

How to make better decisions – with Speed4Trade Analytics.

AA-STARS | Issue 6

Study paper
Automotive Aftersales Shop Index

January 2024



www.speed4trade.com

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Summary

- **Market research:** 20,000+ URLs | 9,000 B2C online shops
- **Market segment:** Automotive aftermarket B2C | Passenger cars | Europe
- **Market dynamics:** Annual survey and update
- **Market data:** Objective algorithm | Research from the buyer's perspective

AA-STARS – Benchmark with market dynamics

Successful online traders don't depend on outstanding digital trade solutions alone. They must also be familiar with and observe the market and competition in order to identify suitable courses of action. What matters in our view is to make better decisions on the basis of reliable information.

Speed4Trade established the AA-STARS automotive aftersales shop index as a benchmark more than 5 years ago to meet this requirement. We would like to present the study paper to you in this sixth issue. The study paper provides insight into the most frequently visited B2C online shops as initial guidance.

AA-STARS 6:
22 country dossiers,
220 top 10 shops,
€2.3 billion GMV.

Our sixth issue also includes some new features:

- **Updated:** Trends in German online shop markets from September 2022 to August 2023 in a year-over-year comparison
- **NEW:** A top 10 ranking of online shops in the 'Parts' segment for an additional 21 European countries

Autodoc SE shops hold a
37.5% market share of all
220 top 10 shops in
Europe.

Speed4Trade is always mentioned as a relevant contact for the automotive aftermarket and digital trade solutions for B2C and B2B. Our knowledge of the market is as much in demand as the long-standing technical expertise we have acquired from a wide range of projects. This makes us a valuable business partner for all market players in the automotive aftersales sector (OEM/IAM parts manufacturers, parts wholesalers, car dealers, repair shops, pure online traders or associations).



Head of Data Management & Analytics
Speed4Trade GmbH

Reasons for the study

Motivation

Markets are changing. Influential factors from outside the companies come in many shapes and forms. The last 12 months were shaped by political and environmental factors, along with a dizzying rise in inflation.

The effects of these factors can be seen very clearly in the changed demand in B2C shops. There is no other market study that takes such a detailed look at the B2C online automotive aftermarket in Germany as this one by Speed4Trade.

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.

In total, we identified more than 20,000 URLs from the automotive aftermarket segment and classified almost half of them as relevant B2C transaction¹ pages.

An additional classification was performed for 3,600 B2C shops in Germany, 3,950 B2C shops in Europe and 1,280 marketplaces. We enriched our data for our studies and spotlights in previous issues with further attributes (traffic, product range and TecDoc use etc.) to gain relevant insights into the market.

The purpose of this study paper is to offer our customers and interested parties an excerpt from the findings.

AA-STARS 6

Classification of over
20,000 automotive
websites (URLs) in
Europe

Providers on the automotive aftermarket can draw the following **benefits** from this study paper: They receive information about competitors in B2C online trade for more than 20 countries in Europe. 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 Websites that enable purchases in the B2C segment, including online payment

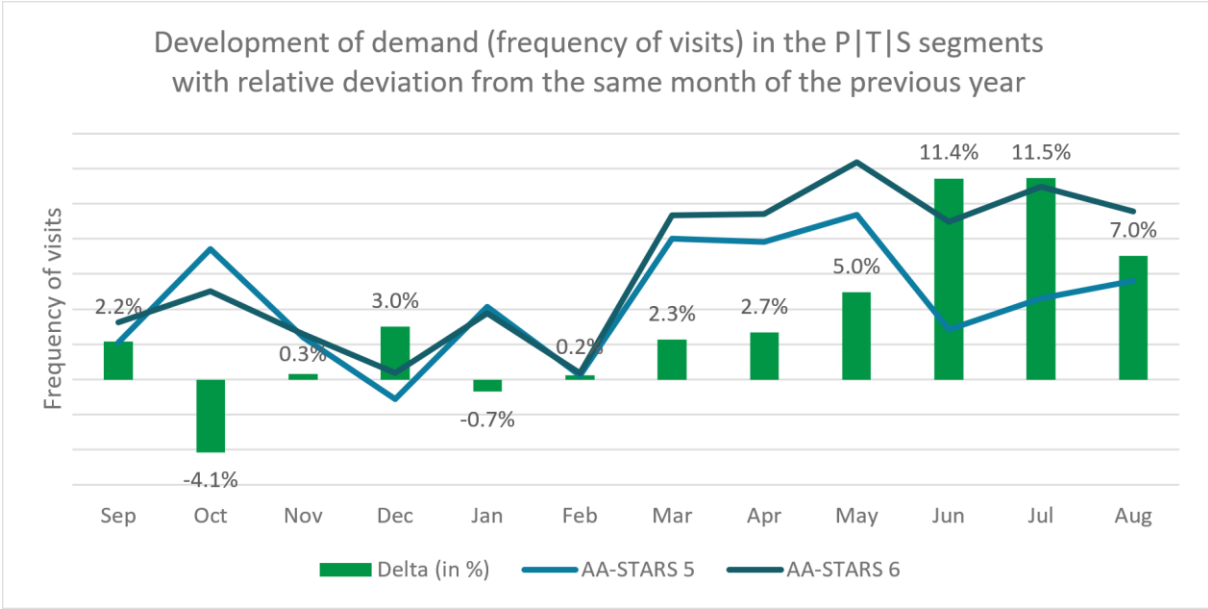
Year-over-year comparison – Germany

Parts | Tyres & Rims | Specialized segments

AA-STARS 6 – German market trends

The AA-STARS study looks at the 12 months from September of one year to August of the following year - in this issue 6 from September 2022 to August 2023.

We compare the data of the B2C online shops in the ranking² with the data from the previous year, in order to draw conclusions on the performance of the market. For the purpose of our study, performance is defined to mean demand trends based on the frequency of visits, which permits evaluation without dependence on the supply situation. In this regard, the shop conversion rate on the market should be viewed as stable.



While the first half of last year returned a positive result and the second half a negative one – which was due in part to the war in Ukraine – the situation was reversed in the second half of this reporting period. **Overall, demand experienced a slightly positive development at + 3.4% (+ 5.1% last year).** The development of demand in B2C shops can be interpreted as an inflation-adjusted reflection of market trends.

AA-STARS 6 shows:
Demand rose by 3.4%
year-over-year.

In the Parts segment, demand in the top 10 shops remained stable at + 0.17% compared to the previous year. This means that the top 10 parts shops surrendered market share.

² Only shops with at least €50K in annual revenue are included in the ranking

The GfK Consumer Confidence Index³ experienced a very positively development from its nadir in October 2022 (- 42.8) to June 2023, but remained at a low level of - 24.4 and since September has again dropped slightly to - 28.1 (November 2023). It is therefore reasonable to state that the B2C environment for online retail in the automotive aftermarket remains difficult.

The B2C automotive aftersales market correlates strongly with the development of the consumer goods index.

Are there differences in the market trends for the P|T|S product groups?

While the performance of the Tyres & Rims segment was far lower last year compared to the Parts segment, they have been far more aligned this time round, at least over the course of the year. Recent years have already shown that the B2C online tyre market is more volatile than the online after- or accessories markets. The improved performance of the Specialized segment – which primarily features accessories, tuning and maintenance – is surprising.

At 5.8%, the Specialized/Accessories segment experienced the most significant rise in demand.

Demand in the P|T|S segments remained unchanged year-over-year (0%) in the first half of the reporting period. This was followed by a year-over-year increase of 6.5% in the second half. This resulted in an overall rise in demand of 3.4% compared to the previous year.

Portfolio group	1 st half-year	2 nd half-year	Total
Parts	-3.8%	+6.4%	+1.4%
Tyres & Rims	-9.6%	+13.9%	+1.3%
Specialized (Accessories)	+7.1%	+4.7%	+5.8%
Σ P, T and S	0%	+6.5%	+3.4%

Percentage change from the previous year (comparison AA-STARS 5 to AA-STARS 6)

³ <https://de.statista.com/statistik/daten/studie/2425/umfrage/gfk-konsumklima-index/>

Results – Overall European ranking | Parts segment

Overall ranking of the top 10 shops in Europe

for the 22 selected countries, including Germany

Number of registered cars in 2021: 290.3 million

Parts product segment:

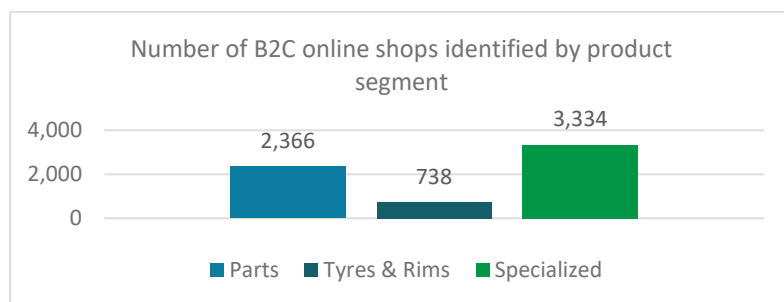
GMV⁴ top 10 shops Europe: €0.9 billion

GMV 220 country top 10 shops: €2.3 billion

KPI⁵: GMV/registered cars: €8.04

Number⁶ of identified parts shops: n = 2,366 of 6,438

22 countries | 220 shops
GMV = €2.3 billion



Autodoc SE accounts for 5 of our European top 10 and is therefore the market leader in Europe.

Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.halfords.com	Halfords Limited
2	www.eurocarparts.com	LKQ / Euro Car Parts Limited
3	www.oscaro.com	PHE Group / société OSCARO
4	www.norauto.fr	Mobivia / société Norauto France
5	www.autodoc.de	Autodoc SE
6	www.auto-doc.fr	Autodoc SE
7	www.autodoc.co.uk	Autodoc SE
8	www.partsouq.com	PS AUTO GOODS WHOLESALERS L.L.C, VAE
9	www.autodoc.es	Autodoc SE
10	www.auto-doc.it	Autodoc SE

Autodoc SE share of the traffic for the European Top 10: 35.5%

⁴ Top 10 of the 220 European shops; gross merchandizing volume (GMV) in €; estimate produced by the Speed4Trade algorithm

⁵ Refer to page 9 for explanations of the KPI

⁶ 'n' is the number of parts shops, excluding used parts shops | 'of' is the total number of all AA-STARS shops (P, T, S) identified in the country, including used parts shops

Other companies in the ranking include www.mister-auto.com (Stellantis) in 12th place, www.feuvert.fr (FEU VERT SAS) in 13th place, www.kfzteile24.de (kfzteile24 GmbH) in 14th place, www.intercars.pl (Inter Cars SA) in 24th place, www.atp-autoteile.de (SAG) in 25th place, and www.winparts.nl (Winparts BV) in 29th place.

Group ranking according to sales

Autodoc's sizeable share of 35.5% of traffic at the top 10 European shops and even 37.5% at all 220 top 10 shops in the individual countries is remarkable. Autodoc SE is Europe's clear market leader with 48 shops among the top 100 European shops (for all countries) and 92 shops in the 220 top 10 shops in the individual countries.

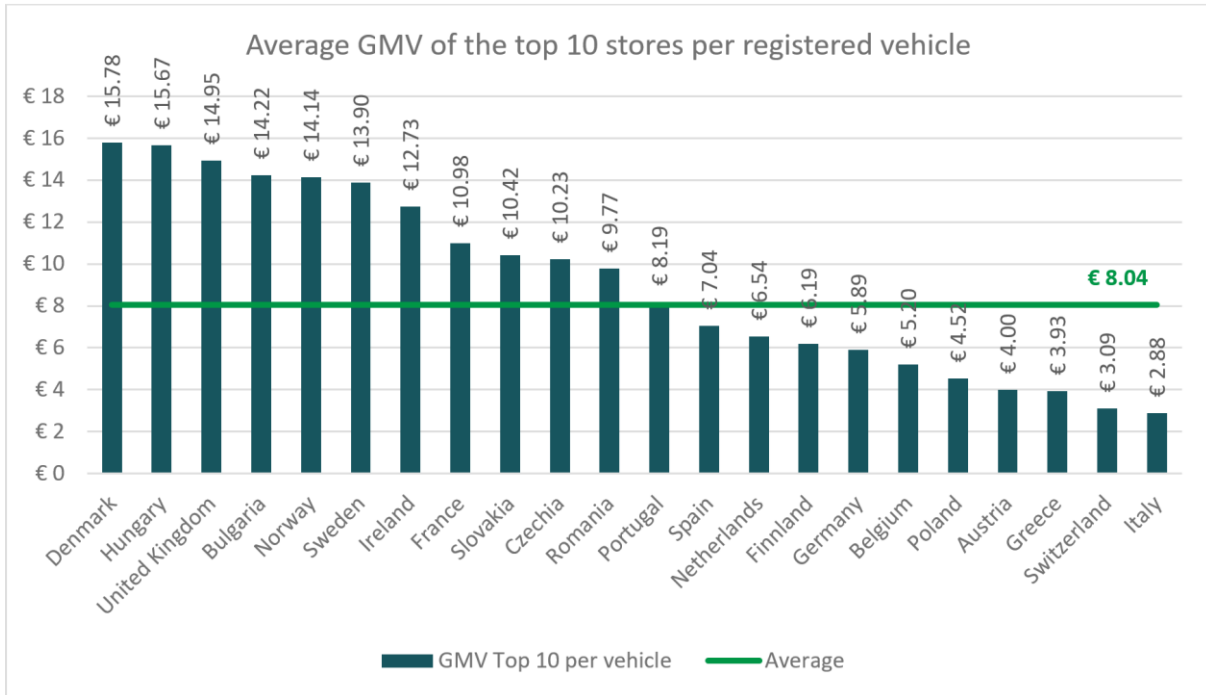
Ranking Index 2023	Number of shops in the European top 100	Corporate groups	GMV in € million
1	48	Autodoc SE	796
2	1	Halfords	204
3	6	Mobivia	187
4	5	LKQ	186
5	2	PHE Group/ Oscaro	140
6	1	PS AUTO GOODS WHOLESALERS L.L.C, VAE	61
7	2	Feu Vert	50
8	2	Stellantis	46
9	2	Inter Cars SA	43
10	1	Kfzteile24 GmbH	38

Please note that not all of the online shops in the groups have been included in this ranking. Autodoc SE, for example, runs over 250 shops in Europe. The ranking only includes shops that are in the top 100 European ranking.

Market maturity for B2C online shopping by country

It is also interesting to consider the market share held by the top 10 shops in B2C automotive aftersales retail in the individual countries. To do so, we have added 'GMV per registered car' to the KPI. This metric can be helpful to acquire quick insight into the 'maturity' of an online market for B2C automotive aftersales in the individual countries, although the factors influencing this KPI are highly diverse. At €5.89 per registered car, Germany tends to rank in the lower third in Europe.

The average GMV per registered vehicle currently ranges at €8.04. The benchmark is €15.78.



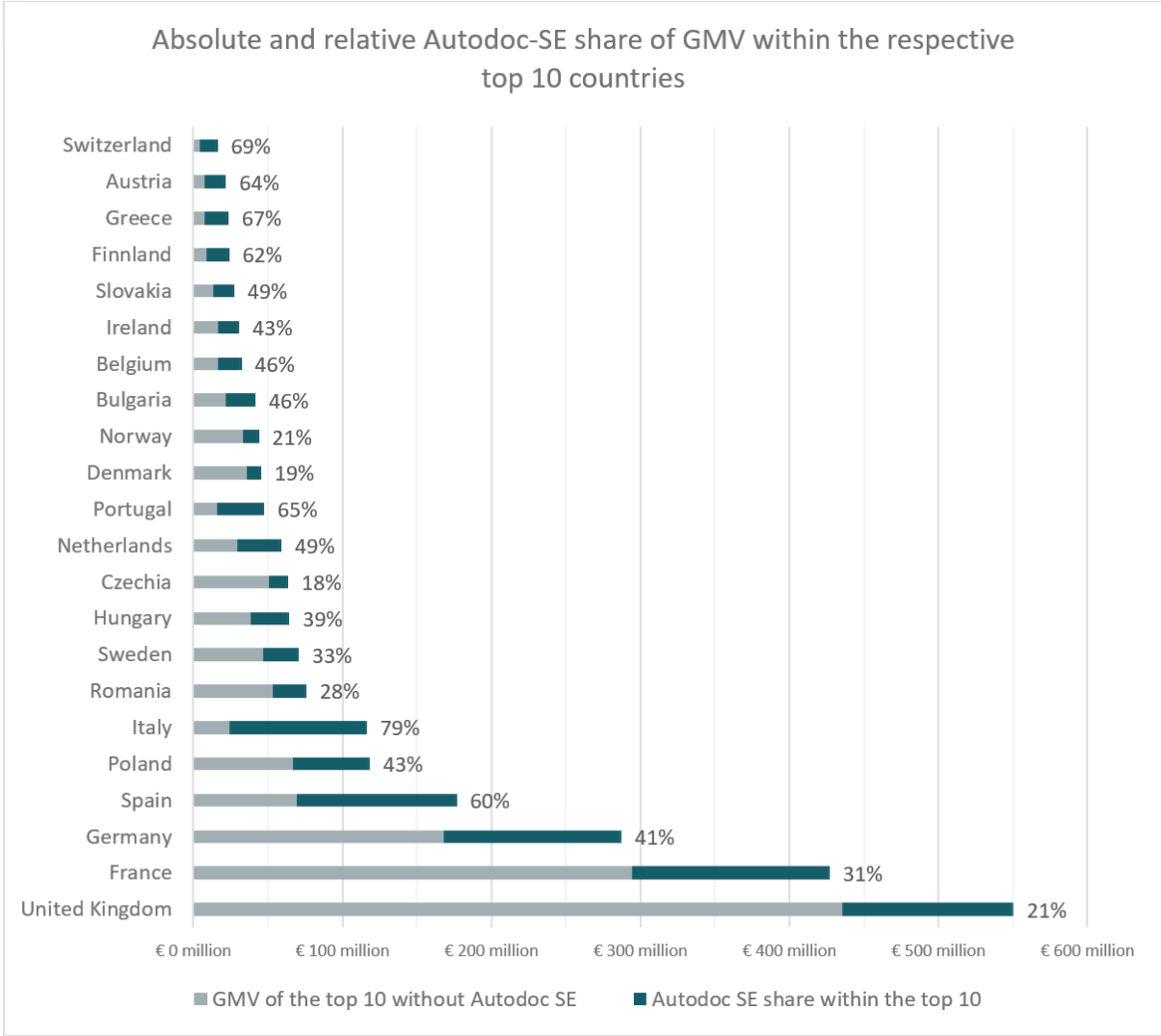
KPI: GMV/registered car

On average, the top 10 parts shops in the 22 countries alone generated around €8 in revenue per registered vehicle each year.

The top 10 shops in Denmark and Hungary generate the highest GMV per vehicle, while Switzerland and Italy reported the lowest.

The strength of Autodoc SE in the top 10 of the individual countries

Autodoc SE has reached its goal of becoming the European market leader. But its performance differs in some countries. It will be interesting to observe in the years ahead whether Autodoc SE will be able to retain or even expand its current position. For example, Autodoc SE was unable to build on its standing in the top 10 for Germany during the reporting period and lost market share.



Autodoc SE holds the largest market share among the top 10 in Switzerland and Italy, and the smallest in the Czech Republic and Denmark.

Results – Country dossiers with the top 10 rankings | Parts segment

Germany (DE)

Number of registered cars in 2021: 48.5 million

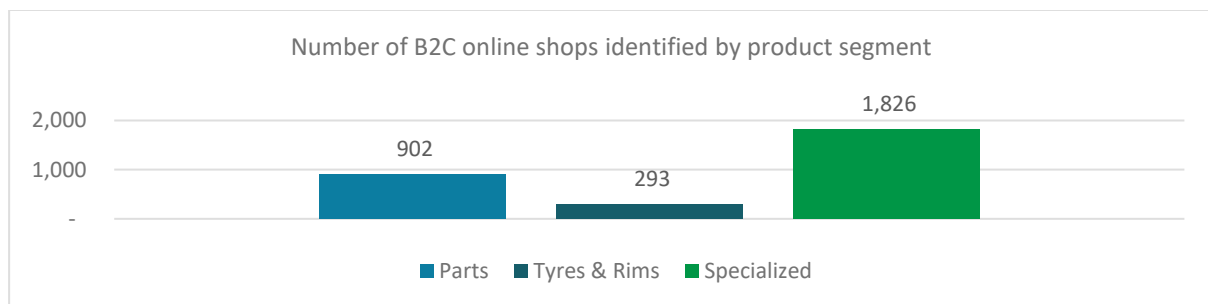
Parts product segment:

GMV⁷ of the top 10 B2C shops: €285.8 million

KPI⁸: GMV/registered car €5.89

Number⁹ of identified shops: n = 902 of 3,021

The top 10 shops alone generated a GMV of €286 million.



Ranking Index 2023	Top automotive aftersales online shops (URL) – Parts segment	Company
1	www.autodoc.de	Autodoc SE
2	www.atu.de	Mobivia / A.T.U Auto-Teile-Unger GmbH & Co. KG
3	www.kfzteile24.de	kfzteile24 GmbH
4	www.bandel-online.de	BANDEL AUTOMOBILTECHNIK GmbH
5	www.atp-autoteile.de	SAG / ATP Autoteile GmbH
6	www.pkwteile.de	Autodoc SE / Partex Global GmbH
7	www.autoteiledirekt.de	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.motointegrator.de	Intercars / CLEVERLOG-AUTOTEILE GmbH
9	www.leebmann24.de	Auto-Leebmann GmbH
10	www.hubauer-shop.de	Hubauer GmbH

Autodoc SE share of the traffic: 41% (46% in the previous year)

⁷ Gross merchandizing volume (GMV) in €; estimate by the Speed4Trade algorithm

⁸ Theoretical sales generated by the top 10 per registered vehicle

⁹ 'n' is the number of parts shops, excluding used parts shops | 'of' is the total number of all AA-STARS shops (P, T, S) identified in the country, including used parts shops

Germany (DE) – year-over-year comparison

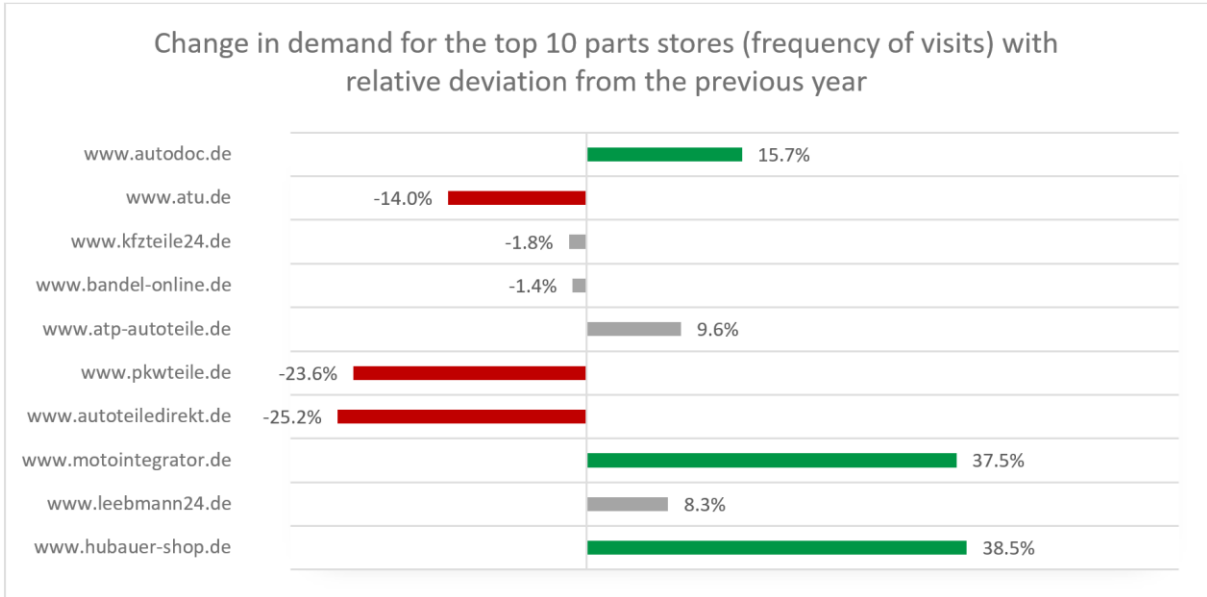
A comparison with the previous year in the metric of traffic (demand) shows that Bandel and ATP managed to move up two places compared with the two Autodoc shops following behind. They therefore swapped rankings with the Autodoc shops www.pkwteile.de and www.autoteiledirekt.de. This is due to a decline in demand in these two Autodoc shops. Overall, the Autodoc SE shops in Germany (12 shops) experienced a 3% drop in demand. This means that Autodoc SE has been unable to continue its growth trajectory via B2C online shops in Germany.

The 12 Autodoc shops in Germany lost 3% in traffic compared to the previous year.

Motointegrator from Inter Cars (which reported strong growth last year) and the BMW shop from Hubauer also managed to make up a lot of ground. In doing so, the Hubauer shop relegated the Autodoc SE shop www.autoersatzteile.de to 11th place.

At 0.2%, demand in the top 10 grew only slightly and therefore more slowly than the market as a whole (1.4%).

Despite a slump in demand, ATU was able to maintain second place due to its comfortable lead over third place. The change in demand is most likely due to the cyberattack.¹⁰



¹⁰<https://www.atu.de/pages/unternehmen/presse/pressemitteilungen/2023/2023-05-19-pm-it-angriff.html>

Results – Country dossiers with the top 10 rankings | Parts segment

Italy (IT)

Number of registered cars in 2021: 39.8 million

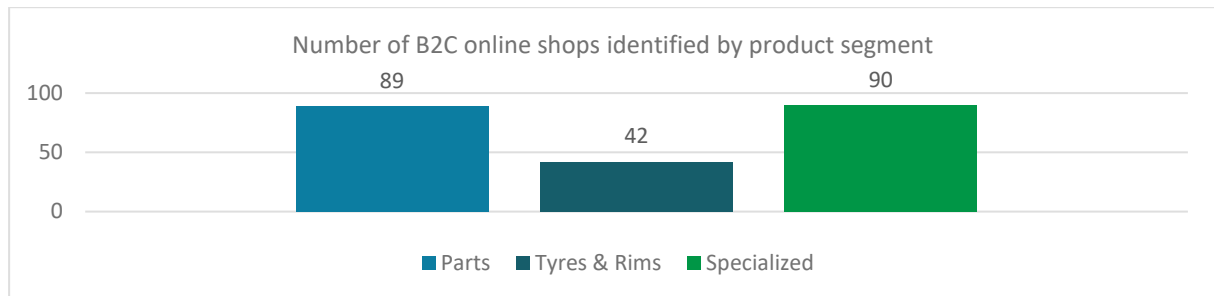
Parts product segment:

GMV¹¹ of the top 10 B2C shops: €114.8 million

KPI¹²: GMV/registered car €2.88

Number¹³ of identified shops: n = 89 of 221

With seven shops in the top 10 of the Italian market, Autodoc SE is the dominant force.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.auto-doc.it	Autodoc SE
2	www.norauto.it	Mobivia / NORAUTO ITALIA SPA
3	www.autoparti.it	Autodoc SE / Partex Global GmbH
4	www.espertoautoriscambi.it	Autodoc SE / Partio GmbH & Co. KG
5	www.mister-auto.it	Stellantis / Mister-Auto SAS
6	www.tuttoautoriscambi.it	Autodoc SE / Wemax Group GmbH & Co. KG
7	www.pezzidiriscambio24.it	Autodoc SE / Partio GmbH & Co. KG
8	www.motordoctor.it	Autodoc SE / Wemax Group GmbH & Co. KG
9	www.riscambi-smc.it	Riscambi SMC, Calzaretta Pasquale & CSrl
10	www.topautoriscambi.it	Autodoc SE

Autodoc SE share of the traffic: 79%

¹¹ Gross merchandizing volume (GMV) in €; estimate by the Speed4Trade algorithm

¹² Theoretical sales generated by the top 10 per registered vehicle

¹³ 'n =' is the number of parts shops, excluding used parts shops | 'of' is the total number of all AA-STARs shops (P, T, S) identified in the country, including used parts shops

Results – Country dossiers with the top 10 rankings | Parts segment

France (FR)

Number of registered cars in 2021: 38.7 million

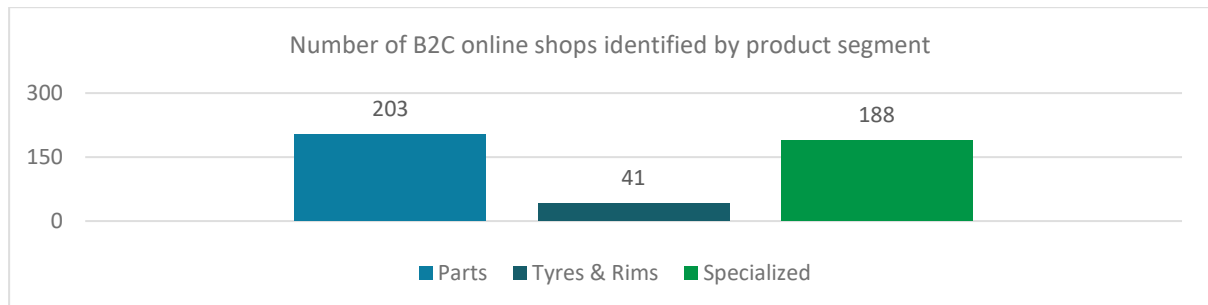
Parts product segment:

GMV of the top 10 B2C shops: €425.5 million

KPI: GMV/registered car €10.98

Number of identified shops: n = 203 of 432

With its five shops in the top 10, Autodoc SE is the market leader in France, albeit by a narrow margin.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.oscaro.com	Parts Holding Europe (PHE) / société OSCARO
2	www.norauto.fr	Mobivia / société Norauto France
3	www.auto-doc.fr	Autodoc SE
4	www.mister-auto.com	Stellantis / Mister-Auto SAS
5	www.feuvert.fr	FEU VERT SAS
6	www.piecesauto24.com	Autodoc SE / Partex Global GmbH
7	www.mecatechnic.com	MECATECHNIC SAS
8	www.piecesauto.fr	Autodoc SE / Wemax Group GmbH & Co.KG
9	www.piecesdiscount24.fr	Autodoc SE / Partio GmbH & Co. KG
10	www.motordoctor.fr	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 31%

Results – Country dossiers with the top 10 rankings | Parts segment

United Kingdom (UK)

Number of registered cars in 2021: 36.7 million

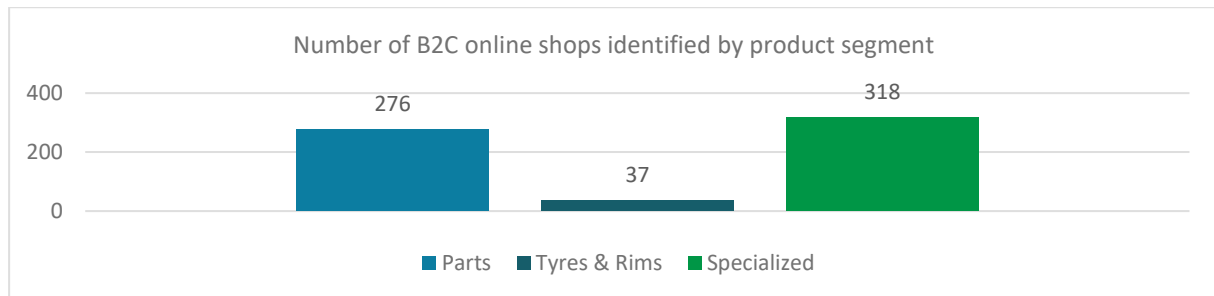
Parts product segment:

GMV of the top 10 B2C shops: €549.0 million

KPI: GMV/registered car €14.95

Number of identified shops: n = 276 of 631

Autodoc SE does not make it to second place, even if all five of its top 10 shops are added together.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.halfords.com	Halfords Limited
2	www.eurocarparts.com	LKQ / Euro Car Parts Limited
3	www.autodoc.co.uk	Autodoc SE
4	www.partsouq.com ¹⁴	PS AUTO GOODS WHOLESALERS L.L.C
5	www.kwik-fit.com	Kwik Fit (GB) Limited, United Kingdom
6	www.gsfcarsparts.com	Parts Alliance Group / German Swedish & French (GSF) Car Parts Limited
7	www.onlinecarparts.co.uk	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.buycarparts.co.uk	Autodoc SE / Partex Global GmbH
9	www.autopartspro.co.uk	Autodoc SE / Partio GmbH & Co. KG
10	www.euspares.co.uk	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 21%

¹⁴ <https://partsouq.com/en/terms-2.html> --> Company headquarters in the UAE; global distribution of traffic; classed as UK because the largest share of visitors – at just under 8% – comes from the United Kingdom

Results – Country dossiers with the top 10 rankings | Parts segment

Poland (PL)

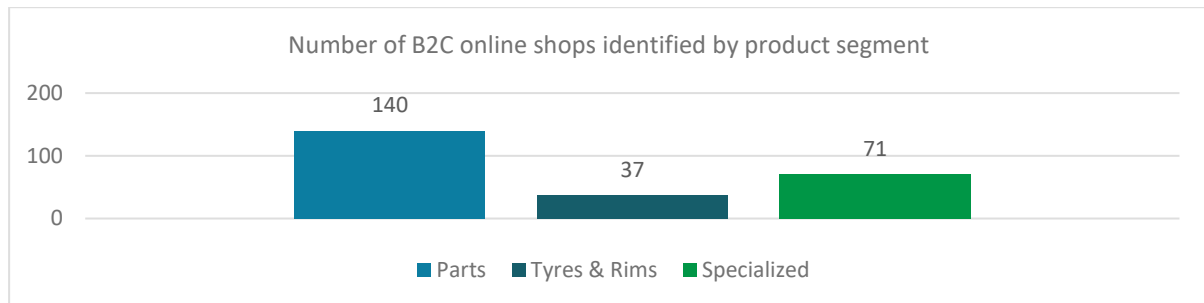
Number of registered cars in 2021: 25.9 million

Parts product segment:

GMV of the top 10 B2C shops: €117.0 million

KPI: GMV/registered car €4.52

Number of identified shops: n = 140 of 248



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autodoc.pl	Autodoc SE
2	www.iparts.pl	iParto Sp. z o.o.
3	www.intercars.pl	Inter Cars SA
4	www.czesciauto24.pl	Autodoc SE / Partex Global GmbH
5	www.ucando.pl	Ucando.pl
6	www.motostacja.com	Motostacja Sp z o.o.
7	www.autoczescionline24.pl	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.franceauto.pl	France Auto Sp. z o.o.
9	www.bmwstore.pl	Sikora AC Sp. z o.o.
10	www.sprzeglo.com.pl	GRUPA AUTONEO Sp. z o.o.

Autodoc SE share of the traffic: 43%

Results – Country dossiers with the top 10 rankings | Parts segment

Spain (ES)

Number of registered cars in 2021: 24.9 million

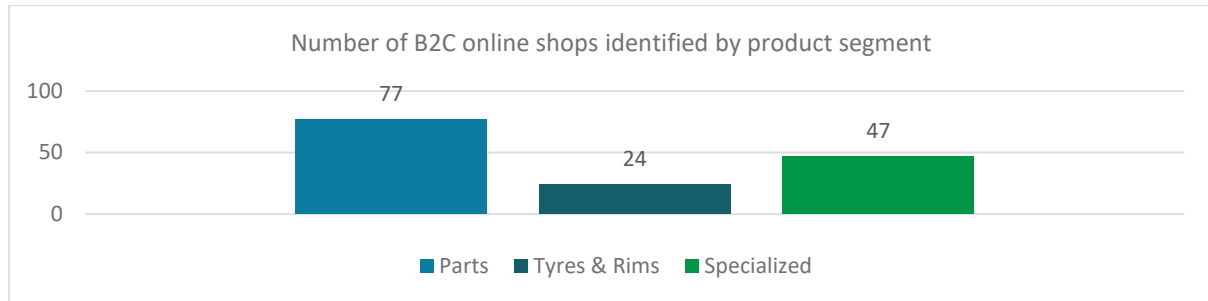
Parts product segment:

GMV of the top 10 B2C shops: €175.3 million

KPI: GMV/registered car €7.04

Number of identified shops: n = 77 of 148

Autodoc SE has 6 shops in the top 10 and therefore leads the market in Spain.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autodoc.es	Autodoc SE
2	www.norauto.es	Mobivia / NOROTO S.A.U
3	www.oscaro.es	Parts Holding Europe (PHE) / Oscaro SA
4	www.recambioscoches.es	Autodoc SE / Partex Global GmbH
5	www.feuvvert.es	FEU VERT IBÉRICA, SA
6	www.repuestoscoches24.es	Autodoc SE / Partio GmbH & Co. KG
7	www.motordocor.es	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.expertoautorecambios.es	Autodoc SE / Partio GmbH & Co. KG
9	www.endado.com	RECAMBIOS ENDADO SL.
10	www.recambioscoche.es	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 60%

Results – Country dossiers with the top 10 rankings | Parts segment

Netherlands (NL)

Number of registered cars in 2021: 8.8 million

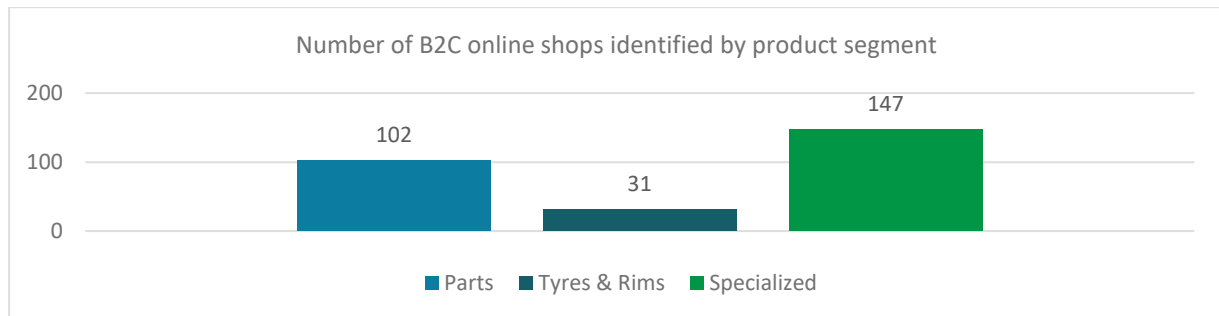
Parts product segment:

GMV of the top 10 B2C shops: €57.7 million

KPI: GMV/registered car €6.54

Number of identified shops: n = 102 of 280

Although no Autodoc SE shop is in pole position, the company remains the clear market leader in the Netherlands.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.winparts.nl	Winparts BV
2	www.autodoc.nl	Autodoc SE
3	www.auto-onderdelen24.nl	Autodoc SE / Partex Global GmbH
4	www.mijnautoonderdelen.nl	MD Automaterialen BV
5	www.besteonderdelen.nl	Autodoc SE / Wemax Group GmbH & Co.KG
6	www.mister-auto.nl	Stellantis / Mister Auto SAS
7	www.onderdelenshop24.com	Autodoc SE / Partio GmbH & Co. KG
8	www.auto-onderdelenexpert.nl	Autodoc SE / Partio GmbH & Co. KG
9	www.easycarparts.nl	EasyCarparts.nl Handelend
10	www.motor-doctor.nl	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 49%

Results – Country dossiers with the top 10 rankings | Parts segment

Romania (RO)

Number of registered cars in 2021: 7.6 million

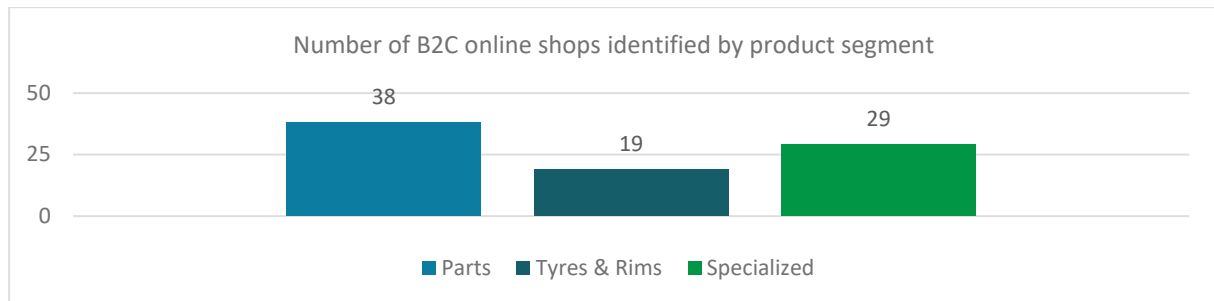
Parts product segment:

GMV of the top 10 B2C shops: €74.4 million

KPI: GMV/registered car €9.77

Number of identified shops: n = 38 of 86

EURO PARTS holds the market leadership in the Top 10 with its shops.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.epiesa.ro	SC EURO PARTS DISTRIBUTION SRL
2	www.autodoc24.ro	Autodoc SE
3	www.bardiauto.ro	BÁRDI AUTÓ ZRT.
4	www.autopieseonline24.ro	Autodoc SE / Partex Global GmbH
5	www.utb-shop.ro	UTB SHOP SRL
6	www.autoeco.ro	MOTORECO PARTS SRL
7	www.rapidauto.ro	S.C E-Autoparts / E-AUTOPARTS EUROPA SRL
8	www.unixauto.ro	UNIX AUTO SRL
9	www.targuldepiese.ro	SC EURO PARTS DISTRIBUTION SRL
10	www.bestautovest.ro	S.C E-Autoparts / E-AUTOPARTS EUROPA SRL

Autodoc SE share of the traffic: 28%

Results – Country dossiers with the top 10 rankings | Parts segment

Czechia (CZ)

Number of registered cars in 2021: 6.1 million

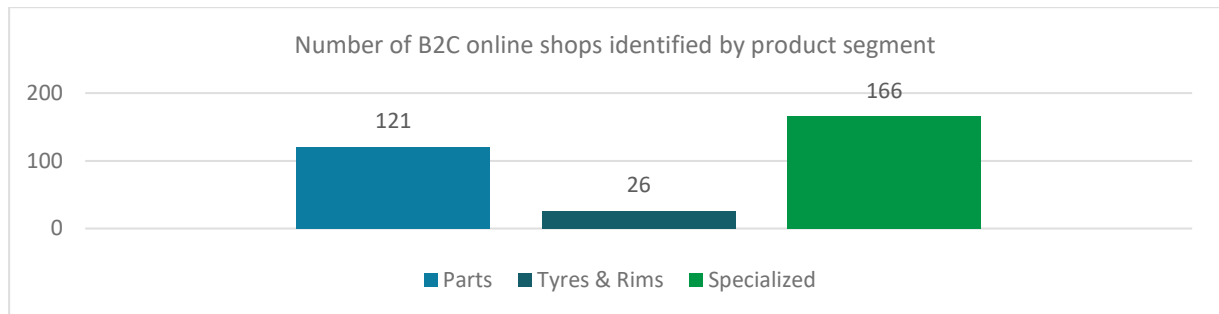
Parts product segment:

GMV of the top 10 B2C shops: €62.3 million

KPI: GMV/registered car €10.23

Number of identified shops: n = 121 of 313

LKQ leads the Czech market ahead of Autodoc SE.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autokelly.cz	LKQ CZ s.r.o.
2	www.lkq.cz	LKQ CZ s.r.o.
3	www.autodoc.cz	Autodoc SE
4	www.autodily-pema.cz	AUTODÍLY PEMA s.r.o.
5	www.motora.cz	ACI – Auto Components international, s.r.o. / TRUCK MOTOR, spol. s.r.o.
6	www.skoda-dily.cz	Škoda-díly.cz
7	www.automobilovedily24.cz	Autodoc SE / Partex Global GmbH
8	www.autokseft.cz	Autokšeft, s.r.o.
9	www.automedik.cz	AUTOMEDIK ESHOP s.r.o.
10	www.autodilos.cz	Novotný a spol.

Autodoc SE share of the traffic: 18%

Results – Country dossiers with the top 10 rankings | Parts segment

Belgium (BE)

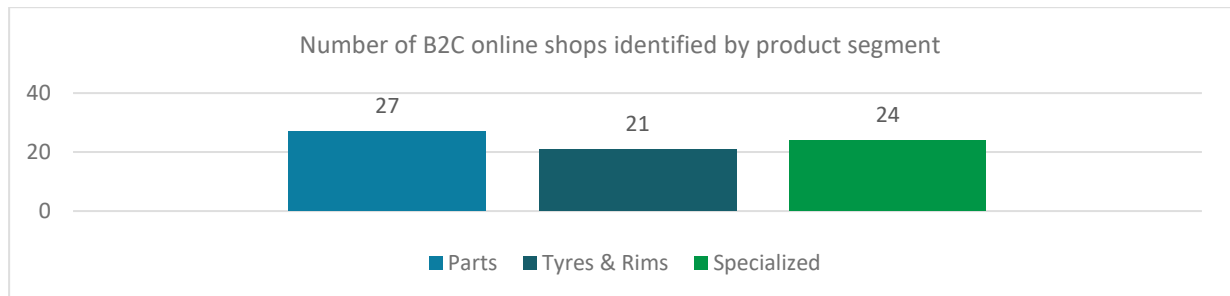
Number of registered cars in 2021: 5.9 million

Parts product segment:

GMV of the top 10 B2C shops: €30.9 million

KPI: GMV/registered car €5.20

Number of identified shops: n = 27 of 72



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.auto5.be	Mobivia / Auto5 NV
2	www.autodoc.be	Autodoc SE
3	www.auto-doc.be	Autodoc SE
4	www.winparts.be	Winparts BV
5	www.mister-auto.be	Stellantis / Mister-Auto SAS
6	www.oscaro.be	Parts Holding Europe (PHE) / oscaro.com SA
7	www.autoonderdelen24.be	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.piecesauto24.be	Autodoc SE / Partio GmbH & Co. KG
9	www.piecesautopro.be	Autodoc SE / Partio GmbH & Co. KG
10	www.mijnautoonderdelen.be	MD Automaterialen BV

Autodoc SE share of the traffic: 46%

Results – Country dossiers with the top 10 rankings | Parts segment

Portugal (PT)

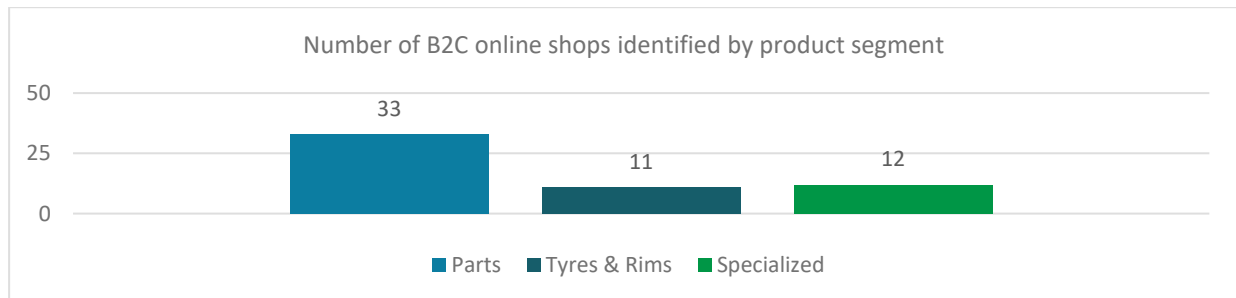
Number of registered cars in 2021: 5.6 million

Parts product segment:

GMV of the top 10 B2C shops: €46.1 million

KPI: GMV/registered car €8.19

Number of identified shops: n = 33 of 56



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.auto-doc.pt	Autodoc SE
2	www.norauto.pt	Mobivia / NORAUTO PORTUGAL - PEÇAS E ACESSÓRIOS PARA AUTOMÓVEL, S.A.
3	www.autopecasonline24.pt	Autodoc SE / Partex Global GmbH
4	www.pecasauto24.pt	Autodoc SE / Wemax Group GmbH & Co.KG
5	www.autopecas-online.pt	Autodoc SE / Partio GmbH & Co. KG
6	www.mister-auto.pt	Stellantis / Mister-Auto SAS
7	www.oscaro.pt	Parts Holding Europe (PHE) / oscaro.com SA
8	www.motordoctor.pt	Autodoc SE / Wemax Group GmbH & Co.KG
9	www.autopartslogistic.com	Countryparts Logistic, LDA
10	www.endado.pt	RECAMBIOS ENDADO SL.

Autodoc SE share of the traffic: 65%

Results – Country dossiers with the top 10 rankings | Parts segment

Greece (GR)

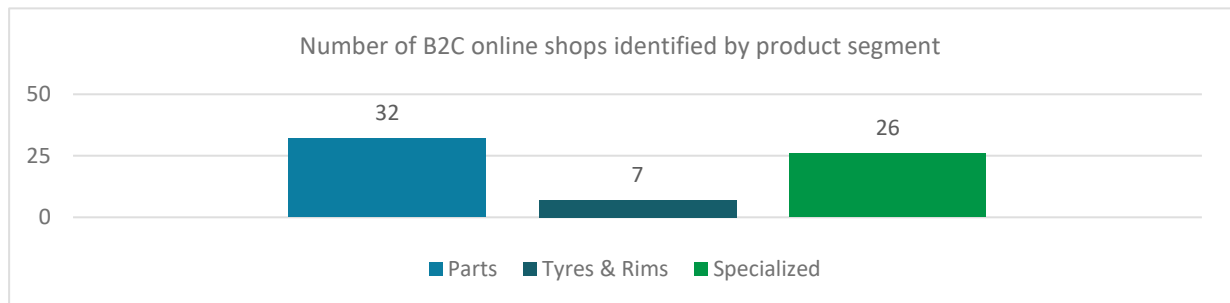
Number of registered cars in 2021: 5.6 million

Parts product segment:

GMV of the top 10 B2C shops: €22.1 million

KPI: GMV/registered car €3.93

Number of identified shops: n = 32 of 65



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autodoc.gr	Autodoc SE
2	www.antallaktikaonline.gr	Autodoc SE / Partex Global GmbH
3	www.onparts.gr	Onparts Mo. IKE
4	www.maxxparts.gr	MAXX PARTS MONOPROSSOPI IKE
5	www.antallaktikaexpertimata.gr	Autodoc SE / Wemax Group GmbH & Co.KG
6	www.getparts.gr	Vassileiou Charalambos & Co. OE
7	www.antallaktikaexpert.gr	Autodoc SE / Partio GmbH & Co. KG
8	www.motordoctor.gr	Autodoc SE / Wemax Group GmbH & Co.KG
9	www.economycarparts.gr	TSAKONAS G.S. IKE
10	www.euantallaktika.gr	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 67%

Results – Country dossiers with the top 10 rankings | Parts segment

Austria (AT)

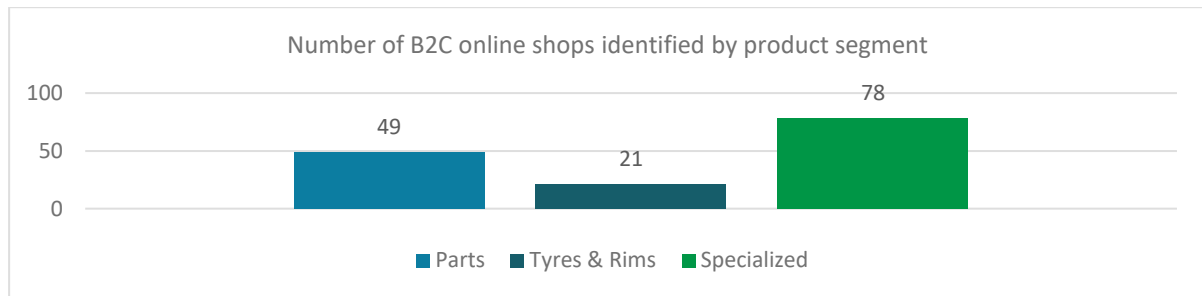
Number of registered cars in 2021: 5.1 million

Parts product segment:

GMV of the top 10 B2C shops: €20.5 million

KPI: GMV/registered car €4.00

Number of identified shops: n = 49 of 148



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.auto-doc.at	Autodoc SE
2	www.pkwteile.at	Autodoc SE / Partex Global GmbH
3	www.atp-autoteile.at	SAG / ATP Autoteile GmbH
4	www.teile-direkt.at	Autodoc SE / Wemax Group GmbH & Co.KG
5	www.autoersatzteile24.at	Autodoc SE / Partio GmbH & Co. KG
6	www.autoteile-direkt.at	Kfz Bestandteil Vertriebs GmbH
7	www.motointegrator.at	Inter Cars SA / CLEVERLOG-AUTOTEILE GmbH
8	www.atu.at	Mobivia / A.T.U Auto-Teile-Unger GmbH & Co KG
9	www.tarostrade.at	Taros Trade BG Ltd.
10	www.kfzteile24.at	kfzteile24 GmbH

Autodoc SE share of the traffic: 64%

Results – Country dossiers with the top 10 rankings | Parts segment

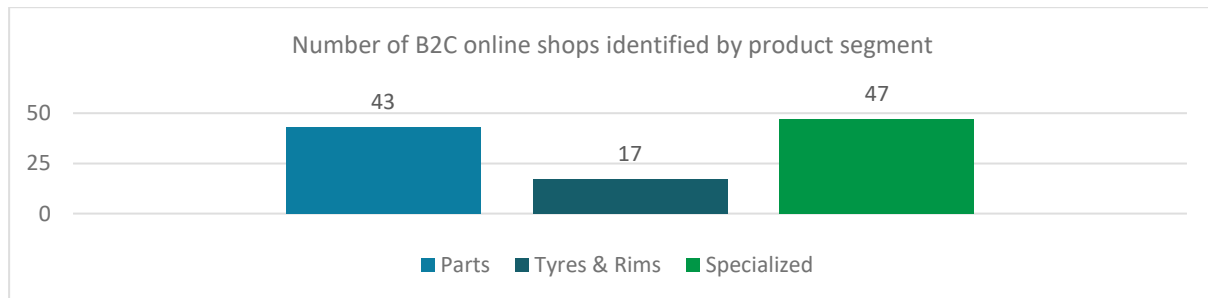
Sweden (SE)

Number of registered cars in 2021: 5.0 million

Parts product segment:

GMV of the top 10 B2C shops: €69.3 million
 KPI: GMV/registered car €13.90
 Number of identified shops: n = 43 of 107

Autodoc SE is the market leader with four shops in the top 10.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.mekonomen.se	Mekonomen Group (Mekonomen AB)
2	www.autodoc.se	Autodoc SE
3	www.skruvat.se	Skruvat Reservdelar AB
4	www.trodo.se	Trodo SIA
5	www.bildelaronline24.se	Autodoc SE / Partex Global GmbH
6	www.mekster.se	Mekster AB
7	www.vparts.se	VPARTS AB
8	www.vp-autoparts.se	VP Autoparts AB
9	www.bildelarexpert.se	Autodoc SE / Partio GmbH & Co. KG
10	www.reservdelar24.se	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 33%

Results – Country dossiers with the top 10 rankings | Parts segment

Switzerland (CH)

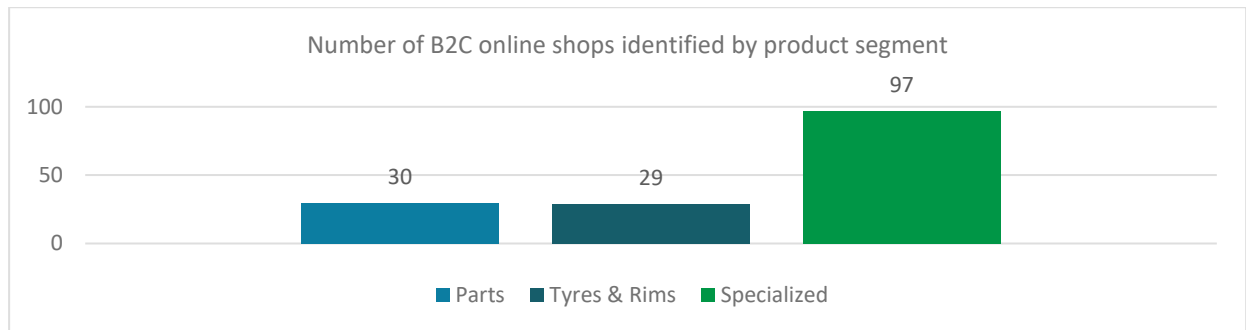
Number of registered cars in 2021: 4.8 million

Parts product segment:

GMV of the top 10 B2C shops: €14.8 million

KPI: GMV/registered car €3.09

Number of identified shops: n = 30 of 156



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.auto-doc.ch	Autodoc SE
2	www.autodoc24.ch	Autodoc SE
3	www.mister-auto.ch	Stellantis / Mister-Auto SAS
4	www.pkwteile.ch	Autodoc SE / Partex Global GmbH
5	www.teile-direkt.ch	Autodoc SE / Wemax Group GmbH & Co.KG
6	www.rupteur.ch	Rupteur AG
7	www.autoersatzteile24.ch	Autodoc SE / Partio GmbH & Co. KG
8	www.cagero.com	Cagero AG
9	www.carspoint.ch	Tratech GmbH
10	www.carlights.ch	Carlights, A. Hammel

Autodoc SE share of the traffic: 69%

Results – Country dossiers with the top 10 rankings | Parts segment

Hungary (HU)

Number of registered cars in 2021: 4.0 million

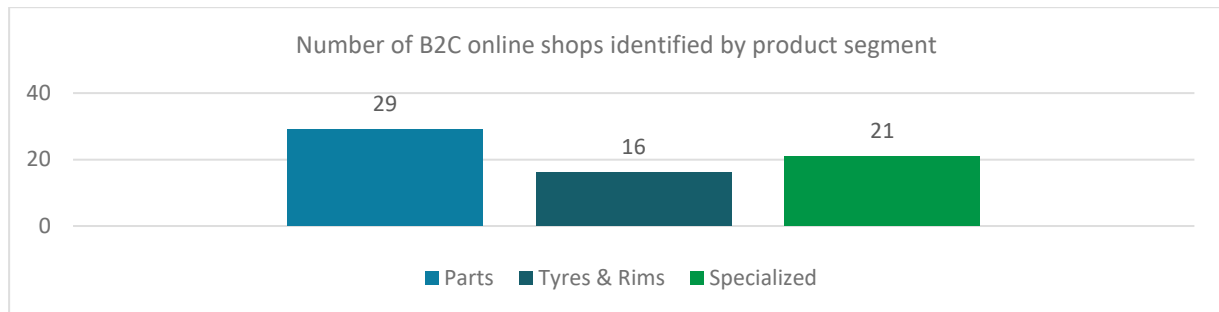
Parts product segment:

GMV of the top 10 B2C shops: €63.0 million

KPI: GMV/registered car €15.67

Number of identified shops: n = 29 of 66

Autodoc SE leads the market with its four shops in the top 10.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.bardiauto.hu	BÁRDI AUTÓ ZRT.
2	www.autodoc.hu	Autodoc SE
3	www.autoalkatreszonline24.hu	Autodoc SE / Partex Global GmbH
4	www.alkatreszek.hu	Kovacs Auto
5	www.unixauto.hu	UNIX Autó Kft.
6	www.autoalkatreszek24.hu	Autodoc SE / Wemax Group GmbH & Co.KG
7	www.aruhaz.kauffer.hu	Kauffer Áruház
8	www.kauffer.hu	Kauf-Fer Kft.
9	www.zsu.hu	ZS+U Autóalkatrész kereskedelmi Kft.
10	www.eualkatresz.hu	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 39%

Results – Country dossiers with the top 10 rankings | Parts segment

Finland (FI)

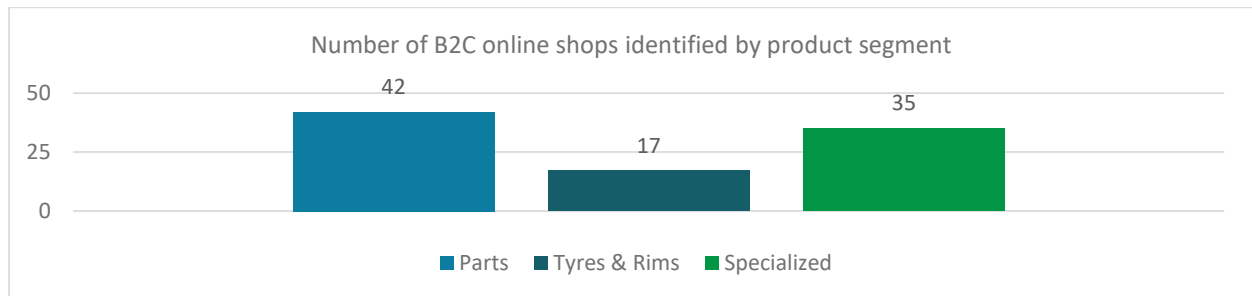
Number of registered cars in 2021: 3.6 million

Parts product segment:

GMV of the top 10 B2C shops: €22.6 million

KPI: GMV/registered car €6.19

Number of identified shops: n = 42 of 94



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autodoc.fi	Autodoc SE
2	www.autonvaraosat24.fi	Autodoc SE / Partex Global GmbH
3	www.aeromotors.fi	Aero Motors OY
4	www.trodo.fi	Trodo SIA
5	www.skruvat.fi	Skruvat Reservdelar AB
6	www.nimark.fi	Nimark Varaosat
7	www.topautoosat.fi	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.ak24.fi	Autokaubad24 OY
9	www.kl-varaosat.fi	KL-Parts Oy
10	www.autonvaraosatpro.fi	Autodoc SE / Partio GmbH & Co. KG

Autodoc SE share of the traffic: 62%

Results – Country dossiers with the top 10 rankings | Parts segment

Norway (NO)

Number of registered cars in 2021: 3.0 million

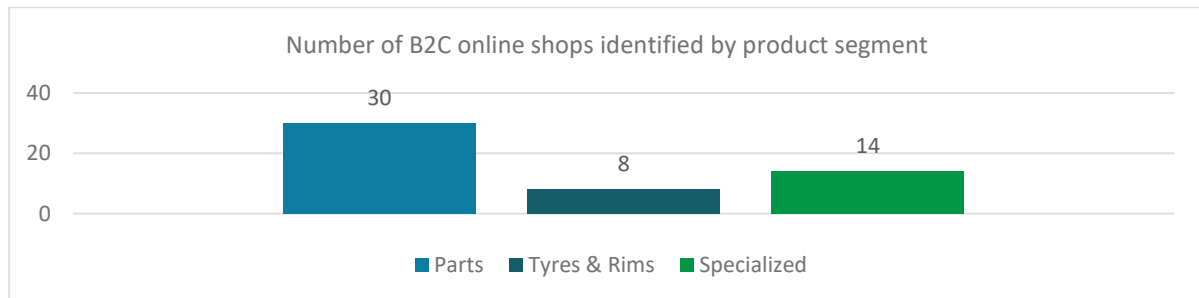
Parts product segment:

GMV of the top 10 B2C shops: €42.5 million

KPI: GMV/registered car €14.14

Number of identified shops: n = 30 of 52

Even with the aggregate results from its three shops, Autodoc SE takes second place in Norway, just behind Eurodel AS.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.skruvat.no	Skruvat Reservdelar AB
2	www.eurodel.no	Eurodel AS
3	www.autodoc.co.no	Autodoc SE
4	www.bildeler.no	Norsk Bildelsenter SA
5	www.mekonomen.no	Mekonomen Group (Mekonomen AB)
6	www.bilXtra.no	BilXtra
7	www.autodeler.co.no	Autodoc SE / Partex Global GmbH
8	www.gsbildeler.no	Gule Og Skrivarhaug Bildeler AS
9	www.nomax.no	Nomax2 AS
10	www.reservedeler24.co.no	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 21%

Results – Country dossiers with the top 10 rankings | Parts segment

Bulgaria (BG)

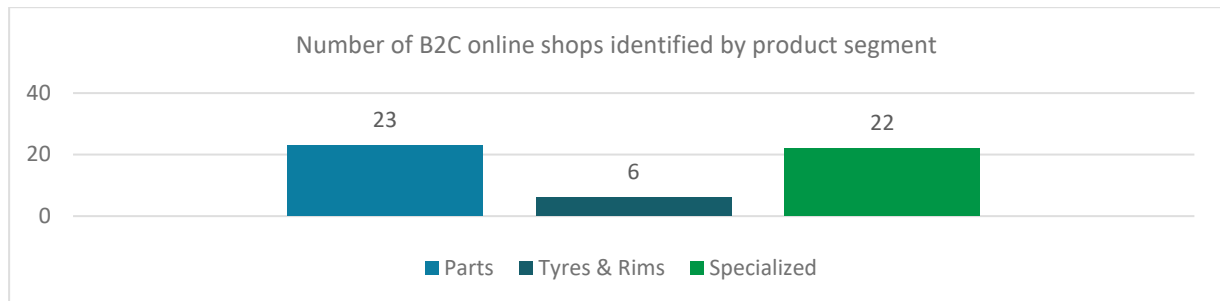
Number of registered cars in 2021: 2.8 million

Parts product segment:

GMV of the top 10 B2C shops: €40.3 million

KPI: GMV/registered car €14.22

Number of identified shops: n = 23 of 51



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autodoc.bg	Autodoc SE
2	www.autopower.bg	SM Group International Ltd.
3	www.avtochastionline24.bg	Autodoc SE / Partex Global GmbH
4	www.avto.bim.bg	Avto.Bim
5	www.avtosklad.bg	Taros Trade BG Ltd.
6	www.autokelly.bg	LKQ CZ s.r.o.
7	www.nasauto.bg	NasAuto Group EOOD
8	www.store.emk-33.com	EM COMPLETE 33 LTD
9	www.sauto.bg	Sauto
10	www.euavtochasti.bg	Autodoc SE / Wemax Group GmbH & Co.KG

Autodoc SE share of the traffic: 46%

Results – Country dossiers with the top 10 rankings | Parts segment

Denmark (DK)

Number of registered cars in 2021: 2.8 million

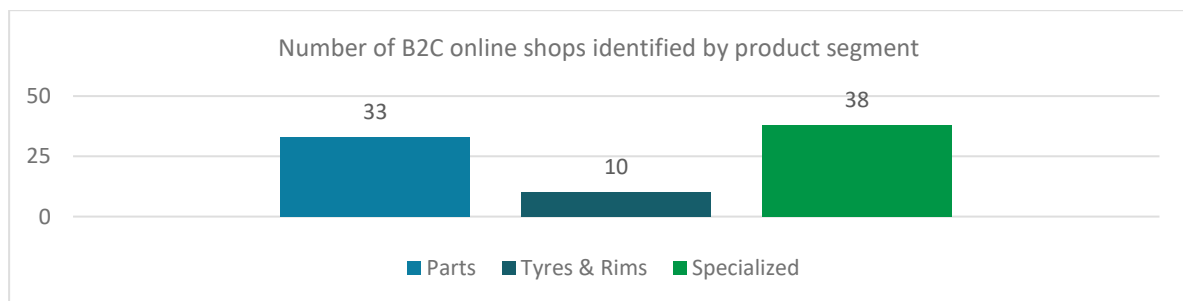
Parts product segment:

GMV of the top 10 B2C shops: €44.0 million

KPI: GMV/registered car €15.78

Number of identified shops: n = 33 of 81

The T. Hansen Gruppe is number 1 in Denmark by a huge margin.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.thansen.dk	T. Hansen Gruppen A/S
2	www.autodoc.dk	Autodoc SE
3	www.bildeleshop.dk	Autodoc SE / Partex Global GmbH
4	www.ladaworld.com	LADA World
5	www.refako.dk	Refako ApS
6	www.schmiedmann.dk	Schmiedmann Odense A/S, Schmiedmann Nordborg A/S
7	www.autodeleshop.dk	Autodoc SE / Wemax Group GmbH & Co.KG
8	www.bildeleekspert.dk	Autodoc SE / Partio GmbH & Co. KG
9	www.autodele24.dk	Autodoc SE
10	www.autodele24.com	Autodoc SE

Autodoc SE share of the traffic: 19%

Results – Country dossiers with the top 10 rankings | Parts segment

Slovakia (SK)

Number of registered cars in 2021: 2.5 million

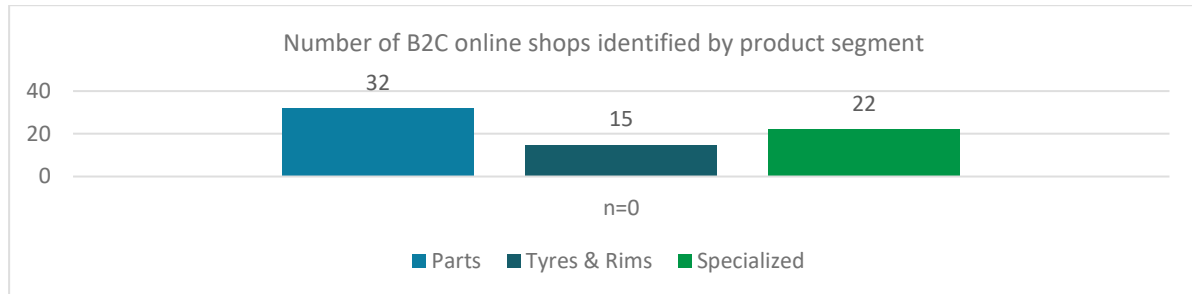
Parts product segment:

GMV of the top 10 B2C shops: €26.0 million

KPI: GMV/registered car €10.42

Number of identified shops: n = 32 of 69

Autodoc SE is the market leader in Slovakia with five shops in the top 10.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.autodielygafa.sk	GAFA AUTO s.r.o.
2	www.autodoc.sk	Autodoc SE
3	www.autodielyonline24.sk	Autodoc SE / Wemax Group GmbH & Co.KG
4	www.autokelly.sk	LKQ CZ s.r.o.
5	www.skoda-diely.sk	online-dily.cz s.r.o.
6	www.comco.sk	COMCO, s.r.o.
7	www.autodielyexpert.sk	Autodoc SE / Partio GmbH & Co. KG
8	www.euroautodiely.sk	Autodoc SE / Wemax Group GmbH & Co.KG
9	www.bardiauto.sk	BÁRDI AUTÓ ZRT.
10	www.rexbo.sk	Autodoc SE

Autodoc SE share of the traffic: 49%

Results – Country dossiers with the top 10 rankings | Parts segment

Ireland (IE)

Number of registered cars in 2021: 2.3 million

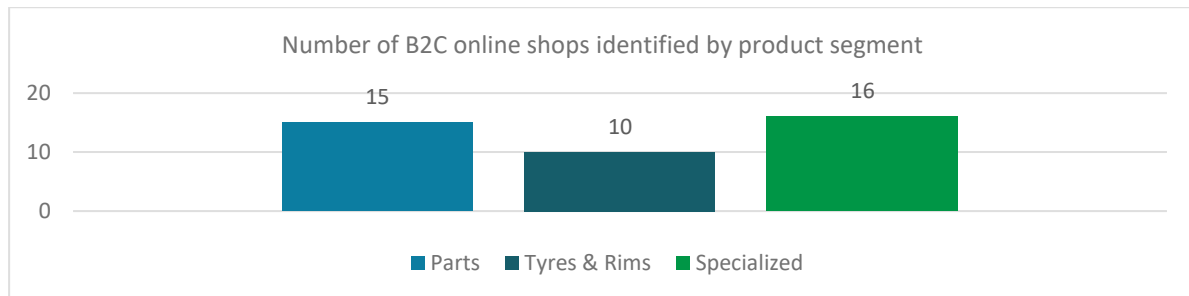
Parts product segment:

GMV of the top 10 B2C shops: €29.4 million

KPI: GMV/registered car €12.73

Number of identified shops: n = 15 of 41

With its two shops in the top 10, Autodoc SE is the market leader in Ireland, albeit by a narrow margin.



Ranking Index 2023	Top automotive aftersales online shops (URL)	Company
1	www.micksgarage.com	Crean Solutions Limited
2	www.auto-doc.ie	Autodoc SE
3	www.car-parts.ie	Autodoc SE
4	www.mister-auto.ie	Stellantis / Mister-Auto SAS
5	www.winparts.ie	Winparts BV
6	www.irishautoparts.ie	Irish Auto Parts
7	www.partsforcars.ie	PartsforCars
8	www.motorparts.ie	MotorParts.ie
9	www.omsautoparts.ie	OMS Auto Parts
10	www.vantopia.ie	Paul Gillett T/A Vantopia

Autodoc SE share of the traffic: 43%

Background information on the study

The objective

Unlike other studies, Speed4Trade takes a closer look at the actual size of the B2C online shop market in the automotive aftermarket. From the perspective of its target, namely 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 and interviews – with all their limitations – and concentrate instead on what the online customer actually sees. A bottom-up approach so to speak.

The market structure

It makes sense to divide the automotive aftermarket into three primary product 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 been included since the second edition of AA-STARs.

Specialized

This product 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, specialised shops are found in the Specialized/Others product range.

- 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

Research of the online shops

The research is performed according to the following procedure:

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

6,754 online shops that fulfil the following criteria¹⁵ were included in the index:

- B2C shop, active and functional
- Automotive aftersales range (segment P, T or S)
- Aftersales range for passenger cars/light vehicles
- Assignment to a European country (if the country with the highest traffic is in Europe)
- Countries are only included in the publication if they had with more than 2 million registered cars in 2021 (excluding Turkey and Ukraine)

8.7% of online shops closed or 'relocated' during the past year.

587 online shops dropped out of the index during the reporting period for AA-STARs 6 due to inactivity or a change of domain, accounting for 8.7% (7.4% in AA-STARs 5 and 6.4% in AA-STARs 4).

Segment	Inclusion in the index (number of shops)	Inclusion in the ranking (number of shops)
Parts	2,553	1,948
Tyres & Rims	791	558
Specialized	3,410	2,411
TOTAL	6,754	4,917

The shop's total 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 in annual sales 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 some cases, the algorithms use average values for the automotive aftermarket, which are based on actual data analyses and are regularly adjusted.

¹⁵ Europe-wide for the first time, 35 countries including Germany

Regression analyses are used to minimize errors in the market calculations. The use of averages means that the revenues for each individual shop may deviate upwards or downwards. However, the overall market size is reflected quite well by this optimization.

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 other countries. It is rare for B2C shops to have only one country in which they deliver. Shop sales are assigned to the country based on the shop's country-specific domain name extension. The country accounting for the largest share of traffic is used for extensions that do not refer to a specific country (such as .com or .net). Sales are not broken down to the level of multiple countries.

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 omni-channel) 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. Some companies even have several shops in the top 10.

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

What do you need?

Our promise!

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

The AA-STARS index focuses on a small section of the automotive aftermarket¹⁶ – primarily B2C online shops in Europe 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 yet even know.

Feel free to enquire about other market information that you require.

[Yes, let's talk!](#)

Click on the button to send us an enquiry about discussing your data requirements – with no further commitment. We look forward to hearing from you!

¹⁶We generally only show you a small excerpt (e.g. the top 10 or 25) in our AA-STARS study. Please contact us if you would like access to more data.

Publisher | Responsible for the content

About Speed4Trade – Smart digital commerce and service platforms

Speed4Trade supports companies in digitalising and automating their trading and service processes. The software provider specialises in setting up digital sales and service platforms and integrating them into existing IT systems. Since 2005, Speed4Trade has stood for first-class software products, high-performance interfaces and excellent project know-how. The experienced software architects accompany their customers in all project phases – from the initial idea to successful implementation. More than 250 manufacturers and retailers from 19 countries, B2B as well as B2C, gain access to more customers and sales securely, reliably and efficiently thanks to Speed4Trade. This is, what 100 employees at the company headquarters in Altenstadt a. d. Waldnaab in Bavaria are working for every day.

www.speed4trade.com

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customers through
digital solutions
–
from Speed4Trade.

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