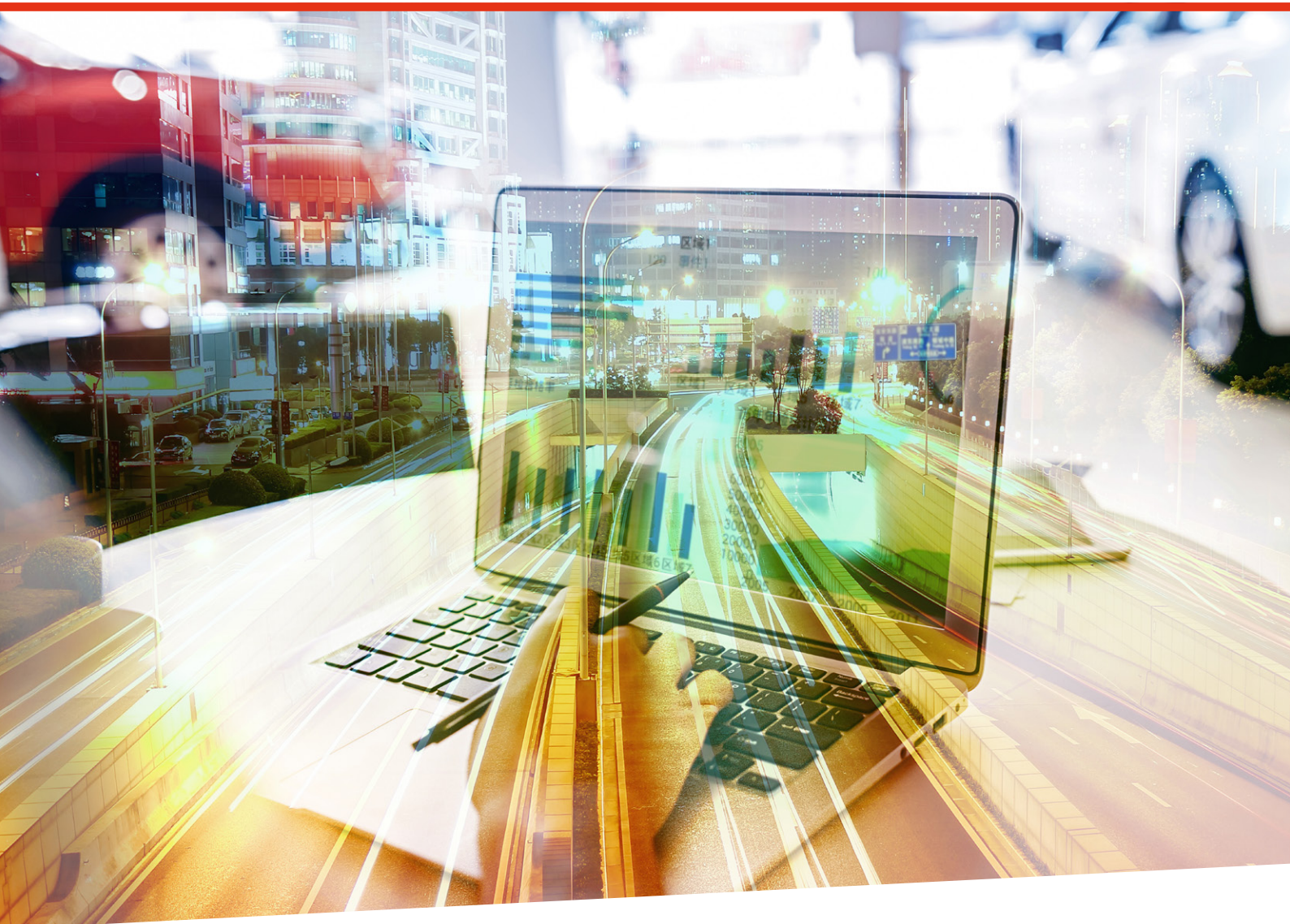


TOPMOTIVE

www.topmotive.eu



AFTERMARKET REPORT 2020

Februar 2021

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// ABOUT US

Since 1994, our world is spinning around information systems as well as services for the Automotive Independent Aftermarket (IAM). In this area, we are Europe's market leader and rely on our team of more than 280 automotive and IT experts. With twelve subsidiaries, our TOPMOTIVE Group is represented at nine locations in five countries. From the very beginning until today, we set examples with our innovations at the market. We pursue the goal to keep our customers up to date with path-breaking products and services.

And the most important thing: we never stop learning. We use the knowledge, data and facts from our information systems and apply them in a targeted manner to drive the products even further. We analyze and evaluate – and draw the right conclusions for our customers. Find out in this analysis report what these learnings are about and how you can make use of them in your daily business.



// DATA BASIS FOR THIS REPORT

OUR DATA BASIS

Our information systems are used in several European countries for identifying and ordering spare parts. We collect the usage data which provides the basis for the following analysis. Since our company is based in Germany, we have historically a strong customer basis in the DACH region counting **over 200.000 touch points per day**. Therefore, the following analysis is based on our usage data from Germany, Austria and Switzerland.

Spare parts identification in our information systems can be achieved through a direct product search or a prior vehicle selection. Selecting a vehicle provides an easy way for our users to find the right product without knowing the specific product number. The number of vehicle selections are used to analyze car manufactures and compare between different car models in the following report.

DISCLAIMER

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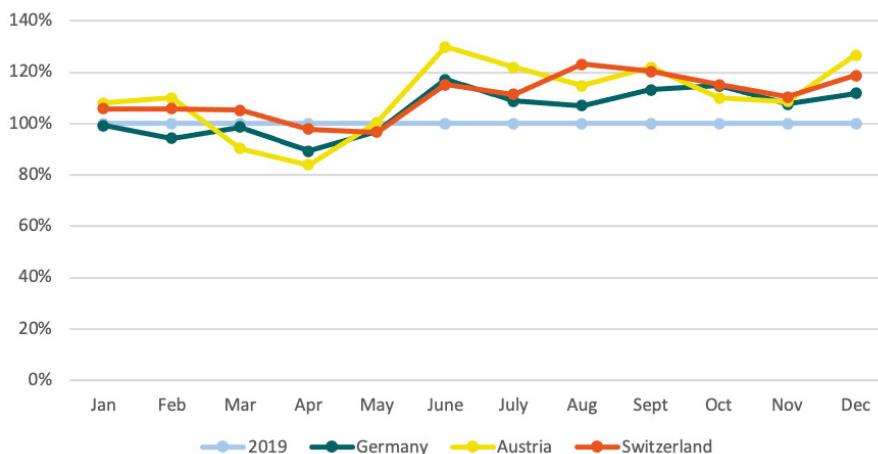
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1.

// AFTERMARKET OVERVIEW – DACH 2020

1.1 PARTS DEMAND DURING COVID-19 PANDEMIC

PARTS DEMAND 2020 VS. 2019



Growth in 2020 compared to 2019:

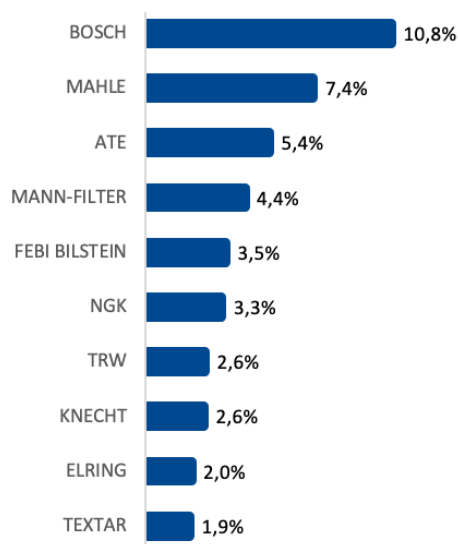
- Germany: + 5%
- Austria: + 10%
- Switzerland: + 10%

The beginning of the Covid-19 pandemic caused a decrease in parts demand between March and April 2020. Despite the ongoing pandemic during 2020, the DACH region showed sustainable growth, reaching 10% in Austria and Switzerland.

1.

// AFTERMARKET OVERVIEW – DACH 2020

1.2 BRANDS AND PRODUCT GROUPS

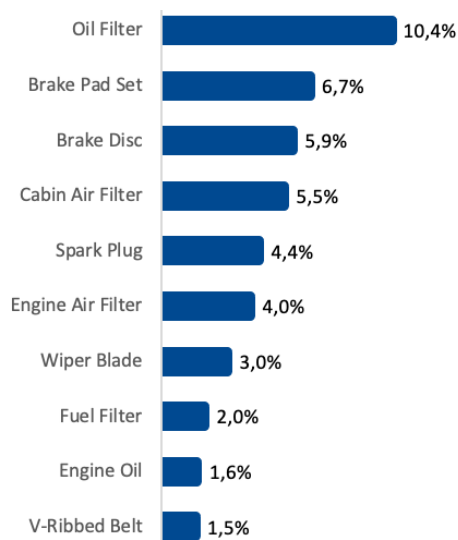


BRANDS

According to our analysis, 10,8% of all demanded products were identified as Bosch spare parts, making it the most popular brand within the region DACH in 2020.

PRODUCT GROUPS

The oil filter was the most popular product group according to our analyses, followed by brake pad set and brake disc.



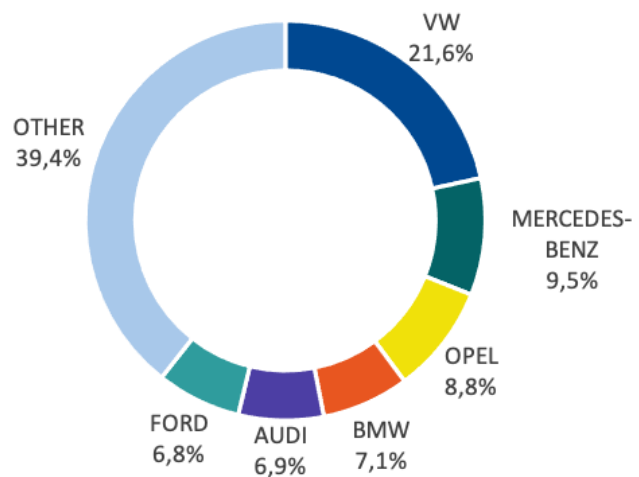
1.

// AFTERMARKET OVERVIEW – DACH 2020

1.3 VEHICLE SELECTIONS

VEHICLE SELECTION

The vehicle selection function in our information systems provides a quick and easy way to identify spare parts for a certain vehicle. The diagram gives an overview of the most selected car manufacturers in 2020.



TOP THREE VEHICLE SELECTIONS BY CAR MANUFACTURER

VOLKSWAGEN

1. GOLF IV (1997 – 2003)
2. GOLF V (2003 – 2008)
3. POLO IV (2001 – 2009)

MERCEDES-BENZ

1. A-CLASS "W169" (2004 – 2012)
2. B-CLASS "W245" (2005 – 2011)
3. E-CLASS "W211" (2002 – 2009)

OPEL

1. CORSA D (2006 – 2014)
2. CORSA C (2000 – 2006)
3. MERIVA A (2003 – 2009)

BMW

1. 3 Touring "E91" (2005 – 2012)
2. 1 "E87" (2004 – 2011)
3. 3 "E90" (2005 – 2011)

AUDI

1. A4 Avant "B8" (2007 – 2015)
2. A3 "8P" (2003 – 2013)
3. A3 Sportback "8PA" (2004 – 2012)

FORD

1. FIESTA '09 (2008 – 2017)
2. FIESTA '02 (2001 – 2008)
3. FOCUS Turnier '11 (2010 – 2018)

2.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2020

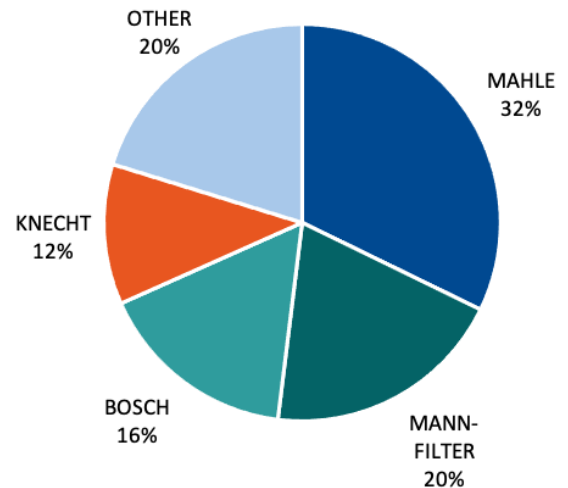
2.1 SERVICE AND MAINTENANCE

OIL FILTER

Top Vehicle Selection

1. VW Polo V
2. Opel Corsa D
3. VW Golf VII

Nearly half of all oil filters selected in our information systems were manufactured by MAHLE, considering Knecht as a brand of MAHLE. The VW Polo V was the most selected vehicle for this product group.

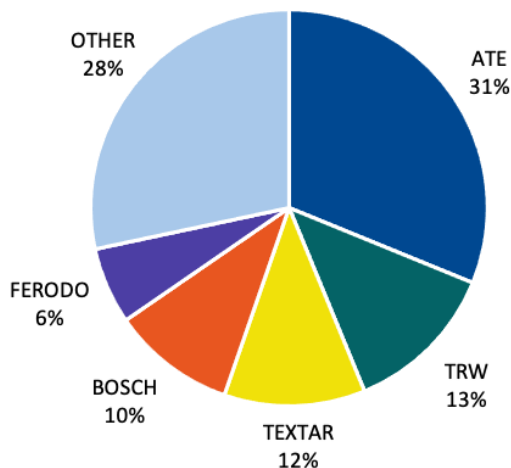


BRAKE PAD SET

Top Vehicle Selection

1. VW Golf V
2. VW Golf VI
3. OPEL Corsa D

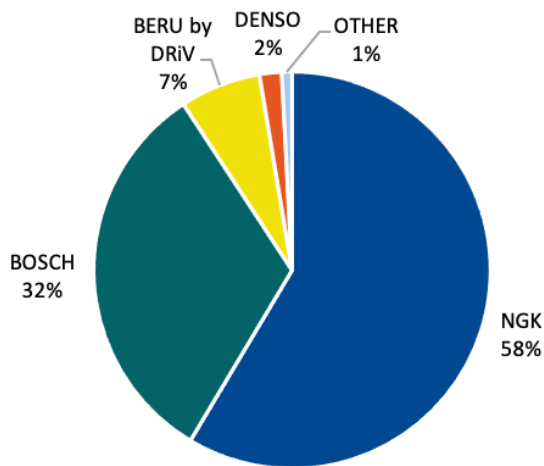
When it comes to brake pad sets, ATE was the most selected brand. Yet, 28% did not belong to the top five brands, indicating more competition for this product group. The most selected vehicle was the VW Golf V.



2.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2020

2.2 MOTOR



SPARK PLUG

Top Vehicle Selection

1. Opel Corsa D
2. VW Polo V
3. VW Polo IV

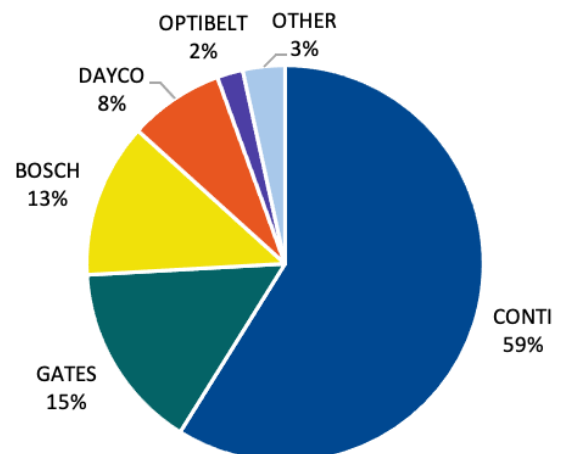
Reaching almost 60%, NGK was by far the most selected brand for spark plugs, followed by Bosch with 32%. The top four brands made up 99% of all selected spark plugs, indicating little competition for this product group.

V-RIBBED BELT

Top Vehicle Selection

1. Ford Fiesta '09
2. VW Golf IV
3. VW Golf VI

When it comes to v-ribbed belts, Continental was by far the most popular brand in 2020, leaving the competition far behind. The Ford Fiesta '09 was the most selected vehicle in combination with a v-ribbed belt.



2.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2020

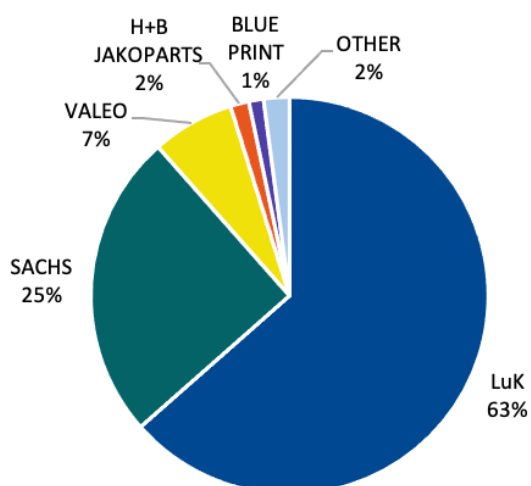
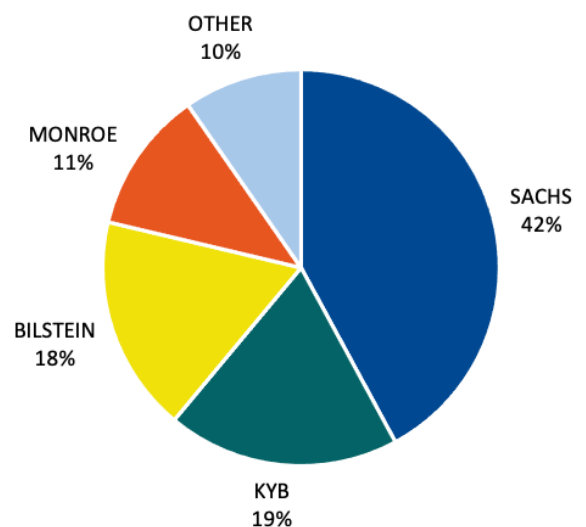
2.3 POWERTRAIN AND CHASSIS

SHOCK ABSORBER

Top Vehicle Selection

1. Opel Corsa D
2. VW Polo V
3. BMW 3 Touring "E91"

SACHS was the dominant brand for shock absorbers in 2020, followed by KYB and Bilstein. The car model Opel Corsa D was the most selected vehicle for a shock absorber.



CLUTCH KIT

Top Vehicle Selection

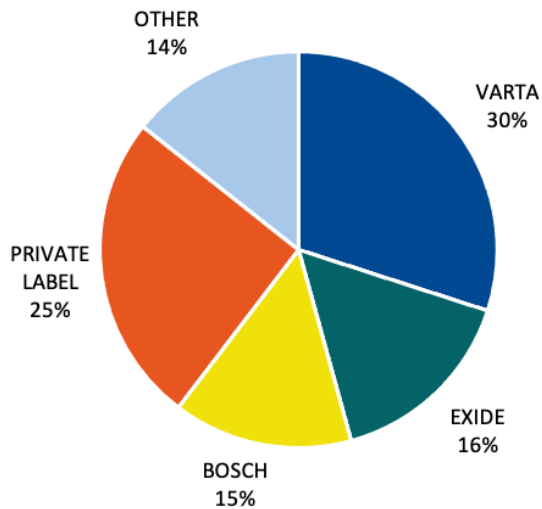
1. VW Golf IV
2. VW Golf V
3. VW Touran I

According to our analysis, LuK reached over 60% of share for the product group clutch kit. The top five brands made up 98% of all selected clutch kits.

2.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2020

2.4 ELECTRIC



STARTER BATTERY

Top Vehicle Selection

1. VW Polo V
2. VW Polo IV
3. VW Golf IV

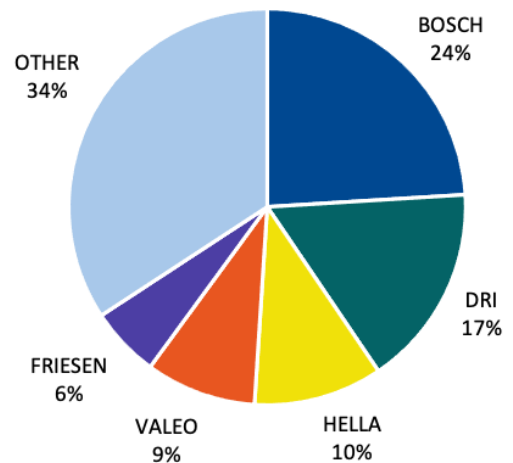
When it comes to starter batteries, VARTA was the most popular brand in 2020. The car model VW Polo V was the most selected vehicle in combination with a starter battery.

ALTERNATOR

Top Vehicle Selection

1. VW Golf IV
2. Ford Focus Turnier '04
3. VW Transporter IV Bus

Bosch was the most selected brand for alternators in 2020. Yet, 34% of alternator selections did not belong to the top five brands, indicating higher competition for this product group.



2.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2020

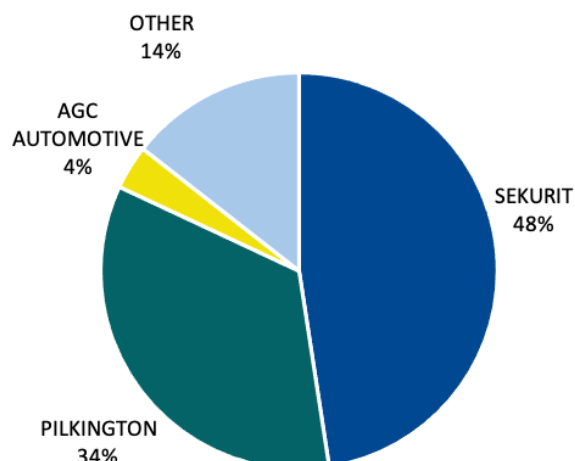
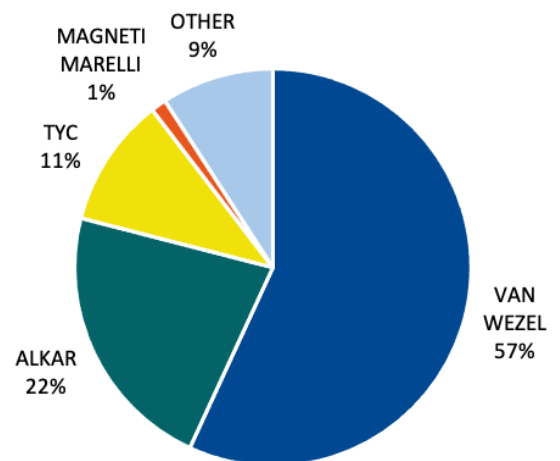
2.5 CAR BODY

SIDE-VIEW MIRROR

Top Vehicle Selection

1. VW Polo IV
2. VW Transporter V Box
3. Fiat Ducato "250"

Reaching nearly 60% of all selected side-view mirrors, Van Wezel was by far the most selected brand. The VW Polo IV was the top vehicle selection for this product group.



WINDSHIELD

Top Vehicle Selection

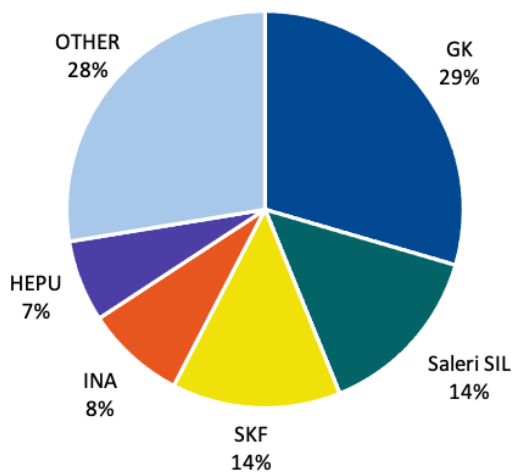
1. VW Transporter IV Bus
2. VW Golf IV
3. VW Polo IV

Two popular brands were identified in connection with the product group windshield in 2020. Sekurit and Pilkington made up 82% of all windshield selections. The top vehicle selection was the VW Transporter IV Bus.

2.

// TOP BRANDS BY PRODUCT GROUPS – DACH 2020

2.6 HEATING AND COOLING



WATER PUMP

Top Vehicle Selection

1. BMW 3 Coupe "E46"
2. VW Golf VI
3. Opel Corsa D

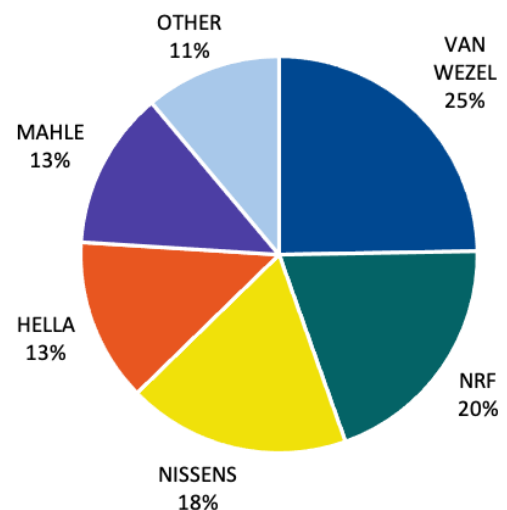
GK was the most selected brand when it comes to water pumps. 28% did not belong to the top five brands, indicating higher competition for this product group. The most selected vehicle in combination with water pumps was the BMW 3 Coupe "E46".

ENGINE RADIATOR

Top Vehicle Selection

1. VW Golf V
2. VW Golf IV
3. BMW 3 "E46"

Not a single dominant brand could be identified for the product group engine radiator in 2020. Van Wezel, NRF and Nissens are quite close together. The top vehicle selection was the VW Golf V.



// INTERESTED IN MORE DETAILED DATA?

If you are interested in improving your data quality for the POS, please do not hesitate to contact us. We offer individual service solutions suiting your special requirements composed by our automotive and data experts. These solutions include the following:

PRODUCT RELEVANCY ANALYSIS

We offer product relevancy analysis depending on the product group you wish, to help you prioritize your product portfolio and improve parts identification. Repair cases are often triggered by keywords or numbers, thus the right and sufficient information is needed in the identification process of spare parts. Interested in what our users are searching for? We can provide you with this information according to the product group you wish.

VEHICLE RELEVANCY ANALYSIS

The IAM is not solely based on VIO (vehicles in operation) in regional markets, it is important to identify the “popular” vehicles when it comes to high parts demand. This information is crucial in order to determine the best product portfolio strategy. In this regard, repair cases give a more accurate view than VIO. We can support you to identify the right vehicles for specific markets.

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