



European Automotive Supplier Report

The **European Automotive Supplier Report** looks at the macroeconomic environment including vehicle sales, production, imports and exports. The report also provides analysis of the OEM's, the European Supply Industry and looks at both Eastern and Western Europe.

Suppliers' major investments in Europe are detailed along with a who supplies whom section for the major OEM's. Also included are over 200 in-depth supplier profiles.

Background to this Research

After two challenging years for the European and global auto industry as a whole, the European automotive supply industry, which plays a fundamental role in the value chain of the regional car manufacturing industry and in the economies of both mature Western European countries and the emerging Central and Eastern Europe region, is slowly emerging from one of the most severe crises its has ever faced with over 150 insolvencies, significant job cuts and the freezing of investments.

However the crisis in Europe did not have the same impact that it had on the supply base to North America and did not result in draconian restructurings in the bankruptcy courts. Mortality rates for European suppliers between 2008 and 2010 did not match various Cassandra-style expectations forecasting them to be ten-fold higher than in normal times, with 500 companies going bankrupt and six digit job losses. Government intervention in the form of the almost region wide scrapping schemes and temporary lay-off schemes had clearly an important role in avoiding further disruption to the already faltering financial state of suppliers.

Executive Summary

Chapter 1 – Macroeconomic environment

- Vehicle Sales
- Production
- Imports
- Exports

Chapter 2 – The OEMs

- OEMs' management of the supply base
- OEM new activity
- Production and Sourcing Strategy

Chapter 3 – European Supply Industry

Chapter 4 – Western Europe

Germany
France
Italy
Spain
United Kingdom

Chapter 5 – Emerging Markets: Eastern Europe

Czech Republic
Hungary
Poland
Romania
Russia
Serbia
Slovakia
Turkey
Ukraine

Annex

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Who Supplies Whom – Major European OEMs

EXTERIOR
CHASSIS / UNDERBODY
POWERTRAIN
INTERIOR
ELECTRICAL / ELECTRONIC

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