

SUPPLEMENT TO

# Automotive News

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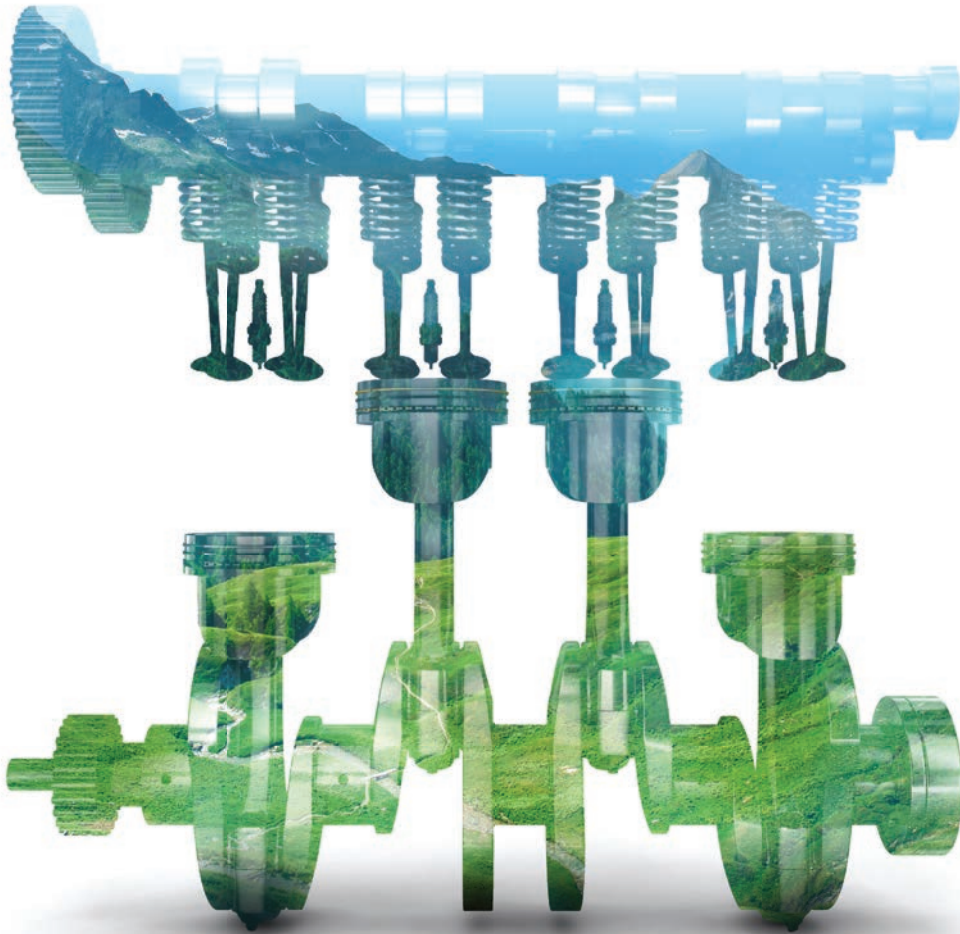
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# The biggest suppliers beef up for change

**Lindsay Chappell**  
lchappell@crain.com

**T**he supplier world is rushing into new technologies to deliver the grand vision of the auto industry — widespread electrified powertrains and advanced safety and convenience technologies that will allow vehicles to steer, accelerate and brake themselves.

But that transformation isn't having any noticeable effect on the global pecking order of the industry's biggest parts companies.

Not yet, at least.

The annual *Automotive News* ranking of the top global suppliers reveals that as the industry's main players build revenue, transform and change direction, they remain in much the same order of size as they were a year ago.

Bosch, Denso, Magna, Continental and ZF Friedrichshafen remain the world's five biggest suppliers, in the same order on the *Automotive News* list as a year ago. Only two of the top 10 — Valeo and Faurecia — changed rankings last year. They swapped positions on the list, with Faurecia No. 9 and Valeo No. 10.

The main reason suppliers, for the most part, are keeping their spots as the biggest of the big? Wealth.

The cost of playing in the game has gone up in the past few years, and only the biggest and richest can afford the rising costs of acquiring the technologies that will make the industry's vision become a reality.

## 'Dominating factor'

"You can't buy anything related to autonomous vehicle software technology now that's not in the billions of dollars," said Dietmar Ostermann, U.S. automotive advisory leader at PwC, which tracks global automotive merger and acquisition activity globally. "So if you want to be in the autonomous game, the size of your company matters massively."

Mergers and acquisitions have roiled the

segment as suppliers jockey for a seat at the table to come.

Ostermann admits to being astonished at the amount of money that technology vendors are suppliers add to their portfolios. According to PwC, the combined value of supplier mergers and acquisitions has nearly tripled from a decade ago. It averaged around \$20 billion a year for 10 years, Ostermann said. From 2014-17, it averaged about \$50 billion to \$60 billion, before jumping to a record \$97.5 billion last year.

"Technology is the dominating factor in supplier strategy," he said. "A few years ago, suppliers were on an M&A drive because automakers were moving to global platforms with global architectures, and suppliers needed to quickly merge and create more global capabilities to supply in all regions.

"The real need now is to be able to support electric vehicles, connected cars and autonomous driving."

The desire to beef up with connectivity and autonomous capabilities has triggered acquisitions for software companies and electronics innovators, small and large, in and out of the traditional car business.

Last year, there were 20 deals each worth more than \$1 billion — twice the level of activity of the past three years. The sector recorded 903 merger-acquisitions during the year. Among those that reported a deal value, the average size was \$286.8 million.

The quest for more technology is also focused on older auto parts. Even as EVs rise on the horizon, automakers are asking suppliers to help make internal combustion engines more competitive, smaller and lighter, requiring turbocharging and direct injection.

The same lightweighting effort is driving

opportunity among steel, aluminum and composite material suppliers.

## Where are the results?

Companies are questioning their past business segments and repositioning themselves for new roles through mergers, investments, divestitures and corporate restructurings — even if the technology revolution has not kicked in yet.

The expected revenue of that big future is little more than a trickle, compared with the still-robust demand for good old-fashioned brake pedals, pistons, fuel tanks, lead-acid batteries, transmissions and pickup bed liners.

But change is occurring nonetheless, and familiar names are disappearing from the list of giants as suppliers carve out new visions for their futures.

Delphi Automotive, a company that once towered as the industry's biggest supplier under various corporate names, making parts as disparate as air conditioners, brakes and radios, now appears on the list of giants as Aptiv at No. 20. Aptiv plans to focus on electronic architectures and advanced safety. The spun-off part of the old Delphi — now named Delphi Technologies — will compete in the powertrain corner of the industry. It ranks No. 62.

Johnson Controls, once a star supplier of seating, interiors and batteries, has divided into separate companies — No. 13 Adient, with an eye on seats for the autonomous age; and Clarios, focused exclusively on the future of batteries. Clarios did not submit a completed survey for this year's list.

Axle and transmission maker ZF, No. 5 on the list, grew mightier last year as a result of its 2015 acquisition of American safety systems supplier TRW.

And Japan's Panasonic Corp., ranked No. 12,



reported a 33 percent growth in revenue last year, thanks in part to its acquisition of the majority ownership of Ficos, the fast-growing Spanish supplier of cables, mirrors and other parts.

## When is the payback?

The question hanging over the heads of supplier executives: When will the new order of electrification, connectivity and autonomous driving begin delivering revenue and profit on a par with the cost of restructurings, acquisitions and development investment?

Significant financial payback could be another decade away, according to several forecasts. Although automakers ranging from Volkswagen to Toyota are rapidly developing electrified vehicle portfolios, most forecasts conclude that it will take until late in the next decade before electrified vehicles equal those powered by internal combustion engines in terms of global unit sales.

And while lower-level autonomous driving technologies are spilling into the marketplace — visible in Nissan, Cadillac, Tesla, Honda, Volvo and Mercedes-Benz vehicles — the new science remains a distant source of dominant supplier wealth. Automakers are still vague about when and where fully autonomous vehicles will appear in the market.

Until then, said Daron Gifford, strategy and automotive consulting leader at Plante Moran in Detroit, large suppliers will have to sort out the daily challenges of the auto business the same as small suppliers. Those include delivering flawless parts to customers on time, running their factories efficiently and meeting the cost reduction demands of automakers' purchasing managers.

Automakers make little distinction between large suppliers and small, Gifford said.

"Being a big guy can be helpful, maybe in being able to drive down your own costs, or in being able to drive innovation at your business," he said.

"But whether you're big or small, you face the same issues." **AN**

# Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Top executive	Total global automotive parts sales (dollars in millions) 2018	Total global automotive parts sales (dollars in millions) 2017	Percent North America 2018	Percent Europe 2018	Percent Asia 2018	Percent rest of world 2018	Products	2017 rank
1	<b>Robert Bosch</b> (49) 711-811-0; bosch.com	Postfach 106050 Stuttgart, D-70049, Germany	Volkmar Denner chairman	\$49,525 f	\$47,500 f	17	45	36	2	Powertrain solutions; chassis systems controls; electrical drives, car multimedia, electronics, steering systems & battery technology	1
2	<b>Denso Corp.</b> (81) 566-25-5511; denso.com	1-1 Showo-cho Kariya-Aichi, 448-8661, Japan	Koji Arima president & CEO	42,793 fe	40,782 fe	23	12	64	1	Thermal, powertrain control, electronic & electric systems; small motors, telecommunications	2
3	<b>Magna International Inc.</b> (905) 726-2462; magna.com	337 Magna Drive Aurora, Ontario, L4G 7K1, Canada	Donald Walker CEO	40,827	36,588	50	42	6	2	Body exteriors & structures; power & vision technologies; seating systems & complete vehicle solutions	3
4	<b>Continental</b> (49) 511-938-01; continental.com	Vahrenwalder Strasse 9 Hanover, 30165, Germany	Elmar Degenhart CEO	37,803 f	35,910 f	28	50	22	–	Advanced driver assistance systems, electronic brakes; stability management, tires, foundation brakes, chassis systems, safety electronics, telematics, powertrain electronics, injection systems & turbochargers	4
5	<b>ZF Friedrichshafen</b> (49) 7541-77-0; zf.com	Graf-von-Soden-Platz 1, Friedrichshafen, Baden-Wuerttemberg, 88046, Germany	Wolf-Henning Scheider CEO	36,929 f	34,481	28	47	21	4	Transmissions, chassis components & systems, steering systems, 5 braking systems, clutches, dampers, active & passive safety systems, driver assist systems including camera, radar & lidar	5
6	<b>Aisin Seiki Co.</b> (81) 566-24-8441; aisin.co.jp	2-1 Asahi-Machi Kariya, Aichi, 448-8650, Japan	Kanshiro Toyoda chairman	34,999 f	33,837 f	17	9	72	2	Body, brake & chassis systems, electronics, drivetrain & engine components	6
7	<b>Hyundai Mobis</b> (82) 2-2018-5114; mobis.co.kr	203 Teheran-ro, Gangnam-gu Seoul, 06141, Korea	Chung Kook Park CEO	25,624	24,984	12	9	76	3	Automotive electronics, infotainment, ADAS, EV systems, module systems, lighting, airbags & brakes	7
8	<b>Lear Corp.</b> (248) 447-1500; lear.com	21557 Telegraph Road Southfield, MI 48033, USA	Raymond Scott president & CEO	21,149	20,467	36	41	19	4	Seating & electrical systems (E-Systems)	8
9	<b>Faurecia</b> (33) 1-72-36-70-00; faurecia.com	2 Rue Hennape Nanterre, 92735, France	Patrick Koller CEO	20,667	19,170	25	51	19	5	Faurecia seating & interiors; Faurecia Clarion Electronics & Faurecia clean mobility	10
10	<b>Valeo</b> (33) 1-40-55-20-20; valeo.com	43 Rue Bayen Paris, 75017, France	Jacques Aschenbroich chairman & CEO	19,683 f	19,360 f	20	46	32	2	Micro hybrid systems, electrical & electronic systems, thermal systems, transmissions, wiper systems, camera/sensor technology, security systems, interior controls	9
11	<b>Yazaki Corp.</b> (81) 0559-65-3002; yazaki-group.com	1500 Mishuku, Susono City, Shizuoka Prefecture, 410-1194, Japan	Shinji Yazaki president	17,500 fe	15,754 fe	31	17	52	–	Wiring harnesses, connectors, junction boxes, power distribution boxes, instrumentation & high voltage systems	12
12	<b>Panasonic Automotive Systems Co.</b> (81) 6-6908-1121; panasonic.net	1006, Oaza Kadoma Kadoma City, Osaka, 571-8501, Japan	Kazuhiro Tsuga president	17,466 f	14,995 fe	34	16	50	–	Premium audio systems, navigation systems, compressors, batteries, motors, monitors, sensors; switches & HUDs	13
13	<b>Adient</b> (734) 254-5000; adient.com	49200 Halyard Drive Plymouth, MI 48170, USA	Doug Del Grosso president & CEO	17,400	16,200	30	27	43	–	Seating & seating systems & components	11
14	<b>Sumitomo Electric Industries</b> (81) 6-6220-4141; sei.co.jp	5-33 Kitahama, 4-chome, Chuo-ku Osaka City, 541-0041, Japan	Osamu Inoue president & COO	15,402 f	15,361 f	24	–	–	–	Electrical distribution systems, electronics & connection systems	14
15	<b>Yanfeng</b> (86) 21-333-81000; yanfengco.com	399 Liuzhou Road Shanghai, 200235, China	Jianxu Jia general manager	14,506	14,278	19	12	69	–	Interiors, exteriors, electronics, seating & safety	16
16	<b>Thyssenkrupp</b> (49) 201-8440; thyssenkrupp.com	Thyssenkrupp Allee 1 Essen, NRW, 45143, Germany	Guido Kerkhoff CEO	14,438 f	12,518 f	25	65	8	2	Steering, dampers, springs & stabilizers, camshafts, forged machined 19 components, bearings, undercarriage components, axles, forged crankshafts & drivetrain components, high-strength lightweight steels & electrical steel	15
17	<b>Mahle</b> (49) 711-501-0; mahle.com	Pragstrasse 26-46 Stuttgart, 70376, Germany	Joerg Stratmann chairman & CEO	14,405 f	14,441 f	27	48	20	5	Piston systems, cylinders, valvetrains, alternators, air & liquid management systems, vehicle climatization, engine & powertrain cooling, battery cooling, actuators, electric drives & starters	15
18	<b>JTEKT Corp.</b> (81) 52-527-1900; jtekt.co.jp	15th Floor, Midland Square, 4-7-1 Meieki Nakamura-ku, Nagoya, 450-8515, Japan	Tetsuo Agata president	13,078	12,709	19	16	59	6	Bearings, steering systems, driveline systems & machine tools	18
19	<b>BASF</b> (49) 621-60-0; basf.com	Carl-Bosch-Strasse 38 Ludwigshafen, 67056, Germany	Martin Brudermueller chairman	12,931 f	12,157 f	26	42	23	9	Coatings, catalysts, engineering plastics, polyurethanes, coolants, 20 brake fluids, lubricants, battery materials	20
20	<b>Aptiv</b> (44) 163-423-4422; aptiv.com	5 Hanover, Grand Canal Dock Dublin, Leinster, Ireland	Kevin Clark president & CEO	12,869	11,776	38	31	29	2	Electrical & wiring products, body controls, infotainment, safety & autonomous driving technologies	21
21	<b>Samvardhana Motherson Group</b> (91) 120-6679551; motherson.com	Plot No. 1, Sector 127, Noida - Greater Noida Expwy., Noida, U.P., 201301, India	Vivek Chaand Sehgal chairman	11,765 fe	10,550 fe	19	50	27	4	Rearview mirrors, plastic modules cockpits/IPs, door trims & bumpers, wiring harnesses, plastic parts, rubber components, lighting, air intake manifolds, pedals, shock absorbers, HVAC systems & roof hatches	23
22	<b>BorgWarner Inc.</b> (248) 754-9200; borgwarner.com	3850 Hamlin Road Auburn Hills, MI 48326, USA	Frederic Lissalde president & CEO	10,530	9,800	34	38	28	–	Turbochargers, electric motors, electronic control units, engine valve-timing, ignition systems, thermal systems, transmission-clutch systems, transmission-control & torque management systems	25

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

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23	<b>Toyota Boshoku Corp.</b> (81) 566-23-6611; toyota-boshoku.com	1-1 Toyoda-cho Kariya-shi, Aichi, 448-8651, Japan	Shuhei Toyoda chairman	\$10,153 fe	\$13,444 fe	17	6	74	3	Seats, door trim, carpet, headliners, oil & air filters, door panels, fabrics & substrates	17
24	<b>Gestamp</b> (34) 91-379-19-99; gestamp.com	Alfonso XII, 16 Madrid, 28014, Spain	Francisco Riberas executive chairman	10,096	9,263	19	62	12	7	Metal components & assemblies, body-in-white, chassis & mechanisms	27
25	<b>Schaeffler</b> (49) 9132-82-0; schaeffler.com	Industriestrasse 1-3 Herzogenaurach, Bavaria, 91074, Germany	Klaus Rosenfeld CEO	10,052 e	10,798 e	20	50	29	2	Anti-friction bearings; engine, chassis & transmission components, wheel & axle bearings, clutch & transmission systems, dampers & e-mobility products	22
26	<b>Tenneco Inc.*</b> (847) 482-5000; tenneco.com	500 N. Field Drive Lake Forest, IL 60045, USA	Brian Kessler co-CEO	10,001	8,023	47	37	16	–	Emission control systems, manifolds, catalytic converters, diesel aftertreatment systems, catalytic reduction mufflers, shock absorbers, struts, electronic suspension products & systems	32
27	<b>Plastic Omnium Co.</b> (33)1 40-87-64-00; plasticomnium.com	1 allée Pierre Burelle Levallois Cedex, 92533, France	Laurent Burelle chairman & CEO	9,740	9,596	26	55	17	2	Fascias, front-end modules, rear-end modules, fenders, body panels & fuel systems	26
28	<b>Magneti Marelli</b> (39) 02-972-27-111; magnetimarelli.com	Viale Aldo Borletti 61/63 Corbetta, Milan, 20011, Italy	Ermanno Ferrari CEO	8,702 f	9,234 f	23	58	12	7	Lighting, powertrain, electronics, suspensions systems, shock absorbers, exhaust systems & plastic parts	28
29	<b>Autoliv Inc.</b> (46) 8-587-20-600; autoliv.com	Klarabergsviadukten 70, Section B, 7th Fl. Stockholm, SE-107 24, Sweden	Mikael Bratt president & CEO	8,678	10,400	35	31	34	–	Airbags, seat belts, steering wheels & safety electronics	24
30	<b>Hitachi Automotive Systems</b> (81) 3-4232-5300; hitachi-automotive.co.jp	Shin-Otemachi bldg., 2-1, Otemachi 2-chome, Chiyoda-ku, Tokyo, 100-0004, Japan	Brice Koch president & CEO	8,638 fe	9,030 f	27	–	–	–	Engine management, electric powertrain & drive control	30
31	<b>Flex-N-Gate Corp.</b> (217) 278-2600; flex-n-gate.com	1306 E. University Ave. Urbana, IL 61802, USA	Shahid Khan chairman & CEO	8,343	7,551	80	18	1	1	Interior & exterior plastics, metal bumpers & hitches, structural metal assemblies, forward & signal lighting, mechanical	33
32	<b>Calsonic Kansei Corp.</b> (81) 3-5385-0111; calsonickansei.co.jp	2-1917 Nisshin-cho, Kita-ku Saitama City, Saitama, 331-8501, Japan	Beda Bolzenius president & CEO	8,208 f	9,188 f	28	12	61	–	Climate control, engine cooling & exhaust systems; instrument clusters, console boxes, cockpit modules, instrument panels & front-end modules	29
33	<b>Dana Inc.</b> (419) 887-3000; dana.com	3939 Technology Drive Maumee, OH 43537, USA	James Kamsickas president & CEO	8,143 f	7,209 f	50	31	12	7	Axles, driveshafts, sealing & thermal management products	36
34	<b>Benteler Automotive</b> (49) 5254-81-0; benteler.com	An der Talle 27-31 Paderborn, 33102, Germany	Ralf Goettel CEO	8,060	7,790	18	61	13	8	Components & modules for chassis, body-in-white & engine & exhaust applications & modular e-mobility system solutions	–
35	<b>Koito Manufacturing</b> (81) 3-3443-7111; koito.co.jp	4-8-3 Takanawa, Minato-ku Tokyo, 108-8711, Japan	Masahiro Ohtake chairman & CEO	7,990 f	7,500 f	22	5	11	62	Exterior lighting	34
36	<b>Hyundai-WIA Corp.</b> (82) 55-280-9114; hyundai-wia.com	Jungdong-ro 153, Changwon, Gyeongnam, 51533, South Korea	Kyung-Bae Kim president & CEO	7,758 f	7,059 f	1	8	83	8	Halfshafts, sids shafts, engines, transfer cases, power transfer units, chassis modules, axles, material parts & turbochargers	38
37	<b>Toyota Gosei Co.</b> (81) 052-400-1055; toyoda-gosei.co.jp	1 Haruhinagahata Kiyosu Aichi, 452-8564, Japan	Naoki Miyazaki president	7,642 f	7,281 f	29	5	66	–	Safety, sealing & interior systems; optoelectronics, exterior trim, rubber/plastic functionals & fuel systems	35
38	<b>Hyundai-Transys Inc.</b> (82) 31-369-9914; hyundai-transys.com	703-2, Galhyun-ri, Seogyoun-myun Seosan-si, Chungcheongnam-do, South Korea	Sudong Yeo CEO	7,574 f	7,834 f	21	10	68	1	Automatic, manual & dual-clutch transmissions; axles & seating systems	–
39	<b>Brose Fahrzeugteile</b> (49) 9561-21-0; brose.com	Max-Brose-Str. 1 Coburg, 96450, Germany	Kurt Sauernheimer CEO	7,340	7,089	27	50	21	2	Mechatronic systems for vehicle doors & seats as well as electric & electronic products for steering, brakes, transmissions & engine cooling	37
40	<b>American Axle &amp; Mfg. Holdings Inc.</b> (313) 758-2000; aam.com	One Dauch Drive Detroit, MI 48211, USA	David Dauch chairman & CEO	7,270	6,266	78	9	10	3	Driveline & drivetrain systems & related components	40
41	<b>JATCO</b> (81) 545-51-0047; jatco.co.jp	700-1, Imaizumi Fuji City, Shizuoka, 417-8585, Japan	Teruaki Nakatsuka president & CEO	6,812 f	6,991 f	26	2	73	–	Automatic transmissions & continuously variable transmissions	39
42	<b>HELLA</b> (49) 2941-38-0; hella.com	Rixbecker Strasse 75 Lippstadt, 59552, Germany	Rolf Breidenbach president & CEO	6,801 f	6,280 f	17	66	17	–	Electronic & lighting components & systems	45
43	<b>GKN Automotive†</b> (44) 0-1207-463-2351; gknautomotive.com	50 Pall Mall, St. James's, London SW1Y 5JH, UK	Liam Butterworth CEO	6,450	8,751	36	36	28	–	Driveline halfshafts, driveshafts, e-drive & awd systems	31
44	<b>Grupo Antolin</b> (34) 947-47-7700; grupoantolin.com	Ctra. Madrid-Irun Km. 244'8 Burgos, E09007, Spain	Ernesto Antolin chairman	6,408	6,367	36	50	11	2	Overhead systems, door modules & panels, window regulators, interior & exterior lighting & cockpits	42

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

\*Tenneco acquired Federal-Mogul in Oct. 2018. Sales listed include Federal Mogul's for Oct. - Dec. 2018.

†GKN is now a unit of Melrose Partners. Accounting methods have changed from previous years.



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45	<b>Eberspaecher Gruppe</b> (49) 711-939-00; eberspaecher.com	Eberspaecherstrasse 24, Esslingen, Baden-Wuerttemberg, 73730, Germany	Heinrich Baumann, COO & Martin Peters, CFO & managing partners	\$5,445 f	\$4,948 f	23	66	11	–	Silencers, catalytic converters, particulate filters, manifolds, vehicle heaters, electrical vehicle heaters & electronics	47
46	<b>Hanon Systems</b> (82) 42-930-6114; hanonsystems.com	95, Sinilseo-ro, Daedeok-gu Daejeon, Korea	Jay Son president & CEO	5,396	4,939	24	33	42	1	Thermal & energy management, heating ventilation & air conditioning, powertrain cooling, compressors, fluid transport, thermal & emissions solutions	48
47	<b>Mando Corp.</b> (82) 61-6480-6114; mando.com	32, Hamanho-gil, Poseung-eup, Pyeongtaek-si, Gyeonggi-do, 451-821, South Korea	M. W. Chung chairman	5,219	5,175	16	3	72	9	Brakes, steering, suspension, radar, camera, ultrasonic, chargers & components & advanced highly automated driving chassis systems	46
48	<b>Draexlmaier Group</b> (49) 8741-47-0; draexlmaier.com	Landshuter Strasse 100 Vilsbiburg, Bavaria, 84137, Germany	Juergen Otto CEO	5,060 e	4,633 e	21	–	–	–	Electrical systems, electrical & electronic components, interiors, system assembly & battery systems	51
49	<b>NSK</b> (81) 3-3779-7111; nsk.com	Nissei Bldg., 1-6-3 Ohsaki, Shinagawa-ku Tokyo, 141-8560, Japan	Toshihiro Uchiyama president & CEO	5,010 fe	5,610 fe	15	13	71	1	Bearings, hub bearings, steering columns, electric power steering & automatic transmission products	44
50	<b>Freudenberg Group</b> (49) 6201-80-0; freudenberg.com	Hoehnerweg 2-4 Weinheim, 69469, Germany	Mohsen Sohi CEO, speaker of the management board	4,906	4,782	26	48	21	5	Seals, precision molded components, vibration control, filtration, automotive interior, lubricants & release agents	50
51	<b>NTN Corp.</b> (81) 6-6443-5001; ntn.co.jp	3-17, 1-chome, Kyomachibori, Nishi-ku Osaka, 550-0003, Japan	Hiroshi Ohkubo chairman & CEO	4,725 fe	4,860 fe	28	22	49	1	Automotive constant velocity joints, axle bearings, needle roller bearings, tapered roller bearings & intelligent in-wheel parts for EVs	49
52	<b>Nemak</b> (52) 81-8748-5200; nemak.com	Libramiento Arco Vial Km. 6.8 Garcia, NL, 66000, Mexico	Armando Tamez CEO	4,704 f	4,481	56	35	6	4	Powertrain, structural & EV components	52
53	<b>TS Tech Co.</b> (81) 48-462-1121; tstech.co.jp	3-7-27 Sakae-cho Asaka-shi, Saitama-ken, 351-0012, Japan	Michio Inoue chairman	4,440 f	4,258 f	47	–	–	53	Seats & door liners	55
54	<b>Infineon Technologies</b> (49) 89-234-0; infineon.com	Am Campeon 1-15 Neubiberg, 85579, Germany	Reinhard Ploss CEO	4,210	3,727	16	39	40	5	Microcontrollers, intelligent sensors; power semiconductors & power modules for powertrain (combustion, hybrid, electric); safety; security & body & convenience applications	64
55	<b>Tokai Rika Co.</b> (81) 587-95-5211; tokai-rika.co.jp	3-260 Toyota, Oguchi-Cho Niwa-gun, Aichi, 480-0195, Japan	Kenji Miura president	4,187 fe	4,037 f	21	5	73	1	Switches, heater control panels, gear shifters, key cylinder & lock sets, seat belts, outer door mirrors & immobilizer systems	54
56	<b>IAC Group</b> (35) 2-267504-0; iacgroup.com	4 rue Lou Hemmer Findel, L-1748, Luxembourg	Manfred Gingl CEO	4,122	4,400	45	49	6	-	Cockpits including instrument panels, consoles, doors, headliners & overhead systems	53
57	<b>Linamar Corp.</b> (519) 836-7550; linamar.com	287 Speedvale Ave. W. Guelph, Ontario, N1H 1C5, Canada	Linda Hasenfratz CEO	4,068	3,812	55	33	9	3	Camshafts, connecting rods, cylinder heads & blocks, balance shafts, fuel rails, transmission gears, differentials, clutch modules, all-wheel-drive systems & e-axes	62
58	<b>Webasto</b> (49) 89-857-940; webasto-group.com	Kraillinger Strasse 5 Stockdorf, Bavaria, 82131, Germany	Holger Engelmann chairman of the management board	4,049 fe	3,865 fe	17	41	42	–	Sunroofs, panorama roof systems, convertible roof systems & parking heaters	61
59	<b>TI Fluid Systems</b> (44) 1865 871820; tifs.com	4650 Kingsgate Oxford, OX4 2SU, UK	Bill Kozyra president & CEO	3,983 e	4,193 e	28	40	30	2	Automotive fluid systems technology	56
60	<b>Nexteer Automotive</b> (248) 340-8200; nexteer.com	1272 Doris Road Auburn Hills, MI 48326, USA	Guibin Zhao CEO	3,912	3,878	67	13	20	–	Electric power steering, hydraulic power steering, steering columns & halfshafts	60
61	<b>BHAP</b> (86) 10 63173722; bhap.com.cn	Beijing Motor Tower, No. 25, E. 3rd Ring S. Road, Beijing, 100021, China	Bao Chen president & CEO	3,869 f	3,700 f	15	14	71	–	Body systems, interior systems, exterior chassis systems, electronic parts systems & seat systems	65
62	<b>Delphi Technologies</b> (44) 020-305-74300; delphi.com	1 Angel Court London, EC2R 7HJ, UK	Rick Dauch CEO	3,863 e	3,902	30	43	25	2	Powertrain & aftermarket parts	58
63	<b>Federal-Mogul*</b> (248) 354-7700; federalmogul.com	27300 W. 11 Mile Road Southfield, MI 48034, USA	Roger Wood & Brian Kessler co-CEOs	3,786	5,650	43	37	11	9	Pistons, rings, cylinder liners, spark plugs, bearings, valvetrain products, gaskets, seals, heat shields, brake materials, wipers, fuel pumps	43
64	<b>Cooper-Standard Automotive</b> (34) 596-5900; cooperstandard.com	39550 Orchard Hill Place Drive Novi, MI 48375, USA	Jeffrey Edwards chairman & CEO	3,629 f	3,618 f	53	28	16	3	Systems & components, rubber & plastic sealing, fuel & brake lines, fluid transfer hoses & anti-vibration systems	66
65	<b>CITIC Dicastal Co.</b> (86) 335-5358548; dicastal.com	No.185 Longhai Road Qinhuangdao, Hebei, 066011, China	Zuo Xu chairman	3,580 f	3,052 f	26	18	55	1	Aluminum alloy wheels & aluminum casting parts	71
66	<b>CIE Automotive</b> (34) 94-605-62-00; cieautomotive.com	Alameda Mazarredo 69- 8C Bilbao, Vizcaya, 48009, Spain	Jesus Maria Herrera CEO	3,578	3,256	25	46	18	11	Engine & powertrain components, chassis & steering components, exterior & interior trim & roof systems components	68
67	<b>NHK Spring Co.</b> (81) 45-786-7511; nhkspg.co.jp	3-10 Fukuura, Kanazawa-ku Yokohama, 236-0004, Japan	Kazumi Tamamura chairman	3,431 fe	3,479 fe	11	4	85	–	Stabilizer bars, coil springs & seats & valve springs	67
68	<b>Garrett Motion Inc.</b> (41) 21 695 30 00; garrettmotion.com	Z.A. La Piece 16 Rolle, VD, 1180, Switzerland	Olivier Rabiller president & CEO	3,375	3,096	21	56	23	–	Turbochargers, e-compressors, e-turbos & fuel cell compressors; software solutions covering controls & prognostic integrated vehicle health mgmt.	–

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

\*Tenneco acquired Federal-Mogul in Oct. 2018. Sales listed are for Jan. - Sept. 2018.

# Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Executive	Total global OEM automotive parts sales (dollars in millions) 2018	Total global OEM automotive parts sales (dollars in millions) 2017	Percent North America 2018	Percent Europe 2018	Percent Asia 2018	Percent rest of world 2018	Products	2017 rank
69	<b>DuPont, Transportation &amp; Industry</b> (302) 774-1000; dupont.com	974 Centre Wilmington, DE 19805, USA	Randy Stone business president	\$3,200 e	\$1,839 f	24	29	41	6	Engineered polymers, glass bonding adhesives, structural adhesives, lubricants, fluids & silicones	88
70	<b>Mitsuba Corp.</b> (81) 277-52-0111; mitsuba.co.jp	2681, 1-Chome, Hirosawa-Cho, Kiryu, Gunma Prefecture, 376-8555, Japan	Yuichi Nagase president	3,162 fe	3,033 fe	28	5	67	–	Wiper systems, power window motors, starter motors, fan motors, seat motors, sunroof motors, power slide door assemblies, power tailgate systems & electric power steering motor	70
71	<b>Flex</b> (408) 576-7000; flex.com	6201 America Center Drive San Jose, CA 95002, USA	Revathi Advaiti CEO	3,000 f	2,400 f	50	25	24	1	Autonomy, connectivity, electrification & smart tech	73
72	<b>Visteon Corp.</b> (800) 847-8366; visteon.com	One Village Center Drive Van Buren Township, MI 48111, USA	Sachin Lawande president & CEO	2,984	3,146	24	33	41	2	Cockpit electronics: instrument clusters, head-up & information displays, infotainment, connected audio & connectivity & telematics	69
73	<b>Novelis Inc.</b> (404) 760-4000; novelis.com	3560 Lenox Road N.E., Ste. 2000 Atlanta, GA 30326, USA	Steve Fisher president & CEO	2,947 fe	2,776 fe	56	36	8	–	Flat-rolled aluminum sheet for vehicle structures, body panels, heat exchangers, heat shields & other automotive applications	76
74	<b>Leopold Kostal</b> (49) 2351-16-0; kostal.com	An der Bellmerlei 10 Luedenscheid, NRW, 58513, Germany	Andreas Kostal chairman	2,884	2,828	15	52	30	3	Steering column & center console modules, driver assistance, body network controls, interior controls, power application control units, roof modules & switch panels	75
75	<b>Asahi Glass Co.</b> (81) 3-3218-5555; agc-automotive.com	1-5-1, Marunouchi, Chiyoda-ku Tokyo, 100-8405, Japan	Takuya Shimamura representative director, president & CEO	2,883 fe	2,775 fe	16	31	51	2	Glazing systems	77
76	<b>Piston Group</b> (313) 541-8674; pistongroup.com	3000 Town Center #3250 Southfield, MI 48075, USA	Vinnie Johnson founder, chairman & CEO	2,844 f	1,665 f	100	–	–	–	Electric batteries, cooling modules, brake corners, grille & shock assemblies, instrument panels, seat trim, sun visors, armrests/bolsters, shades, injection molding & brazed evaporator heater cores	93
77	<b>Inteva Products</b> (248) 655-8886; intevaproducts.com	1401 Crooks Road Troy, MI 48084, USA	Lon Offenbacher president & CEO	2,800 f	2,500 f	30	30	40	–	Closure systems, interior systems, roof systems, motors & electronic systems	78
78	<b>Martinrea International Inc.</b> (416) 749-0314; martinrea.com	3210 Langstaff Road Vaughan, Ontario, L4K 5B2, Canada	Pat D'Eramo president & CEO	2,724	2,936	77	19	–	4	Steel & aluminum body, chassis & engine components; fluid handling components & assemblies & modules	72
79	<b>Sumitomo Riko Co.</b> (81) 568-77-2121; tokai.co.jp	3-1 Higashi, Komaki Komaki City, Aichi, 485-8550, Japan	Yoshiaki Nishimura chairman, CEO & representative director	2,566 fe	3,750 fe	31	18	50	1	Anti-vibration molded rubber & fuel delivery systems	63
80	<b>Johnson Electric Group</b> (852) 2663-6688; johnsonelectric.com	6/F, 12 Science Park E. Ave., Hong Kong Science Park, Shatin, NT, Hong Kong, China	Patrick Wang CEO	2,541 f	2,494 f	30	34	36	–	Cooling fan modules, engine & transmission oil pumps, engine actuators & valves, power steering motors, HVAC & lighting actuators, electric motors, switches, solenoids & flexible PCBs	79
81	<b>Kautex Textron</b> (49) 228-488-0; kautex.com	Kautexstr. 52 Bonn, D-53229, Germany	Joerg Rautenstrauch president & CEO	2,285 e	2,230 e	44	44	12	–	Fuel tank systems, clear vision systems, selective catalytic reduction systems, camshafts & packaging	82
82	<b>Autoneum</b> (41) 52-244-82-82; autoneum.com	Schlossalstrasse 43 8406 Winterthur, Switzerland	Martin Hirzel CEO	2,236 f	2,183 f	41	43	11	5	Engine covers, dashes, carpets, floor insulators, floor mats, underbody shields, floor pans, heat shields, wheelhouse liners, dampers, stiffeners & acoustic parts	81
83	<b>F-Tech Inc.</b> (81) 480-85-7236; ftech.co.jp	19 Showanuma Shobumachi Minami Saitama-gun, Saitama Prefecture, 346-0194, Japan	Fukuda Yuichi president	2,119 f	2,042 f	58	–	42	–	Chassis, suspension systems, control arms, pedal assemblies & hydroforming	83
84	<b>Arconic Inc.</b> (412) 553-4545; arconic.com	201 Isabella St. Pittsburgh, PA 15212, USA	John Plant chairman & CEO	2,100 e	1,690 e	85	15	–	–	Aluminum sheet for closure panels, hoods & trunks, bumper systems & crash management systems; extrusions for drive shafts	–
85	<b>Bridgewater Interiors</b> (313) 842-3300; bridgewater-interiors.com	4617 W. Fort St. Detroit, MI 48209, USA	Ronald Hall president & CEO	1,969 f	2,010 f	100	–	–	–	Automotive seating systems	84
86	<b>Minth Group</b> (86) 573-83685960; minth.com.cn	No.1 Yazhong Road, Asia Pacific Industrial Park, Nanhu District, Jiaxing, Zhejiang, 314006, China	Jonghwa Chin chairman	1,902	1,750	19	15	66	–	Trims, body structural parts, decorative parts, roof racks, seating systems & battery housings	92
87	<b>SEG Automotive</b> (49) 711-4009 8000; seg-automotive.com	Lotterbergstrasse 30, Stuttgart, Baden-Wuerttemberg, 70499, Germany	Ulrich Kirschner CEO & CFO	1,867	1,817	8	48	36	8	Alternators (generators), starters & boost recuperation machines	–
88	<b>Ryobi</b> (81) 847-41-1341; ryobi.com	762 Mesaki-cho, Fuchu-shi, Hiroshima-ken, 726-8628, Japan	Hiroshi Urakami chairman & CEO	1,848 f	1,805 fe	24	8	68	–	Aluminum high-pressure die castings powertrain & structural components	90
89	<b>Wuling Industry</b> (86) 0772-3755060; wuling.com.cn	No.18 Hexi Road Liuzhou, Guangxi, 545007, China	Zhijun Yuan president	1,812 f	2,324 f	–	–	100	–	Chassis, interior & exterior trim parts & engines	80
90	<b>Gentex Corp.</b> (616) 772-1800; gentex.com	600 N. Centennial St. Zeeland, MI 49464, USA	Steve Downing president & CEO	1,791 f	1,758 f	31	45	24	–	Interior & exterior auto-dimming rearview mirrors, SmartBeam advanced lighting-assist, rear camera displays, compasses, LED turn signals, side blind-zone indicators & driver assist features	91

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# Top 100 global OEM parts suppliers – Ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Executive	Total global OEM automotive parts sales (dollars in millions) 2018	Total global OEM automotive parts sales (dollars in millions) 2017	Percent North America 2018	Percent Europe 2018	Percent Asia 2018	Percent rest of world 2018	Products	2017 rank
91	<b>Hyundai Kefico Corp.</b> (82) 31-450-9015; hyundai-kefico.com	102 Gosan-ro, Gunpo-si Gyeonggi-Do, Korea	ChangSeob Bang CEO	\$1,754	\$1,553	12	15	61	12	Automotive electronic management systems-control units, sensors, actuators & modules	96
92	<b>Anhui Zhongding Sealing Parts Co.</b> (86) 563 4181887; zhongdinggroup.com	Economic & Technical Development Zone Ningguo, Anhui, 242300, China	Dinghu Xia chairman	1,714	1,620	17	45	37	1	Sealing parts & rubber products	–
93	<b>Multimatic Inc.</b> (905) 470-9149; multimatic.com	8688 Woodbine Ave. Markham, Ontario, L3R 8B9, Canada	Peter Czapka CEO	1,650 e	1,390 e	88	9	2	1	Hinge systems, stamped welded assemblies & suspension systems	99
94	<b>Constellium</b> (31) 20 654 9780; constellium.com	Tupolevlaan 41-61 Schiphol-Rijk, 1119 NW, Netherlands	Jean-Marc Germain CEO	1,595	1,237	20	77	3	–	Aluminum crash management systems; body structure components – battery enclosures; aluminum flat rolled coils & sheets for body panels; heat exchangers & decorative solutions; aluminum profiles for ABS	–
95	<b>Tower International</b> (248) 675-6000; towerinternational.com	17672 N. Laurel Park Drive, Ste. 400E Livonia, MI 48152, USA	Jim Gouin CEO	1,571 f	1,988 f	97	–	–	3	Body structures & assemblies, lower vehicle frames & structures, chassis modules & systems & suspension components	86
96	<b>Preh</b> (49) 9771 92-0; preh.com	Schweinfurter Strasse 5-9, Bad Neustadt a.d., Saale, Bavaria, 97616, Germany	Christoph Hummel president & CEO	1,556	1,460	14	74	12	–	Climate controls, central controllers, ECUs, switches, sensors, HMI systems, navigation & telematics systems; battery management systems	97
97	<b>Dura Automotive Systems</b> (248) 299-7500; durauto.com	1780 Pond Run Auburn Hills, MI 48326, USA	Lynn Tilton CEO	1,400 fe	1,430 f	42	52	5	1	Mechatronic controls, shift-by-wire systems; electronics, actuators & advanced driver assist systems; lightweight structural body systems & exterior trim	98
98	<b>Omron Corp.</b> (81) 568-78-6181; omronauto.com	6368 Nenryo-zaka, Okusa Komaki-city, Aichi, 485-0802, Japan	Katsuhiko Wada managing officer, president & CEO	1,359 f	1,388 f	28	6	65	2	Electronic control units, keyless entry, switches, closure controls, relays & electronic power steering	100
99	<b>Auria</b> (248) 728-8000; auriasolutions.com	26999 Central Park Blvd., Ste 300 Southfield, MI 48076, USA	Brian Pour president & CEO	1,100	1,100	52	45	–	3	Flooring, acoustical, thermal products & fiber-based components	–
100	<b>Henniges Automotive</b> (248) 340-4100; hennigesautomotive.com	2750 High Meadow Circle Auburn Hills, MI 48326, USA	Larry Williams president & CEO	1,076	994	68	17	15	–	Weather seals & anti-vibration products	–

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# Top 50 suppliers – The largest suppliers to Europe, ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Top executive	Total Europe OEM automotive parts sales (dollars in millions) 2018	Total Europe OEM automotive parts sales (dollars in millions) 2017	Total global OEM automotive parts sales (dollars in millions) 2018	Total global OEM automotive parts sales (dollars in millions) 2017	Products	2017 rank
1	<b>Robert Bosch</b> (49) 711-811-0; bosch.com	Postfach 106050 Stuttgart, D-70049, Germany	Volkmar Denner chairman	\$22,286 f	\$21,375 f	\$49,525 f	\$47,500 f	Powertrain solutions; chassis systems controls; electrical drives, car multimedia, electronics, steering systems & battery technology	1
2	<b>Continental</b> (49) 511-938-01; continental.com	Vahrenwalder Strasse 9 Hanover, 30165, Germany	Elmar Degenhart CEO	18,901 f	17,596 f	37,803 f	35,910 f	Advanced driver assistance systems, electronic brakes; stability management, tires, foundation brakes, chassis systems, safety electronics, telematics, powertrain electronics, injection systems & turbochargers	2
3	<b>ZF Friedrichshafen</b> (49) 7541-77-0; zf.com	Graf-von-Soden-Platz 1 Friedrichshafen, Baden- Wuerttemberg 88046, Germany	Wolf-Henning Scheider CEO	17,357 f	16,551	36,929 f	34,481	Transmissions, chassis components & systems, steering systems, braking systems, clutches, dampers, active & passive safety systems, driver assist systems including camera, radar & lidar	3
4	<b>Magna International Inc.</b> (905) 726-2462; magna.com	337 Magna Drive Aurora, Ontario L4G 7K1, Canada	Donald Walker CEO	17,147	13,903	40,827	36,588	Body exteriors & structures; power & vision technologies; seating systems & complete vehicle solutions	4
5	<b>Faurecia</b> (33) 1-72-36-70-00; faurecia.com	2 Rue Hennape Nanterre, 92735, France	Patrick Koller CEO	10,540	9,585	20,667	19,170	Faurecia seating & interiors; Faurecia Clarion Electronics & Faurecia clean mobility	5
6	<b>Thyssenkrupp</b> (49) 201-8440; thyssenkrupp.com	thyssenkrupp Allee 1 Essen, NRW 45143, Germany	Guido Kerkhoff CEO	9,374 f	8,083 f	14,438 f	12,518 f	Steering, dampers, springs & stabilizers, camshafts, forged machined components, bearings, undercarriage components, axles, forged crankshafts & drivetrain components, high-strength lightweight steels & electrical steel	8
7	<b>Valeo</b> (33) 1-40-55-20-20; valeo.com	43 Rue Bayen Paris, 75017, France	Jacques Aschenbroich chairman & CEO	9,054 f	9,099 f	19,683 f	19,360 f	Micro hybrid systems, electrical & electronic systems, thermal systems, transmissions, wiper systems, camera/sensor technology, security systems, interior controls	6
8	<b>Lear Corp.</b> (248) 447-1500; lear.com	21557 Telegraph Road Southfield, MI 48033, USA	Raymond Scott president & CEO	8,671	8,187	21,149	20,467	Seating & electrical systems (e-systems)	7
9	<b>Mahle</b> (49) 711-501-0; mahle.com	Pragstrasse 26-46 Stuttgart, 70376, Germany	Joerg Stratmann chairman & CEO	6,914 f	6,932 f	14,405 f	14,441 f	Piston systems, cylinders, valvetrains, alternators, air & liquid management systems, vehicle climatization, engine & powertrain cooling, battery cooling, actuators, electric drives & starters	9
10	<b>Gestamp</b> (34) 91-379-19-99; gestamp.com	Alfonso XII, 16 Madrid 28014, Spain	Francisco J. Riberas executive chairman	6,260	5,743	10,096	9,263	Metal components & assemblies, body-in-white, chassis & mechanisms	10
11	<b>Samvardhana Motherson Group</b> (91) 120-6679551; motherson.com	Plot No. 1, Sector 127, Noida - Greater Noida Expy., Noida, U.P. 201301, India	Vivek Chaand Sehgal chairman	5,871 fe	5,296 fe	11,765 fe	10,550 fe	Rearview mirrors, plastic modules cockpits/IPs, door trims & bumpers, wiring harnesses, plastic parts, rubber components, lighting, air intake manifolds, pedals, shock absorbers, HVAC systems & roof hatches	14
12	<b>BASF</b> (49) 621-60-0; basf.com	Carl-Bosch-Strasse 38 Ludwigshafen, 67056, Germany	Martin Brudermueller chairman of the board of executive directors	5,431	5,471	12,931 f	12,157 f	Coatings, catalysts, engineering plastics, polyurethanes, coolants, brake fluids, lubricants, battery materials	12
13	<b>Plastic Omnium Co.</b> (33) 1-40-87-64-00; plasticomnium.com	1 allée Pierre Burelle Levallois Cedex, 92533, France	Laurent Burelle chairman & CEO	5,357	5,182	9,740	9,596	Fascias, front-end modules, rear-end modules, fenders, body panels & fuel systems	15
14	<b>Denso Corp.</b> (81) 566-25-5511; denso.com	1-1 Showo-cho Kariya-Aichi, 448-8661, Japan	Koji Arima president & CEO	5,052 fe	5,140 fe	42,793 fe	40,782 fe	Thermal, powertrain control, electronic & electric systems; small motors, telecommunications	16
15	<b>Magnetit Marelli</b> (39) 02-972-27-111; magnetimarelli.com	Viale Aldo Borletti 61/63 Corbetta, Milan 20011, Italy	Ermanno Ferrari CEO	5,030 f	5,642 f	8,702 f	9,234 f	Lighting, powertrain, electronics, suspensions systems, shock absorbers, exhaust systems & plastic parts	11
16	<b>Schaeffler</b> (49) 9132-82-0; schaeffler.com	Industriestrasse 1-3, Herzogenaurach, Bavaria 91074, Germany	Klaus Rosenfeld CEO	5,026 e	5,399 e	10,052 e	10,798 e	Anti-friction bearings; engine, chassis & transmission components, wheel & axle bearings, clutch & transmission systems, dampers & e-mobility products	13
17	<b>Benteler Automotive</b> (49) 5254-81-0; benteler.com	An der Talle 27-31 Paderborn, 33102, Germany	Ralf Goettel CEO	4,917	4,596	8,060	7,790	Components & modules for chassis, body-in-white & engine & exhaust applications & modular e-mobility system solutions	-
18	<b>Adient</b> (734) 254-5000; adient.com	49200 Halyard Drive Plymouth, MI 48170, USA	Doug Del Grosso president & CEO	4,698	4,212	17,400	16,200	Seating & seating systems & components	17
19	<b>HELLA GmbH &amp; Co.</b> (49) 2941-38-0; hellacom	Rixbecker Str. 75 Lippstadt, 59552, Germany	Rolf Breidenbach president & CEO	4,489 fe	4,270 fe	6,801 f	6,280 f	Electronic & lighting components & systems	27
20	<b>BorgWarner Inc.</b> (248) 754-9200; borgwarner.com	3850 Hamlin Road Auburn Hills, MI 48326, USA	Frederic Lissalde president & CEO	4,001 f	3,724 f	10,530	9,800	Turbochargers, electric motors, electronic control units, engine valve-timing, ignition systems, thermal systems, transmission-clutch systems, transmission-control & torque management systems	20
21	<b>Aptiv</b> (44) 163-423-4422; aptiv.com	5 Hanover, Grand Canal Dock Dublin, Leinster, Ireland	Kevin Clark president & CEO	3,989	3,768	12,869	11,776	Electrical & wiring products, body controls, infotainment, safety & autonomous driving technologies	18
22	<b>Tenneco Inc.*</b> (847) 482-5000; tenneco.com	500 N. Field Drive Lake Forest, IL 60045, USA	Brian Kesseler co-CEO	3,700	2,808	10,001	8,023	Emission control systems, manifolds, catalytic converters, diesel aftertreatment systems, catalytic reduction mufflers, shock absorbers, struts, electronic suspension products & systems	28
23	<b>Brose Fahrzeugteile</b> (49) 9561-21-0; brose.com	Max-Brose-Str. 1, Coburg, 96450, Germany	Kurt Sauernheimer CEO	3,670	3,757	7,340	7,089	Mechatronic systems for vehicle doors & seats as well as electric & electronic parts for steering, brakes, transmissions & engine cooling	19
24	<b>Eberspaecher Gruppe</b> (49) 711-939-00; eberspaecher.com	Eberspaecherstrasse 24, Esslingen, Baden-Wuerttemberg 73730, Germany	Heinrich Baumann, COO & Martin Peters, CFO & managing partners	3,594 f	3,563	5,445 f	4,948 f	Silencers, catalytic converters, particulate filters, manifolds, vehicle heaters, electrical vehicle heaters & electronics	21
25	<b>Aisin Seiki Co.</b> (81) 566-24-8441; aisin.co.jp	2-1 Asahi-Machi Kariya, Aichi 448-8650, Japan	Kanshiro Toyoda chairman	3,290 f	3,282	34,999 f	33,837 f	Body, brake & chassis systems, electronics, drivetrain & engine components	24

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

\*Tenneco acquired Federal-Mogul in Oct. 2018. Sales listed include Federal Mogul's for Oct. - Dec. 2018.

# Top 50 suppliers – The largest suppliers to Europe, ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Top executive	Total Europe OEM automotive parts sales (dollars in millions) 2018	Total Europe OEM automotive parts sales (dollars in millions) 2017	Total global OEM automotive parts sales (dollars in millions) 2018	Total global OEM automotive parts sales (dollars in millions) 2017	Products	2017 rank
26	<b>Grupo Antolin</b> (34) 947-47-7700; grupoantolin.com	Ctra. Madrid-Irun Km. 244'8 Burgos, E09007, Spain	Ernesto Antolin chairman	\$3,230	\$3,438	\$6,408	\$6,367	Overhead systems, door modules & panels, window regulators, interior & exterior lighting & cockpits	26
27	<b>Yazaki Corp.</b> (81) 0559-65-3002; yazaki-group.com	1500 Mishuku, Susono City, Shizuoka Prefecture 410-1194, Japan	Shinji Yazaki president	3,010 fe	2,678 fe	17,500 fe	15,754 fe	Wiring harnesses, connectors, junction boxes, power distribution boxes, instrumentation & high voltage systems	29
28	<b>Panasonic Automotive Systems Co.</b> (81) 6-6908-1121; panasonic.net	1006, Oaza Kadoma Kadoma City, Osaka 571-8501, Japan	Kazuhiro Tsuga president	2,795 f	2,099 fe	17,466 f	14,995 fe	Premium audio systems, navigation systems, compressors, batteries, motors, monitors, sensors; switches & HUDs	32
29	<b>Autoliv Inc.</b> (46) 8-587-20-600; autoliv.com	Klarabergsviadukten 70, Section B, 7th Fl. Stockholm, SE-107 24, Sweden	Mikael Bratt president & CEO	2,690	3,120	8,678	10,400	Airbags, seat belts, steering wheels & safety electronics	25
30	<b>Dana Inc.</b> (419) 887-3000; dana.com	3939 Technology Drive Maumee, OH 43537, USA	James Kamsickas president & CEO	2,524 f	2,163 f	8,143 f	7,209 f	Axles, driveshafts, sealing & thermal management products	31
31	<b>Hyundai Mobis</b> (82) 2-2018-5114; mobis.co.kr	203 Teheran-ro, Gangnam-gu Seoul, 06141, Korea	Chung Kook Park CEO	2,383	3,540	25,624	24,984	Automotive electronics, infotainment, ADAS, EV systems, module systems, lighting, airbags & brakes	22
32	<b>Freudenberg Group</b> (49) 6201-80-0; freudenberg.com	Hoehnerweg 2-4 Weinheim, 69469, Germany	Mohsen Sohi CEO & speaker of the management board	2,355	2,056 e	4,906	4,782	Seals, precision molded components, vibration control, filtration, automotive interior, lubricants & release agents	33
33	<b>GKN Automotive</b> (44) 1527-517-715; gkn.com	50 Pall Mall, St. James's, London SW1Y 5JH, UK	Liam Butterworth CEO	2,322	3,413	6,450	8,751	Driveline halfshafts, driveshafts, e-drive & awd systems	23
34	<b>JTEKT Corp.</b> (81) 52-527-1900; jtekt.co.jp	15th Fl., Midland Square, 4-7-1 Meieki Nakamura-ku, Nagoya 450-8515, Japan	Tetsuo Agata president	2,092	2,033 f	13,078	12,709	Bearings, steering systems, driveline systems & machine tools	34
35	<b>IAC Group</b> (35) 2-267504-0; iacgroup.com	4 rue Lou Hemmer Findel, L-1748, Luxembourg	Manfred Gingl CEO	2,020	1,936	4,122	4,400	Cockpits including instrument panels, consoles, doors, headliners & overhead systems	35
36	<b>Garrett Motion Inc.</b> (41) 21 695 30 00; garrettmotion.com	Z.A. La Piece 16 Rolle, VD 1180, Switzerland	Olivier Rabiller president & CEO	1,890 e	1,703 e	3,375	3,096	Turbochargers & high speed aerodynamic engine devices; electric boosting products – covering e-compressors, e-turbos & fuel cell solutions covering controls & prognostic integrated vehicle health management & cybersecurity	–
37	<b>Yanfeng</b> (86) 21-333-81000; yanfengco.com	399 Liuzhou Road Shanghai, 200235, China	Jianxu Jia general manager	1,791	1,658	14,506	14,278	Interiors, exteriors, electronics, seating & safety	39
38	<b>Hanon Systems</b> (82) 42-930-6114; hanonsystems.com	95, Sinilseo-ro, Daedeok-gu Daejeon, Korea	Jay Son president & CEO	1,781	1,334	5,396	4,939	Thermal & energy management, heating ventilation & air conditioning, powertrain cooling, compressors, fluid transport, thermal & emissions solutions	47
39	<b>Delphi Technologies</b> (44) 020-305-74300; delphi.com	1 Angel Court London, EC2R 7HJ, UK	Rick Dauch CEO	1,673 e	1,639	3,863 e	3,902	Powertrain & aftermarket parts	40
40	<b>Webasto</b> (49) 89-857-940; webasto-group.com	Kraillinger Strasse 5 Stockdorf, Bavaria 82131, Germany	Holger Engelmann chairman of the management board	1,660 fe	1,585 fe	4,049 fe	3,865 fe	Sunroofs, panorama roof systems, convertible roof systems & parking heaters	41
41	<b>CIE Automotive</b> (34) 94-605-62-00; cieautomotive.com	Alameda Mazarredo 69- 8C Bilbao, Vizcaya 48009, Spain	Jesus Maria Herrera CEO	1,657	1,557	3,578	3,256	Engine & powertrain components, chassis & steering components, exterior & interior trim & roof systems components	43
42	<b>Infineon Technologies</b> (49) 89-234-0; infineon.com	Am Campeon 1-15 Neubiberg, 85579, Germany	Reinhard Ploss CEO	1,642	1,416	4,210	3,727	Microcontrollers, intelligent sensors; power semiconductors & power modules for powertrain (combustion, hybrid, electric); safety; security & body & convenience applications	45
42	<b>Nemak</b> (52) 81-8748-5200; nemak.com	Libramiento Arco Vial Km. 6.8 Garcia, NL 66000, Mexico	Armando Tamez CEO	1,642	1,567	4,704 f	4,481	Powertrain, structural & EV components	42
44	<b>TI Fluid Systems</b> (44) 1865-871820; tifs.com	4650 Kingsgate Oxford, OX4 2SU, UK	Bill Kozyra president & CEO	1,605 e	1,669 e	3,983 e	4,193 e	Automotive fluid systems technology	38
45	<b>Flex-N-Gate Corp.</b> (217) 278-2600; flex-n-gate.com	1306 E. University Ave. Urbana, IL 61802, USA	Shahid Khan chairman & CEO	1,502	1,359	8,343	7,551	Interior & exterior plastics, metal bumpers & hitches, structural metal assemblies, forward & signal lighting, mechanical	46
46	<b>Leopold Kostal</b> (49) 2351-16-0; kostal.com	Am der Bellmerlei 10 Luedenscheid, NRW 58513, Germany	Andreas Kostal chairman	1,500	1,471 fe	2,884	2,828	Steering column & center console modules, driver assistance, body network controls, interior controls, power application control units, roof modules & switch panels	44
47	<b>Federal-Mogul*</b> (248) 354-7700; federalmogul.com	27300 W. 11 Mile Road Southfield, MI 48034, USA	Roger Wood & Brian Kessler co-CEOs	1,401 fe	2,486	3,786	5,650	Pistons, rings, cylinder liners, spark plugs, bearings, valvetrain products, gaskets, seals, heat shields, brake materials, wipers, fuel pumps	30
48	<b>Linamar Corp.</b> (519) 836-7550; linamar.com	287 Speedvale Ave. W. Guelph, Ontario N1H 1C5, Canada	Linda Hasenfratz CEO	1,334	1,193	4,068	3,812	Camshafts, connecting rods, cylinder heads & blocks, balance shafts, fuel rails, transmission gears, differentials, clutch modules, all-wheel-drive systems & e-Axles	48
49	<b>Constellium</b> (31) 20-654-9780; constellium.com	Tupolevlaan 41-61 Schiphol-Rijk, 1119 NW, Netherlands	Jean-Marc Germain CEO	1,228	990	1,595	1,237	Aluminum crash management systems; body structure components & battery enclosures; aluminum flat rolled coils & sheets for body panels; heat exchangers & decorative solutions; aluminum profiles for ABS	–
50	<b>Preh</b> (49) 9771 92-0; preh.com	Schweinfurter Strasse 5-9, Bad Neustadt a.d. Saale, Bavaria 97616, Germany	Christoph Hummel president & CEO	1,152	1,022	1,556	1,460	Climate controls, central controllers, ECUs, switches, sensors, HMI systems, navigation & telematics systems; battery management systems	–

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

\*Tenneco acquired Federal-Mogul in Oct. 2018. Sales listed are for Jan. - Sept. 2018.

# Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2018	Total North America OEM automotive parts sales (dollars in millions) 2017	Total global OEM automotive parts sales (dollars in millions) 2018	Total global OEM automotive parts sales (dollars in millions) 2017	Products	2017 rank
1	<b>Magna International Inc.</b> (905) 726-2462; magna.com	337 Magna Drive Aurora, Ontario L4G 7K1, Canada	Donald Walker CEO	\$20,414	\$19,758	\$40,827	\$36,588	Body exteriors & structures; power & vision technologies; seating systems & complete vehicle solutions	1
2	<b>Continental Automotive Systems U.S. Inc.</b> (248) 393-5300; continental.com	One Continental Drive Auburn Hills, MI 48326, USA	Samir Salman CEO	10,585 f	8,978 f	37,803 f	35,910 f	Advanced driver assistance systems, electronic brakes; stability management, tires, foundation brakes, chassis systems, safety electronics, telematics, powertrain electronics, injection systems & turbochargers	4
3	<b>ZF North America Inc.</b> (734) 855-2600; zf.com	12001 Tech Center Drive Livonia, MI 48150, USA	Franz Kleiner member, board of management	10,340 f	9,310	36,929 f	34,481	Transmissions, chassis components & systems, steering systems, braking systems, clutches, dampers, active & passive safety systems, driver assist systems including camera, radar & lidar	2
4	<b>Denso International America Inc.</b> (248) 350-7500; densocorp-na.com	24777 Denso Drive, P.O. Box 5133 Southfield, MI 48086, USA	Kenichiro Ito chairman & CEO	9,800 fe	9,307 fe	42,793 fe	40,782 fe	Thermal, powertrain control, electronic & electric systems; small motors, telecommunications	3
5	<b>Robert Bosch</b> (248) 876-1000; boschusa.com	38000 Hills Tech Drive Farmington Hills, MI 48331, USA	Mike Mansuetti president	8,419 f	7,600 f	49,525 f	47,500 f	Powertrain solutions; chassis systems controls; electrical drives, car multimedia, electronics, steering systems & battery technology	6
6	<b>Lear Corp.</b> (248) 447-1500; lear.com	21557 Telegraph Road Southfield, MI 48033, USA	Raymond Scott president & CEO	7,613	7,777	21,149	20,467	Seating & electrical systems (e-systems)	5
7	<b>Flex-N-Gate Corp.</b> (217) 278-2600; flex-n-gate.com	1306 E. University Ave. Urbana, IL 61802, USA	Shahid Khan chairman & CEO	6,674	6,041	8,343	7,551	Interior & exterior plastics, metal bumpers & hitches, structural metal assemblies, forward & signal lighting, mechanical	7
8	<b>Panasonic Automotive Systems Co. of America</b> (770) 487-3356; panasonic.com/automotive	776 Hwy. 74 S. Peachtree City, GA 30269, USA	Scott Kirchner president	5,938 f	4,499 fe	17,466 f	14,995 fe	Premium audio systems, navigation systems, compressors, batteries, motors, monitors, sensors; switches & HUDs	13
9	<b>Aisin World Corp. of America</b> (734) 453-5551; aisinworld.com	15300 Centennial Drive Northville, MI 48168, USA	Scott Turpin president	5,845 f	5,651	34,999 f	33,837 f	Body, brake & chassis systems, electronics, drivetrain & engine components	8
10	<b>American Axle &amp; Manufacturing Holdings Inc.</b> (313) 758-2000; aam.com	One Dauch Drive Detroit, MI 48211, USA	David C. Dauch chairman & CEO	5,671	5,013	7,270	6,266	Driveline & drivetrain systems & related components	10
11	<b>Yazaki North America Inc.</b> (734) 983-1000; yazaki-na.com	6801 Haggerty Road Canton, MI 48187, USA	Bo Andersson president & CEO	5,338 fe	4,096 fe	17,500 fe	15,754 fe	Wiring harnesses, connectors, junction boxes, power distribution boxes, instrumentation & high voltage systems	15
12	<b>Adient</b> (734) 254-5000; adient.com	49200 Halyard Drive Plymouth, MI 48170, USA	Doug Del Grosso president & CEO	5,220	5,022	17,400	16,200	Seating & seating systems & components	9
13	<b>Faurecia</b> (248) 724-5100; na.faurecia.com	2800 High Meadow Circle Auburn Hills, MI 48326, USA	Kevin Lammers president	5,167	4,984	20,667	19,170	Faurecia seating & interiors; Faurecia Clarion Electronics & Faurecia clean mobility	12
14	<b>Aptiv</b> (248) 813-2000; aptiv.com	5725 Innovation Drive Troy, MI 48098, USA	David Sherbin senior vp, general counsel, secretary & chief compliance officer, legal	4,890	4,357	12,869	11,776	Electrical & wiring products, body controls, infotainment, safety & autonomous driving technologies	14
15	<b>Tenneco Inc.*</b> (734) 243-8000; tenneco.com	1 International Drive Monroe, MI 48161, USA	Brian Kessler co-CEO	4,700	3,771	10,001	8,023	Emission control systems, manifolds, catalytic converters, diesel aftertreatment systems, catalytic reduction mufflers, shock absorbers, struts, electronic suspension products & systems	17
16	<b>Dana Inc.</b> (419) 887-3000; dana.com	3939 Technology Drive Maumee, OH 43537, USA	James Kamsickas president & CEO	4,072 f	3,677 f	8,143 f	7,209 f	Axles, driveshafts, sealing & thermal management products	19
17	<b>Valeo North America Inc.</b> (248) 619-8300; valeo.com	150 Stephenson Hwy. Troy, MI 48083, USA	Francoise Colpron president	3,937 f	4,066 f	19,683 f	19,360 f	Micro hybrid systems, electrical & electronic systems, thermal systems, transmissions, wiper systems, camera/sensor technology, security systems, interior controls	16
18	<b>Mahle Industries Inc.</b> (248) 305-8200; mahle.com	23030 Mahle Drive Farmington Hills, MI 48335, USA	Markus Kapaun finance executive	3,889 f	3,755 f	14,405 f	14,441 f	Piston systems, cylinders, valvetrains, alternators, air & liquid management systems, vehicle climatization, engine & powertrain cooling, battery cooling, actuators, electric drives & starters	18
19	<b>Sumitomo Electric Wiring Systems Inc</b> (270) 782-7397; sewsus.com	1018 Ashley St. Bowling Green, KY 42103, USA	Hiroshi Kiyokawa president & CEO	3,712 f	3,456 f	15,402 f	15,361 f	Electrical distribution systems, electronics & connection systems	21
20	<b>Thyssenkrupp North America Inc.</b> (312) 525-2800; thyssenkrupp-north-america.com	111 W. Jackson Blvd., Ste. 2400 Chicago, IL 60604, USA	Patrick Bass CEO	3,628 f	3,182 f	14,438 f	12,518 f	Steering, dampers, springs & stabilizers, camshafts, forged machined components, bearings, undercarriage components, axles, forged crankshafts & drivetrain components, high-strength lightweight steels & electrical steel	23
21	<b>BorgWarner Inc.</b> (248) 754-9200; borgwarner.com	3850 Hamlin Road Auburn Hills, MI 48326, USA	Frederic Lissalde president & CEO	3,580 f	3,332 f	10,530	9,800	Turbochargers, electric motors, electronic control units, engine valve-timing, ignition systems, thermal systems, transmission-clutch systems, transmission-control & torque management systems	22
22	<b>BASF Corp.</b> (973) 245-6000; basf.com	100 Park Ave. Florham Park, NJ 07932, USA	Wayne Smith CEO	3,362	2,918	12,931 f	12,157 f	Coatings, catalysts, engineering plastics, polyurethanes, coolants, brake fluids, lubricants, battery materials	25
23	<b>Hyundai Mobis</b> (248) 923-5114; mobis.co.kr	46501 Commerce Center Drive Plymouth, MI 48170, USA	Chung Kook Park CEO	3,121	5,002	25,624	24,984	Automotive electronics, infotainment, ADAS, EV systems, module systems, lighting, airbags & brakes	11
24	<b>Autoliv North America</b> (248) 475-9000; autoliv.com	1320 Pacific Drive Auburn Hills, MI 48326, USA	Dan Garceau president	3,037	3,536	8,678	10,400	Airbags, seat belts, steering wheels & safety electronics	20

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

\*Tenneco acquired Federal-Mogul in Oct. 2018. Sales listed include Federal Mogul's for Oct. - Dec. 2018.

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25	<b>Piston Group</b> (313) 541-8674; pistongroup.com	3000 Town Center #3250 Southfield, MI 48075, USA	Vinnie Johnson founder, chairman & CEO	\$2,844	\$1,665	\$2,844 f	\$1,665 f	Electric batteries, cooling modules, brake corners, grille & shock assemblies, instrument panels, seat trim, sun visors, armrests/bolsters, shades, injection molding & brazed evaporator heater cores	49
26	<b>Yanfeng Automotive Interiors</b> (248) 319-7333; yfai.com	41935 W. 12 Mile Road Novi, MI 48377, USA	Daniel Linder general manager	2,710	2,751	14,506	14,278	Interiors, exteriors, electronics, seating & safety	27
27	<b>Nemak North America</b> (248) 350-3999; nemak.com	Two Towne Square, Ste. 300 Southfield, MI 48076, USA	Luis Pena business unit director, U.S. & Canada	2,631	2,477	4,704 f	4,481	Powertrain, structural & EV components	30
28	<b>Nexteer Automotive</b> (989) 757-5000; nexteer.com	3900 E. Holland Road Saginaw, MI 48601, USA	Michael Richardson president	2,625	2,532	3,912	3,878	Electric power steering, hydraulic power steering, steering columns & halfshafts	28
29	<b>Plastic Omnium Co.</b> (248) 458-0700; plasticomnium.com	2710 Bellingham Road, Ste. 400 Troy, MI 48083, USA	John Dunn president & CEO	2,532	2,495	9,740	9,596	Fascias, front-end modules, rear-end modules, fenders, body panels & fuel systems	29
30	<b>JTEKT Automotive Group Cos.</b> (864) 770-2241; jtekt.co.jp	7 Research Drive Greenville, SC 29607, USA	Koichi Yamanaka president	2,485	2,415 f	13,078	12,709	Bearings, steering systems, driveline systems & machine tools	31
31	<b>Hitachi Automotive Systems Americas Inc.</b> (859) 734-9451; hitachi-automotive.us	955 Warwick Road Harrodsburg, KY 40330, USA	Paul Carroll president & CEO	2,332 fe	2,375 f	8,638 fe	9,030 f	Engine management, electric powertrain & drive control	32
32	<b>GKN Automotive*</b> (248) 296-7000; gkn.com	2200 North Opdyke Road Auburn Hills, MI 48326-2362, USA	Greg MacLean vp, commercial	2,322	3,150	6,450	8,751	Driveline halfshafts, driveshafts, e-drive & awd systems	24
33	<b>Grupo Antolin North America Inc.</b> (248) 373-1749; grupoantolin.com	1700 Atlantic Blvd. Auburn Hills, MI 48326, USA	Goemaere Russ regional manager	2,300	2,165	6,408	6,367	Overhead systems, door modules & panels, window regulators, interior & exterior lighting & cockpits	43
34	<b>Calsonic Kansei North America Inc.</b> (931) 680-6415; calsonic.com	One Calsonic Way Shelbyville, TN 37162, USA	Bharat Vennapusa executive vp & CEO	2,257 f	2,812 f	8,208 f	9,188 f	Climate control, engine cooling & exhaust systems; instrument clusters, console boxes, cockpit modules, instrument panels & front-end modules	26
35	<b>Toyota Gosei North America Corp.</b> (248) 280-2100; toyodagosei.com	1400 Stephenson Hwy. Troy, MI 48083, USA	Yoshiyuki Fujita president	2,231 f	2,177 f	7,642 f	7,281 f	Safety, sealing & interior systems; optoelectronics, exterior trim, rubber/plastic functionals & fuel systems	35
36	<b>Linamar Corp.</b> (519) 836-7550; linamar.com	287 Speedvale Ave. W. Guelph, Ontario, N1H 1C5, Canada	Linda Hasenfratz CEO	2,225	2,146	4,068	3,812	Camshafts, connecting rods, cylinder heads & blocks, balance shafts, fuel rails, transmission gears, differentials, clutch modules, all-wheel-drive systems & e-axes	36
37	<b>Samvardhana Motherson Group</b> (281) 520-3051; motherson.com	Suite # 200, 1018 Preston St. Houston, TX 77002, USA	Vivek Chaand Sehgal chairman	2,177 fe	2,110 fe	11,765 fe	10,550 fe	Rearview mirrors, plastic modules cockpits/IPs, door trims & bumpers, wiring harnesses, plastic parts, rubber components, lighting, air intake manifolds, pedals, shock absorbers, HVAC systems & roof hatches	37
38	<b>Martinrea International Inc.</b> (416) 749-0314; martinrea.com	3210 Langstaff Road Vaughan, Ontario, L4K 5B2, Canada	Pat D'Eramo president & CEO	2,098	2,305	2,724	2,936	Steel & aluminum body, chassis & engine components; fluid handling components & assemblies & modules	33
39	<b>TS Tech Americas Inc.</b> (614) 575-4100; tstna.com	8458 E. Broad St. Reynoldsburg, OH 43068, USA	Minoru Maeda president	2,087 f	2,001 f	4,440 f	4,258 f	Seats & door liners	42
40	<b>Magneti Marelli Holding USA</b> (248) 418-3000; magnetimarelli.com	3900 Automation Ave. Auburn Hills, MI 48326, USA	Gene Spektor country representative	1,984 f	1,597 f	8,702 f	9,234 f	Lighting, powertrain, electronics, suspensions systems, shock absorbers, exhaust systems & plastic parts	51
41	<b>Brose North America Inc.</b> (248) 339-4000; brose.com	3933 Automation Ave. Auburn Hills, MI 48326, USA	Kurt Sauernheimer president	1,982	1,701	7,340	7,089	Mechatronic systems for vehicle doors & seats as well as electric & electronic products for steering, brakes, transmissions & engine cooling	47
42	<b>Bridgewater Interiors</b> (313) 842-3300; bridgewater-interiors.com	4617 W. Fort St. Detroit, MI 48209, USA	Ronald Hall president & CEO	1,969 f	2,010 f	1,969 f	2,010 f	Automotive seating systems	41
43	<b>Schaeffler Group USA Inc.</b> (248) 528-9080; schaeffler.us	1750 E. Big Beaver Road Troy, MI 48083, USA	Marc McGrath president	1,960 e	2,106 e	10,052 e	10,798 e	Anti-friction bearings; engine, chassis & transmission components, wheel & axle bearings, clutch & transmission systems, dampers & e-mobility products	38
44	<b>Cooper-Standard Automotive</b> (248) 596-5900; cooperstandard.com	39550 Orchard Hill Place Drive Novi, MI 48375, USA	Bill Pumphrey president	1,924 f	1,881 f	3,629 f	3,618 f	Systems & components, rubber & plastic sealing, fuel & brake lines, fluid transfer hoses & anti-vibration systems	46
45	<b>Gestamp North America</b> (248) 743-3400; gestamp.com	2701 Troy Center Drive, Ste. 150 Troy, MI 48084, USA	Jon Barronechea director	1,918	1,667	10,096	9,263	Metal components & assemblies, body-in-white, chassis & mechanisms	48

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

\*GKN is now a unit of Melrose Partners. Accounting methods have changed from previous years.

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46	<b>IAC Group</b> (248) 455-7000; iacgroup.com	28333 Telegraph Road Southfield, MI 48034, USA	Robert Steve Miller president & CEO	\$1,855	\$2,156	\$4,122	\$4,400	Cockpits including instrument panels, consoles, doors, headliners & overhead systems	34
47	<b>Arconic Inc.</b> (412) 553-4545; arconic.com	201 Isabella St. Pittsburgh, PA 15212, USA	John Plant chairman & CEO	1,785 e	1,386 e	2,100 e	1,690 e	Aluminum sheet for closure panels, hoods & trunks, bumper systems & crash management systems; extrusions for drive shafts	–
48	<b>North American Lighting</b> (217) 465-6600; nal.com	2277 S. Main St. Paris, IL 61944, USA	Kirk Gadberry president & COO	1,758 f	1,665 f	7,990 f	7,500 f	Exterior lighting	49
49	<b>JATCO USA Inc.</b> (248) 306-9200; jatco.co.jp	38700 Country Club Drive Farmington Hills, MI 48331, USA	Teizo Kuwabara president	1,737 f	1,916 f	6,812 f	6,991 f	Automatic transmissions & continuously variable transmissions	44
50	<b>Toyota Boshoku America Inc.</b> (859) 817-4000; toyota-boshoku.com	1360 Dolwick Drive, Ste. 125 Erlanger, KY 41018, USA	Yoshihiro Ito chairman	1,706 fe	1,909 fe	10,153 fe	13,444 fe	Seats, door trim, carpet, headliners, oil & air filters, door panels, fabrics & substrates	45
51	<b>Novelis Corp.</b> (404) 760-4000; novelis.com	3560 Lenox Road N.E., Ste. 2000 Atlanta, GA 30326, USA	Marco Palmieri senior vp, Novelis Inc., & president, Novelis North America	1,650 fe	1,416 fe	2,947 fe	2,776 fe	Flat-rolled aluminum sheet for vehicle structures, body panels, heat exchangers, heat shields & other automotive applications	53
52	<b>Federal-Mogul*</b> (248) 354-7700; federalmogul.com	27300 W. 11 Mile Road Southfield, MI 48034, USA	Roger Wood & Brian Kessler Co-CEOs	1,628 fe	2,091	3,786	5,650	Emission control systems, manifolds, catalytic converters, diesel aftertreatment systems, catalytic reduction mufflers, shock absorbers, struts, electronic suspension products & systems	40
53	<b>Hyundai Transys Georgia</b> (706) 645-4460; hyundai-transys.com	715 3rd Ave. West Point, GA 31833, USA	Hui-Chul Jang vp	1,591 f	1,410 f	7,574 f	7,834 f	Automatic, manual & dual-clutch transmissions; axles & seating systems –	–
54	<b>Tower Automotive Inc.</b> (248) 675-6000; towerinternational.com	17672 N. Laurel Park Drive, Ste. 400 Livonia, MI 48152, USA	Paer Malmhagen president	1,524 f	1,332 f	1,571 f	1,988 f	Body structures & assemblies, lower vehicle frames & structures, chassis modules & systems & suspension components	55
55	<b>Flex</b> (248) 853-5724; flex.com	27755 Stansbury Blvd., Ste. 300 Farmington Hills, MI 48334, USA	Chris Obey president, automotive	1,500 fe	1,200 fe	3,000 f	2,400 f	Autonomy, connectivity, electrification & smart tech	52
56	<b>Multimatic Inc.</b> (905) 470-9149; multimatic.com	8688 Woodbine Ave. Markham, Ontario, L3R 8B9, Canada	Peter Czapka CEO	1,452 e	1,251 e	1,650 e	1,390 e	Hinge systems, stamped welded assemblies & suspension systems	57
57	<b>Benteler Automotive Corp.</b> (248) 377-9999; benteler.com	2650 N. Opdyke Road, Bldg. B Auburn Hills, MI 48326, USA	Petr Marijczuk executive vp	1,451	1,558	8,060	7,790	Components & modules for chassis, body-in-white & engine & exhaust applications & modular e-mobility system solutions	–
58	<b>NTN Bearing Corporation of America</b> (847) 298-7500; ntnamericas.com	1600 E. Bishop Court, P.O. Box 7604 Mount Prospect, IL 60056, USA	Katsuaki Miyake president	1,332 fe	1,341 fe	4,725 fe	4,860 fe	Automotive constant velocity joints, axle bearings, needle roller bearings, tapered roller bearings & intelligent in-wheel parts for EVs	54
59	<b>Hanon Systems USA</b> (248) 907-8000; hanonsystems.com	39600 Lewis Drive Novi, MI 48377, USA	Jay Son president & CEO	1,295	1,037	5,396	4,939	Thermal & energy management, heating ventilation & air conditioning, powertrain cooling, compressors, fluid transport, thermal & emissions solutions	63
60	<b>Freudenberg North America</b> (734) 354 5505; freudenberg.com	47774 W. Anchor Court Plymouth, MI 48170, USA	Bob Evans president & regional representative	1,276	1,291 e	4,906	4,782	Seals, precision molded components, vibration control, filtration, automotive interior, lubricants & release agents	56
61	<b>Eberspaecher North America Inc.</b> (248) 994-7015; eberspaecher.com	29101 Haggerty Road Novi, MI 48377, USA	Johan Swart president	1,252 f	940 f	5,445 f	4,948 f	Silencers, catalytic converters, particulate filters, manifolds, vehicle heaters, electrical vehicle heaters & electronics	66
62	<b>F &amp; P America Mfg. Inc.</b> (937) 339-0212; fandp.com	2101 Corporate Drive Troy, OH 45373, USA	Makoto Hasegawa president	1,229	1,173 f	2,119 f	2,042 f	Chassis, suspension systems, control arms, pedal assemblies & hydroforming	60
63	<b>HELLA Corporate Center USA Inc.</b> (734) 414-0900; hellausa.com	43811 Plymouth Oaks Blvd. Plymouth, MI 48170, USA	Steve Lietaert president	1,156 fe	1,005 fe	6,801 f	6,280 f	Electronic & lighting components & systems	59
64	<b>Delphi Technologies</b> (248) 813-2000; delphi.com	5725 Delphi Drive Troy, MI 48098, USA	Mary Gustanski chief technology officer	1,147 e	1,093	3,863 e	3,902	Powertrain & aftermarket parts	62
65	<b>TI Fluid Systems</b> (248) 296-8000; tifs.com	2020 Taylor Road Auburn Hills, MI 48326, USA	Bill Kozyra president & CEO	1,115 e	1,195 e	3,983 e	4,193 e	Automotive fluid systems technology	58
66	<b>DAA Draexlmaier Automotive of America</b> (864) 485-1000; draexlmaier.us	1751 E. Main St. Duncan, SC 29334, USA	Josef Mittermeier CEO	1,063 e	927 e	5,060 e	4,633 e	Electrical systems, electrical & electronic components, interiors, system assembly & battery systems	67
67	<b>Kautex Textron North America</b> (248) 616-5100; kautex.com	750 Stephenson Hwy. Troy, MI 48083, USA	Eric Cardinali executive vp	1,005 e	870 e	2,285 e	2,230 e	Fuel tank systems, clear vision systems, selective catalytic reduction systems, camshafts & packaging	69
68	<b>CITIC Dicastal Co.</b> (616) 619-7500; dicastalna.com	1 Dicastal Drive Greenville, MI 48838, USA	Zuo Xu chairman	931 f	763 f	3,580 f	3,052 f	Aluminum alloy wheels & aluminum casting parts	76

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

\*Tenneco acquired Federal-Mogul in Oct. 2018. Sales listed are for Jan. - Sept. 2018.

# Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2018

2018 rank	Company	Address	Top executive	Total North America OEM automotive parts sales (dollars in millions) 2018	Total North America OEM automotive parts sales (dollars in millions) 2017	Total global OEM automotive parts sales (dollars in millions) 2018	Total global OEM automotive parts sales (dollars in millions) 2017	Products	2017 rank
69	<b>Autoneum North America</b> (248) 848-0100; autoneum.com	29293 Haggerty Road Novi, MI 48377, USA	Fausto Bigi head of business group	\$917 f	\$961	\$2,236 f	\$2,183 f	Engine covers, dashes, carpets, floor insulators, floor mats, underbody shields, floor pans, heat shields, wheelhouse liners, dampers, stiffeners & acoustic parts	64
70	<b>CIE Automotive USA Inc.</b> (586) 566-3900; cieautomotive.com	15030 23 Mile Road Shelby Township, MI 48315, USA	Mikel Orbegozo commercial director, America	902	811	3,578	3,256	Engine & powertrain components, chassis & steering components, exterior & interior trim & roof systems components	75
71	<b>American Mitsuba Corp.</b> (989) 773-0377; americanmitsuba.com	2945 Three Leaves Drive Mount Pleasant, MI 48858, USA	Masayoshi Shirato president & CEO	888 fe	807 fe	3,162 fe	3,033 fe	Wiper systems, power window motors, starter motors, fan motors, seat motors, sunroof motors, power slide door assemblies, power tailgate systems & electric power steering motors	72
72	<b>TRAM Inc.</b> (734) 254-8500; tokai-rika.com.jp	47200 Port St. Plymouth, MI 48170, USA	Kazuhiro Ikai president	879 fe	888 f	4,187 f	4,037 fe	Switches, heater control panels, gear shifters, key cylinder & lock sets, seat belts, outer door mirrors & immobilizer systems	65
73	<b>Inteva Products</b> (248) 655-8886; intevaproducts.com	1401 Crooks Road Troy, MI 48084, USA	Lon Offenbacher president & CEO	840 f	750 f	2,800 f	2,500 f	Closure systems, interior systems, roof systems, motors & electronic systems	77
74	<b>Mando America Corp.</b> (248) 668-4300; mando.com	29930 Hudson Drive Novi, MI 48377, USA	DoSoon Park vp	835	828	5,219	5,175	Brakes, steering, suspension, radar, camera, ultrasonic, chargers & components & advanced highly automated driving chassis systems	71
75	<b>Sumitomo Riko America</b> (248) 946-4915	41441 11 Mile Road Novi, MI 48375, USA	N.A.	800 fe	818 fe	2,566 fe	3,750 fe	Anti-vibration molded rubber & fuel delivery systems	73
76	<b>DuPont Transportation and Industry</b> (302) 114-1000; dupont.com	974 Centre Road Wilmington, DE 19805, USA	Randy Stone business president	768 e	681 f	3,200 e	1,839 f	engineered polymers, glass bonding adhesives, structural adhesives, lubricants, fluids & silicones	81
77	<b>Johnson Electric North America</b> (734) 392-5302; johnsonelectric.com	47660 Halyard Drive Plymouth, MI 48170, USA	Douglas Eberle vp, sales	757 f	771 fe	2,541 f	2,494 f	Cooling fan modules, engine & transmission oil pumps, engine actuators & valves, power steering motors, HVAC & lighting actuators, electric motors, switches, solenoids & flexible PCBs	78
78	<b>NSK Americas Inc.</b> (734) 913-7500; nskamericas.com	4200 Goss Road, P.O. Box 134007 Ann Arbor, MI 48105, USA	Colan Rogers president & general manager	756 fe	813 fe	5,010 fe	5,610 fe	Bearings, hub bearings, steering columns, electric power steering & automatic transmissions products	74
79	<b>Henniges Automotive</b> (248) 340-4100; hennigesautomotive.com	2750 High Meadow Circle Auburn Hills, MI 48326, USA	Larry Williams president & CEO	731	626	1,076	994	Weather seals & anti-vibration products	85
80	<b>Visteon Corp.</b> (800) 847-8366; visteon.com	One Village Center Drive Van Buren Township, MI 48111, USA	Sachin Lawande president & CEO	716	849	2,984	3,146	Cockpit electronics: instrument clusters, head-up & information displays, infotainment, connected audio & connectivity & telematics	70
81	<b>Garrett Motion</b> (734) 392-5500; garrettmotion.com	47548 Halyard Drive Plymouth, MI 48170, USA	Anthony Lodato vp & general manager	709 e	619 e	3,375	3,096	Turbochargers, e-compressors, e-turbos & fuel cell compressors; software solutions covering controls & prognostic integrated vehicle health mgmt.	-
82	<b>Webasto Roof Systems Inc.</b> (248) 997-5100; webasto-group.com	1757 Northfield Drive Rochester Hills, MI 48309, USA	Andre Schoenekaes president & CEO	688 fe	657 fe	4,049 fe	3,865 fe	Sunroofs, panorama roof systems, convertible roof systems & parking heaters	83
83	<b>Infineon Technologies North America Corp.</b> (866) 951-9519; infineon.com	640 N. McCarthy Blvd. Milpitas, CA 95035, USA	Robert LeFort president	674	634	4,210	3,727	Microcontrollers, intelligent sensors; power semiconductors & power modules for powertrain (combustion, hybrid, electric); safety; security & body & convenience applications	84
84	<b>Dura Automotive Systems</b> (248) 299-7500; duraauto.com	1780 Pond Run Auburn Hills, MI 48326, USA	Lynn Tilton CEO	588 fe	572 f	1,400 fe	1,430 f	Mechatronic controls, shift-by-wire systems; electronics, actuators & advanced driver assist systems; lightweight structural body systems & exterior trim	87
85	<b>Inalfa Roof Systems USA</b> (248) 371-3060; inalfarooftsystems.com	1370 Pacific Drive Auburn Hills, MI 48326, USA	Angel Legarda CEO	583 f	468 f	3,869 f	3,700 f	Body systems, interior systems, exterior chassis systems, electronic parts systems & seat systems	90
86	<b>Auria</b> (248) 728-8000; auriasolutions.com	26999 Central Park Blvd., Ste 300 Southfield, MI 48076, USA	Brian Pour president & CEO	572	616	1,100	1,100	Flooring, acoustical, thermal products & fiber-based components	86
87	<b>Gentex Corp.</b> (616) 772-1800; gentex.com	600 N. Centennial St. Zeeland, MI 49464, USA	Steve Downing president & CEO	555 f	545 f	1,791 f	1,758 f	Interior & exterior auto-dimming rearview mirrors, SmartBeam advanced lighting-assist, rear camera displays, compasses, LED turn signals, side blind-zone indicators & driver assist features	88
88	<b>Continental Structural Plastics</b> (248) 237-7800; cspplastics.com	255 Rex Blvd. Auburn Hills, MI 48326, USA	Steve Rooney CEO	517 f	448 fe	518 f	449 fe	Lightweight composite Class A body panels, battery carriers, pickup boxes & underbody/under hood components	92
89	<b>Gentherm Inc.</b> (248) 504-0500; gentherm.com	21680 Haggerty Road, Ste. 101 Northville, MI 48167, USA	Phil Eyler president & CEO	484	449	949	880	Climate control seats, seat heaters, steering wheel heaters, automotive cables & battery thermal management	-
90	<b>Shiloh Industries Inc.</b> (330) 558-2600; shiloh.com	880 Steel Drive Valley City, OH 44280, USA	Ramzi Hermiz president & CEO	483 f	531 f	645 f	656 f	Lightweight, noise, vibration & harshness solutions, for body & interiors, chassis & propulsion systems	82

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

N.A. = Not available

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# Top 100 suppliers – The largest suppliers to North America, ranked by sales of original equipment parts in 2018

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91	<b>AGC Automotive Americas</b> (248) 522-9300; agc-automotive.com	34505 W. Twelve Mile Road, Ste. 300 Farmington Hills, MI 48331, USA	Tatsuo Sugiyama regional president	\$473 fe	\$477 fe	\$2,883 fe	\$2,775 fe	Glazing systems	89
92	<b>MacLean-Fogg Component Solutions</b> (847) 566-0010; macleanfoggcs.com	1000 Allanson Road Mundelein, IL 60060, USA	Duncan MacLean president & CEO	453	430	453	430	Fastener components, engineered components & engineered plastics	93
93	<b>Ryobi Die Casting USA</b> (317) 398-3398; ryobidiecasting.com	800 W. Mausoleum Road Shelbyville, IN 46176, USA	Ryan Willhelm president & COO	444 fe	415 fe	1,848 f	1,805 fe	Aluminum high pressure die castings, powertrain & structural components	96
94	<b>Kostal of America Inc.</b> (248) 284-6500; kostal-automobil-elektrik.com	350 Stephenson Hwy. Troy, MI 48083, USA	Wolff Carsten president & CEO	433	424 fe	2,884	2,828	Steering column & center console modules, driver assistance, body network controls, interior controls, power application control units, roof modules & switch panels	94
95	<b>NHK International Corp.</b> (248) 926-0111; nhkspg.co.jp	46855 Magellan Drive Novi, MI 48377, USA	Hideto Enomoto president	377 fe	383 fe	3,431 fe	3,479 fe	Stabilizer bars, coil springs & seats & valve springs	99
96	<b>Omron Automotive Electronics Inc.</b> (248) 893-0200; omronauto.com	29185 Cabot Drive Novi, MI 48377, USA	Randy Wara president	375 f	414 f	1,359 f	1,388 f	Electronic control units, keyless entry, switches, closure controls, relays & electronic power steering	97
97	<b>Minth North America Inc.</b> (248) 848-3580; minthgroup.com	51331 Pontiac Trail Wixom, MI 48393, USA	Natalie Chin president	359	343	1,902	1,750	Trims, body structural parts, decorative parts, roof racks, seating systems & battery housings	-
98	<b>Stoneridge Inc.</b> (248) 489-9300; stoneridge.com	39675 MacKenzie Drive, Ste 400 Novi, MI 48377, USA	Jonathan DeGaynor president & CEO	344 e	371 e	615 e	619 e	Electronic component systems & modules; switches, sensors & power actuators	100
99	<b>Varroc Lighting Systems</b> (734) 446-4400; varrocgroupp.com	47828 Halyard Drive Plymouth, MI 48170, USA	Stephane Vedie president & CEO	327 f	379 f	937 f	936 f	headlamps, signal lamps, auxiliary lamps, projector systems & electronic control modules	-
100	<b>Constellium</b> (443) 420-7881; constellium.com	300 East Lombard St. Baltimore, MD 21202, USA	Jean-Marc Germain CEO	319	210	1,595	1,237	Aluminum crash management systems; body structure components & battery enclosures; aluminum flat rolled coils & sheets for body panels; heat exchangers & decorative solutions; Aluminum profiles for ABS	-

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

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