

# EGYPT AUTOMOTIVE MARKET

## Strategic Analysis & Growth Opportunities

Vehicle Parc | Aftermarket Services | EU & Africa Trade | Manufacturing Potential

April 2026

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# AGENDA



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Egypt automotive overview

2

Trade with EU and its changing dynamics

3

Trade with southern Africa and its future potential

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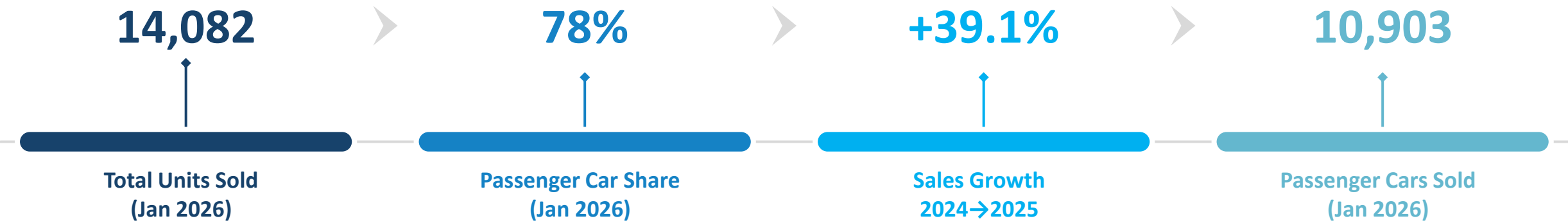
Resilience in the time of geopolitical crisis - Frost Framework for growth

5

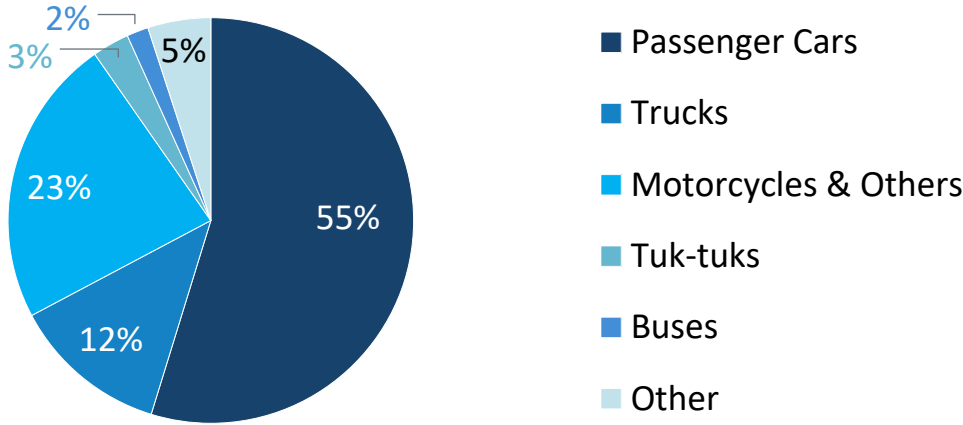
Growth benerator platforms that enable our clients towards exponential growth

# EGYPT'S VEHICLE MARKET SURGES IN JAN 2026: TOTAL SALES UP 39% YOY ACROSS ALL SEGMENTS

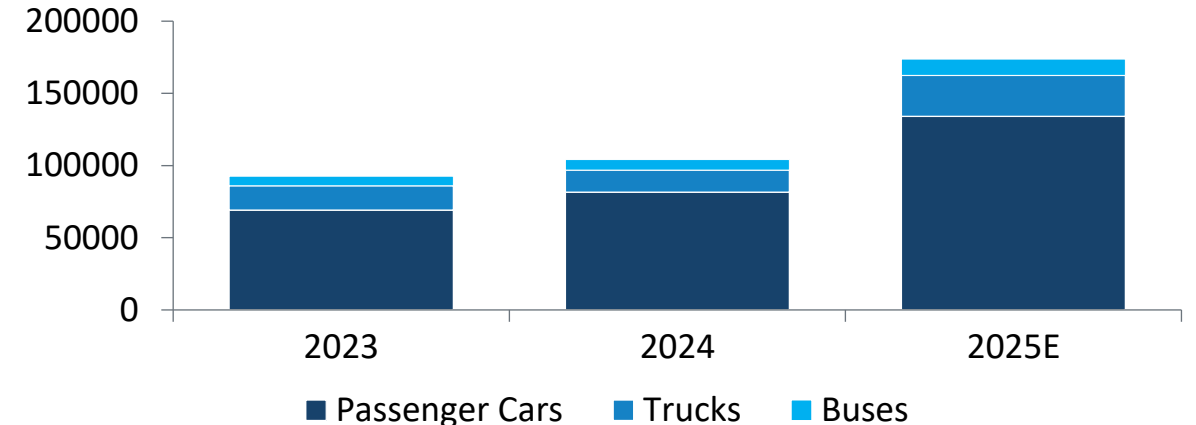
## Vehicle Sales Analysis |



## Vehicle Parc by Type (2026)




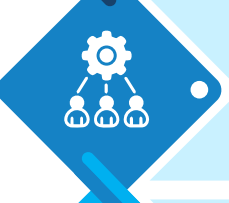

## New Vehicle Sales by Segment (Units)




Source: CAPMAS; OICA; AMIC Egypt January 2026 Report; TheGlobalEconomy.com; Ahram Online (2024–2026)

# EGYPT'S AUTOMOTIVE SERVICE INDUSTRY IS FRAGMENTED BETWEEN OEM NETWORKS & INDEPENDENT WORKSHOPS

## Aftermarket Industry Structure

		Typical Customers	Market Share
	<b>OEM Service Centers</b>	Dealer-operated workshops tied to vehicle brands. Capture vehicles under 3–5 year warranty periods.	
	<b>Organized Multi-Brand</b>	Chain workshops servicing multiple brands. Growing segment capitalizing on post-warranty vehicles.	
	<b>Independent Garages</b>	Small local workshops dominating the landscape due to cost-competitiveness and accessibility.	
		New vehicles (0–5 yrs)	~25%
		Mid-age vehicles (5–10 yrs)	~20%
		Older vehicles (10+ yrs)	: ~55%



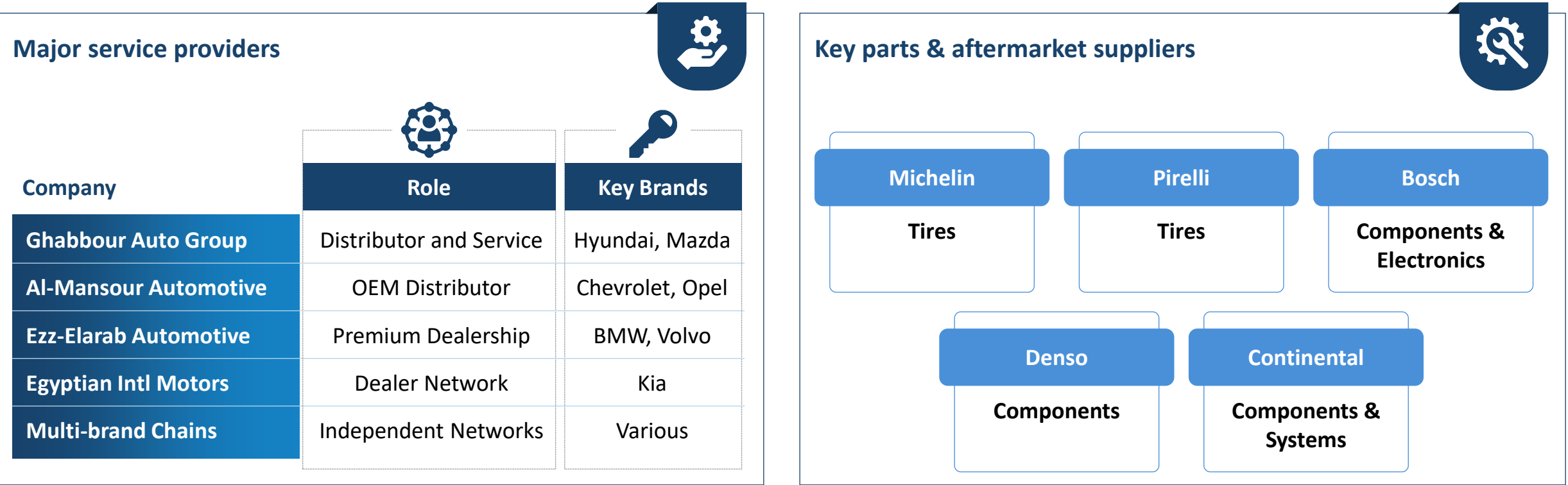
Key Driver: Aging vehicle fleet + economic pressure extends vehicle ownership → sustained aftermarket demand across all channels

Source: Ken Research – Egypt Automotive Aftermarket Service Industry Report (2024)



# LARGE DEALERSHIP GROUPS AND INTERNATIONAL PARTS SUPPLIERS DOMINATE THE ORGANIZED SERVICE MARKET

## Competitive Landscape





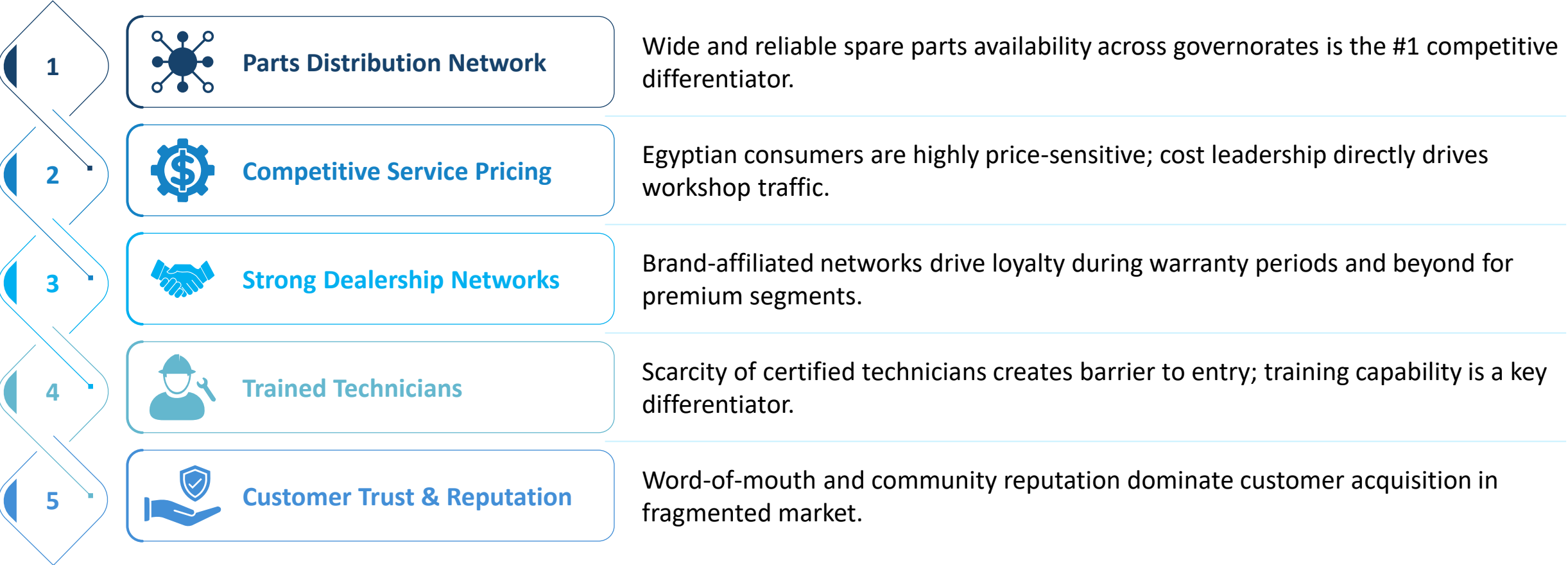
**Market Consolidation Opportunity:**

The Egyptian aftermarket remains highly fragmented with independent garages holding ~55% share. Organized players with strong parts supply chains and digital booking capabilities are well-positioned to capture share from independents as vehicle complexity increases with EV adoption.

Source: Ken Research – Egypt Automotive Aftermarket Service Industry Report (2024)

# COST EFFICIENCY, PARTS AVAILABILITY, AND CUSTOMER TRUST ARE CRITICAL SUCCESS FACTORS IN EGYPT

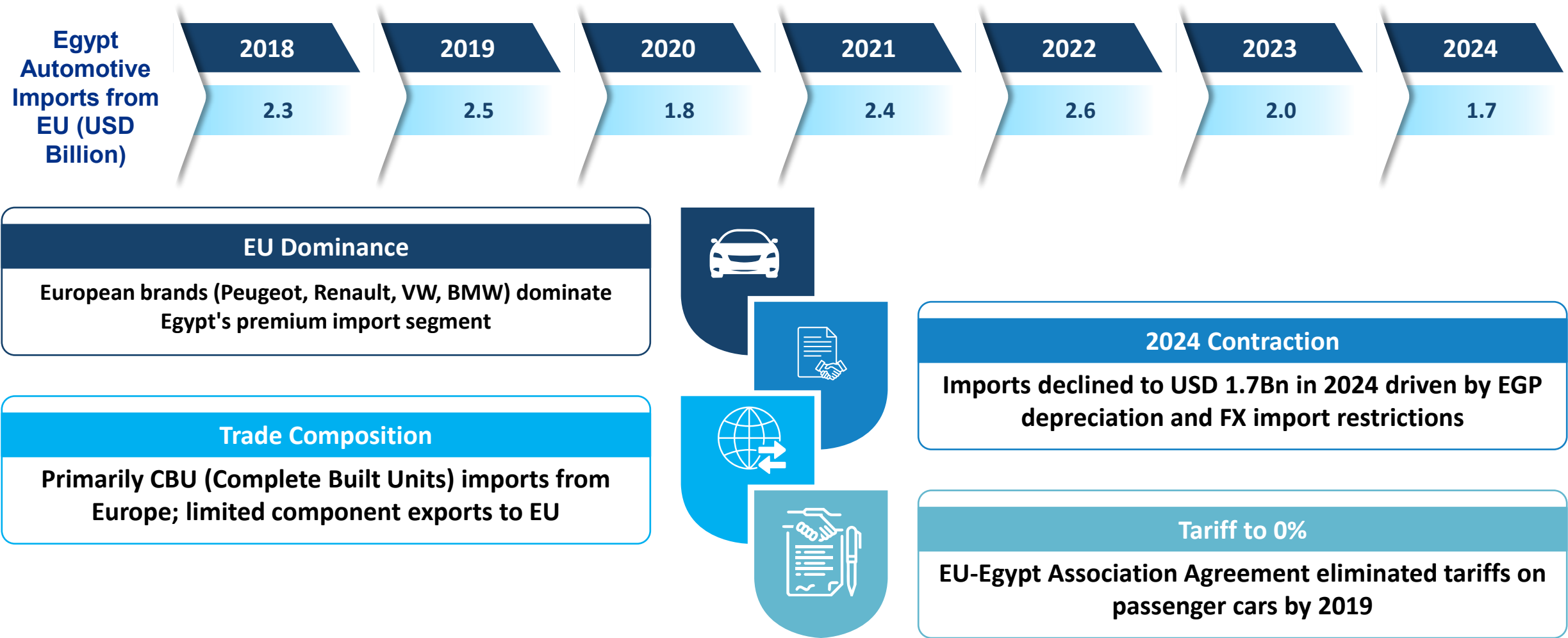
## Market Success Factors & Drivers



Source: 6Wresearch – Egypt Automotive Service Market (2025–2031); Industry expert interviews

# EU REMAINS EGYPT'S LARGEST AUTOMOTIVE TRADE PARTNER DRIVEN BY ASSOCIATION AGREEMENT PREFERENCES, HOWEVER OVERALL SHARE OF BUSINESS IS DECLINING

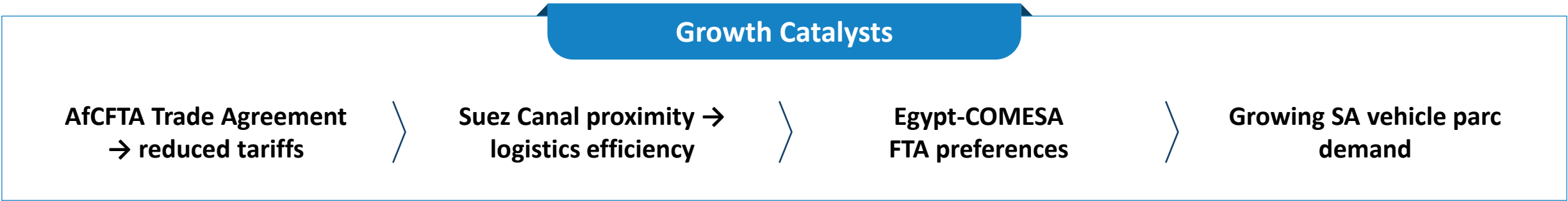
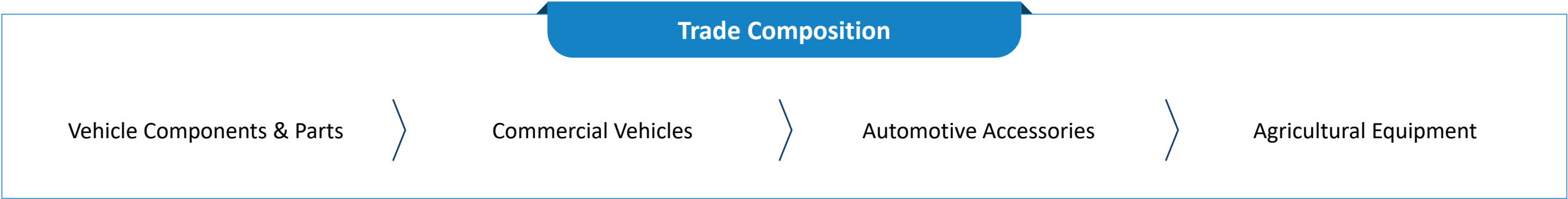
## Egypt–EU Trade Dynamics



Source: CAPMAS Trade Statistics; EU Trade Data; European Commission – EU-Egypt Association Agreement

# TRADE WITH SOUTHERN AFRICA REMAINS NASCENT BUT PRESENTS EMERGING COMMERCIAL OPPORTUNITIES

## Egypt–Southern Africa Trade



Source: UN Comtrade; ITC Trade Map; African Development Bank – Regional Trade Data (2023)



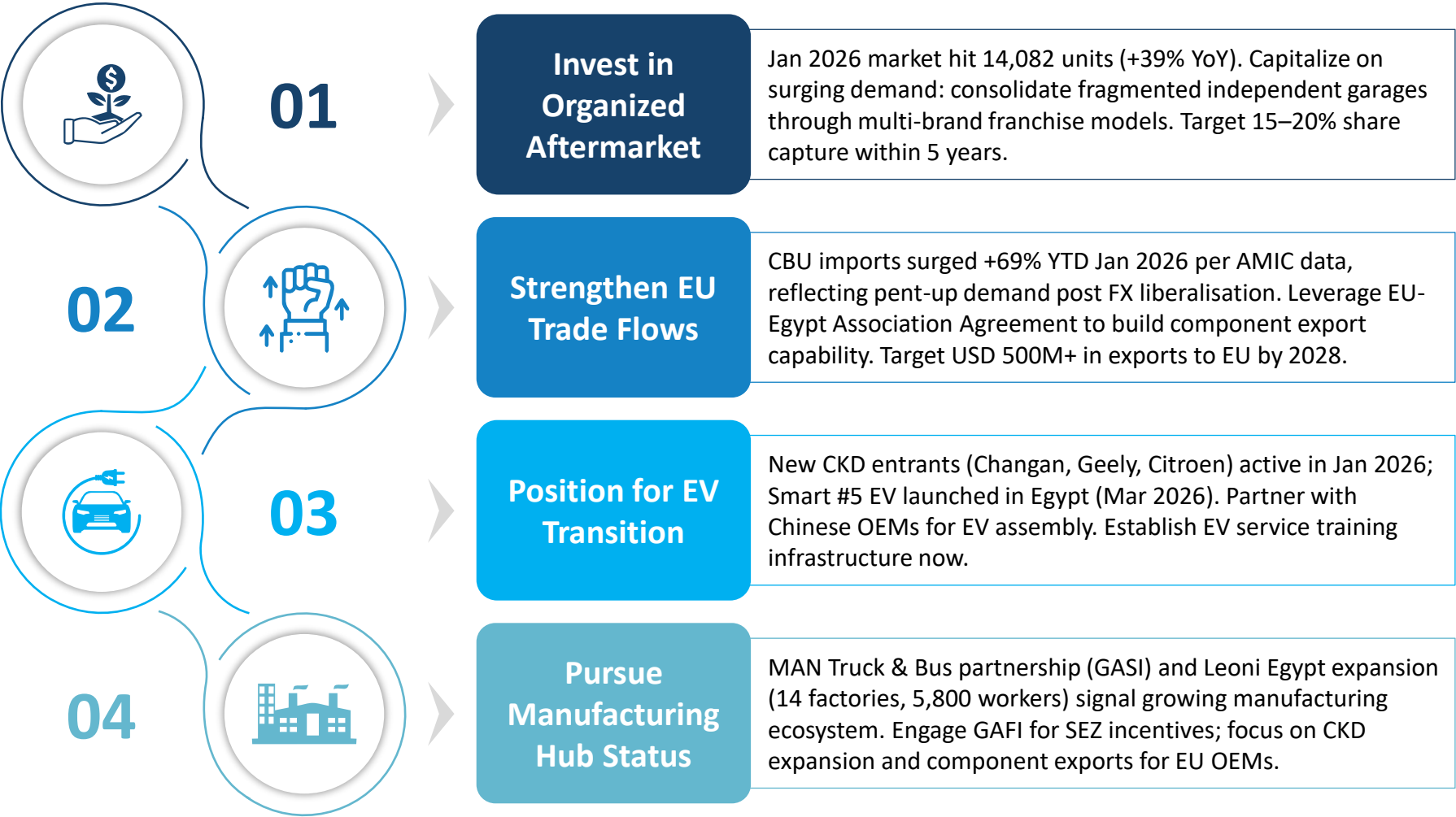
# GEOGRAPHIC ADVANTAGES & COST STRUCTURE POSITION EGYPT AS A CREDIBLE AUTOMOTIVE MANUFACTURING HUB




Source: Statista – Automotive Industry in Egypt; GAFI; CAPMAS; Frost & Sullivan Industry Analysis (2025)

# STRATEGIC OUTLOOK & RECOMMENDATIONS

## Egypt Automotive Sector | 2026–2030 Horizon



 **Market Forecast**

7.2%

Aftermarket CAGR  
2026–2030

~169K

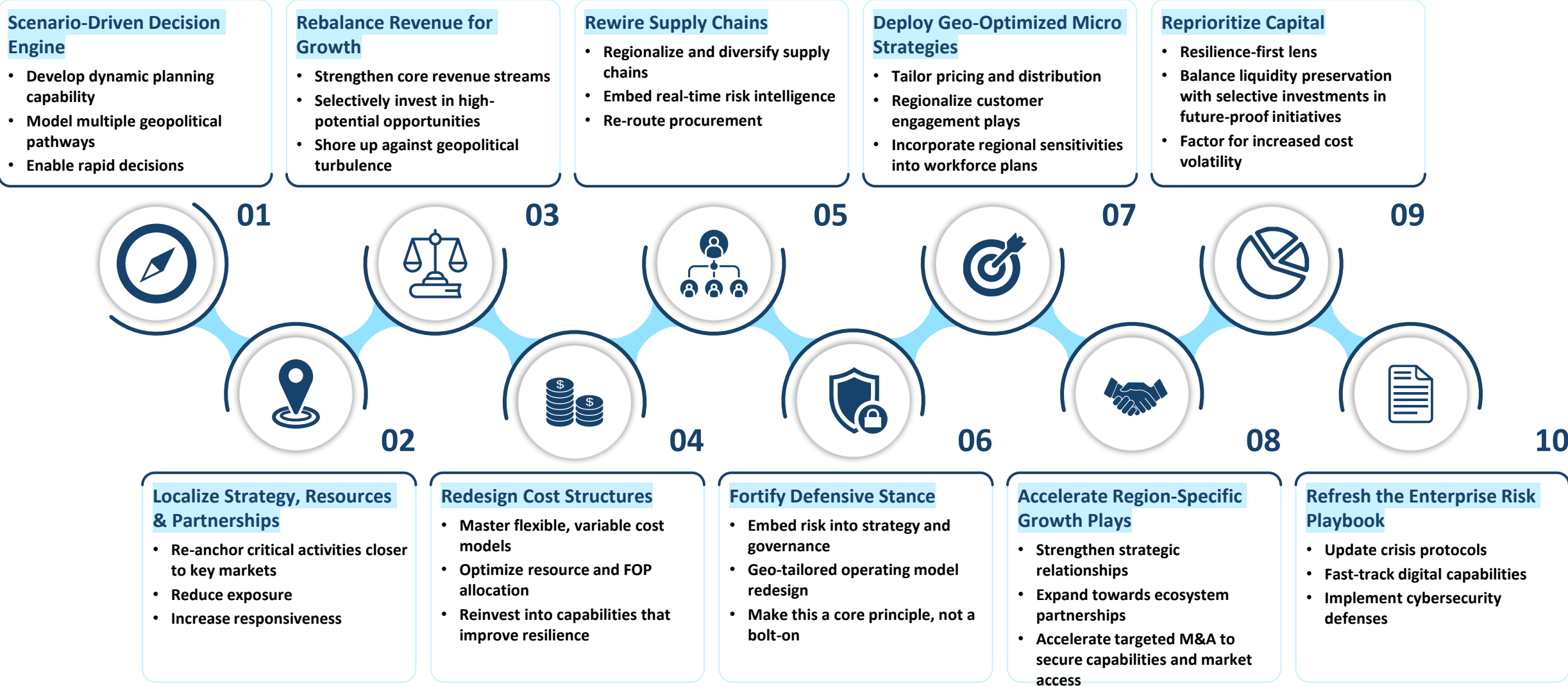
New Vehicle Sales  
2026 Run-Rate Est.

USD 8Bn

Aftermarket Market  
Size 2030E

# FROST & SULLIVAN'S 10-PRONGED RESILIENCE FRAMEWORK

## Your Transformational Growth Journey Starts Here

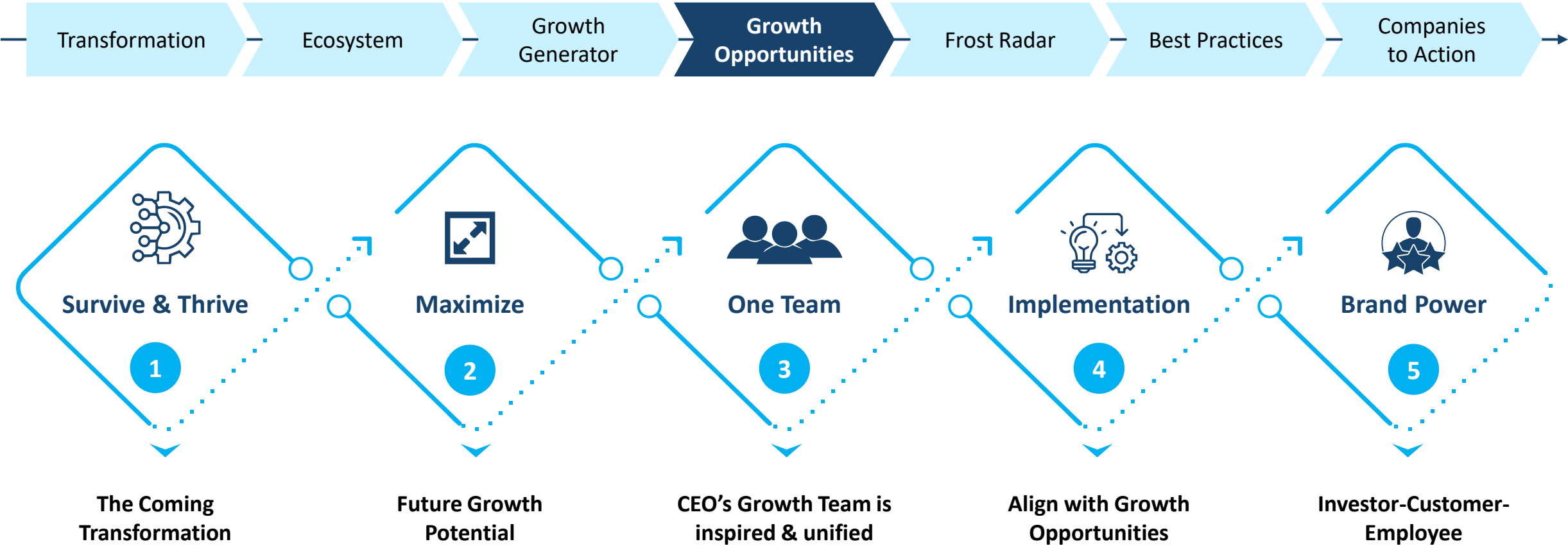




## Next Steps

How does your organization identify and prioritize Growth Opportunities?

# BENEFITS AND IMPACTS OF GROWTH OPPORTUNITIES



Which of these benefits would be most important to your Investor-Customer-Employee?

# NEXT STEPS

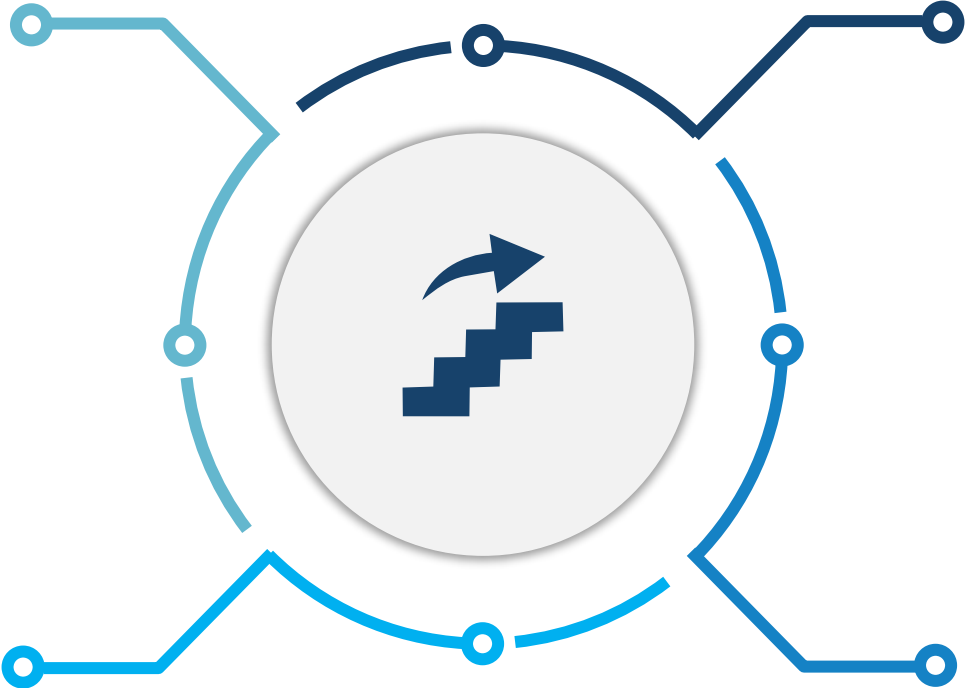


JOIN:

Growth Council

ENGAGE:

Growth Dialog



APPLY:

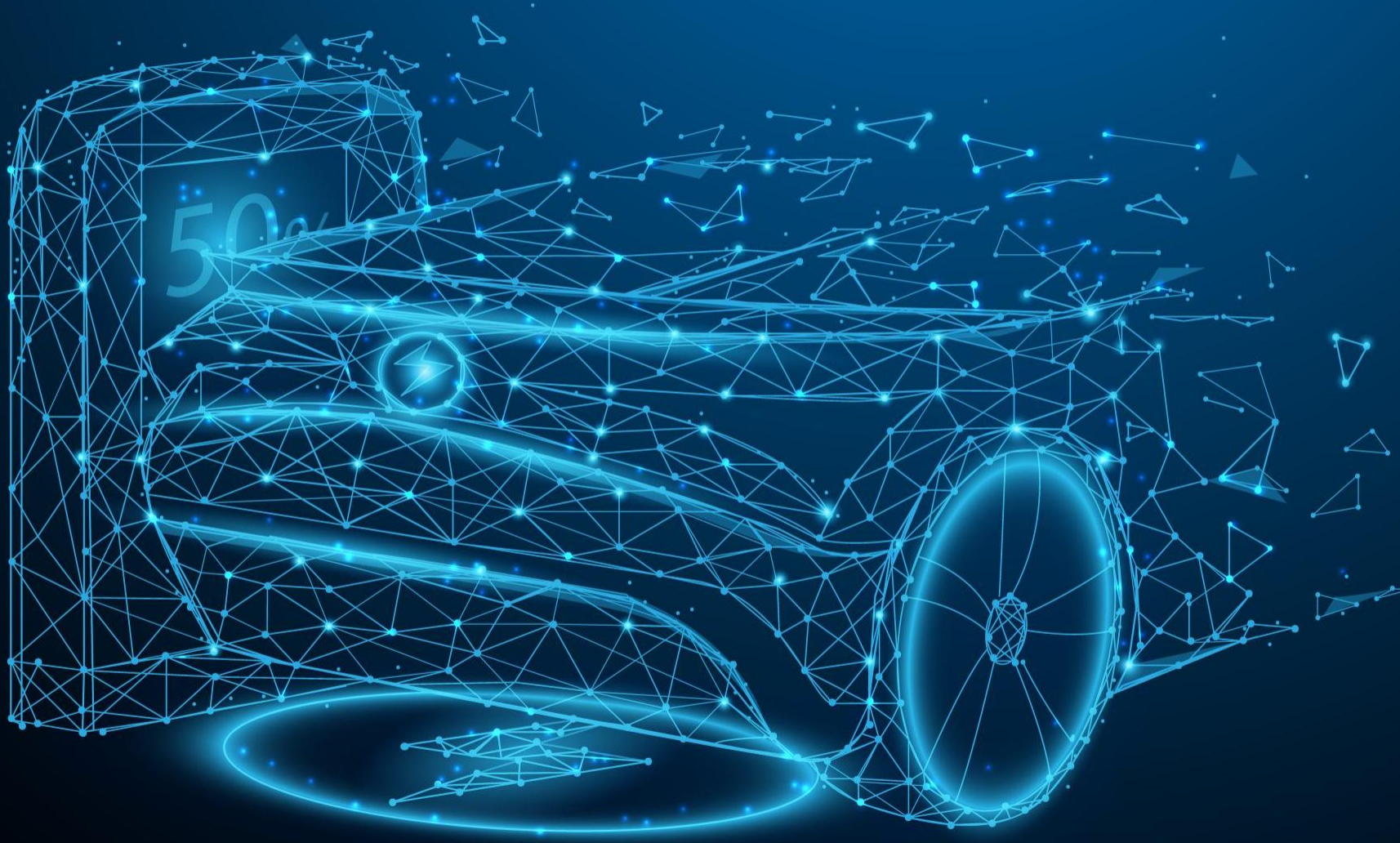
Companies to Action

PARTICIPATE:

Growth Council Think Tank

Does your current system support rapid adaptation to emerging opportunities?





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