



China and G5 Automotive Aftermarket overview



27th May 2016

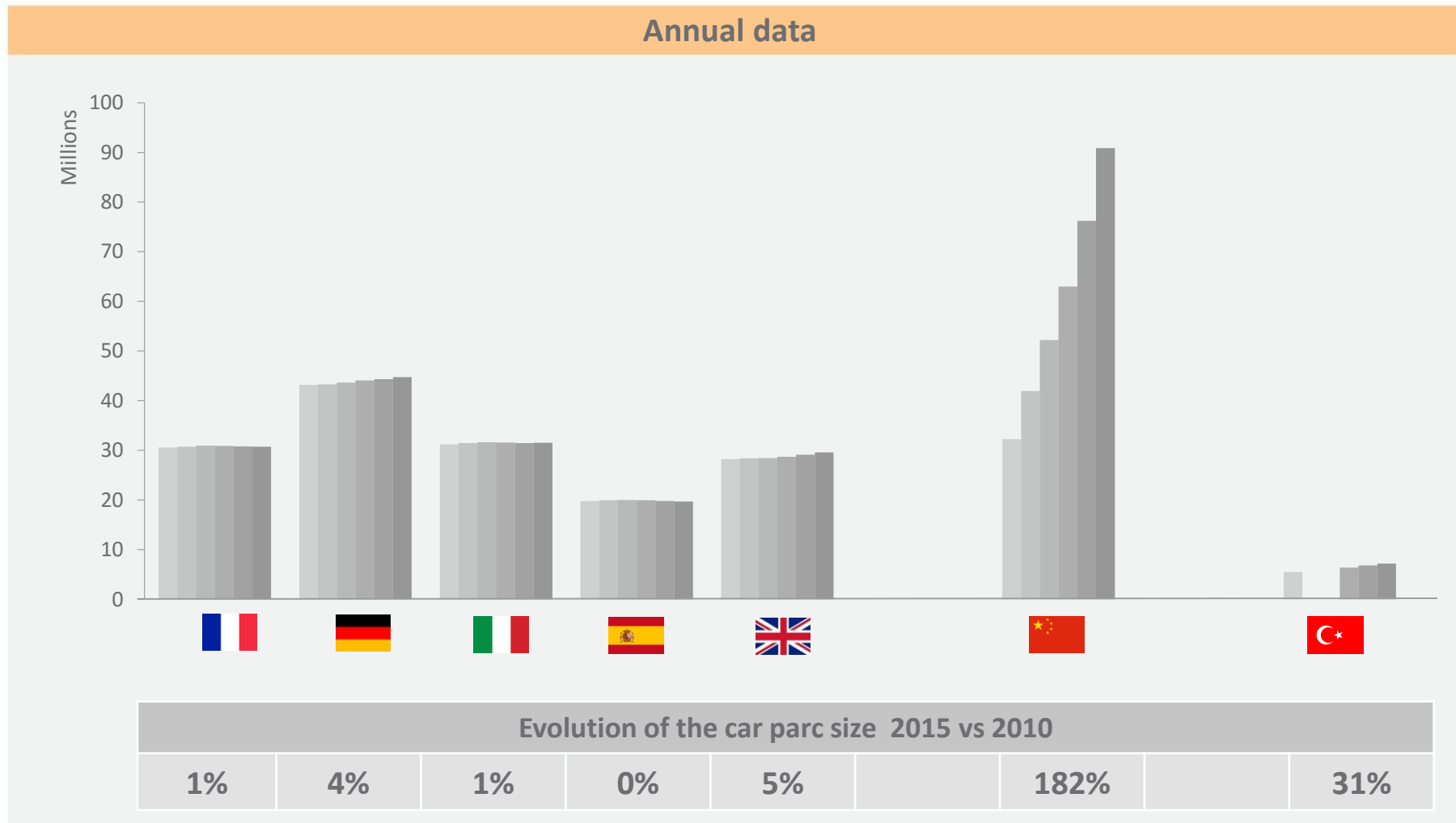


1. Car parc overview

Car parc size overtime 2015 vs 2010



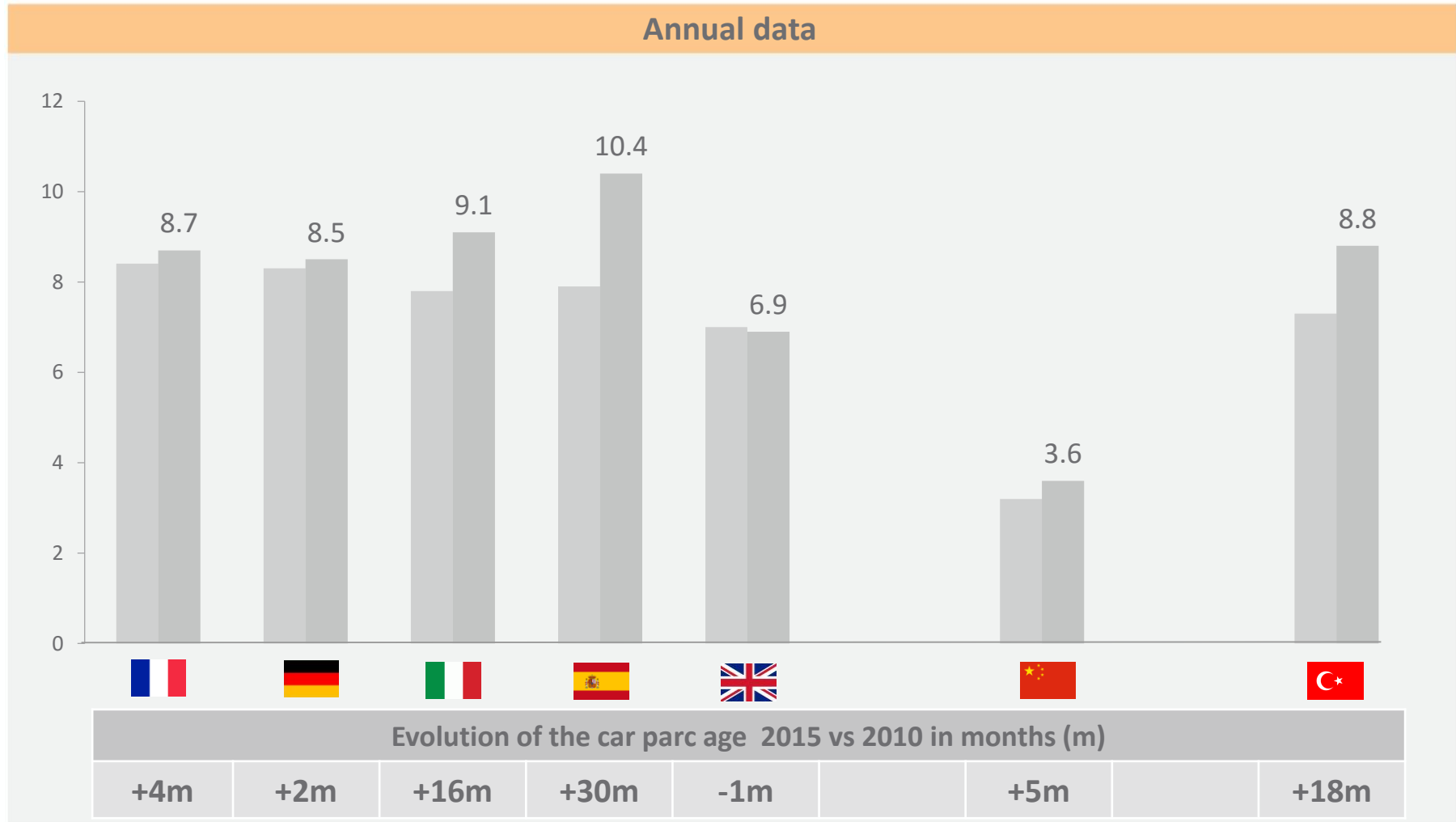
- ➔ G5 is constituted of mature markets.
- ➔ Turkey market is ranked 2nd in terms of growth just behind China.



Car parc age overtime 2015 vs 2010



- ⇒ G5 average age of the car parc has suffered from the slow down of new registration after 2008.
- ⇒ More reliable car within China and Turkey made the car parc aging.



TAYSAD – VIIIth Aftermarket Conference
New challenges for the Aftermarket



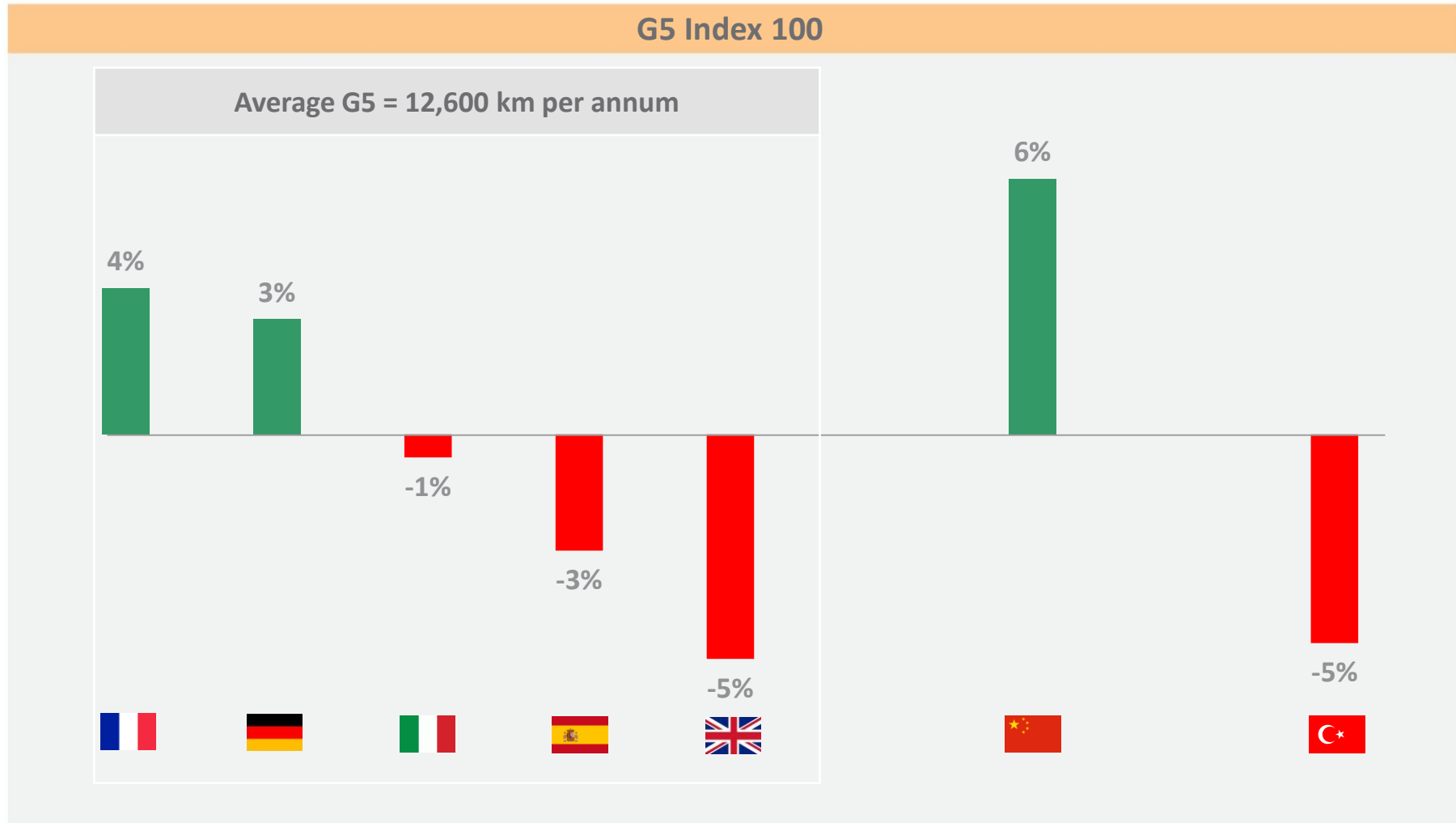


2. Driver behaviour and repairs

Annual kilometre driven



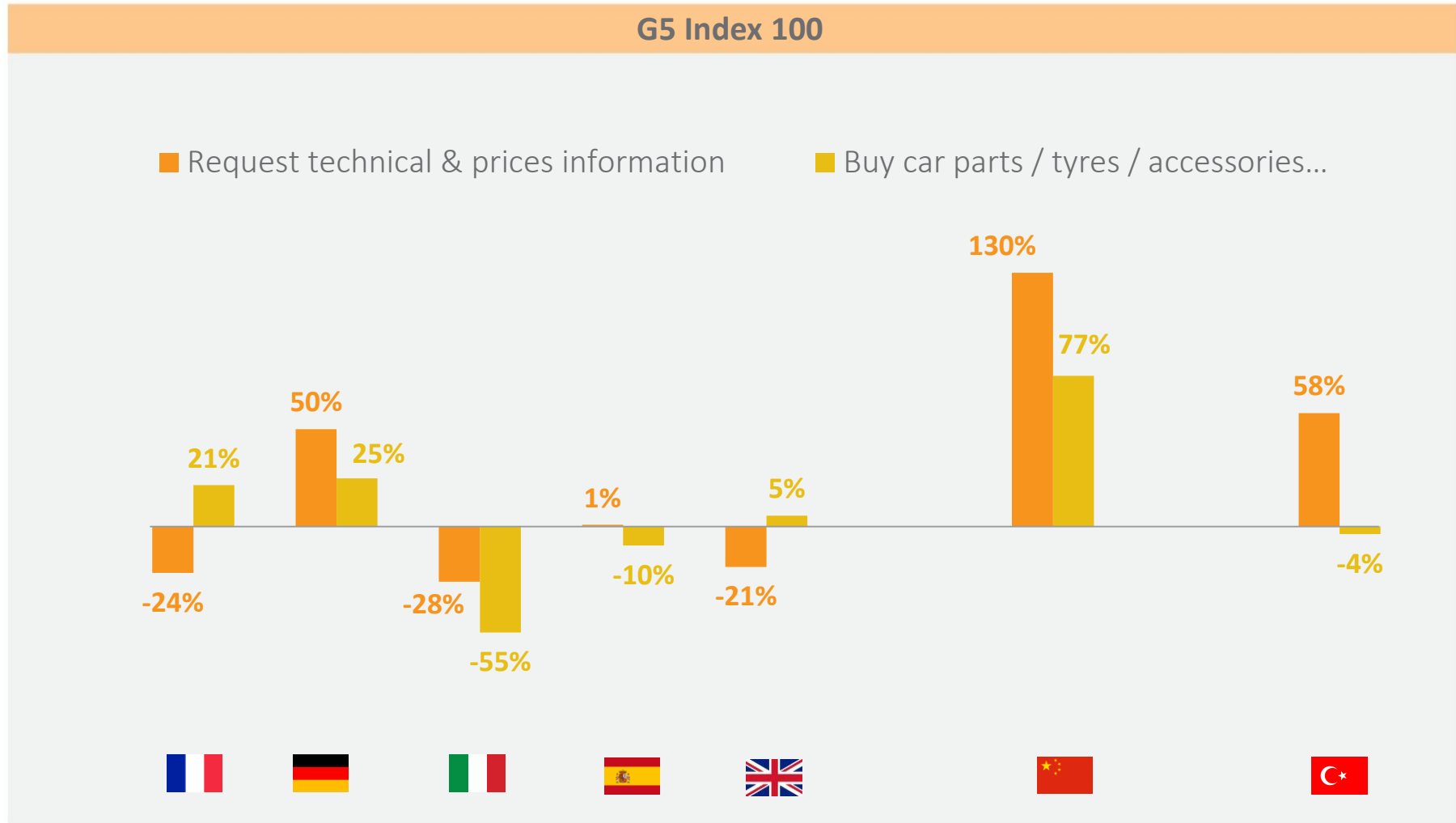
➔ Annual kilometres driven per year has a direct impact on spare parts, maintenance and repair businesses.



Use of the internet



➔ Turkish drivers ranked 2nd for use the internet for getting technical and price information.





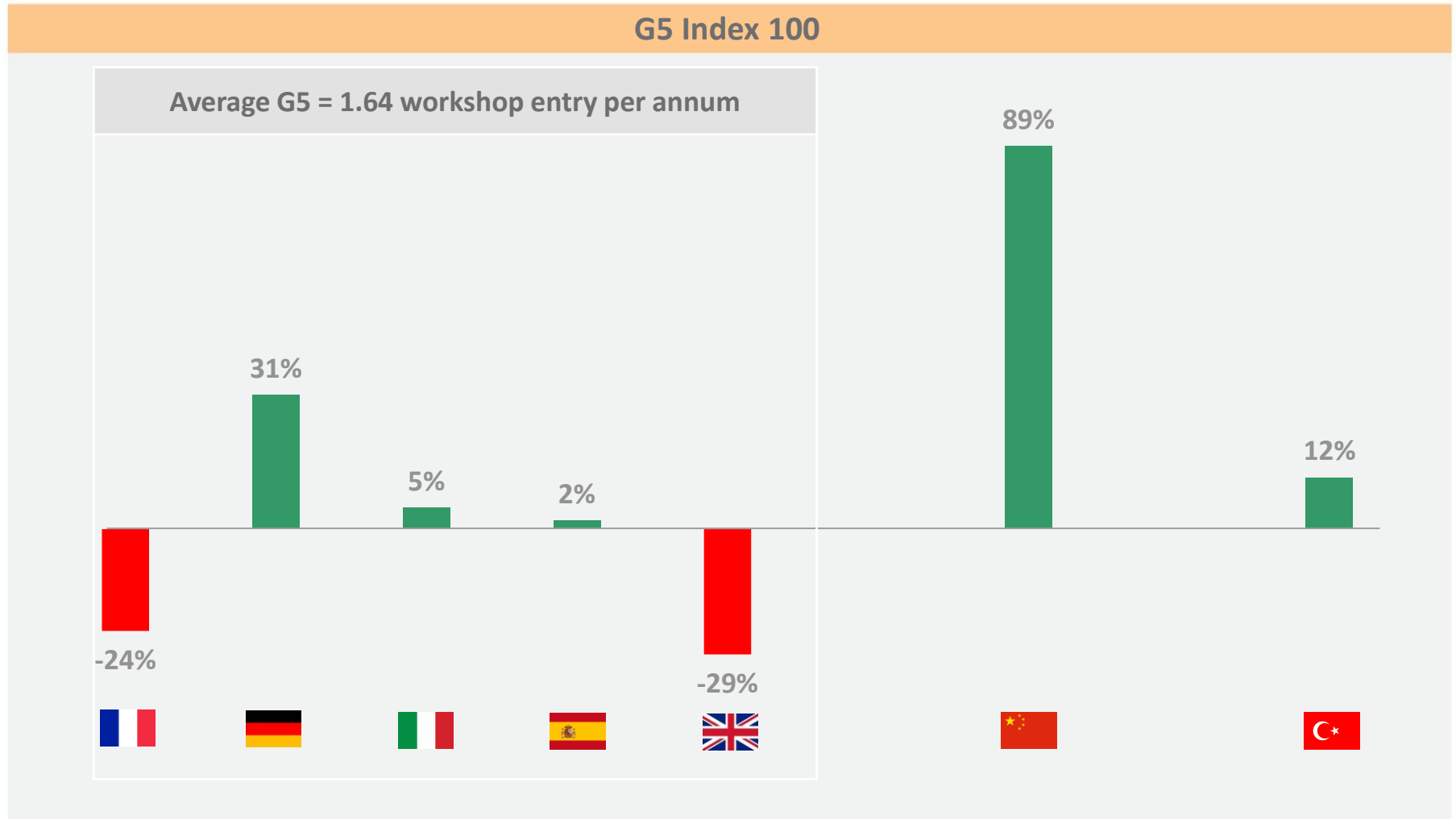


3. Repair market

Number of workshop entry



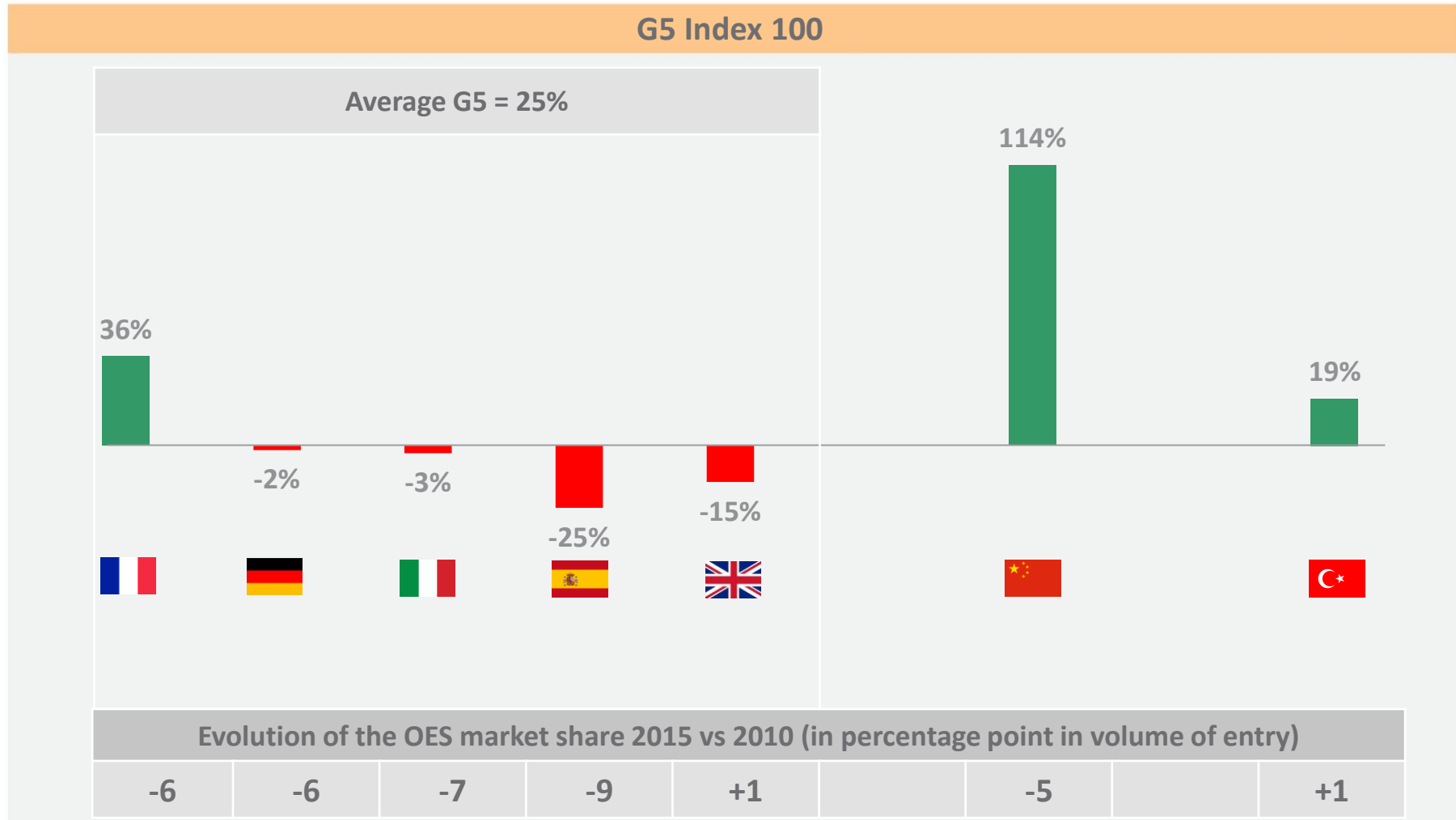
⇒ DIY behaviour is really low in Turkey as well as in China, it boosts workshop entries in comparison to G5 countries.



OES share in volume of workshop entry



⇒ Turkish OES network is ranked 3rd.in terms of workshop entry market share in volume.





Toolbox

Growth drivers

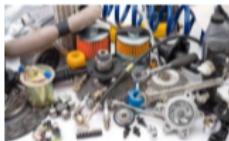
Target



IAM workshop concept



Online parts portal



IAM spare parts offer



Logistic platforms

Multiple channels coverage

Digital strategy

Price control



Details available here → https://www.youtube.com/watch?v=iwB7Q_kKTLQ

6. Key Points



Car Parc

- 💡 **Sustainable growth** of Turkish **car parc** thanks to new registration.
- 💡 A **new landscape** is on its way with **hybrid/ electric vehicles**.



Driver behaviour

- 💡 **Internet traffic** is a **real opportunity** which has to be converted into business somehow. → **O2O strategy**



Repair market

- 💡 A **strong Turkish OES** network which could be influenced by **significant changes** in the future.