



F R O S T & S U L L I V A N

TOP 8 DISRUPTIVE TRENDS IN THE VEHICLE AFTERMARKET

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In 2021, the global automotive aftermarket slowly recovered post-pandemic. As the global economy rebounded, the market sentiment toward the automotive industry increased along with the economy.

However, the global automotive aftermarket has experienced several disruptive market trends.



The increased average age of vehicles globally has driven the demands for the aftermarket.

Due to the shortage of microchips, the global supply of new vehicle has decreased; customers had to hold on to their cars. As a result, overall, the average vehicle age has increased in most countries. For example, the average age of light vehicles in European countries has increased by 0.2–0.4 years in 2021, compared to 2020. In the USA, the average age of cars increased by 0.2 years in 2021. The older vehicle parc demanded higher maintenance, which has driven the aftermarket. However, demands for used cars have increased due to the shortage of new cars. Used car dealers have actively refurbished used cars to supply to the market, which also has contributed to a growth in demand for the aftermarket.



The disruption of the global supply chain has caused a parts shortage and increased costs.

In 2021, due to the shortage of shipping containers and vessels, the rental and buy price increased. The premiums are going straight to the retail price of goods. For automotive aftermarkets, in countries where there are not many parts manufacturers, part prices have seen price hikes and stock shortages. OEM dealers have struggled to order parts and keep profits. The situation extended to 2022 and is estimated to slowly recover but last throughout 2022.



The digitalization of parts retailing is challenging traditional distribution structures.

Automotive parts e-commerce is emerging in many countries, especially in developed economies. Finding parts and comparing prices have historically been major challenges for car owners. Traditionally, this is when many “middlemen,” such as parts outlets and mechanics, come into play to reach customers. Parts e-commerce provides higher accessibility to products, price transparency, and timely availability to customers, which reduces the need for middlemen. Digitalization is expected to continue to grow and potentially make aftermarket distribution leaner.



Overview of the GCC Automotive Aftermarket in 2021

In the post-COVID time, the GDP of the Gulf Cooperation Council (GCC)—comprising Oman, Kuwait, Qatar, Saudi Arabia, United Arab Emirates, and Bahrain—saw a 2.3% rebound in 2021. In 2022, the GCC is forecasted to fasten the pace and grow at 5.1%. With the rebound of the economy, the market sentiment for the automotive market rapidly grew in 2021.

Along with the recovering market sentiments post-pandemic, two major events have been the main growth drivers of vehicle miles traveled (VMT) in the GCC in 2021.

- Increasing women drivers in Saudi Arabia have driven vehicle demand, which also drove the aftermarket.
- The six-month event of EXPO 2020 Dubai (which was postponed to September 2021) attracted millions of tourists visiting Dubai and other emirates, which drove tourism-related VMT in the UAE for light and commercial vehicles.

The VMT growth has led to a surge in demand on the aftermarket; however, the GCC aftermarket also has a major challenge with parts supply delay and increased freights, which stem from the strained global supply chain. There are few car part manufacturers in the GCC. Most car parts, whether original equipment (OE) parts or independent aftermarket (IAM) parts, are imported from Asia, Europe, and the US. Congestions in ports of both export and import countries and in-demand vessel and container rentals have resulted in extended lead times. The lead time to order parts from East Asia has been affected the most, increasing 30% to 60% from 80-90 days (pre-COVID) to 120-150 days. In the meantime, the shipping costs rose by 400% to 500%. The industry expects the situation to last throughout 2022.

The increased landing costs of parts have also led to other spinoffs. Small parts outlets, which are an important pillar in parts distribution in the GCC, suffered to keep customers and margins. Many small parts outlets could not survive the loss of sales in 2020 and the decreased margin due to the high landing costs in 2021 post-pandemic. Others have been seeking support from supplier agents and franchised dealers while trying to maintain customer retention to keep the sales volume.

On the other hand, vehicle service has also been increasingly competitive in the GCC region. As a result of diversifying revenue streams, independent auto dealers have established their own workshops or are partnering with other workshops to expand their business portfolio. In the competitive landscape, workshops are becoming more consumer-focused. They invest in gaining and analyzing market data and studying consumer behaviors and feedback to attract and retain customers.

Every challenge is an opportunity. Challenges are affecting the GCC aftermarket, but they also derive dynamic opportunities for the automotive businesses. This white paper will provide a detailed look at the market and examine the future development.

Update of Regulations Related to the Automotive Industry (2020 – 2022)

Country	Year	Regulation Code	Head
UAE	2020	UAE.S 5041	Fire-suppression systems to be installed in buses
Saudi Arabia	2020	SASO 2944	Technical Requirements for “eCall” Emergency Calls to be installed in the vehicle
Saudi Arabia	2020	SASO 2946	Buses- Requirements of Construction
Saudi Arabia	2021	SASO 2955	Motor Vehicles-Front Underrun Protective Devices for Trucks
Saudi Arabia	2021	SASO 2956	Motor Vehicles-Lateral Underrun Protective Devices for Trucks and Trailers
Saudi Arabia	2021	SASO 2957	Motor vehicles-Rear Under Run Protective Devices for Trucks and Trailers
Saudi Arabia	2021	N/A	SASO issued its first accreditation certificate to an EV OEM
Qatar	2021		Adopting EURO V (The limits of pollutants emitted from motor vehicles with Diesel Engine (models of 2022 and onwards) should comply with Euro V.)

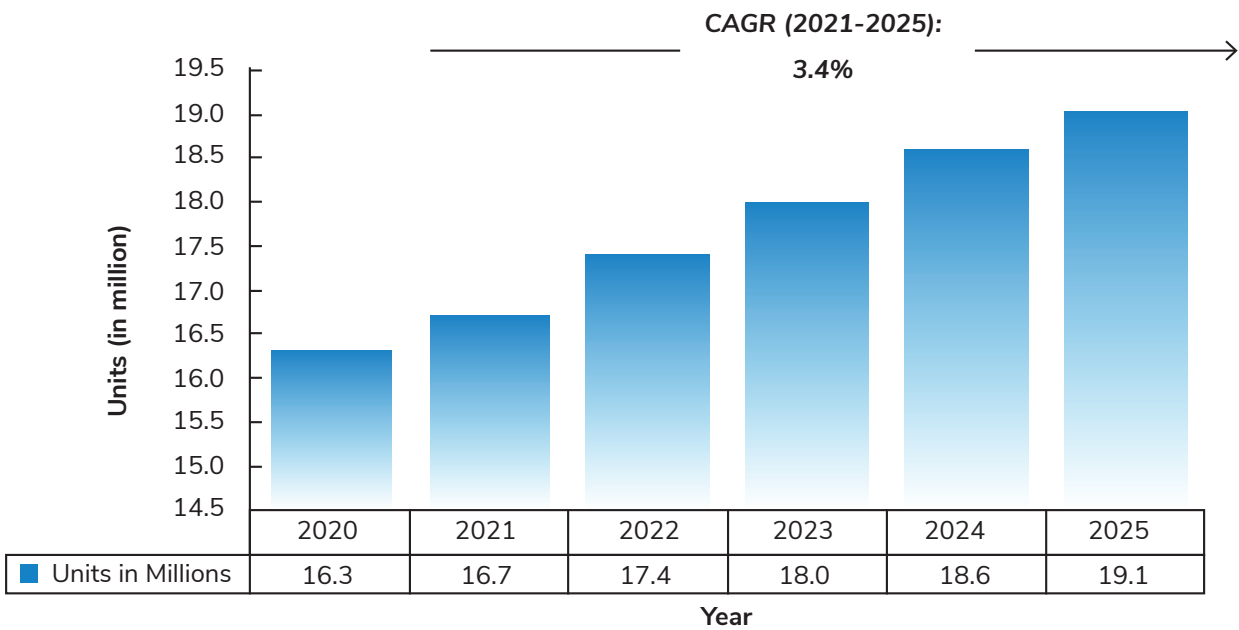


GCC Light-vehicle Aftermarket Revenue Forecast

4. GCC Light-vehicle Aftermarket Revenue Forecast

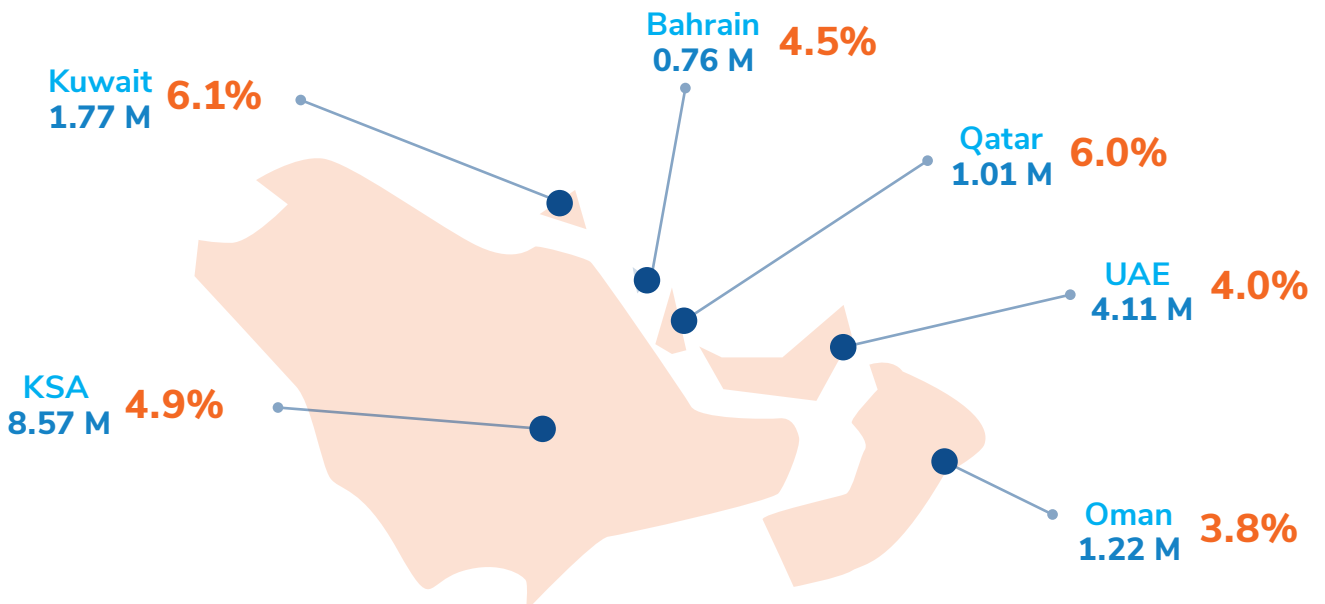
4.1 Light Vehicle in Operation in the GCC Region

LIGHT VEHICLE VIO, GCC, UNITS IN MILLION, 2020 - 2025F

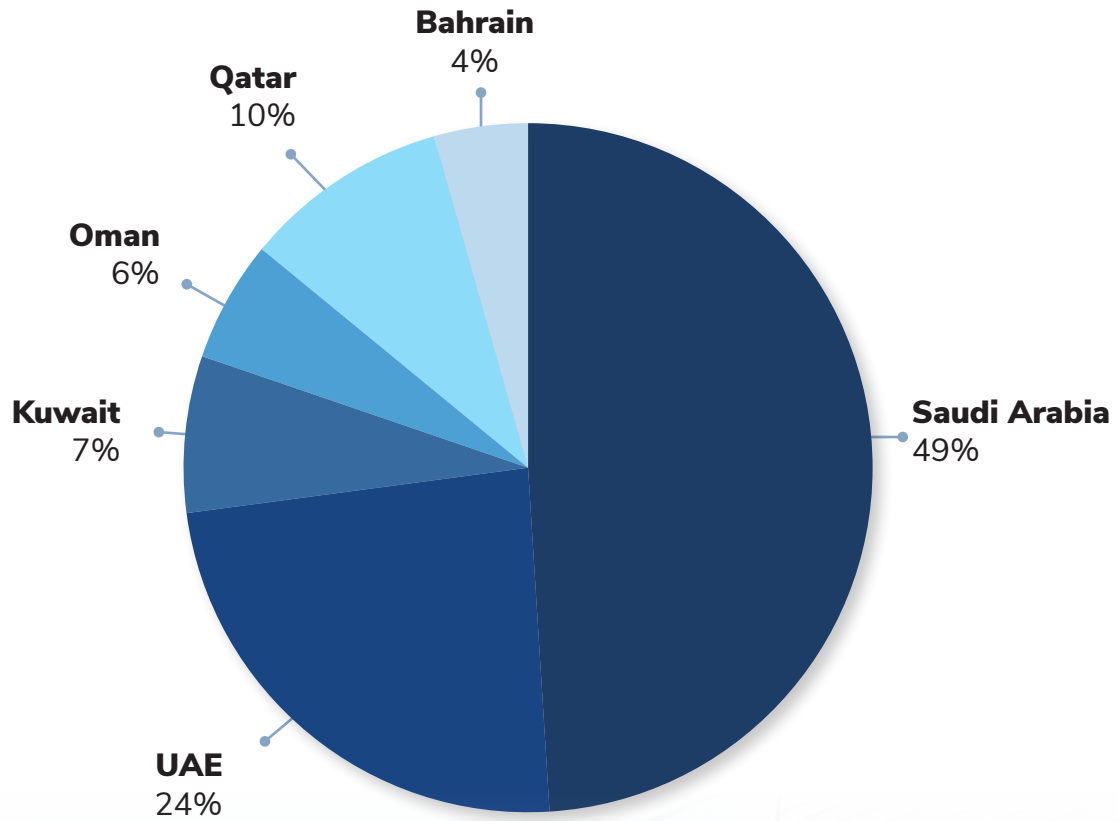


4.2 GCC LV VIO 2021, By Country

LIGHT VEHICLE VIO AND Y-O-Y GROWTH RATE BY COUNTRY, GCC, 2022

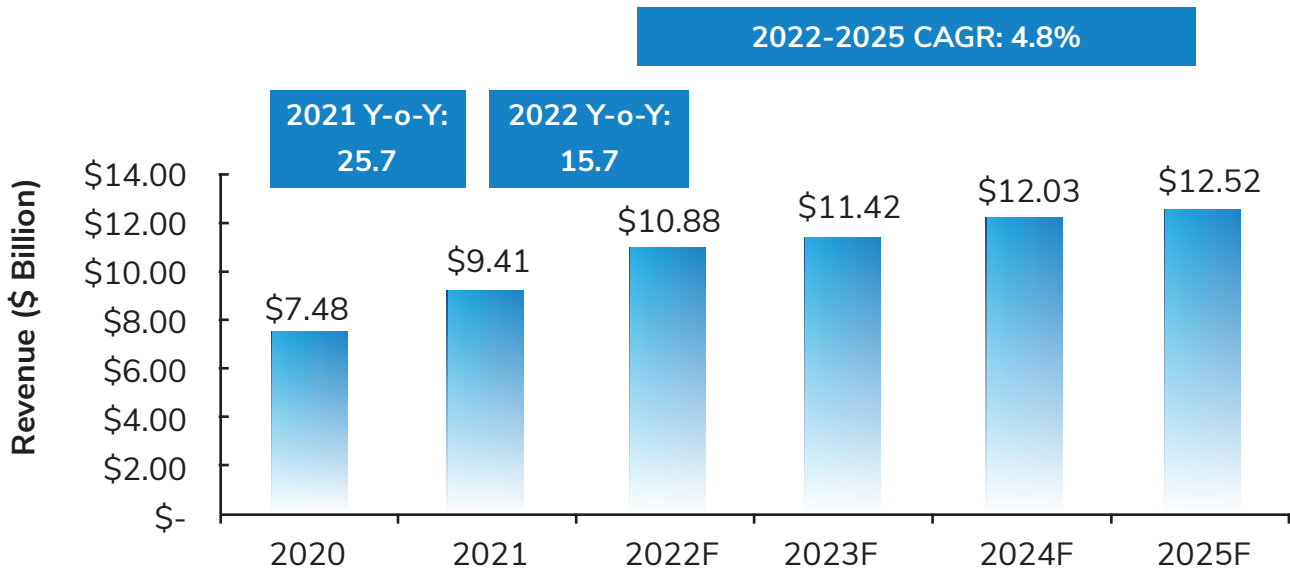


SHARE % OF LIGHT VEHICLE VIO, GCC, 2022F



4.3 GCC LV Aftermarket Revenue (2020–2025f)

LIGHT VEHICLE AFTERMARKET: REVENUE FORECAST,* GCC, 2020–2025F

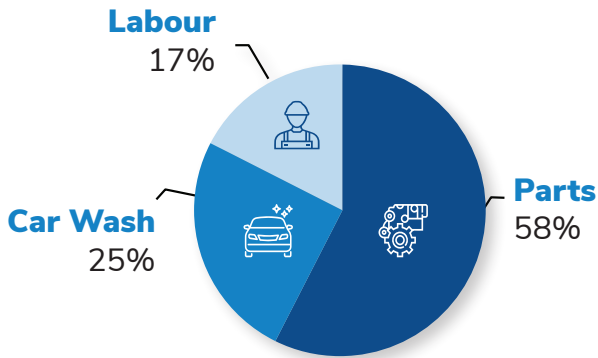


* Retail level, labour costs included, car wash excluded.

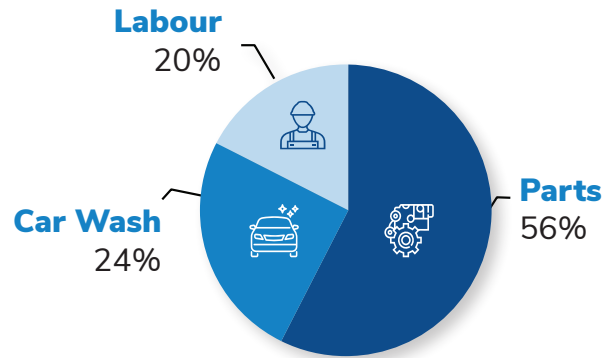
- The light vehicle aftermarket revenue witnessed 25.7% year-on-year (y-o-y) growth in 2021 and is expected to grow at a similar pace of 15.7% in 2022.
- The high growth statistics are inflated due to the global supply chain crisis, during which shipping costs have increased by 300% to 600% for different routes. The shipping costs are expected to gradually reduce from late-2022.
- The real growth of market demand is estimated to be ~13% in 2021, contributed by a growing light vehicle parc in the GCC and resumed demands due to recovered VMT post-COVID.
- The real growth in is estimated to be ~5% in 2022, contributed by the active economic activities in the region.
- The GCC light vehicle aftermarket is estimated to grow at a CAGR of 4.8% from 2022-2025, mainly contributed by the increasing vehicle parc.
- The GCC countries are accelerating the pace of EV adoption, especially in Saudi Arabia, UAE, and Qatar, where there are multiple goals and initiatives set by the governments. As the maintenance cost of EVs is 30%-40% lower than ICE cars, the adoption of EVs is likely to reduce the overall aftermarket revenue. However, by 2025, the penetration of EVs in the total car parc is estimated to be between 0.5%-2% in different GCC countries. The influence of EVs on the aftermarket is less likely to be observed in 2025.

4.4 Spent Per Vehicle (SPV) in the GCC

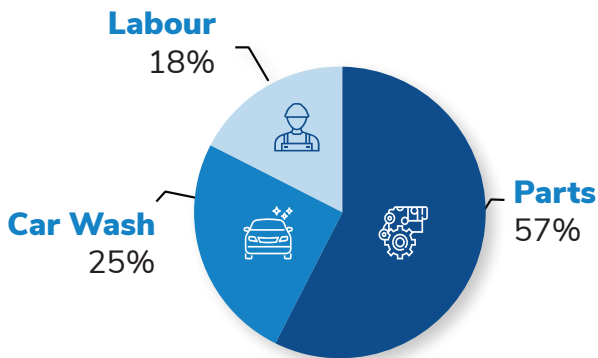
SPV LIGHT VEHICLE AFTERMARKET, BY COUNTRY, 2021, IN USD



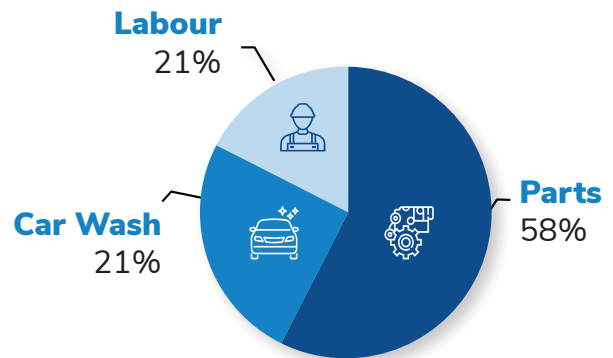
KSA SPV : \$658



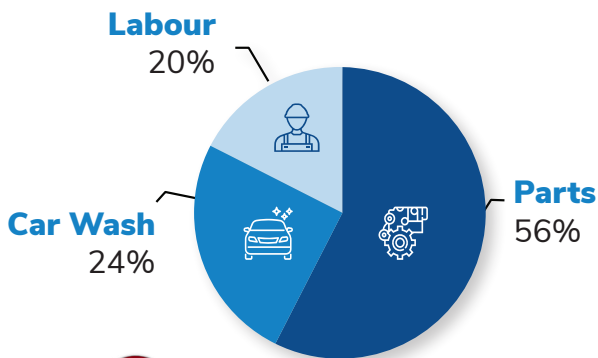
UAE SPV : \$803



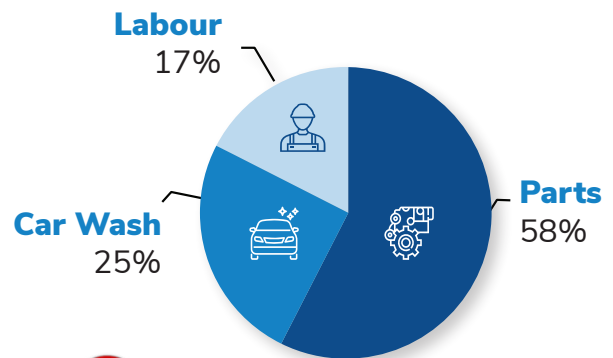
OMAN SPV : \$708



KUWAIT SPV : \$998



QATAR SPV : \$915



BAHRAIN SPV : \$679


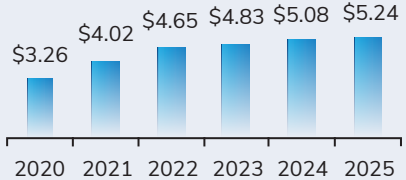

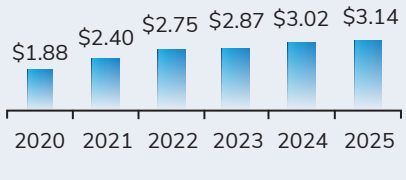

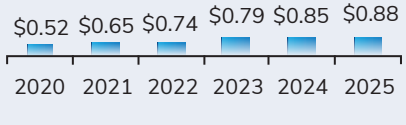

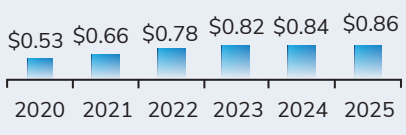



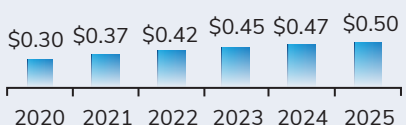

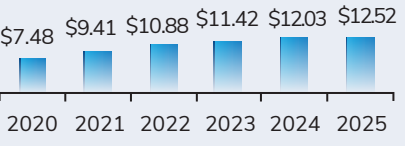
* Retail level, labour costs and car wash included.

- The GCC countries record similar cost structures in aftermarket sales. The costs of parts, in general, account for half of the spending.
- Due to the dusty environment stemming from the frequent construction activities around the country for the upcoming FIFA 2022 event, car owners washed their car more often in 2021 and 2022. Spending on car washes in Qatar was the highest among all GCC countries.
- Kuwait is the most active country in terms of car modifications. Car accessories sales top other GCC countries.



4.5 GCC LV Aftermarket Revenue, 2021, By Country

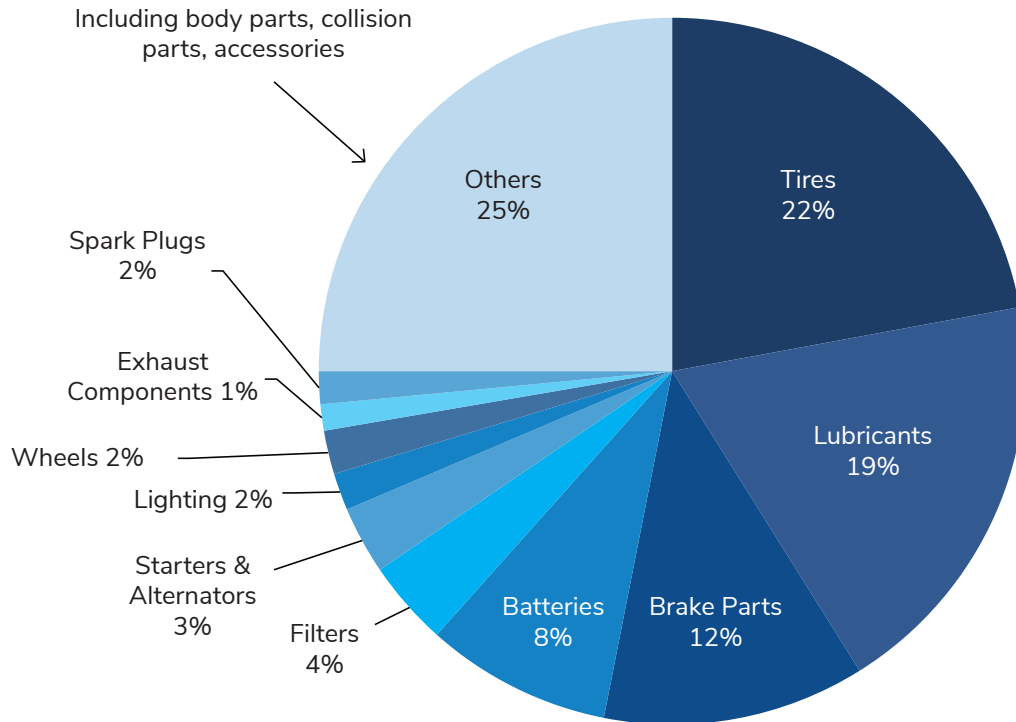
LIGHT VEHICLE AFTERMARKET: REVENUE*
FORECAST BY COUNTRY, GCC, 2021-2025

Country	Aftermarket Revenue* (\$ Billion)	2021 Y-o-Y	2021-25 CAGR	Aftermarket Outlook
 		15.8%	6.8%	Saudi Vision 2030 and the government's interest in developing tourism, manufacturing, and infrastructure propel the automotive industry. The fast-growing number of female drivers is expected to be a main driver of the VIO in Saudi Arabia.
 		14.6%	7.0%	The influx of expatriates in the UAE is expected to drive the VIO in the country, increasing aftermarket demand. The UAE has the fastest EV adoption among the GCC countries. By 2025, it is estimated 2% of the VIO will be electrified. However, the effect on the aftermarket revenue is not yet anticipated to be an issue in 2025, as the aging petrol fleet will still drive demand.
 		14.5%	7.9%	The Oman aftermarket is estimated to grow steadily with the recovery of the economy post-COVID.
 		17.0%	6.7%	FIFA 2022, taking place at the end of 2022 in Doha, has driven fleet sales, which is expected to drive sales of fast-moving parts (lubricants, batteries, tires) and car washes.
 		17.6%	9.9%	Besides the inflated shipping costs, the Kuwait aftermarket has also seen inflation in labor costs post-COVID. Dealers have witnessed a 5% to 10% cost increase in new hire, especially for skilled workers in the aftermarket.
 		14.6%	7.6%	The Bahrain aftermarket is estimated to grow steadily with the recovery of the economy post-COVID.
 		15.7%	7.4%	

* Retail level, labour costs included, car wash excluded.

4.6 GCC LV Aftermarket Revenue 2021, By Product Category

SALES*% OF LIGHT VEHICLE PARTS, THE GCC, 2022



- TBL (tires, battery, lubricants), the fast-moving parts, account for almost half of the aftermarket revenue.
- Every GCC country has slightly different dynamics on parts demand.
- In Kuwait, the share of body parts and collision parts is ~30%, given a higher rate of car accidents.
- Due to extreme weather in Kuwait (the higher temperature in the summer and low temperature in winter), the average life of a car battery is lower than other GCC countries. The share of batteries is also higher than the average GCC level, standing at 10% to 12%.
- The revenue of parts exclusive for ICE cars (such as lubricants, spark plugs, oil filters, and transmission filters) is estimated to gradually reduce with the growing EV adoption in the GCC, especially in the UAE, Saudi Arabia and Qatar. However, the impact is expected to be observed from 2026-2027, when EV makes up 2% to 4% of the total PV parc.

Top 8 disruptive trends in the vehicle aftermarket

1. Supply Chain Disruption from COVID is Expected to Extend to 2023



Key Trends/Themes:

- The global shortage of containers is the major “engine” driving up the price of parts. According to Drewry World Container Index, the index increased drastically from \$1,500 in Q2 2020 to over \$10,000 in Q3 2021. In 2022, it stayed over \$9,000 in Q1 and slowly dropped to the range of \$7,000 to \$8,000.
- The surge of freight has resulted in higher landing costs. Franchised dealers have adjusted prices frequently to match the rising costs, especially for fast-moving parts. In the aftermarket, the costs of parts have risen by 20%, on average, in the GCC. Service parts, such as lubricants, tires, batteries, brake pads, etc., have seen even higher fluctuation over body parts, with a 20% to 40% increase in retail price.
- Besides costs, the extended lead time has also been one of the major challenges for wholesalers and franchised dealers in the GCC. While shipping from Europe has mostly resumed to pre-COVID levels, lead times from China and other Asian countries have extended by (30% to 60%) 3 weeks to 2 months. This is mainly due to a global shortage of containers, shortage of vessels, and congestion of ports and customs in export and import countries.
- Supply chain disruptions have caused different levels of impact on parts distributors and retailers. The level of impact depends on country of origin and stock planning.



Key Implications for Stakeholders:

- The industry expects the situation to continue throughout 2022. The lead time is expected to slowly recover to the pre-COVID level in late-2023; however, the freight index is estimated to stay at about \$3,000, even when the global supply chain recovers to a balance of supply and demand.



2. Digitalization of Parts Retail



Key Trends/Themes:

- E-commerce and digital players will disrupt the traditional parts-distributor business, and workshops will witness the proliferation of specialized players (for example, EV or fleet maintenance).
- E-commerce of parts retailing has been in a high-growth stage since 2018. With the physical restrictions accelerating the e-commerce adoption in parts retailing during COVID-19, parts online retailing has entered a mature stage in a number of developed economies, such as Italy, Germany, US, China, etc. In the GCC, the automotive aftermarket e-commerce market has been emerging for the past five years at a slow and moderate pace. The restriction of physical activities during the COVID-19 pandemic was a tipping point in which digitalization of the customer journey with different automotive service and retailing in the GCC accelerated.
- UAE and Kuwait have been the pioneers in online parts retailing. In the UAE, online marketplaces like Amazon and Noon have a strong presence and established a substantial online portfolio of parts, especially on consumables like batteries, oil filters, and small accessories like interior organizers and gadgets. In Kuwait, direct selling e-commerce platforms are more popular. Several reputable parts distributors, such as Auto 1 online (KAPICO) and Al Babtain Auto have established their own e-commerce digital-twin platforms.
- In 2021, a Saudi-based start-up focused on building an online parts buy-and-sell platform raised \$1.8 million in funds, setting the tone for the roll out of the digital retailing era in the auto parts segment in Saudi Arabia.



Key Implications for Stakeholders:

- E-commerce provides customers higher accessibility and transparency.
- As e-commerce is expected to penetrate further in parts retail in the GCC, a number of parts retailers have actively developed parts e-commerce platforms.
- Establishing an e-commerce involves a substantial amount of costs for hardware, software and IT human resources. Parts retailers need to understand that parts e-commerce doesn't necessarily mean establishing their own e-commerce platform. There could be multiple business models to increase the digital retail footprint. For example, there are parts dealers who partnered with other e-commerce platforms to sell on the marketplace.

3. Growing Competitive Aftermarket



Key Trends/Themes:

The trend reflects two aspects:

- A number of automotive players (such as car dealers and rental companies) have established their own garages/body shops. Businesses are trying to achieve several benefits by adding car services as part of the revenue stream:
 - 1) Diversifying business portfolios and revenue streams.
 - 2) Lowering costs by servicing their own vehicle fleet, in some cases, taking control and ensuring the quality of car service. For example, CARS24 in the UAE has invested in its own facility to refurbish the used car inventory to control the quality of the refurbishment and the claim of the warranty policy.
- There have been new workshops in the market targeting niche customer segments, which mostly stem from shared nationality or culture. For example, in the UAE, with many Chinese nationals moving into the country since 2020, several workshops were set up to service the Chinese community. With the advantages of Chinese language and social media tools, the workshops have successfully gained the business of the community.



Key Implications for Stakeholders:

- The quality of the car service is a key to customer satisfaction for workshops. However, to capture and retain customers in a competitive landscape, it is important for workshops to improve their customer journey to increase customer satisfaction beyond the car service; for example, ease of booking service, customer reward program, working on customer feedback, etc.



4. Women-focused Car Service in Saudi Arabia



Key Trends/Themes:

- Since the Women to Drive Movement in 2018 in Saudi Arabia, most of the franchised dealers have restructured their operations to create a comfortable customer experience for female drivers. They set up women lounges in the service centers or the 3S facilities, providing privacy and comforts for female customers. A number of OEMs and franchised dealers have put more efforts than others, including training salesmen, test drives, aftersales, customer touch points, and referral programs. They retouched every detail to build a female-driver community.
- For example, a car dealer in the central region put efforts into upgrading the 3S facility since 2021. It redesigned the service center and upgraded the women lounge, offering a comfort area with privacy for female customers to wait for the vehicle delivery. A comfortable couch, coffee machine, free Wi-Fi network, and lady's room inside the lounge are standards for the women lounge.
- The three car dealers who have upgraded the female lounge are also in the top five in new car sales among female buyers post-COVID.



Key Implications for Stakeholders:

- According to the International Trade Administration (ITA), female drivers are estimated to drive new car sales by 9% annually until 2025 in Saudi Arabia. As a former predominantly male-focused market, it is important for car dealers to rethink their customer journey to create a sense of safety and comfort for female customers.
- From car sales to service, the customer experience for female customers is considered to be a vital point for new car sales in the next 3-5 years, given the fast-growing number of female drivers in Saudi Arabia.
- Some sizable dealers have not yet built a dedicated female lounge with their 3S/2S facilities.



5. EV Service



Key Trends/Themes:

- As much as EV adoption in the GCC region is behind other advanced regions like Europe, the US and China, from 2021, many major announcements were made, and a number of initiatives have taken place.
- Saudi Arabia, the UAE, Egypt and Morocco have established local EV manufacturing or assembling, with Al Damani DMV300 from M Glory in the UAE being the first EV model to be sold that is made in the GCC.
- The VIO of EVs in the GCC region is expected to see double- or triple-digit growth every year from 2023 to 2030, with the UAE being the pioneer. The first EV-focused aftermarket workshop was established in the UAE. It offers EV servicing, warranty extension, and repairs.
- A number of garages in the GCC have started the pipeline of building EV service capabilities, including mechanic trainings, installing EV service infrastructures, etc.



Key Implications for Stakeholders:

- Although the VIO of EV in the GCC is expected to surge from 2023, the demand for petrol car services is not expected to see significant influence until 2030.
- The mechanisms between EV service and petrol car service don't share a lot of similarities; the infrastructure, skills of mechanics and devices are different. Hence, in the near future, it is likely there will be an emerging number of EV-focused garages. It is less likely a small or mid-size garage will provide specialized services for both petrol cars and EVs within the same facility, except for services like car washes and tire changes.



6. Data & Customer-centric Service



Key Trends/Themes:

- With the automotive service business moving online, the transparency of car services has empowered customers with visibility on pricing, service quality and responsiveness. Some workshops encourage customers to leave feedback on Google Maps to build up public reviews.
- Automotive service providers can also leverage data to learn customer behaviors and gain and retain customers.
- Several kinds of approaches have been seen in the GCC aftermarket:
 - Hiring marketing companies to increase online exposure to gain customers, mostly using SEO solutions.
 - Partnering with automotive-focused online aggregators to do consumer surveys to understand consumer behaviors.
 - Using data analytics within e-commerce platforms/daily operations to understand customer retention and new sales.
 - Purchasing automotive data from specialized companies.
- One of the top battery retailers in the GCC collected data regarding the waiting time for a customer to change car batteries, which they used to redesign the customer journey and managed to cut the waiting time by 40%.
- Several automotive data companies in the region (such as AlgoDriven) provide real-time data for automotive companies to understand current customer needs.



Key Implications for Stakeholders:

- The essence of being customer-centric is about understanding customer behaviors, including driving behaviors and decision-making, to cater the operation to be more accessible and increase customer retention.



7. AM Parts to See Higher Demand



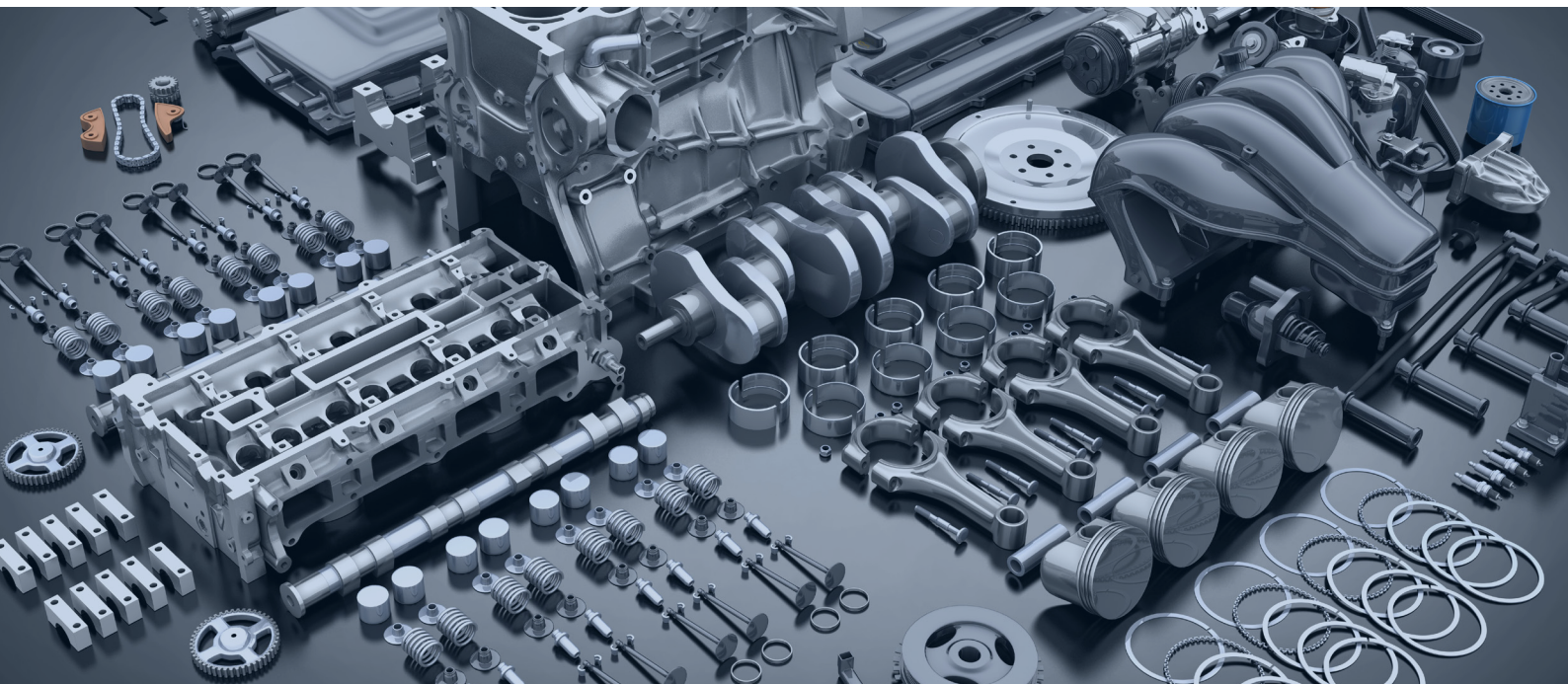
Key Trends/Themes:

- Due to the shortage of containers in the disrupted global supply chain, freight has increased and caused higher landing costs for automotive parts.
- The price for both genuine and aftermarket parts has been inflated by the shipping costs; most have increased by 10% to 35% compared to pre-COVID in 2019.
- The price advantage of AM parts has increased with inflation. Parts that are made in Far East Asia usually offer competitive prices; however, due to the COVID situation, many parts manufacturers in parts supplying hubs such as China and Indonesia have not resumed 100% operation. The lead time of parts has increased from 2-3 months to 5-6 months. On the other hand, the lead times of parts from Europe have met with the expected lead time of 1-2 months. Although at higher costs, AM parts from Europe meet market demands.



Key Implications for Stakeholders:

- The delicate supply chain challenges require parts traders and wholesalers to be flexible in sourcing parts.
- Parts wholesalers that previously stocked up parts had the advantage of supplying for the market demand with flexible markups. Especially for fast-moving parts (such as lubricants, oil filters and spark plugs), some wholesalers that stocked up during COVID have shifted to retailing and gained a customer base from authorized dealer outlets.



8. Auto Parts Manufacturing in Saudi Arabia



Key Trends/Themes:

- Most of the auto parts in the GCC are imported. Besides lubricants blending and a strong vehicle battery manufacturer, there is limited presence of other auto parts manufacturers in the GCC.
- As a by-product of oil, lubricants are commonly blended in the region. Automotive lubricants from a number of reputable brands are produced, such as Gulf Oil lubricants, Q8 lubricants.
- Automotive battery The partnership between GM and MEBCo to manufacture AcDelco automotive batteries demonstrated a best practice in automotive aftermarket manufacturing in the region. Since 1998, it has produced and sold 50 million batteries in the region.
- Most of non-chemical auto parts manufacturing activities in the GCC region are in Saudi, which are also limited to a number of parts, such as bumpers (limited), gaskets, and brake pads for light vehicle, and a few specialized manufacturers for certain parts of heavy vehicles, such as axles, foundries.



Key Implications for Stakeholders:

- The rollout of Saudi-made cars and UAE-made cars could potentially trigger the growth of auto parts manufacturing in the region. The first UAE car manufacturer M Glory announced the sales of its first EV model Al Damani DMV300 in late June. Saudi National Automotive Manufacturing Company (SNAM) and Lucid Motors are building their production facilities in the kingdom. SNAM is planning to produce 10,000 petrol cars, while Lucid is expected to sell the locally made EV in 2026. The growth of GCC car manufacturing would first create market for OEM replacement parts, and potentially trigger the growth of aftermarket parts in the region.
- As part of the national vision of GCC countries to diversify the economies and reduce the dependence on oil, auto parts manufacturing could help enlarge the business portfolio, and also contribute to grow the car manufacturing ecosystem in the region.
- On the other hand, with the ongoing volatility of the global supply chain, supplying parts locally stands a greater advantage in lead times and delivery costs.



Glossary of Terms, Abbreviations and Acronyms

Nr	Term	Description
1	CAGR	Compound Annual Growth Rate
2	EV	Electric Vehicle
3	GCC	Gulf Council Corporation
4	IAM	Independent Aftermarket
5	LV	Light Vehicle
6	OEM	Original Equipment Manufacturer
7	Parc	Number of vehicles in use
8	PV	Passenger Vehicle
9	SPV	Spent per Vehicle
10	VIO	Vehicle in Operation
11	YoY	Year on Year (Growth Rate)

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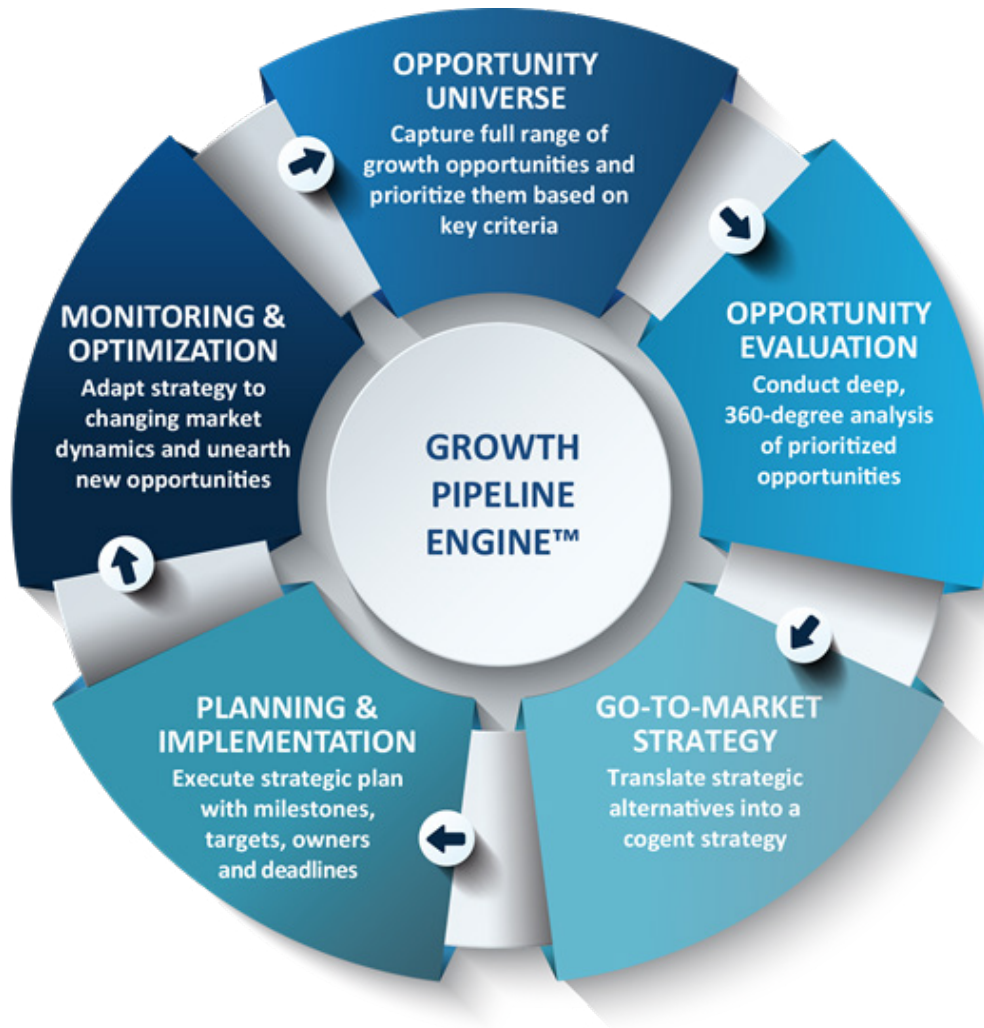
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About Automechanika Dubai

Automechanika Dubai is the Middle East's largest international trade show for the automotive aftermarket, covering six major product sections of Parts & Components and Electronics & Systems; Accessories & Customizing; Tyres & Batteries; Repair & Maintenance; and Car Wash, Care & Reconditioning.

In its 19th edition in 2022, the annual three-day event – in addition to hosting exhibitors from 58 countries and 13 dedicated country pavilions – will feature exciting new elements such as the Automechanika Awards, the Modern Workshop, and the Tools & Skills Competition.

Returning popular highlights include the Automechanika Academy, AfriConnections, and the Innovation Zone, keeping the many thousands of trade buyers and industry professionals in tune with new market developments.

Through its dedicated Truck, Agriculture, Motorcycle, and Classic Car Competence initiatives, Automechanika Dubai is the one-stop-shop for the entire aftermarket value chain, from parts and accessories, to workshop equipment, body repair and care.

More information is available at: www.automechanikadubai.com

About Frost & Sullivan

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