

Do you know the old joke about the optimist who falls off a 100-story skyscraper and shouts to the people on the 99th floor, "OK so far!".

As the saying goes, hope spring eternal. At the moment, nobody in the branch can say whether they will have a soft or hard landing in the automobile crisis. A number of automotive suppliers may have no chance at all of surviving a fall from such a great height. And it is impossible to tell whether others will follow suit and go into free fall or whether help is around the corner in the form of some kind of bailout.

Since the middle of the year, state cash for clunker programmes seem to have been helping faltering car markets in Europe, Japan and the USA recover from the slump somewhat, but all the same, sales levels are a long way from what they were.

What will things be like on these markets once the car-scraping schemes run out? It is not much consolation that we will soon find out, and does not make planning for 2010 any easier.

Plus it is unclear whether the growth potential of the markets in the BRIC states (Brazil, Russia, India and China) can cushion falls, despite the fact that China's superlative growth seems to confound even the greatest of expectations every year anew.

In this connection it has to be remembered that these markets are unstable, as evidenced by the setback in Russia. On the other hand, they can also function seemingly autonomously, almost decoupled from the global economic situation, as the positive example of Brazil shows.



It is thus unknown whether the traditional giant suppliers from Europe, Japan and the USA can equally benefit from the gains in the BRIC countries, or whether new, i.e. unknown, market participants will be turning possible home advantage to account.

After all, it is no secret that both India and China have strong domestic OEMs and suppliers. And both these countries have governments that blithely do all they can to protect their home-grown auto industries.

It is thus not without reason that players from emerging countries are putting in a first appearance in the global Top

Innovation as a rescue net

100 ranking – see China's Weichai Power – or returning to it again, as demonstrated by Alfa (Nemak) of Mexico.

On top of all this, there is an urgent need for high investments in research and development due to the rise of new drive technologies and alternative power sources for the hybrid and electric cars of the future. Experience shows that suppliers often foot a large part of the respective bills, and the probability that this will change any time soon is highly unlikely. The only consolation is that this is a factor that will be affecting suppliers all over the world, without exception.

The ultimate question is thus not which supplier is innovative enough, but which one will be taking the relevant innovations to market, and how quickly.

A handwritten signature in black ink that reads "A. Gottwald" with a long, sweeping underline.

Andreas Gottwald,
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TOP 100 AUTOMOTIVE SUPPLIERS

Top 100 Automotive Suppliers 2009

Rank 2009	Company	Sales 08/09 in USD (\$) *	Ranks Won/Lost 2008 vs. 2009	Rank 2008	Rank 2009	Company	Sales 08/09 in USD (\$) *	Ranks Won/Lost 2008 vs. 2009	Rank 2008
1	Bosch	38,987	→	1	51	Eaton	4,122	↑	54
2	Continental	34,852	↑	9	52	Lanxess	3,873	↑	77
3	Denso	29,430	↓	2	53	Saint-Gobain	3,870	→	53
4	Bridgestone	25,429	→	4	54	Yokohama Rubber	3,866	↑	59
5	Johnson Controls	23,941	↑	8	55	TS Tech	3,809	↓	52
6	Magna	23,704	↓	3	56	Getrag	3,740	↑	58
7	Michelin	23,679	↓	5	57	Takata	3,729	↓	47
8	Aisin Seiki	20,562	↓	7	58	Futaba Industrial	3,496	↓	57
9	Goodyear	19,488	↑	10	59	NSK	3,409	↓	55
10	Faurecia	17,687	↑	11	60	Eberspächer	3,299	↑	65
11	Delphi	17,636	↓	6	61	Plastic Omnium (Inergy)	3,198	↑	66
12	ThyssenKrupp	16,521	↑	15	62	Tokai Rika	3,196	↓	56
13	ZF Group	15,648	↑	14	63	Koito	3,068	↓	61
14	TRW Automotive	14,995	↑	16	64	NTN	3,053	↑	74
15	Lear	13,571	↓	12	65	Rheinmetall (Kolbenschmidt Pierburg)	3,026	↑	67
16	Valeo	12,759	↑	17	66	Grupo Antolin	3,019	↑	70
17	Yazaki	12,231	↑	21	67	Leoni	3,010	↑	-
18	BASF	11,928	↑	20	68	Alfa (Nemak)	2,954	↑	-
19	Toyota Boshoku	9,476	→	19	69	Knorr-Bremse	2,908	↑	76
20	Visteon	9,067	↓	18	70	NSG (Pilkington)	2,893	↓	64
21	Sumitomo Electric Industries	8,871	↑	22	71	Cooper Tire & Rubber	2,882	→	71
22	Dana	8,095	↑	23	72	SKF	2,844	→	72
23	Magneti Marelli	8,021	↑	28	73	Pioneer	2,821	↓	63
24	Schaeffler (FAG/INA/LuK)	7,864	↑	25	74	Asahi Glass	2,810	↑	75
25	Hitachi	7,738	↓	24	75	Evonik (Degussa)	2,798	↑	90
26	Mahle	7,235	↑	29	76	TI Automotive	2,782	↓	73
27	ArvinMeritor	7,167	↑	35	77	Hutchinson	2,774	↑	81
28	Cummins	6,884	↑	36	78	Freudenberg	2,752	↓	68
29	Federal Mogul	6,866	↓	27	79	Alps Automotive (Alpine)	2,624	↓	69
30	Benteler	6,744	↑	34	80	NHK Spring	2,622	↑	-
31	GKN	6,704	↑	33	81	Cooper-Standard Automotive	2,595	↑	82
32	Autoliv	6,473	↓	30	82	Wabco	2,588	↑	-
33	Calsonic Kansei	6,465	↓	26	83	Bayer	2,580	↓	80
34	Panasonic (Matsushita Electric)	6,384	↓	32	84	Dräxlmaier	2,562	↑	88
35	Pirelli	6,038	↑	39	85	Illinois Tool Works	2,539	↓	79
36	DuPont	5,970	↓	31	86	Showa	2,511	↑	87
37	Tenneco	5,916	→	37	87	Mann+Hummel	2,378	↑	93
38	JTEKT	5,902	→	38	88	Webasto	2,361	↓	85
39	PPG Industries	5,547	↑	45	89	Timken	2,353	↑	98
40	BorgWarner	5,264	↑	41	90	Toyo Tire & Rubber	2,341	↑	92
41	Toyoda Gosei	5,009	↓	40	91	Tomkins	2,311	↓	86
42	Sumitomo Rubber	4,846	↑	49	92	Tower Automotive	2,172	↓	83
43	Hella	4,811	→	43	93	Tachi-S	2,137	↓	89
44	Behr	4,630	↑	46	94	Peguform	2,132	↑	100
45	Honeywell	4,622	↓	44	95	Alcoa	2,130	↓	51
46	IAC	4,500	↓	42	96	American Axle & Manufacturing	2,109	↓	62
47	Tyco Electronics	4,450	↑	50	97	Karmann	2,062	→	97
48	Mitsubishi Electric	4,254	→	48	98	3M (Automotive)	2,022	↓	96
49	Weichai Power	4,148	↑	-	99	Stanley Electric Group	2,017	↓	95
50	Brose	4,123	↑	60	100	AsahiTec (Metaldyne)	2,014	↓	78

Quellen/ Sources: Unternehmensangaben, Geschäftsberichte, Recherchen/ Company Information, Annual Reports, Enquiries;
* aktuell verfügbares Geschäftsjahr/ last complete business year available; Angaben in Millionen US-Dollar/ figures in millions of US\$

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Exchange Rates – Wechselkurse:

All exchange rates, unless otherwise indicated, are annual average rates of the Federal Reserve Bank of New York * – Alle Umrechnungen und Wechselkurse, sofern nicht anders angegeben, basieren auf den Jahresdurchschnittskursen der Federal Reserve Bank of New York (FED, NYC):

EUR (Euro, €) per USD (US\$, \$):

2008: 1 EUR = 1.4726 USD, 1 USD = 0.6791 EUR;

2007: 1 EUR = 1.3711 USD, 1 USD = 0.7293 EUR.

JPY (Yen, ¥) / USD (\$):

2009 (March, 31)/annual average of 2008:

100 JPY = 0.9672 USD, 1 USD = 103.39 JPY;

2008 (March, 31)/annual average of 2007:

100 JPY = 0.8492 USD, 1 USD = 117.76 JPY;

2007 (March, 31)/annual average of 2006:

100 JPY = 0.8598 USD, 1 USD = 116.31 JPY.

GBP (£) / USD (\$):

2008: 1 GBP = 1.8545 USD, 1 USD = 0.5392 GBP;

2007: 1 GBP = 2.002 USD, 1 USD = 0.4995 GBP.

SEK / USD (\$):

2008: 100 SEK = 15.1870 USD, 1 USD = 6.5846 SEK;

2007: 100 SEK = 14.8039 USD, 1 USD = 6.7550 SEK.

CHF / USD (\$):

2008: 1 CHF = 0.9246 USD, 1 USD = 1.0816 CHF;

2007: 1 CHF = 0.8334 USD, 1 USD = 1.1999 CHF.

CAN / USD (\$):

2008: 1 CAN = 0.9381 USD, 1 USD = 1.0660 CAN;

2007: 1 CAN = 0.93162 USD, 1 USD = 1.0734 CAN.

CNY (RMB) / USD (\$):

2008: 100 CNY = 14.3932 USD, 1 USD = 6.9477 CNY;

2007: 100 CNY = 13.1479 USD, 1 USD = 7.6058 CNY.

MXN (Mex. Peso) / USD (\$):

2008: 100 MXN = 8.9742 USD, 1 USD = 11.1430 MXN;

2007: 100 MXN = 9.1508 USD, 1 USD = 10.9280 MXN.

* Annual average exchange rates = averages of daily noon buying rates for cable transfers in NYC as certified for customs purposes by the FED New York during the periode.