

Automotive Aftermarket Pulse

The Big Squeeze: How cost pressures are driving change in the automotive aftermarket



Management summary

Vehicle sales volumes remain stalled in most markets, still below pre-2020 levels. The transition to battery electric vehicles (BEV) is slower than, and the race for leadership in software-defined vehicles continue. Aggressive trade policies have disrupted global supply chains and added a new level of uncertainty. Across the automotive world, most segments are under tremendous strain - except for the aftermarket.

As sales of new cars fell in many markets and average vehicle age rose, demand and cost for repairs and maintenance has grown, spurring opportunities in service and replacement parts. However, 2025 indicates that the exceptional development of recent years may not continue forever. While the underlying support of the continuous rise in the age of the global car parc will remain, consumers (both B2B and B2C) are showing increased price sensitivity. Rising repair costs are driving demand for lower-cost parts and online distributors.

To understand these challenges better, we conducted a survey of 600 garages/workshops and 6,000 private car owners in 13 of the world's most important automotive markets: Belgium, Brazil, Canada, China, France, Germany, Italy, Mexico, Netherlands, Spain, Turkey, UK, and USA.

Most of the results confirmed our hypotheses. Independent repair shops are gaining market share. B2B online parts purchases are expanding, driven by cost-conscious repair shops. Many workshops are trying to expand their expertise in BEV and ADAS repairs. Additionally, we also found one surprising trend: the growing promise urban garages now see in convenience as a differentiator. To set themselves apart, many shops now see such services as pick-up and delivery as a low-cost, low-tech way to stand out.

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Fast facts

57 %

of consumers now prefer IAM parts over OE brands

47 %

of workshops had to turn down ADAS-related repairs due to insufficient capabilities

1

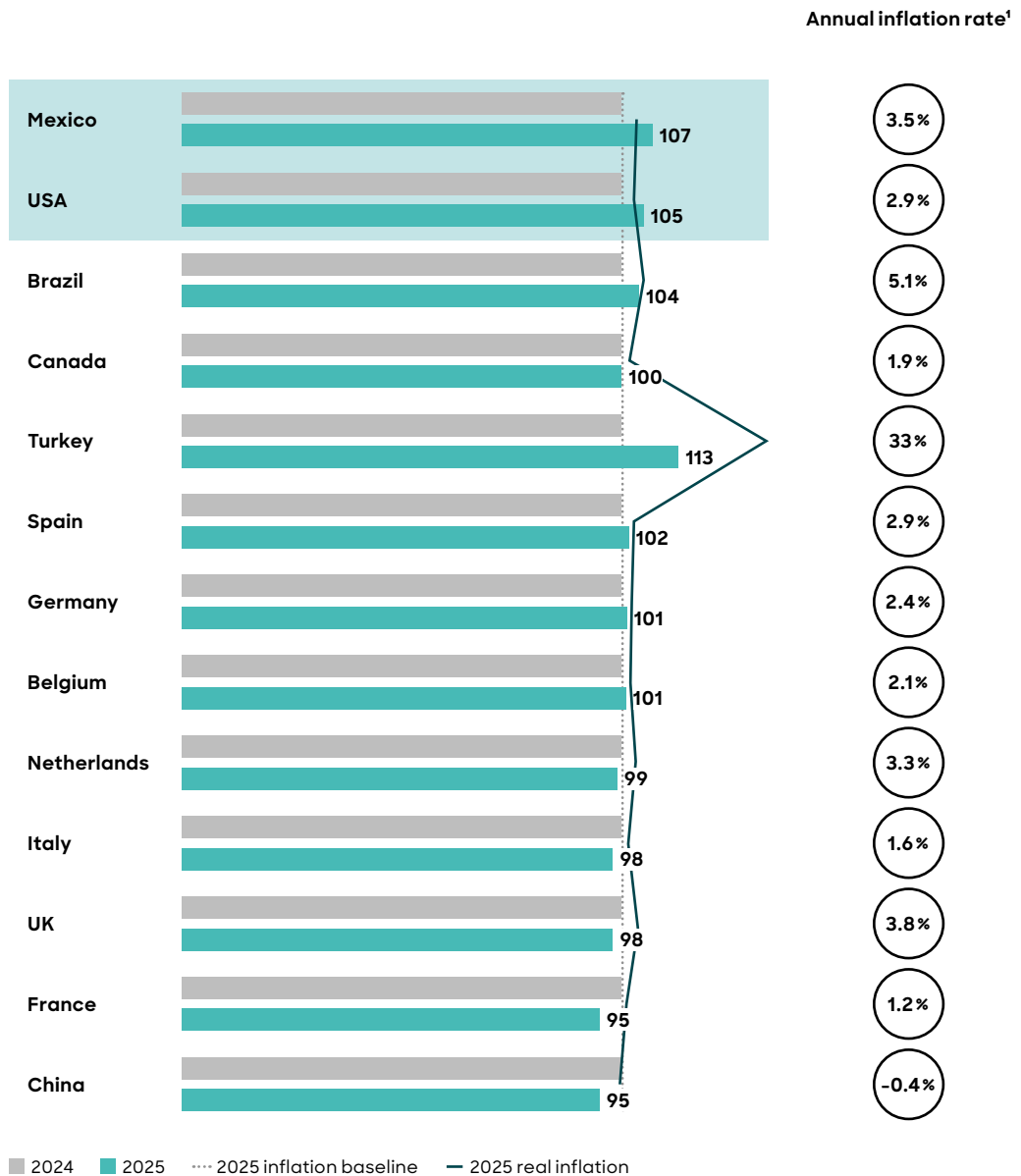
Taking the pulse of the global aftermarket

1.1/ Spending behavior in 2025

Consumers in most countries spent less in real terms on service, maintenance, and repair in 2025 than in 2024, driven in part by pressure on disposable income. Feeling squeezed, consumers are deferring maintenance or trading down to lower-cost service options. ▶ **A**

The only markets where service, maintenance, and repair spending increased were the United States and Mexico, potentially influenced by tariff-related price increases.

A Spend on service, maintenance and repair has decreased in real terms in most markets [index 2024=100]



¹ Based on latest available data, usually Aug/Sep 2025

Source: International Monetary Fund

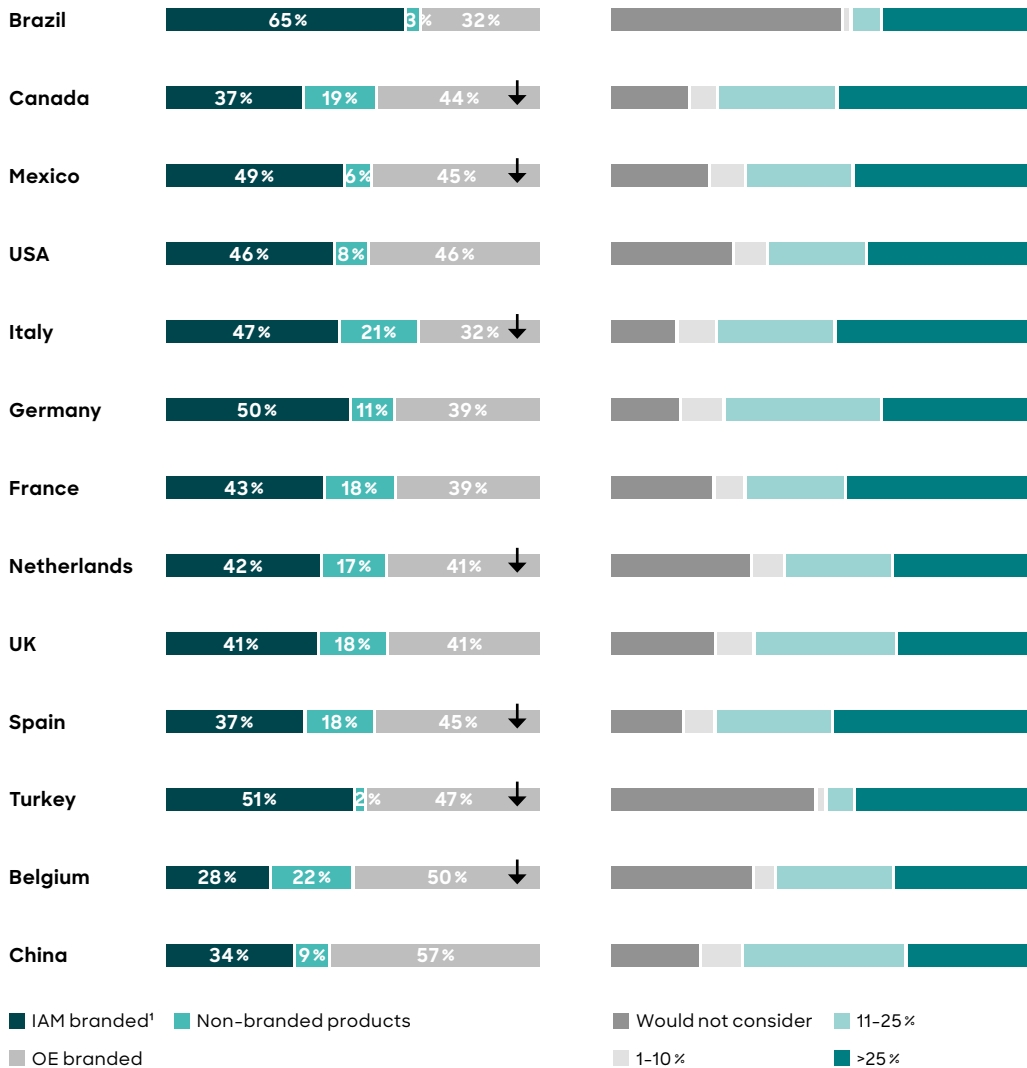
1.2/ Brand preferences

Consumer preference for Original Equipment (OE) brands decreased in most countries in 2025, as aging vehicle fleets, greater acceptance of lower quality-tier parts, and pressure on disposable incomes influenced purchasing decisions. While Independent Aftermarket (IAM) brands have gained popularity, especially among cost-sensitive consumers, most people still require a discount of more than 10% to consider switching from OE to non-branded parts. The extent of this shift varies by country. ▶ B

B In 2025, consumers have adjusted their parts choice to lower-quality tiers in most markets [% of respondents]

With equivalent product characteristics, which brand categories of spare parts would you naturally choose?

What difference in price would prompt you to choose a non-brand name for spare parts?



¹ Includes tier-1 supplier brands and store/distributor private-label brands

Source: Roland Berger

Globally, consumer preference for Independent Aftermarket (IAM) branded parts has risen by 14% since 2024. Today, 57% of respondents choose IAM over OE branded parts. Within IAM, the share of store/distributor private-label brands has increased significantly, up 12% year on year. In 9 out of the 13 countries surveyed, private label parts now make up 25-50% of consumer preference with the highest penetration in North America and the Big 5 European countries.

The shift toward lower quality tiers is most pronounced among rural consumers and drivers of entry-level vehicles. Rural consumers are now more likely to choose IAM or non-branded parts (around 77% combined). For volume and premium vehicles, IAM parts continue to benefit most from declining owner loyalty to OEM parts as vehicles age. In rural areas, consumers now buy 18% generic parts, a trend driven by the greater likelihood that they are driving older vehicles and are more cost sensitive. ▶ C

However, even as rural consumers switch to more affordable parts, rural workshops tend to stick with branded parts, likely due to brand loyalty and a focus on reliability. For suppliers and distributors, this creates an opportunity to help workshops adjust their ordering to better reflect local demand. Interestingly, in urban garages non-branded parts are most common (64%), perhaps due to a higher focus on purchasing cost. ▶ D

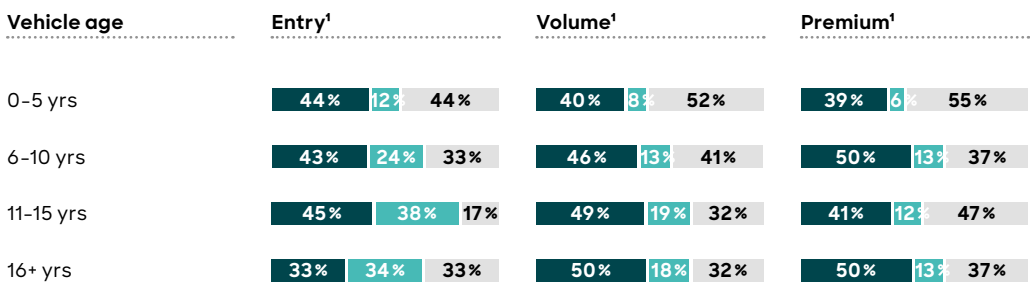
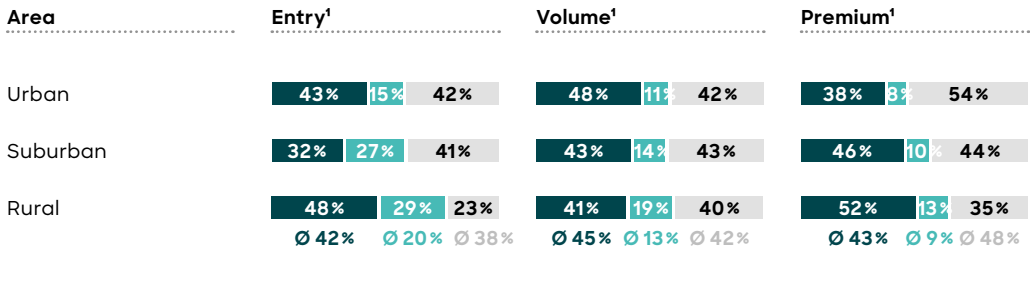
Repair shops in all markets have increased installation of non-branded parts, reflecting consumer trade-down trends. This shift is driven by rising customer price sensitivity and is expected to continue over the next 2-3 years. Growth is especially strong in China and Southern Europe (e.g., Italy, Spain, Turkey), while adoption in Western Europe and Canada remains more moderate. In several wealthier countries, however, some workshops cited higher margins as their reason for buying non-branded parts. ▶ E

“ This year, we found that while independent workshops are trading down in part quality, they are trading up in convenience services to attract new customer segments, such as fleets.”

Neury Freitas, Partner

C The quality-tier shift is most pronounced among consumers in rural areas and drivers of entry-level vehicles.

With equivalent product characteristics, which brand categories of spare parts would you naturally choose? [% of respondents]



■ IAM branded² ■ Non-branded products ■ OE branded

1 Based on S&P Mobility classification

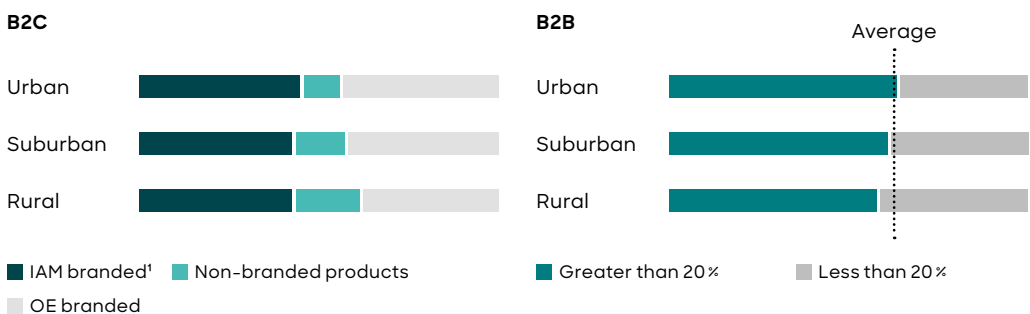
2 Includes tier-1 supplier brands and store/distributor private-label brands

Source: Roland Berger

D Rural consumers are now more open to affordable car parts, but rural workshops have not kept up. Urban workshops, meanwhile, have already switched to more affordable parts.

With equivalent product characteristics (similar safety and quality standards), which brand categories of spare parts would you naturally choose? [% of respondents]

What is the share of non-branded spare parts that you install in vehicles? [% of respondents]

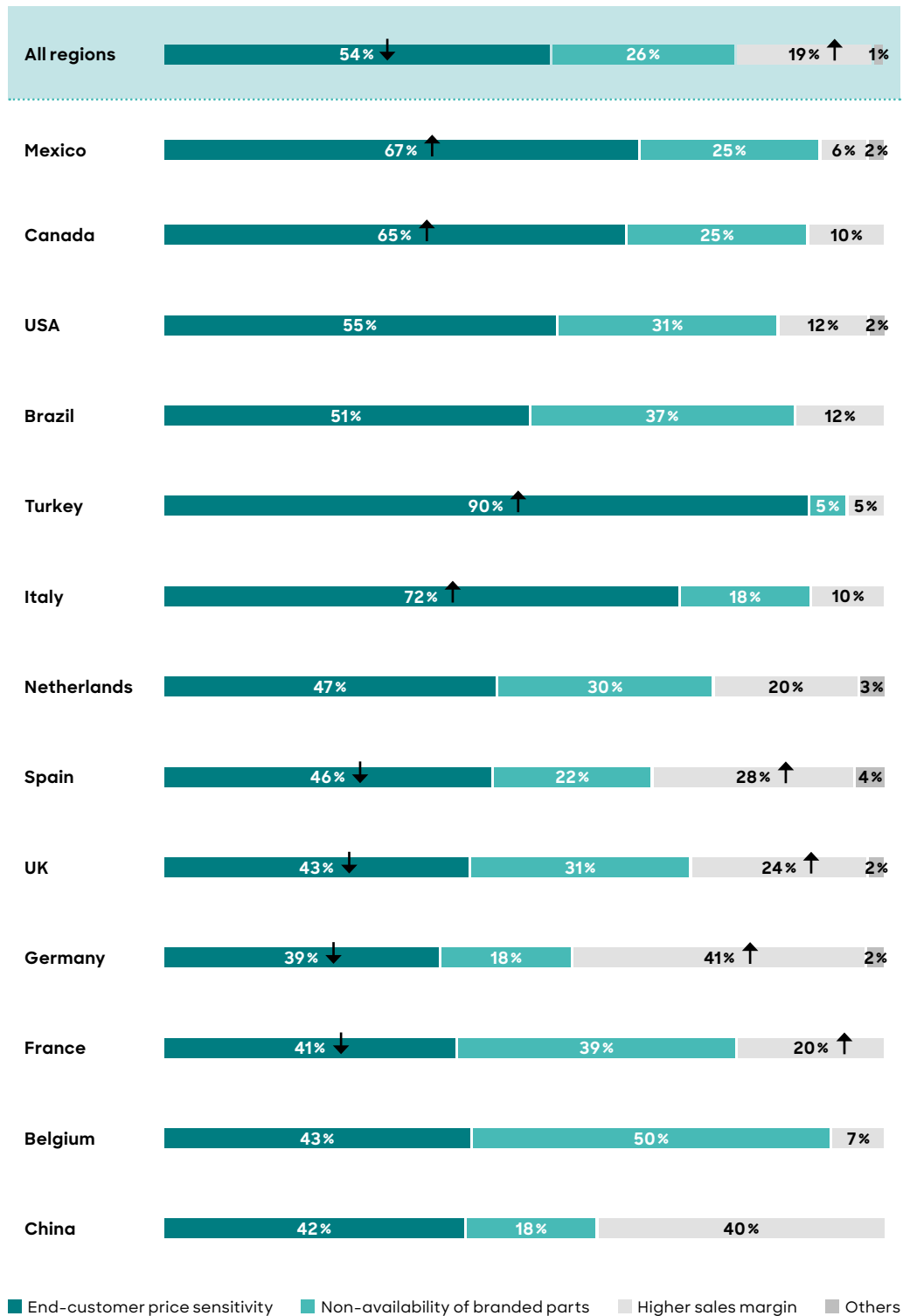


1 Includes tier-1 supplier brands and store/distributor private-label brands

Source: Roland Berger

E Workshops adapt purchasing behaviour based on end-customer price sensitivity and, increasingly, to increase margins

What is the main reason why you may be led to install non-branded parts?
[% of respondents who install non-branded parts]



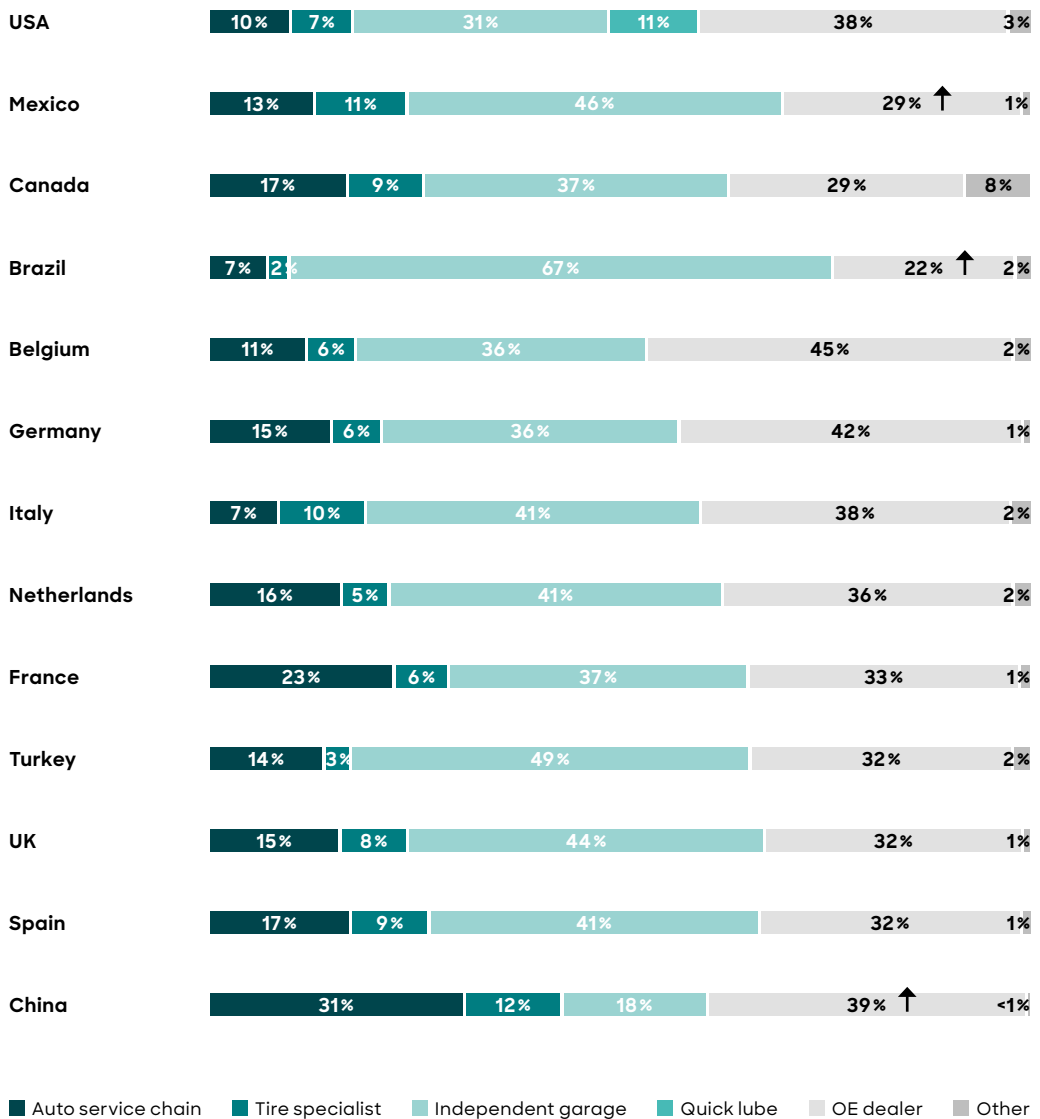
Source: Roland Berger

1.3/ Channel preferences

Service channel preference has continued to slightly shift towards IAM, manifesting the IAM's long-standing roughly two-thirds' market share (66%) in 2025. Consumers continue to rely on auto service chains, tire specialists, independent/family-run garages, and quick lube shops at similar levels as they did in 2024. OE channel grew slightly in preference in China, Brazil and Mexico. The US is an exception, and continues to support broader channel diversity. For instance, the quick lube share of service centers stands at 11%. ▶ F

F Independent shops dominate consumer preference in most regions

Where do you as a vehicle owner take your vehicle for servicing, maintenance or repairs? [% of respondents]



Source: Roland Berger

Auto service chains and tire specialists are especially popular for newer vehicles, likely due to large fleet agreements and a generally better customer experience. As vehicles age, however, owners increasingly turn to independent garages for service and repairs. After 10 years, preference for Original Equipment (OE) channels drops below 30%. Independent garages benefit most from this shift, thanks to their lower costs and broader presence, particularly in rural areas.

1.4/ B2C online/offline preference

Online parts sellers have lost momentum with consumers this year. Since 2024, the share of customers buying parts online has dropped from 56% to 51%, while the share of online buyers unwilling to purchase again has climbed from 20% to 25% representing 13% of all surveyed consumers. Lower prices remain the main draw, but concerns about liability and perception of better deals elsewhere are holding many consumers back. While one-quarter of consumers rule out buying online, another quarter say they would consider it in the future, highlighting both the challenges and ongoing opportunities for online sellers. ►G

Additionally, consumers' trust in workshops is the top reason for those avoiding online purchases. To win hesitant buyers, sellers must bridge this trust gap by offering stronger guarantees, warranties, and forming service partnerships with trusted workshops, alongside to providing competitive pricing and convenience.

Owners of older vehicles, typically the most price-sensitive segment, are more likely to buy online because they face more frequent repairs and seek cost savings options. Urban consumers also lean toward online purchases, likely due to greater familiarity with e-commerce.

Among those who purchase parts online, nearly half now opt for professional installation; a trend that is accelerating in Europe, where the share has increased by 4-8 percentage points since 2024. In Mexico, 63% of online buyers opt for professional installation, in marked contrast to the Netherlands, where 68% still like to do it themselves. This shift suggests growing demand for installation services, especially for complex parts.

For now, easy-to-install parts dominate online orders. Self-installation remains stable at 45-60% across categories, indicating two distinct customer profiles. DIY buyers install even complex parts themselves, while Do-It-For-Me buyers save on parts online but rely on mechanics for installation.

However, on the B2B side, workshops are embracing online purchasing at scale. In markets like the US, Germany, and the UK, many workshops now source more than 20% of their parts online, and most expect volumes to rise over the next two to three years.

While cost is driving the adoption of online ordering, competition is increasingly focused on dependable delivery, smoother purchase support, and flexible payment options. Sales platforms that solve delivery and support workshop pain points will be best positioned to capture more workshop market share. ►H

G Many consumers who tried buying spare parts online say they won't do it again.

Have you ever bought a spare part online for your vehicle?
[% of respondents who purchased online]



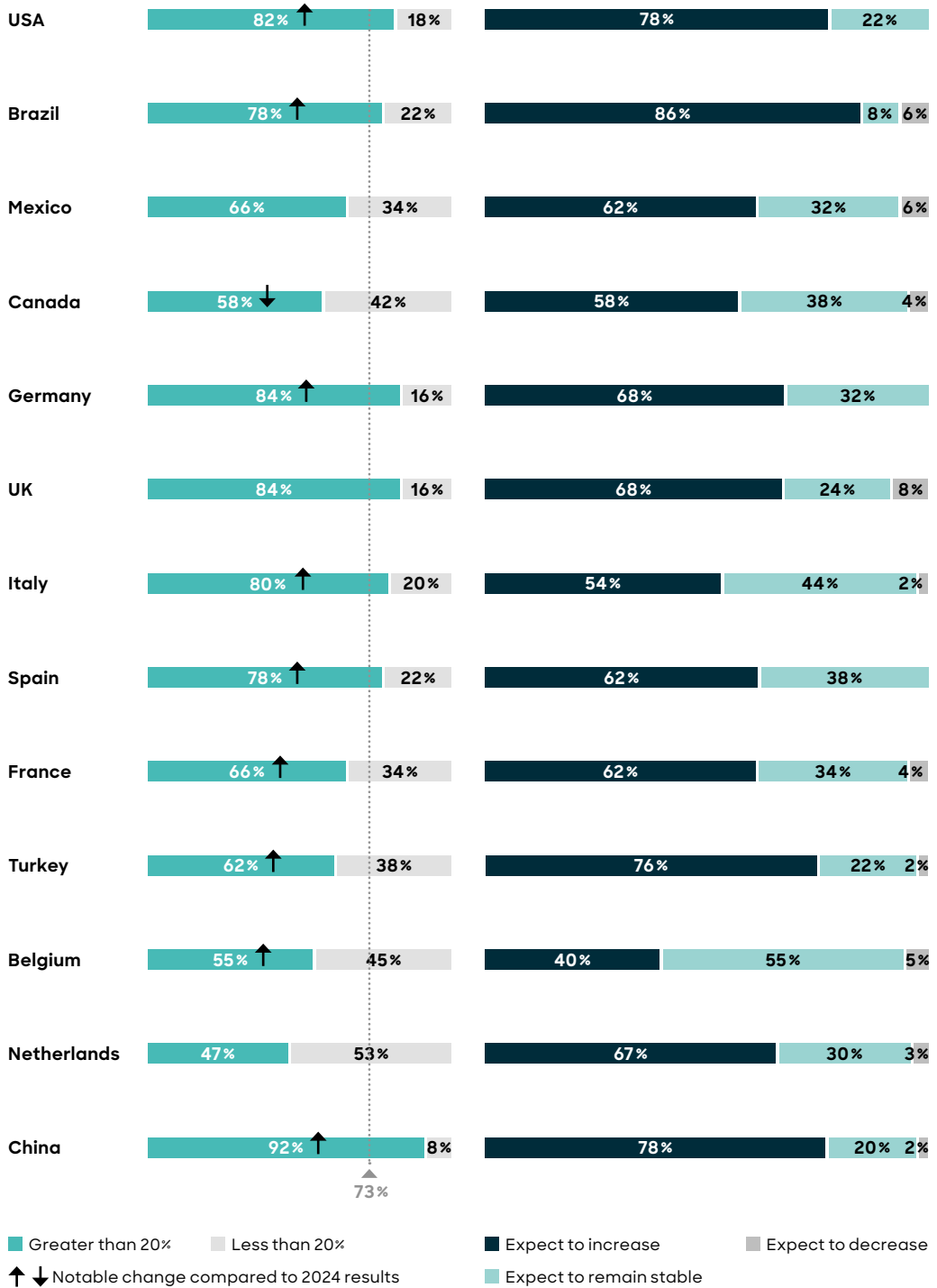
↑ ↓ Notable change compared to 2024 results

Source: Roland Berger

H In the B2B segment, online sales are now mainstream, and the majority of workshops expect further growth.

What share of spare parts does your garage/workshop purchase online (online ordering systems of pure online vendors and of traditional brick & mortar wholesalers)? [% of respondents]

How does your garage/workshop expect its online purchasing to evolve over the next 2-3 years vs. other ordering channels? [% of respondents]



Source: Roland Berger

2

Navigating the transformation

While the aftermarket often feels the impact of changes more gradually, major disruptions are on the horizon. Electrification, digitalization, autonomy, and sustainability are rapidly reshaping the landscape, and aftermarket players must be prepared to support the next generation of vehicles.

2.1/ Electrification

Among battery electric vehicle (BEV) owners, 70% say they now trust IAM workshops for simple repairs, up from 67% in 2024. However, trust drops significantly for complex repairs - only 53% of BEV owners express confidence, compared to 73% for conventional vehicles.

Part of this trust gap can be explained by the youth of the EVs - for vehicles less than 5 years old, trust levels between BEVs and non-BEVs are similar, where 49% of all vehicle owners avoid IAM workshops because of concerns about OEM warranty coverage, although this share has declined since 2024.

Technical know-how remains a concern for EV owners (45% in 2025 up from 40% in 2024), but garages are by investing in EV expertise and infrastructure, signaling that this competence is becoming a table stakes.

Many workshops already have full BEV repair capabilities. Most workshops plan further investment over the next 2-3 years, and the share of workshops with no EV resources at all is declining. ▶ I

2.2/ Digitalization and autonomy

Consumers across most markets are now willing to share vehicle data. Hesitation is declining, especially among drivers under 44. Chinese consumers are most willing to share their data, followed by consumers in Mexico, Germany and Spain. In Europe, reluctance is fading thanks to a better understanding of the benefits and clearer regulation (such as the EU cybersecurity act). In contrast, US consumers remain evenly split on the issue.

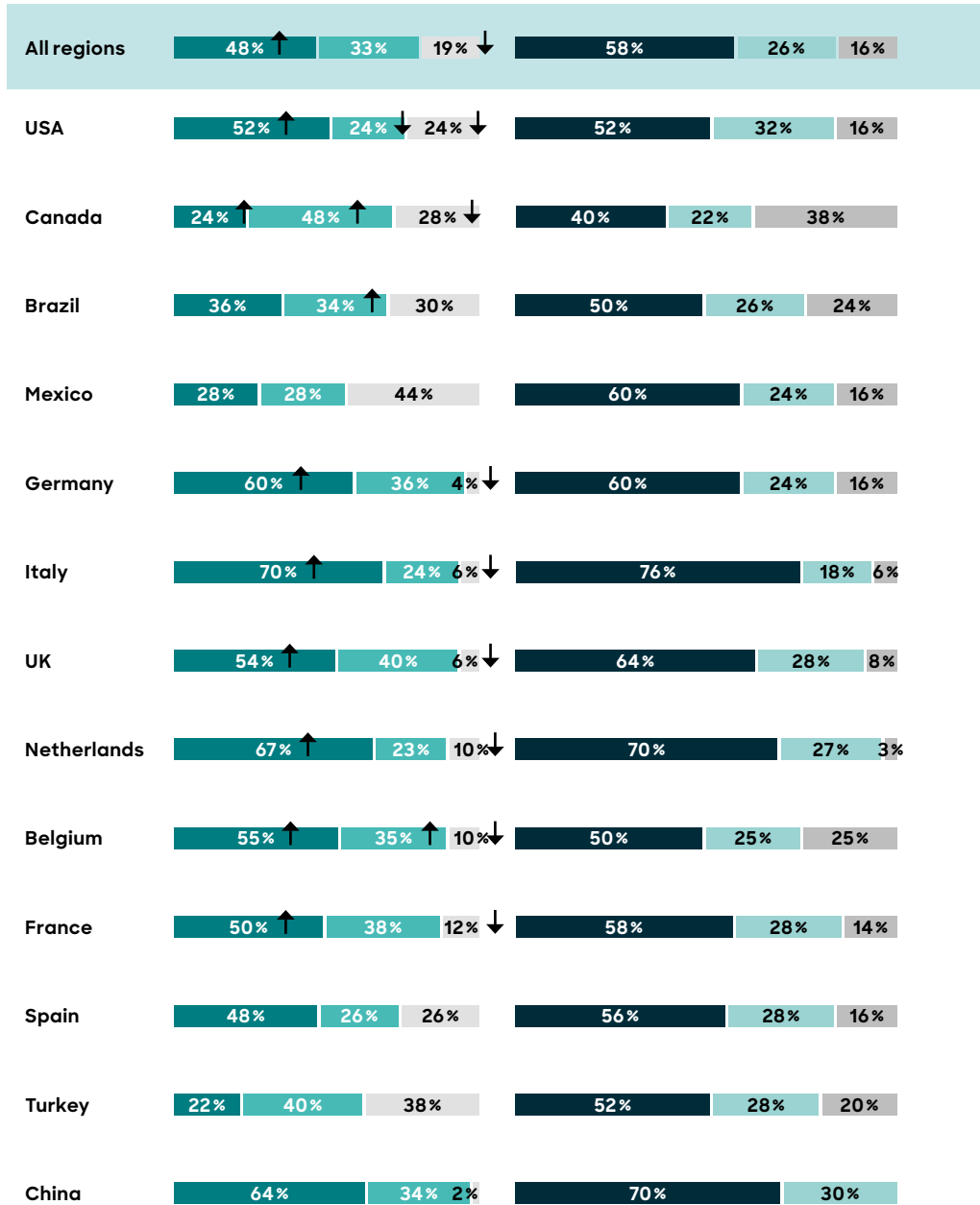
Advanced driver assistance systems (ADAS) repair capabilities are rising. Nearly half of workshops (49%) now offer full ADAS repair services, but 47% report having had to turn down ADAS having had to pass on ADAS-related repairs due to insufficient capabilities. Equipment shortages are the main constraint (58%). The high costs of the servicing equipment could exclude independent workshops from this future revenue stream, concentrating revenue and customer loyalty in OE-controlled channels, or forcing them to share profits with ADAS specialists.

Germany, Italy and the Netherlands look set to expand their ADAS service offering in the next 2-3 years, while Canada, Turkey, and Brazil show hesitation. This could create a credibility gap in some markets if ADAS-equipped vehicles go mainstream faster than workshop investment. ▶ J

I Workshops are investing in EV readiness

How comfortable are you dealing with Battery Electric Vehicles (BEV)?
[% of respondents]

Does your garage/workshop plan on expanding EV capabilities over the next 2-3 years to cover all clients' needs?
[% of respondents]



- We have full capabilities and can deal with all types of EV repairs
- We offer only basic maintenance and or non-EV specific repairs
- We don't have resources and / or capabilities to deal with electric vehicles
- Yes, we plan to have full capabilities to deal with all types of EV repairs
- Yes, we will offer basic maintenance for EVs and non-EV specific repairs
- No, we do not plan on investing in EV over the next 2-3 years

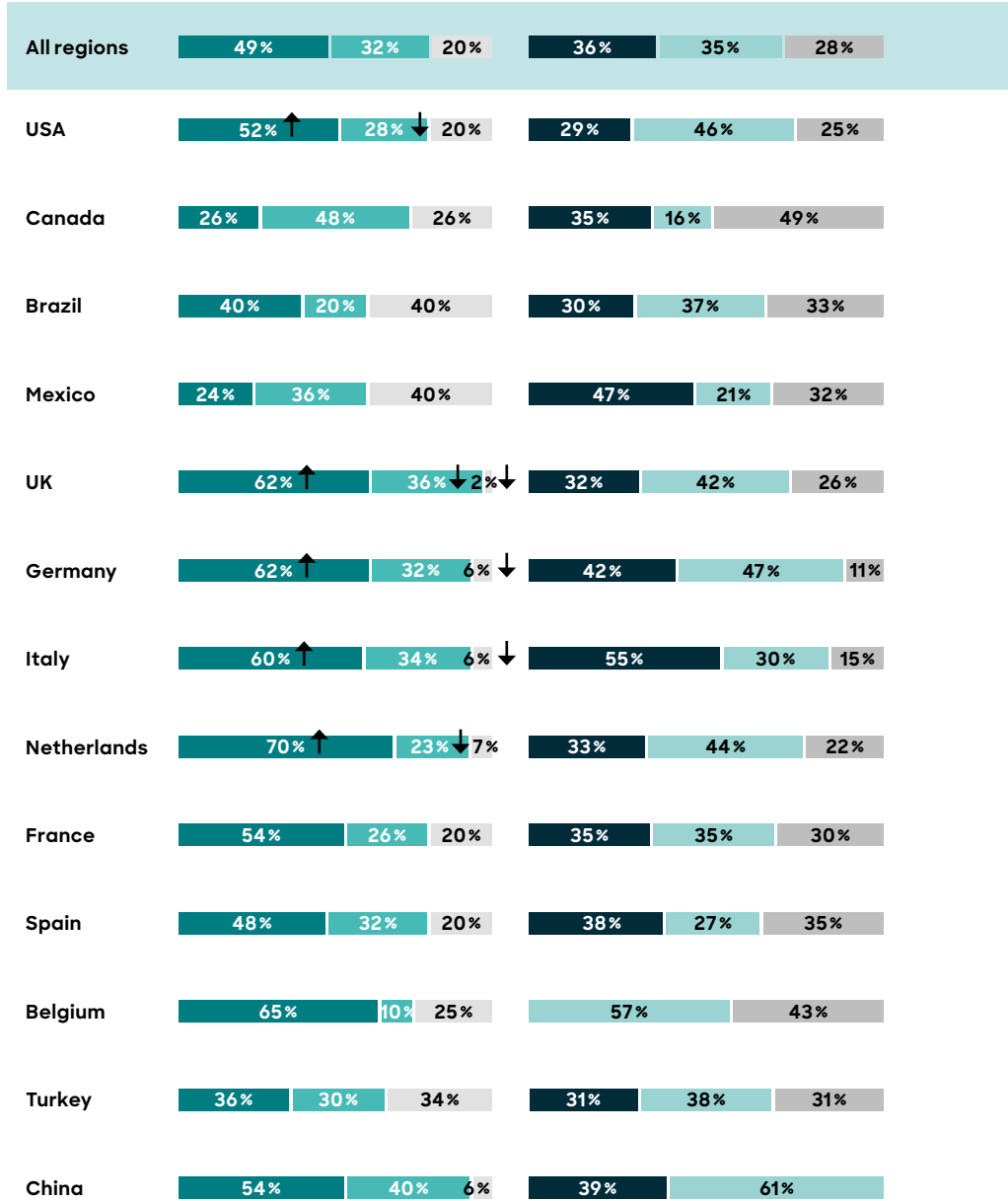
↑ ↓ Notable change compared to 2024 results

Source: Roland Berger

J ADAS repair capabilities are expanding, but future investment intent is uneven. Many garages remain hesitant to commit fully.

How comfortable is your garage/workshop with the replacement of parts related to Advanced Driver-Assistance Systems (ADAS) (e.g., exchange of sensors, radars, LiDARs, cameras)? [%]

Does your garage/workshop plan on expanding ADAS capabilities over the next 2-3 years to cover all clients' needs? [% of respondents]



- We have full capabilities and can deal with all sorts of calibrations and troubleshooting
 - We offer repair of components with ADAS sensors (e.g. bumpers with radar or cameras integrated), but have no ADAS sensor calibration capabilities
 - We cannot repair any component that contains sensors of the ADAS system
 - Yes, we are planning to be fully ADAS-ready within 2-3 years
 - Yes, we will expand our ADAS sensors component repairs, but we will not have ADAS sensor calibration capabilities within 2-3 years
 - No, we do not plan on investing in ADAS over the next 2-3 years
- ↑ ↓ Notable change compared to 2024 results

Source: Roland Berger

2.3/ Sustainability

Most consumers express a willingness to buy more sustainable parts. However, concerns about safety, durability, and especially price remain key barriers. Price is perhaps the most significant barrier to winning over consumers: worldwide, 72% of consumers say they would not pay a premium for sustainable part.

While most B2B-focused workshops also express interest in sustainable parts (63%), a significant minority remain neutral or resistant (37%). Interest is highest in China, while in EMEA it is largely driven by EU regulations and customer expectations. In the US, enthusiasm has cooled, with interest dropping to 59% from 77% last year.

Remanufactured parts that combine cost competitiveness with sustainability seem best positioned to capture mainstream demand. Suppliers and workshops should align consumer interest with remanufactured parts that address cost and some of the trust barriers.

3

Five trends to watch

Our survey confirms that there are five key trends in the automotive aftermarket that industry players should watch closely this year.

PRICE PRESSURE ACCELERATES THE SHIFT TOWARD NON-BRANDED PARTS.

As consumers feel increasing financial pressure, they are becoming more receptive to private label and non-branded alternatives. IAM parts are now favored by 57% of respondents globally, a 14 percentage point increase from 2024. Retail and distributor brands are especially strong in cost-sensitive rural and entry-level segments. Workshops reflect this trend as well: in Mexico and Turkey, over 70% proactively recommend generic parts, while adoption in EMEA has surpassed 50%. To retain share, branded suppliers must offer credible value-tier products and tailor their offerings to local preferences and brand perceptions.

INDEPENDENT REPAIR SHOPS SEE GROWTH DIFFERENCES BASED ON REGION.

The trend is strongest in the US and Brazil, where independents dominate. In China, meanwhile, the OE share is growing. For suppliers and distributors, these regional differences require a tailored approach: focus on price-sensitive IAM positioning in the Americas, while pursuing premium partnerships in Asia.

ONLINE PURCHASING IS EXPANDING, ESPECIALLY IN B2B.

More than half of consumers across the 13 countries have purchased automotive parts online – a figure that has remained stable since last year – but enthusiasm is waning: one in four buyers now say they would not use the channel again. In contrast, the B2B market is seeing robust growth: over 60% of workshops in mature markets (US, Germany, UK) already source significant volumes online, and most expect this share to increase further. To succeed, online sellers must ensure they are ready for continued B2B growth and adapt early to evolving market standards. Offering the lowest prices is no longer sufficient; reliable delivery, strong customer support, and flexible payment options are becoming decisive differentiators.

ELECTRIFICATION AND ADAS DEMAND DEDICATED CAPABILITIES.

The majority of workshops can now handle basic BEV maintenance and many plan to offer full-service coverage within 2-3 years. ADAS capability lags, however, with nearly half of all workshops having had to pass on ADAS repair requests in the past year, citing equipment costs and knowledge gaps.

Suppliers and distributors have a window of opportunity to provide the tools, training, and support needed to lock in workshop loyalty.

INTEREST IN SUSTAINABILITY IS STRONG BUT HAS TO COME AT AN ATTRACTIVE PRICE.

In most markets, consumers and workshops are increasingly willing to use sustainable parts. Interest is highest in China and EMEA, reflecting regulation and consumer expectations. However, many of these consumers (72%) are unwilling to pay a premium for a greener part. Remanufacturing may be able to resolve this tension, offering both lower cost and a material environmental benefit.

4

Smooth operators: convenience as a differentiator

With price mostly exhausted as a differentiator, convenience is emerging as the key theme for 2025 and beyond.

The aftermarket is being redefined by workshops introducing new convenience-focused services for customers. These range from pick-up and drop-off options to premium "ghost services," where a vehicle is collected, repaired, and returned without the owner needing to visit the garage.

Unlike other automotive innovations, these convenience features rely less on technology and more on a customer-centric approach that extends beyond traditional maintenance and repair. Earlier, workshops saw no need to offer such services, lacked the processes to deliver them seamlessly, and faced limited customer demand. Now, workshops see convenience as a key differentiator and a way to attract new customer groups, such as fleets that might otherwise use alternative channels.

Urban workshops are leaders in providing such convenience services, which makes sense given rural price sensitivity and higher distances and travel time.

Regionally, EMEA is leading, particularly with pick-up, drop-off and pre-booking. In the Americas, pick-up/drop-off services are also catching on. China is particularly open to newer services such as ghost services (28%) and mobile services (26%). ▶K

There is a lot of potential to develop such services: over 40% of workshops surveyed have yet to make convenience a priority. In China, despite the enthusiasm, staffing challenges and

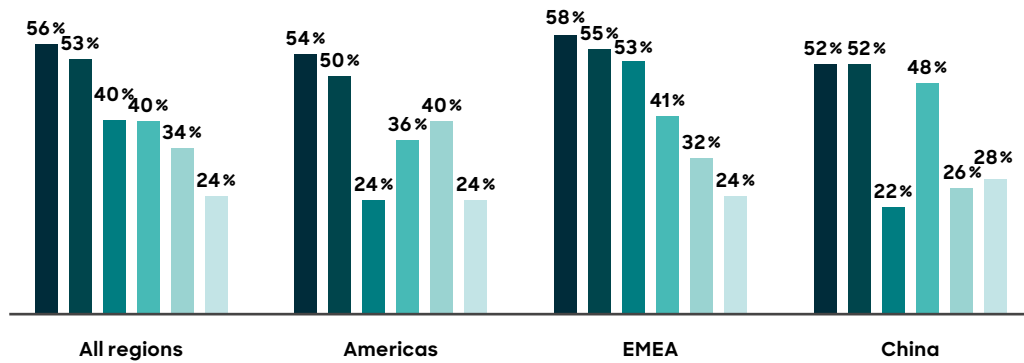
space constraints are holding back more convenience offerings.

Moving forward, improved marketing and addressing process challenges are both likely to spark further adoption of convenience-focused services. This will be an opportunity for the IAM to reach new customer segments and narrow the experience gap with OE services.

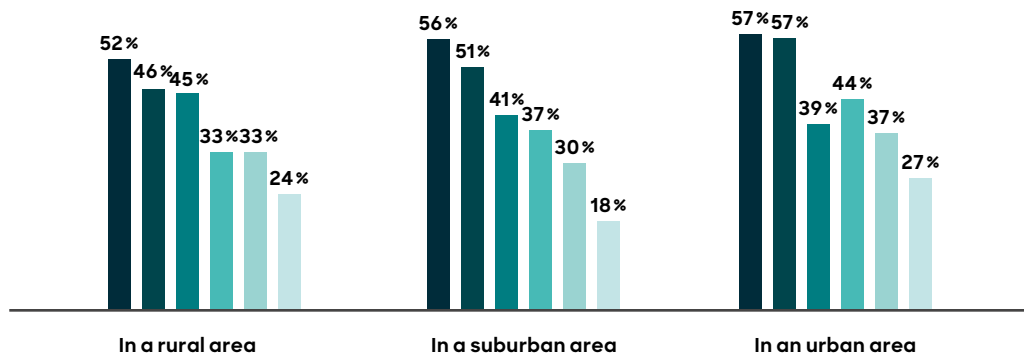
K Convenience services are set to expand in the next three years, with adoption strongest in Europe and in urban markets.

Do you already offer or have plans to offer services to your customers within the next 3 years? [% of respondents that already offer]

By region



By location



- Vehicle pick-up & drop-off
- Online appointment booking
- Loaner vehicle
- Mobile service
- Shuttle service
- Ghost service

Source: Roland Berger

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Further reading

- [AFTERMARKET PULSE REPORT 2024](#)
- [AFTERMARKET PULSE REPORT 2023](#)
- [CONSOLIDATION IN SOUTHERN EUROPE'S AUTOMOTIVE AFTERMARKET](#)



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