

## AVERAGE AGE OF THE GLOBAL CAR FLEET

**10-11** years

This is the estimated average age of the global fleet\*, with significant variations between countries.

**Europe:** around 12.3-12.5 years

**United States:** around 12.8 years

**Emerging Asia (China or India):** around 5-7 years

\* in the absence of official consolidated figures

### TOP 5 global passenger vehicle sales (2025) (source: various studies)

- 1 **Toyota RAV4**  
2.1 million units (+1.5% vs 2024)
- 2 **Toyota Corolla**  
1.9 million units (stable)
- 3 **Tesla Model Y**  
1.8 million units (-11.2% vs 2024)
- 4 **Ford F-Series**  
1.6 million units (+2% vs 2024)
- 5 **Honda CR-V**  
1.4 million units (+3% vs 2024)



## 2025 NEW VEHICLE SALES FORECAST

**89.6**  
million units

sold worldwide  
+1.7% versus 2024  
(S&P Global forecast)

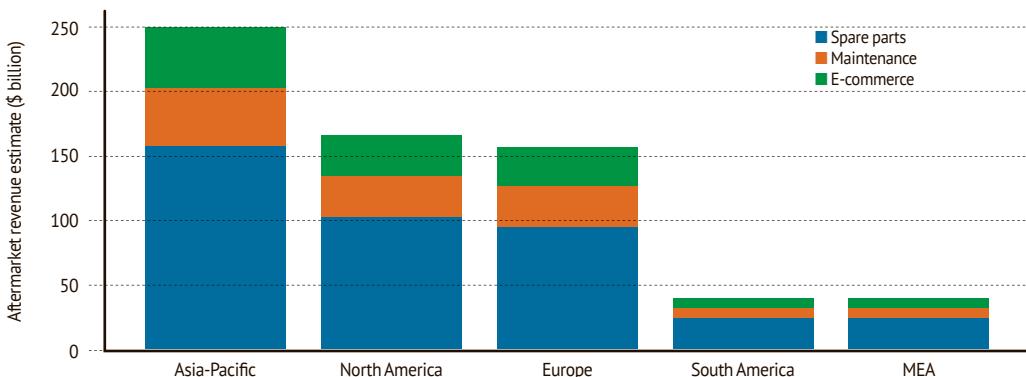
## AFTERMARKET : THE ENGINE OF THE AGEING FLEET

**\$502**  
billion

generated worldwide by the aftermarket in 2025 (parts and labour)

(source: Coherent Market Insights)

### Breakdown of aftermarket revenue by region and segment (2025) estimate



### Estimated breakdown of turnover – by major region

(estimate based on a compilation of sources: Berylls/AlixPartners, FIGIEFA/Aftermarket Insight, Roland Berger, etc.)

Area	IAM	OES	
Europe	≈ 60-65%	35-40%	Highly structured IAM, strong price competition, ageing fleet
North America	≈ 55-60%	40-45%	High influence of dealers, but solid IAM outside recent vehicles
Latin America	≈ 65-70%	30-35%	High price sensitivity, IAM dominance, ageing fleet
Asia (excluding Japan)	≈ 55-60%	40-45%	Heterogeneous: strong OES in urban China, AAM dominant elsewhere
Japan	≈ 50-55%	45-50%	Very powerful manufacturer networks and high loyalty
Middle East & Africa	≈ 65-70%	30-35%	IAM dominant, parallel imports, low OEM network density

### Distribution of remanufactured parts revenue by region

Region	Revenue Share (%)
USA	35%
Asia Pacific	30%
Europe	20%
Middle East Africa	10%
South America	5%



### Garage equipment: growth trends



This expansion is mainly due to the increase in the global vehicle fleet, growing demand for regular vehicle maintenance, and technological complexity incorporating advanced driver assistance systems and electrified powertrains, requiring ongoing investment in specialised equipment.

(source: Research and Markets)

### Distribution of global aftermarket revenue

(estimate based on the aggregation of various studies: Data Horizon Research, Business Research Company, etc.)

Region	Estimated market share
Asia-Pacific (APAC)	40-45%
North America	25-30%
Europe	25-30%
Latin America	6-8%
Middle East-Africa (MEA)	6-8%

### Regional breakdown of online parts sales by segment

(estimate based on studies by Mordor Intelligence, Grand View Research, MarketDataForecast, etc.)

Region	Share of e-commerce
Asia-Pacific (APAC)	16.4%
North America	14.6%
Europe	14%
Latin America	12.5%
Middle East-Africa	12.5%

### Online parts sales

**30%** of total parts sales, or around \$160 billion

### Global market for remanufactured parts

**\$140** billion in 2032

+8.7% vs 2025 (Coherent Market Insights forecast)