



AUTOMOTIVE AFTERMARKET 2025+

Challenges and Opportunities

Project references



- Aftermarket entry and growth strategies for suppliers
- M&A activities and value capture
- Operations optimization (procurement, footprint, distribution, etc.)
- Operating model design and implementation

Project examples and offering

Thought leadership

Ongoing knowledge development and publication through studies and magazines



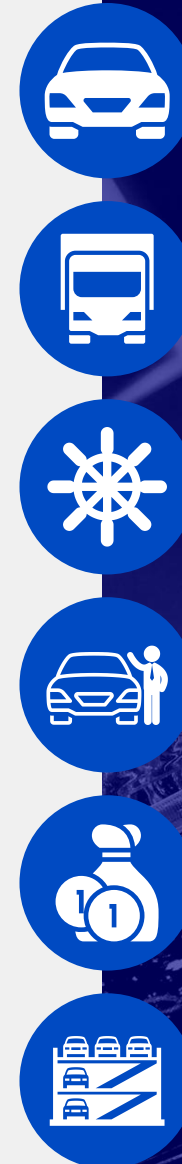
Roland Berger Aftermarket

- Develop online marketplace and omnichannel presence
- Digital, innovation and AI strategy
- Develop and implement pricing strategies
- ...

Open platform for aftersales heads to regularly meet, exchange and network



Industry collaboration



TOPICS FOR TODAY



1

How is the automotive aftermarket expected to develop?

2

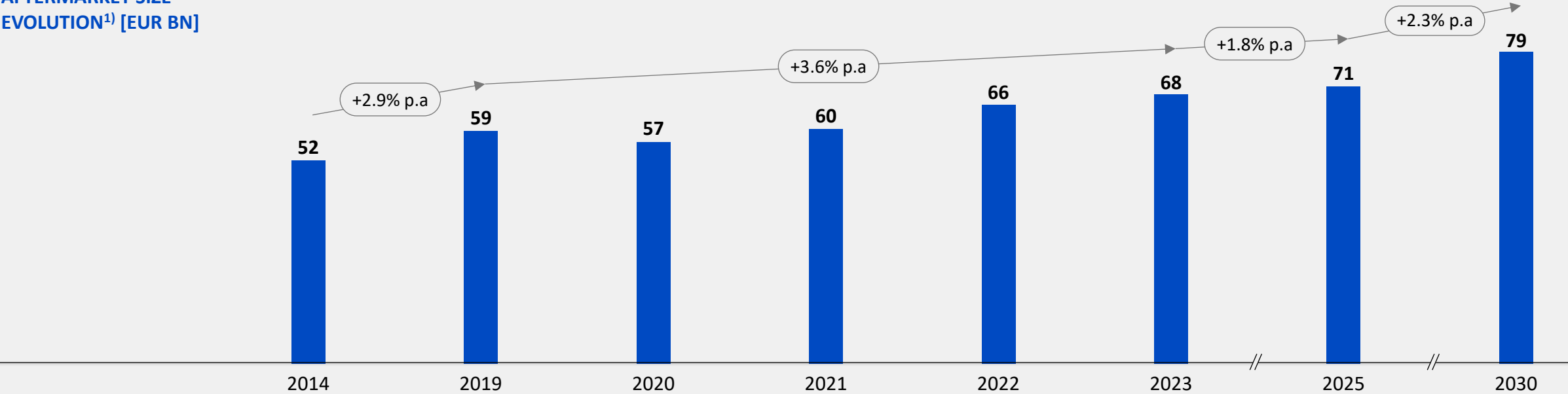
What are key challenges going forward?

3

How to leverage digitalization to address challenges and beat competition?

The aftermarket is expected to continue to grow at reduced pace

AFTERMARKET SIZE
EVOLUTION¹⁾ [EUR BN]



CAR PARC [UNITS
M]



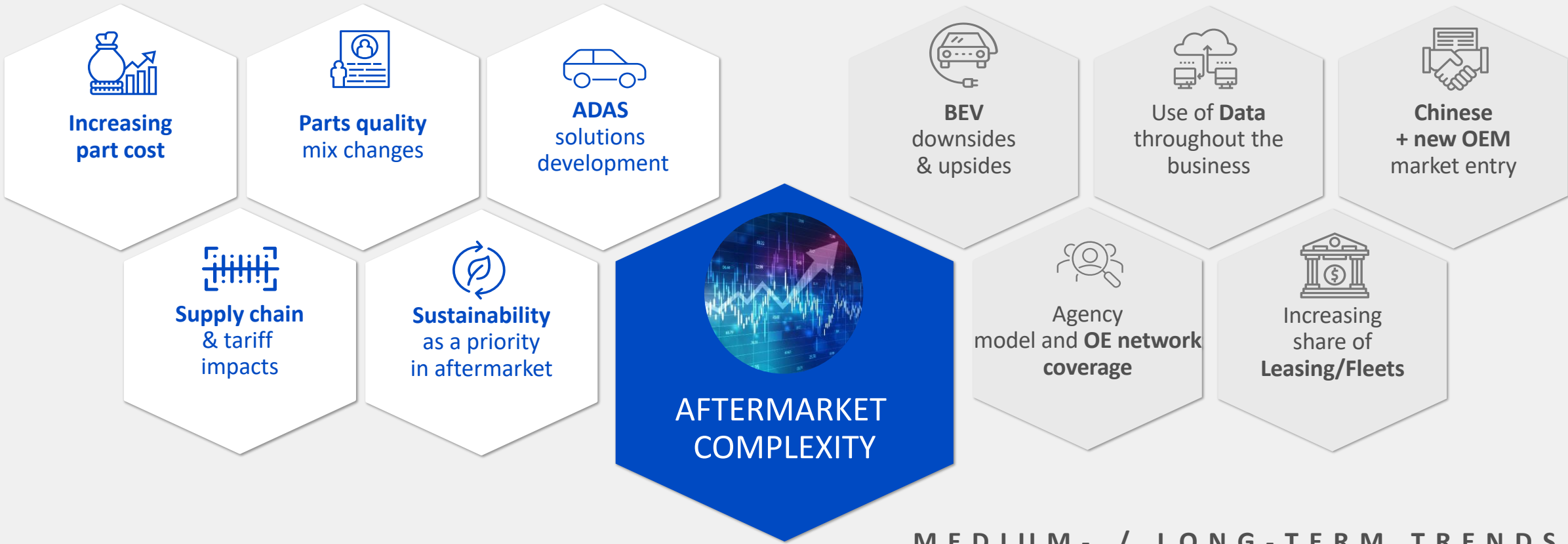
VEHICLE AGE [#
YEARS]



1) Market scope limited to maintenance (excl. oil), repair (technical & non-technical) and body parts

Both short-term economic and long-term structural trends contribute

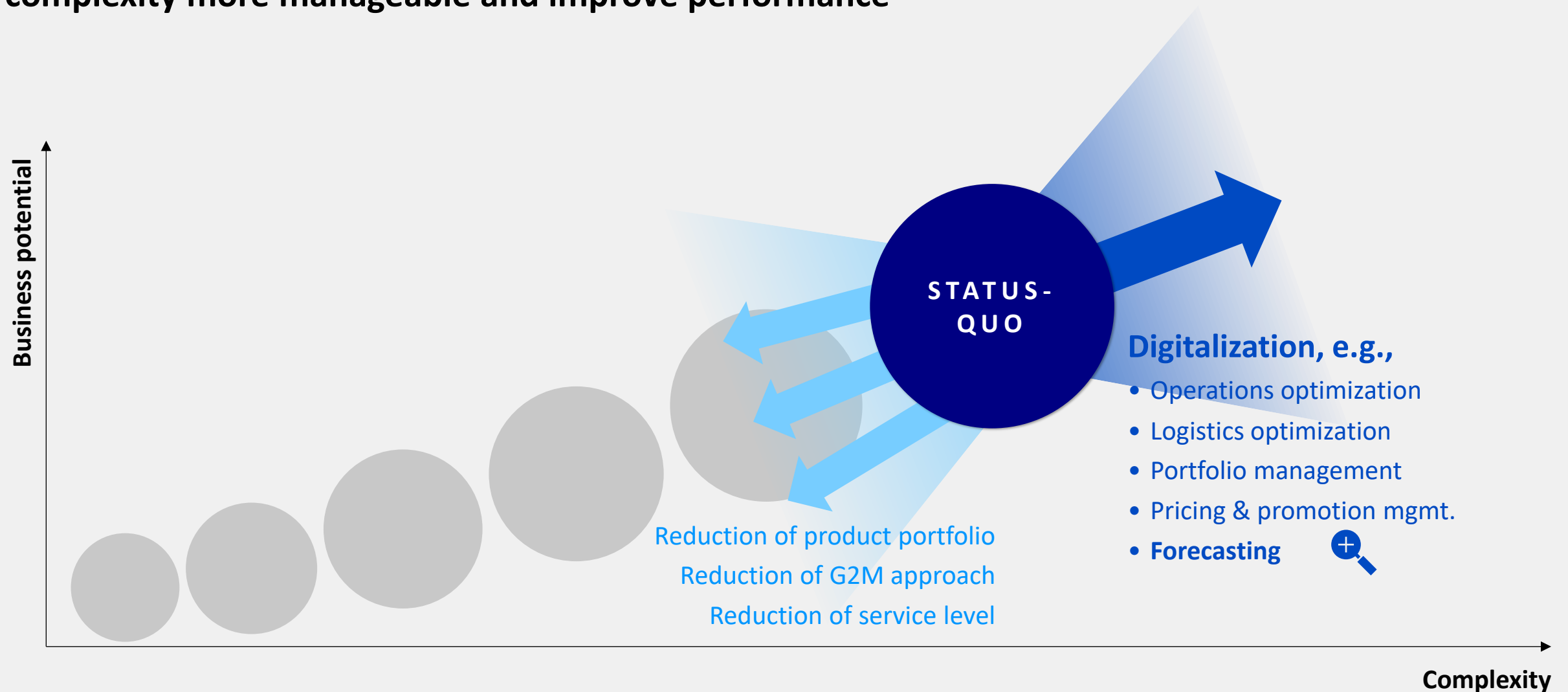
SHORT-TERM TRENDS



However, complexity is expected to continue to increase significantly

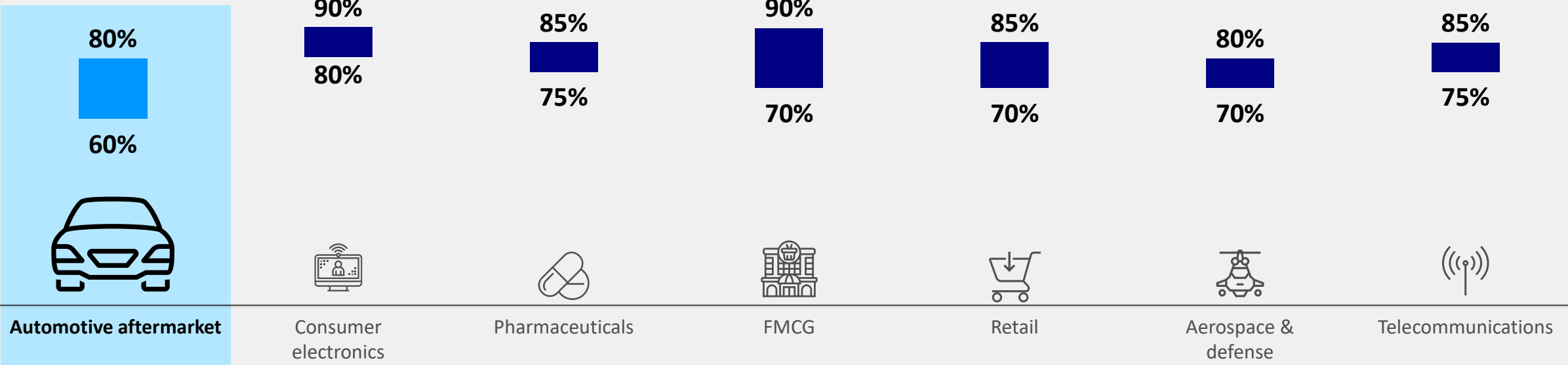


Rising complexity puts immense pressure on aftermarket player – Digitalization can make complexity more manageable and improve performance

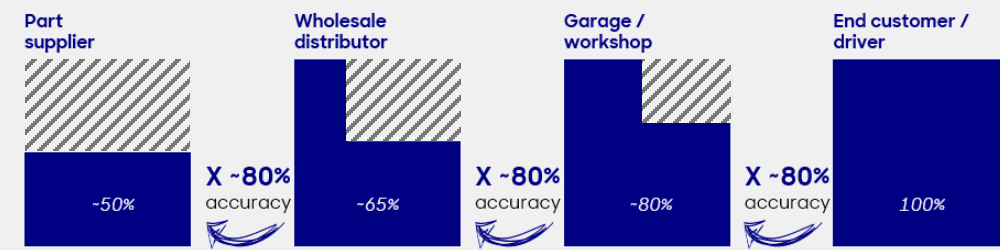


Compared to other industries, forecasting is a special challenge in the automotive aftermarket

Forecasting accuracy across industries



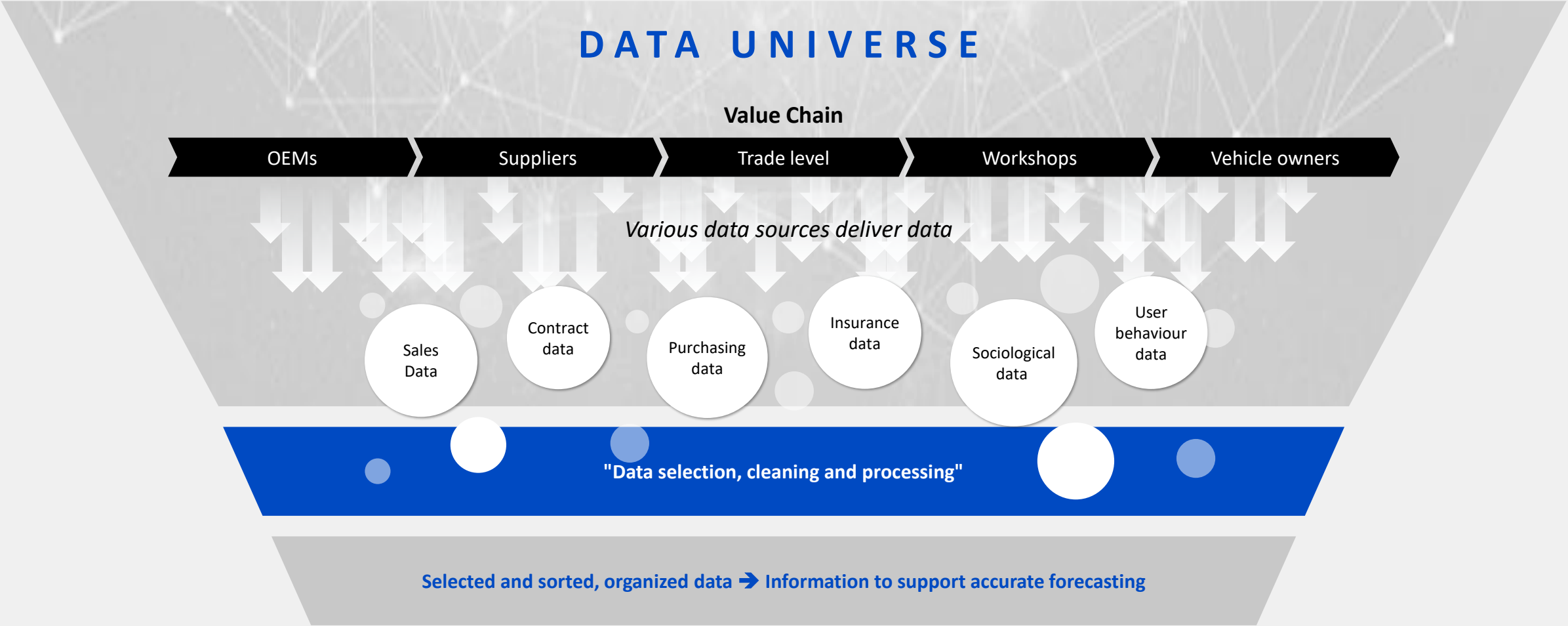
KEY DRIVER:
high variance complexity with bias for availability along the multi-step value chain



Inaccurate forecasting creates significant cost



Data across the value chain and from different sources needs to be utilized to address the forecasting issue



Digitalized forecasting assists in data selection, cleaning and processing and provides internal and external benefits



Improved operational efficiency

Better financial performance & planning

Reduced stress on the organization

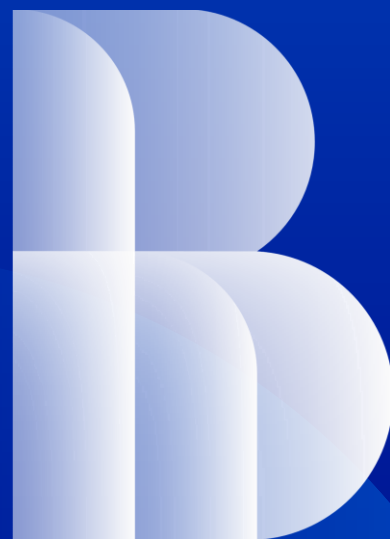
Internal benefits

External benefits

Stronger sales performance

Higher customer satisfaction & loyalty

Improved relation with suppliers



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