

Automotive Spare Parts Market Forecasts to 2034 – Global Analysis By Replacement Part (Engine & Powertrain Parts, Transmission & Driveline Parts, Brake Parts, Suspension & Steering Parts, Electrical & Electronic Parts, Filters, Body & Exterior Parts, Exhaust & Emission Components, Wheels & Tires, Thermal Management & Air Conditioning Parts, and Other Spare Parts), Vehicle Type, Powertrain, Vehicle Age, Service Type, Customer Type, Distribution Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Automotive Spare Parts Market is accounted for \$558.3 billion in 2026 and is expected to reach \$973.8 billion by 2034 growing at a CAGR of 7.2% during the forecast period. Automotive spare parts encompass the wide range of components used for the maintenance, repair, and enhancement of vehicles after their original sale, including brake parts, filters, lighting, suspension, electronics, body parts, tires, and performance upgrades. The market serves diverse vehicle ages from less than 3 years to more than 15 years, addressing routine maintenance, wear-and-tear replacement, breakdown repair, and collision repair needs. As vehicles become increasingly complex and remain on roads longer, the aftermarket has evolved into a critical ecosystem supporting millions of independent workshops, franchise chains, and original equipment manufacturer service centers.

Market Dynamics:

Driver:

Rising average vehicle age and expanding global vehicle parc

Vehicles are remaining on roads longer than ever before due to improved manufacturing quality and economic pressures delaying new purchases, creating sustained demand for replacement parts and maintenance services. In mature markets, the average vehicle age now exceeds twelve years, with consumers increasingly preferring repair over replacement. This extended ownership cycle directly drives aftermarket expenditures as components naturally wear and require periodic replacement. Simultaneously, rapidly growing vehicle ownership in emerging markets adds millions of vehicles to the global parc. The dual effect of vehicle aging and parc expansion ensures steady demand across all service segments, from routine maintenance to major repairs.

Restraint:

Increasing vehicle complexity and EV adoption reducing maintenance needs

Modern vehicles integrate advanced electronic systems, ADAS, and proprietary software that require specialized diagnostic equipment and manufacturer-trained technicians, creating service gaps as many independent workshops cannot afford continuous upgrades. Original equipment manufacturers are increasingly restricting access to vehicle data and repair information, directing customers to authorized service centers. Furthermore, the accelerating adoption of electric vehicles poses a long-term structural threat to traditional aftermarket service and parts volumes, as EVs have far fewer moving parts and require less frequent maintenance compared to internal combustion engine vehicles.

Opportunity:

Digitalization of auto parts retail and e-commerce expansion

Online platforms are transforming how consumers and workshops source replacement parts, offering unprecedented price transparency and extensive product inventories. E-commerce enables consumers to directly purchase maintenance items while providing independent technicians access to professional-grade parts at competitive prices. Digital catalogs with vehicle-specific compatibility data reduce ordering errors, while fast delivery networks ensure next-day or even same-day parts availability for urgent

repairs. This digital transformation lowers barriers for small workshops to access quality parts while offering price-sensitive consumers greater choice. Established parts retailers are investing heavily in omnichannel capabilities to capture growing online demand.

Threat:

Counterfeit parts and supply chain disruption risks

The aftermarket faces persistent challenges from counterfeit parts that compromise vehicle safety and performance. Margin pressure and supply-chain disruption, coupled with complexity in catalog accuracy across growing vehicle model diversity, moderate market adoption. Global trade tensions, material constraints, and geopolitical factors have elevated the importance of inventory strategies and supplier diversification. The fragmented nature of the aftermarket with numerous parts manufacturers, distributors, workshops, and retail chains creates vulnerabilities in quality control and supply consistency.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the automotive spare parts market. Initial disruptions included supply chain interruptions, manufacturing slowdowns, and reduced vehicle usage during lockdowns that decreased immediate repair demand. However, economic pressures delaying new vehicle purchases extended average vehicle age, sustaining replacement parts demand. The pandemic accelerated digitalization of auto parts retail as consumers shifted to online purchasing. Post-pandemic, the market has shown resilience with continued vehicle parc growth and aging trends supporting steady aftermarket demand across all service categories.

The Wear-and-Tear Replacement segment is expected to be the largest during the forecast period

The Wear-and-Tear Replacement segment is expected to account for the largest market share during the forecast period, driven by the natural lifecycle of vehicle components that require periodic replacement regardless of driving conditions. Components including brake pads, filters, batteries, tires, and suspension parts experience predictable wear patterns, creating consistent, recurring demand across all vehicle ages. The segment benefits from established replacement schedules recommended by manufacturers and widespread consumer awareness of maintenance needs. As vehicle parc expands and average vehicle age increases, wear-and-tear

replacement volumes continue growing steadily.

The Breakdown Repair segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Breakdown Repair segment is predicted to witness the highest growth rate, fueled by increasing vehicle complexity, rising average vehicle age, and growing reliance on personal mobility. As vehicles accumulate higher mileage and incorporate more sophisticated electronic systems, the probability of unexpected component failures increases. The segment benefits from the essential nature of breakdown repairs, which cannot be deferred and often involve higher-value components. Expanding vehicle parc and the trend toward keeping vehicles longer ensure growing breakdown repair requirements, delivering the fastest service type growth.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by a mature vehicle fleet, high vehicle ownership rates, and robust aftermarket service infrastructure. The United States leads regional growth with an extensive network of independent repair shops, franchise chains, and OEM service centers. High average vehicle age, exceeding twelve years in mature markets, drives sustained replacement parts demand. Well-established distribution channels, strong e-commerce penetration, and consumer preference for vehicle maintenance and customization support consistent aftermarket spending.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid vehicle sales, expanding middle-class demand, and strong aftermarket networks in China and India. The region's rapidly growing vehicle parc, driven by rising vehicle ownership across emerging economies, creates substantial demand for spare parts and maintenance services. Digital auto parts retail adoption is accelerating, expanding market accessibility. As vehicle ownership continues growing and the parc ages, Asia Pacific delivers the fastest automotive spare parts market growth globally.

Key players in the market

Some of the key players in Automotive Spare Parts Market include Robert Bosch GmbH, ZF Friedrichshafen AG, DENSO Corporation, Continental AG, Valeo SE, BorgWarner Inc., Magna International Inc., Aisin Corporation, Schaeffler AG, Tenneco Inc., MAHLE GmbH, Hitachi Astemo, Ltd., Marelli Holdings Co., Ltd., KYB Corporation, Brembo S.p.A., FORVIA HELLA, Gates Corporation, and Lear Corporation.

Key Developments:

In August 2026, Schaeffler expanded its aftermarket offering under the "Schaeffler Vitesco" co-brand by introducing dedicated petrol and diesel high-pressure injectors capable of handling up to 2,500 bar.

In June 2026, Bosch announced the release of 172 new automotive aftermarket part numbers spanning braking, engine management, rotating machines, and fuel injection to expand coverage across millions of vehicles.

In May 2026, ZF Aftermarket expanded its high-voltage EV training program and dedicated spare parts portfolio, introducing integrated e-mobility repair kits and electric axle drives for independent workshops.

In May 2026, Brembo introduced its upgraded aftermarket brake pad lines featuring specialized friction compounds optimized for low dust emissions and electric vehicle compatibility.

Replacement Parts Covered:

Engine and Powertrain Parts

Transmission and Driveline Parts

Brake Parts

Suspension and Steering Parts

Electrical and Electronic Parts

Filters

Body and Exterior Parts

Exhaust and Emission Components

Wheels and Tires

Thermal Management and Air Conditioning Parts

Other Spare Parts

Vehicle Types Covered:

Passenger Cars

Light Commercial Vehicles (LCVs)

Heavy Commercial Vehicles (HCVs)

Buses and Coaches

Two-Wheelers

Three-Wheelers

Off-Highway and Specialty Vehicles

Powertrains Covered:

Internal Combustion Engine (ICE) Vehicles

Hybrid Electric Vehicles (HEVs)

Plug-in Hybrid Electric Vehicles (PHEVs)

Battery Electric Vehicles (BEVs)

Other Alternative-Fuel Vehicles

Vehicle Ages Covered:

Less Than 3 Years

3–6 Years

7–10 Years

11–15 Years

More Than 15 Years

Service Types Covered:

Routine Maintenance

Wear-and-Tear Replacement

Breakdown Repair

Collision Repair

Customer Types Covered:

Individual Vehicle Owners

Independent Workshops and Garages

Authorized Service Centers

Fleet Operators

Rental and Leasing Companies

Commercial and Transportation Operators

Distribution Channels Covered:

Online Retailers and E-Commerce Platforms

Independent Retailers and Specialty Stores

Wholesalers and Distributors

OEM Authorized Dealerships and Service Networks

Direct Sales to Workshops and Fleet Operators

Regions Covered:

North America
United States

Canada

Mexico

Europe
United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030,

2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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