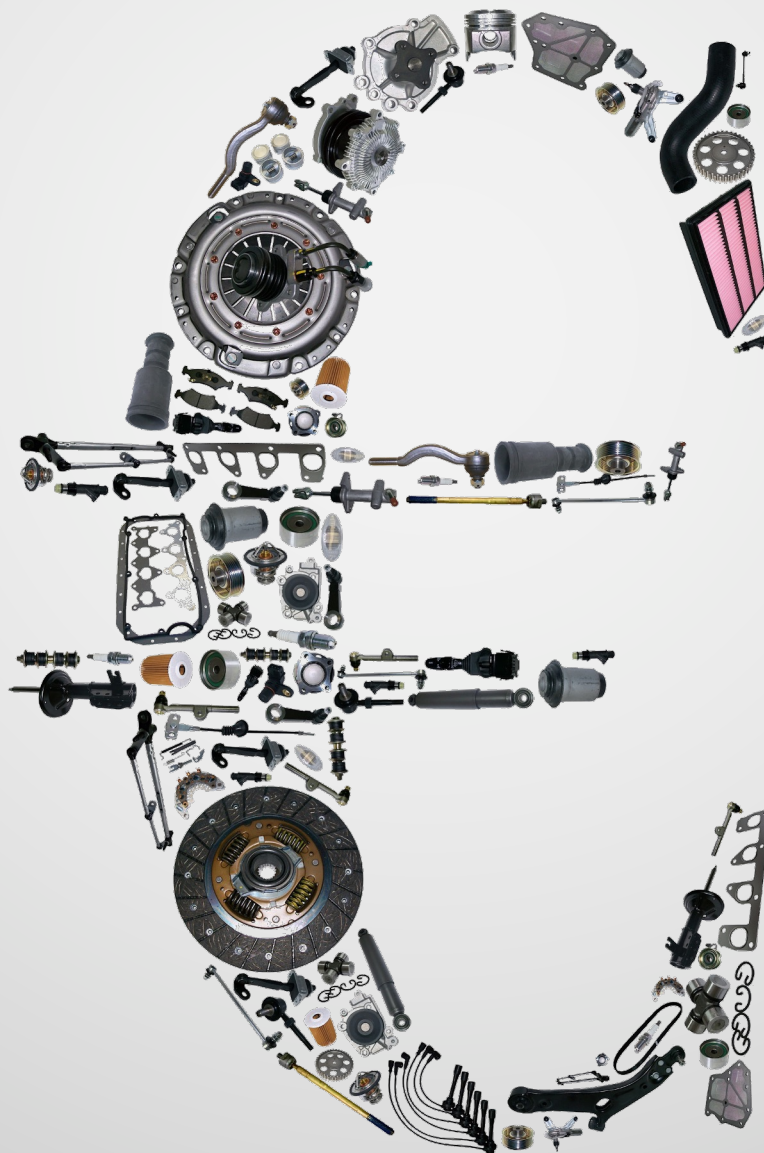


**TOP**  
**100**

# Automotive Supplier in Germany 2021



## Top 100 Automotive Supplier in Germany (1-50)

| Company  |                       | Revenue (mn. EUR) |        |        |                     |                     | EBIT (mn. EUR) |        |       |                      |                      | Product segments |          |            |         |             |            |         |
|--|-----------------------|-------------------|--------|--------|---------------------|---------------------|----------------|--------|-------|----------------------|----------------------|------------------|----------|------------|---------|-------------|------------|---------|
| Name   | City                  | 2020              | 2019   | 2018   | Growth 19-20 (in %) | Growth 18-19 (in %) | 2020           | 2019   | 2018  | Change 19-20 (mn. €) | Change 18-19 (mn. €) | Interior         | Exterior | Powertrain | Chassis | Electronics | E-Mobility | C-Parts |
| Robert Bosch GmbH                                  | Gerlingen             | 42.100            | 46.785 | 47.576 | -10,0               | -1,7                | -654           | 756    | 3.531 | -1.410               | -2.775               |                  |          |            |         | X           | X          |         |
| ZF Friedrichshafen AG                              | Friedrichshafen       | 32.611            | 36.518 | 36.929 | -10,7               | -1,1                | 1.047          | 1.503  | 1.528 | -456                 | -25                  | X                |          | X          |         | X           | X          |         |
| Continental AG (without Powertrain Division)       | Hannover              | 15.317            | 18.905 | 19.295 | -19,0               | -2,0                | -1.441         | -1.446 | 1.771 | 5                    | -3.216               | X                |          | X          | X       | X           |            |         |
| Mahle GmbH   | Stuttgart             | 9.774             | 12.049 | 12.581 | -18,9               | -4,2                | -192           | 96     | 773   | -288                 | -677                 |                  |          | X          |         |             | X          | X       |
| Schaeffler AG                                      | Herzogenaurach        | 9.462             | 10.892 | 10.856 | -13,1               | 0,3                 | -101           | 576    | 1.001 | -677                 | -425                 |                  |          | X          | X       |             | X          |         |
| Vitesco Technologies GmbH (Continental Powertrain) | Regensburg            | 8.028             | 9.093  | 7.741  | -11,7               | 17,5                | -324           | -635   | 120   | 311                  | -755                 |                  |          | X          |         |             | X          |         |
| Hella KGaA Hueck & Co.                             | Lippstadt             | 5.829             | 6.990  | 7.060  | -16,6               | -1,0                | -343           | 808    | 574   | -1.151               | 234                  |                  |          |            |         | X           | X          |         |
| Brose Fahrzeugteile GmbH & Co.                     | Coburg                | 5.122             | 6.170  | 6.263  | -17,0               | -1,5                | -              | -      | -     | -                    | -                    |                  |          |            |         | X           |            |         |
| Eberspächer Gruppe GmbH & Co. KG                   | Esslingen             | 4.912             | 4.957  | 4.610  | -0,9                | 7,5                 | 34             | 136    | 102   | -102                 | 34                   |                  |          | X          |         | X           |            |         |
| ThyssenKrupp AG                                    | Essen                 | 4.702             | 5.407  | 6.610  | -13,0               | -18,2               | -1.157         | -126   | 105   | -1.031               | -231                 |                  | X        |            |         |             | X          |         |
| Fritz Dräxlmaier GmbH & Co. KG                     | Vilsbiburg            | 4.200             | 4.913  | 4.551  | -14,5               | 8,0                 | -              | 232    | 121   | -                    | 111                  | X                |          |            |         | X           | X          |         |
| Voestalpine AG                                     | Dettingen an der Erms | 4.197             | 4.611  | 4.385  | -9,0                | 5,1                 | -29            | 265    | 401   | -294                 | -136                 |                  |          |            |         |             | X          |         |
| Mann + Hummel Holding GmbH                         | Ludwigsburg           | 3.455             | 3.792  | 3.560  | -8,9                | 6,5                 | 165            | 153    | 94    | 12                   | 59                   |                  |          |            |         |             | X          | X       |
| Leoni AG   | Nürnberg              | 3.307             | 3.974  | 4.234  | -16,8               | -6,1                | -280           | -384   | 144   | 104                  | -528                 |                  |          |            |         | X           | X          | X       |
| Infineon Technologies AG                           | Neuburg               | 3.303             | 3.748  | 3.284  | -11,9               | 14,1                | 155            | 404    | 466   | -249                 | -62                  |                  |          |            |         | X           |            |         |
| Webasto SE   | Stockdorf             | 3.300             | 3.748  | 3.433  | -11,9               | 9,2                 | -69            | 107    | 202   | -176                 | -95                  |                  | X        |            |         | X           | X          |         |
| Valeo Deutschland                                  | Bietigheim-Bissingen  | -                 | 2.755  | 2.000  | -                   | 37,8                | -              | -      | -     | -                    | -                    |                  |          | X          |         | X           |            |         |
| BorgWarner Europe GmbH                             | Ketsch                | -                 | 2.677  | 3.093  | -                   | -13,5               | -              | -      | 179   | -                    | -                    |                  |          | X          |         |             | X          |         |
| Rheinmetall Automotive AG (KSPG)                   | Neckarsulm            | 2.151             | 2.736  | 2.930  | -21,4               | -6,6                | 33             | 184    | 262   | -151                 | -78                  |                  |          | X          |         | X           | X          |         |
| AUNDE Group SE                                     | Mönchengladbach       | -                 | 2.099  | 1.951  | -                   | 7,6                 | -              | 53     | 23    | -                    | 30                   | X                |          |            |         |             |            | X       |
| Lear Corporation GmbH                              | Ginsheim              | -                 | 2.047  | 2.314  | -                   | -11,6               | -              | -51    | -29   | -                    | -22                  | X                |          |            |         | X           |            | X       |
| Magna PT B.V. & Co. KG (former Getrag)             | Untergruppenbach      | 2.038             | 1.981  | 1.381  | 2,9                 | 43,5                | 127            | 140    | 36    | -13                  | 104                  |                  |          | X          |         |             |            |         |
| HBPO Beteiligungsgesellschaft mbH                  | Lippstadt             | 1.934             | 2.096  | 1.972  | -7,7                | 6,3                 | 26             | 69     | 66    | -43                  | 2                    |                  | X        |            |         |             |            |         |
| Adient Germany Ltd. & Co. KG                       | Burscheid             | 1.900             | 2.517  | 2.574  | -24,5               | -2,2                | -9             | 119    | 109   | -128                 | 10                   | X                |          |            |         |             |            |         |
| Faurecia Automotive GmbH                           | Stadthagen            | -                 | 1.827  | 1.959  | -                   | -6,7                | -              | 28     | -2    | -                    | 30                   | X                |          | X          |         |             | X          |         |
| Friedrich Boysen GmbH & Co. KG                     | Altensteig            | -                 | 1.824  | 1.918  | -                   | -4,9                | -              | 63     | 61    | -                    | 2                    |                  |          | X          |         |             |            |         |
| Vibracoustic AG                                    | Darmstadt             | 1.799             | 2.142  | 2.147  | -16,0               | -0,3                | 136            | 186    | 174   | -49                  | 12                   |                  |          |            |         |             | X          | X       |
| Freudenberg SE (without Vibracoustic AG)           | Weinheim              | 1.737             | 2.024  | 2.013  | -14,2               | 0,6                 | 534            | 635    | 736   | -101                 | -102                 |                  |          |            |         |             | X          | X       |
| Adolf Würth GmbH & Co. KG - Division Auto          | Bad Mergentheim       | 1.660             | 1.745  | 1.687  | -4,9                | 3,4                 | -              | -      | -     | -                    | -                    |                  |          |            |         |             |            | X       |
| Osram GmbH   | München               | 1.588             | 1.776  | 1.920  | -10,6               | -7,5                | 33             | 117    | 197   | -84                  | -80                  |                  |          |            |         | X           |            |         |
| Muhr und Bender KG (Mubea)                         | Attendorn             | 1.581             | 2.330  | 2.218  | -32,2               | 5,1                 | -              | -      | -     | -                    | -                    |                  |          |            | X       |             |            | X       |
| Adler Pelzer Group                                 | Hagen                 | -                 | 1.514  | 1.587  | -                   | -4,6                | -              | 48     | 59    | -                    | -11                  | X                | X        | X          |         |             |            |         |
| Aptiv Services Deutschland GmbH (former Delphi)    | Wuppertal             | -                 | 1.402  | 1.386  | -                   | 1,2                 | -              | -90    | -124  | -                    | 35                   |                  |          |            |         |             | X          |         |
| Benteler Automobiltechnik GmbH                     | Paderborn             | -                 | 1.382  | 1.390  | -                   | -0,6                | -              | -104   | -76   | -                    | -28                  |                  | X        | X          | X       |             | X          |         |
| ElringKlinger AG                                   | Dettingen/Erms        | 1.368             | 1.596  | 1.567  | -14,3               | 1,9                 | 15             | 36     | 76    | -20                  | -40                  |                  |          | X          |         |             | X          | X       |
| Federal-Mogul Holding Deutschland GmbH             | Wiesbaden             | -                 | 1.269  | 1.336  | -                   | -5,0                | -              | -43    | 6     | -                    | -49                  |                  |          | X          |         |             |            |         |
| Kirchhoff Automotive GmbH                          | Iserlohn              | 1.250             | 1.590  | 1.547  | -21,4               | 2,8                 | -              | 57     | 68    | -                    | -11                  |                  | X        |            |         |             |            |         |
| SMP Deutschland GmbH                               | Bötzingen             | 1.238             | 1.218  | 1.288  | 1,7                 | -5,4                | 25             | 65     | 73    | -40                  | -8                   | X                | X        |            |         |             |            |         |
| Grammer AG - Automotive Division                   | Amberg                | 1.219             | 1.480  | 1.313  | -17,6               | 12,7                | -62            | 51     | 38    | -113                 | 13                   | X                |          |            |         |             |            |         |
| Diehl Stiftung & Co. KG                            | Röthenbach/ Pegnitz   | 1.209             | 1.283  | 1.446  | -5,8                | -11,3               | -              | -      | -     | -                    | -                    |                  | X        | X          | X       | X           | X          |         |
| Preh GmbH  | Bad Neustadt/ Saale   | 1.194             | 1.509  | 1.319  | -20,9               | 14,4                | 19             | 64     | 45    | -45                  | 19                   |                  |          |            |         | X           | X          |         |
| Röchling SE & Co.KG                                | Mannheim              | 1.076             | 1.336  | 1.232  | -19,5               | 8,4                 | 31             | 115    | 136   | -85                  | -21                  |                  | X        | X          |         |             | X          |         |
| Harman Becker Automotive Systems GmbH              | Karlsbad              | -                 | 1.060  | 1.287  | -                   | -17,7               | -              | -76    | -119  | -                    | 43                   |                  |          |            |         | X           |            |         |
| Hirschvogel Holding GmbH                           | Denklingen            | 1.040             | 1.234  | 1.254  | -15,7               | -1,6                | -              | 83     | 41    | -                    | 43                   |                  |          | X          | X       |             | X          |         |
| Sitech Sitztechnik GmbH                            | Wolfsburg             | -                 | 1.036  | 1.089  | -                   | -4,9                | -              | 2      | 11    | -                    | -9                   | X                |          |            |         |             |            |         |
| Tenneco Deutschland                                | Edenkoben             | -                 | 1.010  | 1.139  | -                   | -11,3               | -              | 35     | 32    | -                    | 3                    |                  |          | X          |         |             |            |         |
| Huf Hülsbeck & Fürst GmbH & Co. KG                 | Velbert               | 1.000             | 1.014  | 1.196  | -1,4                | -15,2               | -              | -98    | 17    | -                    | -115                 |                  |          |            |         | X           |            |         |
| Marquardt GmbH                                     | Rietheim-Weilheim     | -                 | 999    | 986    | -                   | 1,2                 | -              | -10    | -7    | -                    | -3                   |                  |          |            |         | X           | X          | X       |
| Rehau AG + Co                                      | Rehau                 | -                 | 988    | 1.060  | -                   | -6,8                | -              | -87    | 0     | -                    | -87                  |                  | X        |            |         |             |            |         |
| Nemak Deutschland *                                | Dillingen/ Saar       | 960               | 1.067  | 1.191  | -10,0               | -10,4               | -              | 19     | 33    | -                    | -14                  |                  | X        | X          |         |             |            |         |

## Top 100 Automobilzulieferer in Deutschland (51-100)

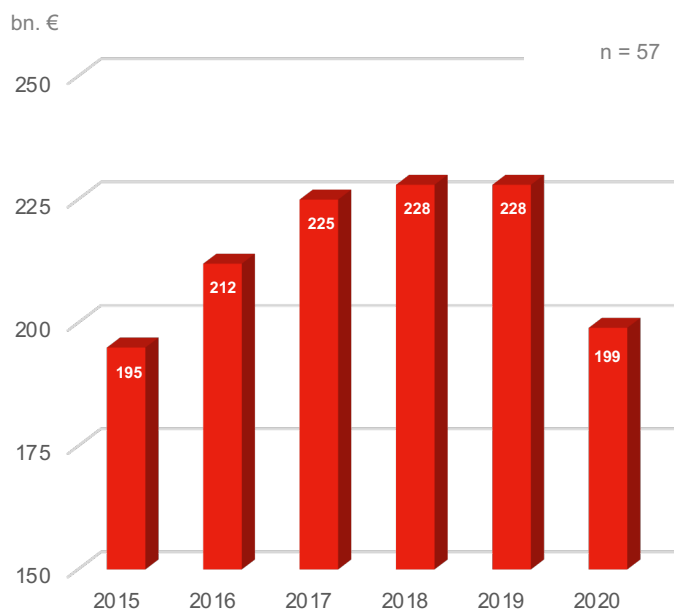
| Company   |                      | Revenue (mn. EUR) |       |       |                     |                     | EBIT (mn. EUR) |      |      |                      |                      | Product segments |          |            |         |             |            |         |
|---|----------------------|-------------------|-------|-------|---------------------|---------------------|----------------|------|------|----------------------|----------------------|------------------|----------|------------|---------|-------------|------------|---------|
| Name  | City                 | 2020              | 2019  | 2018  | Growth 19-20 (in %) | Growth 18-19 (in %) | 2020           | 2019 | 2018 | Change 19-20 (mn. €) | Change 18-19 (mn. €) | Interior         | Exterior | Powertrain | Chassis | Electronics | E-Mobility | C-Parts |
| Yanfeng Germany Automotive Interior Systems Ltd.      | Neuss                | -                 | -     | 898   | -                   | -                   | -              | -    | 3    | -                    | X                    |                  |          |            | X       |             |            |         |
| Kostal Automobil Elektrik GmbH & Co. KG               | Lüdenscheid          | -                 | 867   | 861   | -                   | 0,6                 | -              | -27  | -23  | -                    | -4                   |                  |          |            | X       |             |            |         |
| GKN Driveline **                                      | Offenbach a.M.       | -                 | 865   | 889   | -                   | -2,7                | -              | 65   | -77  | -                    | 142                  |                  |          | X          |         | X           |            |         |
| Borgers SE & Co.KGaA                                  | Bocholt              | -                 | 856   | 901   | -                   | -5,1                | -              | -19  | -58  | -                    | 40                   | X                | X        |            |         |             |            |         |
| Marelli Automotive Lighting (Brotterode & Reutlingen) | Reutlingen           | 839               | 1.148 | 1.104 | -26,9               | 4,0                 | -150           | -49  | 16   | -101                 | -65                  |                  |          |            | X       |             |            |         |
| BOS GmbH & Co. KG                                     | Ostfildern           | -                 | 837   | 825   | -                   | 1,4                 | -              | -    | -    | -                    | -                    | X                |          | X          |         |             |            |         |
| Edscha Holding GmbH                                   | Remscheid            | 827               | 1.000 | 1.027 | -17,3               | -2,6                | -              | -    | -    | -                    | -                    |                  | X        |            | X       |             |            |         |
| Panasonic Automotive Systems Europe GmbH              | Langen               | 779               | 719   | 769   | 8,4                 | -6,5                | -304           | -178 | 8    | -126                 | -186                 |                  |          |            | X       |             |            |         |
| SAS Autosystemtechnik GmbH & Co. KG                   | Karlsruhe            | -                 | 739   | 633   | -                   | 16,6                | -              | 58   | 65   | -                    | -7                   | X                |          |            |         |             |            |         |
| Autoliv B.V. & Co. KG                                 | Elmshorn             | -                 | 723   | 824   | -                   | -12,2               | -              | 4    | -171 | -                    | 175                  | X                |          |            |         | X           |            |         |
| Joyson Safety Systems Germany GmbH                    | Aschaffenburg        | -                 | 697   | 555   | -                   | 25,6                | -              | -159 | -100 | -                    | -59                  | X                |          |            |         | X           |            |         |
| CRRC New Material Technologies (former Boge)          | Damme                | 671               | 795   | 836   | -15,6               | -4,9                | -              | -49  | -62  | -                    | 13                   | X                |          | X          | X       |             |            |         |
| Witte Automotive GmbH                                 | Velbert              | -                 | 659   | 655   | -                   | 0,6                 | -              | 18   | 17   | -                    | 0                    | X                |          |            |         | X           |            |         |
| TE Connectivity Germany GmbH                          | Bensheim             | -                 | 649   | 948   | -                   | -31,5               | -              | 123  | 192  | -                    | -69                  |                  |          |            | X       | X           |            |         |
| Novem Car Interior Design GmbH                        | Vorbach              | 646               | 709   | 646   | -9,0                | 9,8                 | 1              | 113  | 118  | -112                 | -5                   | X                |          |            |         |             |            |         |
| Fritz Winter Eisengießerei GmbH & Co. KG              | Stadtallendorf       | 631               | 666   | 699   | -5,2                | -4,8                | -              | -    | 21   | -                    | -                    |                  |          | X          | X       |             |            |         |
| Kiekert AG  | Heiligenhaus         | 630               | 851   | 825   | -26,0               | 3,2                 | -              | 39   | 38   | -                    | 0                    |                  |          |            |         | X           |            |         |
| Handmann Beteiligungen GmbH                           | Biberach an der Riß  | -                 | 607   | 635   | -                   | -4,4                | -              | 37   | 49   | -                    | -12                  |                  | X        | X          |         |             | X          |         |
| KAMAX GmbH & Co. KG                                   | Homburg (Ohm)        | 605               | 774   | 787   | -21,8               | -1,7                | -              | 29   | 32   | -                    | -3                   |                  |          |            |         |             | X          |         |
| Sumitomo Electric Bordnetze SE                        | Wolfsburg            | 602               | 566   | 511   | 6,4                 | 10,9                | -87            | -94  | -69  | 8                    | -26                  |                  |          |            | X       |             |            |         |
| TMD Friction GmbH                                     | Leverkusen           | -                 | 580   | 602   | -                   | -3,7                | -              | -38  | -67  | -                    | 29                   |                  |          |            | X       |             |            |         |
| IFA Holding GmbH                                      | Haldensleben         | 580               | 680   | 690   | -14,7               | -1,5                | -              | -    | 3    | -                    | -                    |                  |          | X          |         |             |            |         |
| Küster Holding GmbH                                   | Ehringshausen        | 579               | 574   | 594   | 0,9                 | -3,4                | -              | 24   | 32   | -                    | -8                   |                  |          | X          |         | X           | X          |         |
| WOCO GmbH & Co. KG                                    | Bad Soden-Salmünster | 554               | 585   | 593   | -5,3                | -1,4                | -              | 4    | 13   | -                    | -9                   |                  |          | X          | X       |             | X          |         |
| Norma Group SE  | Maintal              | 553               | 666   | 685   | -17,0               | -2,8                | 20             | 97   | 134  | -77                  | -37                  |                  |          |            |         |             | X          |         |
| Otto Fuchs KG   | Meinerzhagen         | -                 | 542   | 537   | -                   | 0,9                 | -              | -    | -    | -                    | -                    |                  |          | X          | X       |             |            |         |
| Rosenberger Hochfrequenztechnik GmbH & Co. KG         | Fridolfing           | 536               | 541   | 535   | -1,0                | 1,1                 | -              | 141  | 174  | -                    | -33                  |                  |          |            |         |             | X          |         |
| TI Automotive Holdings GmbH                           | Heidelberg           | -                 | 518   | 574   | -                   | -9,7                | -              | 34   | 25   | -                    | 10                   |                  |          | X          |         |             |            |         |
| Behr-Hella Thermocontrol GmbH                         | Lippstadt            | 512               | 584   | 495   | -12,4               | 18,0                | -10            | 15   | 23   | -25                  | -9                   |                  |          |            |         | X           |            |         |
| Modine Europe GmbH                                    | Filderstadt          | -                 | 495   | 514   | -                   | -3,6                | -              | 16   | 26   | -                    | -10                  |                  |          | X          |         |             | X          |         |
| VOSS Holding GmbH + Co. KG                            | Wipperfurth          | -                 | 484   | 473   | -                   | 2,4                 | -              | 62   | 90   | -                    | -28                  |                  |          |            |         | X           | X          |         |
| Kromberg & Schubert Automotive GmbH & Co. KG          | Renningen            | -                 | 475   | 476   | -                   | -0,3                | -              | 1    | 2    | -                    | -2                   |                  |          |            | X       | X           |            |         |
| Walter Klein GmbH & Co. KG (Erbslöh, WKW)             | Wuppertal            | 473               | 618   | 698   | -23,5               | -11,5               | -              | -33  | 38   | -                    | -72                  |                  | X        | X          |         |             |            |         |
| SKF GmbH  | Schweinfurt          | -                 | 471   | 492   | -                   | -4,1                | -              | 11   | 56   | -                    | -46                  |                  |          |            |         | X           | X          |         |
| Scherdel GmbH   | Marktredwitz         | 460               | 551   | 591   | -16,5               | -6,7                | -              | 12   | 36   | -                    | -24                  |                  |          |            |         | X           | X          |         |
| Hübner GmbH & Co. KG                                  | Kassel               | -                 | 457   | 348   | -                   | 31,4                | -              | 44   | 28   | -                    | 16                   | X                | X        |            |         |             |            |         |
| TD Deutsche Klimakompressor GmbH                      | Bernsdorf            | -                 | -     | 451   | -                   | -                   | -              | -    | 17   | -                    | -                    |                  |          |            |         | X           |            |         |
| Hengst SE & Co. KG                                    | Münster              | 432               | 430   | 389   | 0,6                 | 10,4                | -              | 20   | 31   | -                    | -12                  |                  |          | X          |         |             | X          |         |
| Nexans autoelectric GmbH                              | Floß                 | 419               | 464   | 460   | -9,7                | 0,9                 | -              | -    | -    | -                    | -                    |                  |          |            |         | X           | X          |         |
| Eissmann Automotive Deutschland GmbH                  | Bad Urach            | -                 | 408   | 454   | -                   | -10,0               | -              | -2   | 14   | -                    | -16                  | X                |          |            |         |             |            |         |
| Allgaier Werke GmbH                                   | Uhingen              | -                 | 406   | 390   | -                   | 4,1                 | -              | -44  | 19   | -                    | -64                  |                  | X        |            |         |             |            |         |
| BMTS Technology GmbH & Co. KG                         | Stuttgart            | -                 | 406   | 366   | -                   | 10,8                | -              | -37  | 41   | -                    | -77                  |                  |          | X          |         |             |            |         |
| Pretti Produktions Holding GmbH                       | Pfullingen           | -                 | 404   | 383   | -                   | 5,5                 | -              | 10   | 10   | -                    | -0                   | X                |          | X          |         | X           |            |         |
| Witzenmann GmbH                                       | Pforzheim            | 402               | 465   | 452   | -13,6               | 3,0                 | -              | 34   | 30   | -                    | 4                    |                  |          | X          |         |             | X          |         |
| Swoboda Wiggensbach KG                                | Wiggensbach          | 400               | 450   | 400   | -11,1               | 12,5                | -              | -    | -    | -                    | -                    |                  |          | X          | X       | X           |            |         |
| SHW AG  | Aalen                | 393               | 432   | 421   | -9,1                | 2,7                 | -5             | 15   | 7    | -19                  | 7                    |                  |          | X          | X       |             |            |         |
| IMS Gear SE & Co. KGaA                                | Donaueschingen       | 393               | 446   | 463   | -12,0               | -3,7                | 7              | 21   | 41   | -14                  | -20                  |                  |          | X          | X       | X           |            |         |
| Hugo Kern und Liebers GmbH & Co.KG                    | Schramberg           | 383               | 442   | 448   | -13,4               | -1,3                | -14            | 8    | 59   | -22                  | -52                  |                  |          |            |         |             | X          |         |
| Progress-Werk Oberkirch AG                            | Oberkirch            | 371               | 459   | 476   | -19,1               | -3,7                | -8             | 22   | 20   | -30                  | 3                    |                  | X        |            | X       |             | X          |         |
| Hoerbig Deutschland Holding GmbH                      | Schongau             | -                 | 366   | 422   | -                   | -13,3               | -              | 10   | 24   | -                    | -15                  |                  |          | X          |         | X           |            |         |

## Sales of TOP 100 automotive suppliers in Germany down to 2015 level

Note: Only TOP 100 companies were considered whose data were consistently available (2015 to 2020)

Sales of the TOP 100 automotive suppliers in Germany rose to €228 billion by 2019 and fell by just under 13% to below €200 billion in 2020. This puts sales at roughly the same level as in 2015.

The size structure of the companies does not play a significant role in the decline in sales. On average, the relative decline in sales among the TOP 10 companies is similarly high (-12.6%) as among the TOP 11-50 suppliers (-12.9%) and the TOP 51-100 companies (-12.5%).



Sales of the TOP 100 auto suppliers in Germany fell by 13% to €199 billion in 2020.

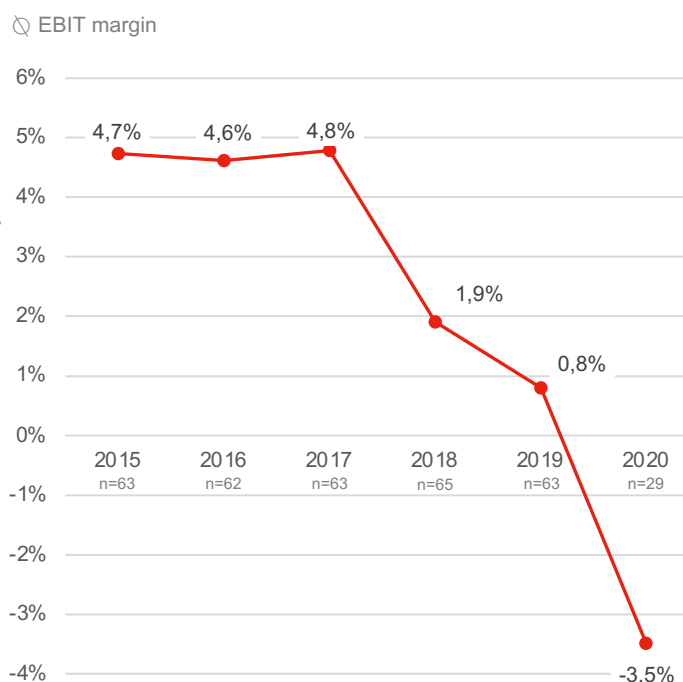
## Average EBIT margin of the TOP 100 automotive suppliers is negative

Note: Only TOP 100 companies reporting both automotive sales and automotive EBIT were taken into account.

The average EBIT margin of the TOP 100 automotive suppliers in Germany fell from 4.8% in 2017 to -3.5% in 2020.

A downward trend in the average EBIT margins of the TOP 100 companies was already apparent in the two pre-Corona years. They fell from 4.8% (2017) to 1.9% (2018) and 0.8% (2019).

While the EBIT margin of the TOP 10 automotive suppliers was still significantly above the margin of the TOP 11-100 (~4%) at around 7% p.a. until 2018, it adjusted in 2019 (both 0.8%) and was below the average margin of the TOP 11-100 (-2.7%) at -5.7% in 2020.



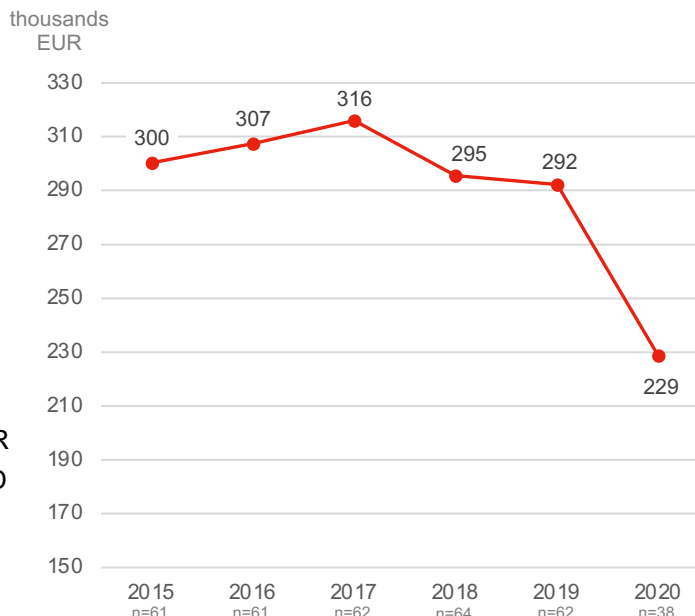
The EBIT margin of the TOP 100 automotive suppliers in Germany was -3.5% in 2020.

## Sales per employee of TOP 100 automotive suppliers down

Note: Only TOP 100 companies were taken into account that report both automotive sales and employee numbers.

Sales per employee of the TOP 100 automotive suppliers in Germany increased from EUR 300 thousand to EUR 316 thousand from 2015 to 2017. In 2018 and 2019, the industry's average performance declined by 6.5% to EUR 295 thousand and EUR 292 thousand, respectively.

Last year, the ratio fell by 21.8% to EUR 229 thousand, largely due to the COVID 19 pandemic.

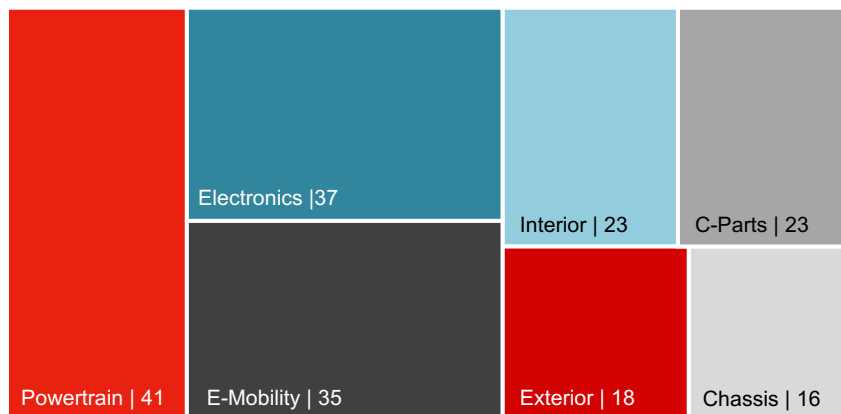


Revenue per employee of the TOP 100 fell to EUR 229.000 in 2020.

## Product portfolio: Powertrain, electronics and electromobility dominate

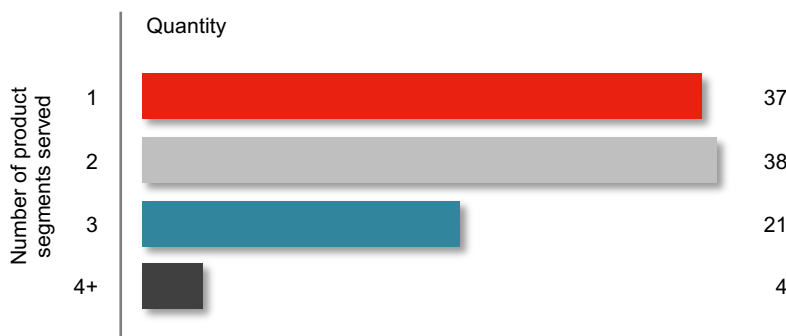
Note: Number of product segments served, multiple answers possible

Most of the companies in the TOP 100 automotive suppliers in Germany manufacture drive components (41), electronic parts (37) or products for electromobility (35).



The Powertrain (41), Electronics (37) and E-Mobility (35) product segments dominate.

Three quarters of the TOP 100 automotive suppliers in Germany serve no more than 2 market segments. Only 4% of the companies supply products in four or more product categories.



75% of the companies focus on one or two product segments.







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## About us

### PROFILE: SPECIALIST FOR INDUSTRIAL MARKET ANALYSIS FROM MUNICH

MEYER INDUSTRY RESEARCH from Munich specializes in customized market analysis, market studies and specific market research for industry and B2B sectors (automotive, engineering and electronics).

### EXPERTS FOR MARKET ANALYSIS FOR OVER 10 YEARS

In 2007, founder Matthias Meyer and his team began systematically analyzing markets, competitors, customers and trends under the umbrella of the predecessor company RESEARCH-FELLOWS in Munich.

In mid-2015, the company was renamed MEYER INDUSTRY RESEARCH. Since then, we have been focusing entirely on sophisticated market analyses in B2B and industry as a small team of specialists.

### MARKET ANALYSIS AND MARKET RESEARCH FOR THE AUTOMOTIVE INDUSTRY

MEYER INDUSTRY RESEARCH provides strategic market analyses and individual market studies for OEMs, suppliers and service providers in the automotive sector. An automotive market analysis by MEYER INDUSTRY RESEARCH highlights, for example, market volume, market potential, competitors, target customers as well as success factors and trends in the market.

Automotive market research serves our clients as a reliable basis for decision-making when launching innovations, acquiring new customers, for strategy projects or for analyzing the competition both nationally and internationally. In numerous projects, M&A consultancies and investment companies also make use of our short-term industry analyses relating to OEMs and suppliers.

### OUR CLAIM: PERSONAL COOPERATION AND RESILIENT RESULTS

A personal and trusting cooperation with our customers is our top priority. According to the Dalai Lama, cooperation can always succeed when the happiness of the other person is close to one's heart. This principle is the guiding principle for founder Matthias Meyer and his market analysis team in Munich.

Because we know that our market analyses are often the basis for far-reaching business decisions, we attach great importance to the high quality and resilience of our analysis results. You benefit from our experience of more than 300 realized market and competition analyses in the industrial sector.

**Matthias Meyer and his market analysis team, based in Munich, will be happy to answer your inquiries personally.**

## Comments on the study: TOP 100 automotive suppliers in Germany

### General

- The study took into account companies that
  - produce products (according to the defined product categories) for the automotive manufacturers and
  - have a location in Germany
- Not included were manufacturers of
  - Materials (e.g. fabrics, adhesives, rubber, paints, granulates, substrates, wires, aluminum, etc.),
  - wheel and tire manufacturers as well as
  - engineering service providers
- The ranking is based on the key figures of the respective German company, i.e., for example, only the key figures of Lear Corporation GmbH were taken into account and not the figures of Lear Corporation, USA (Group).

### Notes TOP 100 ranking (page 2 and 3)

- Key figures in black refer to the respective automotive division or to the entire company in the case of pure automotive suppliers
- Values in gray are key figures for the entire company and include other business areas/sectors.
- A " - " in the table stands for key figures that have not (yet) been published or values that cannot be calculated.

\* Nemak = Nemak Wernigerode GmbH, Nemak Wernigerode Casting GmbH & Co. KG, Nemak Europe GmbH, Nemak Pilsting GmbH, Nemak Dillingen Casting GmbH & Co. KG, Nemak Dillingen GmbH

\*\* GKN Driveline = GKN Driveline Trier GmbH, GKN Driveline International GmbH, GKN Driveline Deutschland GmbH

### Comments on the product categorization

Interior: e.g. Interior, Trims, Seats & Passive Safety, Pedals, Controls, Switches, Steering Wheels

Exterior: e.g. Exterior, Structural Parts & Materials

Powertrain: e.g. engine, exhaust system, fuel systems, transmission, radiator/engine cooling system, shift systems, pumps

Chassis: e.g. chassis (components), axles, brakes, steering, suspension

Electronics: e.g., electronics, electrical, sensors, HVAC, lighting, closure systems (liftgates, convertible tops, windows, doors)

E-mobility: e.g. drive battery, e-motor, e-axle, high-voltage electrical systems, power electronics, e-motor/battery components

C-parts: e.g. cables, hoses, seals, connectors, filters, stabilizers, tensioning systems, cable technology, fastening systems

### Sources:

Bundesanzeiger, annual reports, suppliers' websites, Bisnode company database, Orbis - Bureau van Dijk company database, VDA - Verband der Automobilindustrie e. V., press releases.

**The data were collected in September 2021.**