



Automotive Aftermarket Newsletter

Q2 2026



Leading Global Middle-Market M&A Advisor

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Global Completed Advisor Ranking*

2006 – 2025	No. of Deals
1 KPMG	11,340
2 PricewaterhouseCoopers	11,234
3 Houlihan Lokey	8,071
4 Deloitte	7,293
5 UBS	7,117
6 Ernst & Young PLC	6,767
7 Rothschild & Co	6,620
8 JP Morgan	4,862
9 Goldman Sachs & Co	4,722
10 Lazard	4,618

Select KPMG Corporate Finance LLC Transactions

 has been acquired by a portfolio company of June 2026	 has been acquired by April 2026	 has been acquired by a portfolio company of March 2026	 a portfolio company of has acquired January 2026	 has been acquired by December 2025	 has been acquired by June 2025
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Industry Recognition

 Has awarded KPMG Corporate Finance LLC Consumer Deal of the Year Award (Mid-Market) 2025	 Has awarded KPMG Corporate Finance LLC USA Growth Investment Deal of the Year Award 2025
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Note: *Refinitiv; Full to Each Advisor- Any Involvement. Middle-market is defined as deals of enterprise value US\$500 million or less. As of February 19, 2026.

(1) Refers to the global Corporate Finance practices of KPMG International's network of independent member firms.

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Automotive Aftermarket Summary

Sector Commentary

- Despite ongoing global headwinds, the US light-duty automotive aftermarket is projected to grow 5.2% year-over-year in 2026 and surpass \$500 billion by 2029⁽¹⁾, supported by an older vehicle base, growing service intensity as vehicles become more technology-enabled, and continued consumer reliance on personal transportation which reflects steady aftermarket demand
- However, even as demand remains supported, motor oil pricing and availability could remain a near-term watchpoint for the US aftermarket, as the Middle East conflict has disrupted Group III base oil supply, a key input in modern synthetic lubricants. Aftermarket players, including quick-lube chains, dealerships, and independent repair shops, could face margin pressure, procurement and inventory planning challenges, and potential service delays for vehicles requiring these synthetic oils
- While the US-Iran interim framework agreement and possible reopening of the Strait of Hormuz could ease supply pressure, relief may not be immediate as existing constraints work through the market. If disruptions persist, aftermarket operators could face renewed pressure on synthetic oil availability and costs, with smaller shops more exposed if larger networks secure supply earlier
- At the same time, fuel-cost volatility could keep consumers focused on improving vehicle operating efficiency. For tire retailers and service providers, this may support demand for tire pressure checks, alignments, inspections, and replacement services, as properly maintained tires can reduce rolling resistance and help improve fuel economy
- On the trade front, the US capped Section 232 duties on certain Taiwan-origin automotive parts at 15% in May 2026 under the January 2026 US-Taiwan Memorandum of Understanding (MOU). The measure could improve pricing certainty for aftermarket players relying on Taiwan-sourced parts while potentially increasing price competition for US-based suppliers in affected categories
- Meanwhile, uncertainty around the outcome of United States-Mexico-Canada Agreement (USMCA) negotiations has added complexity to the trade environment. With Mexico accounting for 42% of US imported auto parts in 2025⁽²⁾, potential changes to qualifying auto parts' duty-free eligibility could increase sourcing complexity and landed costs, creating pricing pressure across the supply chain
- On the demand side, US new vehicle sales improved in May 2026, supported by higher OEM incentives, larger tax refunds, and a wealth-effect tailwind from equity market gains among higher-income buyers. However, elevated vehicle prices, high financing costs, and inflationary pressures continue to constrain price-sensitive consumers, who may delay new vehicle purchases or shift toward used vehicles
- Looking ahead, parts proliferation is expected to accelerate through 2030⁽³⁾, driven by growing vehicle complexity, hybrid adoption, and an aging vehicle parc that is increasing the need to stock and source parts for a wider range of older models. This could increase inventory, cataloging, and fulfillment complexity for traditional players, while eCommerce platforms gain an edge through broader catalog depth, centralized inventory access, and efficient fulfillment of harder-to-find parts
- Simultaneously, AI is gaining traction as an aftermarket productivity tool, helping technicians diagnose vehicle issues and predict future maintenance needs. Beyond repair work, it is also reshaping customer acquisition. As AI search tools provide direct answers to customers, shops may need clearer website content, FAQ-style information, and updated Google Business profiles to remain visible in AI-driven search results
- From an M&A perspective, private equity interest continues to support consolidation across the aftermarket, particularly in tire dealerships and auto repair platforms. Investors remain focused on scalable platforms with strong technician depth, recurring demand, and add-on acquisition potential across tire, mechanical, collision, and quick-lube services
- Meanwhile, independent tire dealers, particularly smaller owner-operated businesses, are increasingly viewing PE-backed transactions as an attractive exit option. This is supported by strong buyer demand, significant available capital, and sustained investor interest in the tire retail market

Deal Highlights



- Bauer Built has acquired Jack's Tire Sales and Service, a commercial and automotive tire retailer and provider of repair & preventative maintenance services



- Puget Collision has acquired six Fix Auto USA franchise locations across Southern California that offer collision and auto body repair services



- CenterOak Partners, has acquired Grismer Tire & Auto Service, an operator of tire and automotive service centers

Equity Market Overview

- In Q2 2026, the S&P 500 Index and the Dow Jones Industrial Average (DJIA) grew by 14.1% and 12.4%, respectively, while the Automotive Aftermarket Index⁽⁴⁾ posted a gain of 1.3%
- Within the sector, Parts Suppliers led segment-level performance, achieving growth of 23.5% in the second quarter of 2026
- However, the Retailers & Distributors segment witnessed comparatively softer performance, with the segment closing Q2 2026 down 1.5%
- Meanwhile, Enthusiast Products and Service Providers ended the second quarter on a positive note, recording gains of 11.0% and 3.9%, respectively

Note: (1) 2026 Joint Channel Market Size and Forecast by the Auto Care Association and MEMA Aftermarket Suppliers; (2) Prodensa - Mexican Automotive Industry Report, March 2026; (3) Recent Lang Aftermarket iReport; (4) The Automotive Aftermarket Index composition is provided on Page 5.

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AUTOMOTIVE AFTERMARKET NEWSLETTER – Q2 2026

Recent Notable Deals

RelaDyne Acquires Chart Distribution Group

Retailers & Distributors – June 25, 2026

RelaDyne, a supplier of lubricants, fuel, diesel exhaust fluid, chemicals, and related products, has acquired Chart Distribution Group, a distributor of lubricants, car care products, and ancillary automotive solutions. Founded in 1974, Chart Distribution Group serves automotive and commercial customers across the Midwest. The transaction expands RelaDyne's regional distribution footprint and strengthens its ability to serve customers through a broader product offering.

OpenRoad Collision Acquires Davis Paint & Collision

Service Providers – June 08, 2026

OpenRoad Collision, a collision repair company backed by Trivest Partners and LP First Capital, has acquired Davis Paint & Collision, a full-service collision repair business operating through three locations in Oklahoma. Founded in 1990, Davis Paint & Collision offers certified collision repair, auto body repair, and paintless dent repair services. The deal expands OpenRoad Collision's footprint in Oklahoma and increases its total network to 40 locations across the Southwest.

Bauer Built Acquires Jack's Tire Sales and Service

Retailers & Distributors – June 01, 2026

Bauer Built, a tire and automotive services company, has acquired Jack's Tire Sales and Service, a provider of tire sales, auto repair, and preventative maintenance services. Founded in 1982, Jack's Tire offers tire installation & rotation, wheel balancing, alignment checks, brake repair & replacement, and more. The acquisition further strengthens Bauer Built's service network across the Midwest and expands its capabilities in service support, emergency roadside assistance, and delivery efficiency.

El Car Wash Acquires Canton Car Wash

Service Providers – May 28, 2026

El Car Wash, an express car wash company backed by Warburg Pincus, has acquired Canton Car Wash, a full-service car wash chain in the Baltimore metropolitan area. Founded in 2007, Canton Car Wash offers single washes, monthly unlimited wash plans, and express car detailing services. The transaction gives El Car Wash immediate scale in Baltimore and supports its broader expansion across the Mid-Atlantic region.

ORAFOL Acquires Maxpro Manufacturing

Parts Suppliers – May 21, 2026

ORAFOL Europe, a global manufacturer of specialty self-adhesive graphic films and reflective materials, has acquired Maxpro Manufacturing, a producer of window films for automotive, residential, and commercial industries. Founded in 2010, Maxpro Manufacturing offers a wide range of ceramic, hybrid, dyed, and carbon window tints used for vehicle privacy, appearance, and protection. The deal expands ORAFOL's Functional Films business unit and strengthens its North American presence.

Puget Collision Acquires Six Fix Auto USA Franchise Locations

Service Providers – May 14, 2026

Puget Collision, a collision repair platform backed by Eagle Merchant Partners, has acquired six Fix Auto USA franchise locations across Southern California. The acquired centers offer a range of collision and auto body repair services, including dent repair, paint repair, and windshield repair. The acquisition expands Puget Collision's footprint to 72 locations across the U.S. and strengthens its presence in key Southern California collision repair markets.

Nickolas Asset Management Acquires Ranch Road Cargo

Enthusiast Products – May 04, 2026

Nickolas Asset Management, an operator-led family office, has acquired Ranch Road Cargo (RRC), a manufacturer of portable storage systems for pickup truck beds, SUVs, and UTVs. Headquartered in Texas, RRC offers durable and configurable cargo storage solutions. The transaction further positions RRC to expand into the broader mobile storage and vehicle organization market.

CenterOak Partners Acquires Grismer Tire & Auto Service

Service Providers – April 02, 2026

CenterOak Partners, a Texas-based private equity firm, has acquired Grismer Tire & Auto Service, an operator of tire and automotive service centers across the Dayton, Columbus, and Cincinnati metropolitan areas. Founded in 1932, Grismer offers mechanical & electrical repair, preventative maintenance, and tire replacement services for traditional, electric, and hybrid vehicles. The deal provides Grismer with a sector-focused partner to support its next phase of growth across existing and new markets.

Sources: Press Releases, Capital IQ, and other publicly available sources.

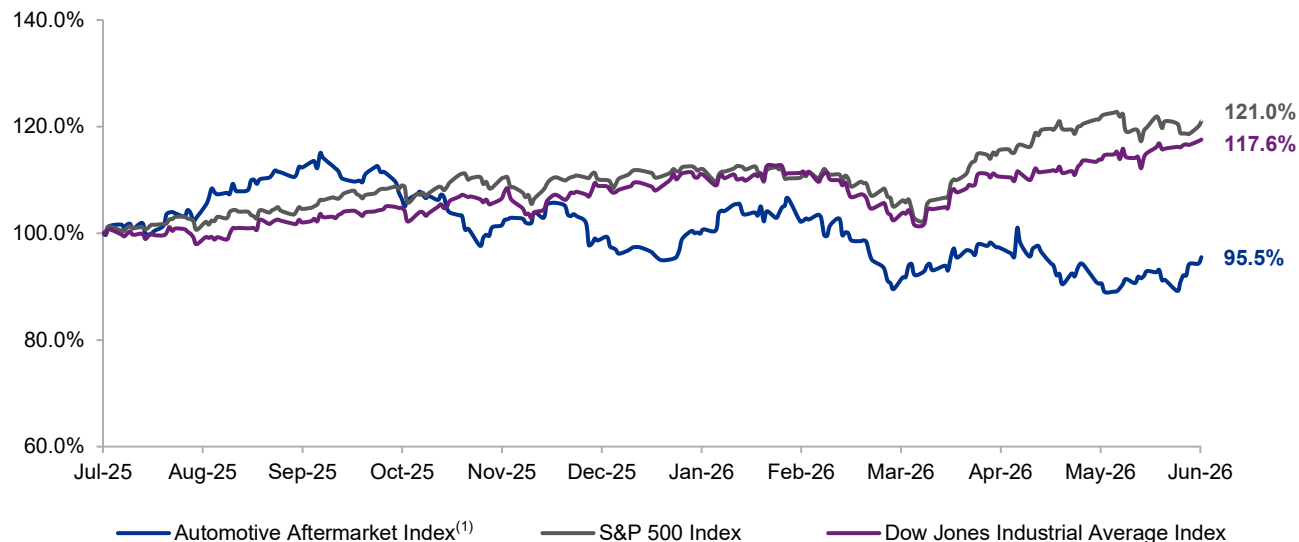
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AUTOMOTIVEAFTERMARKETNEWSLETTER – Q2 2026

Equity Market Benchmarking

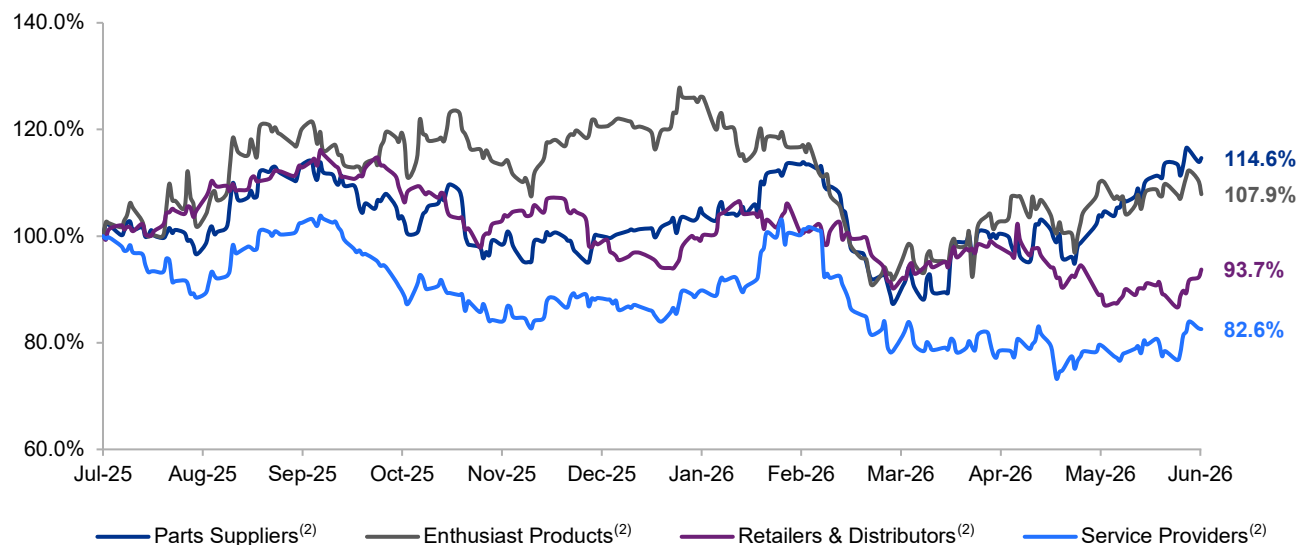
Automotive Aftermarket Index⁽¹⁾ vs. S&P 500 vs. Dow Jones Industrial Average

- The US automotive aftermarket was supported by resilient repair and maintenance demand in Q2 2026. However, soft consumer spending, along with supply chain uncertainty and margin pressure from geopolitical risks and an evolving tariff environment, continued to weigh on overall market sentiment
- In the second quarter of 2026, the S&P 500 Index and the Dow Jones Industrial Average (DJIA) grew by 14.1% and 12.4%, respectively, while the Automotive Aftermarket Index⁽¹⁾ posted a gain of 1.3%
- The muted performance of the Automotive Aftermarket Index⁽¹⁾ is primarily attributable to softness in Retailers & Distributors segment



Indexed Stock Performance – By Segment

- The Parts Suppliers segment demonstrated the strongest performance in Q2 2026, increasing 23.5% and outperforming all other sectors
- In contrast, the Retailers & Distributors segment trailed broader aftermarket segment performance in Q2 2026, ending the quarter with a 1.5% decline
- The Enthusiast Products segment recorded a 11.0% uptick in Q2 2026. However, the outlook remains cautious as consumers continue to show restraint toward discretionary purchases amid broader macroeconomic pressures
- After exhibiting early improvement at the start of 2026, the Service Providers segment lost momentum and remained muted for much of Q2 2026. However, the segment ended the quarter with a 3.9% uptick



Note: (1) The Automotive Aftermarket Index composition is provided on Page 5.

(2) Segment composition and information provided on Page 5.

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Selected Public Companies – Valuation Metrics

Company	HQ Country	Market Data				Valuation Multiples - Enterprise Value To:		
		Market Cap (\$mm)	Enterprise Value (\$mm) ⁽¹⁾	Share Price ⁽²⁾	% 52 Wk High	LTM EBITDA ⁽³⁾	CY 2026 EBITDA	CY 2027 EBITDA
Parts Suppliers								
Axalta Coating Systems Ltd.	US	\$7,324	\$9,908	\$34.22	95.8%	9.5x	8.7x	8.2x
Gates Industrial Corporation plc	US	7,101	9,041	27.97	95.9%	11.7x	11.2x	10.2x
Dorman Products, Inc.	US	4,078	4,583	136.45	81.8%	10.7x	11.4x	10.3x
Standard Motor Products, Inc.	US	868	1,594	38.97	84.7%	5.9x	7.4x	7.0x
Motorcar Parts of America, Inc.	US	290	477	15.32	84.5%	5.6x	4.8x	4.5x
Mean					88.5%	8.7x	8.7x	8.0x
Median					84.7%	9.5x	8.7x	8.2x
Enthusiast Products								
Polaris Inc.	US	\$3,893	\$5,822	\$68.44	91.0%	13.1x	11.0x	9.2x
XPEL, Inc.	US	1,367	1,348	49.60	88.7%	14.8x	15.6x	11.6x
ARB Corporation Limited	AU	1,095	1,083	13.09	45.8%	10.9x	10.0x	9.3x
Fox Factory Holding Corp.	US	711	1,444	16.95	54.3%	8.2x	8.1x	7.3x
Holley Inc.	US	307	858	2.55	56.9%	7.4x	6.5x	6.1x
Mean					67.3%	10.9x	10.2x	8.7x
Median					56.9%	10.9x	10.0x	9.2x
Retailers & Distributors ⁽⁴⁾								
O'Reilly Automotive, Inc.	US	\$76,316	\$84,730	\$92.09	84.7%	20.7x	19.7x	18.6x
AutoZone, Inc.	US	52,175	64,867	3,195.94	72.8%	15.2x	12.8x	13.0x
Genuine Parts Company	US	16,237	22,468	117.98	77.8%	11.0x	10.6x	9.8x
LKQ Corporation	US	6,709	11,634	26.33	66.2%	8.2x	7.8x	7.2x
Advance Auto Parts, Inc.	US	3,754	6,448	62.22	88.9%	11.3x	10.3x	9.0x
CarParts.com, Inc.	US	49	64	6.44	47.4%	NM	NM	11.9x
Mean					73.0%	13.3x	12.2x	11.6x
Median					75.3%	11.3x	10.6x	10.8x
Service Providers								
Valvoline Inc.	US	\$5,043	\$6,987	\$39.54	95.7%	14.0x	12.2x	10.7x
Boyd Group Services Inc.	CA	2,632	4,602	94.56	54.1%	11.1x	8.3x	7.3x
Driven Brands Holdings Inc.	US	2,299	4,369	13.94	70.6%	10.0x	9.9x	8.8x
Monro, Inc.	US	514	985	17.11	71.6%	7.0x	11.5x	10.1x
Mean					73.0%	10.5x	10.5x	9.3x
Median					71.1%	10.5x	10.7x	9.5x

Sources: CapitalIQ and Company filings.

All figures in USD, where applicable, converted at rates as of June 30, 2026.

(1) Enterprise Value (EV) equals Market Capitalization plus Debt, Preferred Equity, and Minority Interest, minus Cash and Cash Equivalents as of closing price June 30, 2026.

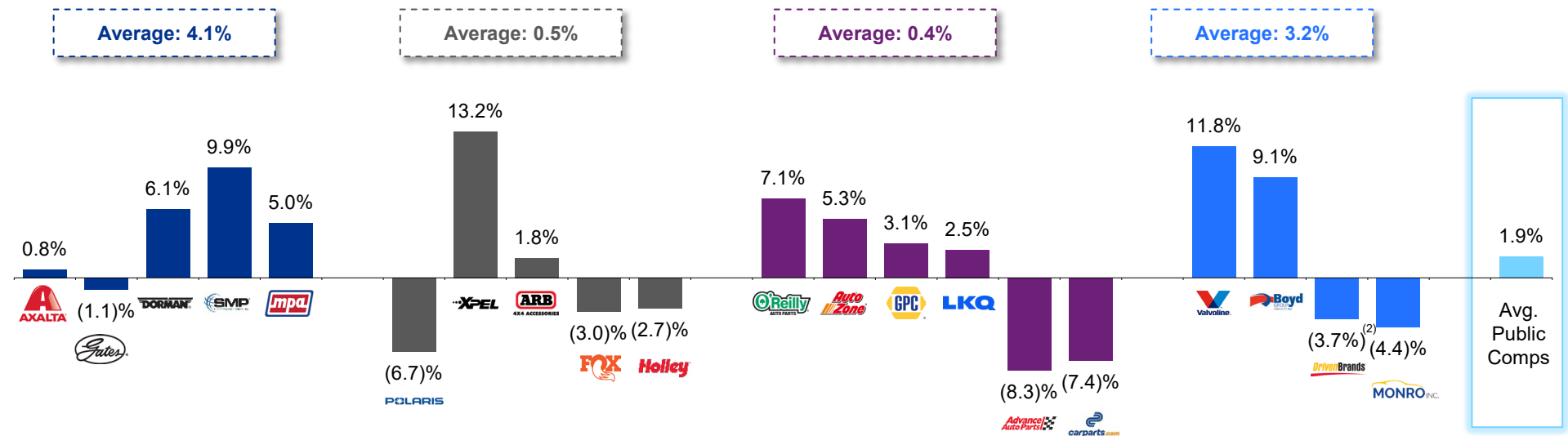
(2) Closing share prices as of June 30, 2026.

(3) EBITDA equals Earnings before Interest Expense, Income Taxes, Depreciation, and Amortization.

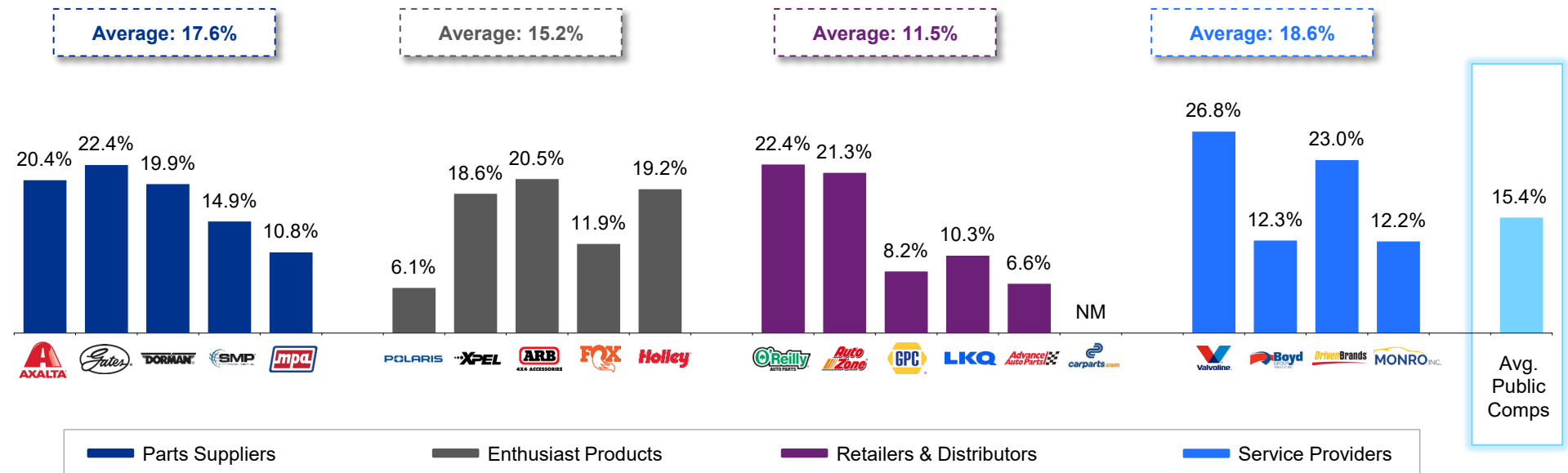
(4) Operating Lease adjustment has been excluded to convert reported EBITDAR to EBITDA - except for CarParts.com, Inc.

Selected Public Companies – Operational Benchmarking

Historical Revenue Growth – 3 Year CAGR⁽¹⁾



LTM EBITDA Margin⁽¹⁾



Sources: CapitalIQ and company filings.

All figures in USD, where applicable, converted at rates as of June 30, 2026.

(1) Based on LTM financials. LTM figures are as per latest published company filings.

(2) Reflects Driver Brands' latest restated financials.

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Selected Transaction History (With Multiples)

Closed Date	Industry Classification	Target Company	Buyer	Target Description	Enterprise Value (\$mm)	EV / LTM EBITDA
Pending	Parts Suppliers	Axalta Coating Systems Ltd. (NYSE:AXTA)	Akzo Nobel N.V. (ENXTAM:AKZA)	Produces and distributes high performance coatings for the automotive aftermarket refinish and industrial markets.	\$12,076.4	11.4x
Jan-26	Service Providers	Joe Hudson's Collision Center	Boyd Group Services Inc. (TSX:BYD)	Offers automotive collision repair services across the southern US.	\$1,300.0	12.5x
Dec-25	Service Providers	Breeze Autocare	Valvoline Inc. (NYSE:VVV)	Provider of automotive quick lube, car wash, and light repair services.	\$625.0	10.7x
Oct-25	Retailers & Distributors	Pick Your Part Business of LKQ Corp. (NasdaqGS:LKQ)	Pacific Avenue Capital Partners	Operates as a self-service salvage yard that offers used auto parts.	\$410.0	7.7x
May-25	Parts Suppliers	Dunlop Brand	Sumitomo Rubber Industries, Ltd. (TSE:5110)	Operates as a tire brand. The transaction also encompasses brand trademarks and key intangible assets supporting operations in Europe, North America, and Oceania.	\$735.0	7.9x
Apr-25	Retailers & Distributors	Wheeler Fleet Solutions	One Equity Partners	Distributor of fleet maintenance parts, specializing in medium- and heavy-duty trucks.	\$230.0	7.4x
Jan-25	Parts Suppliers	AXN Heavy Duty LLC	Randon Auto Parts North America LLC (Randoncorp)	Manufacturer and distributor of axles and suspension systems for semi-trailers in the US.	\$49.3	4.0x
Nov-24	Retailers & Distributors	Worldpac Inc.	The Carlyle Group Inc. (NasdaqGS:CG)	Importer and distributor of original equipment (OE) quality replacement automotive parts to independent service professionals.	\$1,500.0	15.0x
Feb-24	Parts Suppliers	The Carlstar Group LLC	Titan International Inc. (NYSE:TWI)	Manufacturer and distributor of specialty tires and wheels for outdoor power equipment, powersports, and trailers.	\$296.2	4.1x
Jan-24	Parts Suppliers	Sportech Inc.	Patrick Industries Inc. (NasdaqGS:PATK)	Manufactures and assembles cab components and systems for powersports, golf and turf, industrial, and agricultural end markets.	\$315.0	7.7x
May-23	Service Providers	TravelCenters of America Inc.	BP Products North America Inc.	Operator of full-service travel centers that offer truck repair & maintenance services, diesel exhaust fluids, and other customer amenities.	\$3,500.0	5.8x
Mar-23	Parts Suppliers	Global Products Business of Valvoline Inc.	Aramco Overseas Company B.V.	Manufacturer of automobile lubricant in the US.	\$2,650.0	8.3x
Feb-23	Service Providers	True Blue Car Wash LLC	Alimentation Couche-Tard Inc. (TSX:ATD)	Provider of express car washing services.	\$395.9	11.3x
Feb-23	Parts Suppliers	Paragon Tank Truck Equipment LLC	Ingersoll Rand Inc. (NYSE:IR)	Offers liquid and dry bulk products & system solutions for trucks.	\$40.0	10.0x
Nov-22	Parts Suppliers	Tenneco Inc.	Apollo Global Management Inc. (NYSE:APO)	Manufacturer and marketer of automotive products for OEM and aftermarket customers.	\$7,100.0	5.4x
Nov-22	Parts Suppliers	Hercules Enterprises LLC	Randon S.A. Implementos e Participações (BOVESPA:RAPT4)	Manufactures custom chassis, with a focus on intermodal container chassis and specialty trailers.	\$39.6	6.5x
Mean					\$1,954	8.5x
Median					\$518	7.8x

Sources: Capital IQ and other publicly available sources.

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Pending	Retailers & Distributors	National Coatings & Supplies Inc.	Wesco Group	A distributor of paint and coatings serving aftermarket automotive refinish and industrial customers.
Pending	Retailers & Distributors	Community Wholesale Tire's Distribution Assets	U.S. AutoForce Inc.	Operates as a tire distributor based in the Midwest.
Jul-26	Service Providers	Jiffy Lube International	Monomoy Capital Partners	A quick lube and automotive service franchisor in North America.
Jun-26	Service Providers	The Garage Automotive Solutions	EAS Tire & Auto LLC	Offers automotive services, including diagnostics, alternator repair, oil changes, and glass repair.
Jun-26	Retailers & Distributors	Chart Distribution Group	RelaDyne	A distributor of lubricants, detailing products, and ancillary automotive solutions.
Jun-26	Retailers & Distributors	Tire World	Left Lane Auto	A tire dealer and auto repair service provider specializing in brake repair, preventative maintenance, wheel alignment, and related services.
Jun-26	Retailers & Distributors	Decatur Tires	Left Lane Auto	Operates as a tire dealership in Decatur, TX.
Jun-26	Service Providers	Pampered Auto Care Inc.	GreatWater 360 Auto Care	Provides auto repair and maintenance services for vehicle brands, including BMW, Mercedes-Benz, Audi, Porsche, and Volvo.
Jun-26	Service Providers	Highland Auto in Tennessee / Highland Tire at Sentry Station in Georgia	Sun Auto Tire & Service	Offers a comprehensive range of automotive care services, including brake repair, oil changes, diagnostics, and preventative maintenance.
Jun-26	Service Providers	Davis Paint & Collision	OpenRoad Collision	A full-service collision repair business operating through three locations in Oklahoma.
Jun-26	Service Providers	Don's Service Center LLC	Left Lane Auto	Operates a full-service automotive repair and tire service center in Terre Haute, IN.
Jun-26	Service Providers	Elephant Car Wash site in Bellevue	Brown Bear Car Wash	A car wash location in Bellevue, WA.
Jun-26	Retailers & Distributors	Jack's Tire Sales and Service	Bauer Built	Offers tire sales, auto repair, and preventative maintenance services.
May-26	Parts Suppliers	Maxpro Manufacturing	ORAFOL Europe	A manufacturer of window and protective films for automotive, residential, and commercial industries.
May-26	Service Providers	Canton Car Wash	EI Car Wash	A full-service car wash chain in the Baltimore metropolitan area.
May-26	Service Providers	White Glove Of Delaware Inc.	Splash Car Wash Inc.	A full-service car wash and auto detailing provider operating six locations across Delaware, Pennsylvania, and New Jersey.

Sources: *Capital IQ and other publicly available sources.*

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May-26	Service Providers	Main Street Tire & Auto	Sun Auto Tire & Service	Operates a full-service auto repair facility in Virden, IL.
May-26	Service Providers	Service Garage Inc.	Victory Tire & Auto Service Inc.	A full-service auto repair and maintenance provider in Blaine, MN.
May-26	Service Providers	Champs Tire & Service	Left Lane Auto	Operates an auto repair and tire service business with two locations in Decatur, GA.
May-26	Service Providers	Crosstown Auto Repair	GreatWater 360 Auto Care	A full-service auto maintenance and tire shop in Burnsville, MN.
May-26	Parts Suppliers	Enforcement One Inc.	Lehr Upfitters LLC	A provider of emergency vehicle upfitting services, as well as equipment solutions for law enforcement, emergency response, and government agencies across Florida's tri-county region.
May-26	Service Providers	Six Fix Auto USA Franchise Locations	Puget Collision	Operates six collision repair and auto body centers across Southern California.
May-26	Service Providers	Quality Tire & Auto	Sun Auto Tire & Service	Offers auto repair and maintenance services, including oil changes, brake services, and diagnostics, in Murfreesboro, TN.
May-26	Service Providers	Holly Tire & Auto Service	GreatWater 360 Auto Care	Provides auto maintenance and repair services, including wheel alignment, engine repair, and oil changes.
May-26	Service Providers	Four Purple Elephant Car Wash Locations	Summit Wash Holdings	Operates four car wash locations across Waterbury, Middletown, Torrington, and Naugatuck.
May-26	Enthusiast Products	Ranch Road Cargo	Nickolas Asset Management	A manufacturer of portable storage systems for pickup truck beds, SUVs, and UTVs.
May-26	Service Providers	Service Street Tire & Auto Repair	Sun Auto Tire & Service	An automotive maintenance and repair shop located in Cypress, TX.
May-26	Service Providers	Andy's Tire & Auto Service	GreatWater 360 Auto Care	Provides comprehensive auto repair services, including oil changes, brake repair, vehicle inspections, and tire replacement & rotation.
Apr-26	Retailers & Distributors	Carquest of Decorah	Arnold Motor Supply	Operates an auto parts store in Decorah, IA.
Apr-26	Service Providers	CS Automotive's two stores in Tennessee	Left Lane Auto	Provides full-service auto repair and maintenance across two locations in Tennessee.
Apr-26	Service Providers	Two Checkpoint Tire & Service locations in Illinois	Sun Auto Tire & Service	Offers tire and automotive services, including tire sales, brake services, oil changes, and routine maintenance.
Apr-26	Service Providers	Source 1 Automotive	GreatWater 360 Auto Care	An auto repair and service facility in Maineville, OH.

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Apr-26	Service Providers	Carmerica	Sun Auto Tire & Service	Offers automotive care services, including tire replacement, alignments, brake services, oil changes, and preventative maintenance.
Apr-26	Service Providers	Cooper Tire & Auto	GreatWater 360 Auto Care	A full-service auto repair and maintenance facility in Muncie, IN.
Apr-26	Service Providers	Grismer Tire & Auto Service	CenterOak Partners	An operator of tire and automotive service centers across the Dayton, Columbus, and Cincinnati metropolitan areas.
Mar-26	Service Providers	Cherry Collision	VIVE Collision	Provides auto collision repair services across Southern New Jersey.
Mar-26	Service Providers	Five automotive service shops in North Las Vegas	Sun Auto Tire & Service	Offers automotive maintenance and repair services, including oil changes, brake repair, and battery replacement.
Mar-26	Service Providers	Marina Auto Body	Chilton Auto Body	Provides automotive collision repair and paintless dent removal services.
Mar-26	Service Providers	23 Colorado and Arizona locations from DAS Drive Automotive Services	Sun Auto Tire & Service	Operates 23 automotive repair and tire locations across Colorado and Arizona.
Mar-26	Retailers & Distributors	Lucas Classic Tires	Performance Plus Tire and Auto Company	A tire distributor for collector, vintage, and hot rod vehicles.
Mar-26	Service Providers	Luv-A-Wash	El Car Wash	Operates as a car wash company specializing in express exterior washes in Pine Ridge.
Mar-26	Parts Suppliers	Bruno Wessel Inc.	Martins Industries Inc.	A manufacturer and distributor of tire studs, studding equipment, and the Equalizer multi-tire inflation system.
Mar-26	Parts Suppliers	Camshaft Machine Company	TransGo	A manufacturer of internal combustion engine and fuel system camshafts for the automotive aftermarket.
Mar-26	Retailers & Distributors	Schierl Tire & Auto Service / Al Huss Auto	Dobbs Tire & Auto Centers Inc.	Operates tire and automotive repair service locations across Wisconsin.
Mar-26	Retailers & Distributors	Al's Tire & Auto	Steve Shannon Tire Co.	A tire dealer in North Cambria and Ebensburg, PA.
Mar-26	Service Providers	Wett Car Wash LLC	Club Car Wash	Provides automated car wash services in West Chicago, IL.
Mar-26	Service Providers	Leighton's Garage	GreatWater 360 Auto Care	A full-service automotive repair shop providing brake repair, tire sales, and maintenance services.
Mar-26	Retailers & Distributors	Automotive Systems Warehouse	National Oak Distributors	Operates as a warehouse distributor of automotive paint, body shop supplies, and tools.

Sources: *Capital IQ and other publicly available sources.*

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Feb-26	Service Providers	Miracle Car Wash LLC	EI Car Wash	Offers car wash and detailing services in Boca Raton, FL.
Feb-26	Service Providers	Seven Jiffy Lube locations in Metro Little Rock, AR	Auto Center Enterprises	Provides a range of automotive preventative maintenance services, including oil changes, brake repair, and transmission services.
Feb-26	Service Providers	Customer 1 Tire and Auto Care	All County Tire & Auto	Operates as an auto repair and tire shop in Boynton Beach, FL.
Feb-26	Enthusiast Products	Heidts Automotive	BMR Suspension	A manufacturer of high-performance suspension and related chassis components for customized classic vehicles and muscle cars.
Feb-26	Service Providers	Total Automotive LLC	EAS Tire & Auto LLC	Provides auto repair services based in Fort Collins, CO.
Feb-26	Service Providers	Bay City Tire & Wheel	Sun Auto Tire & Service	Specializes in automotive services, including tire repair, engine diagnostics, brake repair, and oil changes, in Mobile, AL.
Feb-26	Service Providers	Three Locations of Black's Tire & Auto Save	Sun Auto Tire & Service	Provides tire and automotive repair services throughout northeastern and central Alabama.
Feb-26	Service Providers	Don Foshay's Discount Tire & Alignment	Left Lane Auto	Offers automotive repair and maintenance services, including oil changes, brake repair, and tire installation.
Feb-26	Enthusiast Products	TRUKD LLC	Manufacturing Corporation of America Inc.	A manufacturer of modular rack systems and accessory panels for vehicles, including the Toyota Tacoma, Ford Ranger, and Jeep Gladiator.
Feb-26	Retailers & Distributors	Heartland Tire Inc.'s retail stores in Minnesota	Telle Tire & Auto Service	Operates 11 retail tire and automotive service locations across Minnesota.
Feb-26	Service Providers	Bodymotion Inc.	Mountain View Auto Body	Offers collision repair and mechanical services for the Porsche and high performance automotive vehicles.
Feb-26	Service Providers	Liberty Tire and Auto Inc.	Sun Auto Tire & Service	Offers auto repair, tire sales, and scheduled maintenance services in Liberty, NC.
Feb-26	Retailers & Distributors	Zurcher Tire Inc.	K&M Tire	A wholesale tire distributor based in Monroe, IN.
Jan-26	Service Providers	Lyons Service Corp Inc.	VIP Inc.	Provides automotive repair and maintenance services, including battery replacement and wheel alignment.
Jan-26	Service Providers	Bramble Body Shop Inc.	Hertrich Collision Centers	An auto body repair shop based in Easton, MD.
Jan-26	Service Providers	Silverlake Automotive	Straightaway Tire & Auto	Offers automotive repair services, including wheel alignment, suspension checks, and brake repair.

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Jan-26	Service Providers	Macs Tire Center Inc.	Sun Auto Tire & Service	Operates as an automotive service business based in Tupelo, MS.
Jan-26	Retailers & Distributors	Color Systems	PSE Group	A distributor of automotive paint and ancillary products serving customers across New England.
Jan-26	Service Providers	Vital Truck & Van LLC	Alliance Fleet LLC	Specializes in upfitting Class 1–3 light commercial vehicle fleets in Illinois and Colorado.
Jan-26	Service Providers	Valor Fleet Services	Tailwind Management LP	Offers towing, recovery, and roadside services to municipal, state, and federal agencies, commercial enterprises, and individual customers.
Jan-26	Service Providers	Fantastic Finishes / Chassis Master	Collision Partners LLC	Provides auto body and collision repair services in Florida.
Jan-26	Service Providers	Top Cat Car Wash LLC	Limon LLC	Offers automatic and self-service car wash services in Ossipee, NH.
Jan-26	Retailers & Distributors	Justice Tire Distributors	BTS Tire & Wheel Distributors	An automotive tire distributor serving individual and business customers.
Jan-26	Retailers & Distributors	Jim Whaley Tires / Lens Automotive	Telle Tire & Auto Service	Offers tire sales and automotive repair services, including oil changes, tire installation, and vehicle inspections.
Jan-26	Retailers & Distributors	Smyth Automotive Inc.	Fisher Auto Parts Inc.	An auto aftermarket and original equipment parts retailer based in Cincinnati, OH.
Jan-26	Retailers & Distributors	Matthews Tire Inc.	Dobbs Tire & Auto Centers Inc.	A tire dealer and automotive repair services provider based in Appleton, WI.
Jan-26	Service Providers	Bruce's Body Shop	Brightpoint Auto Body Repair	Offers auto body and collision repair services in Paris, TN.
Dec-25	Service Providers	Miller Automotive / Day Heights Auto Service	GreatWater 360 Auto Care	Provides general automotive repair and maintenance services.
Dec-25	Service Providers	Northwood Garage LLC	Auto Care Plus LLC	An automotive repair shop in Northwood, NH.
Dec-25	Service Providers	Twin River Tire & Auto Inc.	Victory Tire & Auto Service Inc.	Operates three auto repair locations in Minnesota under the Granite City Tire & Auto and Plaza Tire & Auto brands.
Dec-25	Service Providers	Arvada Square Auto	Relay Hill Capital LLC	A full service auto repair shop offering wheel alignment, oil changes, and other maintenance services.
Dec-25	Enthusiast Products	Egis Group LLC / Quality Engineered Services	Patrick Industries Inc. (NasdaqGS:PATK)	Produces electrical components and wire harnesses for specialty vehicle and marine applications.

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Dec-25	Service Providers	Max Auto Supply Company LLC	Midas International LLC	An automotive service provider operating Midas branded locations across Ohio, New York, Pennsylvania, Michigan, Kentucky, and Georgia.
Dec-25	Service Providers	5th Gear Automotive Inc.	EAS Tire & Auto LLC	Provides full service vehicle repair and maintenance in Colorado.
Dec-25	Service Providers	Left Lane Auto	Bertram Capital Management	An automotive repair company offering tire sales, installation, and general maintenance services.
Dec-25	Service Providers	Kendrick Paint & Body	Classic Collision LLC	Operates nine OEM certified auto body repair facilities across Augusta, GA, and Aiken, SC.
Dec-25	Enthusiast Products	Brian Tooley Racing LLC	Burnout Brands	A manufacturer and online retailer of high performance automotive parts, including camshafts, valvetrain components, and cylinder heads.
Dec-25	Service Providers	David's AutoSpa LLC / Clean Machine / Aqua Express Car Wash	Flagstop Car Wash	Operates car wash companies in Virginia, with locations in Greater Richmond, Charlottesville, and Zion Crossroads.
Dec-25	Service Providers	Cruisers Car Wash	LUV Car Wash	Offers car wash services in Northridge, CA.
Dec-25	Service Providers	J.C. Automotive Service Inc.	All County Tire & Auto	An auto repair shop that provides engine diagnostics and preventative maintenance services.
Dec-25	Service Providers	Babcock Auto Care LLC	Victory Tire & Auto Service Inc.	A Minnesota-based automotive repair company offering brake repair, oil changes, inspections, and other maintenance services.
Nov-25	Service Providers	Bluewave Express LLC	Texas Express Wash LLC	Operates 53 express car wash locations in Texas and California.
Nov-25	Service Providers	Car-Tech Complete Auto Repair & Tire	GreatWater 360 Auto Care	Offers auto repair services, including wheel alignment, brake repair, and engine maintenance.
Nov-25	Service Providers	Time To Shine Car Wash Inc.	WhiteWater Express Car Wash	Provides car wash services in South Carolina.
Nov-25	Service Providers	Systems For Public Safety Inc.	Lehr Upfitters LLC	Specializes in customization, upfitting, and maintenance of police and fire vehicles.
Nov-25	Service Providers	Pete's Express Car Wash LP	Spotless Brands	A car wash company operating six locations across the Greater Philadelphia area.
Nov-25	Service Providers	Complete Auto Body Centers LLC	Brightpoint Auto Body Repair	Provides automotive collision repair and maintenance services in Missouri.
Nov-25	Enthusiast Products	Overland Ruff Rax Inc.	Overland Vehicle Systems LLC	Manufactures roof racks and bed racks for adventure vehicles.

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Nov-25	Retailers & Distributors	GM Auto Paint	Wesco Group	A distributor of automotive refinish and industrial coating solutions, operating through 10 locations across California and Las Vegas.
Nov-25	Service Providers	Repair Division of Complete Auto Body & Repair	GreatWater 360 Auto Care	A three location vehicle repair business serving customers across the St. Louis region.
Nov-25	Retailers & Distributors	Smetzer Paint & Supply LLC	Automotive Color & Supply Corp.	An Ohio based distributor of automotive and industrial paint and related supplies.
Nov-25	Service Providers	1st Class Auto	Quality Collision Group	Offers certified luxury vehicle repair services in Pompano Beach, FL.
Nov-25	Parts Suppliers	Suspensia / Tuff Support	Advanced Innovative Technology	Produces aftermarket and OEM components, including steering rods, ball joints, gas springs, and lift supports.
Nov-25	Parts Suppliers	Alto Products Corp.	Freudenberg-NOK General Partnership	Manufactures clutch plates and powertrain components for automotive, high performance, heavy duty, industrial, marine, and motorcycle markets.
Nov-25	Service Providers	Traverse Body And Paint Center Inc. / Sonny's Body Shop	CollisionRight Inc.	Provides auto body repair and car detailing services.
Oct-25	Service Providers	13 Utah locations from Whistle Express Car Wash	Quick Quack Car Wash Holdings LLC	Operates 13 express car wash locations across Utah.
Oct-25	Retailers & Distributors	Quality Parts Warehouse	Driven Distribution Group	An auto parts distributor based in Garland TX, serving professional installers.
Oct-25	Retailers & Distributors	Burt Brothers Tire & Service	Big Brand Tire & Service	A tire retailer and automotive services provider in Utah.
Oct-25	Service Providers	Richlonn's Tire & Service Centers	GreatWater 360 Auto Care	Operates full service automotive repair and tire locations in Greenfield, Racine, Waukesha, Muskego, and Greendale.
Oct-25	Service Providers	Five Borst Automotive locations	Sun Auto Tire & Service	Offers auto repair and maintenance services in the Greater Tucson and Phoenix area.
Oct-25	Service Providers	Founders-Owned centers of CSN Collision	ONCAP	Provides automotive collision and glass repair services.
Oct-25	Service Providers	Five Stores from Whistle Express Car Wash	Mister Car Wash Inc. (NasdaqGS:MCW)	Operates five express car washes in Lubbock, TX.
Oct-25	Parts Suppliers	King Engine Bearings Inc.	Rakia Capital	Produces engine bearings for automotive, heavy duty, marine, aviation, standby power, and other internal combustion engine applications.
Oct-25	Service Providers	Fawbush Auto Shop Inc.	Classic Collision LLC	Provides automotive collision repair services in Livingston, TX.

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Oct-25	Enthusiast Products	Vintage Air Inc.	LFM Capital LLC	A Texas based manufacturer of aftermarket air conditioning systems for classic and custom vehicles.
Oct-25	Service Providers	Groove Car Wash	Club Car Wash	An express car wash company based in Hurst, TX.
Oct-25	Retailers & Distributors	Bristo Battery and Supply	Tri-State Enterprises	A Texas based warehouse distributor of automotive aftermarket hard parts.
Oct-25	Service Providers	J&W Auto Repair	Puget Collision LLC	Specializes in providing automotive collision repair services.
Oct-25	Service Providers	Vannoy's Tires Inc.	Sun Auto Tire & Service	Offers tire and automotive repair services, including battery replacement, vehicle inspections, and other preventative services.
Oct-25	Enthusiast Products	Leveltron LLC	LCI Industries (NYSE:LCII)	A producer of hydraulic systems for motorhomes and trailers.
Oct-25	Service Providers	Slydes Car Wash	Club Car Wash	Provides car wash and detailing services in Wylie, TX.
Oct-25	Service Providers	Ronnie's Car Care Center	Auto Care Plus LLC	An auto repair shop offering oil changes, brake repair, exhaust repair, and other maintenance services.
Sep-25	Enthusiast Products	Vogue Tyre & Rubber Company	Sailun Tire (USA) Corp.	Specializes in custom luxury tires, wheels, and car accessories.
Sep-25	Service Providers	Advanced Collision Inc.	Classic Collision LLC	An automotive collision repair center serving customers across Tennessee and Georgia.
Sep-25	Service Providers	Royalton Car Wash	Express Wash Concepts LLC	Offers car washing services in North Royalton, OH.
Sep-25	Service Providers	American Canyon Car Wash	LUV Car Wash	Provides car wash and auto detailing services.
Sep-25	Service Providers	Rapid Shine Car Wash	Club Car Wash	A car wash center based in Benton, AR.
Sep-25	Service Providers	Car Body Lab Inc.	Caliber Collision Centers Inc.	Operates as a mobile auto body repair company.
Sep-25	Service Providers	Clean Getaway Express Tunnel Wash	Club Car Wash	An express car wash services provider based in Dubuque, IA.
Sep-25	Service Providers	L&W Emergency Outfitters	Lehr Upfitters LLC	Offers upfitting services for emergency and commercial vehicles.

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Sep-25	Retailers & Distributors	Hindsman & Son Inc.	Sun Auto Tire & Service	A tire retailer and automotive repair service provider based in Russellville, AR.
Sep-25	Service Providers	Jackson Auto Worx Inc.	Sun Auto Tire & Service	Offers auto repair and maintenance services in Winston-Salem, NC.
Sep-25	Retailers & Distributors	Burnett Automotive Inc.	Telle Tire & Auto Service	A Kansas-based company offering tire and automotive services.
Sep-25	Retailers & Distributors	Automotive Distribution Specialists	Rubber Inc.	Operates as an automotive parts distributor in Massachusetts.
Aug-25	Service Providers	Derotic LLC	Vector Fleet Management LLC	Provides repair and maintenance services for commercial fleets and government emergency vehicles.
Aug-25	Service Providers	Jack's Auto Service	Victory Tire & Auto Service Inc.	Offers automotive services, including brake system repairs, oil changes, and scheduled maintenance.
Aug-25	Service Providers	Tommy's Express Car Wash Inc.	LUV Car Wash	Specializes in express car washing services.
Aug-25	Retailers & Distributors	Alliance Auto Body Parts	XL Parts / The Parts House	A regional supplier of aftermarket collision parts for independent body shops and rebuilders.
Aug-25	Service Providers	Evolve	VIVE Collision	Offers EV collision repair and maintenance services.
Aug-25	Retailers & Distributors	Arrow Distributing Inc.	Meyer Distributing Inc.	An aftermarket RV and mobile home parts distributor in Nebraska.
Aug-25	Retailers & Distributors	Northgate Tire Co.	GreatWater 360 Auto Care	Provides automotive tire and repair services in Ohio.
Aug-25	Retailers & Distributors	Rick's Auto Supply	Driven Distribution Group	Operates as an auto parts store based in Cabot, AR.
Jul-25	Retailers & Distributors	Barrett's Tire Co.	Sun Auto Tire & Service	A company specializing in tire sales and vehicle servicing.
Jul-25	Service Providers	Summit Automotive Performance LLC	GreatWater 360 Auto Care	Offers automotive services, including engine diagnostics and oil changes, in San Antonio.
Jul-25	Retailers & Distributors	Staley's Tire & Automotive	Les Schwab Tire Centers Inc.	A commercial tire center specializing in tire sales, automotive repair, and maintenance services.
Jul-25	Retailers & Distributors	Genden Auto Parts Inc.	Fisher Auto Parts Inc.	An auto parts supplier serving both commercial and do-it-yourself (DIY) customers.

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Jul-25	Service Providers	Miller's OK Tire Store	Sun Auto Tire & Service	Offers tire and automotive repair services.
Jul-25	Service Providers	Hubbells Auto Repair Inc.	GreatWater 360 Auto Care	Provides vehicle repair services, including brake repair, oil changes, and HVAC diagnostics.
Jul-25	Service Providers	LOF Xpress Oil Change	Strickland Brothers LLC	Specializes in drive-thru oil change services.
Jul-25	Service Providers	Pods Complete Car Care and Accessories	Victory Tire & Auto Service Inc.	Offers car care services, including engine diagnostics, wheel alignment, and airbag repair.
Jul-25	Service Providers	Rowlett Car Wash	Raceway Car Wash	Offers car wash and detailing services.
Jun-25	Service Providers	Meekhof Tire Sales & Service	Bauer Built	A commercial tire dealer and provider of fleet maintenance & repair services.
Jun-25	Parts Suppliers	Certain assets of ZF North America	Undisclosed	North American brake rotor business serving both OE and aftermarket segments.

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KPMG's Firmwide Dedication to the Automotive Aftermarket

Global Coverage. Industry Knowledge. Middle-Market Focus

KPMG has closed approximately 100 automotive components and retail transactions over the last five years, at times under challenging circumstances and often involving counterparties from around the globe. We have the resources, experience, and stamina to bring every transaction to a successful conclusion.



How KPMG Can Help

KPMG is a recognized leader in identifying and understanding critical trends in the automotive sector, including mobility, autonomy, and electrification. We have helped leading companies in the industry both plan and execute to capitalize on these trends.

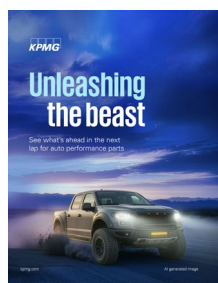
Our data-driven approach allows us to quantify the impacts of trends across the value chain on automakers, dealers, suppliers, and others so they can identify and prioritize emerging opportunities. We then assist clients in developing roadmaps to pursue these opportunities.

For automotive aftermarket companies and investors, we offer the following services*:

- **M&A advisory and capital raising**
- **Carve-out, separation, and transition services advisory**
- **Buy-side and sell-side diligence for investments in the sector**
- **Revenue and cost synergy opportunity assessment**
- **Performance improvement**

**Includes services performed by KPMG LLP Professionals.*

Thought Leadership



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