

Bodywork, Paintwork and Auto glass

Collision repair:
sales up despite claims
levelling off

THE COLLISION REPAIR MARKET
IN FRANCE IS STABLE IN
VOLUME TERMS

1.8
million

claims were declared
economically repairable.

Sources: SRA Sécurité et Réparation Automobile, 2023

180,000
cars

of claims classified as
irreparable.

Which puts the collision repair
market paid for by insurers at
around 2 million claims a year.



A MARKET EXPERIENCING HIGH GROWTH BY VALUE IN 2023

While the volume of the collision repair market is stagnating, its value is rising sharply due to a higher average cost of operations.

According to insurers, is around € 1,800 excluding VAT.

**This equates to a total repairable market of around
€3,24 billion excluding VAT**

The increase in the average cost of collision repairs can be attributed to changes in vehicle design (widespread use of on-board electronics, special steels and aluminium) and to spare parts prices that have been rising since 2019.

+7%*

higher average
cost of operations
between 2022
and 2023

+ 26,2%
between 2019
and 2023



SPARE
PARTS

+7.5%

51,8% of the average
collision repair
bill in 2023
up 7.5% year-on-year



PAINT
INGREDIENTS

+8.6%

in one year,
making them
10.5% of the repair cost



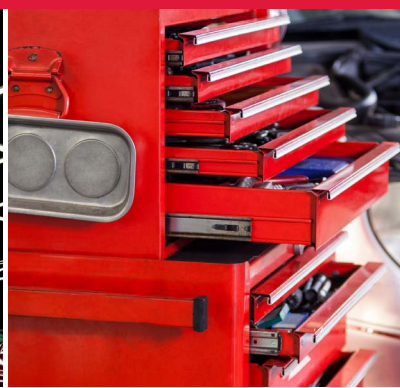
LABOUR COSTS

+5.9%

37.7%
of the average bill

**Against this backdrop of soaring costs for insurers, a number of key
developments are impacting the bodywork profession.**

*Source: SRA Sécurité et Réparation Automobile - 2023



Productivity, sobriety and functionality, the keywords in the business

KEEPING LABOUR COSTS UNDER CONTROL IS ESSENTIAL

This means it is important to invest in productivity solutions:

- Smart repair solutions (using ultra-fast-drying products);
- Latest-generation ultra-violet drying equipment;
- Functionally designed workplaces.

MANUFACTURERS ARE ALSO INNOVATING IN OPTIMISED PAINT INGREDIENT PREPARATION

Quantities can be finely controlled, for example, with automated mixing machines and scales connected to smart spectrophotometers. These ultra-technological paints have seen their price per litre soar, which in turn calls for productivity gains and the use of equipment to achieve these.

Also worth remembering is the **essential role played by paint booths**: the latest generations are much more energy-efficient than those of a decade ago. Additionally, they can be plugged into workshop management and planning software, and are functionally designed to allow technicians to move around much more smoothly.

Reusable parts: a key factor in cost efficiencies

While the recent introduction of an open market for captive parts (in 2023) has not yet brought about the competition in bodywork parts prices that Brussels was hoping for, other levers are being used by insurers and the bodywork profession to try to curb this galloping inflation. One of these is reusable parts: a category comprising second hand parts, remanufactured parts, and used replacement parts. The 'reservoir' of available parts is growing every year, and insurers are strongly encouraging their use.

THE PROPORTION
OF REUSABLES
IN 2024

5%

parts replaced
amounted

7.5%

for replacements on vehicles
over 5 years old

All the indicators to do with reusable parts take-up have been positive over the past five years. Authorised treatment facilities (scrapyards) have made major efforts to salvage more parts from end-of-life vehicles, and it is vital to spread the word about their offerings.

14-18 OCT. 2025 | PARIS EXPO PORTE DE VERSAILLES

**BODYWORK
PAINTWORK
VILLAGE**

EQUIP AUTO

FFC

COMING UP AT THE SHOW

La FFC* will be organising the 7th edition of the Bodywork and Paintwork village at EQUIP AUTO Paris 2025. Specialist equipment manufacturers from the bodywork profession will be on hand during the five days of the show to present their innovations.

* French Bodywork Federation

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**CIRCULAR
ECONOMY
VILLAGE**

EQUIP AUTO

The Circular Economy Village at EQUIP AUTO 2025 will contribute significantly to this cause.



Auto glass on a healthy trend

THE AUTO GLASS
MARKET IT'S:

2.7
million
operations

€1.7*
billion excluding VAT
sales

€ 630 excluding VAT
Average cost of an auto glass repair
in 2022

This is a dynamic market with strong competition on the ground, with average costs (and margins) rising sharply.

+42%
between 2018 and 2023**

* Source: TCG Conseil for Mobilians, 2022

** Source: SRA Sécurité et Réparation Automobile.

Auto glass is also becoming increasingly technical and technological

Anti-frost, heated, electrochromic, acoustic, heat-reflecting, hydrophobic and head-up display windcreens.

The widespread use of windscreen cameras for road sign recognition and lane assistance also means that they have to be recalibrated each time the windscreen is replaced.

In contrast, the increasing practice of offering freebies to motorists to draw them into a windscreen workshop triggered intense controversy at the end of 2024.

The automotive glazing market will continue to be a hot topic in 2025

