

Automotive Suppliers - World

Market Analysis – 2016-2020 Trends – Corporate Strategies

Publication date: December 2015

Exclusive extracts from this 222-page-long report:

- What is the business?

Car part suppliers design, manufacture and assemble a huge array of components, modules and systems. Products range from simple plastic parts to highly complex electronic systems and are grouped around the following business lines: audio & telematics, electronics & electrical, engine, climate control and engine cooling, transmission, braking, suspension, axles, driveshafts and components, exhausts, wheels and tyres, fuel systems, interiors, body and structural, body glass, passenger restraints, and steering. [...]

- Who are the key players?

Carmakers have become increasingly globalised and their suppliers have and continue to follow them. Furthermore, global platform architectures are increasingly used for production, resulting in considerable component standardisation and thus huge contacts for these standard parts. Only major suppliers have the capacity to provide such quantities and keep up with their customers geographically. Smaller suppliers are therefore being left out of the equation, leading to an era of mega-suppliers. [...] Companies analysed in the report include: **Bosch, Continental, Johnson Controls, Denso, Magna, Hyundai Mobis, Aisin, Faurecia, ZF Friedrichshafen, Lear, Delphi Automotive, Valeo and Visteon.**

- How intense is competition?

Globalisation of the industry has intensified competition. While carmakers have traditionally focused on their home markets, they are now expanding into both developed and developing markets and are often followed by their national suppliers, who then begin competing with local suppliers. Furthermore, component suppliers in low-cost markets have improved their quality and are now on par with developed markets suppliers. [...]

- What are the main markets?

Around 70% of demand for car parts is generated by carmakers for new vehicle production. This means that the car part industry is highly determined by the health of its clients and demand for vehicles. The remaining 30% of demand for car parts is made up by the aftermarket (parts and accessories purchased after the initial vehicle purchase) which is driven by more stable and somewhat counter-cyclical demand as, the less end-users buy new cars, the more they are liable to purchase spare parts for older vehicles. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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