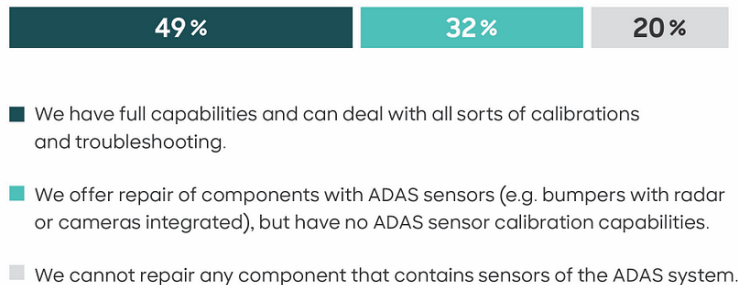
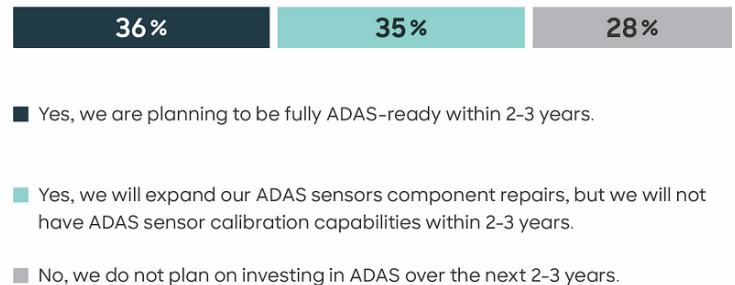


ADAS repair capabilities are expanding, but future investment intent is uneven. Many garages remain hesitant to commit fully.

How comfortable is your garage/workshop with the replacement of parts related to Advanced Driver-Assistance Systems (ADAS) (e.g., exchange of sensors, radars, LiDARs, cameras)? [%]



Does your garage/workshop plan on expanding ADAS capabilities over the next 2-3 years to cover all clients' needs? [% of respondents]



Source Roland Berger

Dec 11, 2025 09:35 CET

Independent repair shops are struggling with rising cost pressures, and half of them are failing to keep up with advanced driver assistance systems

Study Download

- In 11 out of 13 markets surveyed, consumers spent less in real terms on vehicle maintenance and repair in 2025 than in 2024
- 57% of car owners (+14% year on year) prefer to buy spare parts from low-cost brands rather than the original equipment

- manufacturer
- Convenience services are now a key differentiator – Vehicle pick-up and drop-off services have gained hugely in importance

Munich, December 2025: The global automotive aftermarket (service, maintenance and repair) is navigating a profound transformation: While new car sales are stagnating in many markets, the average age of vehicles is rising steadily. The demand for repairs and maintenance is therefore growing – but under completely different circumstances. This is among the findings of the recent "Automotive Aftermarket Pulse 2025" study by consultants Roland Berger, which surveyed 600 workshops and 6,000 car owners in 13 of the world's most important automotive markets.

Price sensitivity drives a quality shift

The study findings reveal a clear shift toward cheaper parts alternatives: 57% of consumers now prefer to buy spare parts from the independent aftermarket over original equipment (OE) parts – an increase of 14 percentage points year on year. This trend is particularly pronounced in rural areas and among drivers of entry-level vehicles. "2025 saw an increase in price sensitivity among consumers. Rising repair costs are pushing them toward cheaper parts alternatives," said Neury Freitas, Partner at Roland Berger. At the same time, real spending on service, maintenance and repairs fell in most markets. Only in the US and Mexico did nominal spending increase – but that was driven by price inflation, not higher consumption.

Technology gap: ADAS capabilities are a struggle for repair shops

The study reveals a key challenge for the independent aftermarket when it comes to advanced driver assistance systems (ADAS): 47% of workshops had to turn down ADAS-related repairs in the past twelve months due to insufficient capabilities. The main reason cited by 58% of surveyed workshops was a lack of calibration equipment. "The high investment costs involved in being able to do ADAS repairs are excluding many independent workshops and concentrating revenue and customer loyalty in OE-controlled channels," said Wegner.

Convenience is the new differentiator

A surprising finding of the study is that independent repair shops are increasingly relying on convenience services to help them gain a competitive advantage. Garages in urban areas in particular are increasingly offering pick-up and drop-off services. "Convenience services offered by workshops, such

as vehicle pick-up and drop-off, can be an important tool to attract new customer groups like fleets," said Freitas. "Workshops that do not invest in this area are missing out on big opportunities in new customer segments." The study illustrates that such services are already well established in Europe and the Middle East and are catching on in the Americas. China is particularly open to newer service types such as mobile services (26%).

Online purchasing is expanding, especially in B2B

While B2C customers are increasingly turning away from online purchasing – 25% of consumers who have bought automotive parts online would not do so again – online sourcing is booming in the B2B sector. Over 80% of workshops in markets such as the US, Germany and the UK already purchase a significant proportion (>20%) of their spare parts online. The majority expect this share to increase further in the next two to three years.

About the study

Roland Berger's "Automotive Aftermarket Pulse 2025" study is based on a survey of 600 garages/workshops and 6,000 private car owners in 13 of the world's most important automotive markets: Belgium, Brazil, Canada, China, France, Germany, Italy, Mexico, the Netherlands, Spain, Turkey, the UK and the USA.

Roland Berger is one of the world's leading strategy consultancies with a wide-ranging service portfolio for all relevant industries and business functions. Founded in 1967, Roland Berger is headquartered in Munich. Renowned for its expertise in transformation, innovation across all industries and performance improvement, the consultancy has set itself the goal of embedding sustainability in all its projects. Roland Berger generated revenues of around 1 billion euros in 2024.

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