

**TOP  
100**

# E-Mobility Supplier

in Germany 2020



## Top 100 E-Mobility Supplier in Germany (1-50)

| Company   |          |                        | Key Figures     |             |           | Product Portfolio |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
|---|----------|------------------------|-----------------|-------------|-----------|-------------------|---------------|--------------------|-----------------------|--------------------|-------------------|--------------------|-------------------------|-------------------|------------------|-------|
| Name  | ZIP Code | City                   | Revenue (mm. €) | EBIT Margin | Employees | Engine/E-axle     | Drive battery | Battery management | Battery/Motor housing | Thermal management | Power electronics | High-voltage comp. | Charging infrastructure | Special seals/NVH | Drive components | Other |
| Robert Bosch GmbH - Mobility Solutions Division             | 70839    | Gerlingen-Schillerhohe | 47.567          | 7,4%        | 237.094   | X                 | X             |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| ZF Friedrichshafen AG                                       | 88046    | Friedrichshafen        | 36.929          | 4,1%        | 148.969   | X                 |               | X                  |                       | X                  |                   |                    |                         |                   |                  |       |
| Schaeffler AG   | 91074    | Herzogenaurach         | 14.241          | 9,5%        | 92.478    | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Mahle GmbH  | 70376    | Stuttgart              | 12.581          | 6,1%        | 79.564    | X                 |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| Siemens AG - Division Energy Management                     | 91058    | Erlangen               | 12.266          | 8,2%        | 53.300    |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Freudenberg SE  | 69469    | Weinheim               | 9.455           | 9,6%        | 48.894    |                   |               |                    |                       |                    |                   |                    |                         | X                 |                  |       |
| ThyssenKrupp AG - Components Technology                     | 45145    | Essen                  | 7.875           | 1,5%        | 34.481    |                   |               | X                  |                       |                    |                   |                    |                         |                   | X                |       |
| Vitesco Technologies GmbH (bis 2019 Continental Powertrain) | 30165    | Hannover               | 7.741           | 1,5%        | 42.601    | X                 |               | X                  | X                     |                    | X                 |                    |                         |                   |                  |       |
| HELLA GmbH & Co. KGaA                                       | 59552    | Lippstadt              | 6.990           | 8,4%        | 38.845    |                   | X             |                    |                       | X                  |                   |                    |                         |                   |                  |       |
| Leoni AG  | 90402    | Nürnberg               | 5.101           | 2,8%        | 92.549    |                   |               |                    |                       |                    | X                 | X                  |                         |                   |                  |       |
| Fritz Dräxlmaier GmbH & Co. KG                              | 84137    | Vilsbiburg             | 4.551           | 2,7%        | 78.287    |                   | X             | X                  |                       |                    | X                 |                    |                         |                   |                  |       |
| Magna Deutschland *   | 63877    | Sailauf                | 4.143           | n.a.        | 20.255    | X                 |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Mann + Hummel International GmbH & Co. KG                   | 71636    | Ludwigsburg            | 3.955           | 2,4%        | 21.149    |                   |               |                    |                       |                    |                   |                    |                         |                   |                  | X     |
| Webasto SE  | 82131    | Stockdorf              | 3.433           | 5,9%        | 13.298    |                   | X             |                    |                       |                    | X                 | X                  |                         |                   |                  |       |
| BorgWarner Europe GmbH                                      | 68755    | Ketsch                 | 3.093           | 5,8%        | 8.989     | X                 |               |                    | X                     | X                  |                   |                    |                         |                   |                  |       |
| Voestalpine AG - Metal Forming Division                     | 72581    | Dettingen an der Erms  | 2.937           | 3,2%        | 12.240    |                   |               |                    | X                     |                    |                   |                    |                         |                   | X                |       |
| Rheinmetall Automotive AG (KSPG)                            | 74172    | Neckarsulm             | 2.930           | 8,9%        | 12.855    | X                 | X             | X                  | X                     | X                  |                   |                    |                         |                   |                  |       |
| Phoenix Contact GmbH & Co. KG                               | 32825    | Blomberg               | 2.344           | 6,9%        | 16.038    |                   |               |                    |                       |                    | X                 | X                  |                         |                   |                  |       |
| Vibracoustic GmbH   | 64293    | Darmstadt              | 2.147           | 8,1%        | 10.014    |                   |               |                    |                       |                    |                   |                    |                         | X                 |                  |       |
| Schott AG   | 55122    | Mainz                  | 2.083           | 13,1%       | 15.092    |                   |               |                    |                       |                    | X                 |                    | X                       |                   | X                |       |
| Faurecia Automotive GmbH                                    | 31655    | Stadthagen             | 1.959           | -0,1%       | 6.040     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| SKF GmbH  | 97421    | Schweinfurt            | 1.820           | 0,6%        | 4.802     |                   |               |                    |                       |                    |                   |                    |                         |                   | X                |       |
| Eiringsklinger AG   | 72581    | Dettingen/Erms         | 1.699           | 5,9%        | 10.033    | X                 | X             | X                  |                       |                    | X                 |                    |                         |                   | X                |       |
| Kromberg & Schubert GmbH & Co. KG                           | 71272    | Renningen              | 1.674           | 1,3%        | 46.204    |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| TE Connectivity Germany GmbH                                | 64625    | Bensheim               | 1.415           | 13,6%       | 3.767     |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Benteler Automobiltechnik GmbH                              | 33102    | Paderborn              | 1.390           | -5,5%       | 4.698     | X                 |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| Aptiv Services Deutschland GmbH                             | 42119    | Wuppertal              | 1.386           | -9,0%       | 2.609     |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Preh GmbH   | 97616    | Bad Neustadt/ Saale    | 1.319           | 3,4%        | 6.993     |                   |               | X                  |                       |                    |                   |                    |                         |                   |                  |       |
| Hirschvogel Holding GmbH                                    | 86920    | Denklingen             | 1.254           | 3,2%        | 6.133     |                   |               |                    |                       |                    |                   |                    |                         |                   | X                |       |
| Röchling Automotive SE & Co.KG                              | 68165    | Mannheim               | 1.232           | n.a.        | 6.098     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| Lapp Holding AG   | 70565    | Stuttgart              | 1.153           | 5,3%        | 3.639     |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Nexans Deutschland GmbH                                     | 30179    | Hannover               | 1.124           | -0,4%       | 12.469    |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  | X     |
| Marquardt GmbH  | 78604    | Rietheim-Weilheim      | 986,3           | -0,7%       | 1.760     |                   |               | X                  |                       |                    |                   |                    |                         |                   |                  |       |
| Albert Handtmann Metallgusswerk GmbH & Co. KG               | 88400    | Biberach               | 876,3           | 5,6%        | 3.291     |                   |               |                    | X                     | X                  |                   |                    |                         |                   |                  |       |
| Schneider Electric GmbH                                     | 40880    | Ratingen               | 791,1           | -2,1%       | 1.661     |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Harting Stiftung & Co. KG                                   | 32423    | Espelkamp              | 761,5           | n.a.        | 4.571     |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Modine Europe GmbH  | 70794    | Filderstadt            | 754,5           | 3,2%        | 3.970     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| Scherdel Verwaltungs-GmbH                                   | 95615    | Marktrechwitz          | 710,7           | 5,0%        | 5.498     |                   |               |                    |                       | X                  | X                 |                    |                         |                   | X                |       |
| GKN Driveline Deutschland GmbH                              | 63073    | Offenbach a.M.         | 647,1           | -8,2%       | 2.914     | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
| VOSS Holding GmbH + Co. KG                                  | 51679    | Wipperfurth            | 630,8           | 14,3%       | 4.688     |                   |               |                    |                       | X                  |                   |                    |                         |                   |                  |       |
| Coroplast Fritz Müller GmbH & Co. K.G.                      | 42279    | Wuppertal              | 498,1           | 10,7%       | 5.535     |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Progress-Werk Oberkirch AG                                  | 77704    | Oberkirch              | 485,0           | 4,0%        | 3.426     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| Gestamp Umformtechnik GmbH                                  | 14974    | Ludwigsfelde           | 479,9           | 3,3%        | 1.802     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| KSM Castings Group GmbH                                     | 31137    | Hildesheim             | 451,7           | -0,5%       | 2.470     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| Nidec Motors & Actuators (Germany) GmbH                     | 74321    | Bietigheim-Bissingen   | 438,6           | 8,3%        | 330       | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Wittenstein SE  | 97999    | Igersheim              | 436,0           | 6,3%        | 2.801     | X                 |               |                    |                       | X                  |                   |                    |                         |                   |                  |       |
| Kostal Industrie GmbH & Co. KG                              | 58513    | Lüdenscheid            | 410,5           | 16,5%       | 1.719     |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Trelleborg Sealing Solutions Germany GmbH                   | 70565    | Stuttgart              | 384,8           | 10,2%       | 572       |                   |               |                    |                       |                    |                   |                    |                         | X                 |                  |       |
| BMZ - Batterien-Montage-Zentrum GmbH                        | 63791    | Karlstein-Dettingen    | 323,9           | 1,0%        | 891       |                   | X             |                    |                       |                    |                   |                    |                         |                   |                  |       |
| ST Extruded Products Germany GmbH (STEP-G)                  | 88267    | Vogt                   | 229,3           | -6,2%       | 597       |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |

\* see note on key figures on page 7

Key figures in gray are estimated

## Top 100 E-Mobility Supplier in Germany (51-100)

| Company  |          |                         | Key Figures     |             |           | Product Portfolio |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
|--|----------|-------------------------|-----------------|-------------|-----------|-------------------|---------------|--------------------|-----------------------|--------------------|-------------------|--------------------|-------------------------|-------------------|------------------|-------|
| Name   | ZIP Code | City                    | Revenue (mm. €) | EBIT Margin | Employees | Motor/E-axle      | Drive battery | Battery management | Battery/Motor housing | Thermal management | Power electronics | High-voltage comp. | Charging infrastructure | Special seals/NVH | Drive components | Other |
| Benning Elektrotechnik und Elektronik GmbH & Co. KG    | 46397    | Bocholt                 | 226,3           | 2,4%        | 1.557     |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Valeo Siemens eAutomotive Germany GmbH                 | 91056    | Erlangen                | 208,7           | -151,7%     | 1.192     | X                 |               |                    |                       |                    | X                 | X                  |                         |                   |                  |       |
| technotrans SE   | 48336    | Sassenberg              | 207,9           | 4,0%        | 1.280     |                   |               |                    |                       | X                  |                   |                    | X                       |                   |                  |       |
| Littelfuse Europe GmbH                                 | 28279    | Bremen                  | 202,5           | 11,6        | 74        |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| ODU Verwaltungs GmbH                                   | 84453    | Mühl Dorf a. Inn        | 203,6           | 21,4%       | 1.913     |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Constellium Extrusions Deutschland GmbH                | 74564    | Crailsheim              | 191,9           | 0,5%        | 155       |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| KE Elektronik GmbH                                     | 74594    | Kreßberg                | 187,7           | 14,2%       | 269       |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Krah Elektronische Bauelemente GmbH                    | 57489    | Drolshagen              | 174,0           | n.a.        | 2.100     |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| VOIT Automotive GmbH                                   | 66386    | St. Ingbert             | 173,3           | 1,1%        | 788       |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  | X     |
| Schweizer Group Global GmbH                            | 73110    | Hattenhofen             | 150             | n.a.        | 1.000     |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| ERNI Production GmbH & Co. KG                          | 73099    | Adelberg                | 147,9           | 0,9%        | 525       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Lumberg Connect GmbH                                   | 58579    | Schalksmühle            | 147,7           | 0,9%        | 764       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Eugen Forschner GmbH                                   | 78549    | Spaichingen             | 105,9           | 3,3%        | 130       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Frenzelit GmbH   | 95460    | Bad Berneck             | 96,2            | 12,3%       | 446       |                   |               |                    |                       |                    |                   |                    |                         | X                 |                  |       |
| EM-motive GmbH   | 31139    | Hildesheim              | 92,4            | 1,1%        | 298       | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
| HEW-KABEL GmbH   | 51688    | Wipperfürth             | 80,0            | 9,8%        | 356       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Schurter GmbH  | 79346    | Endingen am Kaiserstuhl | 71,3            | 5,3%        | 189       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Hydro Extrusion Offenburg GmbH                         | 77656    | Offenburg               | 70,0            | 1,3%        | 216       |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  |       |
| sonnen GmbH  | 87499    | Wildpoldsried           | 68,1            | -37,6%      | 319       |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Vollbox AG   | 33129    | Delbrück                | 66,9            | 8,4%        | 235       |                   | X             | X                  |                       |                    |                   |                    |                         |                   |                  |       |
| PVS Kunststofftechnik GmbH & Co. KG                    | 74676    | Niedernhall             | 63,4            | 6,0%        | 276       |                   |               |                    |                       |                    |                   |                    |                         |                   |                  | X     |
| ABL SURSUM Bayerische Elektrozubehör GmbH & Co. KG     | 91207    | Lauf a. d. Pegnitz      | 62,9            | 0,3%        | 396       |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Gentherm GmbH  | 85235    | Odelzhausen             | 61,7            | n.a.        | 251       |                   |               |                    |                       | X                  |                   |                    |                         |                   |                  |       |
| Amphenol-Tuchel Electronics GmbH (Amphenol-Automotive) | 74080    | Heilbronn               | 50,2            | 20,1%       | 172       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Intica Systems AG                                      | 94032    | Passau                  | 47,9            | -1,9%       | 518       |                   |               |                    |                       |                    |                   |                    |                         |                   |                  | X     |
| E3/DC GmbH   | 49074    | Osnabrück               | 45,4            | 2,2%        | 87        |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| HP Pelzer Automotive GmbH                              | 44795    | Bochum                  | 45              | n.a.        | 210       |                   |               |                    |                       |                    |                   |                    |                         | X                 |                  |       |
| Dressler Metallverarbeitung GmbH                       | 88515    | Langenenslingen         | 43,2            | 13,4%       | 236       |                   |               |                    | X                     |                    |                   |                    |                         |                   |                  | X     |
| Diehl Advanced Mobility GmbH                           | 16792    | Zehdenick               | 40,4            | 3,7%        | 278       |                   |               |                    |                       |                    |                   |                    |                         |                   |                  | X     |
| Plastimat GmbH   | 16515    | Oranienburg             | 37              | 8,4%        | 219       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Walther-Werke Ferdinand Walther GmbH                   | 67304    | Eisenberg (Pfalz)       | 34              | 1,5%        | 244       |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Huber Automotive AG                                    | 73347    | Mühlhausen i. T.        | 26,8            | 4,9%        | 79        | X                 |               | X                  |                       |                    | X                 |                    |                         |                   |                  |       |
| ATE Antriebstechnik und Entwicklungs GmbH              | 88299    | Leutkirch im Allgäu     | 25,9            | 23,6%       | 109       | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Silver Atena GmbH                                      | 80995    | München                 | 25              | 28,0%       | 273       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Akasol AG  | 64293    | Darmstadt               | 21,6            | -4,6%       | 154       |                   | X             |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Axon Kabel GmbH  | 71229    | Leonberg                | 20,7            | 4,8%        | 32        |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Mennekes Stecker GmbH & Co. KG                         | 57399    | Kirchhundem             | 15,1            | -1,3%       | 63        |                   |               |                    |                       |                    | X                 | X                  |                         |                   |                  |       |
| CTX Thermal Solutions                                  | 41334    | Nettetal                | 13              | 20,5%       | 24        |                   |               |                    | X                     | X                  |                   |                    |                         |                   |                  |       |
| AAM Germany GmbH                                       | 61352    | Bad Homburg             | 12,5            | 4,0%        | 63        | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Deutsche Accumotive GmbH & Co. KG                      | 01917    | Kamenz                  | n.a.            | n.a.        | 1.000     |                   | X             |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Lust Hybrid-Technik GmbH                               | 07629    | Hermisdorf              | n.a.            | n.a.        | 100       |                   |               |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| in-Tec Bensheim GmbH                                   | 64625    | Bensheim                | n.a.            | n.a.        | 74        |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Plug'n Charge GmbH                                     | 34308    | Bad Emstal              | n.a.            | n.a.        | 62        |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Kaiser Werkzeugbau GmbH                                | 56244    | Helferskirchen          | n.a.            | n.a.        | 59        |                   |               |                    | X                     | X                  |                   |                    |                         |                   |                  | X     |
| stoba e-Systems GmbH                                   | 71384    | Weinstadt               | n.a.            | n.a.        | 50        | X                 | X             |                    |                       |                    | X                 |                    |                         |                   |                  |       |
| Hirschmann Automotive Freyung GmbH                     | 94078    | Freyung                 | n.a.            | n.a.        | 49        |                   |               |                    |                       |                    |                   | X                  |                         |                   |                  |       |
| Li-Tec Battery GmbH                                    | 01917    | Kamenz                  | n.a.            | n.a.        | 30        |                   | X             |                    |                       |                    |                   |                    |                         |                   |                  |       |
| Wallbe GmbH  | 33189    | Schlangen               | n.a.            | n.a.        | 28        |                   |               |                    |                       |                    |                   |                    | X                       |                   |                  |       |
| Custom Cells Itzehoe GmbH                              | 25524    | Itzehoe                 | n.a.            | n.a.        | 24        |                   | X             | X                  |                       |                    |                   |                    |                         |                   |                  |       |
| dynamic E flow GmbH                                    | 87600    | Kaufbeuren              | n.a.            | n.a.        | 20        | X                 |               |                    |                       |                    |                   |                    |                         |                   |                  |       |

Key figures in gray are estimated

## E-Mobility changes the supplier landscape - opportunities for new market players

Germany has become the third largest e-vehicle market worldwide in 2019. According to forecasts by the Center of Automotive Management (CAM), around 110,000 new e-vehicles were registered by the end of 2019.

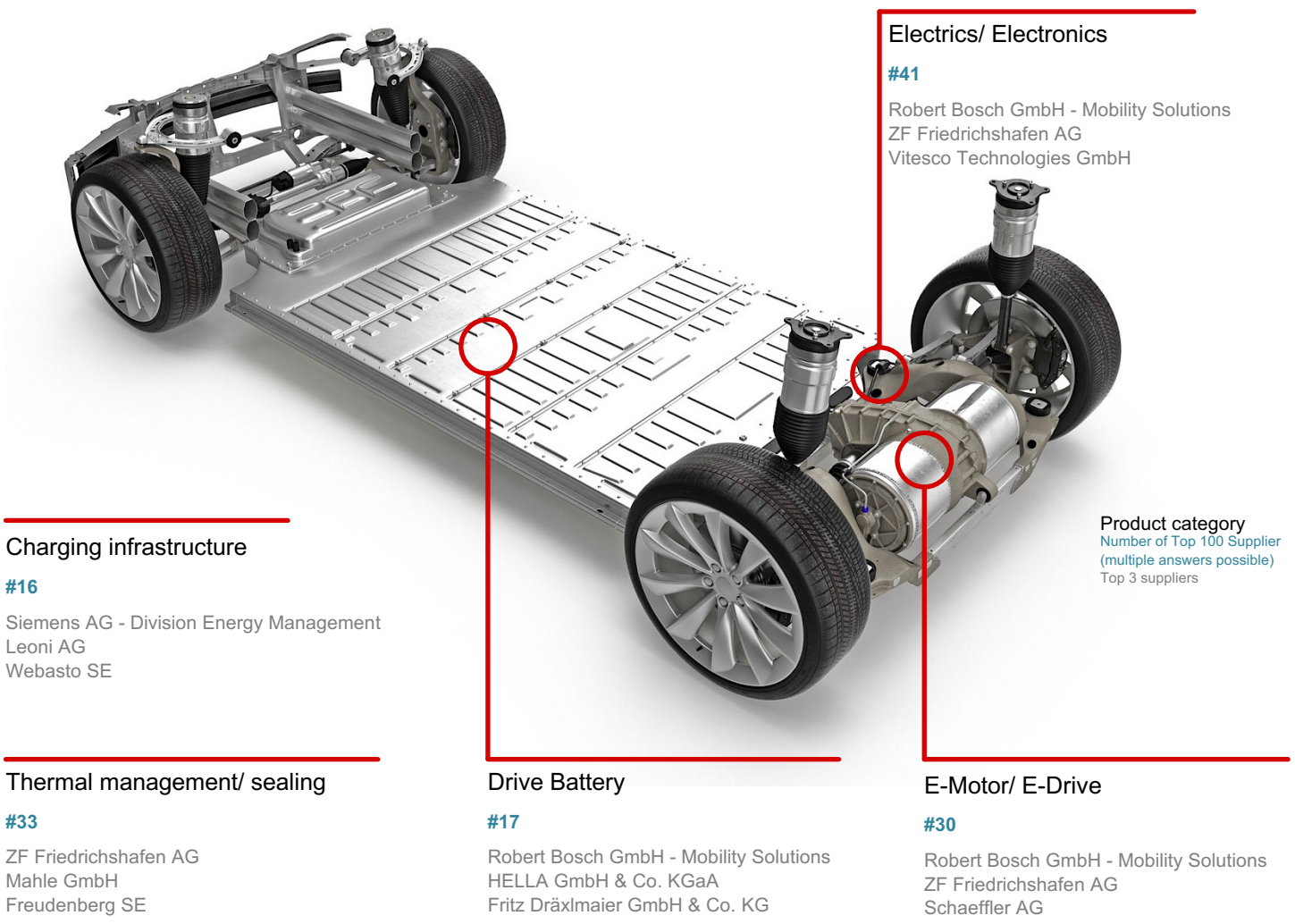
The growing demand for hybrid and electric vehicles is also changing the supplier landscape: the previously important modules for traditional motors and powertrains are becoming less important as value creation moves to the battery. High-voltage cable systems, power electronics or drive management are moving into focus.

This development is also reflected in our Top 100 ranking of the leading e-mobility suppliers in Germany: high-voltage components and battery-related parts are among the most manufactured products of German e-mobility suppliers. Our ranking shows the leading 100 suppliers in Germany that manufacture important components for e-cars.

As expected, the large supplier groups such as Bosch, ZF and Schaeffler also play a leading role when it comes to systems and components for e-vehicles. At the same time, medium-sized specialists are also taking advantage of the opportunities arising from the increasing demand for charging infrastructure, e-motors, batteries and control electronics.

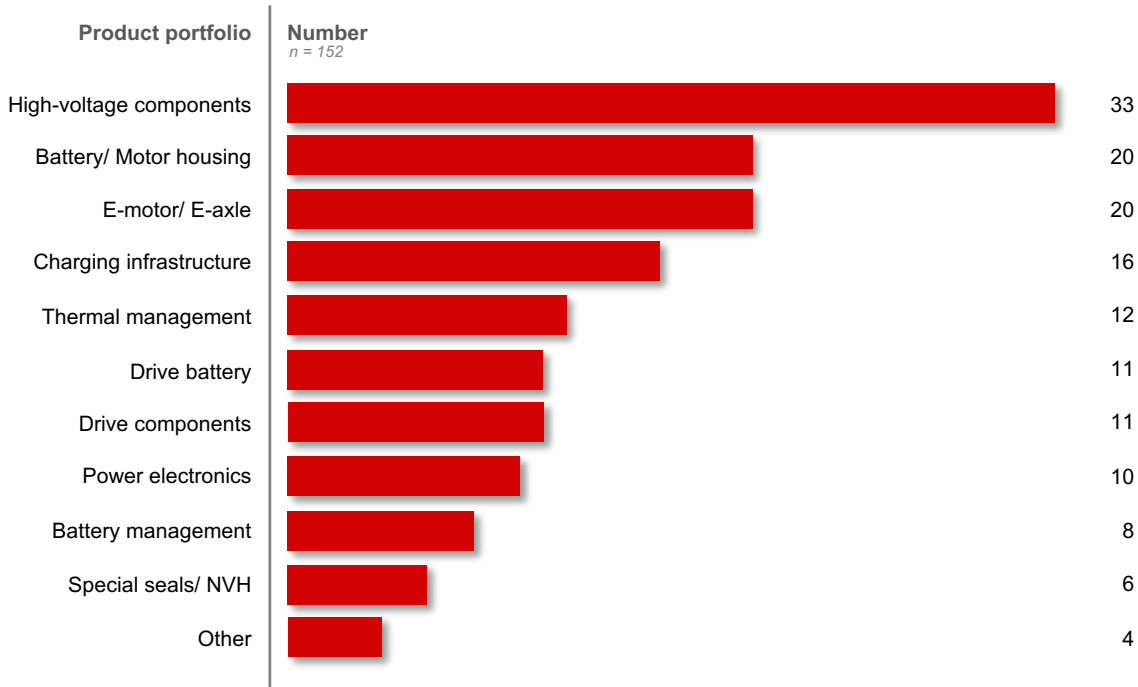
Hardly any suppliers currently report sales of e-vehicle components separately. Therefore, our ranking is based on the total sales and employee numbers of the respective companies and business units.

## Overview of relevant electromobility components and systems



## Portfolio: HV components, housings and drive systems leading the way

Note: Number by product segments served, multiple answers possible



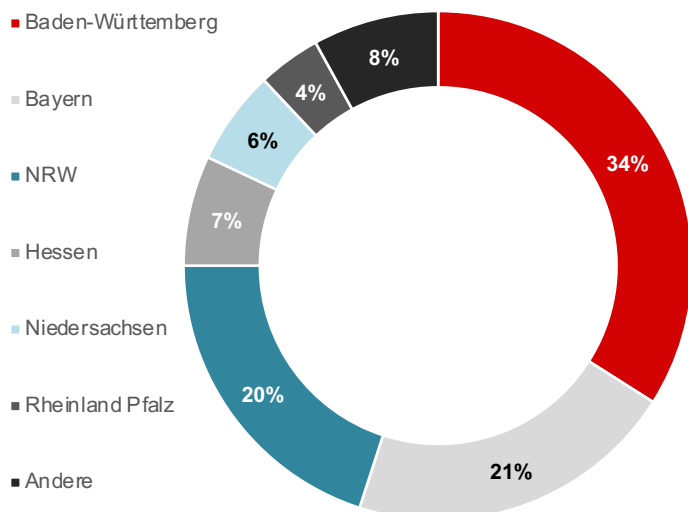
**Every third company in the Top 100 manufactures HV components**

Every third company in the Top 100 E-Mobility Suppliers manufactures high-voltage components such as cables, connectors, fuses, resistors and wiring systems.

Battery and motor housings as well as e-motors and e-axes are each developed and produced by every fifth company on the Top 100 list.

Charging infrastructure such as charging cables or wallboxes for home use, solutions for thermal management, production of the traction battery or battery packs are further product segments manufactured by more than 10% of the Top 100 E-Mobility Suppliers.

## Headquarters locations: Baden-Württemberg, Bavaria and NRW dominate



Three quarters of the top 100 e-mobility suppliers have their headquarters in Baden-Württemberg, Bavaria or NRW.

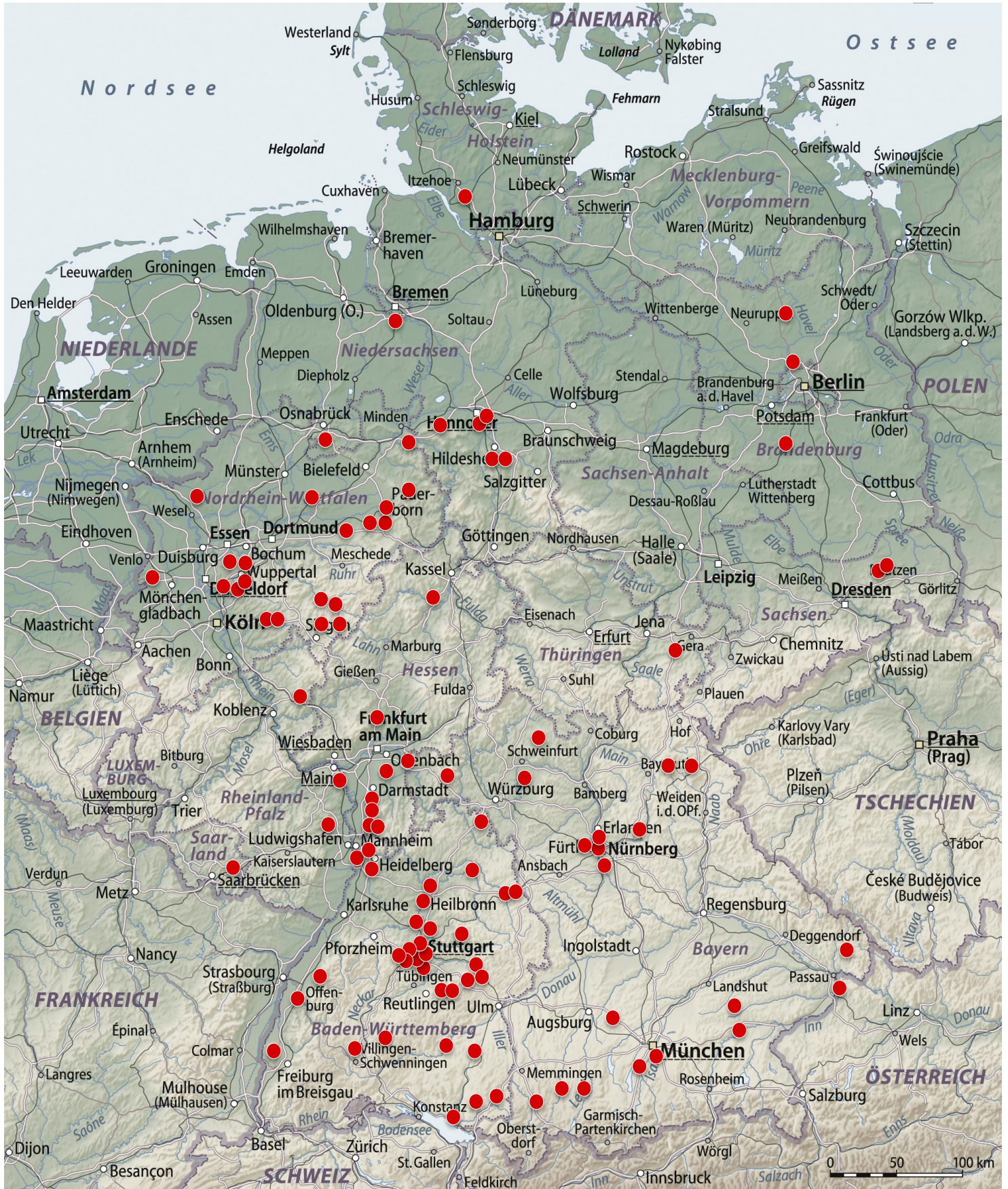
Baden-Württemberg alone accounts for more than a third of all TOP 100 headquarters locations.

After Bavaria and North Rhine-Westphalia, Hesse, Lower Saxony and Rhineland-Palatinate follow in fourth, fifth and sixth place.

**Three quarters of all TOP 100 headquarters are located in Baden-Württemberg, Bavaria and NRW**



## Top 100 E-Mobility Suppliers Headquarter Locations in Germany



● Headquarter E-Mobility Supplier

This map has been made or improved in the German Kartenwerkstatt (Map Lab) by the authors Lencer and NordNordWest (Source: [https://commons.wikimedia.org/wiki/File:Deutschland\\_%C3%9Cbersichtskarte.png](https://commons.wikimedia.org/wiki/File:Deutschland_%C3%9Cbersichtskarte.png)); Permission is granted to copy, distribute and/or modify this document under the terms of the GNU Free Documentation License, published by Free Software Foundation



## Comments on the study: TOP 100 E-Mobility Supplier in Germany 2020

### General

- The study took into account companies that
  - Produce products and/or systems for the passenger car OEM market.
  - produce products and/or systems that are used exclusively in electrified passenger cars
  - have a production and/or development site in Germany
- The following were not recorded:
  - Manufacturers of components and systems used in both internal combustion engines and electric vehicles, such as lightweight components, interior equipment (interiors) or infotainment electronics
  - Manufacturers of charging infrastructure for semi-public or public spaces (charging columns)
  - Manufacturers who do not produce products for vehicle manufacturers
  - Providers of software solutions
  - Service providers, such as consulting or pure development offices

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

- The key figures given relate to the company/corporation or business unit specified at the front (e.g. Siemens - Energy Management Division). The only exception is the Canadian supplier Magna, where there is no parent German company, which is why a fictitious company, "Magna Deutschland", is specified here and the key figures published in the annual report for Germany were used.
- The top 100 were ranked according to their sales in 2018

### Comments on the product categorization

- E-motor/ E-axle: All types of electric drive systems for use in passenger cars.
- Drive battery: All types of battery modules, battery packs and/or complete systems that supply power to the drive system of electrified passenger cars (not starter batteries).
- Battery management system for the traction battery in the electric vehicle (passenger car)
- Battery or e-motor housing: all types of housing, regardless of material (plastic, aluminum, steel)
- Thermal management (e-drive/battery): All components and systems that deal specifically with thermal management in electric vehicles (passenger cars).
- Power electronics such as inverters, control units, position encoders
- High-voltage components such as high-voltage connectors, cables, fuses, resistors, cables, harnesses, on-board power supply systems
- Charging infrastructure such as charging inlets, wallboxes (home), charging cables and connectors, charging cable cooling systems
- Special seals and/or NVH solutions for electrically powered cars
- Electric motor/battery components such as stators and rotors, stator, rotor and hollow shafts, ball, rotor position or hybrid bearings, coils, cell contacting systems, EMC filter systems, cell & pack connectors, bus bars, switching rings
- Other products such as filters/ filter media, special shielded cables, battery covers, cover systems for capacitors, glass powder for Li-Ion batteries

### Sources:

Bundesanzeiger, annual reports, suppliers' websites, Bisnode company database, Orbis - Bureau van Dijk company database, Associations such as VDA - Verband der Automobilindustrie e. V. and Bundesverband eMobilität e.V. as well as press releases.

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# MEYER INDUSTRY RESEARCH

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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.**