, although it will have little external visibility.

It follows, therefore, that the top-ranking online shop will not always belong to the most successful company on the market. There are companies with several shops in the Top 25.

Shops that generate less than k€50 GMV per year are included in the index but disregarded in the individual rankings.

What do you need? Our promise!

- Which data do oyu need to make better decisions?
- Which tasks do you want to complete using the data?
- How do you identifiy the benefit?
- Our offer: Proceed as a team

What do you need? Our promise!

The AA-STARS index focuses on a small section of the automotive after-market [12] – primarily B2C online shops in Germany stocking a range of spare parts, wheels and accessories for passenger cars.

There are many other areas of the market and issues that we have not addressed in this study paper or which we do not even know.

Feel free to enquire about other market information that you require. We will do our best to provide you with targeted and meaningful analyses. Our concern at all times is to identify the issues that really matter to you. We would like to interview you to find out which problems you can solve with other analyses in your professional field and which specific benefits and values this would deliver for you.

Yes, let's talk!

Click on the button to send us a request to discuss your data requirements – with no further commitment. Thanks for your interest!

[1] We usually only show you a small section (e.g. the top 25) in our AA-STARS study paper. Please contact us if you would like to have access to more data.

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About Speed4Trade

Closer to the customer through digital solutions – by Speed4Trade.

Speed4Trade GmbH develops software for digital trading. The e-commerce software house is a specialist for setting up digital platforms such as online shops, marketplaces or service portals and connecting them to the current IT systems. Focusing on the automotive after-market, Speed4Trade helps manufacturers and traders from all sectors to create digital business models with automated processes. True to the vision of "Reducing the distance to customers through digital solutions", Speed4Trade gives B2B and B2C providers direct access to more customers – in a secure, reliable and efficient setting. To do this, the company builds on its proprietary and scalable software products and establishes highly performant interfaces. The experienced software architects support customers through all phases of a project, from the initial brainchild to successful completion. An international player, the company is located in Altenstadt a. d. Waldnaab in Bavaria and has 100 employees.

www.speed4trade.com

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Imprint

Speed4Trade GmbH
An den Gärten 8 – 10
92665 Altenstadt

Germany

Contact:

Torsten Bukau
Head of Data Management & Analytics
analytics@speed4trade.com