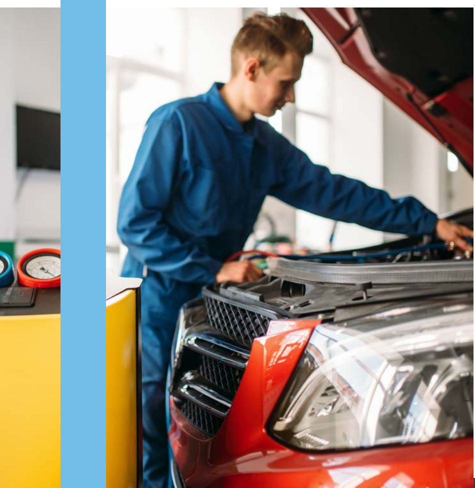
Manufacturer and all-makes aftersales networks

Roadworthiness testing

All-makes repairers, or the independent garage sector

(repair shops, dealers, body shops, heavy duty vehicle garages)



Independent maintenance and servicing businesses are made up of:

- all-makes mechanical and repair shops (known as MRA in French);
- brand representatives ('agents de marques') whose all-makes business often accounts for more than a third of their aftermarket sales;
- body shops, which cater to all makes for collision repair.

As all-makes market players, they are important customers for the distributors of auto parts and services.

53,000 companies

150,000 employees

They can work both on the most recent vehicles (maintaining the validity of the constructor warranty) and on older vehicles.

ALL-MAKES REPAIR SHOPS, PLAYERS IN THE CIRCULAR ECONOMY

These MRA and agents – the latter for their all-makes activity – are consumers' favourite choice when it comes to servicing older vehicles.

VEHICLES ON THE ROAD, IN FRANCE*:

38.7 MILLION
Personal cars

Average age
10.5
YEARS

1/3 are **+15** years

** Source: ministry for the ecological transition and territorial cohesion*

MULTI-SPECIALISTS ON ALL MAKES

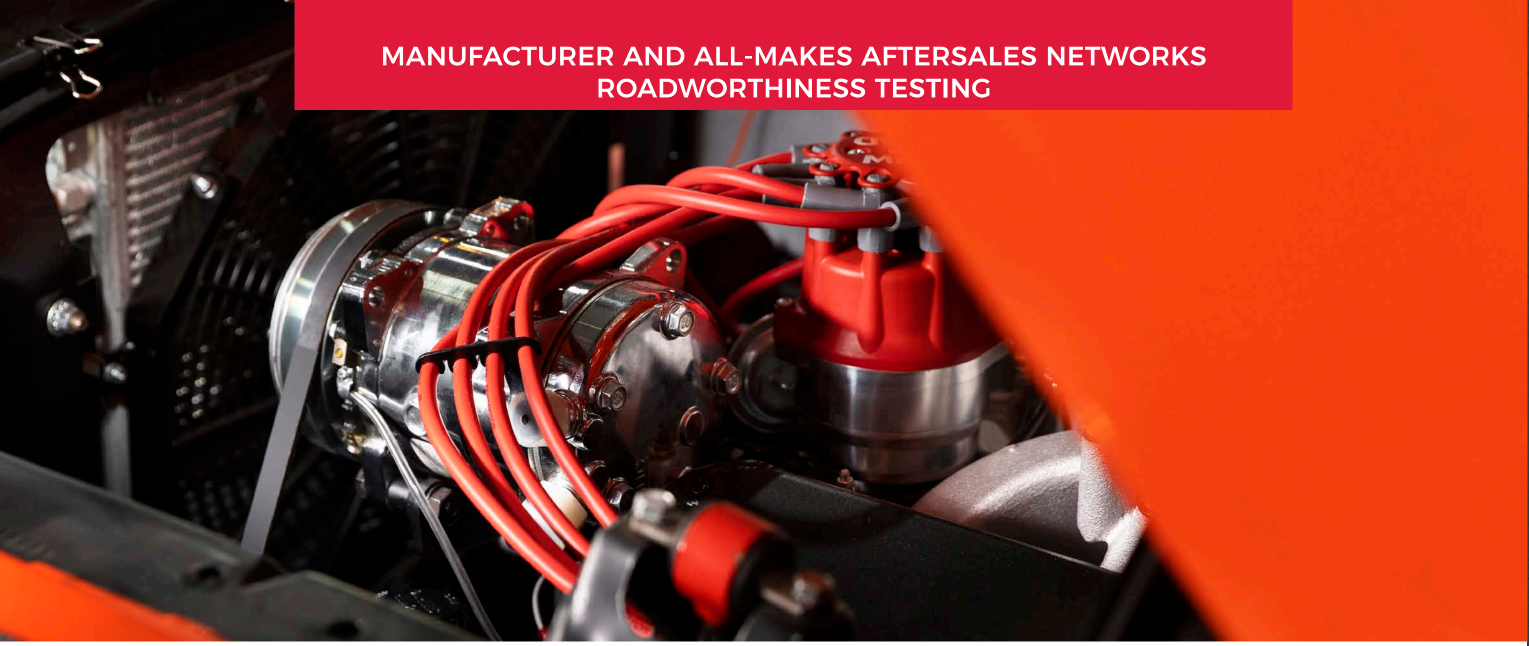
Their proximity, their qualification as multi-specialists on all makes, and their outstanding value for money on technical operations make these businesses natural promoters of the circular economy. They have the ability to keep vehicles' polluting gas emission levels down and bring up to standard the vehicles that present defects deemed serious (such as pollution) or potentially critical for the roadworthiness test.

ALL-MAKES BODY SHOPS

are the only players on the collision repair market capable of saving badly damaged vehicles from the scrapyard. By using so-called circular economy parts, and by straightening or repairing parts and components instead of replacing them, they provide healthy competition for manufacturer dealer networks. The latter are financially compelled to sell new parts, and in many cases cannot save a vehicle for a cost that the insurers find economically acceptable. Each time an all-makes body shop avoids writing off a vehicle, it contributes to the long-term durability of the vehicle parc, and as such are unavoidable players in sustainable development.

PARTS AND SERVICES DISTRIBUTOR

For very technical operations on modern vehicles (such as replacing an ECU, technological parts such as dashboard panels, reprogramming procedures, electronic pairing, software updates), both repair shops and body shops call on the assistance of their parts and services distributor partners. Through top-class training, but also with the help of their technical platforms (of which there about 500 in France), these can either pass on skills or take over the repair task (remotely or on site) to ensure the repair is done according to standard practice. This two-tiered expertise maintenance system remains entirely pertinent to remain competitive with dealer networks. It helps keep vehicles fitted with modern technology in a proper state of operation throughout their lifespans. A close partnership between repair shops, distributors and parts suppliers is also a crucial organisation in view of the energy transition and its many challenges.



Networks to deal with the issues

Most of the all-makes MRA in France in 2025 are part of a network run by parts and services distributors.
While the networks were initially chains whose goal was to obtain the loyalty of repair shop customers to distributors, on the turn of the 2010s they became unavoidable concepts of professionalisation aimed at the customers of distributors.

+9,000
all-makes repair
shops operate under the brand of a network run by parts and services distributors at the end of 2023

2/3
of all-makes chains
in France are thus run by independent parts and service distributors

THE LARGEST CHAINS

For example AD Expert or Autoprimo, AAG Top Garage or Precisium Garage, Bosch Car Service, provide their MRAs with:

- Solutions to obtain **training** (e.g.: Institut AD),
- **Original circular economy parts** propositions ('BacktoCar' at AAG),
- In-depth technical training courses (e.g.: at Bosch Car Service),
- **Business management** optimisation aids
- Marketing strategies including **service digitalisation** (e.g. online appointment booking)

MANUFACTURERS

Too, have launched and now run national all-makes networks (Stellantis Eurorepar; Renault Motrio; Ford Motorcraft);

THEY BOAST A TOTAL OF
2,700
garages under their brands.

Other chains: fast fitters, tyre sellers and auto centres

#1 . THE FIRST AUTO CENTRE CHAINS

Were born in France in 1970 with Norauto (its first auto centre opened in the Lille suburb of Englos) and Feu Vert (first centre in Dardilly, Lyon, also in 1970). The Mobivia group, which manages the chains Norauto, Midas, Carter-Cash, Auto5 in Belgium and ATU in Germany, is the European leader in auto centres. These chains offer both parts and accessories for sale in a shop and all-makes maintenance services in a workshop. The operations are limited to regular maintenance, while some centres can go as far as replacing a drive belt.

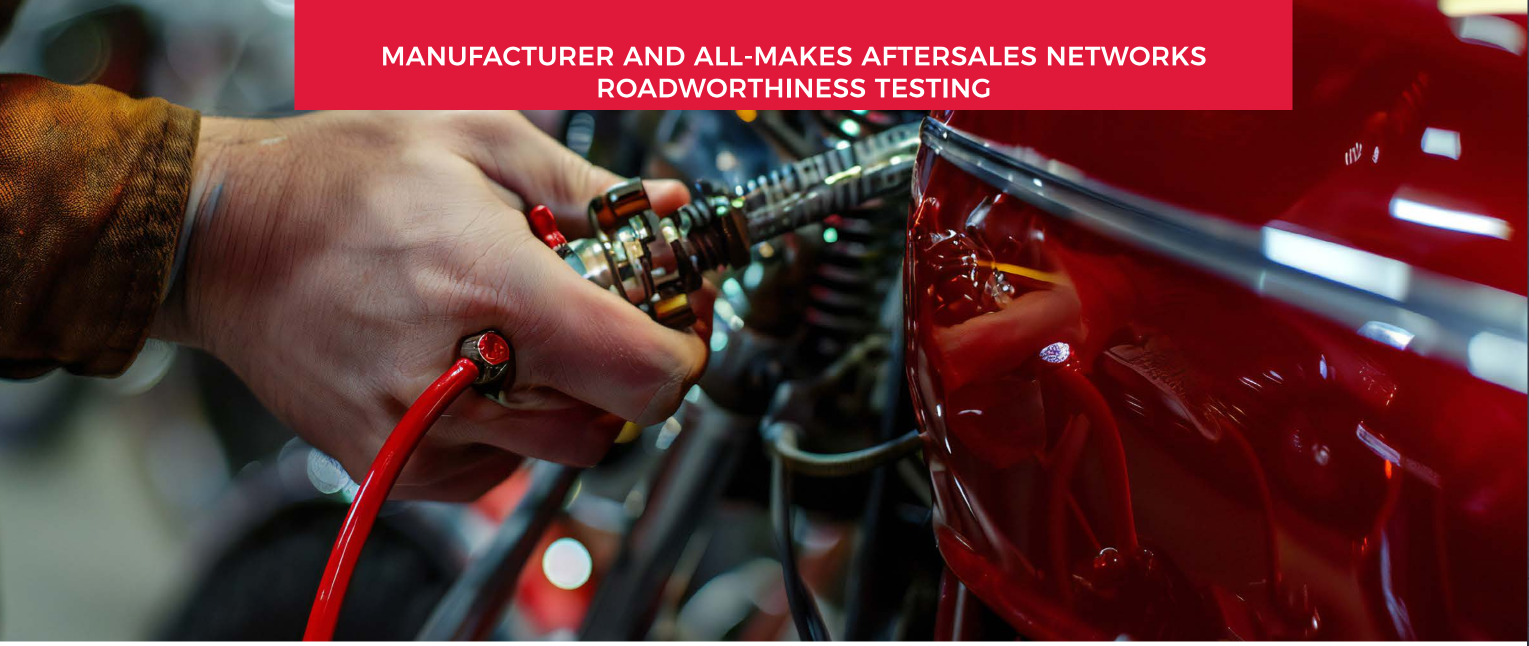
#2 . FAST FITTERS

(Speedy, Midas) arrived in France at the end of the 1970s.
Following a long period of prosperity (in the 80s and 90s) their number shrunk considerably in France. Limited in their services to the fastest jobs and by their footprint which is generally smaller than auto centres, and targeting city centres, they often provide regular maintenance services without the need for an appointment.

#3 . TYRE SPECIALISTS

Point S, Euromaster, BestDrive, Profil+, Vulco, Eurotyre) chains with European and even international reach (Point S), which since the 1970s have gradually acquired hundreds of local or regional independent dealers, have a mixed customer base made up of personal cars and trucks, and sometimes farm vehicles or special machines.

The common denominator of these three categories of players is that they conduct their sourcing from among the stock of parts and services distributors. Fast repairs call for immediate part availability, which sometimes only local distributor stockists can guarantee within the hour.



Roadworthiness testing gains a new category L

Created in France in 1991, roadworthiness tasting (contrôle technique, or CT) is a concession-based profession overseen by the ministry of the ecological transition. As the arbiter of the mechanical condition of each car, van and heavy goods vehicle in the automobile parc, the test is conducted in France exclusively on premises that are separate from any aftermarket business so as to guarantee its impartiality and ensure that there are no commercial motives arising from the results of the compulsory checks.

ROADWORTHINESS TESTING CENTRES IN FRANCE:

6,700
shop

11,500
employees *

22,439,217
tests
of personal cars and light commercial vehicles (plus vehicles registered as collector cars and vehicles subject to specific regulations, source UTAC-OTC)

**Source: ANFA*

The testing specification booklet, known as **the phrasier, changes regularly**. The latest substantial reform of the automobile roadworthiness test dates back to 2021, with the precise measurement of the opacity of diesel exhaust smoke.
In January 2025 the measurements had to include the vehicle fuel consumption data collected through the OBFCM (on-board fuel consumption monitoring). This requirement leads the test centre to record the fuel consumption of a vehicle (petrol, diesel or electric), with the data then escalated to the ministry. The OBFCM measurement is compulsory for all vehicles that came into circulation on or after 1 January 2024, and applies to their first roadworthiness test, therefore starting in January 2025. .

An additional roadworthiness test was introduced on 15 April 2024:
a test for L-category vehicles, comprising powered 2 and 3-wheelers, mopeds, quads and minicars.
Necessitating specific equipment dedicated to these types of vehicles, the test calls for moderate investment, in keeping with the size of the L-category fleet (there are about 4 million motorbikes on the road, which is a tenth of the number of cars). In 2025, category L roadworthiness testing centres must additionally have a sound level meter (the companies Capelec, Muller Automotive and AVL for example sell UTAC certified equipment).
In 2026, they will additionally need a celerometer.