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Tuning study 2023

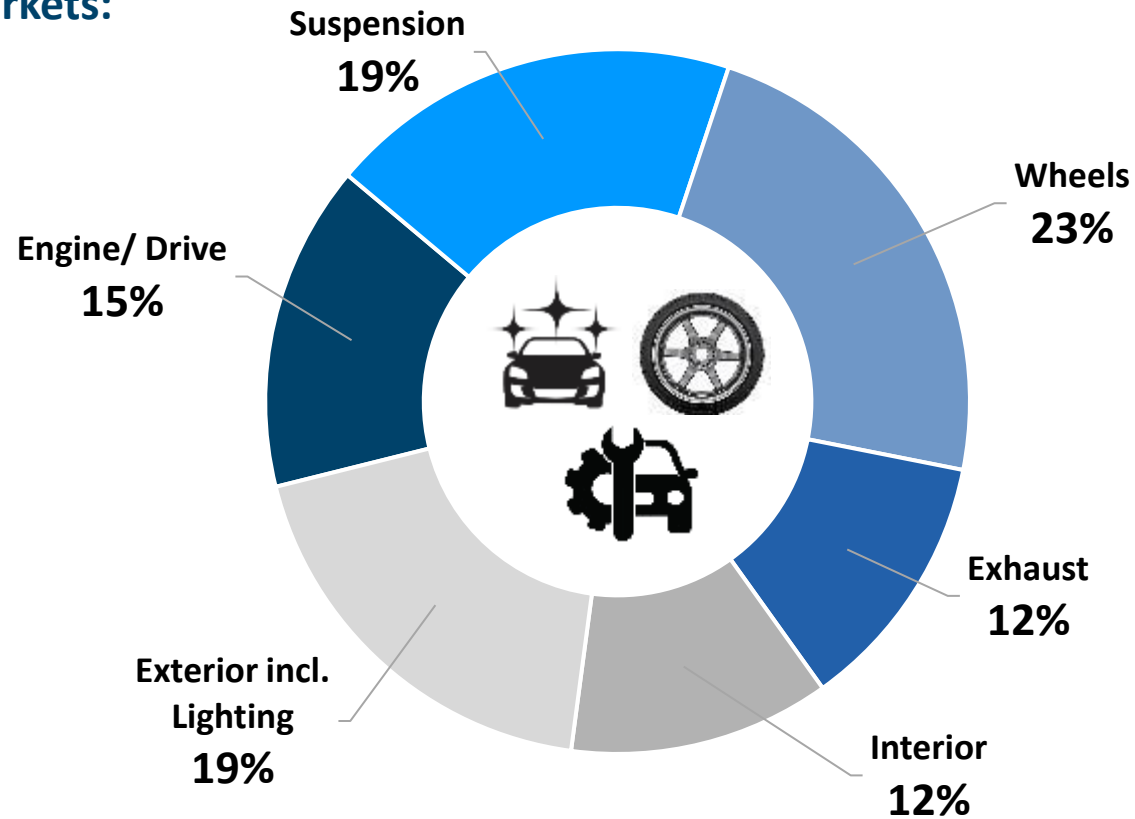
"Emotional mobility, car tuning and refinement" (1st edition)

BBE Automotive GmbH
Cologne, December 2023

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AUTOMOTIVE

What is the composition of the market?

The submarkets:



Added to this are the new cars from car manufacturers' performance brands. The Alpina, Audi Sport, BMW M, VW R and AMG brands alone generate a market worth more than €4 billion in Germany.

Tuning expenditure in the automotive industry:

approx. € 2 billion

- Parts and accessories
- Workshop services for installations and conversions
- Paintwork and foiling

By comparison, the "classic car industry":

A total of € 1.9 billion

Important performance track for car manufacturers



Annual production: 137,700
New registrations D 2022: 15,405



Annual production: 177,257
New registrations D 2022: 14,094



Annual production: approx. 1,500
New registrations D 2022: 657



Annual production: approx. 30,000
New registrations D 2022: 9,331



Annual production: 45,515
New registrations D 2022*: 13,784

*Additional 11,813 Audi S models

Source: New registrations KBA Fz.4, 1.1.2023, annual production Internet research

Selection of other vehicle manufacturers: TOYOTA GAZOO Racing Europe GmbH, Nissan Motorsports International

In total, German OE manufacturers produce **almost 400,000 complete vehicles per year.**

More than 50,000 new vehicles of these brands are **registered** in Germany every year.

In total, more than 5,000 employees work for the German companies alone.

Assuming an average sales price of **€ 85,000**, the market volume of these five brands is over **4 billion €** per year in Germany



The industry

The players in the aftermarket



> **4,000**

Workshops are at least marginally involved with the topic of "tuning"

over **200** are specialists

approx. **150**

Parts, tyre and wheel manufacturers deal with the topic of "tuning"



approx. **50**

Larger online shops for tuning parts



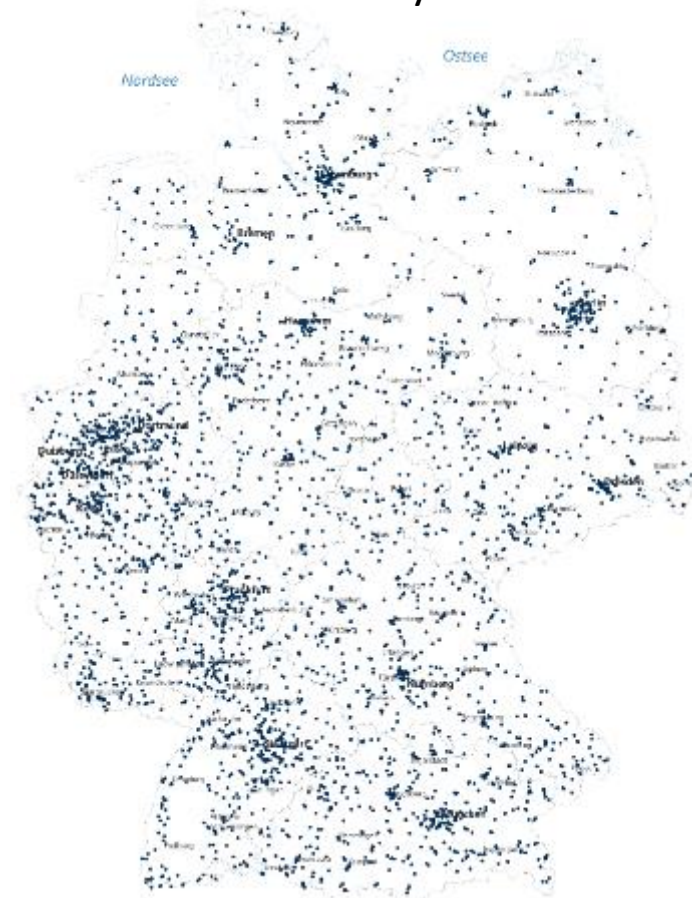
approx. **40** Vehicle tuner



> **5,000**

Employees as tuning specialists

Distribution of trading and assembly partners nationally

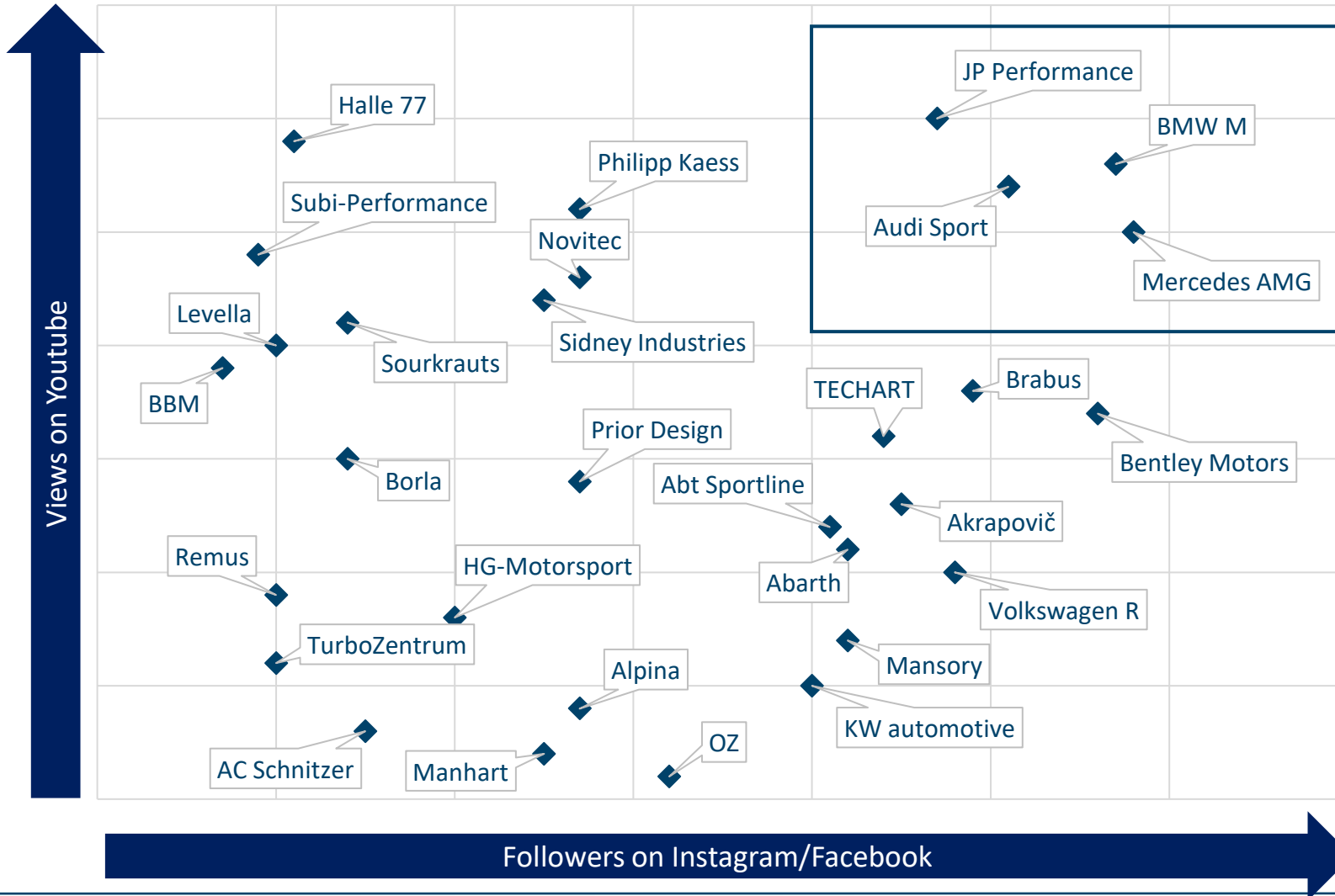


over 4,000 address entries

Description of the tuning scene

Presence of selected players on social media

Instagram, Facebook and YouTube   



This chart shows the **rank of the individual companies/brands** in terms of views on YouTube and followers on Instagram and Facebook.

The focus of the respective activities is clear.

Three vehicle manufacturers dominate the number of followers.

JP Performance and Halle 77 are ahead in terms of YouTube views.

Details on the social media data can be requested from BBE Automotive.