

# AA-STARS | Issue 4

Study paper

Automotive Aftersales Shop Index

October 2021

How to Make Better Decisions – With Speed4Trade Analytics



[www.speed4trade.com](http://www.speed4trade.com)



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## Summary

- Market research: 8,700 domains | 1,600 online shops | 1,200 eBay- & Amazon shops
- Market segment: Focus on Parts | Tyres & Rims | Specialized | B2C | CAR | Germany
- Market dynamics: Annual survey
- Market data: Objective algorithm | Customer centric view

In Germany, the **TOP 1,000 AA-STARs** online shops\*<sup>1</sup> generate revenue of **€1.6 billion**, including their eBay and Amazon channels.

On average, the **TOP 25** multi-channel traders generate **46% of their revenue on eBay** (10% Amazon, 44% online shop).

## AA-STARs – Benchmark with market dynamics

Successful online traders depend not only on outstanding digital trade solutions. They must also be familiar with and observe the market and competition in order to identify suitable courses of action. What matters in our view is to make better decisions on the basis of reliable information.

Speed4Trade established the **automotive after-sales shop index AA-STARs** as a benchmark to meet this requirement. We would like to present to you this fourth edition of our study paper. The study paper features an excerpt with the TOP 25 ranking as an initial guidance.

Our **fourth edition** also includes some reforms:

- Change from a six-monthly to a **full-year index** (September 2020 to August 2021)
- Complete mapping of all three segments: **Parts, Tyres & Rims** and **Specialized**
- Activities of online shop operators on **eBay** and **Amazon** as the most important B2C marketplaces
- Insight into the **TOP 25 rankings** for online shops, eBay, Amazon
- Summarised **company ranking** for a more transparent presentation of the companies' multi-channel activities

Speed4Trade is frequently mentioned as a relevant contact for the automotive after-market and digital trade solutions for B2C and B2B. Our knowledge of the market is as much in demand as the long-standing technical expertise we have acquired from a wide range of projects. This makes us a valuable business partner for all market players in the automotive after-sales sector (OEM/IAM parts manufacturers, parts wholesalers, car dealers, repair shops, pure online traders).



Head of Data Management & Analytics  
Speed4Trade GmbH

\*<sup>1</sup> In the interests of full disclosure, only 998 online shops made it into the ranking; refer to page 18.

# Motives for the study

The after-market structure is changing. Market shares are secured by reducing the distance to customers. With digital solutions!

The fourth edition of AA-STARS is all about multi-channel digital commerce and the use of B2C platforms. The Speed4Trade Trend Report for 2021 already demonstrates how platform efficiency and the digitalisation of distribution channels secure customer access\*<sup>1</sup> and improve resilience in turbulent times. 58% of the companies in the automotive after-market are multi-channel traders.

The automotive industry is experiencing a radical transformation. Not only are the automakers and suppliers being forced to reinvent themselves, they must do so at a dizzying pace. Meanwhile, the after-sales market is worried that this transformation might leave it behind or render it obsolete. But the COVID 19 crisis stands as proof of how resilient the after-market can be in times of crisis.

## How significant is B2C trade via platforms in the automotive after-market?

It is one thing to claim that eBay and Amazon are important distribution channels for the automotive after-market in Germany. Backing this up with facts and figures is an entirely different matter. This prompted us – as a leading provider of digital trading solutions for the automotive after-market – to expand our online shop index to include marketplace activities on eBay and Amazon.

## So, what's next?

Become a platform or at least “participate”.

## How is B2C revenue distributed between proprietary online shops, eBay and Amazon?

Some of the findings were frankly surprising, even to us. Although we are only showing an excerpt of the TOP 25 players per segment and distribution channel here, it is already clear that platforms account for the lion's share of sales, even at the top of the ranking.

Providers on the automotive after-market can draw the following benefits from this study paper: They receive information about competitors in B2C online trade. Also about online shops and marketplaces. This means that they obtain information about market distribution and their own position. They can therefore assess their own potential and plan measures on this basis.

Compared to previous studies, Speed4Trade is selecting an alternative perspective for the advice it provides. That's why we developed AA-STARS. This study makes our benchmarks available to the market, in the hope that doing so will encourage more meaningful dialogue with market participants.

\*<sup>1</sup> <https://www.speed4trade.com/unternehmen-und-aktuelles/news/trendreport/>

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with marketplace activities
- Company ranking: Summary at company level

### AA-STARs eBay shop ranking

TOP 25 eBay shops (according to revenue) in Germany that operate a proprietary online shop as well. The 1,590 online shops in the AA-STARs Index run 884 eBay shops in total, which is equivalent to annual trade revenue of €642 million, of which the TOP 25 account for just under 50%.

The TOP 25 AA-STARs eBay stores report annual revenue of **€318 million**.

**56%** of the companies in the automotive after-market generate sales on **eBay**.

| Ranking Index 2021 | TOP 25 Automotive aftersales eBay shops <sup>*1</sup> | Range classification |
|--------------------|---|----------------------|
| 1                  | www.atp-autoteile.de                                  | P                    |
| 2                  | www.bandel-online.de                                  | P                    |
| 3                  | www.ws-autoteile.com                                  | P                    |
| 4                  | www.atu.de  | P                    |
| 5                  | www.lott.de   | P                    |
| 6                  | www.just-sound.de                                     | S                    |
| 7                  | www.transportsysteme24.de                             | S                    |
| 8                  | www.scooterautoservice.de                             | T                    |
| 9                  | www.ecdgermany.de                                     | P                    |
| 10                 | www.kfzteile24.de                                     | P                    |
| 11                 | www.motointegrator.de                                 | P                    |
| 12                 | www.wagner-autoteile.de                               | P                    |
| 13                 | www.goodtires.de                                      | T                    |
| 14                 | www.reifendirekt.de                                   | T                    |
| 15                 | www.autoteile-werkzeuge.de                            | P                    |
| 16                 | www.winnerbatterien.de                                | S                    |
| 17                 | www.adapter-universe.de                               | S                    |
| 18                 | www.autodoc.de  | P                    |
| 19                 | www.mks-autoteile.de                                  | P                    |
| 20                 | www.qp24.de   | P                    |
| 21                 | www.batterie24.de                                     | S                    |
| 22                 | www.autoteile-preiswert.de                            | P                    |
| 23                 | www.myparto.com                                       | P                    |
| 24                 | www.ad-tuning.de                                      | S                    |
| 25                 | www.nbparts.de  | P                    |

<sup>\*1</sup> All eBay shops of the respective provider were taken into account in the ranking.

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with Marketplace activities
- Company ranking: Summary at company level

## AA-STARs Amazon shop ranking

TOP 25 Amazon shops (according to revenue) in Germany that operate a proprietary online shop as well. The 1,590 online shops in the AA-STARs Index run 264 Amazon shops in total, which is equivalent to annual trade revenue of €213 million, of which the TOP 25 account for 50%.

The TOP 25 AA-STARs Amazon stores report annual revenue of **€107 million**.

**19%** of the companies generate direct sales on **Amazon**.

| Ranking Index 2021 | TOP 25 Automotive aftersales Amazon shops | Range classification |
|--------------------|---|----------------------|
| 1                  | www.adapter-universe.de                   | S                    |
| 2                  | www.batterie-industrie-germany.de         | S                    |
| 3                  | www.detailmate.de                         | S                    |
| 4                  | www.auprotec.com                          | S                    |
| 5                  | www.autobatterienbilliger.de              | S                    |
| 6                  | www.eu-bay.de                             | S                    |
| 7                  | www.profitteile.de                        | P                    |
| 8                  | www.goodtires.de                          | T                    |
| 9                  | www.ecdgermany.de                         | P                    |
| 10                 | www.kfzteile24.de                         | P                    |
| 11                 | www.winnerbatterien.de                    | S                    |
| 12                 | www.walser-shop.com                       | S                    |
| 13                 | www.allpart24.de                          | P                    |
| 14                 | www.kofferraumwannen.de                   | S                    |
| 15                 | www.autoradio24.com                       | S                    |
| 16                 | www.lott.de                               | P                    |
| 17                 | www.se-anhaenger.de                       | S                    |
| 18                 | www.bandel-online.de                      | P                    |
| 19                 | www.ws-autoteile.com                      | P                    |
| 20                 | www.txtrade.de                            | S                    |
| 21                 | www.qp24.de                               | P                    |
| 22                 | www.tristarcolor.com                      | S                    |
| 23                 | www.crw-autoteile.de                      | S                    |
| 24                 | www.ars24.com                             | S                    |
| 25                 | www.atp-autoteile.de                      | P                    |

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with Marketplace activities
- Company ranking: Summary at company level

### Online shop ranking | Segment “parts”

The AA-STARs-4 ranking features 264 of the TOP 1,000 online shops in the Parts segment. There have only been a few minor changes compared to last year. Autodoc.de takes the top spot in Germany for the first time with one of its shops, while Pitstop climbs 6 places.

One of the many Autodoc online shops now tops the ranking.

Autodoc has 5 shops in the TOP 12.

| Ranking Index 2021 | Changes compared to last year | TOP 25 Automotive Aftersales Online shops   Parts | Sub-range           |
|--------------------|-------------------------------|---|---------------------|
| 1                  | +3                            | www.autodoc.de                                    | Car parts           |
| 2                  | -1                            | www.atu.de  | Full-range supplier |
| 3                  | -1                            | www.kfzteile24.de                                 | Car parts           |
| 4                  | -1                            | www.pkwteile.de                                   | Car parts           |
| 5                  | +1                            | www.autoteildirekt.de                             | Car parts           |
| 6                  | +1                            | www.bandel-online.de                              | Car parts           |
| 7                  | -2                            | www.atp-autoteile.de                              | Car parts           |
| 8                  | +1                            | www.autoersatzteile.de                            | Car parts           |
| 9                  | -1                            | www.leebmann24.de                                 | OE parts            |
| 10                 | -                             | www.motointegrator.de                             | Car parts           |
| 11                 | +2                            | www.skandix.de                                    | OE parts            |
| 12                 | -1                            | www.autoteileprofi.de                             | Car parts           |
| 13                 | +1                            | www.shop.ahw-shop.de                              | OE parts            |
| 14                 | -2                            | www.online-teile.com <sup>*1</sup>                | OE parts            |
| 15                 | +6                            | www.hubauer-shop.de                               | OE parts            |
| 16                 | -                             | www.kunzmann.de                                   | OE parts            |
| 17                 | +2                            | www.der-ersatzteile-profi.de                      | Car parts           |
| 18                 | +6                            | www.pitstop.de                                    | Car parts           |
| 19                 | +4                            | www.sportfahrwerk-billiger.de                     | Car parts           |
| 20                 | -2                            | www.baum-bmwshop24.de                             | OE parts            |
| 21                 | New entry                     | www.rosepassion.com <sup>*2</sup>                 | OE parts            |
| 22                 | -2                            | www.myparto.com                                   | OE parts            |
| 23                 | -6                            | www.autoteile24.de                                | Car parts           |
| 24                 | -2                            | www.volkswagen-classic-parts.de                   | OE parts            |
| 25                 | New entry                     | www.limora.com <sup>*2</sup>                      | Classic Car Parts   |

<sup>\*1</sup> Various providers of OE parts

<sup>\*2</sup> Foreign shop with a significant share of buyers from Germany

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with Marketplace activities
- Company ranking: Summary at company level

### Online shop ranking | Segment “tyres & rims”

The AA-STARS-4 ranking features 102 of the TOP 1,000 online shops in the Tyres & Rims segment. Reifendiscount.de (Fintyre) and Fritzreifen.de filed for insolvency and are no longer ranked in the TOP 25 this year. Reifen.de became a marketplace and is no longer run as an online shop. Goodwheel.de dropped 27 places and now ranks 42<sup>nd</sup>.

Reifenleader.de,  
Allereifen365.de,  
Original-räder.de and  
Quick.de are the  
shooting stars of the  
year in the AA-STARS  
Tyres & Rims ranking.

| Ranking Index 2021 | Changes compared to last year | TOP 25 Automotive Aftersales Online shops   Tyres & Rims |
|--------------------|-------------------------------|--|
| 1                  | -                             | www.reifendirekt.de                                      |
| 2                  | -                             | www.reifen.com   |
| 3                  | -                             | www.felgenshop.de  |
| 4                  | +1                            | www.felgenoutlet.de                                      |
| 5                  | +1                            | www.goodyear.eu  |
| 6                  | +7                            | www.reifenleader.de                                      |
| 7                  | +1                            | www.oponeo.de  |
| 8                  | +3                            | www.rsu.de *1  |
| 9                  | -2                            | www.tirendo.de   |
| 10                 | -                             | www.vergoelst.de   |
| 11                 | +1                            | www.onlineraeder.de                                      |
| 12                 | +4                            | www.reifentiefpreis.de                                   |
| 13                 | +9                            | www.quick.de   |
| 14                 | +3                            | www.premio.de  |
| 15                 | +23                           | www.allereifen365.de                                     |
| 16                 | +5                            | www.reifentiefpreis24.de                                 |
| 17                 | +3                            | www.reifen-pneus-online.de                               |
| 18                 | +8                            | www.wheelscompany.com                                    |
| 19                 | +4                            | www.werksraeder24.de                                     |
| 20                 | +7                            | www.Reifen-richtig-billig.de                             |
| 21                 | +4                            | www.shop.euromaster.de                                   |
| 22                 | -4                            | www.giga-reifen.de                                       |
| 23                 | -9                            | www.reifen24.de  |
| 24                 | +55                           | www.original-räder.de                                    |
| 25                 | 6                             | www.reifen-felgen.de                                     |

\*1 also includes a non-automotive after-sales segment, previously Reifensuche.com

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
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- Company ranking: Summary at company level

### Online shop ranking | Segment “specialized”

The Specialized segment is presented in detail for the first time. Until now, only the Tuning sub-segment has featured in a spotlight in AA-STARS 3. A year-on-year comparison is therefore not possible yet. The AA-STARS-4 ranking features 632 of the TOP 1,000 online shops in the Specialized segment.

E-mobility solutions and specialised providers – for car licence plates etc. – break into the TOP 25.

| Ranking Index 2021 | TOP 25 Automotive Aftersales Online Shops   Specialized  | Sub-range                      |
|--------------------|--|--------------------------------|
| 1                  | <a href="http://www.campingwagner.de">www.campingwagner.de</a> <sup>*1</sup>                         | Caravan                        |
| 2                  | <a href="http://www.kennzeichenking.de">www.kennzeichenking.de</a>                                   | Number plate                   |
| 3                  | <a href="http://www.mycarly.com">www.mycarly.com</a>   | Diagnostics                    |
| 4                  | <a href="http://www.kupplung.de">www.kupplung.de</a>   | Accessories                    |
| 5                  | <a href="http://www.kennzeichenbox.de">www.kennzeichenbox.de</a>                                     | Number plate                   |
| 6                  | <a href="http://www.wunschkennzeichen-reservieren.jetzt">www.wunschkennzeichen-reservieren.jetzt</a> | Number plate                   |
| 7                  | <a href="http://www.autobatterienbilliger.de">www.autobatterienbilliger.de</a>                       | Batteries                      |
| 8                  | <a href="http://www.magnatuning.com">www.magnatuning.com</a>   | Tuning                         |
| 9                  | <a href="http://www.seat-leon.de">www.seat-leon.de</a>   | Accessories                    |
| 10                 | <a href="http://www.ars24.com">www.ars24.com</a>   | Car Audio & Navigation Systems |
| 11                 | <a href="http://www.mobilityhouse.com">www.mobilityhouse.com</a>                                     | E-Mobility                     |
| 12                 | <a href="http://www.kufatec.com">www.kufatec.com</a>   | Retrofit                       |
| 13                 | <a href="http://www.enviam.de">www.enviam.de</a> <sup>*1</sup>                                       | E-Mobility                     |
| 14                 | <a href="http://www.shop.bmw.de">www.shop.bmw.de</a>   | Accessories                    |
| 15                 | <a href="http://www.racechip.de">www.racechip.de</a>   | Tuning                         |
| 16                 | <a href="http://www.chiptuning.com">www.chiptuning.com</a>   | Tuning                         |
| 17                 | <a href="http://www.gutschild.de">www.gutschild.de</a>   | Number plate                   |
| 18                 | <a href="http://www.batterie24.de">www.batterie24.de</a>   | Batteries                      |
| 19                 | <a href="http://www.carparts-expert.com">www.carparts-expert.com</a>                                 | Accessories                    |
| 20                 | <a href="http://www.sportauspuff-store.de">www.sportauspuff-store.de</a>                             | Tuning                         |
| 21                 | <a href="http://www.autoaid.de">www.autoaid.de</a>   | Diagnostics                    |
| 22                 | <a href="http://www.zulassungsstelle.de">www.zulassungsstelle.de</a>                                 | Number plate                   |
| 23                 | <a href="http://www.kroschke.de">www.kroschke.de</a>   | Number plate                   |
| 24                 | <a href="http://www.lederzentrum.de">www.lederzentrum.de</a>   | Care                           |
| 25                 | <a href="http://www.onlinefussmatten.de">www.onlinefussmatten.de</a>                                 | Accessories                    |

<sup>\*1</sup> also includes a non-automotive after-sales segment

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with Marketplace activities
- Company ranking: Summary at company level

### Overall ranking: AA-STARs Online shops

In the overall ranking of online shops, the TOP 25 B2C online shops in the three product ranges are shown according to customer frequency and our classification (P=Parts, T=Tyres & Rims, S=Specialized/Other). This makes it easy to recognise the largest shops, regardless of their range.

**Reifenleader.de** is the strongest shooting star in the overall online shop ranking (adjusted for the expanded range of the index).

| Ranking Index 2021 | Changes compared to last year | Full-Ranking TOP 25 Automotive Aftersales Online Shops | Assortment Allocation |
|--------------------|-------------------------------|--|-----------------------|
| 1                  | 4                             | www.autodoc.de   | P                     |
| 2                  | -1                            | www.atu.de   | P                     |
| 3                  | -1                            | www.kfzteile24.de                                      | P                     |
| 4                  | -1                            | www.pkwteile.de  | P                     |
| 5                  | -1                            | www.reifendirekt.de                                    | T                     |
| 6                  | 1                             | www.autoteiledirekt.de                                 | P                     |
| 7                  | 2                             | www.bandel-online.de                                   | P                     |
| 8                  | -2                            | www.atp-autoteile.de                                   | P                     |
| 9                  | Newcomer *2                   | www.campingwagner.de *1                                | S                     |
| 10                 | -2                            | www.reifen.com   | T                     |
| 11                 | 3                             | www.autoersatzteile.de                                 | P                     |
| 12                 | -2                            | www.leebsmann24.de                                     | P                     |
| 13                 | -2                            | www.felgenshop.de                                      | T                     |
| 14                 | -1                            | www.felgenoutlet.de                                    | T                     |
| 15                 | Newcomer                      | www.kennzeichenking.de                                 | S                     |
| 16                 | 0                             | www.motointegrator.de                                  | P                     |
| 17                 | Newcomer                      | www.mycarly.com  | S                     |
| 18                 | -3                            | www.goodyear.eu  | T                     |
| 19                 | 2                             | www.skandix.de   | P                     |
| 20                 | -2                            | www.autoteileprofi.de                                  | P                     |
| 21                 | Newcomer                      | www.kupplung.de  | S                     |
| 22                 | 11                            | www.reifenleader.de                                    | T                     |
| 23                 | -1                            | www.shop.ahw-shop.de                                   | P                     |
| 24                 | Newcomer                      | www.kennzeichenbox.de                                  | S                     |
| 25                 | Newcomer                      | www.wunschkennzeichen-reservieren.jetzt                | S                     |

\*1 also includes a non-automotive after-sales range

\*2 New entrants are primarily found in the S segment, also because this segment was mapped completely for the first time. Higher-placed new entrants must be taken into consideration when assessing the changes in ranking. For instance, Goodyear.eu retained its position after adjusting for this factor.

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
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- Company ranking: Summary at company level

### Multi-channel ranking: Shop | eBay | Amazon

The aggregate revenues of the individual online shops, compared to the revenues with eBay and Amazon, indicate the multi-channel strategies the individual shops are pursuing. 23 of the TOP 25 multi-channel traders have an active account with eBay. 17 of the TOP 25 have one on Amazon.

23 of the TOP 25 multi-channel traders are active on eBay. 17 of the TOP 25 use Amazon.

The annual multi-channel revenue of the TOP 25 shops across all 3 channels is €601 million.

On average, the TOP 25 multi-channel traders generate 46% of their revenue on eBay (10% Amazon, 44% online shop).

| Multi-channel ranking | TOP 25 Automotive Aftermarket Multi-channel | Assortment Allocation | Online shop ranking | eBay Shop ranking | Amazon Shop ranking |
|-----------------------|---|-----------------------|---------------------|-------------------|---------------------|
| 1                     | www.atp-autoteile.de                        | P                     | 8                   | 1                 | 25                  |
| 2                     | www.bandel-online.de                        | P                     | 7                   | 2                 | 18                  |
| 3                     | www.atu.de                                  | P                     | 2                   | 4                 | n/r <sup>*1</sup>   |
| 4                     | www.kfzteile24.de                           | P                     | 3                   | 10                | 10                  |
| 5                     | www.autodoc.de <sup>*2</sup>                | P                     | 1                   | 18                | 61                  |
| 6                     | www.reifendirekt.de                         | T                     | 5                   | 14                | n/r                 |
| 7                     | www.pkwteile.de                             | P                     | 4                   | n/r               | n/r                 |
| 8                     | www.campingwagner.de                        | S                     | 9                   | 27                | n/r                 |
| 9                     | www.autoteiledirekt.de                      | P                     | 6                   | n/r               | n/r                 |
| 10                    | www.ws-autoteile.com                        | P                     | 127                 | 3                 | 19                  |
| 11                    | www.reifen.com                              | T                     | 10                  | 50                | 53                  |
| 12                    | www.motointegrator.de                       | P                     | 16                  | 11                | 47                  |
| 13                    | www.lott.de                                 | P                     | 108                 | 5                 | 16                  |
| 14                    | www.ecdgermany.de                           | P                     | 133                 | 9                 | 9                   |
| 15                    | www.adapter-universe.de                     | S                     | 914                 | 17                | 1                   |
| 16                    | www.goodtires.de                            | T                     | 252                 | 13                | 8                   |
| 17                    | www.just-sound.de                           | S                     | 153                 | 6                 | 177                 |
| 18                    | www.winnerbatterien.de                      | S                     | 452                 | 16                | 11                  |
| 19                    | www.leebsmann24.de                          | P                     | 12                  | 162               | 65                  |
| 20                    | www.batterie-industrie-germany.de           | S                     | 162                 | 33                | 2                   |
| 21                    | www.transportsysteme24.de                   | S                     | 374                 | 7                 | n/r                 |
| 22                    | www.autobatterienbilliger.de                | S                     | 29                  | 80                | 5                   |
| 23                    | www.profitteile.de                          | P                     | 397                 | 30                | 7                   |
| 24                    | www.autoersatzteile.de                      | P                     | 11                  | n/r               | n/r                 |
| 25                    | www.scooterautoservice.de                   | T                     | n/r                 | 8                 | n/r                 |

<sup>\*1</sup> n/r = Shops with less than k€50 revenue/year are not included in the ranking.

<sup>\*2</sup> Autodoc.de is just one of the several shops run by Autodoc GmbH in Germany. Refer to the company ranking for the summary at company level.

## Results – TOP 25 rankings

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### Company ranking: Summary Multi-channel index

In addition to the previous rankings of individual shops, the company ranking shows which companies generate the largest trading volumes with various B2C, eBay and Amazon shops in Germany. The TOP 25 companies in Germany generate annual revenues of €684 million on the three channels.

Autodoc leads by an eight-figure margin, while ATP and Bandel are neck and neck in the chasing pack.

| Company ranking 2021 | TOP 25 Multi-channel Merchants in the Automotive Aftermarket |
|----------------------|--|
| 1                    | Autodoc GmbH   |
| 2                    | ATP Autoteile GmbH   |
| 3                    | BANDEL AUTOMOBILTECHNIK GmbH                                 |
| 4                    | A.T.U Auto-Teile-Unger GmbH & Co. KG                         |
| 5                    | kfzteile24 GmbH  |
| 6                    | Delticom AG  |
| 7                    | Scooter Autoservice GmbH                                     |
| 8                    | reifencom GmbH   |
| 9                    | Wagner eCommerce Group GmbH                                  |
| 10                   | W+S Autoteile GmbH   |
| 11                   | Rameder Anhängerkupplungen und Autoteile GmbH                |
| 12                   | CLEVERLOG-AUTOTEILE GmbH                                     |
| 13                   | Werner Lott Kfz.- und Industriebedarf GmbH                   |
| 14                   | Eris Car Design GmbH   |
| 15                   | Tradefox GmbH  |
| 16                   | DF Automotive GmbH & Co. KG                                  |
| 17                   | just-SOUND CarHifi, Christian Becker                         |
| 18                   | SIGA Batteries GmbH  |
| 19                   | BaSBa Batterien GmbH   |
| 20                   | Profiteile GmbH & Co. KG                                     |
| 21                   | Auto-Leebmann GmbH   |
| 22                   | BIG - Batterie-Industrie-Germany GmbH                        |
| 23                   | batterium GmbH   |
| 24                   | Q-Parts24 GmbH & Co. KG                                      |
| 25                   | International Parts Trading GmbH                             |

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with Marketplace activities
- Company ranking: Summary at company level

### Company ranking: Summarized multi-channel index

The multi-channel ranking (page 11) is always based on a single online store with its eBay and Amazon activities. How does the ranking change if we look at all of a company's activities on the channels? How many stores do the companies use?

| Company ranking 2021 | TOP 25 Multi-channel merchants in the Automotive Aftermarket | Own Online shops* <sup>1</sup> | eBay shops* <sup>1</sup> | Amazon shops* <sup>1</sup> |
|----------------------|--|--------------------------------|--------------------------|----------------------------|
| 1                    | Autodoc GmbH   | 14                             | 3                        | 1                          |
| 2                    | ATP Autoteile GmbH   | 1                              | 2                        | 1                          |
| 3                    | BANDEL AUTOMOBILTECHNIK GmbH                                 | 1                              | 1                        | 1                          |
| 4                    | A.T.U Auto-Teile-Unger GmbH & Co. KG                         | 1                              | 3                        | 1                          |
| 5                    | kfzteile24 GmbH  | 5                              | 2                        | 1                          |
| 6                    | Delticom AG  | 12                             | 6                        | 0                          |
| 7                    | Scooter Autoservice GmbH                                     | 4                              | 2                        | 1                          |
| 8                    | reifencom GmbH   | 2                              | 2                        | 1                          |
| 9                    | Wagner eCommerce Group GmbH                                  | 1                              | 1                        | 0                          |
| 10                   | W+S Autoteile GmbH   | 1                              | 1                        | 1                          |
| 11                   | Rameder Anhängerkupplungen und Autoteile GmbH                | 5                              | 3                        | 1                          |
| 12                   | CLEVERLOG-AUTOTEILE GmbH                                     | 1                              | 2                        | 1                          |
| 13                   | Werner Lott Kfz.- und Industriebedarf GmbH                   | 1                              | 4                        | 1                          |
| 14                   | Eris Car Design GmbH   | 1                              | 2                        | 1                          |
| 15                   | Tradefox GmbH  | 1                              | 1                        | 1                          |
| 16                   | DF Automotive GmbH & Co. KG                                  | 3                              | 1                        | 0                          |
| 17                   | just-SOUND CarHifi, Christian Becker                         | 1                              | 1                        | 1                          |
| 18                   | SIGA Batteries GmbH  | 3                              | 1                        | 1                          |
| 19                   | BaSbA Batterien GmbH   | 2                              | 2                        | 2                          |
| 20                   | Profiteile GmbH & Co. KG                                     | 2                              | 2                        | 1                          |
| 21                   | Auto-Leebmann GmbH   | 1                              | 1                        | 1                          |
| 22                   | BIG - Batterie-Industrie-Germany GmbH                        | 1                              | 1                        | 1                          |
| 23                   | batterium GmbH   | 1                              | 1                        | 1                          |
| 24                   | Q-Parts24 GmbH & Co. KG                                      | 2                              | 2                        | 1                          |
| 25                   | International Parts Trading GmbH                             | 1                              | 1                        | 1                          |

\*<sup>1</sup> The figures shown here do not reflect the rank, but the number of stores.

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
- Multi-channel ranking: Online shops with Marketplace activities
- Company ranking: Summary at company level

### Company ranking: Summarized multi-channel index

The following table shows the company rank per channel for online shop, eBay and Amazon <sup>\*1</sup>. For clarification: With its 3 eBay shops (page 13), Autodoc comes 17<sup>th</sup> in the eBay company ranking, for example.

| Company ranking 2021 | TOP 25 Multi-channel retailer in the Automotive Aftermarket | Own Online shops | eBay shops | Amazon shops |
|----------------------|---|------------------|------------|--------------|
| 1                    | Autodoc GmbH  | 1                | 17         | 61           |
| 2                    | ATP Autoteile GmbH  | 6                | 1          | 25           |
| 3                    | BANDEL AUTOMOBILTECHNIK GmbH                                | 5                | 2          | 18           |
| 4                    | A.T.U Auto-Teile-Unger GmbH & Co. KG                        | 2                | 5          | k.R.         |
| 5                    | kfzteile24 GmbH   | 3                | 11         | 10           |
| 6                    | Delticom AG   | 4                | 6          | k.R.         |
| 7                    | Scooter Autoservice GmbH                                    | 227              | 3          | 8            |
| 8                    | reifencom GmbH  | 8                | 27         | 54           |
| 9                    | Wagner eCommerce Group GmbH                                 | 7                | 28         | k.R.         |
| 10                   | W+S Autoteile GmbH  | 119              | 4          | 19           |
| 11                   | Rameder Anhängerkupplungen und Autoteile GmbH               | 15               | 9          | 97           |
| 12                   | CLEVERLOG-AUTOTEILE GmbH                                    | 13               | 12         | 48           |
| 13                   | Werner Lott Kfz.- und Industriebedarf GmbH                  | 103              | 7          | 16           |
| 14                   | Eris Car Design GmbH  | 125              | 10         | 9            |
| 15                   | Tradefox GmbH   | 814              | 16         | 1            |
| 16                   | DF Automotive GmbH & Co. KG                                 | 9                | 201        | k.R.         |
| 17                   | just-SOUND CarHifi, Christian Becker                        | 140              | 8          | 176          |
| 18                   | SIGA Batteries GmbH   | 242              | 15         | 11           |
| 19                   | BaSBa Batterien GmbH  | 33               | 18         | 34           |
| 20                   | Profiteile GmbH & Co. KG                                    | 93               | 29         | 7            |
| 21                   | Auto-Leebmann GmbH  | 10               | 156        | 65           |
| 22                   | BIG - Batterie-Industrie-Germany GmbH                       | 152              | 34         | 2            |
| 23                   | batterium GmbH  | 26               | 76         | 5            |
| 24                   | Q-Parts24 GmbH & Co. KG                                     | 208              | 20         | 21           |
| 25                   | International Parts Trading GmbH                            | 50               | 23         | 38           |

<sup>\*1</sup> This ranking is NOT the same as the shop rankings and represents instead the consolidated company ranking (for online shop, eBay and Amazon).

Scooter Autoservice GmbH even comes 7<sup>th</sup> in the company ranking with its marketplace strategy.

## Results – TOP 25 rankings

- Marketplace shop ranking: eBay | Amazon
- Segment ranking: Online shops for segments parts | tyres & rims | specialized
- Overall shop ranking: Summary of the segments in an overall ranking
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- Company ranking: Summary at company level

### Company ranking: Summarized multi-channel index

The revenue share per channel vividly illustrates the company's principal focus and provides an initial impression of the multi-channel strategy.

Autodoc, DF-Automotive and Auto-Leebmann place a clear focus on their own online shops

eBay is the channel with the highest revenues for 14 of the TOP 25 multi-channel companies. Only 8 generate their highest revenues with their own shops and only 3 with Amazon.

| Company ranking 2021 | TOP 25 Multi-channel retriailer Automotive Aftermarket | Own Online Shops | eBay Shops | Amazon shops |
|----------------------|--|------------------|------------|--------------|
| 1                    | Autodoc GmbH   | 92%              | 7%         | 1%           |
| 2                    | ATP Autoteile GmbH                                     | 20%              | 77%        | 3%           |
| 3                    | BANDEL AUTOMOBILTECHNIK GmbH                           | 23%              | 73%        | 4%           |
| 4                    | A.T.U Auto-Teile-Unger GmbH & Co. KG                   | 70%              | 30%        | 0%           |
| 5                    | kfzteile24 GmbH  | 71%              | 19%        | 10%          |
| 6                    | Delticom AG  | 67%              | 33%        | 0%           |
| 7                    | Scooter Autoservice GmbH                               | 2%               | 76%        | 22%          |
| 8                    | reifencom GmbH.  | 69%              | 25%        | 6%           |
| 9                    | Wagner eCommerce Group GmbH                            | 73%              | 27%        | 0%           |
| 10                   | W+S Autoteile GmbH                                     | 5%               | 81%        | 14%          |
| 11                   | Rameder Anhängerkupplungen und Autoteile GmbH          | 32%              | 65%        | 3%           |
| 12                   | CLEVERLOG-AUTOTEILE GmbH                               | 42%              | 50%        | 8%           |
| 13                   | Werner Lott Kfz.- und Industriebedarf GmbH             | 6%               | 74%        | 19%          |
| 14                   | Eris Car Design GmbH                                   | 6%               | 63%        | 31%          |
| 15                   | Tradefox GmbH  | 0%               | 50%        | 50%          |
| 16                   | DF Automotive GmbH & Co. KG                            | 97%              | 3%         | 0%           |
| 17                   | just-SOUND CarHifi, Christian Becker                   | 6%               | 93%        | 1%           |
| 18                   | SIGA Batteries GmbH                                    | 4%               | 59%        | 37%          |
| 19                   | BaSBa Batterien GmbH                                   | 26%              | 60%        | 14%          |
| 20                   | Profiteile GmbH & Co. KG                               | 9%               | 42%        | 48%          |
| 21                   | Auto-Leebmann GmbH                                     | 86%              | 6%         | 8%           |
| 22                   | BIG - Batterie-Industrie-Germany GmbH                  | 6%               | 38%        | 56%          |
| 23                   | batterium GmbH   | 33%              | 13%        | 53%          |
| 24                   | Q-Parts24 GmbH & Co. KG                                | 15%              | 63%        | 22%          |
| 25                   | International Parts Trading GmbH                       | 20%              | 64%        | 15%          |

## Background information on the study

- The objective
- The market structure
- Research of online shops and marketplaces
- Calculation of the ranking

If you can't find something online, it will not make any money online.

### The objective

Unlike other studies, Speed4Trade takes a closer look at the actual size of the online shop market in the automotive after-market. From the perspective of its real target: the buyer!

We believe that the best way to do this is to view the market from an online shopper's point of view and not from the corporate perspective. It follows, therefore, that visibility on the net is a key driver of online success. We used Google, marketplaces, price comparison sites and other freely accessible sources to identify the shops. Basically any resource where a shop might be visible to a buyer.

The **benefit** of our survey method: So far, studies have left a gap between real market data and reported study data. We dispense with an analysis of company indicators and interviews – with all their limitations – and concentrate instead on what the online customer actually sees. A bottom-up approach, one might say.

**Kindly take note** that this report does not present the complete online market with all of its touch points, but concentrates instead on online, eBay and Amazon shops in the B2C sector. Smartphone apps and B2B shops are not yet included. Various editions investigate marketplaces as “spotlights”.

### The annual index

Status quo is good – change is better.

We have changed the AA-STARs review period from a semi-annual to an annual review for the first time in this edition. **The review period for this study is September 2020 to August 2021.** This means that changes are still easy to be tracked and provide important input for company planning.

## Background information on the study

- The objective
- The market structure
- Research of online shops and marketplaces
- Calculation of the ranking

### The market structure

It is sensible to divide the automotive after-market into three primary range segments in order to analyse online business: Parts, Tyres & Rims and Specialized.

These segments can also be broken down according to vehicle types. This study exclusively investigates **passenger cars (including light vehicles)**.

#### Parts

Shops that allow users to select a vehicle and search for a suitable spare part, among other things, are assigned to this segment. This applies also to full-range providers. Shops are not assigned to several segments. Kindly take note that the assignment is made based on the visual presentation to customers as well.

#### Tyres & Rims

This segment primarily contains tyres, rims, complete wheels and relevant accessories. Tyres & Rims have featured since the second edition of the study paper.

#### Specialized

The range is also described as “Others”. It includes all areas that could also count as accessories. They are items that, unlike car parts and rims, often do not need an exact match with a vehicle. Among others, specialised shops are found in the Specialized/Others range.

- Vehicle accessories, including car hi-fi, e-mobility, number plates and others
- Oils, lubricants and consumables, care products, lacquers
- Tuning
- Repair shop accessories and others

The 4<sup>th</sup> edition of AA-STARS provides a detailed description of the Specialized segment for the first time.

**NEW!**  
The full *Specialized*  
range is now  
included in an AA-  
STARS report for the  
first time.

## Background information on the study

- The objective
- The market structure
- Research of online shops and marketplaces
- Calculation of the ranking

## Research of online shops and marketplaces

### Online shop research

The research is performed according to the following procedure:

- Identification and classification of relevant shops
- Inclusion in the index
- Inclusion in the ranking

**1,590** automotive after-market shops were included in the **AA-STARS index**.

So far, over 10,000 URLs have been reviewed for this study paper, of which 2,185 were identified as shops. 1,590 online shops that satisfied the following criteria were included in the index:

- B2C shop, active and functional
- Automotive after-sales range (segment P, T or S)
- After-sales range for passenger cars/light vehicles
- $\geq 20\%$  of the buyers from Germany

**998** automotive after-market shops were included in the **AA-STARS ranking** and each generate annual turnover of at least **k€50**.

At the same time, **37%** of the shops in the index generate revenue of **less than k€50 per year**.

| Segment      | Inclusion in the index (number of shops) | Inclusion in the ranking (number of shops) |
|--------------|--|--|
| Parts        | 442                                      | 264  |
| Tyres & Rims | 221                                      | 102  |
| Specialized  | 927                                      | 632  |
|              |  |  |
| <b>SUM</b>   | <b>1.590</b>                             | <b>998</b>                                 |

The shop's total range is always taken into account to calculate its revenue that is relevant for ranking. The range is not broken down.

## Background information on the study

- The objective
- The market structure
- Research of online shops and marketplaces
- Calculation of the ranking

### Research of online shops and marketplaces

The activities of the indexed online shops on eBay and Amazon were researched, and information about their shops on the two platforms collected. An algorithm developed by Speed4Trade calculates the annual revenues generated by these eBay/Amazon shops<sup>\*1</sup>, which are then used for the ranking.

Note:

The gross merchandizing volume (GMV) of eBay and Amazon in product groups that are relevant to automotive after-sales is significantly higher than the accumulated revenues that we identified via the marketplace shops run by traders with a proprietary online shop in Germany. This is mainly due to two parameters:

- There are a large number of traders who do not run their own online shop beyond marketplace activities. We call this group “marketplace pure players”. Their revenues are not included in our study. A proprietary online shop is a requirement for inclusion.
- Many traders do not sell directly on Amazon and instead use the company’s vendor management programme. They are therefore in a B2B relationship with Amazon and entrust the majority of B2C business to Amazon. This is a reason for the small number of shops compared to eBay. Our index does not include the trading volume that Amazon generates itself. But it is nonetheless significant and might even make up the difference to the trading volume with eBay. It would hence be accurate to describe Amazon itself as one of the largest automotive after-sales traders on the Amazon marketplace.

**eBay** remains the leading B2C platform on the German automotive after-market.

| Marketplace | Number of stores |
|-------------|------------------|
| eBay        | n = 884          |
| Amazon      | n = 263          |

<sup>\*1</sup> In its premium offer, our partner Wolk after sales experts even analyses the revenues generated in the respective product categories and with individual products (incl. prices) for the EU region.  
<https://wolk-aftersales.com/der-autoteile-e-commerce-kanal-im-ueberblick/?lang=en>

## Background information on the study

- The objective
- The market structure
- Research of online shops and marketplaces
- Calculation of the ranking

A calculated ranking depicts the trading volume more accurately than interviews with companies.

## Calculation of the ranking

Speed4Trade has developed several **algorithms** to calculate the gross merchandizing volume (GMV).

The Speed4Trade algorithms were used to calculate the revenues generated by the individual online shops as a best possible approximation. In places, the algorithms use different average values for the automotive after-market, which are based on real-time analyses.

**Regression analyses** are used to minimise errors. The use of averages means that the revenues for each individual shop may deviate upwards or downwards, but they do permit an accurate appraisal of the overall market size.

### Trading volume for Germany

AA-STARS collects current figures for trading volumes in Germany. This delimitation by country does not always yield clear results for B2C trade, as country borders become blurred. All shops consistently have a percentage of sales from a country other than Germany. It is rare for B2C shops to deliver only in Germany. It is also unusual in B2C trade to accept only buyers with a registered, delivery or billing address in Germany. The index does not include any shops with less than 20% buyers in Germany. Revenues generated by shops with  $\geq 20\%$  buyers in Germany were considered in full, so including purchases from abroad.

**Kindly take note** that only the individual online shops and not the company's figures are included and presented, depending on the ranking. Companies tend to use a large number of channels (multi- or omni-channel) for their online trading activities and frequently have several online shops and occasionally even apps. There is often an online B2B segment as well, although it will have little external visibility.

It follows, therefore, that the top-ranking online shop will not always belong to the most successful company on the market. There are companies with several shops in the TOP 25.

Shops that generate less than k€50 GMV per year are included in the index but disregarded in the individual rankings.

## What do you need? Our promise!

- Which data do you need to make better decisions?
- Which tasks do you want to complete using the data?
- How do you identify the benefit?
- Our offer: Proceed as a team

## What do you need? Our promise!

The AA-STARS index focuses on a small section of the automotive after-market <sup>\*1</sup> – primarily B2C online shops in Germany stocking a range of spare parts, wheels and accessories for passenger cars.

There are many other areas of the market and issues that we have not addressed in this study paper or which we do not even know.

### How to Make Better Decisions Together

Feel free to enquire about other market information that you require. We will do our best to provide you with targeted and meaningful analyses. Our concern at all times is to identify the issues that really matter to you. We would like to interview you to find out which problems you can solve with other analyses in your professional field and which specific benefits and values this would deliver for you.

[Yes, let's talk!](#)

Click on the button to send us a request to discuss your data requirements – with no further commitment. Thanks for your interest!

<sup>\*1</sup> We generally only show you a small excerpt (e.g. the TOP 25) in our AA-STARS study. Please contact us if you would like access to more data.

## Publisher | Responsible für the content

- About Speed4Trade
- Disclaimer
- Imprint and contact

The Speed4Trade vision: Reducing the distance to customers through digital solutions.

### About Speed4Trade

Speed4Trade GmbH develops software for digital trading. The e-commerce software house is a specialist for setting up digital platforms such as online shops, marketplaces or service portals and connecting them to the current IT systems. Focusing on the automotive after-market, Speed4Trade helps manufacturers and traders from all sectors to create digital business models with automated processes. True to the vision of "Reducing the distance to customers through digital solutions", Speed4Trade gives B2B and B2C providers direct access to more customers – in a secure, reliable and efficient setting. To do this, the company builds on its proprietary and scalable software products and establishes highly performant interfaces. The experienced software architects support customers through all phases of a project, from the initial brainchild to successful completion. An international player, the company is located in Altenstadt a. d. Waldnaab in Bavaria and has 100 employees.

[www.speed4trade.com](http://www.speed4trade.com)

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