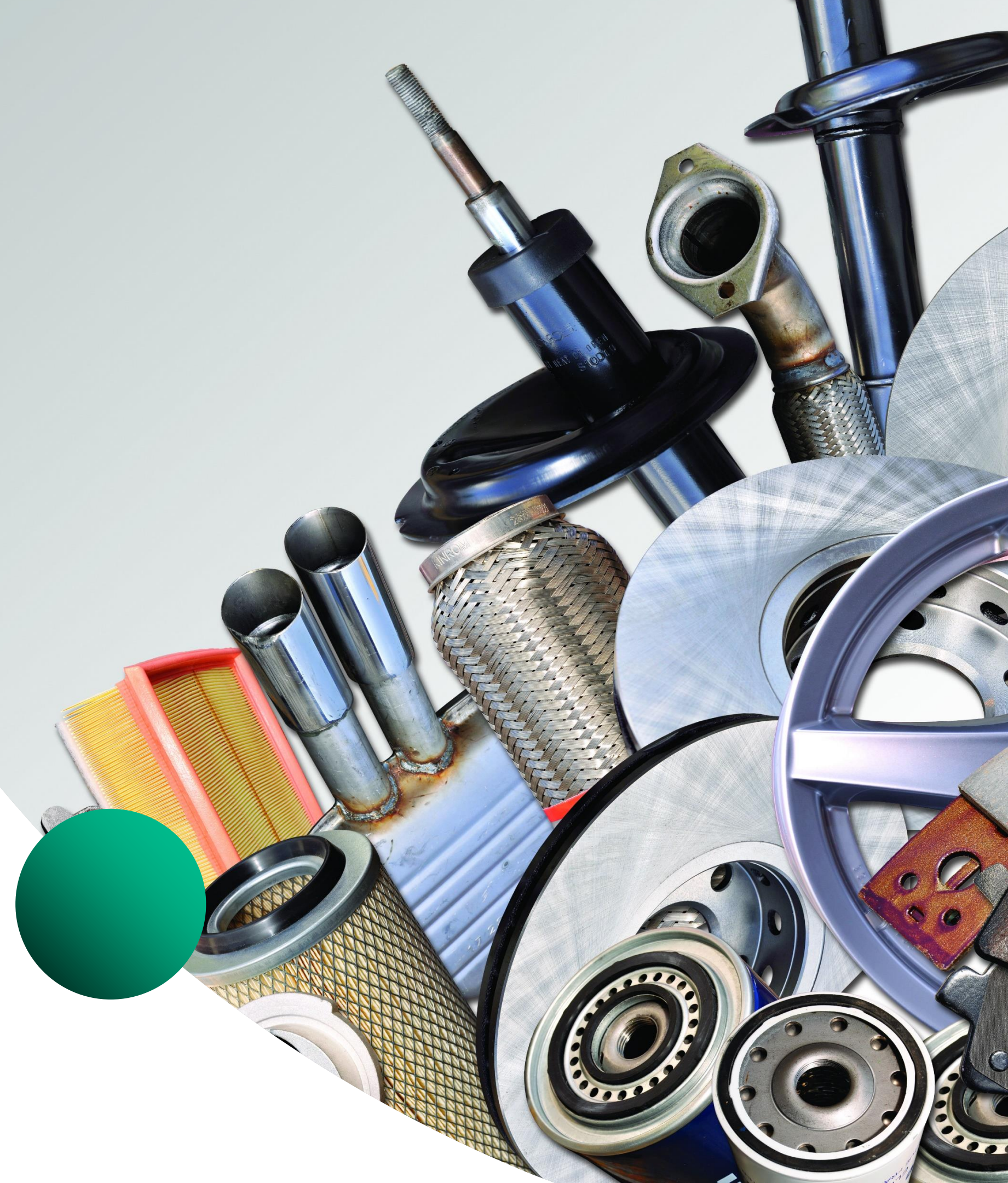


Auto Parts Online Market

Public Version



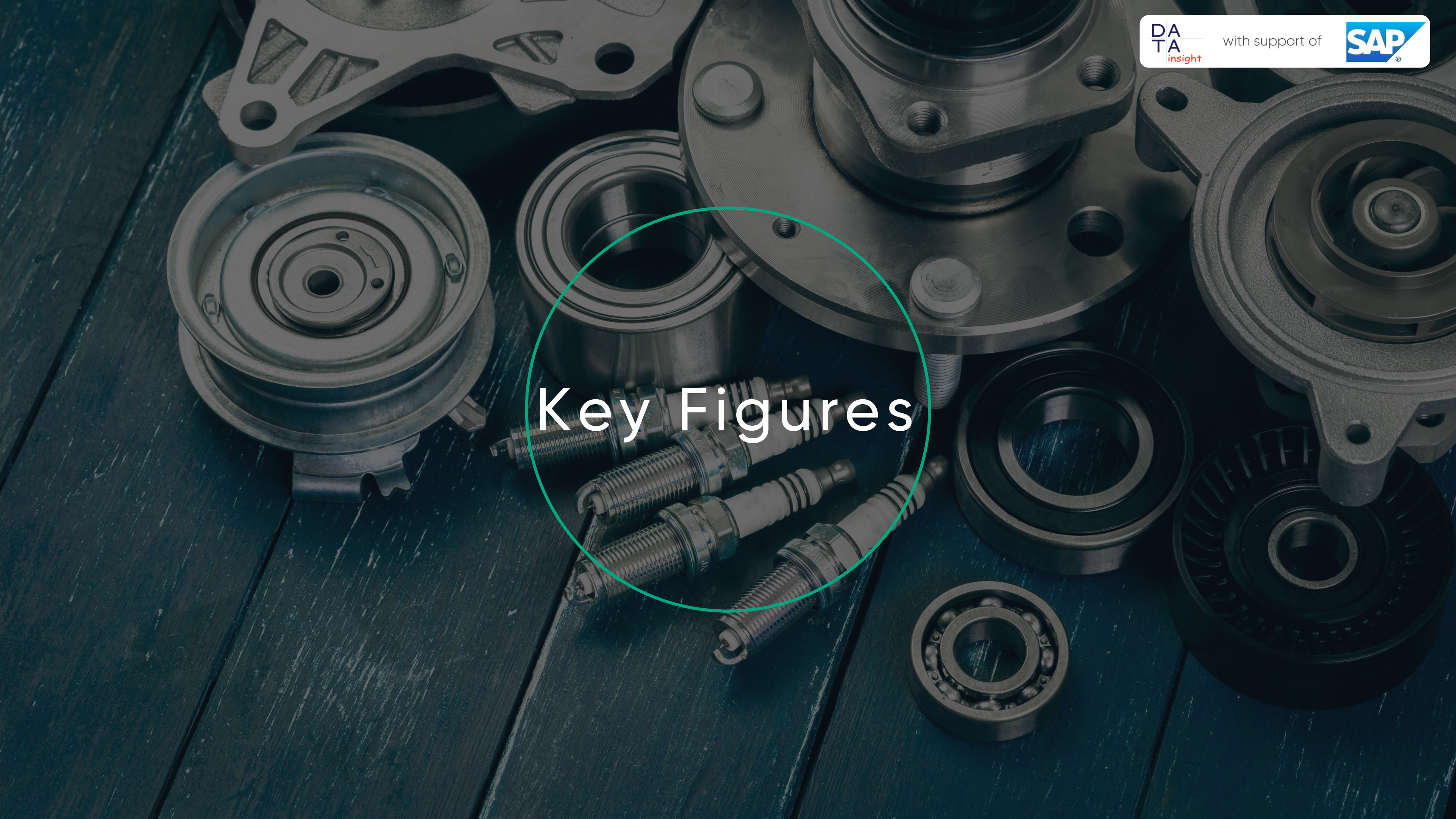
with support of



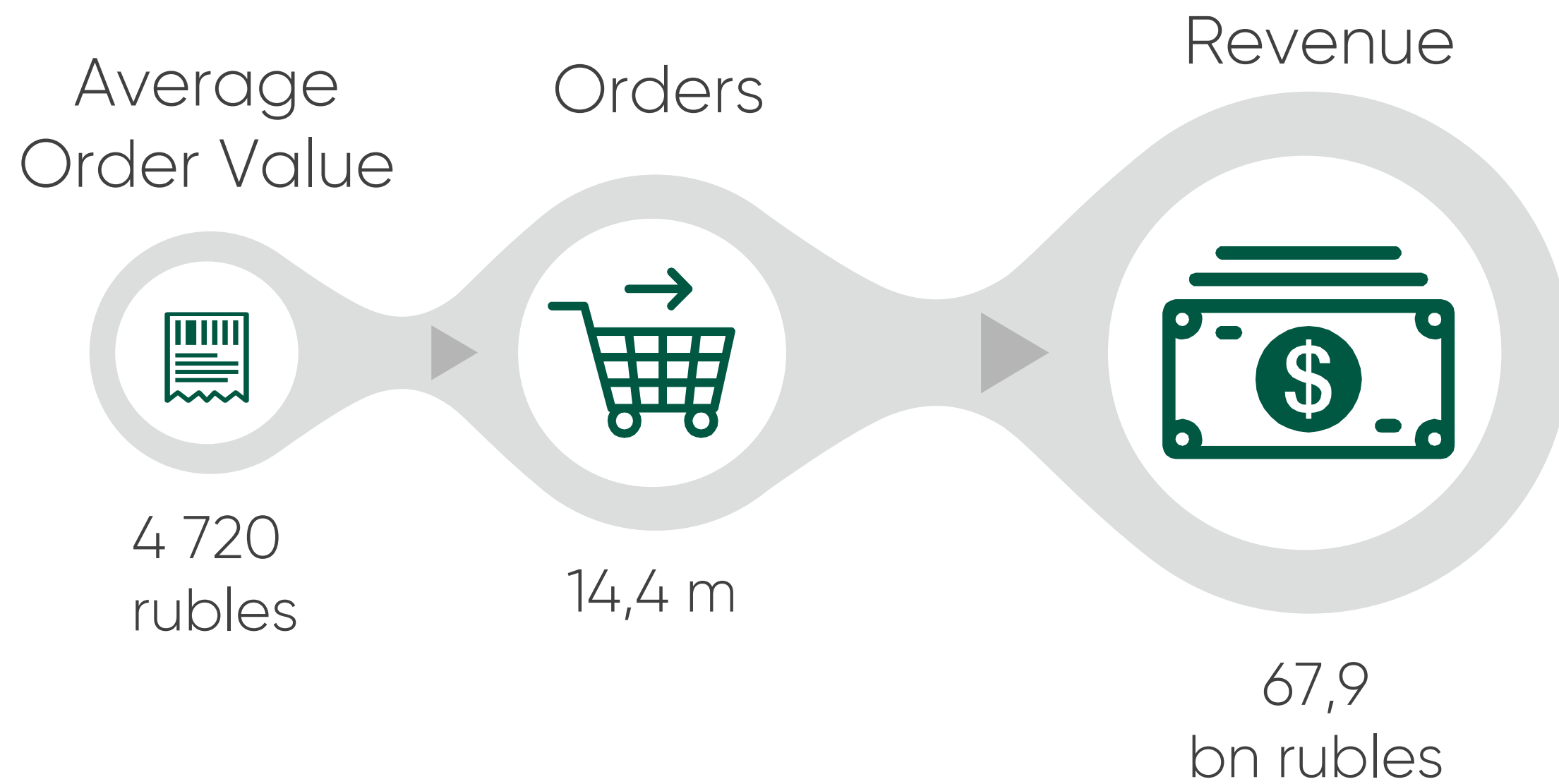
Research Methodology

1. The report examines auto parts online market, i.e. online retailers selling auto and moto parts, tyres and wheels, car electronics, auto accessories and tuning details.
2. An online store is a website or mobile app where users can place orders by filling out a form or by adding products to a virtual cart. Online sales of Russian retailers only are taken into account (via Russian websites and mobile apps) without online sales of foreign retailers, multi-category stores and marketplaces.
3. The data in the report covers all online retailers of auto parts that are members of Russia's eCommerce TOP1000 list (for the year 2019, by number of orders). The number of such retailers is 82. Estimates for the number of online orders are based on regular monitoring of online retailers, data provided by retailers themselves, or information found in the public domain.
4. We are applying automatic parsing to determine which third-party services are used by online stores. In difficult cases, we are layering in manual analysis. The listing of marketing services includes main solutions for every store from TOP10.

Key Figures



Auto Parts Online Market Size



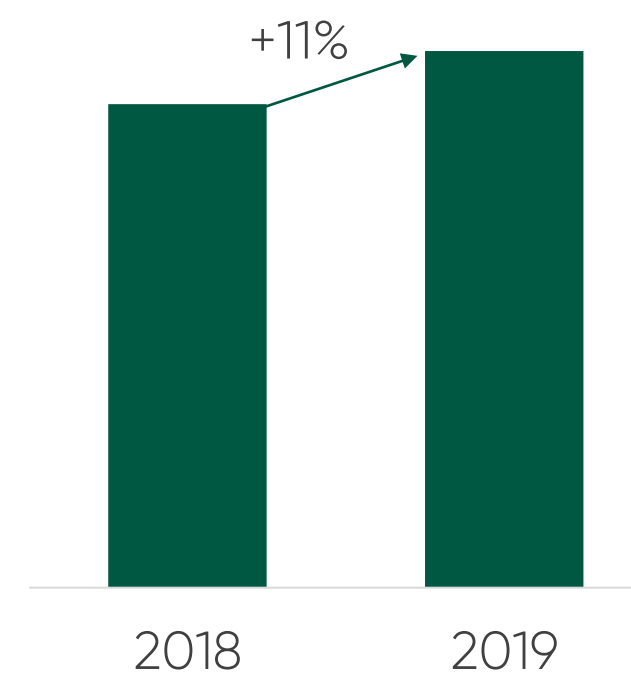
For the year 2019, online retailers of auto parts (82 retailers making eCommerce TOP1000 list) received **14,4 million orders** amounting to **67,9 billion rubles**. The average order value (AOV) was **4 720 rubles**.



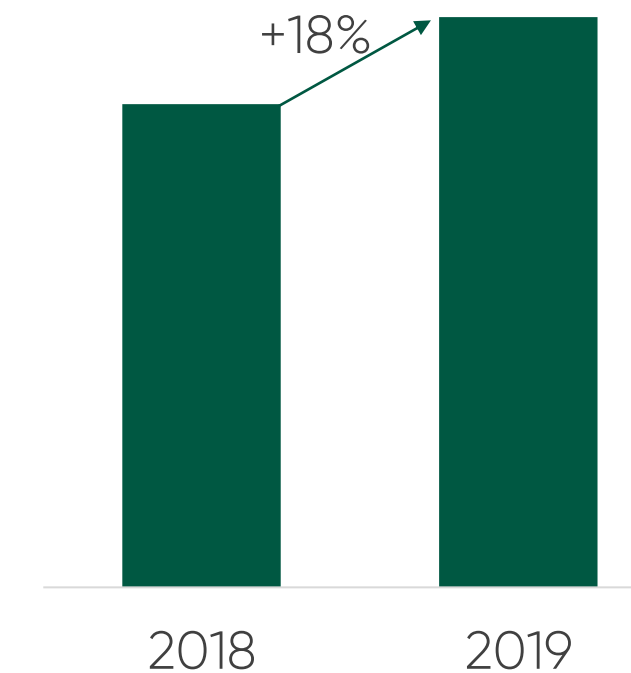
Market Dynamics

For the year 2019, the number of orders in auto parts online stores grew by **11%**, and the amount of online sales increased by **18%**. AOV rose by **7%**.

Orders



Revenue



Number of
orders



Revenue

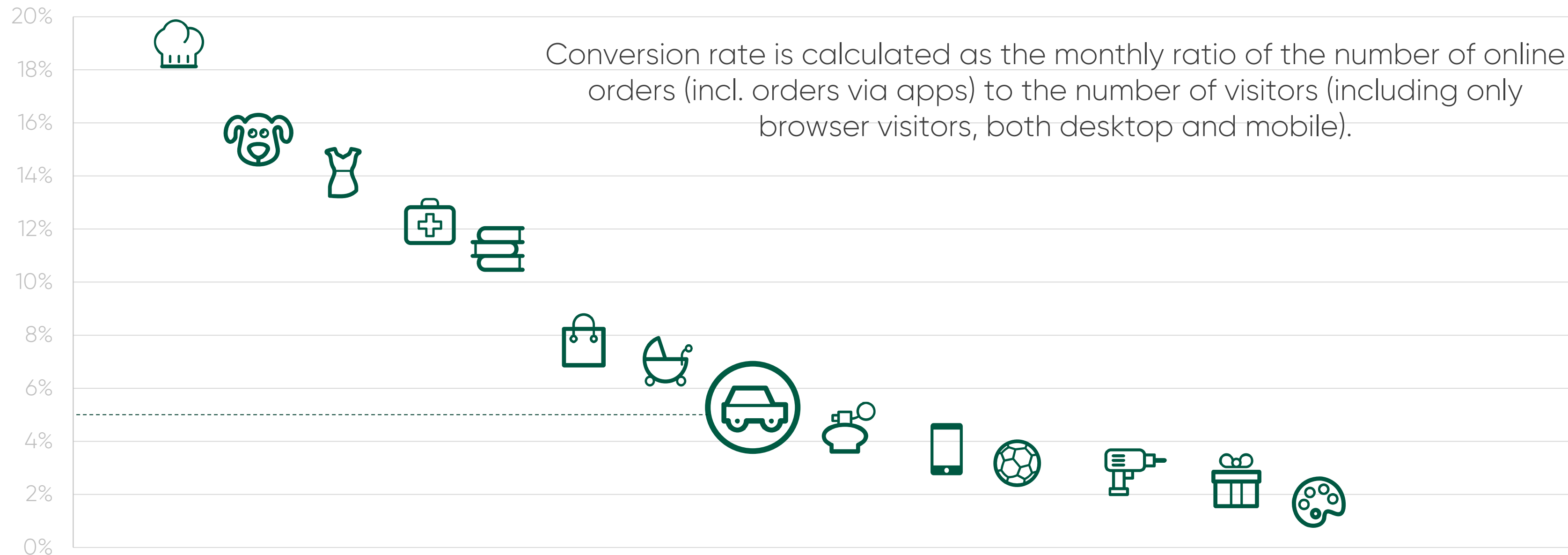


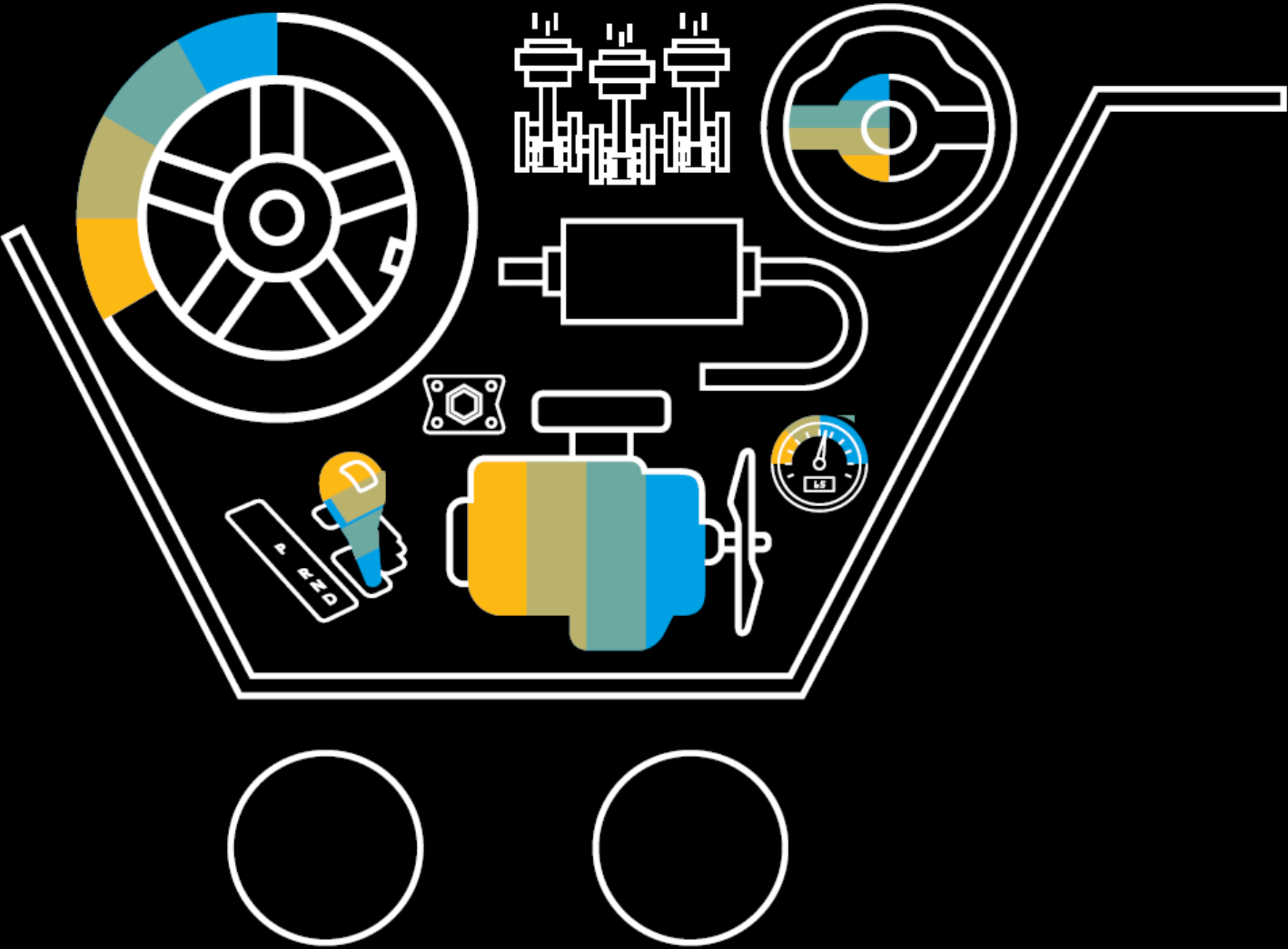
The Share of Auto Parts Online Stores in eCommerce Market

For the year 2019, online retailers of auto parts stand for **3%** of all domestic online orders and **4%** of related online sales volume.

Average Conversion Rate of Online Stores

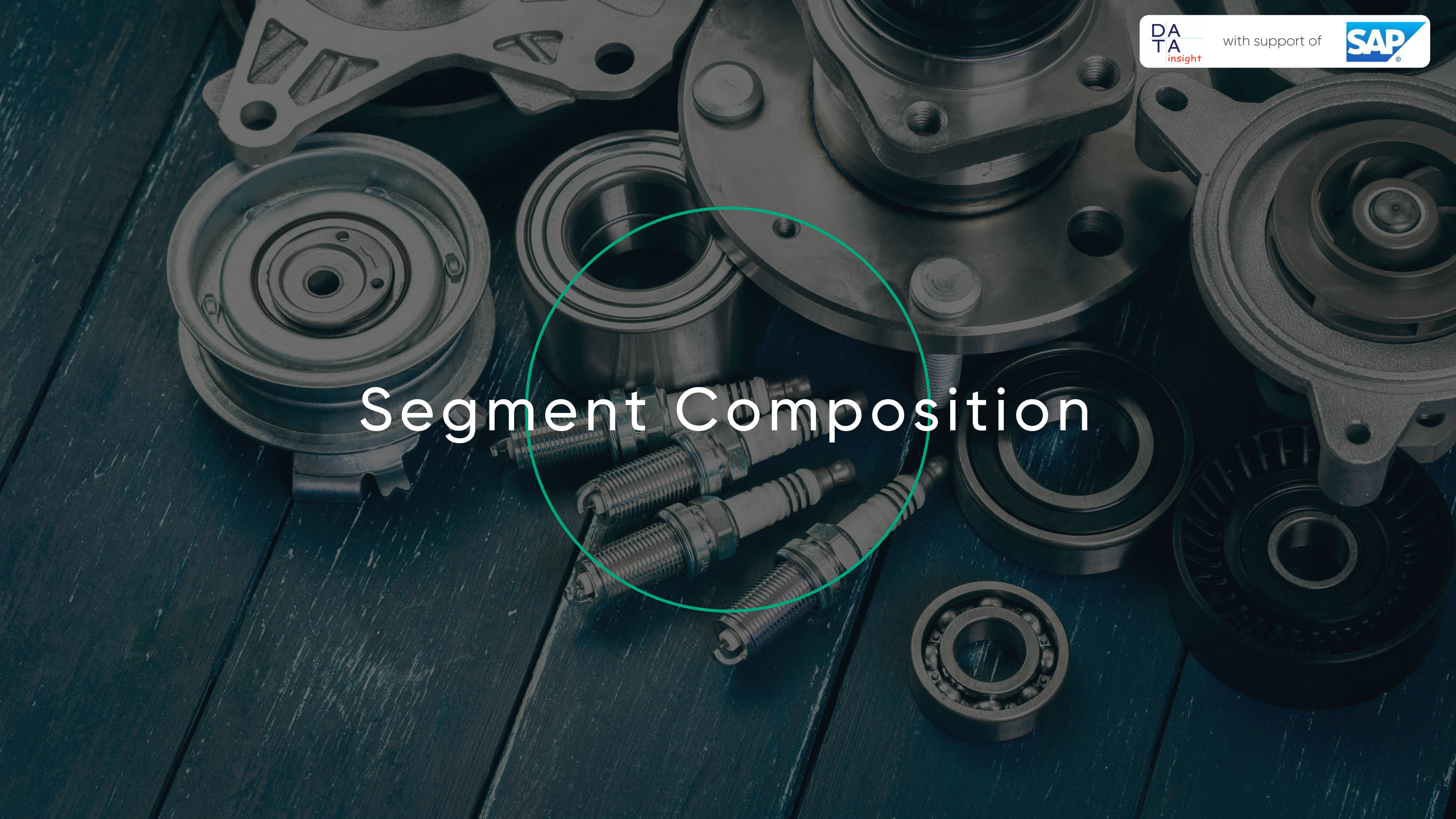
In the auto parts segment, the conversion rate is **5,2%**. The nearest rates are in the segments of children's goods and cosmetics— 7,0% and 4,6% respectively.





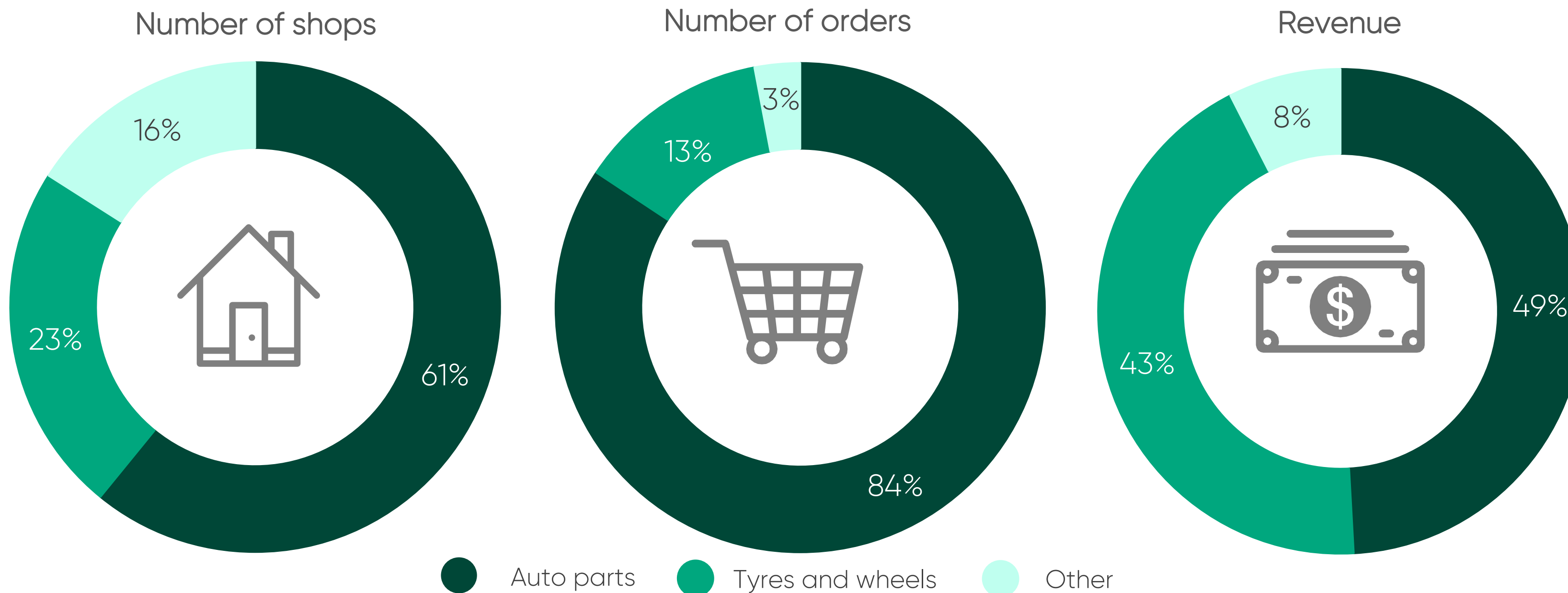
SAP Commerce Cloud Leading eCommerce Platform

Segment Composition



Segment Structure

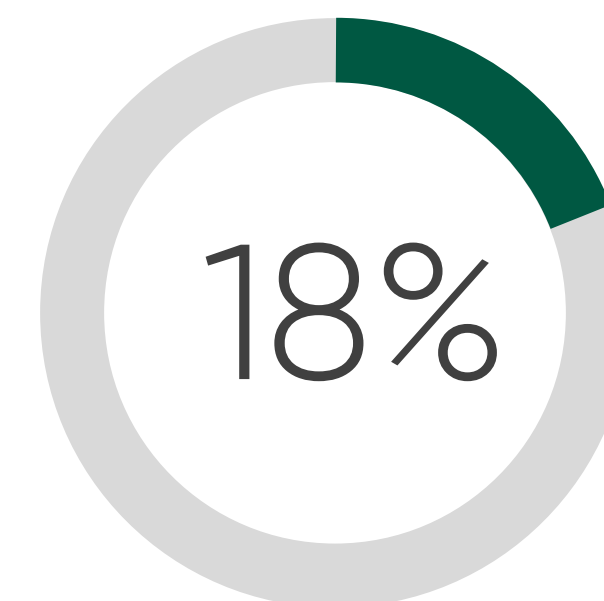
List of TOP1000 online sellers includes 82 auto parts online retailers. More than 3/5 (61%) of them sell auto parts only. 84% of orders and 49% of revenue come from such stores. Sellers of tyres and wheels generate comparable share of revenue (43% of the segment) – small number of orders is compensated by high AOV.



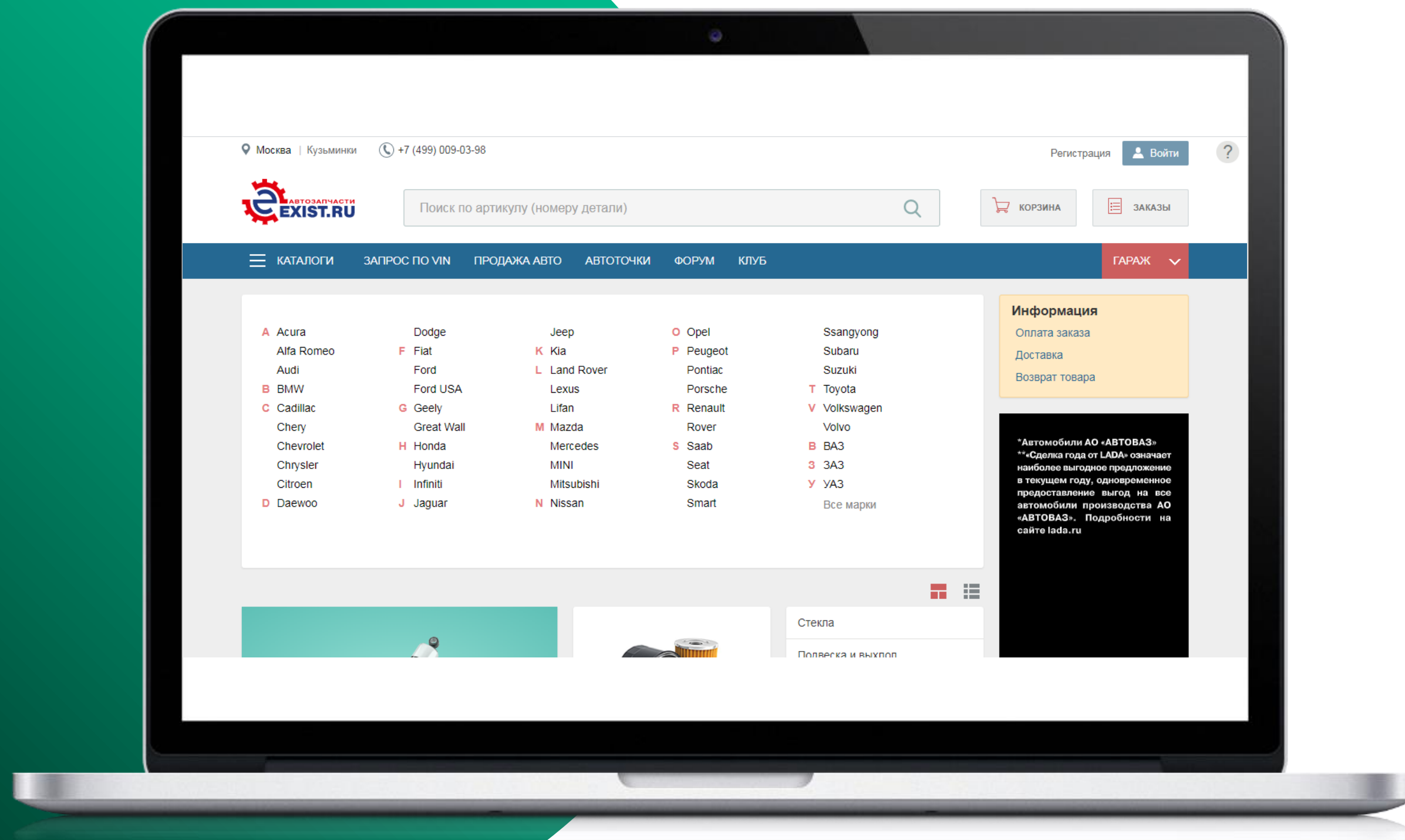
* «Other» includes: «Auto accessories and tuning details», «Moto vehicles and accessories» and «Auto electronics» categories

Key Player Exist.ru

Exist.ru share among the auto parts online stores* for the year 2019 (by volume of online sales):






* Considering online retailers making eCommerce TOP1000 list by the number of orders, without "long-tail" figures (retailers outside general TOP1000)

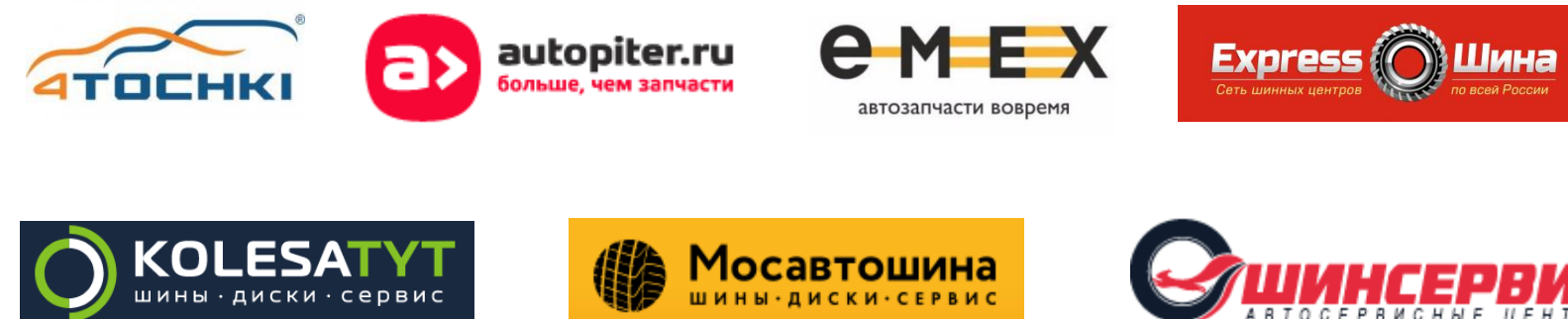




TOP10 Market Players*

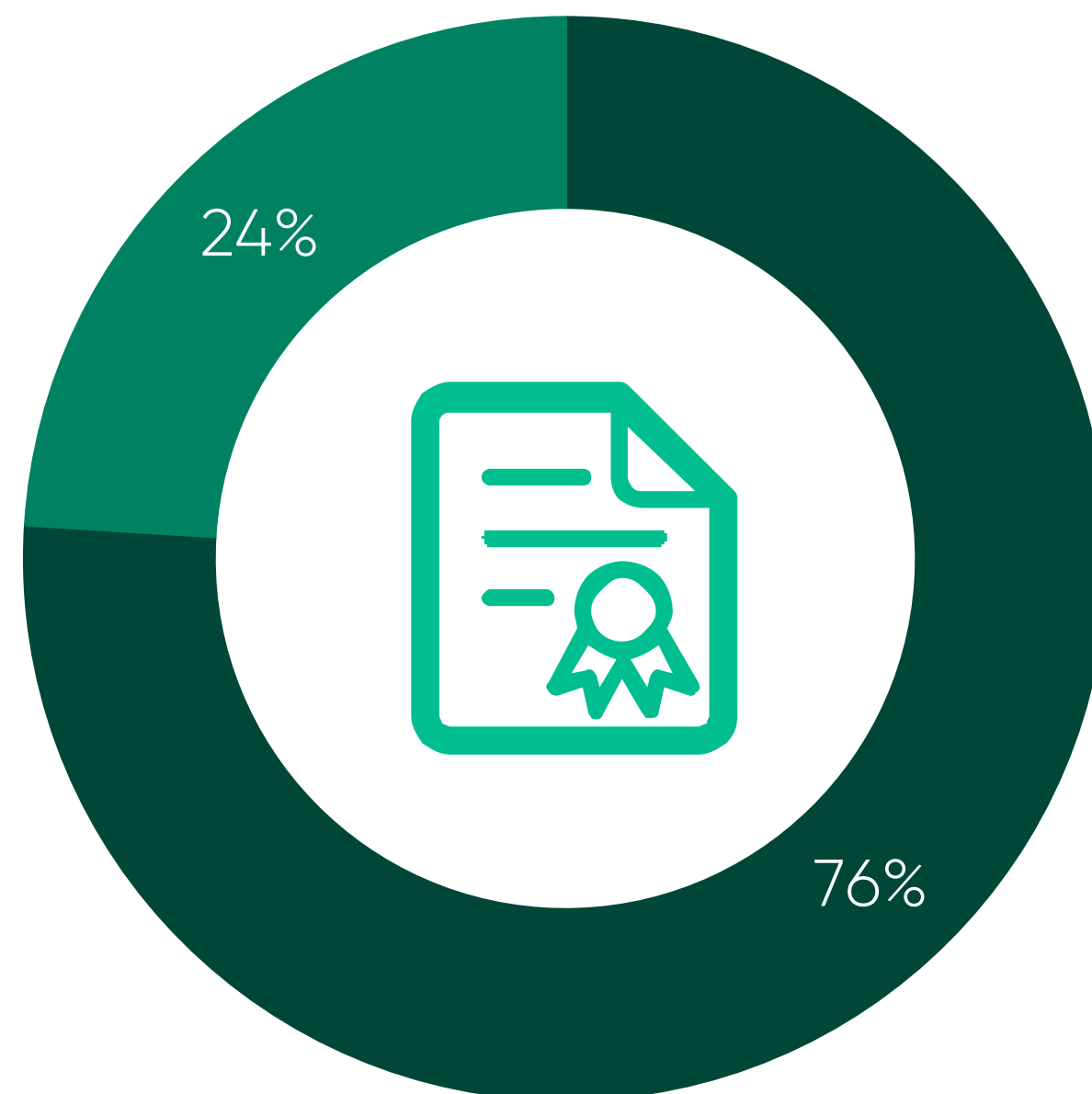
1.  **EXIST.RU** Exist.ru
2.  **kolesadarom** Kolesa-darom.ru
Интернет-магазин шин №1 в России *
3.  **autodoc.ru** Autodoc.ru

Other online stores in TOP10**:



* By volume of online sales

**In alphabetic order by domain name

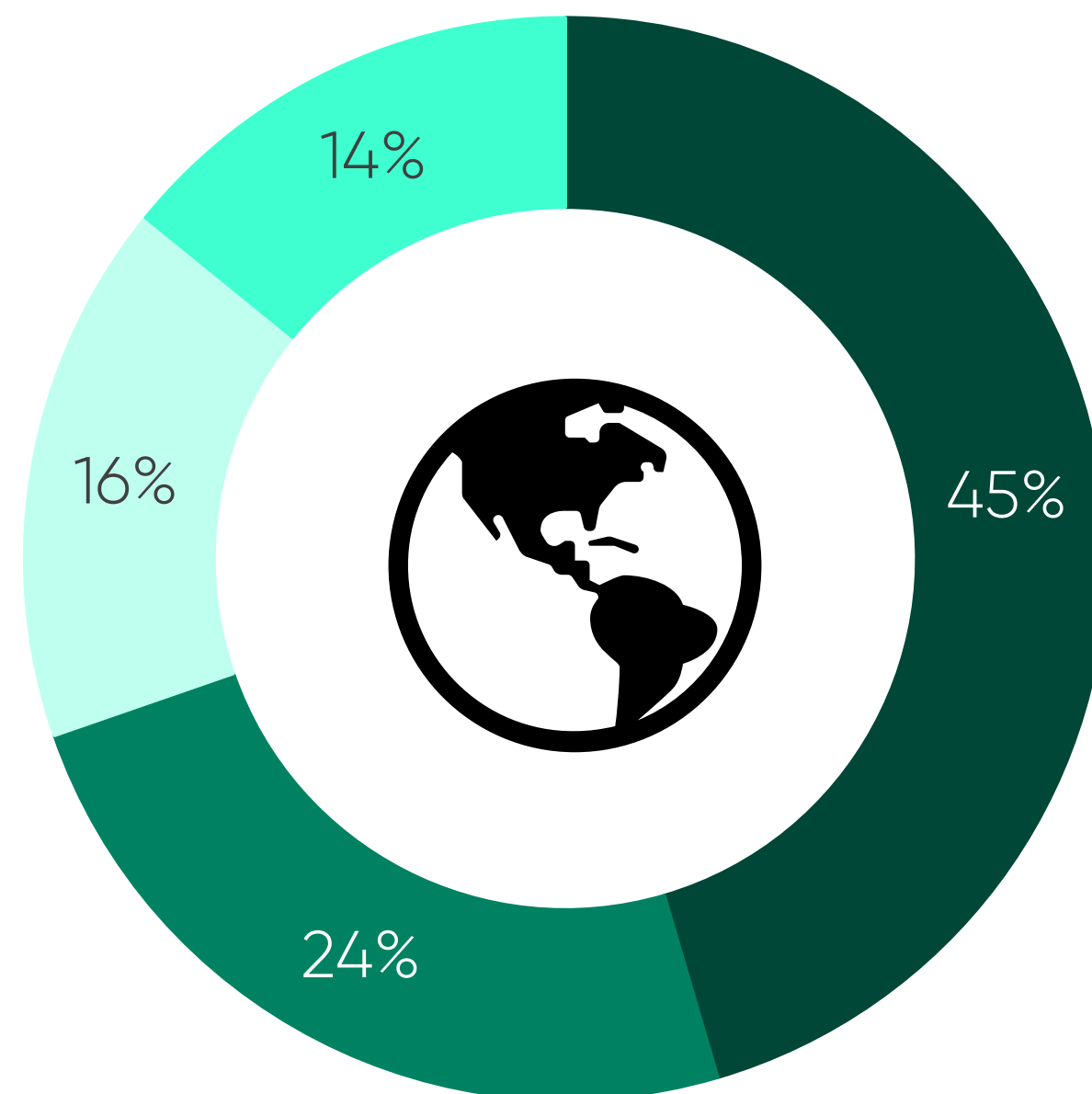


■ LLC/JSC

■ Individual entrepreneur

Retailers by Legal Status

76% of the auto parts online retailers are companies (LLC/JSC). 24% are registered as individual entrepreneurs.



- Moscow and Moscow region
- Ural, Siberia, Russian Far East
- Saint-Petersburg and Leningrad region
- European part of Russia and South regions

Online Retailers Geography*

45% of the 82 largest online stores in the segment (TOP1000 participants) are registered in Moscow or the Moscow region. 16% are based in Saint Petersburg or Leningrad region. 24% is accounted for by Ural region and Asian part of Russia and 14% are registered in European part of Russia and South regions. The share of Moscow and Moscow region in auto parts segment is lower than in any other segment.

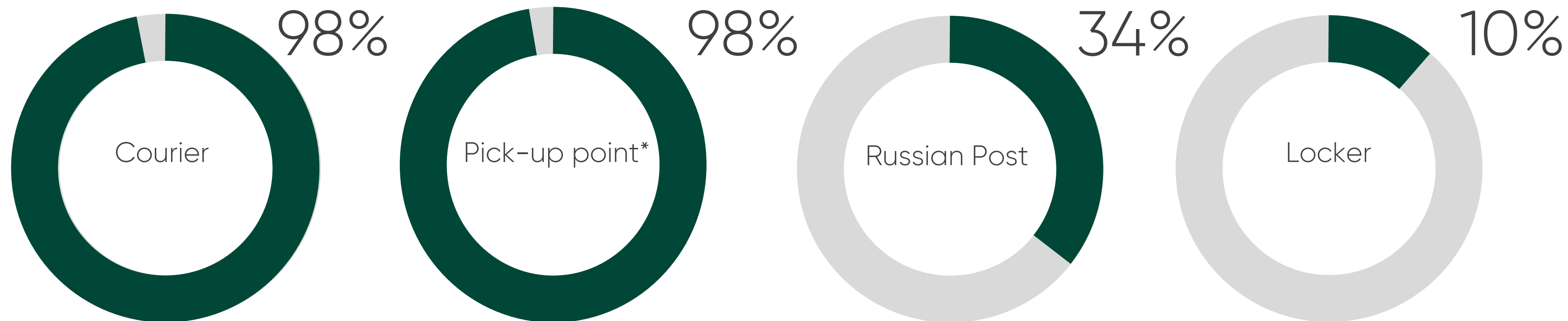
* According to place of online store registration

Delivery



Delivery Methods

Share of online stores using different delivery methods



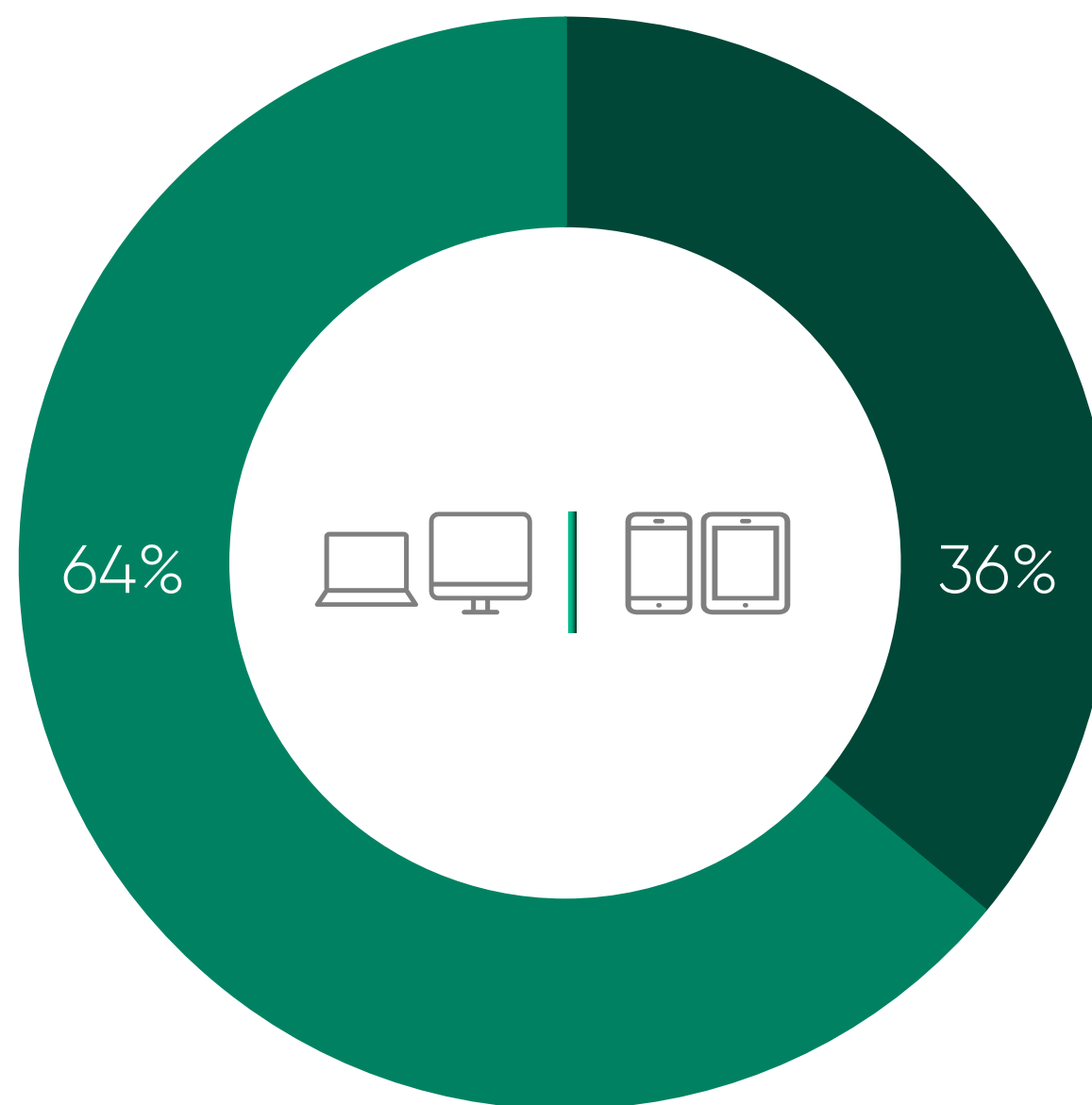
5% of auto parts online stores use all delivery methods mentioned above (all these stores are out of TOP10)

*Pick-up point - pick-up from all non-automated (with employees) pick-up points, including company stores.

Mobile Commerce



Desktop vs Mobile



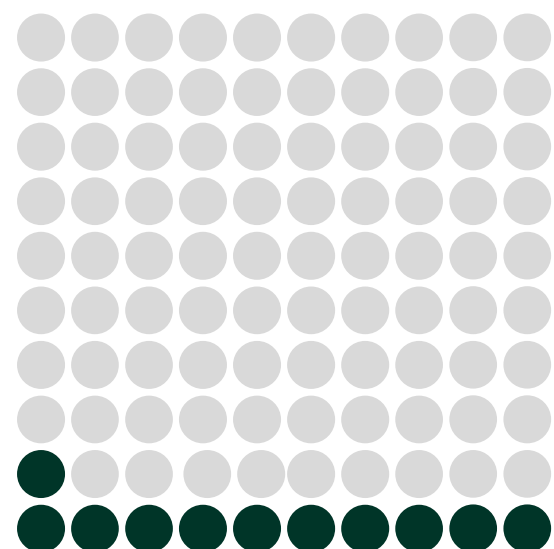
About 2/3 of all visits to auto parts online stores comes from desktop.



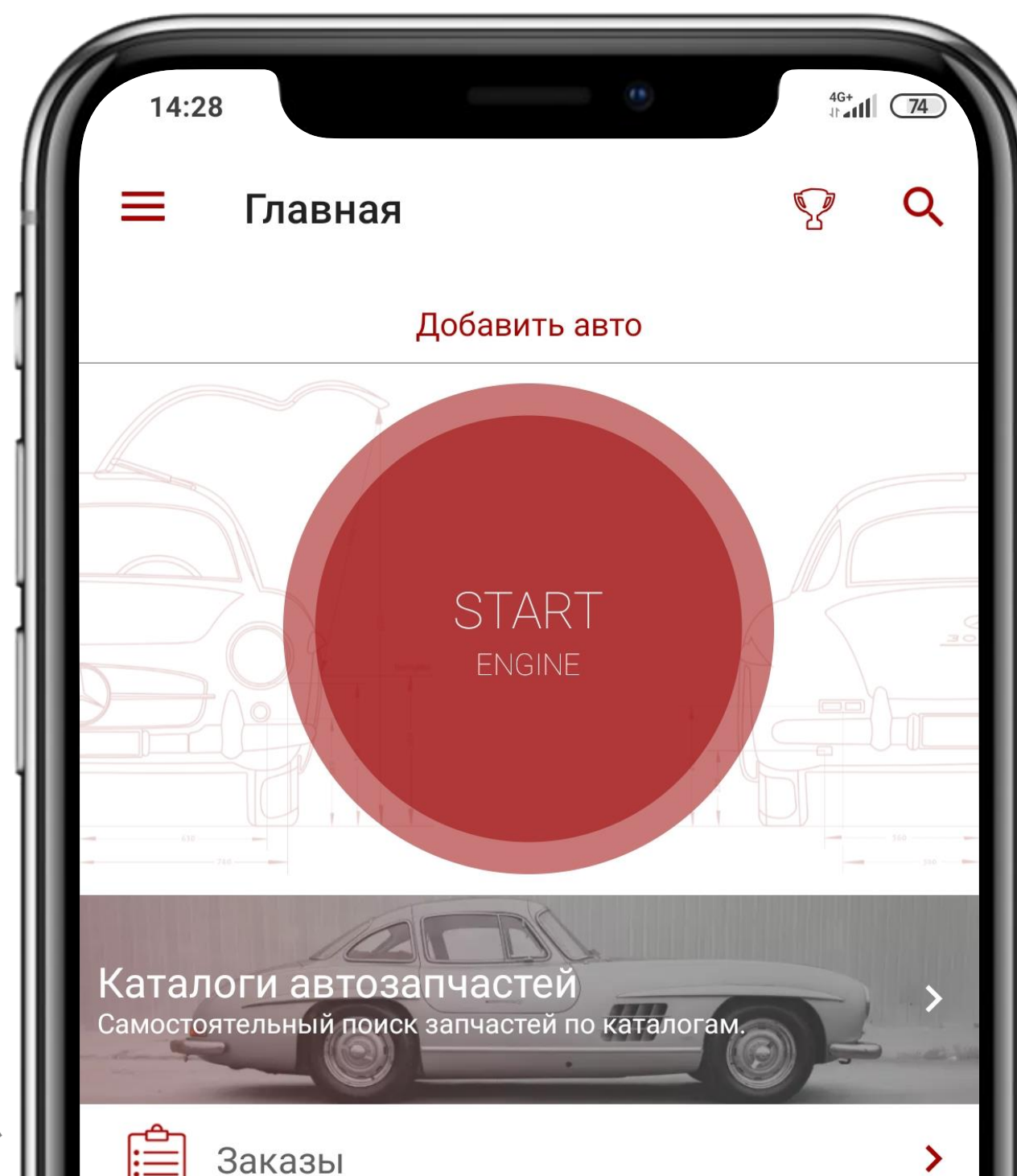
Mobile Apps

The most popular app belongs to Autodoc.ru – more than 1 m downloads in Google Play Store.

11%

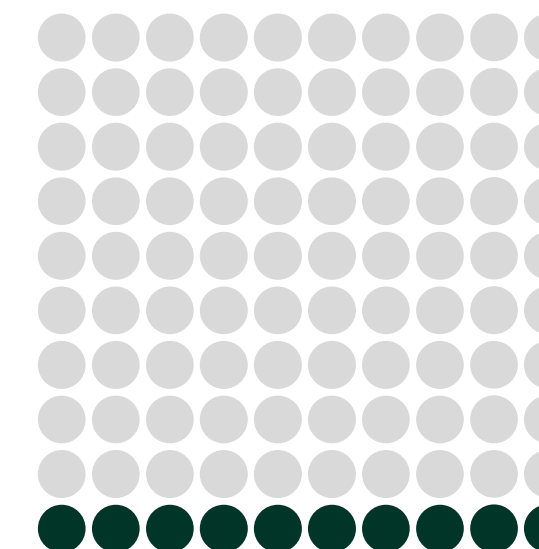


Share of auto parts online stores with apps in the Google Play Store



Autodoc.ru app →

10%



Share of auto parts online stores with apps in the iOS App Store

Customer Acquisition Channels





Share of Traffic

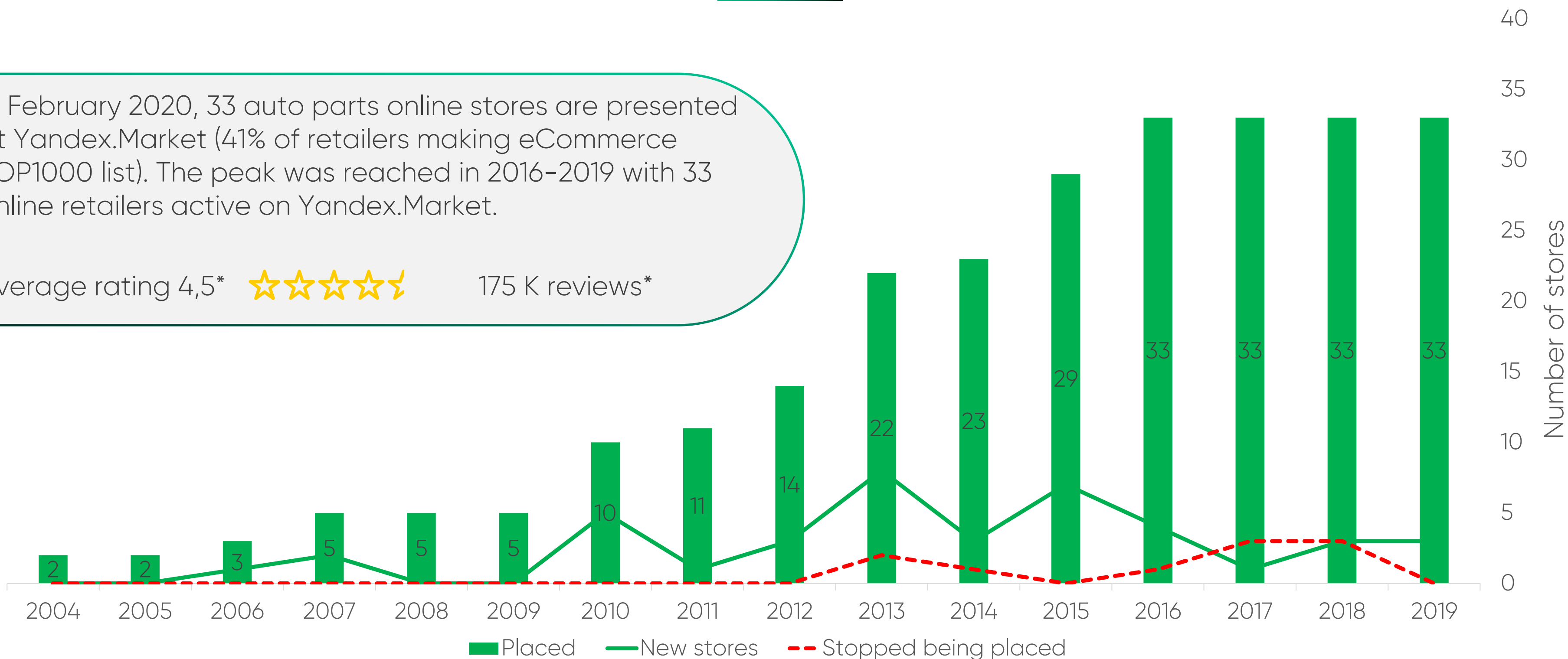
Traffic sources of auto parts segment are similar to average numbers of eCommerce traffic structure, except of higher organic search values.

According to SimilarWeb data; average figures for 82 online stores are shown without store's "weight" in general traffic of segment

Presence in the Yandex.Market

In February 2020, 33 auto parts online stores are presented at Yandex.Market (41% of retailers making eCommerce TOP1000 list). The peak was reached in 2016-2019 with 33 online retailers active on Yandex.Market.

Average rating 4,5*  175 K reviews*

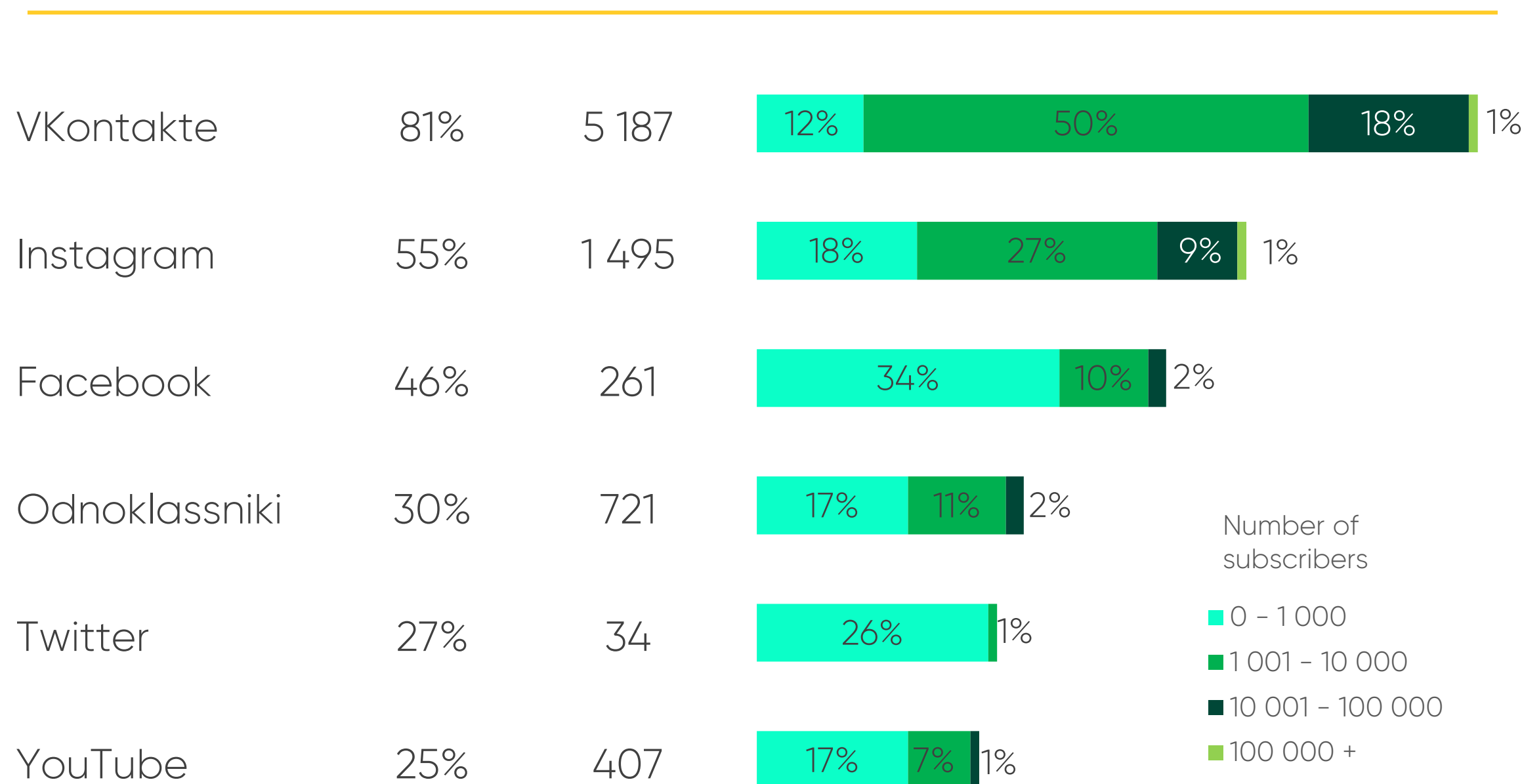


*Average rating for all reviews on Yandex.Market in February 2020
 The data is calculated for 82 online retailers of auto parts (TOP1000 participants in February 2020)

Social Networks Activity

The most popular social network for online retailers of auto parts is VKontakte. 81% of stores have active accounts on VKontakte, and 19% of these accounts have more than 10 000 subscribers.

Distribution of online retailers by the number of subscribers in social networks



Number of subscribers

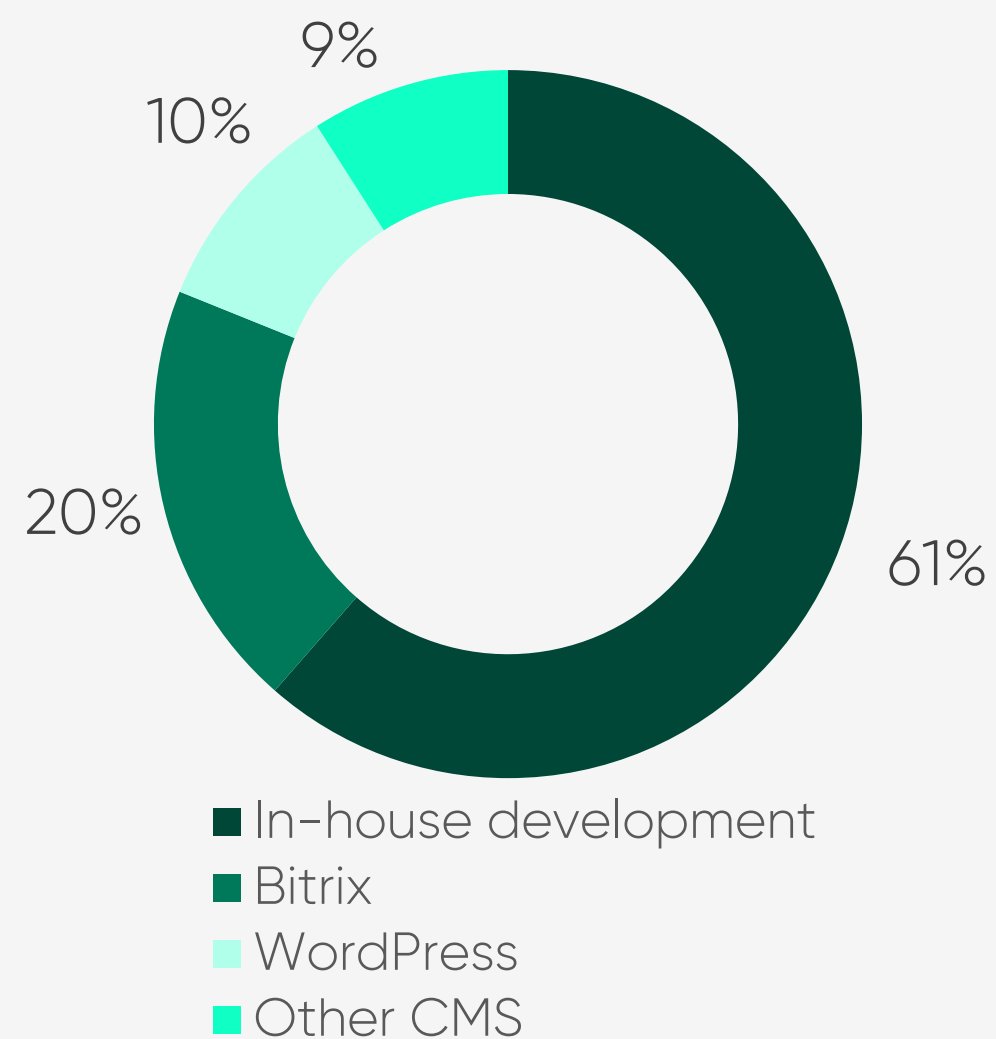
- 0 - 1 000
- 1 001 - 10 000
- 10 001 - 100 000
- 100 000 +

*The percentage of online stores using the respective social network and median of number of subscribers are specified

Technology

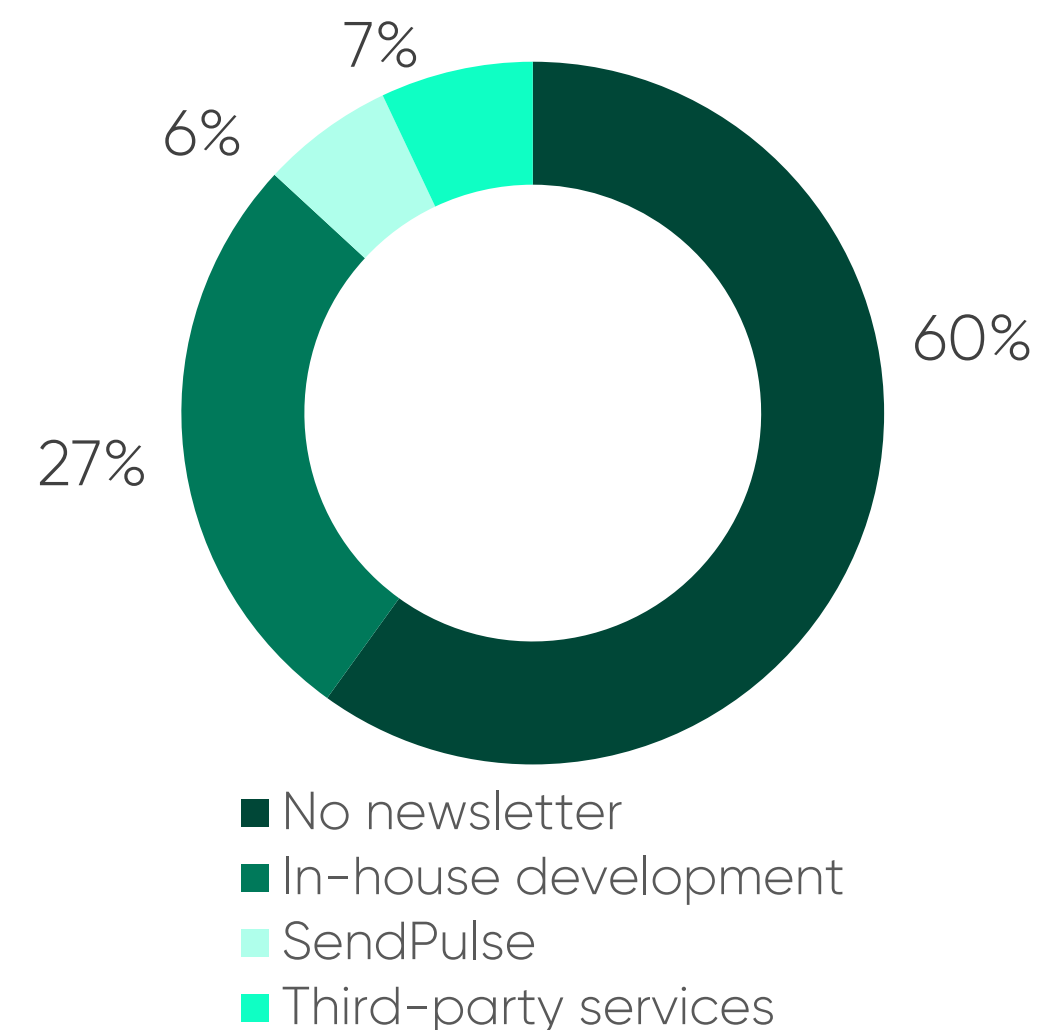


CMS



61% of auto parts online stores use in-house CMSs (Content Management System). 20% of online stores use Bitrix, 10% use WordPress and 9% use another CMSs.

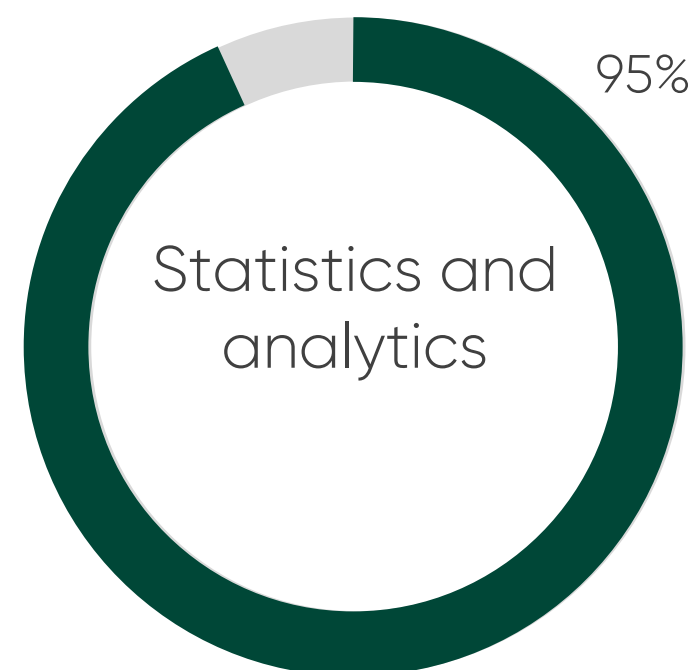
Newsletter



60% of auto parts online stores do not send newsletters about their special offers and promotions. 27% use in-house email-systems. 6% use SendPulse. 7% of online stores use third-party services.

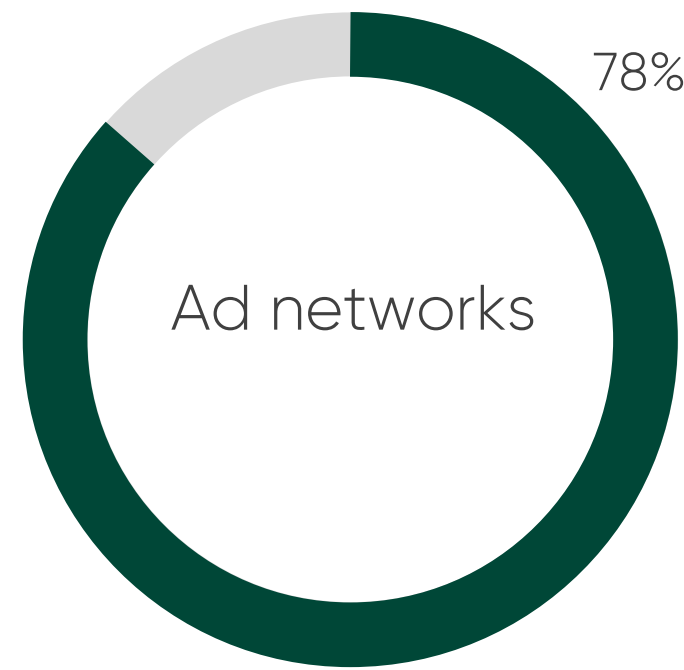
Marketing Services

Share of online stores using marketing services



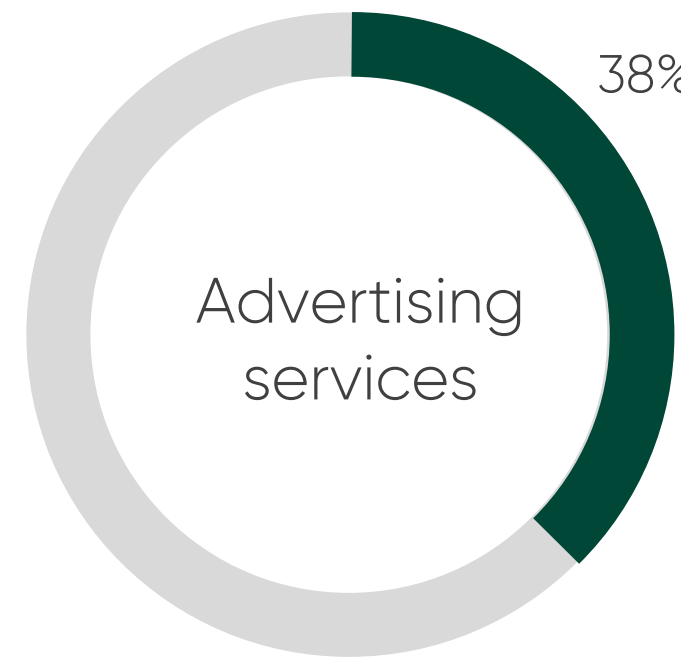
Yandex.Metrics, Google Analytics, calltracking systems, other services that track traffic and customers behavior on the website.

🏆 Yandex.Metrics – 95%



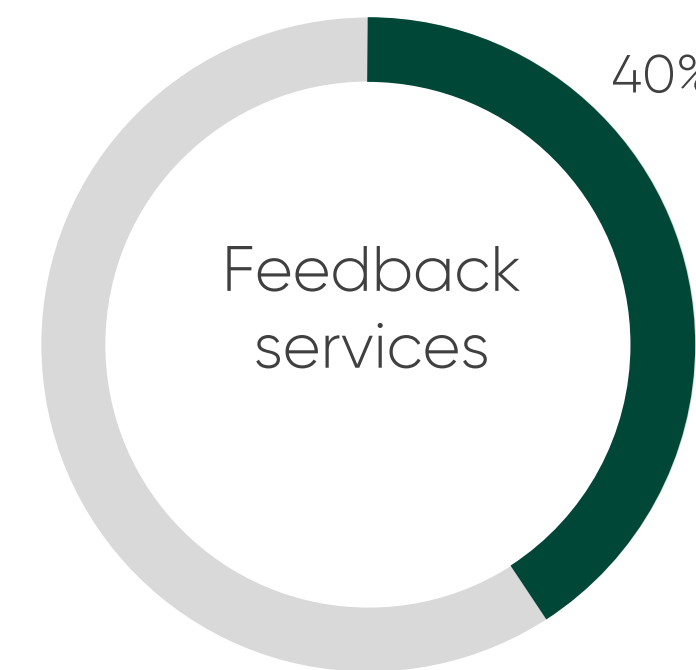
Networks for placing ads on pages of other ad network participants.

🏆 DoubleClick (Google Display & Video 360) – 67%



Advertising management and personalization services.

🏆 Facebook Custom Audiences – 22%



Online and email communication, callback services.

🏆 JivoSite – 24%

News



News in Russia 2019

March

[«Lukoil» started selling car oils on eBay](#)

May

Alarmstore case: how [performance-marketing helps auto electronics online store enter federal market](#)

[Online/offline symbiosis](#): interview with Nissan Russia representatives

June

Admitad: [the most expensive online order](#) in 2019 was made in auto parts category

July

[Auto parts export from Russia through eBay grew by 50%](#)

September

[AliExpress started selling car parts from Russian stock](#)

Experts predict [increasing prices on tyres because of marking](#)

October

[Beru marketplace added car parts in assortment](#)

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World News 2019

February

Online auto parts and accessories [sales are projected to grow 16% in 2019](#)

Hedges & Co. Analysis: [More Than \\$148 Billion In Auto Parts & Accessory Sales Influenced By Digital In 2019](#)

May

[eBay Promote Listings update for Vehicle Parts and Accessories](#)

June

Belorussia developers launched [online service for auto parts search](#)

July

[BP Ventures Invests In E-Commerce Automotive Technology Developer PartsTech](#)

August

[360° Online Imagery Sells More Auto Parts](#)

October

[E-Commerce Automotive Market Is The Next Big Thing](#) And The US Auto Parts Network Is The Player To Pay Attention On

November

[Online sales of automobile components steal a march over offline sales](#)

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Full Version

- ✓ TOP10 by the number of **online orders**
- ✓ TOP10 by the **revenue**
- ✓ TOP10 be the number of **visitors** (with dynamics)
- ✓ **Conversion** in TOP10
- ✓ **Technologies** for TOP10
(CMS, email, marketing services)
- ✓ **Mobile traffic** share in TOP10
- ✓ **Mobile apps** overview
- ✓ **Customer acquisition channels** for TOP10
- ✓ Pivot with **visitors' numbers, conversion, online orders, AOV and revenue** for TOP10

 Volume: 50 slides

 Time: 2 days after payment

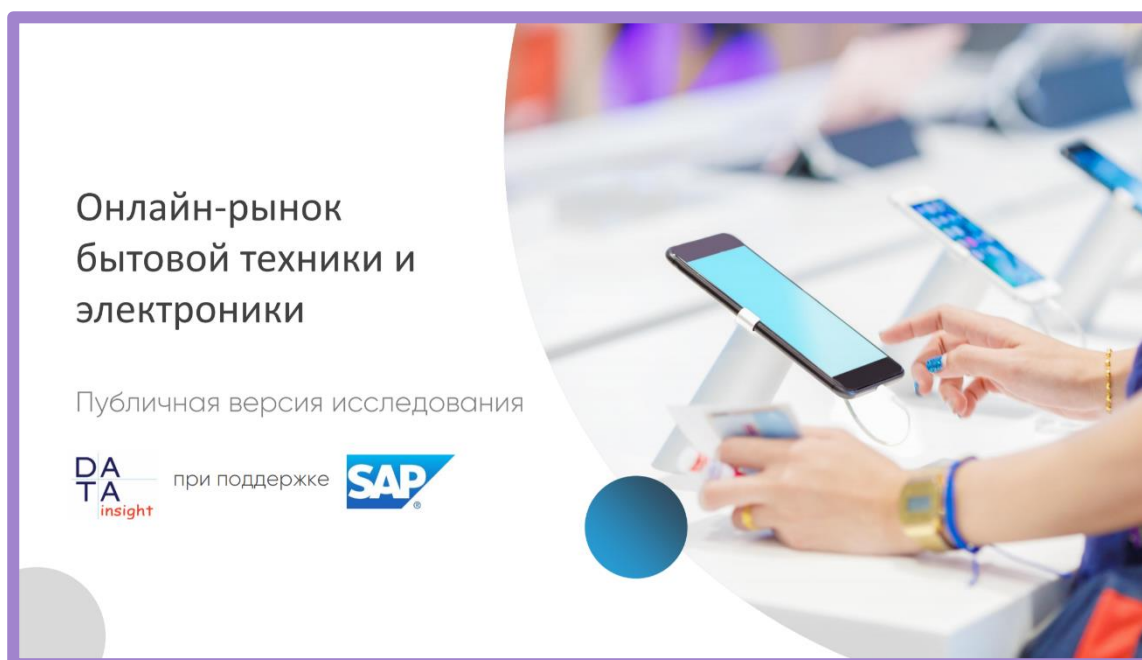
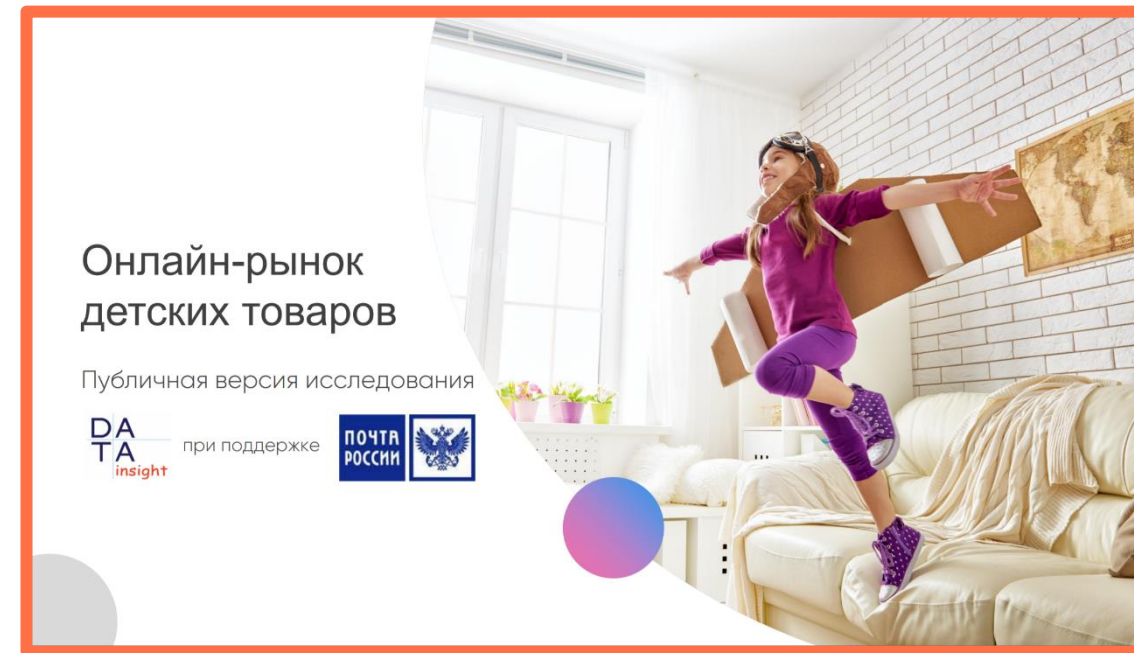
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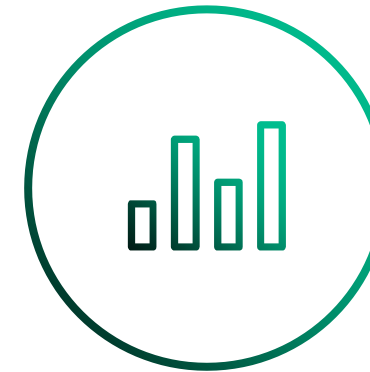
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