

An abstract graphic consisting of a complex network of dark grey and black lines and triangles, with some red triangles, set against a dark background. The lines and triangles form a dense, interconnected structure that resembles a molecular or crystalline lattice.

IBIS | INTERNATIONAL
BODYSHOP
INDUSTRY
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INDIA 2017

India in the global collision repair sector

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GiPA

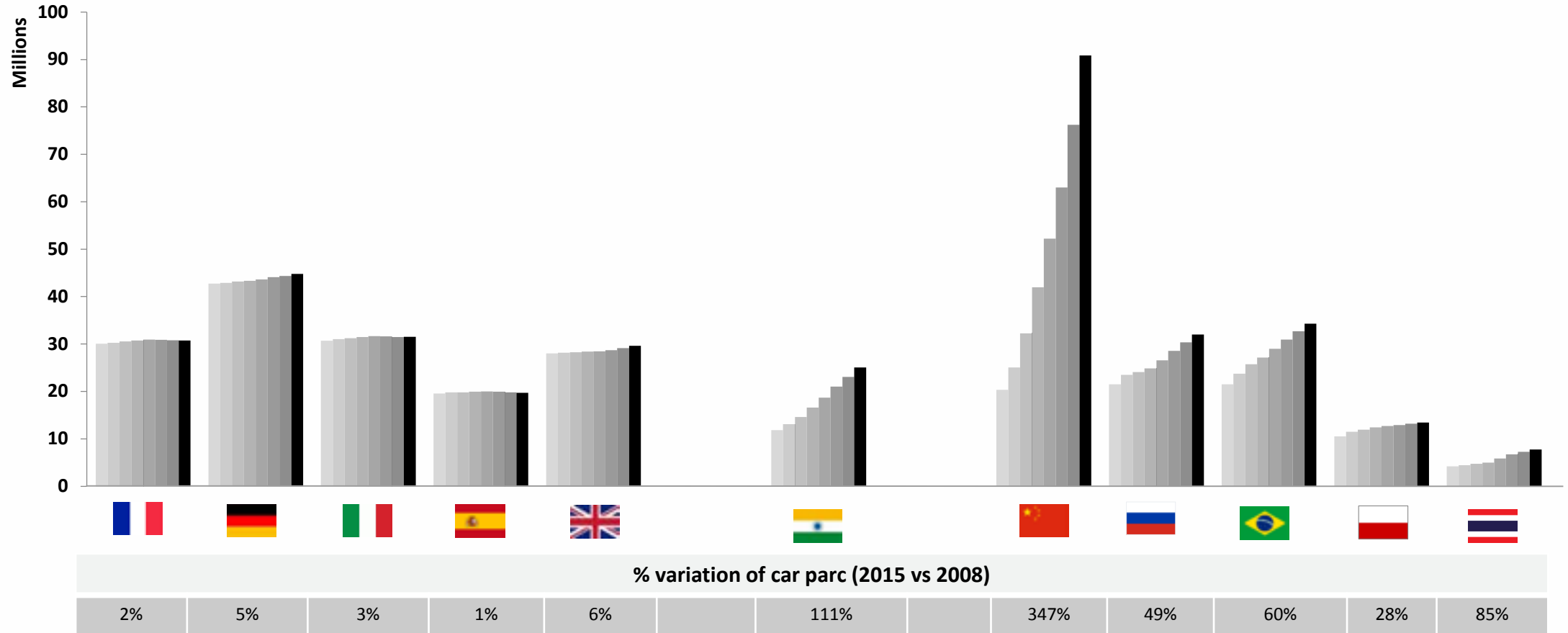
About GiPA...



Car parc size in evolution: 2008 until 2015

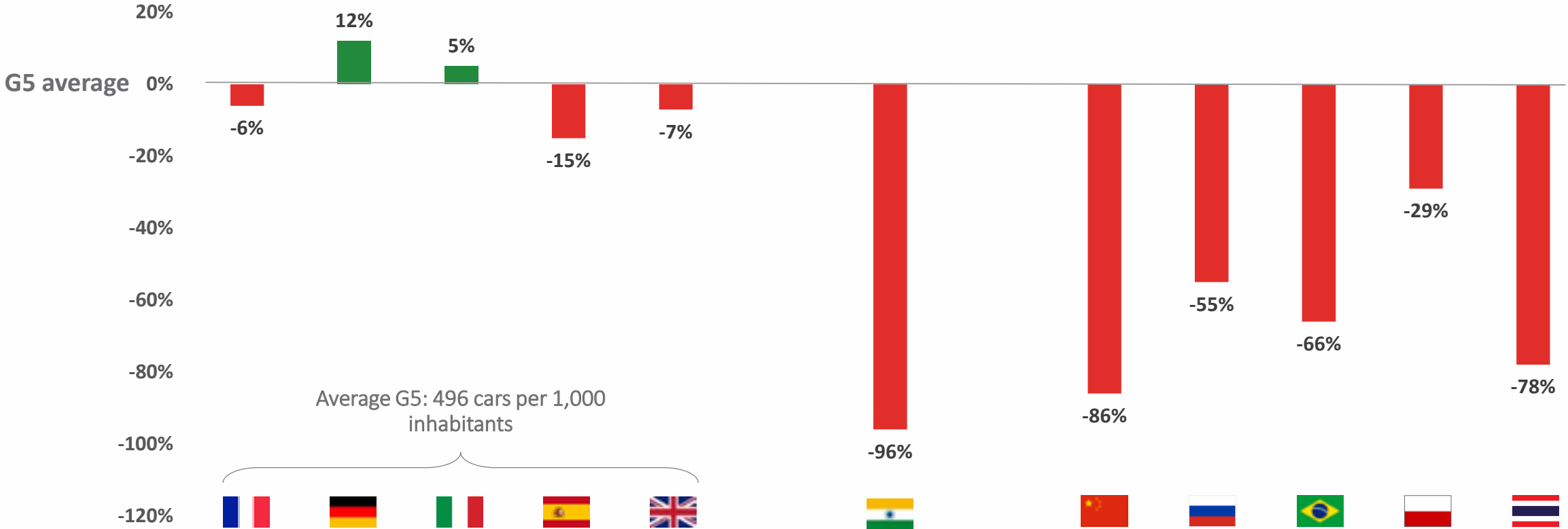
China clearly stands out due to the massive car parc increase in the last seven years.

India is the 2nd country with the highest increase in the number of vehicles since 2008.



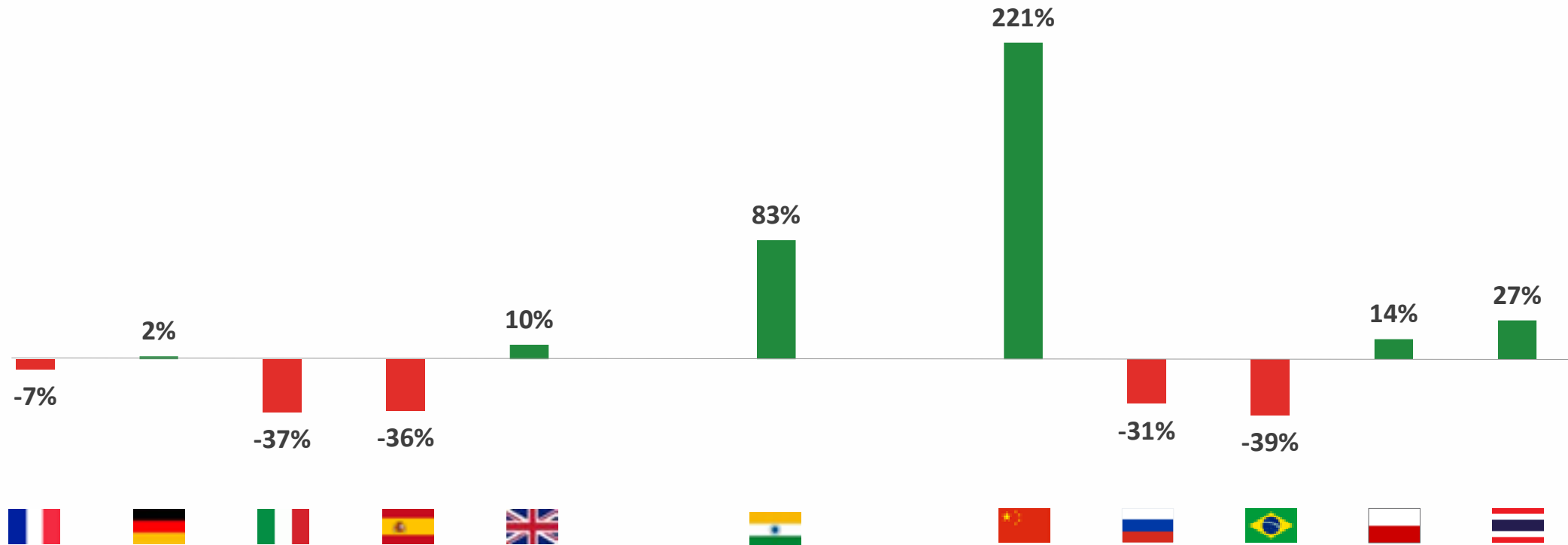
Passenger car equipment rate per 1,000

Compared to the European's G5 average, India has the biggest difference in equipment rate with only 21 cars per 1,000 inhabitants.



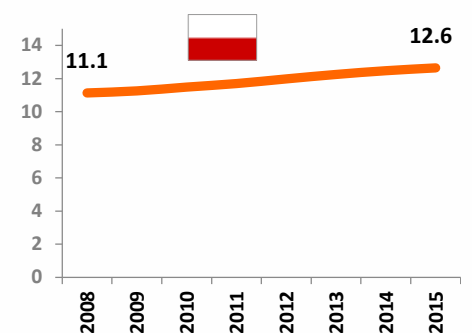
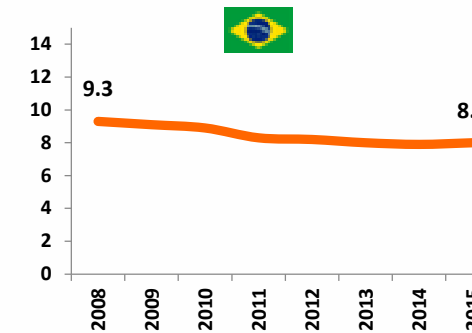
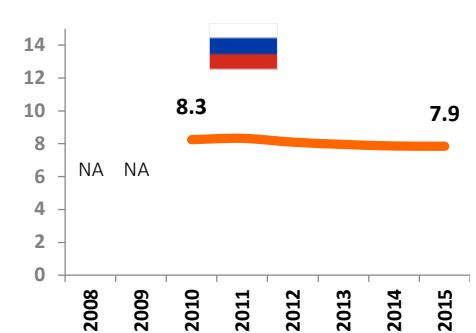
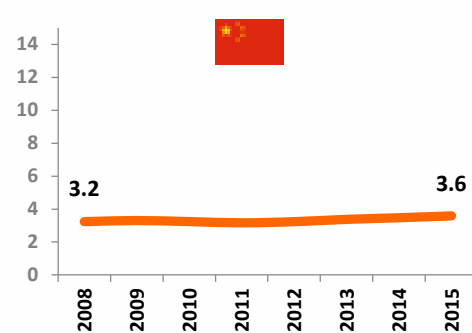
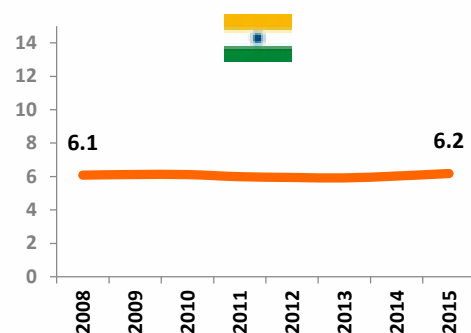
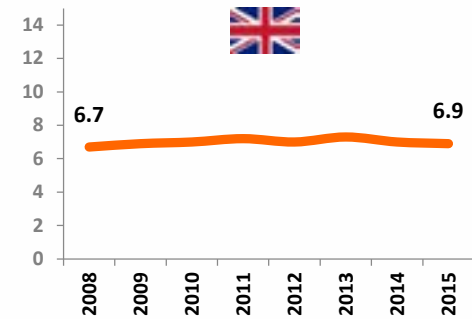
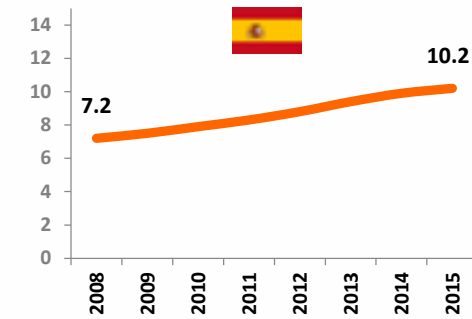
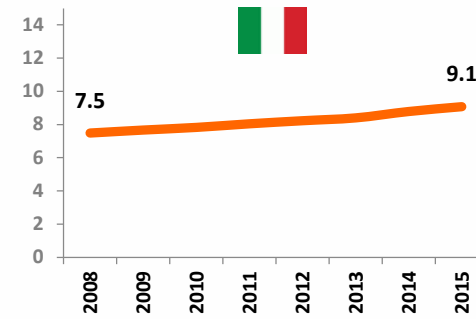
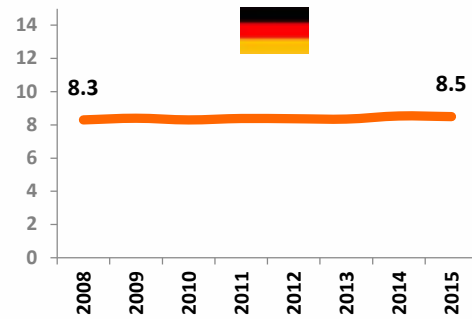
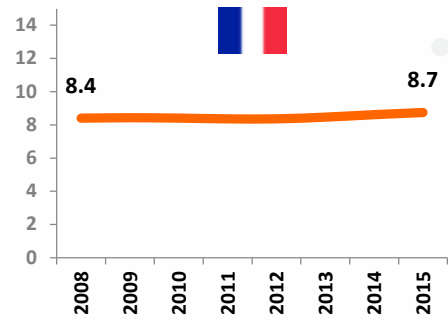
New car registrations 2015 vs. 2007

China has been the country with the highest increase in new car registrations since 2007, followed by India.



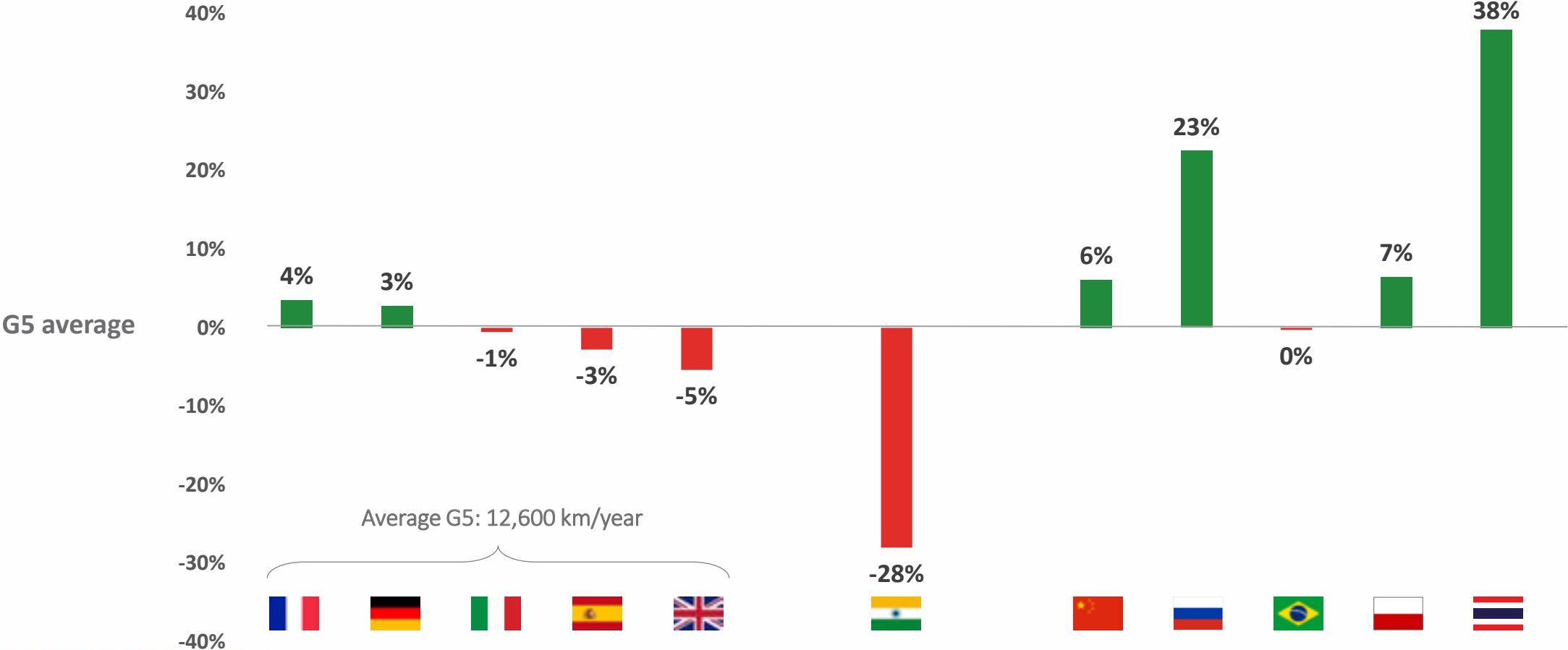
Car parc age

Within Europe's G5 group, Spain has the oldest car parc, with a large increase over the last 7 years. In emerging markets the situation varies.



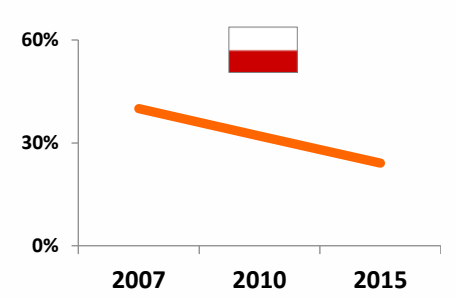
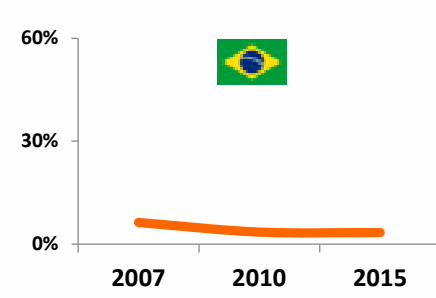
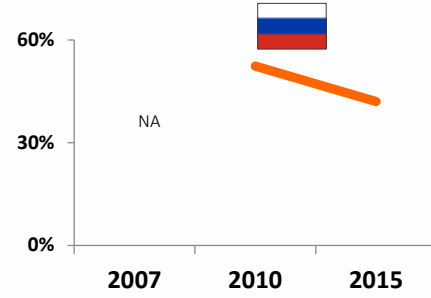
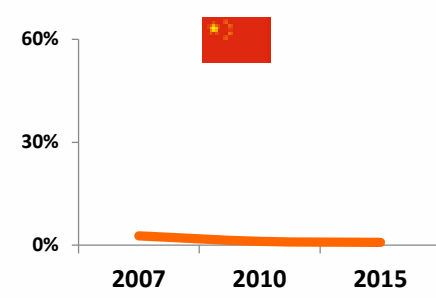
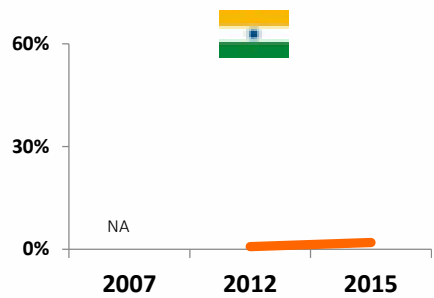
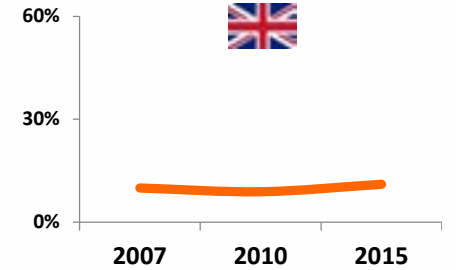
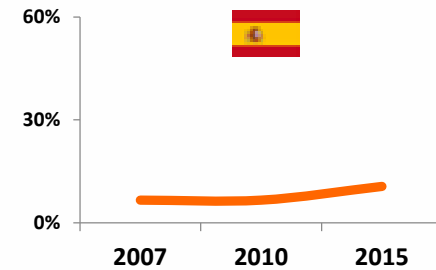
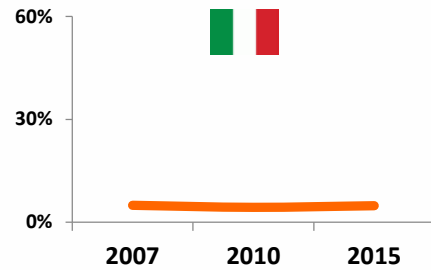
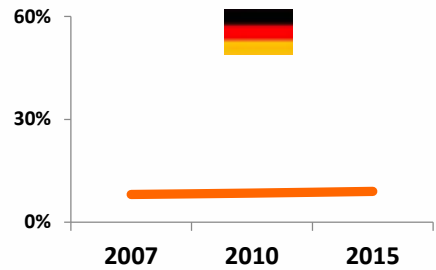
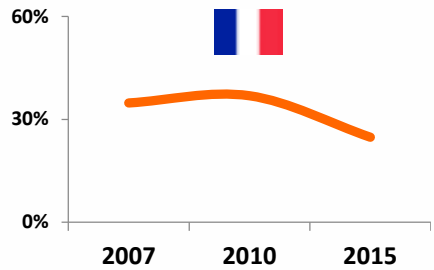
Annual mileage

Russia and Thailand have the highest average annual level of kilometers driven, while India has the lowest. However India is one of the few countries in the World where we monitor an increase.



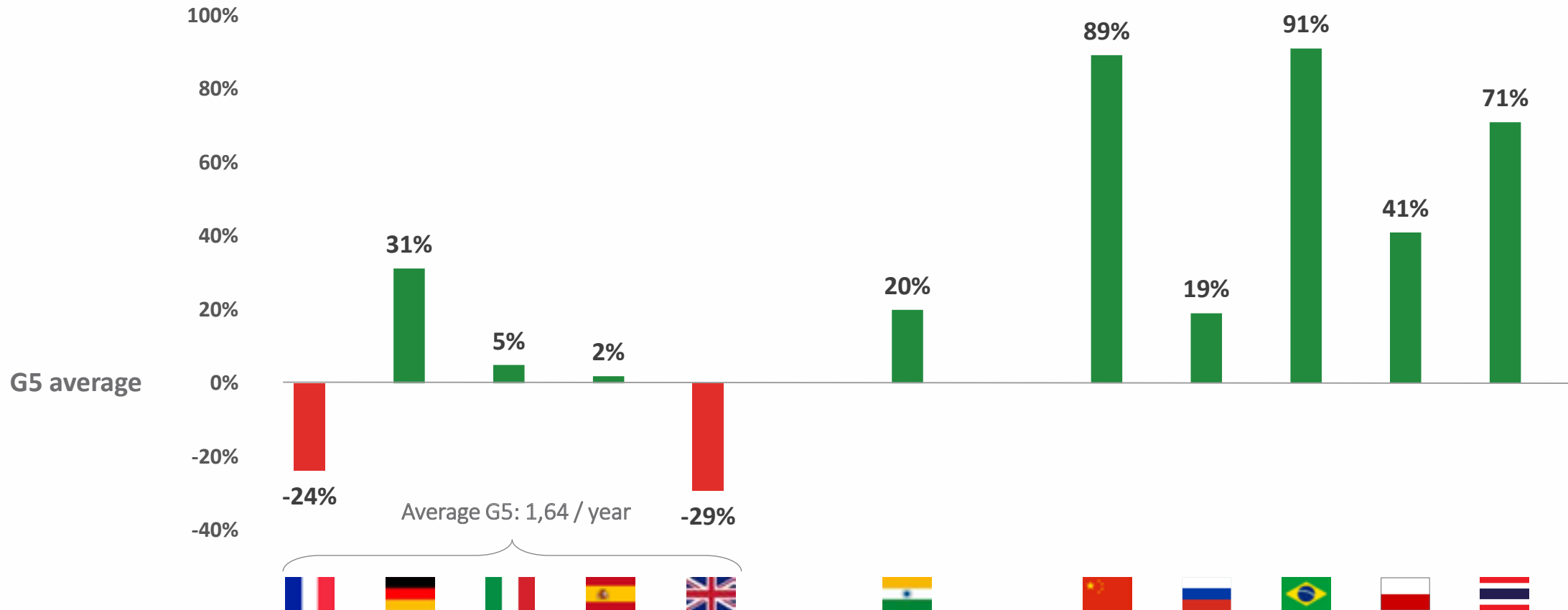
Do-It-Yourself in evolution

In most of the European countries, the share of Do-It-Yourself has been decreasing since 2007, except for Spain. DIY and Buy&Fit represent nearly 40% of body paint operations in Russia!



Number of workshop entries per year

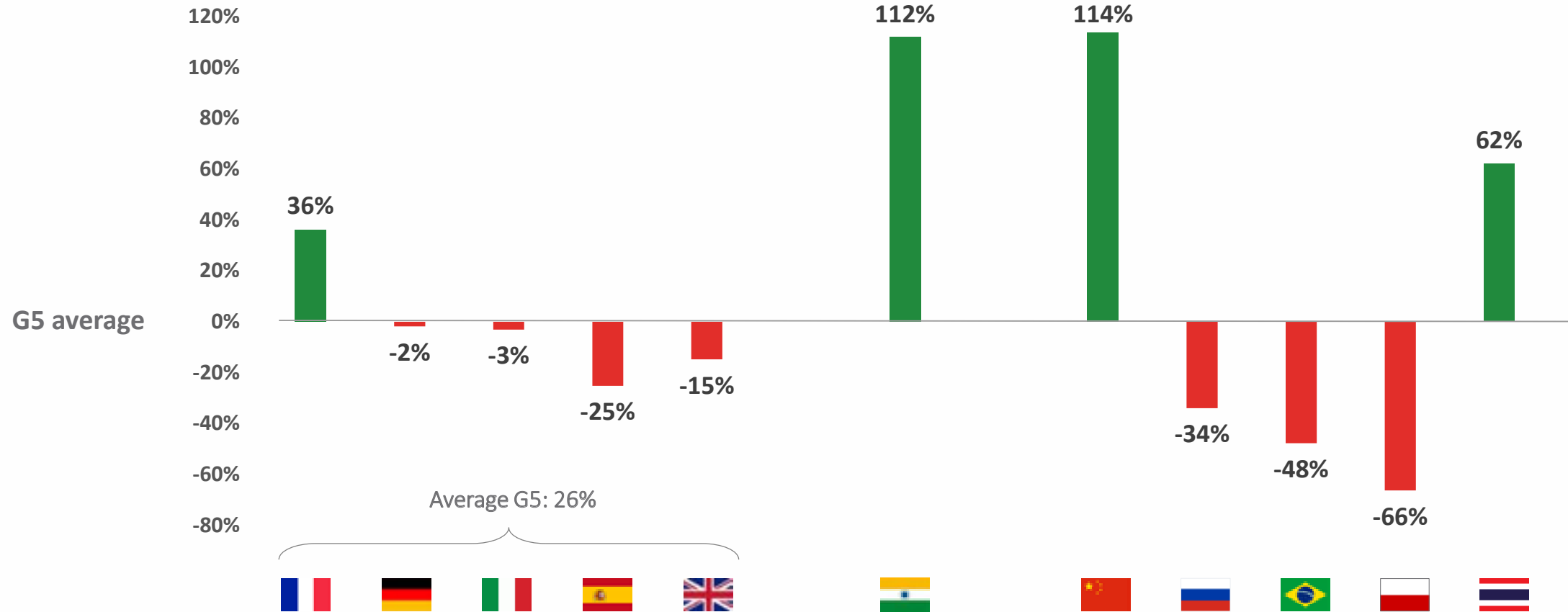
China and Brazil have significantly more entries than the G5 average, while India's value is similar to Russia.



OES market shares

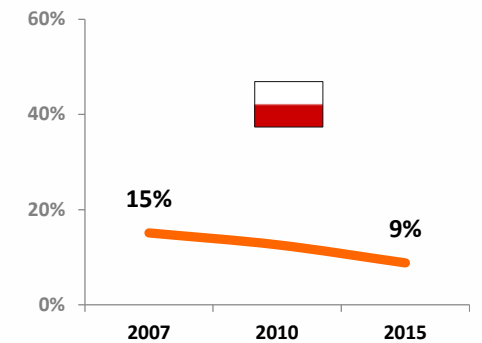
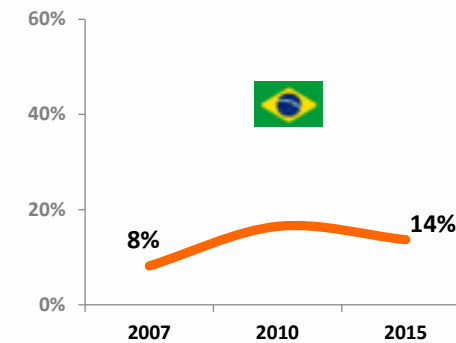
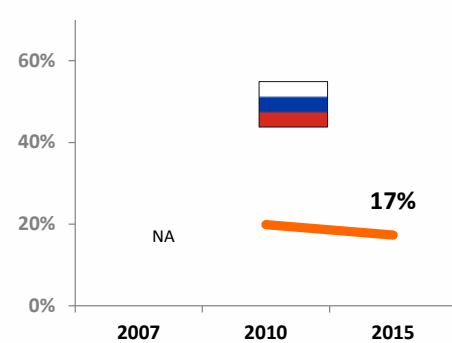
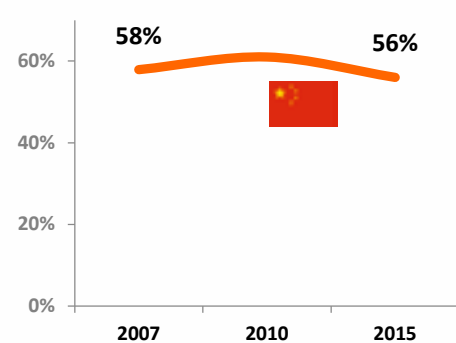
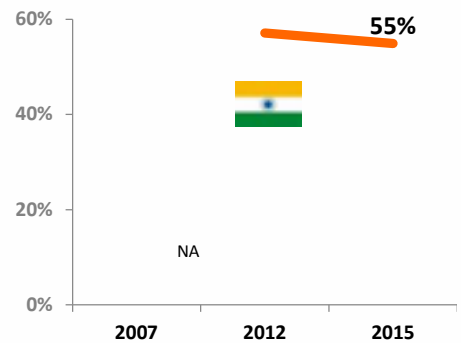
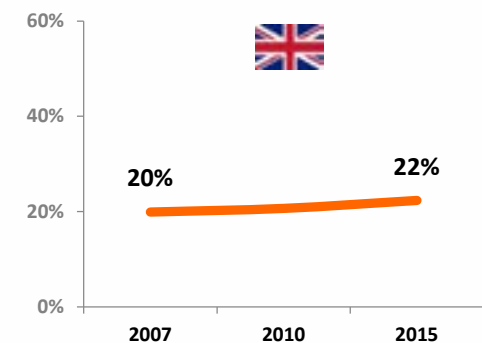
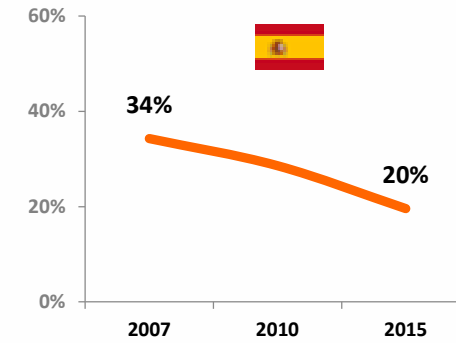
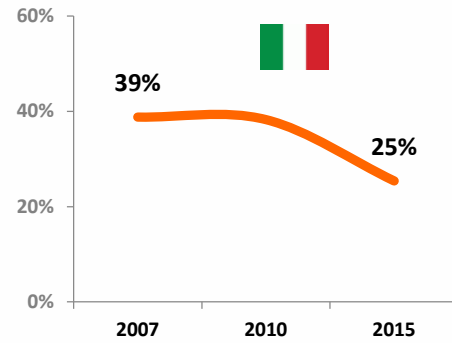
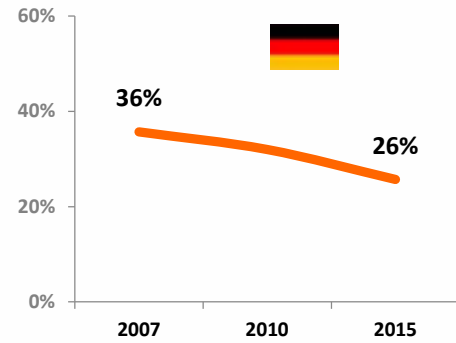
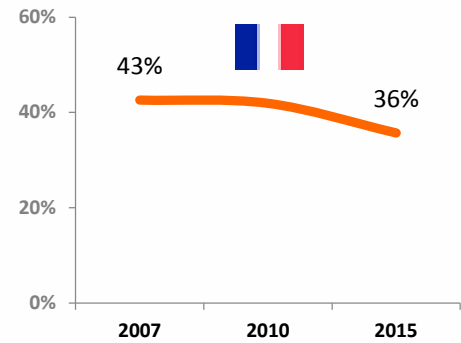
China and India are by far leaders in OES market share.

Car manufacturers are the weakest in Poland, Russia and Brazil.



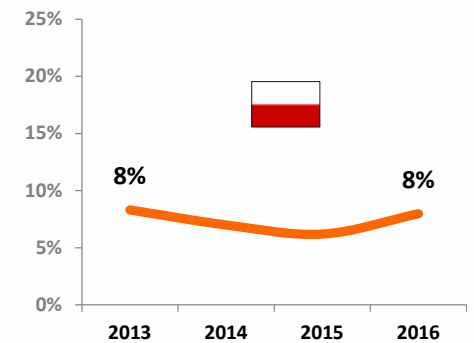
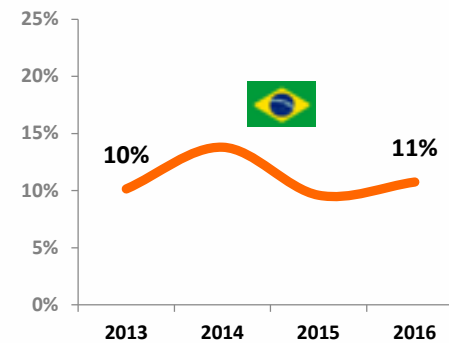
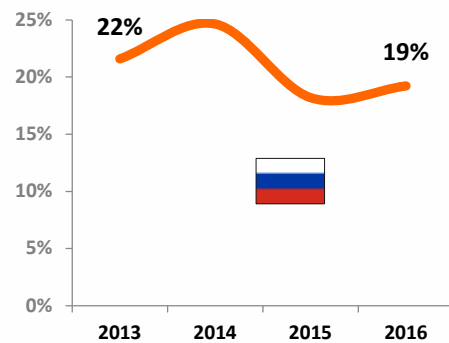
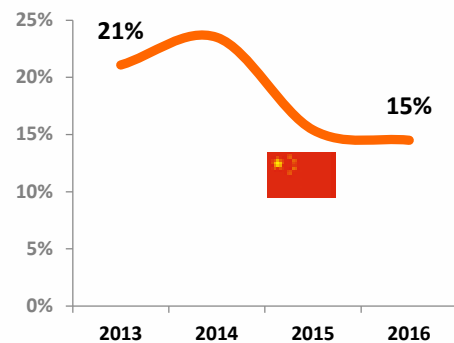
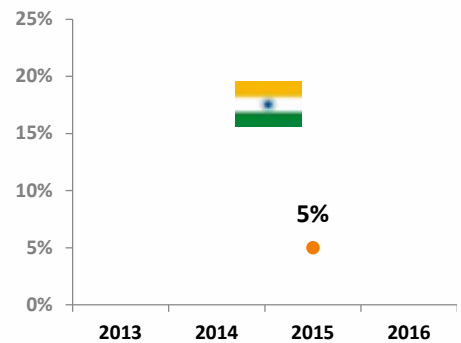
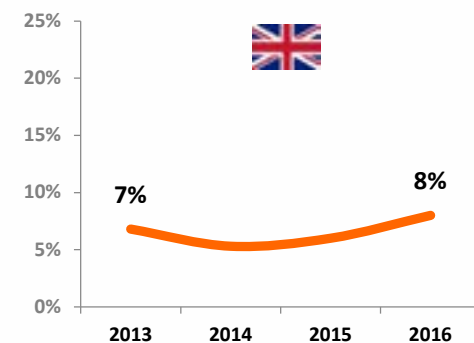
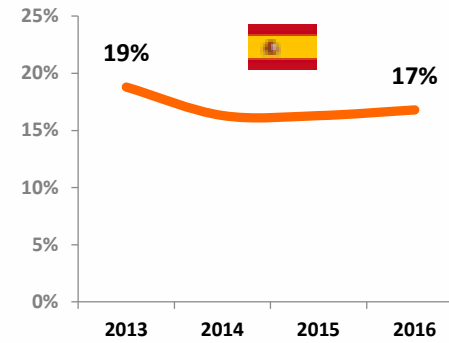
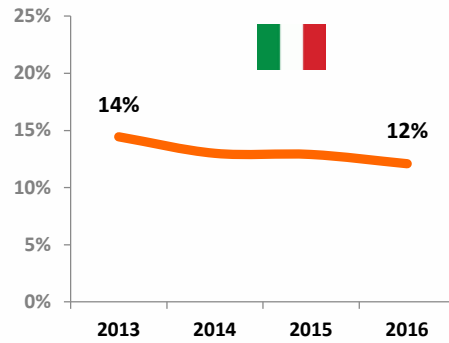
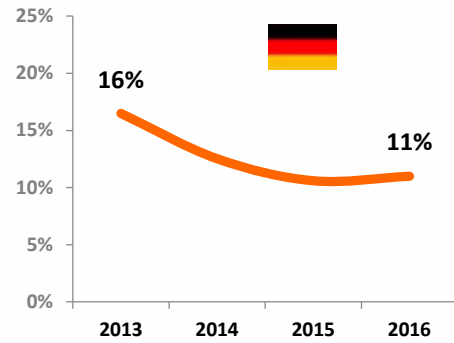
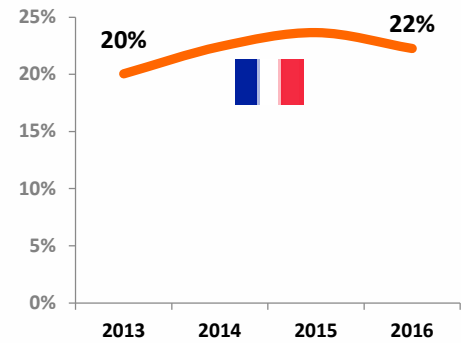
Evolution of the OES market shares

OES has been losing market shares in Europe. UK is the only country with an increasing trend. China and India are leaders in OES market share, however the trend is towards a decrease.



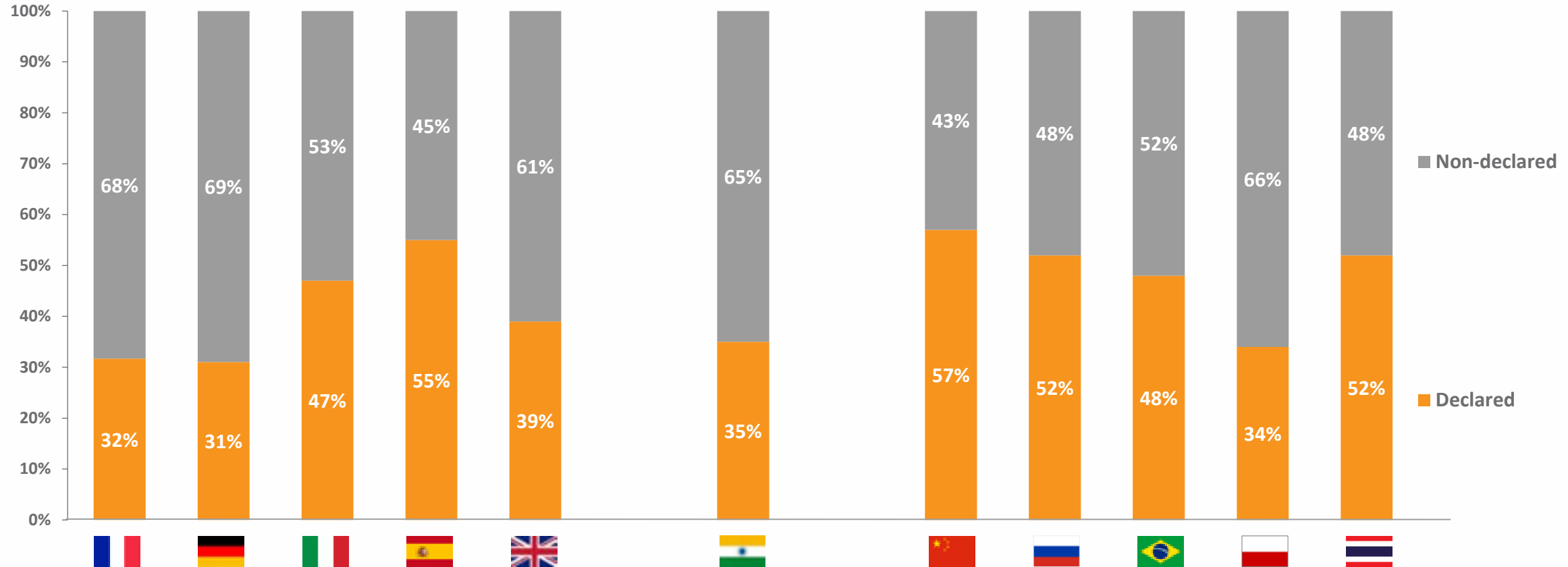
Accident rate in evolution: 2013 until 2016

In most countries the accident rate has been stabilizing or increasing over the last two years. France, Russia and China have the highest accident rates.



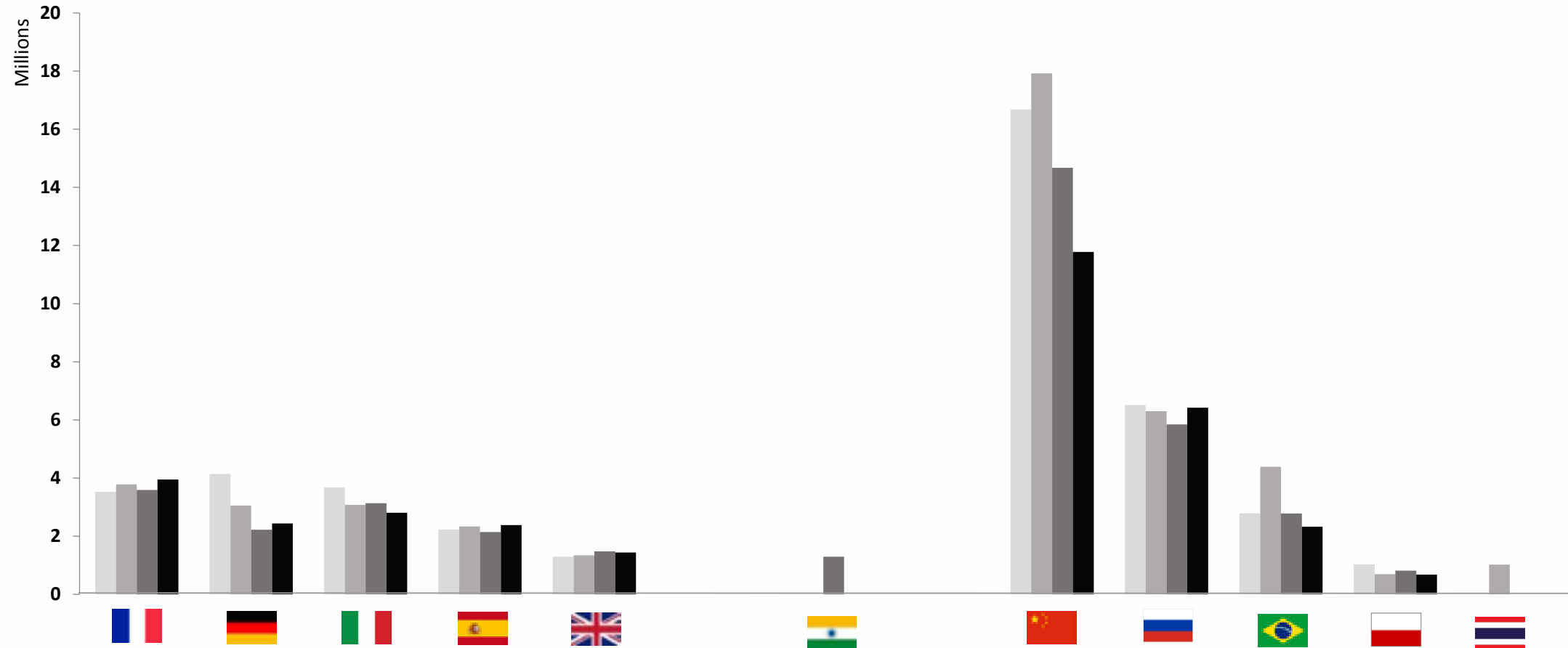
Declared vs. undeclared accidents 2015

The share of declared accidents varies from one country to another according to insurance policies. In all countries the repair rate of declared accidents is much higher than that of non-declared ones.



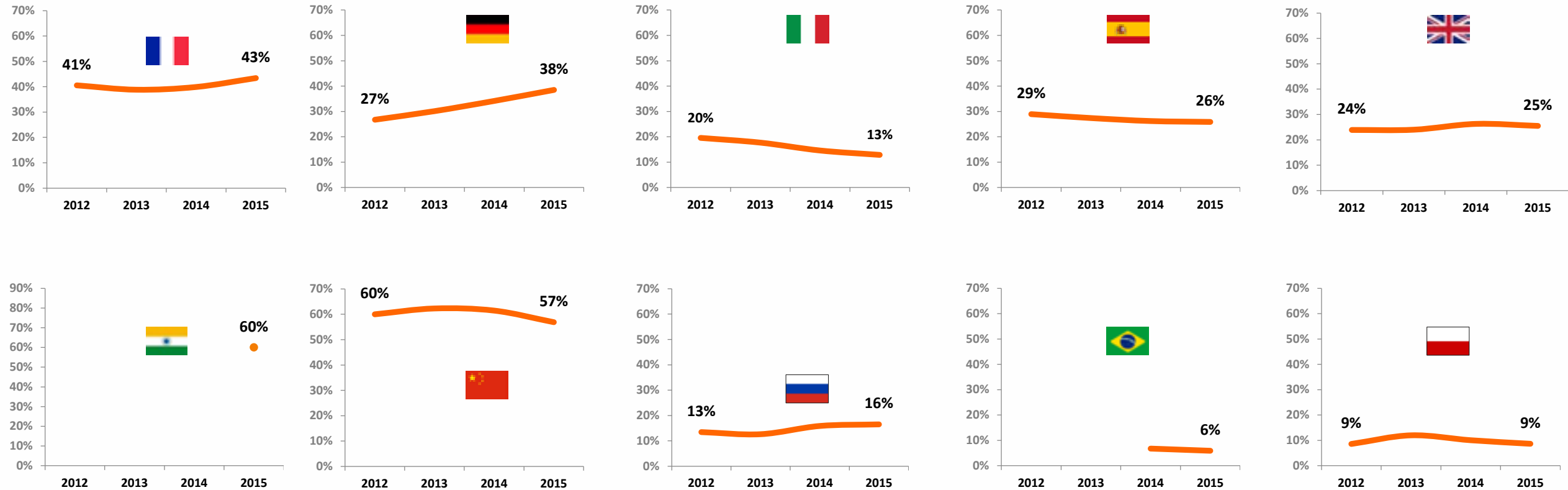
Repaired accidents: 2013 until 2016

Combining the biggest car parc and high accident/declarations rates, China represents by far the largest collision market. The size of India's collision market is close to that of the UK.



OE market share for painting: 2012 until 2015

The OE market share for body panels painting varies a lot from one country to another. OEs are strongly dominant in China and India. This is the repair location declared by drivers.



Mega trends impacting the Indian collision sector

Mega-trends will strongly impact the Indian automotive industry and the collision sector in the coming years.



Connectivity



ADAS



Infrastructures



Urbanization



Ecology



New mobility



Gender shift



Young society



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Thank you

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