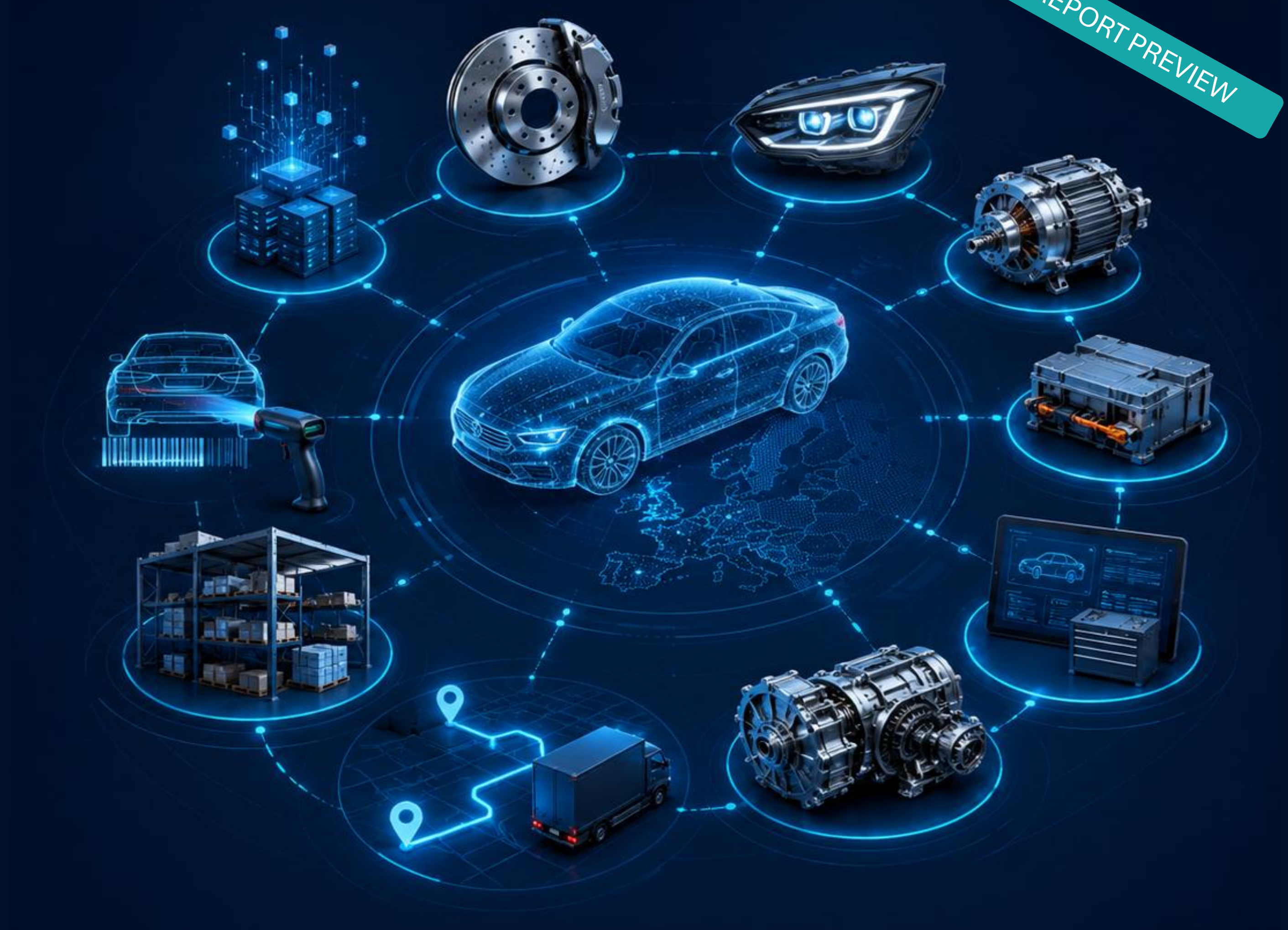
Digital
Spare Parts Platforms
in the European
Automotive Aftermarket

Market entry and strategy analysis for platform providers, parts dealers, distributors, workshop chains, OEMs, fleets, insurers and investors.

Focus: EU + EFTA + United Kingdom · B2B/B2C, data, logistics, fleets/insurance and circular parts.



REPORT PREVIEW

DTO
B2B Research & Strategies

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Data, workflow integration and circular parts are changing the basis of competition

The key trends affect not only demand but also margins, barriers to entry, customer behavior, partnerships and business models.

0–2 YEARS

Short-term drivers

Workshop procurement is digitizing, dealers are consolidating, price transparency is rising, returns from misidentification burden margins, and same-day/next-day remains critical to purchase decisions. Repeat purchases are driven by delivery windows, returns, goodwill and integration into workshop processes.

2–5 YEARS

Medium-term drivers

VIN and Fitment data, workshop software integration, fleet/insurance control, Used/Refurbished/Reman and regulatory data access are gaining importance. Customers value SLAs, reporting, approval workflows and robust savings evidence per repair case.

5+ YEARS

Long-term drivers

Electrification, ADAS, software-defined vehicles, vehicle data, cybersecurity, Right to Repair and circular economy are changing the parts mix and data requirements. Trust is built through condition data, inspection, warranty and controlled core/reverse logistics.

Market characteristics	more digital orders, greater data dependency and more process integration. OE/VIN hit rates and data maintenance are critical.
Competition	Scale advantages for large groups, but new niches for data, SaaS and circular parts. Condition, inspection and warranty build trust.
Customer behavior	Less phone/manual work, more portal/API use, and higher expectations for availability and error prevention. OE/VIN hit rates and data maintenance are critical.
Business models	Shift from price comparison to workflows and recurring data and managed-service revenue. Fitment, returns and trust constrain margins.

Sources: European Commission [S3–S4]; TecAlliance/TecDoc [S9]; Messe Frankfurt/BCG [S12]; FIGIEFA Conference 2024 [S14] | Qualitative assessment: DTO.

Attractive opportunities lie where risks are operationally manageable

Opportunities should not be viewed in isolation: Many attractive fields have high barriers to entry that must be actively managed through partners, data quality and operational discipline.

Opportunities

- Digitalization of independent workshops and workshop chains
- Better VIN/fitment data as a lever for returns and margins
- Circular parts: used, refurbished and remanufactured • Fleet and insurance processes with measurable ROI
- Roll-up of regional dealers with digital system harmonization
- CEE/Iberia/Italy as growth markets with older fleets.
- Key KPIs: downtime, approval time, claims cost, SLA compliance, auditability and used-parts share. Operationally, this requires network coverage, reporting, clear approval processes and contractually defined responsibilities.

Strategic value: Opportunities are especially strong when they solve a bottleneck that traditional dealers address only partially—such as part identification, process integration, quality assurance or network control. Attractiveness is sustainable only when returns, data access, working capital and service levels are controlled.

Risks

- Aggressive price competition and high customer acquisition costs
- Returns, support and goodwill costs caused by misidentification
- Dependency on catalog data, suppliers and OEM data access
- Working capital, inventory and local delivery density
- Cybersecurity requirements and inconsistent enforcement of data rights
- Integration risk in M&A and legacy IT.
- Key KPIs: hit rate, data errors per 1,000 searches, coverage, API availability and correction time. Operationally, this requires data rights, maintenance processes and validation against actual returns.

Risk logic: Margins must not be calculated as gross margin before returns, wrong parts, support, warranty and logistics. Seemingly attractive GMV can be economically weak if operating costs are not controlled. The leverage emerges only with regional density, clear cut-off times and a reliable returns process.

Link to attractiveness: High barriers to entry are not an exclusion criterion. They can protect against competition when a provider has data, local logistics, partner access and process expertise.

Sources: European Commission [S3–S4]; TecAlliance/TecDoc [S9]; Messe Frankfurt/BCG [S12]; FIGIEFA Conference 2024 [S14] | Qualitative assessment: DTO.