



*Diagonal Reports*

**GLOBAL AFTERMARKET PANEL**

**AUTO SERVICES:  
THE COLLISION REPAIR (CR)  
MARKET 2006 - USA**

**SAMPLE PAGES**

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## **SECTION REPORT STRUCTURE**

### **SECTION 1 EXECUTIVE SUMMARY**

This section presents the main statistical data in table format. The main points are then summarized, for example, sales trends and winners/losers.

### **SECTION 2 CR MARKET SIZE (VALUE, NUMBERS OF UNITS/TECHNICIANS) AND STRUCTURE**

This section presents the turnover in the CR industry, the numbers of facilities, and the main types of service providers and players.

It then looks at the numbers of auto repair technicians and mechanics, of certified technicians, and of providers of technical training.

The section then looks at the market structure, and compares the size of the "average" facility with some examples of turnover in larger sized units.

Finally, it looks at changes in market structure, such as trends in the numbers of units, and at drivers of changes.

### **SECTION 3 CR MARKET CATEGORIES - SERVICES AND PARTS**

This section looks at the size of the CR market and at the market breakout in terms of the cost of labour/services and of parts.

It then looks at the breakout of the market by categories of repair services and parts. Each service category is then treated separately.

### **SECTION 4 CR MARKET – PARTS (OE AND OTHER, SUPPLIERS / BRANDS)**

This section looks at the breakout of the CR parts in terms of OE (original equipment), non-OE, not new, domestic, and imports.

The top brands are identified, and ranked, and the value of their sales into the CR market is estimated.

It then looks at the changes in the CR parts market, and at the drivers of change.

### **SECTION 5 CR MARKET SERVICE PROVIDERS AND GROWTH STRATEGIES**

This section looks at strategies that drive growth in the stagnant CR services market. Prominent among these are the programs for CR service providers. It examines elements that are common to many programs.

The section then surveys the different types of programs (third-party by insurers, the carmakers' and product suppliers' programs, the franchisers' and consolidators' programs, and the networks of independents).

It then looks at the awards and recognition programs for the best performing SP/s.

### **SECTION 6 INDUSTRY CONTROVERSIES**

This section looks at the controversies that surround insurers' direct repair programs (DRPs) and non-original equipment (OE) parts.

SECTION 7 CR PROFILES - SERVICE PROVIDERS (SELECTED – CARMAKER DEALERSHIPS, LARGE OR MULTI-OUTLETS, CR GLASS AND PAINT)

This section profiles over fifty collision repair service providers identified as among the most significant players in the industry.

Carmaker dealerships with CR services are profiled first.

Large or multi-outlet/ franchised CR providers are then profiled.

These are followed by profiles of multi-outlet CR providers specializing in paint and glass.

SECTION 8 CR PROFILES – TRADE, INDUSTRY, AND PROFESSIONAL ASSOCIATIONS, AND REGULATORY BODIES

This section briefly profiles the leading association in collision repair in the USA.

SECTION 9 CR DATA SOURCES

This section outlines the data sources consulted for this report.

SECTION 10 CR GLOSSARY OF TERMS

This section defines terms commonly used in the CR industry.

SECTION 11 APPENDICES

The appendices set out more detailed and additional data to compliment the body of the report, and sometimes highlight conflicting data.

SECTION 12 INDEX OF COMPANIES, BRANDS, ASSOCIATIONS, ETC

## **SECTION 1 EXECUTIVE SUMMARY**

This section presents the main statistical data in table format. The main points are then summarized, for example, sales trends and winners/losers.

**TABLE 1 USA CR market - key statistics (2005)**

CR units	X
- of which independents	X%
- % variation 2005/07	-(x) %
CR market (\$)	\$x billion
CR market % variation	+/- x%
- parts	X%
- labour	X%
Auto repair technicians	X
- average per CR unit	X
- average per CR unit independent	X
<b>Services/parts' categories, ranked</b>	<b>% of market</b>
1. Body	X%
2. Paint	X%
3. Glass	X%
4. Other (n.s.)	X%
<b>Total</b>	<b>\$x billion</b>
<b>Sales of parts</b>	
OE (original equipment)	X%
Non-OE	X%
Not-new	x%
Domestic	X%
Imported	X%
<b>OE brands (ranked)</b>	<b>% parts sales</b>
1. General Motors–GM	X%
2. Ford	X%
3. DaimlerChrysler	X%
4. Toyota	X%
<b>Total</b>	<b>\$x billion</b>
<b>Paint and glass brands (unranked)</b>	
x	-
x	-
x	-
x	-
x	---
<b>CR service providers (unranked)</b>	
CR with DRP contracts	X
Independents	X
Dealers with CR facility	X
Franchises	>x

(All data is 2005 unless stated otherwise.)  
(Source: DR GAP CR USA 2006.)

### **Trends**

The collision repair (CR) industry is x in value terms. It is x in terms of the number of repairs and the number of CR outlets. The numbers of vehicles -

**new parts** because of lower prices. This trend is driven by insurers' demand for lower prices and by regulatory pressures to increase recycling rates and to reduce the level of disposal. Not-new parts companies nibble into the OE market share, currently at x%.

#### **Data conflict / market definitions**

There is major data conflict about many of the basics of the CR market, such as, total turnover and numbers of outlets. The conflict is due to different definitions and limits of the market, among which distinguishing between CR and other auto repair services, and the inclusion/exclusion of an unofficial repair market.

CR is one part of a larger auto service repair industry. In the USA CR could be worth about x% of this larger market, which is valued at \$x billion a year. The larger market includes many outlets that offer "generalist" and "cosmetic" repairs, for example, of dents.

#### **Date of publication / currency**

Date of publication is August 2006.

Currency used throughout report is USD (\$).

## GRAPH with Table 4, CR market (%) distribution of facilities

(Source: DR GAP CR USA 2006.)

### TABLE 4 CR market (%) distribution of facilities and turnover

(As % of total. Figures rounded. Multiple counting possible.)

Market segment	Units	Turnover
Independents	x%	x%
Authorised dealers	x%	x%
Others	x%	N/A
Total	x%	\$ x billion

(Source: DR GAP CR USA 2006. Market experts panel representing at least 15,000 CR outlets across the USA.)

#### CR facilities – service providers

Approximately x outlets across the USA are specialist auto collision repair (CR) service providers, that is, their income is mainly derived from collision-related work, such as repair and refinish, and the related replacement of parts.

#### Independents and other service providers

Independently owned auto repair shops account for approximately x% of the CR market in volume and in value terms. The remaining x% are multi-unit operators and corporate affiliated shops, such as authorized dealerships.

There were x CR facilities installed inside the x authorised dealership outlets across the USA in 2005. The latter figure is down from x in 2003.

There could be another x multi-unit facilities run by franchises, consolidators, and fleet operators. Examples would include x, x, and x. Among the fleet operators that provide their own CR services are x.

There are different definitions of a “multi-unit” operator. One definition is “three or more” units per operator, another is “x or more” units. The latter definition is by a nationwide training provider, x.

## **SECTION 4 CR MARKET – PARTS (OE AND OTHER SUPPLIERS / BRANDS)**

This section looks at the breakout of the CR parts in terms of OE (original equipment), non-OE, not new, domestic, and imports. The top brands are identified, and ranked, and the value of their sales into the CR market is estimated. It then looks at the changes in the CR parts market, and at the drivers of change.

### **GRAPH with Table 11, CR parts sales (%) OE, non-OE, not-new**

(Source: DR GAP CR USA 2006.)

### **TABLE 11 CR parts sales (%) OE, non-OE, not-new**

(As % of total. Figures rounded.)

<b>Parts</b>	<b>\$ billion</b>	<b>%</b>
OE (original equipment)	\$x	x%
Non-OE	\$x	x%
Not-new	\$x	x%
<b>Total</b>	<b>\$x</b>	<b>x%</b>

(Source: DR GAP CR USA 2006. Market experts panel. The market experts are industry experts representing at least 15,000 CR outlets across the USA. See: SECTION 9 DATA SOURCES.)

### **OE parts**

Original equipment (OE) parts account for, on average according to the expert panel, x% of the almost \$x billion worth of parts sold into the CR market. Non-original equipment (non-OE) parts are x%, and not-new parts are x%. (Other terms for non-OE parts are “aftermarket,” “generic,” and “imitation.”)

The share of OE parts in the CR parts market varies somewhat in the different market segments. The luxury car segment is almost x% OE. The luxury market includes the brands Audi, BMW, Jaguar, Mercedes-Benz, and Porsche.

### **Estimates disputed**

In previous research by Diagonal Reports, some auto industry experts argued that only x% of parts' sales into the overall auto services aftermarket are OE. They insisted that higher estimates of OE sales are extrapolations that are based on sales into the authorized dealership segment, which is the smallest market segment. Further, they noted some quirks in data collection. Among which are that sales of some OE parts into the repair/replacement market are not counted with the parts' aftermarket but with sales of new vehicles. Another is that parts/brands sold for installation at the point of manufacture are often listed as OE, but parts/brands that only have replacement sales are listed as non-OE.

## **CR MARKET - PARTS - SUPPLIERS / BRANDS**

### **GRAPH with Table 15, CR parts – ranked by brand**

(Source: DR GAP CR USA 2006.)

**TABLE 15 CR parts sales by brands (ranked)**

(Figures rounded.)

<b>Rank</b>	<b>OE supplier</b>	<b>\$ billion</b>	<b>%</b>
1	x	\$x	x%
2	x	\$x	x%
3	x	\$x	x%
4	x	\$x	x%
	x	\$x	x%
	x	\$x	x%
	OE (sub total)		x%
	Non-OE	\$x	x%
	Not-new	\$x	x%
	Total	\$x	x%

(Source: sales into the CR parts market are based on each company's sales of light duty vehicles in 2005, as reported by NADA.)

(Source: DR GAP CR USA 2006.)

### **Brands and sales into CR parts market**

Original equipment (OE) brands account for x% of parts sold into the CR market. Experts' estimates of the share of OE parts range from x% to x0%.

Non-OE brands have a x% share of the CR market (worth \$x billion), and the not-new parts, both OE and non-OE, have a x% share (worth \$x billion).

### **Measuring brand share**

Each company's sales of parts into the CR market broadly reflects its share of the vehicle parc in the USA. The CR parts market reflects the composition of the vehicle parc because, as one expert said, "It is very simple, the more of a make there is on the roads, the more likely it is that they will be involved in a smash."

(The vehicle parc is the total number of vehicles in the USA. For a list of carmakers sales of light duty vehicles in 2005 see: APPENDIX CAR MAKES.)

### **The top OE brands**

The leading brand in the CR parts market is x with a x% share. It could sell \$x billion worth of parts into the CR channel.

The leading OE brands are the "Big Three," followed by x. The "Big Three" continue to lose sales to x, which is set to replace x as the number three ranked brand in the USA.

**More than a price difference**

Price differences between new OE and other parts range from about x% up to x%.

Non-OE parts cost from x% to x% less than OE parts, and not-new parts cost x% to x% less than new parts. The actual differences depend on the part category.

However, the non-OE and not-new parts no longer compete on price only. They have made significant quality improvements, many of which are supported by certification programs.

**Parts and certification programs**

Certification programs (quality recognition programs) for non-OE parts, and for not-new parts, promote consistent product quality, adherence to safety standards, quality standards for ease-of-fitting, component materials, and corrosion resistance.

Among the largest and best known programs are the Certified Automotive Parts Association (CAPA) and the Manufacturers Qualification and Validation Program (MQVP).

## **SECTION 10 CR GLOSSARY OF TERMS**

This section define some terms commonly used in the CR industry. Very detailed glossaries of auto and related terms are available from the following:

- Aftermarket Factbook is the annual report of the Automotive Aftermarket Industry Association (AAIA) at [www.aftermarket.org](http://www.aftermarket.org).
- Collision Industry Conference (CIC) at [www.ciclink.com/terms.htm](http://www.ciclink.com/terms.htm), originally published in 1997, and updated in 2006.

**TABLE 29 List of terms used for parts**

<b>Non-OE part</b>	<b>OE part</b>	<b>Replacement part</b>
Aftermarket part	Generic parts	Aftermarket part
Grey part	Genuine part	Spare part
Imitation parts		
Non-genuine part		

(Source: DR GAP USA 2004)

This report uses the term **“auto aftermarket part(s)”** to describe parts installed into cars for a replacement purpose. That is, an aftermarket part replaces a part installed into a vehicle at the point of manufacture. (Other terms: replacement part, spare part.)

The replacement purpose is stressed because in the USA the term “aftermarket part” is sometimes used to differentiate non-OE parts from OE parts.

The term “original equipment (OE) part” refers to parts made by carmaker companies, for example, Ford. OE parts are sold for installation into vehicles at the point of manufacture and also to the service repair channel for replacement. The term “non-original equipment (non-OE) part” refers to parts made by companies other than carmakers.

### **“Genuine,” “non-genuine,” “grey” parts**

Other terms for OE parts are “genuine” parts. Other terms for non-OE parts are “non-genuine” and “generic.” The term “grey” part is sometimes used in the USA to describe non-OE parts. In this report, the term “grey” is only used to describe illegal parts, that is, counterfeit, smuggled, or stolen parts.

### **“Not-new” parts**

The not-new parts market is comprised of parts which have been removed from one vehicle and installed into another vehicle, sometimes after the part has been cleaned, or partially or totally remanufactured (repaired, recycled).

### **Other terms**

**Dealers (selective, exclusive)** Systems used to distribute new or not-new vehicles/parts, some of which also provide service repair. **Exclusive** dealers are the members of a carmaker’s network, that is, they are

authorised/approved according to a set of criteria, and they only sell one brand of cars in an allocated territory. **Selective** dealers are not allocated a sales territory.

**DIFM** "Do-It-For-Me," where consumers use professionals to perform maintenance and repair work on their vehicles.

**Direct Repair Programmes (DRP)** Contracts between auto service repair providers and, for example, insurers and fleet operators.

**Distributors, Wholesalers, or Warehouse distributors** Large-sized companies which sell to other distributors. **Buying groups** (Europe), **Program Groups/Distributors/Consolidators** or **Distribution Centers - DC** (USA) are associations of suppliers who provide buying, marketing, or operational services to members and who work under a common promotional name or common ownership. **Warehouse Distributors** USA term for traditional wholesalers of automotive parts and supplies selling primarily to jobbers.

**DIY** "Do-It-Yourself," Refers to consumers who perform maintenance and repair work on their own vehicles.

**Informal (grey) market** Covers a variety of practices. For example, "backyard" mechanics (the service providers who operate from home), facilities such as "chop shops"/"cowboys." The grey market is low quality in terms of parts and services, it can fail to comply with regulations (covering environmental, consumer, and worker safety issues), and even handle stolen vehicles and parts. Legitimate outlets continue to lobby against the grey market, on the grounds that it offers unfair, and unsafe, competition to compliant outlets.

**Jobber** USA term for a person who buys parts from warehouse distributors and sells to garages, service stations, and retail outlets which serve retail customers.

**Not-new (used, second hand)** Parts removed from one vehicle and installed into another vehicle. **Remanufacture (rebuild, repair, restore, remachine, clean, partially remanufacture)** is the return of a part to a near-new state in accordance with the manufacturer's original specifications. The part provides similar performance, reliability, and longevity to a new part.

**OE - Original Equipment** Parts and components supplied for installation into vehicles at the point of manufacture, and to the service repair channel for replacement purposes.

**Parc** (population) All motor vehicles in circulation / registered in a certain geographic region. Includes privately and publicly owned light duty vehicles (cars, sedans, station wagons, convertibles, sports cars and, in the USA, vans and pickup trucks); heavy duty vehicles (trucks, transit buses, school buses), military vehicles, and sometimes motorcycles and mopeds.

**Pick up** services (call out, mobile) When a repair shop goes to the car, for example, on roadside, or tows the car to the shop to be fixed.

**SPs** Service providers.

**Tests** / inspection services. They can be compulsory (mandatory, government set) and deal with car road-worthiness, car safety, and environmental (pollution). The tests generate work when cars are taken to shops for pre-test work, but the tests are done only in approved outlets (certified inspection facilities). Parts tested include brakes, tyres, steering, lights, brakes, exhaust/emissions, wheel alignment, speed limiting devices, and noise control.

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