

SUPPLEMENT TO

© 2014 Crain Communications Inc. All rights reserved.

Automotive News

JUNE 16, 2014

SPONSORED BY:


pwc



TOP SUPPLIERS

North America,
Europe and the world

It becomes clear

Your current situation. The path forward. Your options. Your needs and responsibilities. When you have quality, integrity and trust as a foundation for doing business, the issues become clear and often so do the answers.

PwC's global automotive professionals are ready to help you find practical and innovative strategies to manage your supply chain. From operational strategies to expanding in emerging markets, our team has deep industry experience and knowledge in automotive product development, manufacturing, supply chain and sourcing.

To see our latest automotive supplier publications, please visit www.pwc.com/auto or scan below:



Global suppliers are striving to bring automakers technology that will cut weight, connect cars to the Internet and boost mileage. Asia is still a hot growth market, North America is strong, and the worst is over in Europe. This supplement to *Automotive News* is a portrait of the top 100 suppliers in the world, with separate lists of the top suppliers in Europe and North America.

> **INSIDE:** Top 100 Global Suppliers | **PAGES 3-8** | Top 100 Europe Suppliers | **PAGE 9** | Top 100 North American Suppliers | **PAGES 10-15** |

Interior designers start long-awaited consolidation

David Sedgwick
dsedgwick@crain.com

When it comes to high-tech components such as turbochargers, airbags and transmissions, automakers often want their suppliers supersized — the bigger, the better.

But that hasn't been the case with interior trim. Instead, the segment has remained stubbornly fragmented, in part because automakers have resisted ordering complete interiors from suppliers. That leaves various vendors shaving pennies off the prices of their glove boxes, instrument panels, consoles, carpeting and door panels.

But now, the interiors market appears to be restructuring, step by step.

A core group of interior suppliers is emerging — an eclectic mix of European vendors, a Chinese joint venture and a company built by a canny Wall Street financier's string of acquisitions.

It isn't clear yet whether they'll completely consolidate the interiors market, but they're giving it a try. Here's where they stand on *Automotive News'* list of the top 100 global suppliers:

■ A joint venture announced May 18 of Yanfeng and Johnson Controls expects annual sales of \$7.5 billion plus a big share of the fast-growing China market. That sales figure would have placed it 31st on the global list last year.

■ French supplier Faurecia, No. 7 on the

list, opened its checkbook in 2012 to expand in North America by purchasing Ford's interior trim operation.

■ After a string of 16 acquisitions over its eight-year existence, IAC Group has edged up to No. 42, and now the company is building a presence in China.

The Yanfeng-Johnson Controls alliance announced last month enjoys intriguing growth prospects.

Yanfeng is owned by the in-house supplier to Shanghai Automotive Industry Corp., China's biggest automaker.

Last August, Yanfeng acquired Visteon's half of the Visteon-Yanfeng joint venture that produced interior parts. The deal allowed Visteon to exit the interiors business, while Yanfeng inherited Visteon's portfolio of products, technology and factories.

With a portfolio of international customers plus a well-equipped r&d center in Shanghai, Yanfeng is a cut above the stereotypical Chinese supplier.

Like Visteon, Johnson Controls wanted to bail out of the interiors sector, and the new partnership with Yanfeng will allow it to do so. With a 30 percent stake in the joint venture, Johnson Controls will minimize its financial exposure, yet reap some profits as the venture grows.



Kamsickas: Choosing customers carefully

In a May 16 interview with *Automotive News*, Alex Molinaroli, CEO of Johnson Controls, said the joint venture with Yanfeng will have a good mix of customers at the low and high end of the market.

In the interiors segment, Johnson Controls enjoyed good sales among premium brands, while Yanfeng targeted the entry-level market.

"We believe we'll be able to gain market share," Molinaroli said. "We've already right-

sized our business in Europe. That business is profitable."

Step by step

Like Molinaroli, James Kamsickas, CEO of IAC, believes interior suppliers can make money if they focus on the right markets and pick their customers carefully.

During the recession, automakers struggled to prop up marginal suppliers — an onerous task in the fragmented interiors market. Some automakers learned their lesson and fostered closer relations with their most reliable suppliers, Kamsickas said.

"Some automakers are really disciplined, and some have regressed to price, price and more price," Kamsickas said. So suppliers have to pick their automaker customers carefully, he added.

Like JCI and other suppliers, IAC has in-

vested heavily in China while cutting unneeded capacity in Western Europe. The company has 11 plants in China and is adding one new plant per year, Kamsickas said.

Meanwhile, the company has shuttered a factory in Germany and will close another in the Benelux region late this year or early next year.

"It's a step-by-step process," Kamsickas said. "We'll follow our customers and put our production capacity where it needs to be."

IPO in the works?

Kamsickas says he's satisfied with his company's product portfolio, which includes instrument panels, headliners, door panels and consoles — but not seats or steering wheels.

Has IAC grown to the point where it can launch its long-awaited initial public offering?

On Dec. 5, Bloomberg News reported that IAC would delay its IPO until this year.

Now that 2014 is here, Kamsickas declined to discuss a possible IPO. But he asserted that his company is big enough to prosper — with or without an industry-wide shakeout.

"There already has been enough consolidation in high-cost markets," Kamsickas said. "I don't really see that a massive consolidation would change IAC's global position." **AN**

Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Executive	Total global automotive parts sales (dollars in millions) 2013	Total global automotive parts sales (dollars in millions) 2012	Percent North America 2013	Percent Europe 2013	Percent Asia 2013	Percent rest of world 2013	Products	2012 rank
1	Robert Bosch GmbH (49) 711-811-0; bosch.com	Postfach 106050 Stuttgart D-70049, Germany	Volkmart Denner chairman	\$40,183 e	\$36,787 e	18	53	25	4	Gasoline systems, diesel systems, chassis system controls, electrical drives, starter motors & generators, car multimedia, electronics, steering systems, battery technology, exhaust gas turbochargers & treatment systems, systems, service solutions	1
2	Denso Corp. (81) 566-25-5511; globaldenso.com	1-1 Showo-cho Kariya, Aichi 448-8661, Japan	Nobuaki Kato president & CEO	35,849 fe	34,200 fe	20	12	67	2	Thermal, powertrain control, electronic & electric systems; small motors, telecommunications	2
3	Magna International Inc.* (905) 726-2462; magna.com	337 Magna Drive Aurora, Ontario L4G7K1, Canada	Donald Walker CEO	34,375	30,428	51	41	5	3	Body, chassis, interiors, exteriors, seating, powertrain, electronics, vision, closure & roof systems & modules complete vehicle engineering & contract manufacturing	4
4	Continental AG (49) 511-938-01; continental-corporation.com	Vahrenwalder Strasse 9 Hanover 30165, Germany	Elmar Degenhart CEO	33,500 fe	32,800 fe	23	49	25	3	Electronic brakes, stability management systems, tires, foundation brakes, chassis systems, safety system electronics, telematics, powertrain electronics, interior modules, instrumentation, technical elastomers	3
5	Aisin Seiki Co. (81) 566-24-8441; aisin.co.jp	2-1 Asahi-Machi Kariya, Aichi 448-8650, Japan	Fumio Fujimori president	27,125 fe	30,080 fe	16	8	75	1	Body, brake & chassis systems, electronics, drivetrain & engine components	5
6	Hyundai Mobis (82) 2-2018-5114; mobis.co.kr	679-4 SI Tower, Yeoksam1-dong, Gangnam-gu, Seoul 135-977, Korea	Chung Myung-Chul president & CEO	24,677 f	21,351 f	21	11	67	1	Chassis, cockpit & front-end modules; ABS, ESC, MDPS, airbags, LED lamps, ASV parts, sensors, electronic control systems, hybrid car powertrains, parts & power control units	8
7	Faurecia (33) 1-72-36-70-00; faurecia.com	2 Rue Hennape Nanterre 92735, France	Yann Delabriere chairman & CEO	23,950	22,500	27	54	13	6	Seating, emissions control technologies, interior systems, exteriors	7
8	Johnson Controls Inc. (414) 524-1200; johnsoncontrols.com	5757 N. Green Bay Ave. Milwaukee, WI 53201, USA	Alex Molinaroli chairman & CEO	23,440 f	22,515 f	47	42	11	–	Seating, overhead systems, door & instrument panels, center & overhead consoles & interior electronics; lead acid & hybrid vehicle batteries	6
9	ZF Friedrichshafen AG (49) 7541-77-0; zf.com	Graf-von-Soden-Platz 1, Friedrichshafen, Baden-Wuerttemberg 88046, Germany	Stefan Sommer CEO	20,434 f	18,843 f	18	58	18	6	Transmissions, chassis components & systems, steering systems, clutches, dampers	9
10	Lear Corp. (248) 447-1500; lear.com	21557 Telegraph Road Southfield, MI 48033, USA	Matthew Simoncini president & CEO	16,234	14,567	38	38	18	6	Seating & electrical distribution systems	11
11	TRW Automotive Holdings Corp. (734) 855-2600; trwauto.com	12001 Tech Center Drive Livonia, MI 48150, USA	John Plant chairman, president & CEO	16,147	14,141	36	41	19	4	Steering, suspension, braking & engine components; fasteners, occupant-restraint systems, electronic safety & security systems	13
12	Yazaki Corp. (81) 0559-65-3002; yazaki-group.com	1500 Mishuku, Susono City, Shizuoka Prefecture 410-1194, Japan	Yasuhiko Yazaki chairman	15,600 e	15,801 fe	24	–	–	–	Wiring harnesses, connectors, junction boxes, power distribution boxes, instrumentation, high voltage systems	10
13	Delphi Automotive (248) 813-2000; delphi.com	5725 Delphi Drive Troy, MI 48098, USA	Rodney O'Neal president & CEO	15,475	14,432	34	39	16	11	Mobile electronics; powertrain, safety, thermal, controls & security systems; electrical/electronic architecture; in-car entertainment technologies	12
14	Valeo SA (33) 1-40-55-20-20; valeo.com	43 Rue Bayen Paris 75017, France	Jacques Aschenbroich CEO	13,666 e	12,816 e	19	50	26	5	Micro hybrid systems, electrical & electronic systems, thermal systems, transmissions, wiper systems, camera/sensor technology, security systems, interior controls	15
15	Sumitomo Electric Industries (81) 6-6220-4141; sei.co.jp	5-33 Kitahama, 4-chome, Chuo-ku Osaka City 541-0041, Japan	Masayoshi Matsumoto president & CEO	12,851 fe	11,389 f	22	–	–	–	Electrical distribution systems, electronics, connection systems	16
16	BASF SE (49) 621-60-0; basf.com	Carl-Bosch-Strasse 38 Ludwigshafen 67056, Germany	Kurt Bock chairman	12,351	13,168	20	58	16	6	Coatings, catalysts, engineering plastics, polyurethanes, coolants, brake fluids, battery materials	14
17	JTEKT Corp. (81) 52-527-1900; jtekt.co.jp	15th Floor, Midland Square, 4-7-1 Meiki Nakamura-ku, Nagoya 450-8515, Japan	Tetsuo Agata president	11,351 f	9,793 f	17	13	68	2	Bearings, steering systems, driveline systems & machine tools	18
18	Toyota Boshoku Corp. (81) 566-23-6611; toyota-boshoku.com	1-1 Toyoda-cho Kariya-shi, Aichi 448-8651, Japan	Shuhei Toyoda president	9,482 fe	10,484 fe	16	6	76	2	Seats, door trim, carpet, headliners, oil & air filters, door panels, fabrics & substrates	17
19	Autoliv Inc. (46) 8-587-20-600; autoliv.com	Vasagaten 11 Box 70381 Stockholm, SE-107 24, Sweden	Jan Carlson president & CEO	8,803	8,267	33	33	34	–	Airbags, seat belts, safety electronics, steering wheels	22
20	Hitachi Automotive Systems (81) 3-4232-5300; hitachi-automotive.co.jp/en/	Shin-Otemachi Bldg., 2-1, Otemachi 2-chome, Chiyoda-ku, Tokyo 100-0004, Japan	Kunihiko Ohnuma chairman & CEO	8,760 fe	8,218 fe	22	–	–	–	Engine management, electric powertrain, drive control systems	19
21	CalsonicKansei Corp. (81) 3-5385-0111; calsonickansei.com	2-1917 Nisshin-cho, Kita-ku Saitama-city, Saitama 331-8501, Japan	Hiroshi Moriya president, CEO & COO	8,580 fe	7,440 fe	25	10	21	44	Climate control, engine cooling & exhaust systems; instrument clusters, console boxes, cockpit modules, instrument panels, front-end modules	23
22	Mahle GmbH (49) 711-501-0; mahle.com	Pragstrasse 26-46 Stuttgart 70376, Germany	Heinz Junker chairman & CEO	8,506 f	7,081 f	22	47	20	11	Piston systems, cylinder components, valvetrain systems, air & liquid management systems, powertrain engineering, vehicle climatization, engine & powertrain cooling	30

e = estimate f = fiscal year fe = fiscal year estimate

*Magna International Inc. percent rest of the world for 2012 may include countries in North America, Europe and Asia.

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Executive	Total global automotive parts sales (dollars in millions) 2013	Total global automotive parts sales (dollars in millions) 2012	Percent North America 2013	Percent Europe 2013	Percent Asia 2013	Percent rest of world 2013	Products	2012 rank
23	Panasonic Automotive Systems Co. (81) 6-6908-1121; panasonic.net	1006, Oaza Kadoma Kadoma City, Osaka 571-8501, Japan	Kazuhiro Tsuga president	\$8,307 f	\$7,937 f	21	10	54	15	Audio & video equipment, cameras, premium audio systems, music streaming service, navigation systems, compressors, batteries, motors, monitors; sensors; switches, HUD	–
24	Schaeffler AG (49) 9132-82-0; schaeffler.com	Industriestrasse 1-3 Herzogenaurach 91074, Germany	Klaus Rosenfeld CEO	8,165	7,658	16	56	23	5	Antifriction bearings, engine components chassis & transmissions, wheel & axle bearings, clutch & transmission systems, dampers	21
25	Cummins Inc. (812) 377-5000; cummins.com	500 Jackson St. Columbus, IN 47201, USA	Tom Linebarger chairman & CEO	7,900	9,025 e	52	16	21	11	Diesel & natural gas engines	20
26	Benteler Automobiltechnik GmbH (49) 5254-81-0; benteler.com	An der Talle 27-31 Paderborn 33102, Germany	Thomas Wuensche president & CEO	7,720 e	7,643 e	30	56	10	4	Chassis & exhaust systems, structural products, engine application components, bumper/impact management, lightweight solutions	24
27	Gestamp Automocion SA (34) 91-379-19-99; gestamp.com	Alfonso XII, 16 Madrid 28014, Spain	Francisco Riberas president & CEO	7,670	7,599	14	62	10	14	Body-in-white stamping & assemblies, chassis, hinges, power systems	25
28	Magneti Marelli S.p.A. (39) 02-972-27-111; magnetimarelli.com	Viale Aldo Borletti 61/63 Corbetta, Milan 20011, Italy	Eugenio Razelli president & CEO	7,665 f	7,073 f	12	64	10	14	Lighting, powertrain transmissions, electronics, suspension systems, active & passive shock absorbers, exhaust systems, plastic parts	31
29	Toyota Gosei Co. (81) 052-400-1055; toyoda-gosei.co.jp	1 Haruhinagahata Kiyosu Aichi 452-8564, Japan	Hajime Wakayama chairman	7,600 fe	7,200 fe	20	4	76	–	Sealing systems, interior systems, optoelectronics, exterior trim, safety systems, rubber & plastic functionals, fuel systems	28
30	GKN (44) 1527-533-600; gkn.com	P.O. Box 2148 Redditch, Worcestershire B98 0WR, UK	Andy Reynolds Smith CEO, Automotive	7,503	6,438	33	39	23	5	Driveline halfshafts, driveshafts & awd; powder metal engine & transmission components; structures & chassis systems	34
31	Visteon Corp. (734) 710-5000; visteon.com	One Village Center Drive Van Buren Township, MI 48111, USA	Timothy Leuliette president & CEO	7,439	6,860	19	30	46	5	Climate-control systems, electronics, interiors	32
32	BorgWarner Inc. (248) 754-9200; borgwarner.com	3850 Hamlin Road Auburn Hills, MI 48326, USA	James Verrier president & CEO	7,437	7,183	30	48	22	–	Turbochargers, engine valve-timing & ignition systems, emissions systems, thermal systems, transmission-clutch systems, transmission-control systems & torque management systems	29
33	JATCO (81) 545-51-0754; jatco.co.jp	700-1, Imaizumi Fuji-city, Shizuoka 417-8585, Japan	Seiji Honda COO	7,005 fe	7,146 f	21	1	78	–	Automatic transmissions, continuously variable transmissions	27
34	Dana Holding Corp. (419) 887-3000; dana.com	3939 Technology Drive Maumee, OH 43537, USA	Roger Wood CEO	6,769	7,224	44	29	12	15	Axles, driveshafts, sealing & thermal management products	26
35	Hyundai-WIA Corp. (82) 55-280-9114; hyundai-wia.com	391-8 Gaeumjeong-dong, Changwon, Gyeongnam 641110, Korea	Yoon Jun-Mo president & CEO	6,741 f	5,885 f	–	6	85	9	Halfshafts, sideshafts, engines, manual transmissions/transaxles, transfer cases, power transfer units, chassis modules, axles	38
36	HELLA KGaA Hueck & Co. (49) 2941-38-0; hella.com	Rixbecker Strasse 75 Lippstadt 59552, Germany	Rolf Breidenbach CEO	6,700 fe	6,505 f	21	53	26	–	Electronic & lighting components & systems	33
37	Plastic Omnium Co. (33) 1-40-87-64-00; plasticomnium.com	1 Rue du Parc Levallois Cedex 92533, France	Laurent Burelle chairman & CEO	6,425	5,585	30	48	17	5	Fascias, front-end modules, rear-end modules, fenders, body panels, fuel systems	40
38	Brose Fahrzeugteile GmbH (49) 9561-21 0; brose.com	Ketschendorfer Strasse 38-50 Coburg 96450, Germany	Juergen Otto CEO	6,212	5,778	23	55	19	2	Window regulators, door modules, seat adjusters, closure systems, power closure systems, seat adjusters, power head restraints, electric drives & motors, electronics	39
39	NSK (81) 3-3779-7111; nsk.com	Nissei Bldg, 1-6-3- Ohsaki, Shinagawa-ku, Tokyo 141-8560, Japan	Norio Otsuka president & CEO	5,905 f	4,596 f	14	14	72	–	Bearings, hub bearings, steering columns, electric power steering, automatic transmission products	46
40	Samvardhana Motherson Group (91) 120-6679551; motherson.com	Plot No. 1, Sector 127 Noida, U.P. 201301, India	Vivek Chaand Sehgal chairman	5,400 f	4,140 f	7	48	42	4	Wiring harnesses, rearview mirrors, molded plastic parts & assemblies, injection moulding tools, molded & extruded rubber components, automotive modules & systems	–
41	Mitsubishi Electric Corp. (81) 03-3218-2111; mitsubishielectric.com	2-7-3 Marunouchi, Chiyoda-ku Tokyo 100-8310, Japan	Masski Sakuyama executive officer president & CEO	5,344 fe	6,000 fe	8	8	81	2	Engine management, ignition, audio & navigation systems; alternators & starter motors	37
42	IAC Group (35) 2-267504-0; iacgroup.com	4, rue Lou Hemmer Findel L-1748, Luxembourg	James Kamsickas president & CEO	5,200	4,700	54	42	4	–	Instrument panels, consoles, cockpits, doors & trim, flooring, acoustics, headliners & overhead systems, other interior & exterior components	45
43	Mando Corp. (82) 31-680-6114; mando.com	32, Hamanho-gil, Poseung-eup, Pyeongtaek-si, Gyeonggi-do 451-821, Korea	M.W. Chung CEO	5,145 f	4,689 f	19	1	79	1	Brake, steering & suspension systems & components	46
44	Takata Corp. (81) 0-3-3582-3222; takata.com	ARK Hills South Tower 11F, 4-5 Roppongi, 1-chome, Minato-ku, Tokyo, 106-8488, Japan	Shigehisa Takada chairman & CEO	5,028 f	4,861 f	40	26	34	–	Airbags, seat belts, electronics, steering wheels, interior trim & textiles	44
44	Koito Manufacturing (81) 3-3443-7111; koito.co.jp	4-8-3 Takanawa, Minato-ku Tokyo 108-8711, Japan	Takashi Ohtake chairman & CEO	5,028 f	5,243 f	13	2	9	75	Exterior lighting	42

e = estimate f = fiscal year fe = fiscal year estimate

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crai.com

Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Executive	Total global OEM automotive parts sales (dollars in millions) 2013	Total global OEM automotive parts sales (dollars in millions) 2012	Percent North America 2013	Percent Europe 2013	Percent Asia 2013	Percent rest of world 2013	Products	2012 rank
46	Flex-N-Gate Corp. (217) 278-2600; flex-n-gate.com	1306 E. University Ave. Urbana, IL 61802, USA	Shahid Khan president & CEO	\$4,650	\$4,340	91	6	1	2	Plastic & steel bumpers; fascias, stampings, mechanical assemblies, running boards, prototype sheet metal, interior & exterior plastic, towing hitches, body-in-white stampings, roll forming, lighting	49
47	TS Tech Co. (81) 48-462-1121; tstech.co.jp	3-7-27 Sakae-cho, Asaka-shi, Saitama-ken 351-0012, Japan	Michio Inoue president	4,436 f	3,717 f	45	–	13	42	Seats, interior trim, roof & door liners	53
48	Nemak (52) 81-8748-5200; nemak.com	Libramiento Arco Vial Km. 6.8 Garcia, NL 66000, Mexico	Armando Tamez CEO	4,391	3,902	63	32	4	1	Aluminum cylinder heads, engine blocks, transmission & other components	52
49	Tokai Rika Co. (81) 587-95-5211; tokai-rika.co.jp	3-260 Toyota, Oguchi-cho Niwa-gun, Aichi 480-0195, Japan	Yuzo Ushiyama president	4,350 fe	4,537 fe	21	5	22	52	Switches, steering wheels, airbags, shifters, key cylinders & lock sets, 48 interior & lever combination switches; floor transmission shift levers	48
50	Federal-Mogul Corp. (248) 354-7700; federalmogul.com	26555 Northwestern Hwy. Southfield, MI 48033, USA	Rainer Jueckstock & Daniel Ninivaggi, Co-CEOs	4,200 e	4,300 e	34	49	–	17	Pistons, rings, cylinder liners, piston pins, ignition & spark plugs, bearings, valve seats & guides, gaskets, seals, heat shields, brake friction materials & products, systems protection products, lighting products, wipers, fuel pumps	50
51	NTN Corp. (81) 6-6443-5001; ntn.co.jp/japan	3-17, 1-chome, Kyomachibori, Nishi-ku Osaka 550-0003, Japan	Yasunobu Suzuki chairman & CEO	4,102 fe	4,250 fe	27	26	47	–	Constant velocity joints, axle bearings, needle roller bearings, tapered roller bearings, intelligent in-wheel parts for EVs	35
52	Goodyear Tire & Rubber Co. (330) 796-2121; goodyear.com	200 Innovaton Way Akron, OH 44316, USA	Richard Kramer chairman, president & CEO	4,000 e	4,300 e	44	35	11	10	Tires	50
53	Draexlmaier Group (49) 8741-47-0; draexlmaier.com	Landshuter Strasse 100 Vilsbiburg, Bavaria 84137, Germany	Fritz Draexlmaier chairman & CEO	3,910 e	3,010	12	84	3	1	Electrical systems, electrical & electronic components, interior systems & functionally integrated modules, cockpit assemblies	64
54	Hyundai Powertech Co. (82) 41-661-9114; powertech.co.kr	958 Chungui-Ro, Jigok-myun, Seosan-shi, Chungnam 356-863, Korea	Jung Il-soo CEO	3,885 e	2,858 e	32	5	62	1	Automatic transmissions	70
55	Eberspaecher Gruppe GmbH* (49) 711-939-00; eberspaecher.com	Eberspaecherstrasse 24, Esslingen, Baden-Wuerttemberg 73730, Germany	Heinrich Baumann, COO & Martin Peters, CFO & managing partners	3,711 e	3,581 e	25	69	3	3	Silencers, catalytic converters, particulate filters, manifolds, vehicle heaters, electrical vehicle heaters, electronics	55
56	Leoni AG (49) 911-2023-0; leoni.com	Marienstrasse 7 Nuremberg 90402, Germany	Klaus Probst president & CEO	3,710 fe	3,600 fe	14	62	21	3	Wires & strands, optical fibers, cables, cable systems, wiring systems, fuse & relay boxes, special connectors	54
57	Grupo Antolin (34) 947-47-7700; grupoantolin.com	Ctra. Madrid-Irun Km. 244'8 Burgos E09007, Spain	Jose Antolin president	3,625	3,465 fe	27	56	11	6	Overhead systems, door module & panels, window regulators, seat functions, interior & exterior lighting	56
58	Webasto SE (49) 89-857-940; webasto.com	Kraillinger Strasse 5 Stockdorf 82131, Germany	Holger Engelmann chairman	3,294 f	3,077 f	19	47	34	–	Sunroofs, panorama roof systems, convertible roof systems, vehicle pre-heating systems	61
59	KSPG AG (49) 7132-33-0; kspg.com	Karl Schmidt Strasse Neckarsulm 74172, Germany	Horst Binnig CEO	3,268	2,392	13	72	9	6	Pistons, emission control products, oil/water pumps, engine blocks, manifolds, bearings	79
60	Martinrea International Inc. (416) 749-0314; martinrea.com	3210 Langstaff Road Vaughan, Ontario L4K 5B2, Canada	Nick Orlando president & CEO	3,222 f	2,901 f	78	19	–	3	Body, chassis & fluid handling components; assemblies & modules	68
61	Honeywell (973) 455-2000; honeywell.com	101 Columbia Road Morristown, NJ 07962, USA	Dave Cote chairman & CEO	3,217	3,083	16	64	19	1	Turbochargers, friction materials & brake systems	60
62	American Axle & Mfg. Holdings Inc. (313) 758-2000; aam.com	One Dauch Drive Detroit, MI 48211, USA	David Dauch chairman, president & CEO	3,207	2,931	82	4	8	6	Driveline & drivetrain systems & related components	66
63	TI Automotive (248) 494-5000; tiautomotive.com	1272 Doris Road Auburn Hills, MI 48326, USA	Bill Kozyra chairman, president & CEO	3,200 e	3,000 e	26	41	29	4	Fluid storage, carrying & delivery technology	63
64	Showa Corp. (81) 485-54-1151; showa1.com	1-14-1 Fujiwara-cho, Gyoda-city Saitama Prefecture 361-8506, Japan	Yoichi Hojo president	3,171 fe	2,964 fe	23	2	69	6	Shock absorbers, power steering gearboxes & pumps; propeller shafts, gas springs	65
65	Bayer MaterialScience AG (49)214-30-25363; materialsience.bayer.com	Bldg. K12 Leverkusen 51368, Germany	Patrick Thomas CEO	3,145 e	3,053 e	18	34	35	13	Polycarbonates, polyurethanes, adhesives, sealants & raw materials for coatings	62
66	Keihin Corp. (81) 03-3345-3411; keihin-corp.co.jp	Shinjuku Nomura Bldg. 39F 1-26-2 Nishi-shinjuku, Shinjuku-ku Tokyo, 163-0539, Japan	Tsuneo Tanai president	3,136 fe	2,650 fe	32	2	66	–	Air & fuel management systems; electronic systems, HVAC systems, electronic management systems	72
67	Cooper-Standard Automotive (248) 596-5900; cooperstandard.com	39550 Orchard Hill Place Drive Novi, MI 48375, USA	Jeffrey Edwards CEO	3,091 fe	2,881 fe	52	35	6	7	Sealing & trim, fuel & brake delivery, fluid transfer, thermal & emissions & antivibration systems, subsystems & modules	69
68	DuPont (302) 774-1000; dupont.com	1007 Market St. Wilmington, DE 19898, USA	Ellen Kullman chairman & CEO	3,000	3,100	30	30	30	10	High-performance polymers, elastomers, renewable sourced polymers, fibers & fluoropolymers; battery separator & electronic material technologies, fabricated products, advanced composite materials, specialty chemicals, lubricants, refrigerants, films, bio-based fuels	59

e = estimate f = fiscal year fe = fiscal year estimate

*Previously Eberspaecher Holding GmbH

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Executive	Total global automotive parts sales (dollars in millions) 2013	Total global automotive parts sales (dollars in millions) 2012	Percent North America 2013	Percent Europe 2013	Percent Asia 2013	Percent rest of world 2013	Products	2012 rank
69	Iochpe-Maxion SA (55) 11-5508-3800; iochpe.com	Rua Luigi Galvani 146-13 andar Sao Paulo, SP 04575-020, Brazil	Dan Ioschpe CEO	\$2,845 f	\$2,921 f	24	31	7	38	Wheels, structural components	67
70	Linamar Corp. (519) 836-7550; linamar.com	287 Speedvale Ave. W. Guelph, Ontario N1H 1C5, Canada	Linda Hasenfratz CEO	2,630	2,339	79	11	9	2	Engine camshafts, connecting rods, cylinder heads & blocks, balance shaft assemblies, fuel rails, transmission gears, differentials, clutch modules, shafts & shell assemblies, all-wheel-drive systems	80
71	Dow Automotive/Related Businesses* (248) 391-6300; dowautomotive.com	1250 Harmon Road Auburn Hills, MI 48326, USA	Steve Henderson president	2,600	1,100	31	34	20	15	Glass bonding adhesives, structural adhesives, epoxy composites, polyurethane foams, acoustic foams, elastomers, fluids	–
72	Leopold Kostal GmbH (49) 2351-16-0; kostal.com	An der Bellmerlei 10 Luedenscheid NRW 58513, Germany	Andreas Kostal chairman	2,538	2,273	16	55	22	7	Steering column modules, roof modules, center console modules, body control units, door control units, seat control units, control panels & switches, connector systems	81
73	Mitsuba Corp. (81) 277-52-0111; mitsuba.co.jp	2681, 1-chome, Hirosawa-cho, Kiryu, Gunma Prefecture 376-8555, Japan	Yuichi Nagase president	2,526 fe	2,470 fe	24	5	68	3	Wiper systems, power window motors, starter motors, fan motors, seat motors, sunroof motors, power slide door assemblies, power tailgate systems	77
74	Inteva Products (248) 655-8886; intevaproducts.com	1401 Crooks Road Troy, MI 48084, USA	Lon Offenbacher president & CEO	2,500 f	2,800 f	44	36	20	–	Closure systems, interior systems; motors, electronic & roof systems	71
75	CIE Automotive S.A. (34) 94-605-62-00; cieautomotive.com	Alameda Mazarredo 69- 8C Bilbao, Vizcaya 48009, Spain	Jesus Maria Herrera CEO	2,440	2,190	24	47	4	25	Engine & powertrain components, chassis & steering components, exterior & interior trim, roof systems components	83
76	Hyundai Dymos Inc. (82) 31-369-9914; hyundai-dymos.com/er/	703-2, Galhyun-ri, Seongyoum-myun Seosan-si, Chungnam, Korea	Yeo Seung-dong CEO	2,434 f	1,880 f	1	13	81	5	Transmissions, axles, seating systems	90
77	Tokai Rubber Industries (81) 568-77-2121; tokai.co.jp	3-1 Higashi, Komaki Komaki City, Aichi 485-8550, Japan	Yoshiaki Nishimura president	2,431 fe	1,941 fe	20	12	65	3	Antivibration molded rubber, fuel delivery systems	89
78	Infineon Technologies AG (49) 89-234-0; infineon.com	Am Campeon 1-12 Neubiberg 85579, Germany	Reinhard Ploss CEO	2,411 e	2,170 e	17	47	36	–	Microcontrollers, intelligent sensors; power semiconductors & power modules for powertrain (combustion, hybrid, electric); safety & body & convenience applications	78
79	Nexteer Automotive (989) 757-5000; nexteer.com	3900 E. Holland Road Saginaw, MI 48601, USA	Laurent Bresson president & COO	2,387	2,200	71	13	15	2	Electric power steering, hydraulic power steering, steering columns, halfshafts	82
80	Alpine Electronics Inc. (81) 246-36-4111; alpine.com	20-1 Yoshima-Kogyodanchi Iwaki, Fukushima 970-1192, Japan	Toru Usami CEO	2,300 fe	2,600 fe	32	43	15	10	Navigation, telematics, drive assist, sound & video systems	73
81	TrelleborgVibracoustic (49) 6151-3964-214; tbvc.com	Europaplatz 4 Darmstadt, Hessen 64293, Germany	Hans-Jurgen Goslar CEO	2,200 e	2,000 e	23	59	12	6	Engine mounts, chassis mounts, chassis bushings, exhaust mounts, MCU spring carrier, bumpers, torsional vibration dampers, air springs & tuned mass dampers	87
82	Bridgewater Interiors (313) 842-3300; bridgewater-interiors.com	4617 W. Fort St. Detroit, MI 48209, USA	Ronald Hall Sr. CEO	2,180 f	1,839 f	100	–	–	–	Seating systems	–
83	CITIC Dicastal Co. (86) 335-5358549; dicastal.com	No.185 Longhai Road Qinhuangdao, Hebei 066011, China	Zuo Xu general manager	2,107 f	1,881 f	25	26	48	1	Aluminum alloy wheels, aluminum casting parts	92
84	Tower International (248) 675-6000; towerinternational.com	17672 N. Laurel Park Drive, Ste. 400E Livonia, MI 48152, USA	Mark Malcolm president & CEO	2,102	2,051	46	36	9	9	Body structures & assemblies, lower vehicle frames & structures, chassis modules & systems, suspension components	85
85	Akebono Brake Industry Co. (81) 3-3668-5171; akebono-brake.com	19-5 Nihonbashi Koamicho Chuo-ku Tokyo 103-8534, Japan	Hisataka Nobumoto chairman, president & CEO	2,026 fe	1,694 fe	51	2	47	–	Brake friction materials, foundation brake assemblies	96
86	Autoneum (41) 52-244-82-82; autoneum.com	Schlosstalstrasse 43 8406 Winterthur, Switzerland	Martin Hirzel CEO	1,889	1,805	43	44	6	7	Engine covers, hoodliners, outer dashes, water box shields, inner dashes, carpets, floor insulators & mats, floor pans, underbody shields, heatshields, outer tunnel insulators, wheelhouse outer liners, dampers/stiffeners, sealants, acoustic parts	86
87	Freescale Semiconductor Inc. (512) 895-2699; freescale.com	6501 William Cannon Drive W. Austin, TX 78735, USA	Gregg Lowe president & CEO	1,846	1,550 e	39	29	32	–	Semiconductors, microcontrollers, sensor products	–
88	SKF Automotive (46) 31-337-1000; skf.com	Hornsgatan 1 Gothenburg SE-41550, Sweden	Tryggve Sthen president	1,820	1,757	23	50	18	9	Bearings, seals, clutch assemblies, molded rubber products, drive-by-wire systems	75
89	Kautex Textron GmbH (49) 228-488-0; kautex.com	Kautexstr. 52 Bonn D-53229, Germany	Vicente Perez-Lucerga president & CEO	1,814 f	1,845 f	43	41	12	4	Fuel tank systems, clear vision systems, selective catalytic reduction systems, camshafts, packaging	93
90	Alps Electric Co.** (81) 3-3726-1211; alps.com	1-7 Yukigaya-Otsuka-cho, Otaku Tokyo 00145, Japan	Toshihiro Kuriyama president & CEO	1,800 fe	450 f	28	28	28	17	Electric & electro-mechanical components, steering wheel modules, steering wheel & window switches, remote keyless, TPMS, HVAC panels, BCM rearview cameras, touchpad control units, haptic devices	–

e = estimate f = fiscal year fe = fiscal year estimate
**2012 global OEM parts sales reflects North America sales only

*Previously Dow Automotive Systems

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@craim.com

Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Executive	Total global OEM automotive parts sales (dollars in millions) 2013	Total global OEM automotive parts sales (dollars in millions) 2012	Percent North America 2013	Percent Europe 2013	Percent Asia 2013	Percent rest of world 2013	Products	2012 rank
91	F-Tech Inc. (81) 480-85-7236; ftech.co.jp	19 Showanuma Shobumachi, Minami Saitama-gun Saitama Prefecture, 346-0194, Japan	Tsuguo Kimura president	\$1,690 fe	\$1,634 f	55	–	45	–	Chassis, suspension systems, control arms, pedal assemblies, hydroforming	95
92	Dura Automotive Systems (248) 299-7500; duraauto.com	1780 Pond Run Auburn Hills, MI 48326, USA	Lynn Tilton CEO	1,649	1,585	42	48	6	5	Control systems including shifters, park brakes, seat hardware & cable systems; structural systems including lightweight door & body structures; exterior systems	100
93	Georg Fischer Automotive AG (41) 52-631-11-11; gfau.com	Amsler-Laffon-Strasse 9 Schaffhausen 8201, Switzerland	Josef Edbauer president	1,616	1,369	3	87	10	–	Stressable castings	–
94	Michelin Group (33) 4-73-32-2000; michelin.com	23 Place des Carmes Dechaus Clermont-Ferrand 63040, Cedex 9, France	Jean-Dominique Senard CEO	1,600 e	1,573 e	40	35	20	5	Tires	–
95	Omron Corp. (81) 568-78-6181; omronauto.com	6368 Nenryo-zaka, Okusa Komaki-city, Aichi 485-0802, Japan	Katsuhiko Wada Manging Officer, president & CEO	1,468 fe	1,380 fe	25	7	66	2	Electronic control units, keyless entry, switches, closure controls, relays, electronic power steering	–
96	Nissin Kogyo Co. (81) 268-24-3111; nissinkogyo.co.jp	840 Kokubu, Ueda City Nagano Prefecture 386-8505, Japan	Ohkawara Eiji president	1,437 f	1,201 f	26	2	66	6	ABS, VSA, foundation brake systems, aluminum knuckles, aluminum mounts, clutch master & slave cylinders	–
97	Clarion Co. (81) 48-601-3700; clarion.com	7-2 Shintoshin, Chuo-ku, Saitama-shi Saitama 330-0081, Japan	Tatsuhiko Izumi president	1,414 fe	1,531 fe	35	7	58	1	In-vehicle cloud based network, infotainment & navigation systems with smartphone integration, vision & safety systems, multimedia systems & components	–
98	Johnson Electric Group (852) 2663-6688; johnsonelectric.com	6/F, 12 Science Park E. Ave., Hong Kong Science Park, Shatin, NT, Hong Kong, China	Patrick Wang CEO	1,300 f	–	19	58	23	–	Motion subsystems, cooling fan modules, actuators, motors, switches, solenoids	–
99	Kongsberg Automotive Holding ASA (47) 327-70500; kongsbergautomotive.com	N-3601 Kongsberg Kongsberg N-3601, Norway	Hans Peter Havdal president & CEO	1,290 e	1,300 e	35	54	8	3	Gearshift & drivetrain control systems; cable controls, interior components, seat comfort, clutch actuation, rods, couplings, fluid transfer systems	–
100	Sensata Technologies Holding NV (31) 546-879560; sensata.com	Kolthofsingel 8 Almelo 7602 EM, The Netherlands	Martha Sullivan president & CEO	1,214	1,312	26	39	34	1	Pressure & temperature sensors, motor protectors, switches	–

e = estimate f = fiscal year fe = fiscal year estimate

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

INDEX

Aisin Seiki Co.	5	DuPont	68	Johnson Controls Inc.....	8	Omron Corp.	95
Akebono Brake Industry Co.	85	Dura Automotive Systems	92	Johnson Electric Group.....	98	Panasonic Automotive Systems Co.	23
Alpine Electronics Inc.	80	Eberspaecher Gruppe GmbH.....	55	JTEKT Corp.....	17	Plastic Omnium Co.	37
Alps Electric Co.	90	Faurecia	7	Kautex Textron GmbH.....	89	Robert Bosch GmbH.....	1
American Axle & Manufacturing Holdings Inc.....	62	Federal-Mogul Corp.	50	Keihin Corp.	66	Samvardhana Motherson Group	40
Autoliv Inc.	19	Flex-N-Gate Corp.....	46	Koito Manufacturing	44	Schaeffler AG	24
Autoneum.....	86	Freescale Semiconductor Inc.....	87	Kongsberg Automotive Holding ASA	99	Sensata Technologies Holding NV.....	100
BASF SE.....	16	F-Tech Inc.....	91	KSPG AG	59	Showa Corp.	64
Bayer MaterialScience AG	65	Georg Fischer Automotive AG	93	Lear Corp.	10	SKF Automotive	88
Benteler Automobiltechnik GmbH	26	Gestamp Automocion SA	27	Leoni AG	56	Sumitomo Electric Industries	15
BorgWarner Inc.....	32	GKN	30	Leopold Kostal GmbH.....	72	Takata Corp.....	44
Bridgewater Interiors	82	Goodyear Tire & Rubber Co.....	52	Linamar Corp.	70	TI Automotive	63
Brose Fahrzeugteile GmbH	38	Grupo Antolin	57	Magna International Inc.	3	Tokai Rika Co.	49
CalsonicKansei Corp.	21	HELLA KGaA Hueck & Co.	36	Magneti Marelli S.p.A.....	28	Tokai Rubber Industries	77
CIE Automotive SA	75	Hitachi Automotive Systems	20	Mahle GmbH	22	Tower International.....	84
CITIC Dicastal Co.	83	Honeywell	61	Mando Corp.	43	Toyoda Gosei Co.	29
Clarion Co.	97	Hyundai Dymos Inc.	76	Martinrea International Inc.	60	Toyota Boshoku Corp.	18
Continental AG	4	Hyundai Mobis	6	Michelin Group	94	Trelleborg/Vibracoustic	81
Cooper-Standard Automotive	67	Hyundai Powertech Co.	54	Mitsuba Corp.....	73	TRW Automotive Holdings Corp.	11
Cummins Inc.....	25	Hyundai-WIA Corp.....	35	Mitsubishi Electric Corp.....	41	TS Tech Co.	47
Dana Holding Corp.	34	IAC Group	42	Nemak	48	Valeo SA	14
Delphi Automotive	13	Infineon Technologies AG	78	Nexteer Automotive	79	Visteon Corp.	31
Denso Corp.	2	Inteva Products	74	Nissin Kogyo Co.	96	Webasto SE	58
Dow Automotive/Related Businesses	71	Iochepe-Maxion SA	69	NSK	39	Yazaki Corp	12
Draexlmaier Group	53	JATCO	33	NTN Corp.	51	ZF Friedrichshafen AG.....	9

Top 50 European OEM parts suppliers – Ranked by sales of original equipment parts in 2013

2013 Europe rank	2013 global rank	Company	Total Europe OEM automotive parts sales (dollars in millions) 2013	Total Europe OEM automotive parts sales (dollars in millions) 2012	2012 Europe rank	2012 global rank	2013 Europe rank	2013 global rank	Company	Total Europe OEM automotive parts sales (dollars in millions) 2013	Total Europe OEM automotive parts sales (dollars in millions) 2012	2012 Europe rank	2012 global rank
1	1	Robert Bosch GmbH bosch.com	\$21,297 e	\$19,129 e	1	1	26	40	Samvardhana Motherson Group motherson.com	\$2,592 f	\$1,482 f	–	–
2	4	Continental AG continental-corporation.com	16,415 fe	16,400 fe	2	3	27	55	Eberspaecher Gruppe GmbH* eberspaecher.com	2,561 e	2,471 e	26	55
3	3	Magna International Inc. magna.com	14,094	12,171	4	4	28	59	KSPG AG kspg.com	2,353 e	1,705 e	38	79
4	7	Faurecia faurecia.com	12,933	12,600	3	7	29	56	Leoni AG leoni.com	2,300 fe	2,254 fe	29	54
5	9	ZF Friedrichshafen AG zf.com	11,852 f	10,929 f	5	9	30	31	Visteon Corp. visteon.com	2,232	2,195	30	32
6	8	Johnson Controls Inc. johnsoncontrols.com	9,845 f	10,582 fe	6	6	31	5	Aisin Seiki Co. aisin.co.jp	2,224 fe	2,858 fe	20	5
7	16	BASF SE basf.com	7,164	7,637	7	14	32	42	IAC Group iacgroup.com	2,184	2,021	33	45
8	14	Valeo SA valeo.com	6,833 e	6,536 e	8	15	33	61	Honeywell honeywell.com	2,059	1,973	34	60
9	11	TRW Automotive Holdings Corp. trwauto.com	6,620 e	6,010	10	13	34	50	Federal-Mogul Corp. federalmogul.com	2,058 e	2,107 e	31	50
10	10	Lear Corp. lear.com	6,169	5,098	11	11	35	57	Grupo Antolin grupoantolin.com	2,030	2,031 fe	32	56
11	13	Delphi Automotive delphi.com	6,051 e	6,011	9	12	36	34	Dana Holding Corp. dana.com	1,963	1,806	36	26
12	28	Magneti Marelli SpA magnetimarelli.com	4,911 f	4,583 f	13	31	37	58	Webasto SE webasto.com	1,548 f	1,508 f	39	61
13	27	Gestamp Automocion SA gestamp.com	4,755	4,939	12	25	38	17	JTEKT Corp. jtekt.co.jp	1,476 f	1,371 f	42	18
14	24	Schaeffler AG schaeffler.com	4,572 e	4,288 e	19	21	39	93	Georg Fischer Automotive AG gfau.com	1,406	1,177	50	–
15	26	Benteler Automobiltechnik GmbH benteler.com	4,323 e	4,433 e	14	24	40	48	Nemak nemak.com	1,405	1,132	–	52
16	2	Denso Corp. globaldenso.com	4,212 fe	3,762 fe	16	2	41	52	Goodyear Tire & Rubber Co. goodyear.com	1,400 e	1,720 e	37	50
17	22	Mahle GmbH mahle.com	3,998 f	2,762 f	21	30	42	72	Leopold Kostal GmbH kostal.com	1,396	1,341	44	81
18	32	BorgWarner Inc. borgwarner.com	3,570	3,592	17	29	43	63	TI Automotive tiautomotive.com	1,312 e	1,200 e	47	63
19	36	HELLA KGaA Hueck & Co. hella.com	3,551 fe	3,773 f	15	33	44	44	Takata Corp. takata.com	1,307 f	1,405 f	41	44
20	38	Brose Fahrzeugteile GmbH brose.com	3,429	3,351	18	39	45	81	TrelleborgVibracoustic tbvc.com	1,298 e	1,200 e	47	87
21	53	Draexlmaier Group draexlmaier.com	3,284 e	2,559 e	25	64	46	25	Cummins Inc. cummins.com	1,264	1,354 e	43	20
22	37	Plastic Omnium Co. plasticomnium.com	3,084	2,625	24	40	47	75	CIE Automotive SA cieautomotive.com	1,147	1,117	–	83
23	30	GKN gkn.com	2,926	2,446	27	34	48	78	Infineon Technologies AG infineon.com	1,133 e	1,063 e	–	78
24	19	Autoliv Inc. autoliv.com	2,905	2,645	23	22	49	67	Cooper-Standard Automotive cooperstandard.com	1,082 fe	1,008 fe	–	69
25	6	Hyundai Mobis mobis.co.kr	2,640 f	2,391 f	28	8	50	65	Bayer MaterialScience AG materialscience.bayer.com	1,069 e	1,191 e	49	62

e = estimate f = fiscal year fe = fiscal year estimate

*Previously Eberspaecher Holding GmbH

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Safety technology is paving way for self-driving revolution

David Sedgwick
dsedgwick@crain.com

At first glance, it's hard to imagine that Google's self-driving prototype, an egg-shaped car with no steering wheel and a top speed of 25 mph, could force an automotive revolution.

In truth, the driverless revolution is already here. The technological building blocks for Google's vehicle — such as lane guidance, parking assist, blind-spot detection and intelligent cruise control — are spreading rapidly into mass-market vehicles for safety.

The big winners from this trend will be the mega-suppliers with deep pockets to bankroll the necessary R&D.

Key players include Robert Bosch GmbH, Denso Corp., Continental AG, TRW Automotive Holdings Corp. and Delphi Automotive — each of which rank in the top 10 on *Automotive News'* list of the top 100 suppliers to North America.

In January, consulting firm IHS Automotive published a forecast that fully self-driven cars — which are expected to debut around 2025 — will be equipped with anti-collision technology worth \$7,000 to \$10,000 per vehicle in today's dollars.

But suppliers won't have to wait to reap profits. They are selling the technology for safety in mass-market vehicles.

Suppliers are steadily improving hardware components such as radar, cameras, lidar and electronic control units. But the toughest task will be software development, says IHS analyst Egil Juliussen.

"The complexity of the software is such that only a few companies can manage all of it," Juliussen said. Others will "license software components from other players."

In March, for example, Continental launched production of short-range radar



Suppliers are improving radar, cameras and electronic control units for the mass market.

at its plant in Seguin, Texas. The plant will produce 3 million radar sensors — to be used for blind-spot detection and parking assist — in 2016.

Overall, Continental expects its global sales of driver-assistance systems will rise from \$680 million this year to \$2 billion by 2018.

Collision-avoidance technology "is not just for high-end models," said Dean McConnell, Continental's North American director of customer programs for advanced driver-assistance systems. "It's moving into trucks and middle segments. All cars, including affordable cars, are going to have solutions."

Collision avoidance is big business for Bosch as well. The company expects its sales of driver-assistance systems will generate nearly \$1.4 billion in global sales by 2016.

The big seller in the company's product

portfolio is radar; by 2016, the company expects it will have sold 10 million radar sensors worldwide.

Frank Sgambati, marketing director of chassis system controls for Robert Bosch in North America, says collision avoidance has gotten a big boost in Europe, where Euro NCAP rules encourage automakers to adopt safety-assist systems to earn a top crash rating. NCAP stands for New Car Assessment Program.

"We believe consumer education is the key to a lot of these technologies," Sgambati said.

In the United States, NCAP crash ratings include evaluations of forward collision warnings and lane departure warnings.

Mike Thoeny, Delphi Automotive's North American managing director of electronics controls, predicts that the National Highway Traffic Safety Administra-

tion will consider incentives for automakers to adopt anti-collision devices.

In the meantime, suppliers are trying to make the technology more affordable on the assumption that they'll reap big profits from high volume.

For example, Delphi has developed a central control unit that analyzes data from the vehicle's array of radar and camera sensors.

That allows automakers to use smaller, cheaper sensors since they won't require their own control units.

Driven by consumer awareness and tougher crash ratings, automakers are moving quickly to expand their use of collision-avoidance technology, Thoeny noted.

"It's a big point of discussion," he said. Collision-avoidance technology "is at a tipping point right now." **AN**

Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2013	Total North America OEM automotive parts sales (dollars in millions) 2012	Total worldwide OEM automotive parts sales (dollars in millions) 2013	Total worldwide OEM automotive parts sales (dollars in millions) 2012	Products	2012 rank
1	Magna International Inc. (905) 726-2462; magna.com	337 Magna Drive Aurora, Ontario L4G 7K1, Canada	Donald Walker CEO	\$17,531	\$16,127	\$34,375	\$30,428	Body, chassis, interior, exterior, seating, powertrain, electronics, vision, closure & roof systems & modules	1
2	Johnson Controls Inc. (734) 254-5000; johnsoncontrols.com	49200 Halyard Drive Plymouth, MI 48170	Al Bolzenius president, automotive experience	11,017 f	9,231 fe	23,440 f	22,515 f	Seating, overhead systems, door and instrument panels, center & overhead consoles & interior electronics; lead acid and hybrid vehicle batteries	2
3	Continental Automotive Systems U.S. Inc. (248) 393-5300; continental-corporation.com	One Continental Drive Auburn Hills, MI 48326	Samir Salman CEO, Continental, North America	7,705 fe	6,888 fe	33,500 fe	32,800 fe	Electronic brakes, stability management systems, tires, foundation brakes, 3 chassis systems, safety system electronics, telematics, powertrain electronics, interior modules, instrumentation, technical elastomers	3
4	Robert Bosch (248) 876-1000; boschusa.com	38000 Hills Tech Drive Farmington Hills, MI 48331	Mike Mansuetti president	7,233 e	6,254 e	40,183 e	36,787 e	Gasoline systems, diesel systems, chassis systems controls, electrical drives, starter motors & generators, car multimedia, electronics, steering systems, battery technology, exhaust gas turbochargers & treatment systems, service solutions	4
5	Denso International America Inc. (248) 350-7500; densocorp-na.com	24777 Denso Drive, P.O. Box 5133 Southfield, MI 48086	Hikaru Sugi president & CEO	7,077 fe	5,472 fe	35,849 fe	34,200 fe	Thermal, powertrain control, electronic & electric systems; small motors, telecommunications	7
6	Faurecia (248) 409-3500; na.faurecia.com	2800 High Meadow Circle Auburn Hills, MI 48326	Michael Heneka president, Faurecia North America	6,467	6,075	23,950	22,500	Seating, emissions control technologies, interior systems & exteriors	5
7	Lear Corp. (248) 447-1500; lear.com	21557 Telegraph Road Southfield, MI 48033	Matthew Simoncini president & CEO	6,169	5,681	16,234	14,567	Seating & electrical distribution systems	6
8	TRW Automotive Inc. (734) 855-2600; trwauto.com	12025 Tech Center Drive Livonia, MI 48150	John Plant chairman, president & CEO	5,813 e	5,105	16,147	14,141	Steering, suspension, braking & engine components; fasteners, occupant-restraint systems, electronic safety & security systems	8
9	Mobis North America (248) 426-5577; mobis.co.kr	23255 Commerce Drives Farmington Hills, MI 48335	Chung Myung-Chul president & CEO	5,207 f	4,719 f	24,677 f	21,351 f	Chassis, cockpit & front-end modules; ABS, ESC, MDPS, airbags, LED lamps, ASV parts, sensors, electronic control systems, hybrid car powertrains, parts & power control units	11
10	Delphi Automotive Systems (248) 813-2000; delphi.com	5725 Delphi Drive Troy, MI 48098	Rodney O'Neal president & CEO	5,184 e	4,969	15,475	14,432	Mobile electronics; powertrain, safety, thermal, controls & security systems; electrical/electronic architecture; in-car entertainment technologies	9
11	Aisin World Corp. of America (734) 453-5551; aisinworld.com	46501 Commerce Center Drive Plymouth, MI 48170	Masayasu Saito president	4,367 fe	4,121 fe	27,125 fe	30,080 fe	Body, brake & chassis systems, electronics, drivetrain, & engine components	12
12	Flex-N-Gate Corp. (217) 278-2600; flex-n-gate.com	1306 E. University Ave. Urbana, IL 61802	Shahid Khan president & CEO	4,232	3,949	4,650	4,340	Plastic & steel bumpers; fascias, stamping, mechanical assemblies, running boards, prototype sheet metal, interior & exterior plastic, towing hitches, body-in-white stampings, roll forming, lighting	13
13	Cummins Inc. (812) 377-5000; cummins.com	500 Jackson St. Columbus, IN 47201	Tom Linebarger chairman & CEO	4,108	4,783 e	7,900	9,025 e	Diesel & natural gas engines	10
14	Yazaki North America Inc. (734) 983-1000; yazaki-na.com	6801 Haggerty Road Canton, MI 48187	Nigel Thompson president & CEO	3,713 e	3,508 fe	15,600 e	15,801 fe	Wiring harnesses, connectors, junction boxes, power distribution boxes, instrumentation, high voltage systems	15
15	ZF North America Inc. (734) 416-6200; zf.com	15811 Centennial Drive Northville, MI 48168	Julio Caspari president	3,678 f	3,580 f	20,434 f	18,843 f	Transmissions, chassis components & systems, steering systems, clutches, dampers	14
16	Dana Holding Corp. (419) 887-3000; dana.com	3939 Technology Drive Maumee, OH 43537	Roger Wood CEO	2,978	3,106	6,769	7,224	Axles, driveshafts, sealing & thermal management products	16
17	Autoliv North America (248) 475-9000; autoliv.com	1320 Pacific Drive Auburn Hills, MI 48326	Steve Fredin president, The Americas	2,905	2,893	8,803	8,267	Airbags, seat belts, safety electronics, steering wheels	18
18	IAC Group (248) 455-7000; iacgroup.com	28333 Telegraph Road Southfield, MI 48034	James Kamsickas president & CEO	2,808	2,491	5,200	4,700	Instrument panels, consoles, cockpits, doors & trim, flooring, acoustics, headliners & overhead systems, other interior & exterior components	19
19	Sumitomo Electric Wiring Systems Inc. (270) 782-7397; sewsus.com	1018 Ashley St. Bowling Green, KY 42103	Makoto Tani president & CEO, North America	2,769 fe	2,437 fe	12,851 fe	11,389 f	Electrical distribution systems, electronics, connection systems	20
20	Nemak North America (52) 81-8748-5200; nemak.com	Libramiento Arco Vial Km. 6.8 Garcia, NL 66000, Mexico	Napoleon Cantu business unit director, Mexico Operations	2,766	2,263	4,391	3,902	Aluminum cylinder heads, engine blocks, transmission & components	26
21	American Axle & Manufacturing Holdings Inc. (313) 758-2000; aam.com	One Dauch Drive Detroit, MI 48211	David Dauch chairman, president & CEO	2,630	2,403	3,207	2,931	Driveline & drivetrain systems & related components	21
22	Valeo Inc. (248) 619-8300; valeo.com	150 Stephenson Hwy. Troy, MI 48083	Francoise Colpron president, North America	2,597 e	2,179 e	13,666 e	12,816 e	Micro hybrid systems, electrical & electronic systems, thermal systems, transmissions, wiper systems, camera/sensor technology, security systems, interior controls	27

e = estimate f = fiscal year fe = fiscal year estimate

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2013	Total North America OEM automotive parts sales (dollars in millions) 2012	Total worldwide OEM automotive parts sales (dollars in millions) 2013	Total worldwide OEM automotive parts sales (dollars in millions) 2012	Products	2012 rank
23	Martinrea International Inc. (416) 749-0314; martinrea.com	3210 Langstaff Road Vaughan, Ontario L4K 5B2, Canada	Nick Orlando president & CEO	\$2,513 fe	\$2,298 f	\$3,222 f	\$2,901 f	Body, chassis & fluid handling components; assemblies & modules	24
24	GKN Driveline (248) 377-1200; gkndriveline.com	3300 University Drive Auburn Hills, MI 48326	Robert Willig president, Americas	2,476	1,931	7,503	6,438	Driveline halfshafts, driveshafts & AWD; powder metal engine & transmission components; automotive structures & chassis systems	30
25	BASF Corp. (973) 245-6000; basf.com/group/corporate	100 Park Ave. Florham Park, NJ 07932	Hans Engel CEO	2,470	2,370	12,351	13,168	Coatings, catalysts, engineering plastics, polyurethanes, coolants, brake fluids, battery materials	23
26	Benteler Automotive Corp. (248) 377-9999; benteler.com	2650 N. Opdyke Road, Bldg. B Auburn Hills, MI 48326	Thomas Wuensche president & CEO	2,316 e	2,293 e	7,720 e	7,643 e	Chassis & exhaust systems, structural products, engine application components, bumper/impact management, lightweight solutions	48
27	BorgWarner Inc. (248) 754-9200; borgwarner.com	3850 Hamlin Road Auburn Hills, MI 48326	James Verrier president & CEO	2,231	2,083	7,437	7,183	Turbochargers, engine valve-timing systems, ignition systems, emissions systems, thermal systems, transmission-clutch systems, transmission-control systems & torque management systems	28
28	Bridgewater Interiors (313) 842-3300; bridgewater-interiors.com	4617 W. Fort St. Detroit, MI 48209	Ronald Hall Sr. CEO	2,180 f	1,839 f	2,180 f	1,839 f	Seating systems	–
29	CalsonicKansei North America Inc. (931) 680-6415; calsonic.com	One Calsonic Way Shelbyville, TN 37162	Shingo Yamamoto president	2,145 fe	1,562 fe	8,580 fe	7,440 fe	Climate control, engine cooling & exhaust systems; instrument clusters, console boxes, cockpit modules, instrument panels, front-end modules	37
30	Linamar Corp. (519) 836-7550; linamar.com	287 Speedvale Ave. W. Guelph, Ontario N1H 1C5, Canada	Linda Hasenfratz CEO	2,078	1,918	2,630	2,339	Engine camshafts, connecting rods, cylinder heads & blocks, balance shaft assemblies, fuel rails, transmission gears, differentials, clutch modules, shafts & shell assemblies, all-wheel-drive systems	31
31	TK Holdings Inc. (248) 373-8040; takata.com	2500 Takata Drive Auburn Hills, MI 48326	Shunkichi Shimizu chairman & CEO	2,011 f	1,779 f	5,028 f	4,861 f	Airbags, seat belts, electronics, steering wheels, interior trim & textiles	32
32	TS Tech Americas Inc. (614) 575-4100; tstech.co.jp	8458 E. Broad St. Reynoldsburg, OH 43068	Takuo Arai president	1,996 fe	1,710 fe	4,436 f	3,717 f	Seats, interior trim, roof & door liners	42
33	Hitachi Automotive Systems Americas Inc. (859) 734-9451; hitachi.us	955 Warwick Road Harrodsburg, KY 40330	Toru Kamioko president & CEO	1,936 fe	1,660 fe	8,760 fe	8,218 fe	Engine management, electric powertrain, drive control systems	29
34	JTEKT Automotive Group Cos. (734) 454-1500; jtekt.co.jp	47771 Halyard Drive Plymouth, MI 48170	Hiroyuki Kaijima president	1,930 f	1,665 f	11,351 f	9,793 f	Bearings, steering systems, driveline systems & machine tools	35
35	Plastic Omnium Co. (248) 458-0700; plasticomnium.com	2710 Bellingham Road, Ste. 400 Troy, MI 48083	Marc Cornet president, business unit North America	1,928	1,676	6,425	5,585	Fascias, front-end modules, rear-end modules, fenders, body panels, fuel systems	34
36	Mahle Industries Inc. (423) 318-3170; mahle.com	23030 Haggerty Road Farmington Hills, MI 48335	Roland Zitt president	1,871 f	1,629 f	8,506 f	7,081 f	Piston systems, cylinder components, valve train systems, air & liquid management systems, powertrain engineering, vehicle climatization, engine & powertrain cooling	38
37	Goodyear Tire & Rubber Co. (330) 796-2121; goodyear.com	1144 E. Market St. Akron, OH 44316	Steve McClellan president, North American Tire	1,760 e	1,720 e	4,000 e	4,300 e	Tires	33
38	Panasonic Automotive Systems Co. of America (770) 487-3356; panasonic.com/automotive	776 Hwy. 74 S. Peachtree City, GA 30269	Tom Gebhardt president	1,744 fe	–	8,307 f	7,937 f	Audio & video equipment, cameras, premium audio systems, music streaming service, navigation systems, compressors, batteries, motors, monitors, sensors, switches, HUD	–
39	Nexteer Automotive (989) 757-5000; nexteer.com	3900 E. Holland Road Saginaw, MI 48601	Laurent Bresson president & COO	1,697	1,562	2,387	2,200	Electric power steering, hydraulic power steering, steering columns, halfshafts	39
40	Cooper-Standard Automotive (248) 596-5900; cooperstandard.com	39550 Orchard Hill Place Drive Novi, MI 48375	Bill Pumphrey president, North America	1,607 fe	1,498 fe	3,091 fe	2,881 fe	Sealing & trim, fuel and brake delivery, fluid transfer, thermal & emissions & anti-vibration systems, subsystems & modules	41
41	Toyoda Gosei North America Corp. (248) 280-2100; toyodagosei.com	1400 Stephenson Hwy. Troy, MI 48083	Toru Koyama president	1,520 fe	1,296 fe	7,600 fe	7,200 fe	Sealing systems, interior systems, optoelectronics, exterior trim, safety systems, rubber/plastic functionals, fuel systems	46
42	Toyota Boshoku America Inc. (859) 817-4000; toyota-boshoku.com/us	1360 Dolwick Drive, Ste. 125 Erlanger, KY 41018	Shigetoshi Miyoshi chairman & CEO	1,470 fe	1,658 fe	9,482 fe	10,484 fe	Seats, door trim, carpet, headliners, oil & air filters, door panels, fabrics & substrates	36
43	Brose North America Inc. (248) 339-4000; brose.com	3933 Automation Ave. Auburn Hills, MI 48326	Jan Kowal president	1,441	1,271	6,212	5,778	Window regulators, door modules, seat adjusters, closure systems, power closure systems, seat adjusters, power head restraints, electric drives & motors, electronics	47
44	JATCO USA Inc. (248) 306-9200; jatco-usa.com	38700 Country Club Drive, Ste. 100 Farmington Hills, MI 48331	Bill Krueger chairman	1,436 fe	1,086 f	7,005 fe	7,146 f	Automatic transmissions, continuously variable transmissions	52
45	Federal-Mogul Corp. (248) 354-7700; federalmogul.com	26555 Northwestern Hwy. Southfield, MI 48033	Rainer Jueckstock & Daniel Ninivaggi Co-CEOs	1,428 e	1,462 e	4,200 e	4,300 e	Pistons, rings, cylinder liners, piston pins, ignition & spark plugs, bearings, valve seats & guides, gaskets, seals, heat shields, brake friction materials & products, systems protection products, lighting products, wipers, fuel pumps	43

e = estimate f = fiscal year fe = fiscal year estimate

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2013	Total North America OEM automotive parts sales (dollars in millions) 2012	Total worldwide OEM automotive parts sales (dollars in millions) 2013	Total worldwide OEM automotive parts sales (dollars in millions) 2012	Products	2012 rank
46	Visteon Corp. (734) 710-5000; visteon.com	One Village Center Drive Van Buren Township, MI 48111	Timothy Leuliette president & CEO	\$1,413	\$1,235	\$7,439	\$6,860	Climate-control systems, electronics, interiors	49
47	HELLA Corporate Center USA Inc. (734) 414-0900; hellausa.com	43811 Plymouth Oaks Blvd. Plymouth, MI 48170	Steve Lietaert president	1,407 fe	1,171 f	6,700 fe	6,505 f	Electronic and lighting components & systems	50
48	Schaeffler Group USA Inc. (248) 528-9080; schaeffler.us	1750 E. Big Beaver Road Troy, MI 48083	Bruce Warmbold president & CEO	1,306 e	1,225 e	8,165	7,658	Anti-friction bearings, engine components chassis & transmissions, wheel & axle bearings, clutch & transmission systems, dampers	51
49	Powertech America Inc. (706) 902-6800; powertech.co.kr	220 Fort Drive LaGrange, GA 30240	Samho Cha director	1,243 e	943 e	3,885 e	2,858 e	Automatic transmissions	55
50	NTN USA Corp. (847) 298-7500; ntnamerica.com	1600 E. Bishop Court, P.O. Box 7604 Mount Prospect, IL 60056	Pete Eich president	1,121 fe	893 fe	4,102 fe	4,250 fe	Constant velocity joints, axle bearings, needle roller bearings, tapered roller bearings, intelligent in-wheel parts for EVs	45
51	Inteva Products (248) 655-8886; intevaproducts.com	1401 Crooks Road Troy, MI 48084	Lon Offenbacher president & CEO	1,100 f	1,372 f	2,500 f	2,800 f	Closure systems, interior systems; motor, electronic & roof systems	44
52	Gestamp North America (248) 743-3400; gestamp.com	2701 Troy Center Drive, Ste. 150 Troy, MI 48084	Jeff Wilson president, Gestamp North America	1,074	1,064	7,670	7,599	Body-in-white stampings & assemblies, chassis, hinges, power systems	53
53	Akebono Brake Corp. (270) 234-5500; akebonobrakes.com	301 Ring Road Elizabethtown, KY 42701	Kanji Miyajima president & CEO	1,033 fe	893 fe	2,026 fe	1,694 fe	Brake friction materials, foundation brake assemblies	61
54	Grede Holdings (248) 440-9500; grede.com	4000 Town Center, Ste. 500 Southfield, MI 48075	Douglas Grimm chairman, president & CEO	1,000	506	1,000	506	Bearing caps, brake calipers, control arms, steering knuckles, turbocharger housings, power steering pump housings, differential carriers & cases, engine brackets, industrial valve bodies	91
55	Keihin North America Inc. (765) 298-6830; keihin-na.com	2701 Enterprise Drive Anderson, IN 46013	Koki Onuma president	991 fe	665 fe	3,136 fe	2,650 fe	Air & fuel management systems; electronic systems, HVAC systems, electronic management systems	75
56	Tower Automotive Inc. (248) 675-6000; towerinternational.com	17672 N. Laurel Park Drive, Ste. 400 Livonia, MI 48152	Jim Bernard president, North America	967	902	2,102	2,051	Body structures & assemblies, lower vehicle frames & structures, chassis modules & systems, suspension components	59
57	Grupo Antolin North America Inc. (248) 373-1749; grupoantolin.com	1700 Atlantic Blvd. Auburn Hills, MI 48326	Max Rogers regional manager, North America	964	886 fe	3,625	3,465 fe	Overhead systems, door module & panels, window regulators, seat functions, interior & exterior lighting	62
58	Magneti Marelli Holding USA (248) 418-3000; magnetimarelli.com	3900 Automation Ave. Auburn Hills, MI 48326	Stephane Vedio country representative	957 f	743 f	7,665 f	7,073 f	Lighting, powertrain transmissions, electronics, suspension systems, active & passive shock absorbers, exhaust systems, plastic parts	71
59	Mando America Corp. (248) 668-4300; mando.com	29930 Hudson Drive Novi, MI 48377	Kim Chang Ho president	952 f	830 f	5,145 f	4,689 f	Brake, steering & suspension systems & components	65
60	F & P America Mfg. Inc. (937) 339-0212; fandp.com	2101 Corporate Drive Troy, OH 45373	Kenichi Ando president	933 fe	854 f	1,690 fe	1,634 f	Chassis, suspension systems, control arms, pedal assemblies, hydroforming	60
61	Eberspaecher North America Inc. (248) 994-7015; eberspaecher.com	29101 Haggerty Road Novi, MI 48377	Douglas Swick president	928 e	931 e	3,711 e	3,581 e	Silencers, catalytic converters, particulate filters, manifolds, vehicle heaters, electrical vehicle heaters, electronics	57
62	TRAM Inc. (734) 254-8500; tokai-rika.co.jp	47200 Port St. Plymouth, MI 48170	Mikio Kato president	914 fe	817 fe	4,350 fe	4,537 fe	Switches, steering wheels, airbags, shifters, key cylinders & lock sets, interior & lever combination switches; floor transmission shift levers	67
63	ABC Group Inc. (416) 246-1782; abcgroupinc.com	2 Norelco Drive Toronto, Ontario M9L 2X6, Canada	Helga Schmidt president & CEO	900 e	810 e	1,000 e	900 e	Air management systems, fluid management systems, HVAC, fuel systems, interior & exterior systems, flexible products	68
63	DuPont Automotive (800) 441-7515; automotive.dupont.com	950 Stephenson Hwy. Troy, MI 48007	Jeff Sternberg global automotive R&D director	900	930	3,000	3,100	High-performance polymers, elastomers, renewable sourced polymers, fibers & fluoropolymers; battery separator & electronic material technologies, fabricated products, advanced composite materials, specialty chemicals, lubricants, refrigerants, films, bio-based fuels	58
65	Ti Automotive (248) 494-5000; tiautomotive.com	1272 Doris Road Auburn Hills, MI 48326	Bill Kozyra chairman & CEO	832 e	750 e	3,200 e	3,000 e	Fluid storage, carrying & delivery technology	70
66	NSK Americas (734) 913-7500; nskamericas.com	4200 Goss Road, P.O. Box 134007 Ann Arbor, MI 48105	Brian Lindsay president & COO	827 f	643 f	5,905 f	4,596 f	Bearings, hub bearings, steering columns, electric power steering, automatic transmissions products	77
67	Autoneum North America (248) 848-0100; autoneum.com	38555 Hills Tech Drive Farmington Hills, MI 48331	Richard Derr president & CEO	812	758	1,889	1,805	Engine covers, hoodliners, outer dashes, water box shields, inner dashes, non-woven carpets, tufted carpets, floor insulators, floor mats, underbody shields, floor pans, heatshields, outer tunnel insulators, wheelhouse outer liners, dampers/stiffeners, sealants, acoustic parts	64
68	Dow Automotive/Related Businesses* (248) 391-6300; dowautomotive.com	1250 Harmon Road Auburn Hills, MI 48326	Steve Henderson president	806	319	2,600	1,100	Glass bonding adhesives, structural adhesives, epoxy composites, polyurethane foams, acoustic foams, elastomers, fluids	–

e = estimate f = fiscal year fe = fiscal year estimate

*Previously Dow Automotive Systems

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2013	Total North America OEM automotive parts sales (dollars in millions) 2012	Total worldwide OEM automotive parts sales (dollars in millions) 2013	Total worldwide OEM automotive parts sales (dollars in millions) 2012	Products	2012 rank
69	Superior Industries International Inc. (818) 902-2700; supind.com	7800 Woodley Ave. Van Nuys, CA 91406	Donald Stebbins president & CEO	\$790	\$822 fe	\$790	\$822 fe	Aluminum wheels	66
70	Kautex Textron North America (248) 616-5100; kautex.com	750 Stephenson Hwy. Troy, MI 48083	Ken Johns vp, Operations North America	780 f	756 f	1,814 f	1,845 f	Fuel tank systems, clear vision systems, selective catalytic reduction systems, camshafts, packaging	69
71	Van-Rob Inc. (905) 727-8585; van-rob.com	200 Vandorf Sideroad Aurora, Ontario L4G 0A2, Canada	Dennis Berry CEO	745 e	640 e	745 e	640 e	Instrument panel beams, engine cradles, bulkhead assemblies, underbody modular, assemblies to body in white, bumper systems	79
72	Alpine Electronics of America Inc. (310) 326-8000; alpine-usa.com	19145 Gramercy Place Torrance, CA 90501	Isao Nagasaki president	736 fe	858 fe	2,300 fe	2,600 fe	Navigation, telematics, drive assist, sound & video systems	63
73	American Showa Inc. (740) 965-1133; amshowa.com	707 W. Cherry St. Sunbury, OH 43074	Koichi Hata president	729 fe	661 fe	3,171 fe	2,964 fe	Shock absorbers, power steering gearboxes & pumps, propeller shafts, gas springs	76
74	Freescale Semiconductor Inc. (512) 895-2699; freescale.com	6501 William Cannon Drive W. Austin, TX 78735	Gregg Lowe president & CEO	720 e	574 e	1,846	1,550 e	Semiconductors, microcontrollers, sensor products	84
75	Shiloh Industries Inc. (330) 558-2600; shiloh.com	880 Steel Drive Valley City, OH 44280	Ramzi Hermiz president & CEO	700 f	586 f	700 f	586 f	Engineered welded blanks, structural components & assemblies	81
76	Dura Automotive Systems (248) 299-7500; duraauto.com	1780 Pond Run Auburn Hills, MI 48326	Lynn Tilton CEO	693	571	1,649	1,585	Control systems including shifters, park brakes, seat hardware & cable systems; structural systems including lightweight door & body structures; exterior systems & trims	83
76	Maxion Wheels (734) 737-5000; maxionwheels.com	39500 Orchard Hill Place, Ste. 500 Novi, MI 48375	Fred Bentley CEO	683 f	698 f	2,845 f	2,921 f	Wheels, structural components	73
78	North American Lighting (217) 465-6600; nal.com	2277 S. Main St. Paris, IL 61944	Greg Conrad president & COO	669 f	493 f	5,028 f	5,243 f	Exterior lighting	94
79	AEEES (248) 489-4900; aeesinc.com	36555 Corporate Drive, Ste. 300 Farmington Hills, MI 48331	Frank Sovis president, North America	668 fe	724 fe	1,193 f	1,207 f	Wiring harnesses, electrical distribution centers, connectors, terminals, electronics	72
80	Michelin North America Inc. (864) 458-5000; michelin.com	One Parkway S. Greenville, SC 29615	Pete Selleck president & chairman	640 e	568 e	1,600 e	1,573 e	Tires	85
81	Webasto Roof Systems Inc. (248) 997-5100; webasto.com	1757 Northfield Drive Rochester Hills, MI 48309	Andre Schoenekaes president & CEO	626 f	585 f	3,294 f	3,077 f	Sunroofs, panorama roof systems, convertible roof systems, vehicle pre-heating systems	82
82	Metaldyne (734) 207-6200; metaldyne.com	47659 Halyard Drive Plymouth, MI 48170	Thomas Amato president & CEO	611 e	551 e	1,112 e	1,060 e	Precision-engineered solutions for engine, transmission & driveline applications, powder forged connecting rods, balance shaft systems, rubber & viscous crankshaft dampers, powder metal components, transmission modules, differential gears & assemblies, cold & warm forged components	88
83	American Mitsuba Corp. (989) 773-0377; americanmitsuba.com	2945 Three Leaves Drive Mount Pleasant, MI 48858	Yoshimasa Kimura president & CEO	606 fe	494 fe	2,526 fe	2,470 fe	Wiper systems, power window motors, starter motors, fan motors seat motors, sunroof motors, power slide door assemblies, power tailgate systems	93
84	CIE Automotive USA Inc. (734) 793-5320; cieautomotive.com	15030 23 Mile Road Shleby Township, MI 48315	Mikel Orbegozo commercial director, America	586	460	2,440	2,190	Engine & powertrain components, chassis & steering components, exterior & interior trim, roof systems components	99
85	Sanluis Rassini S.A. de C.V. (734) 454-4904; sanluisrassini.com	14500 Beck Road Plymouth, MI 48170	Norman Jacobs president	574 f	488 f	809 f	714 f	Leaf springs, parabolic springs, coil springs, braking systems components	97
85	SRG Global Inc. (586) 757-7800; srgglobal.com	23751 Amber Ave. Warren, MI 48089	Dave Prater president & CEO	574 e	563 e	775 e	750 e	Grilles, emblems & nameplates, exterior & interior decorative trim components, active grille systems, radar covers, extrusion & metal stamping components	86
87	Bayer MaterialScience (412) 777-2000; materialscience.bayer.com	100 Bayer Road Pittsburgh, PA 15205	Gerald MacCleary president	566 e	641 e	3,145 e	3,053 e	Polycarbonates, polyurethanes, adhesives, sealants & raw materials for coatings	78
88	Multimatic Inc. (905) 470-9149; multimatic.com	85 Valleywood Drive Markham, Ontario L3R 5E5, Canada	Peter Czapka president & CEO	560 e	527 e	700 e	650 e	Hinge systems, stamped welded assemblies, suspension systems & engineering services	90
89	CITIC Dicastal Co. (86) 335-5358549; dicastal.com	No.185 Longhai Road Qinhuangdao, Hebei 066011, China	Zuo Xu general manager	523 f	426 f	2,107 f	1,881 f	Aluminum alloy wheels, aluminum casting parts	–
90	Leoni Wiring Systems Inc. (520) 741-0895; leoni.com	2861 N. Flowing Wells Road Tucson, AZ 85705	Martin Gloesslein CEO, Leoni Business Area NAFTA	519 fe	493 fe	3,710 fe	3,600 fe	Wires & strands, optical fibers, cables, cable systems, wiring systems, fuse & relay boxes, special connectors	94
91	Honeywell (734) 392-5500; honeywell.com	47548 Halyard Drive Plymouth, MI 48170	Tony Schultz vp Americas, Honeywell Turbo Technologies	515	493	3,217	3,083	Turbochargers, friction materials & brake systems	94

e = estimate f = fiscal year fe = fiscal year estimate

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpiipen@crain.com

Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2013

2013 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2013	Total North America OEM automotive parts sales (dollars in millions) 2012	Total worldwide OEM automotive parts sales (dollars in millions) 2013	Total worldwide OEM automotive parts sales (dollars in millions) 2012	Products	2012 rank
92	TrelleborgVibracoustic (269) 637-2116; tbvc.com	400 Aylworth Ave. South Haven, MI 49090	Dennis Thornton president, North America	\$506 e	\$400 e	\$2,200 e	\$2,000 e	Engine mounts, chassis mounts, chassis bushings, exhaust mounts, MCU spring carrier, bumpers, torsional vibration dampers, air springs & tuned mass dampers	–
93	Alps Electric North America Inc.* (248) 391-9950; alps.com	1500 Atlantic Blvd. Auburn Hills, MI 48326	Dave (Hiroyuki) Sato president	500 fe	450 f	1,800 fe	450 f	Electric & electro-mechanical components, steering wheel module, steering wheel & window switches, remote keyless, TPMS, HVAC panel, BCM, rear view cameras, touchpad control units, haptic devices	100
94	Clarion Corp. of America (310) 327-9100; clarion.com/us	6200 Gateway Drive Cypress, CA 90630	Paul Lachner president	495 fe	597 fe	1,414 fe	1,531 fe	In-vehicle cloud based network, infotainment & navigation systems with smartphone integration, vision & safety systems, multimedia systems & components	80
95	DTR Industries Inc. (419) 358-2121; dtroh.com	320 Snider Road Bluffton, OH 45817	Akira Kikuta president	494 fe	369 fe	2,431 fe	1,941 fe	Anti-vibration molded rubber, fuel delivery systems	–
96	DAA Draexlmaier Automotive of America (864) 433-8910; draexlmaier.com	1751 E. Main St. Duncan, SC 29334	Stefan Bude CFO & senior vp	469 e	331 e	3,910 e	3,010	Electrical systems, electrical & electronic components, interior systems & functionally integrated modules, cockpit assemblies	–
97	Key Safety Systems Inc. (586) 726-3800; keysafetyinc.com	7000 19 Mile Road Sterling Heights, MI 48314	Jason Luo president & CEO	455 e	351 e	1,167 e	1,032 e	Inflaters, airbags, seat belts, steering wheels, electronics	–
98	Kongsberg Automotive (248) 468-1300; kongsbergautomotive.com	27275 Haggerty Road Novi, MI 48377	Scott Paquette executive vp, Interior	452 e	468	1,290 e	1,300 e	Gearshift & drivetrain control systems; cable controls, interior components, seat comfort, clutch actuation, rods, couplings, fluid transfer systems	–
99	Henniges Automotive (248) 340-4100; hennigesautomotive.com	2750 High Meadow Circle Auburn Hills, MI 48326	Douglas DelGrosso CEO	450	409	775	681	Weather seals, anti-vibration products	–
100	Mitsubishi Electric Automotive America Inc.** (513) 398-2220; meaa-mea.com	4773 Bethany Road Mason, OH 45040	Nobuyuki Nakagaki president & CEO	438 fe	492 fe	5,344 fe	6,000 fe	Engine management, ignitions, audio & navigation systems; alternators & starter motors	–

INDEX

ABC Group Inc.	63	Dana Holding Corp.	16	Johnson Controls Inc.	2	Panasonic Automotive Systems Co. of America	38
AEES	79	Delphi Automotive Systems	10	JTEKT Automotive Group Cos.	34	Plastic Omnium Co.	35
Aisin World Corp. of America	11	Denso International America Inc.	5	Kautex Textron North America	70	Powertech America Inc.	49
Akebono Brake Corp.	53	Dow Automotive/Related Businesses	68	Keihin North America Inc.	55	Robert Bosch	4
Alpine Electronics of America Inc.	72	DTR Industries Inc.	95	Key Safety Systems Inc.	97	Sanluis Rassini S.A. DE C.V.	85
Alps Electric North America Inc.	93	DuPont Automotive	63	Kongsberg Automotive	98	Schaeffler Group USA Inc.	48
American Axle & Manufacturing Holdings Inc.	21	Dura Automotive Systems	76	Lear Corp.	7	Shiloh Industries Inc.	75
American Mitsuba Corp.	83	Eberspaecher North America Inc.	61	Leoni Wiring Systems Inc.	90	SRG Global Inc.	85
American Showa Inc.	73	F & P America Mfg. Inc.	60	Linamar Corp.	30	Sumitomo Electric Wiring Systems Inc.	19
Autoliv North America	17	Faurecia	6	Magna International Inc.	1	Superior Industries International Inc.	69
Autoneum North America	67	Federal-Mogul Corp.	45	Magneti Marelli Holding USA	58	TI Automotive	65
BASF Corp.	25	Flex-N-Gate Corp.	12	Mahle Industries Inc.	36	TK Holdings Inc.	31
Bayer MaterialScience	87	Freescale Semiconductor Inc.	74	Mando America Corp.	59	Tower Automotive Inc.	56
Benteler Automotive Corp.	26	Gestamp North America	52	Martinrea International Inc.	23	Toyota Gosei North America Corp.	41
BorgWarner Inc.	27	GKN Driveline	24	Maxion Wheels	76	Toyota Boshoku America Inc.	42
Bridgewater Interiors	28	Goodyear Tire & Rubber Co.	37	Metaldyne	82	TRAM Inc.	62
Brose North America Inc.	43	Grede Holdings	54	Michelin North America Inc.	80	TrelleborgVibracoustic	92
CalsonicKansei North America Inc.	29	Grupo Antolin North America Inc.	57	Mitsubishi Electric Automotive America Inc.	100	TRW Automotive Inc.	8
CIE Automotive USA Inc.	84	HELLA Corporate Center USA Inc.	47	Mobis North America	9	TS Tech Americas Inc.	32
CITIC Dicastal Co.	89	Henniges Automotive	99	Multimatic Inc.	88	Valeo Inc.	22
Clarion Corp. of America	94	Hitachi Automotive Systems Americas Inc.	33	Nemak North America	20	Van-Rob Inc.	71
Continental Automotive Systems U.S. Inc.	3	Honeywell	91	Nexteer Automotive	39	Visteon Corp.	46
Cooper-Standard Automotive	40	IAC Group	18	North American Lighting	78	Webasto Roof Systems Inc.	81
Cummins Inc.	13	Inteva Products	51	NSK Americas	66	Yazaki North America Inc.	14
DAA Draexlmaier Automotive of America	96	JATCO USA Inc.	44	NTN USA Corp.	50	ZF North America Inc.	15

e = estimate f = fiscal year fe = fiscal year estimate *2012 worldwide OEM parts sales reflects North America sales only

**Mitsubishi Electric Automotive America Inc. 2012 North America OEM parts sales were adjusted

To be considered for the list, please contact the Automotive News Data Center at (313) 446-6000 or e-mail: cpippen@crain.com

Insights that put you in the fast lane

Knowledge drives informed decisions. That's why automotive executives are looking for insight into today's complex issues and industry shifts. And that is why we provide perspectives on issues such as global automotive market conditions and trends, automotive innovation strategies, game-changing operational strategies, as well as the latest on automotive supply chain, manufacturing and strategic sourcing trends and practices. To gain additional insight, visit www.pwc.com/auto.

To see our latest automotive publications, please scan below.

