FROST & SULLIVAN

CONNECTED VEHICLE DATA & DIAGNOSTICS STACK



One Vehicle Data Platform. Multiple Revenue Streams.

MIDDLE EAST AUTOMOTIVE AFTERMARKET CLUSTER-WISE GROWTH OPPORTUNITY SERIES

Who Will Own the Aftermarket Customer?

18
Opportunities

$19.1B
Combined Middle East Opportunity

2026
Earliest Opportunity Window



One connected-data platform sits at the center of a broad set of aftermarket growth opportunities, enabling organizations to unlock multiple revenue streams from a common capability base.

The cluster combines **18 opportunities** worth a combined **$19.1B**, all supported by: **one vehicle-data platform and device fleet**.

Connected Vehicle Data Is Becoming the Aftermarket Operating System

The next competitive advantage may not come from having the largest workshop footprint or the broadest parts portfolio. **It may come from controlling the connected-data layer** that shapes customer relationships, service decisions, fleet performance and recurring revenue opportunities.

Across the connected vehicle ecosystem, the same data foundation supports customer retention, warranty optimization, remote diagnostics, predictive maintenance and ADAS services.



One Capability. Four Strategic Growth Engines.

1 Customer & Warranty Intelligence

Turn Service History into Customer Retention

Connected vehicle data allows organizations to move beyond traditional warranty administration toward real-time defect detection, proactive service alerts and AI-driven claims analytics.

By combining service history, diagnostic insights and warranty data, organizations can improve customer retention, increase first-time-fix rates and maintain stronger control over high-value aftersales relationships.

EXECUTIVE THOUGHT
The opportunity is not simply to process warranty claims faster. It is to influence where the next service event happens.

2 Remote Diagnostics & Connected Services

Extend Aftermarket Reach Beyond the Workshop

Retrofit connectivity, remote diagnostics and expert-support models create new ways to serve vehicles that may never enter a traditional service network.

Connected devices enable health monitoring, fault detection and remote assistance across fleets, workshops and distributed vehicle populations, expanding service reach while reducing dependency on physical workshop interactions.

EXECUTIVE THOUGHT
The most valuable workshop interaction may increasingly be the one that never requires a workshop visit.

3 Predictive Maintenance & Telematics

Shift from Repair Events to Fleet Outcomes

Predictive maintenance transforms connected vehicle data into recurring revenue streams by linking diagnostics, maintenance planning and uptime management.

As telematics adoption increases, organizations can move from reactive repairs to proactive maintenance models that prioritize vehicle availability, cost control and operational performance.

EXECUTIVE THOUGHT
When failures can be predicted, value increasingly comes from preventing breakdowns rather than fixing them.

4 ADAS Service Capability

Build Capability Before Demand Becomes Mandatory

ADAS-related services are creating a new category of aftermarket value built on calibration, diagnostics, sensor maintenance and software-enabled vehicle support.

As vehicle architectures become increasingly software-defined and sensor-dependent, calibration capability becomes a strategic asset rather than a niche service offering.

EXECUTIVE THOUGHT
Tomorrow's service leaders may be defined less by mechanical expertise and more by sensor, software and calibration capability.

The Strategic Question Is Expanding

As vehicles become increasingly connected, competitive advantage may depend less on who services the vehicle and more on who understands customer needs, anticipates service requirements and influences outcomes throughout the ownership journey.

Executive Insight
OEMs, telematics providers and aftermarket firms compete for data access and analytics control; value accrues to whoever owns customer access, data and fulfilment.

Looking Ahead

Organizations that strengthen connected-data capabilities today may be better positioned to:

1. Own a greater share of the connected aftermarket customer journey
2. Improve customer retention and service-network engagement
3. Expand remote diagnostics and connected services
4. Monetize data through subscriptions and analytics
5. Influence service decisions before a repair event occurs
6. Maximize fleet uptime and performance through outcome-driven maintenance.

Executive Discussion

What will create the strongest aftermarket advantage?

- Customer Access?
- Analytics Capability?
- Data Ownership?
- Service Fulfilment Capability?

The answer may shape who captures the next wave of aftermarket value.

Connect with Frost & Sullivan Mobility experts to continue the conversation.

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