



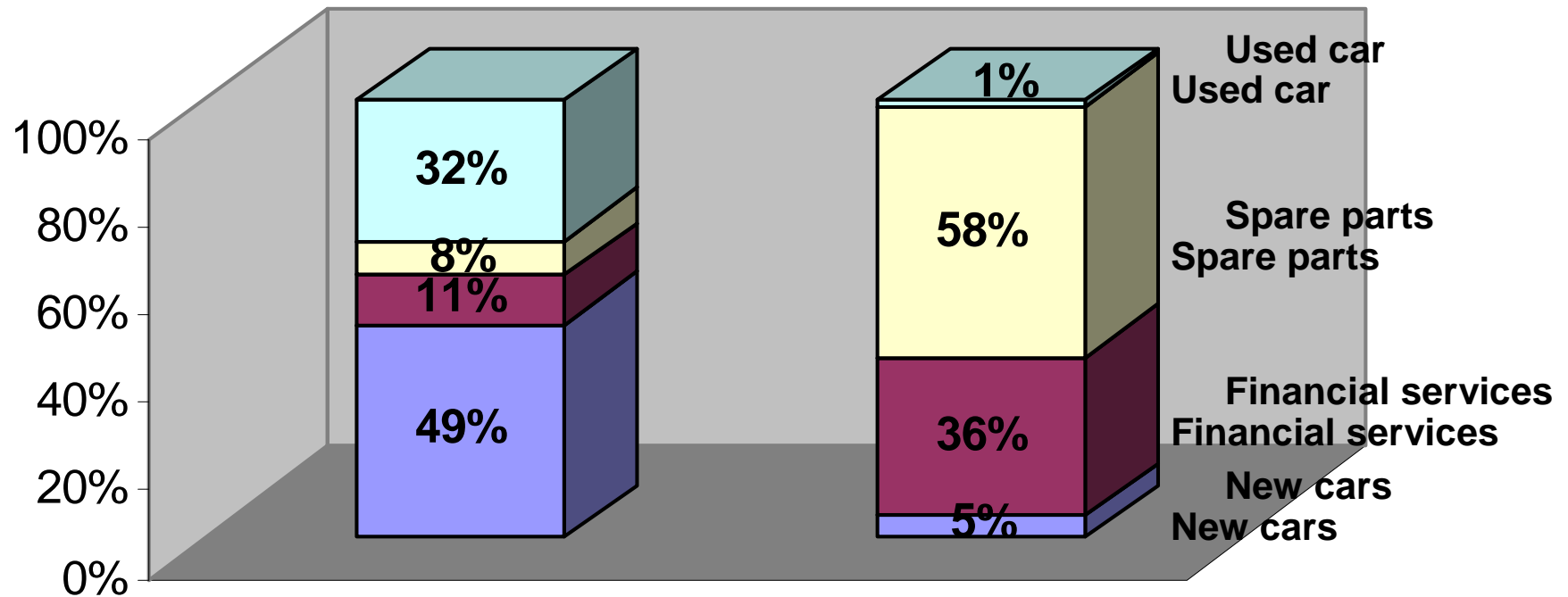
INDUSTRIE LUXEMBOURGEOISE DES EQUIPEMENTIERS DE L'AUTOMOBILE

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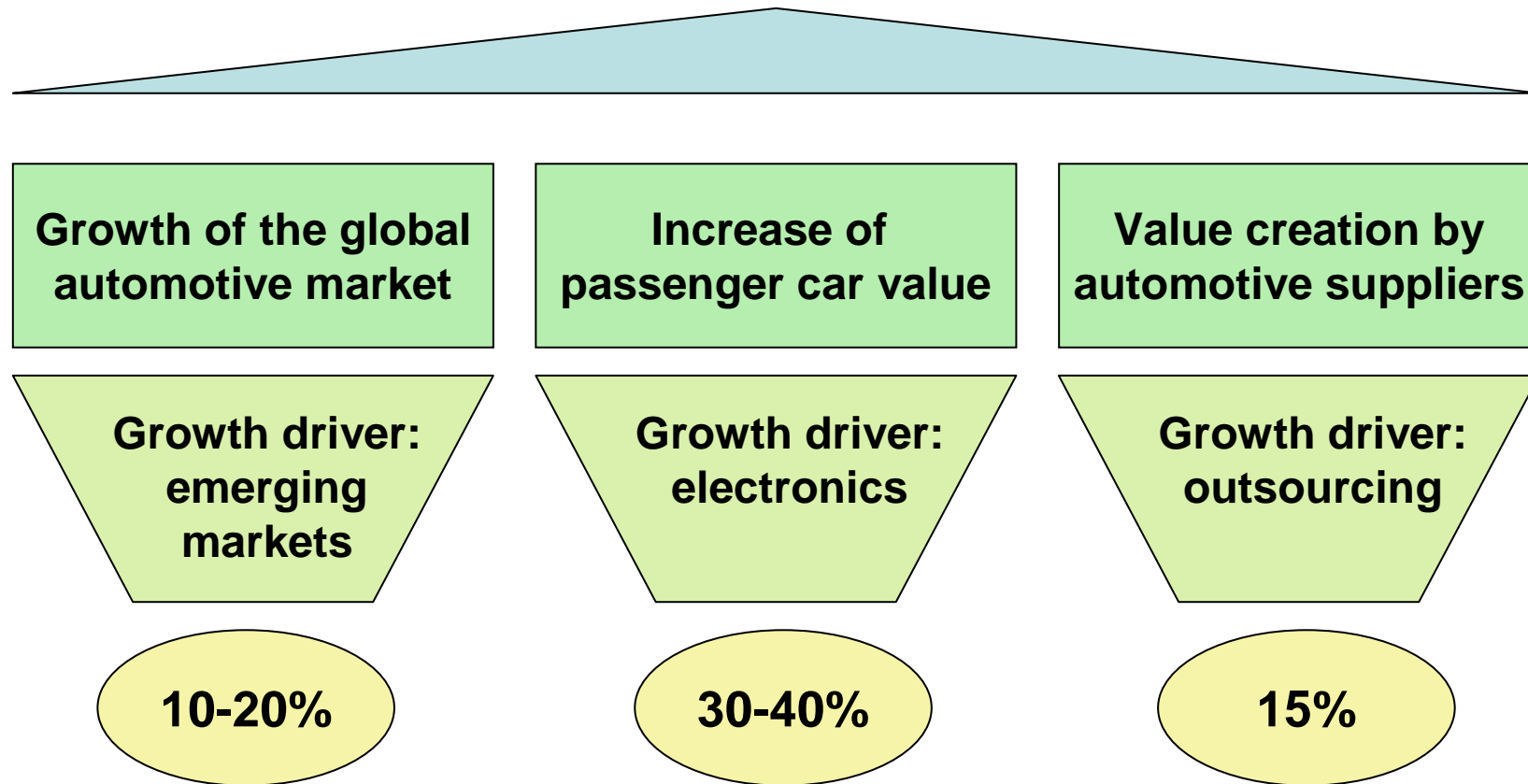
# The automotive components industry



## Automotive sales turnover and earnings

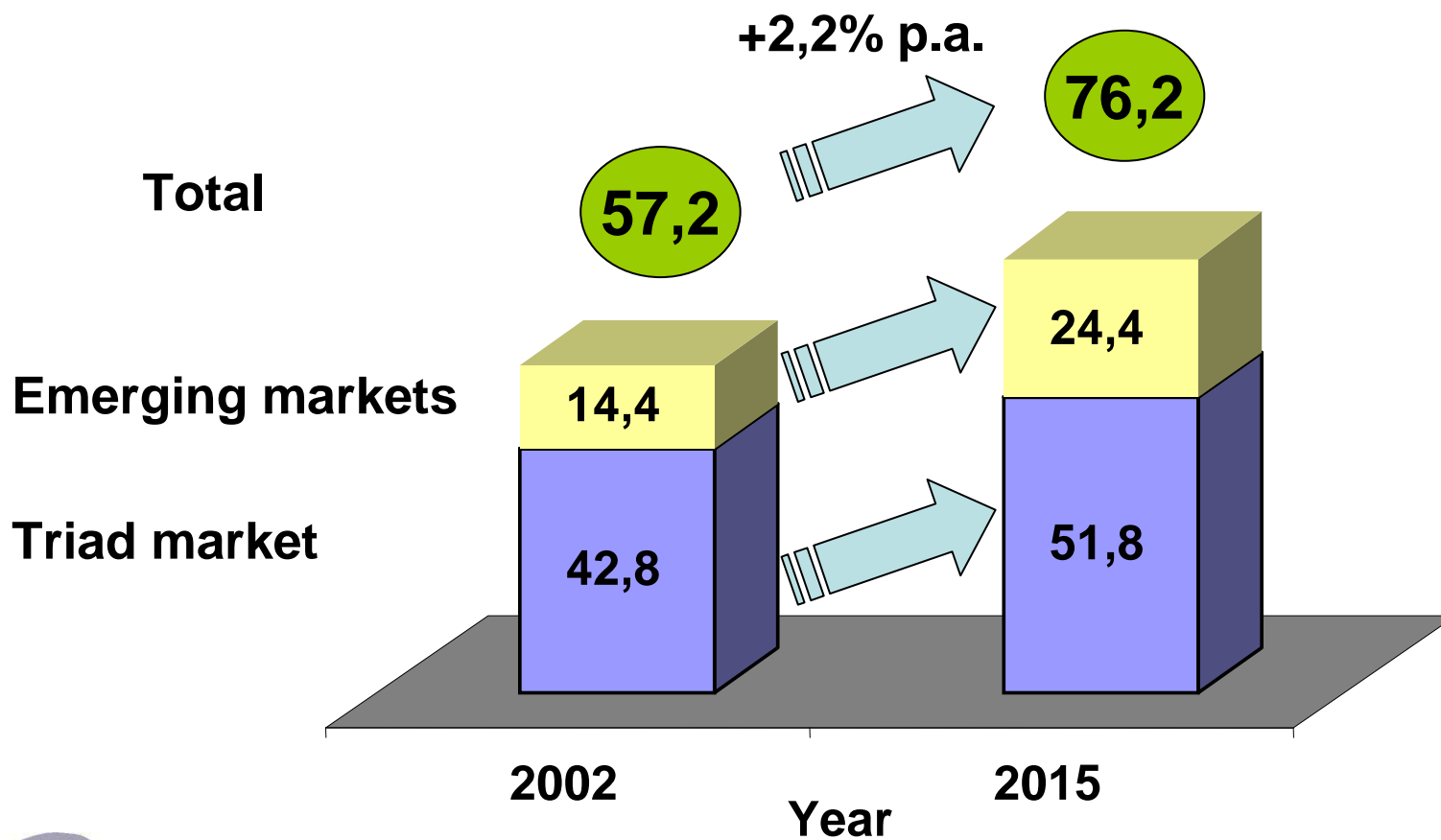


## Growth of automotive supply industry 2015 scenario



Source: Mercer Management Consultant

## Global motor vehicle market

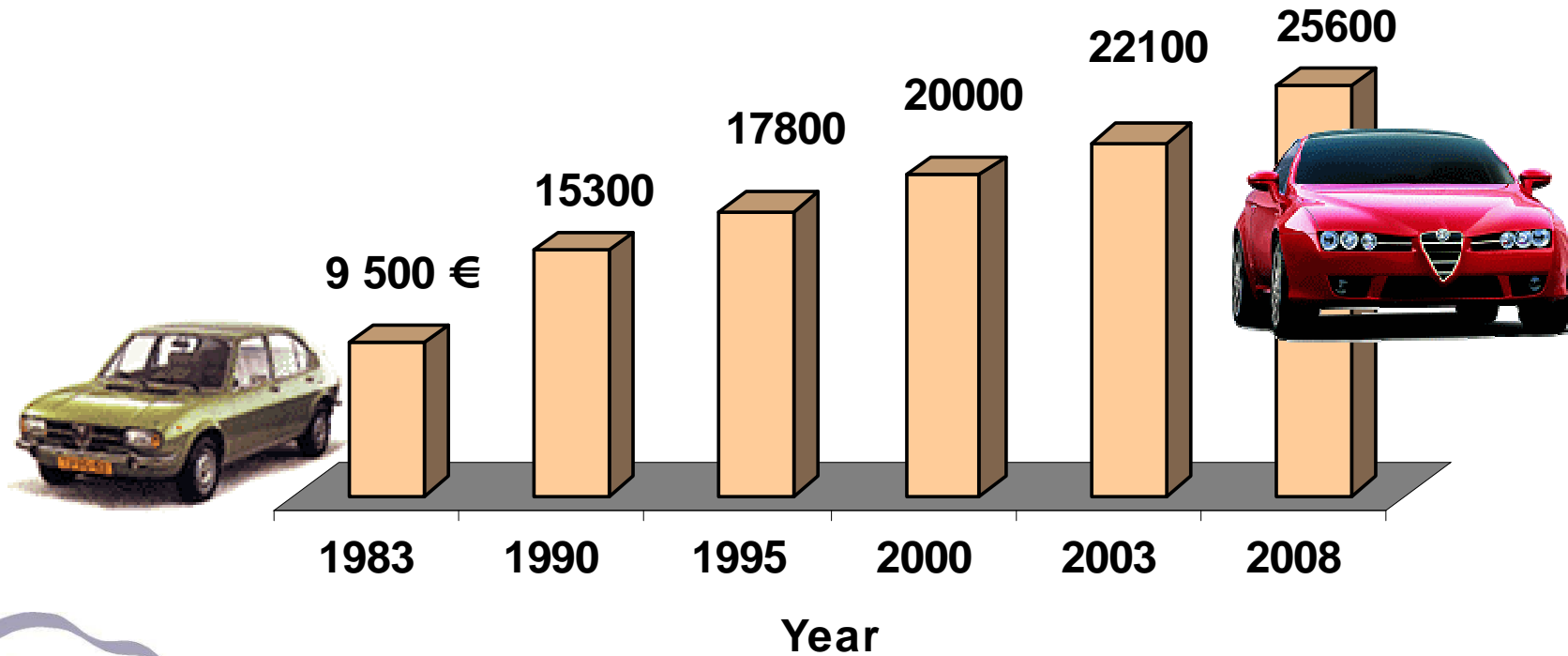


Source: Mercer Management Consultant

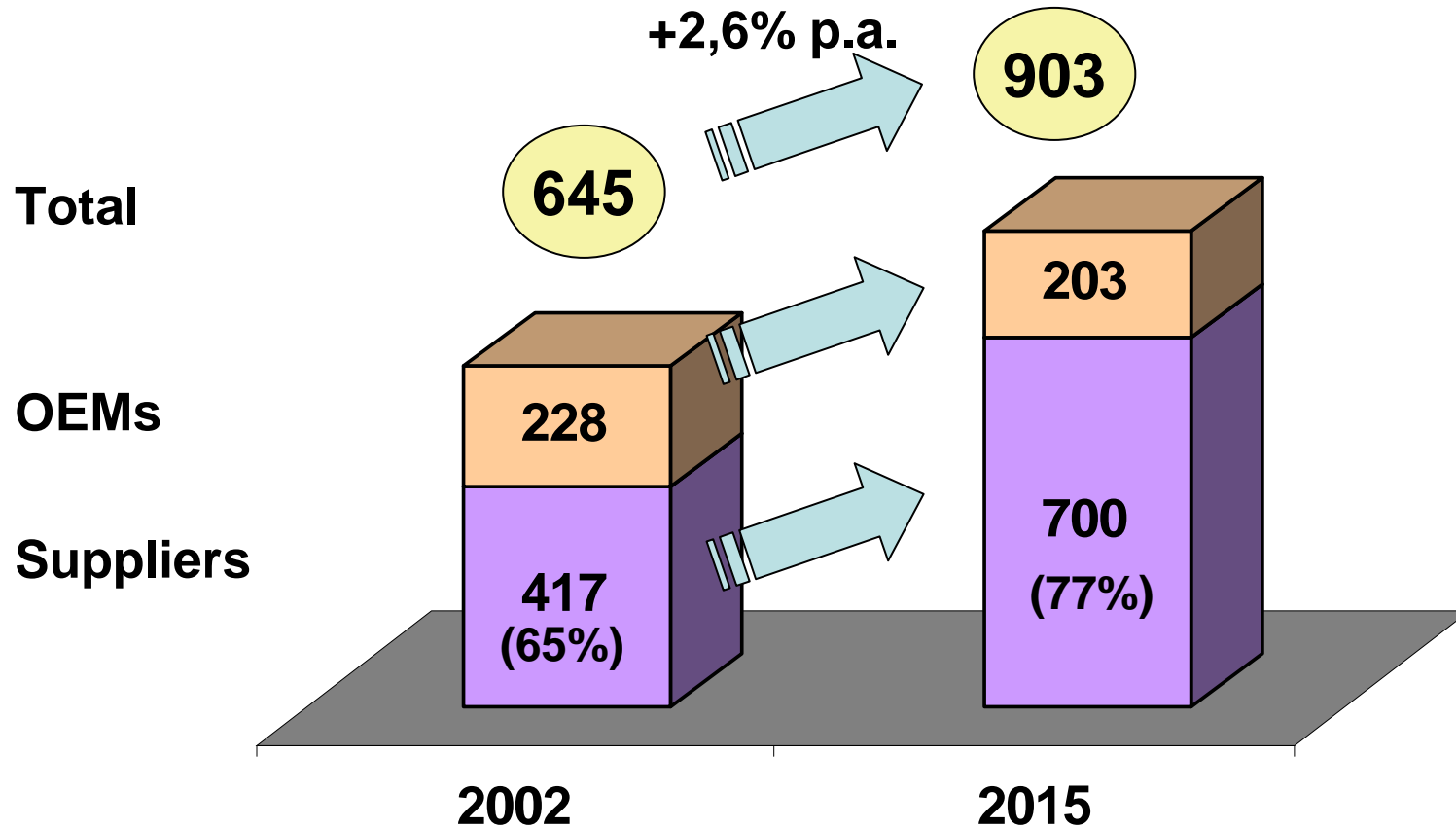


## Increase of car value

### Average passenger car price (Euro)



## Value creation by automotive suppliers (R&D and production)



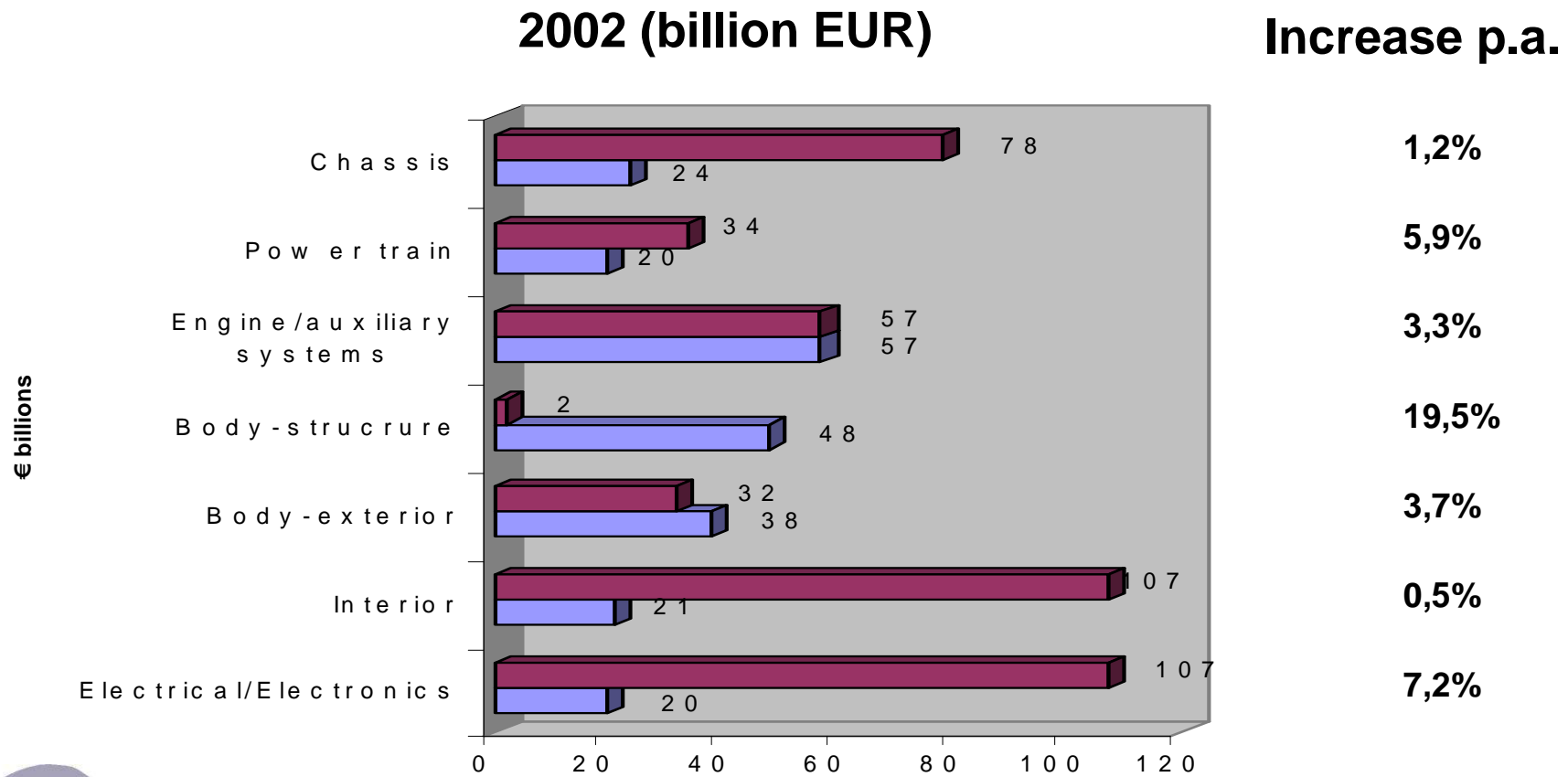
in billion €

Source: Mercer Management Consultant

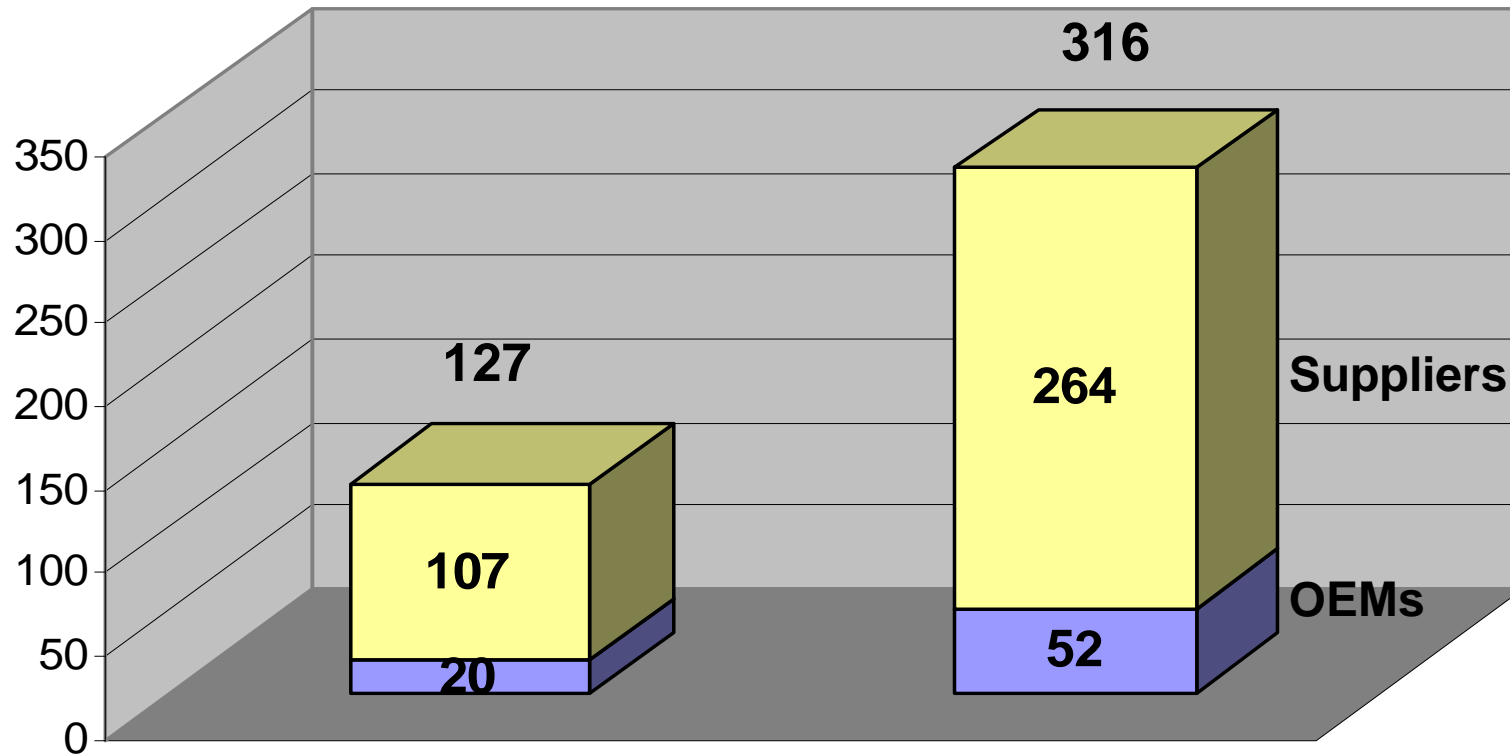


## Main modules: share of OEM / supplier

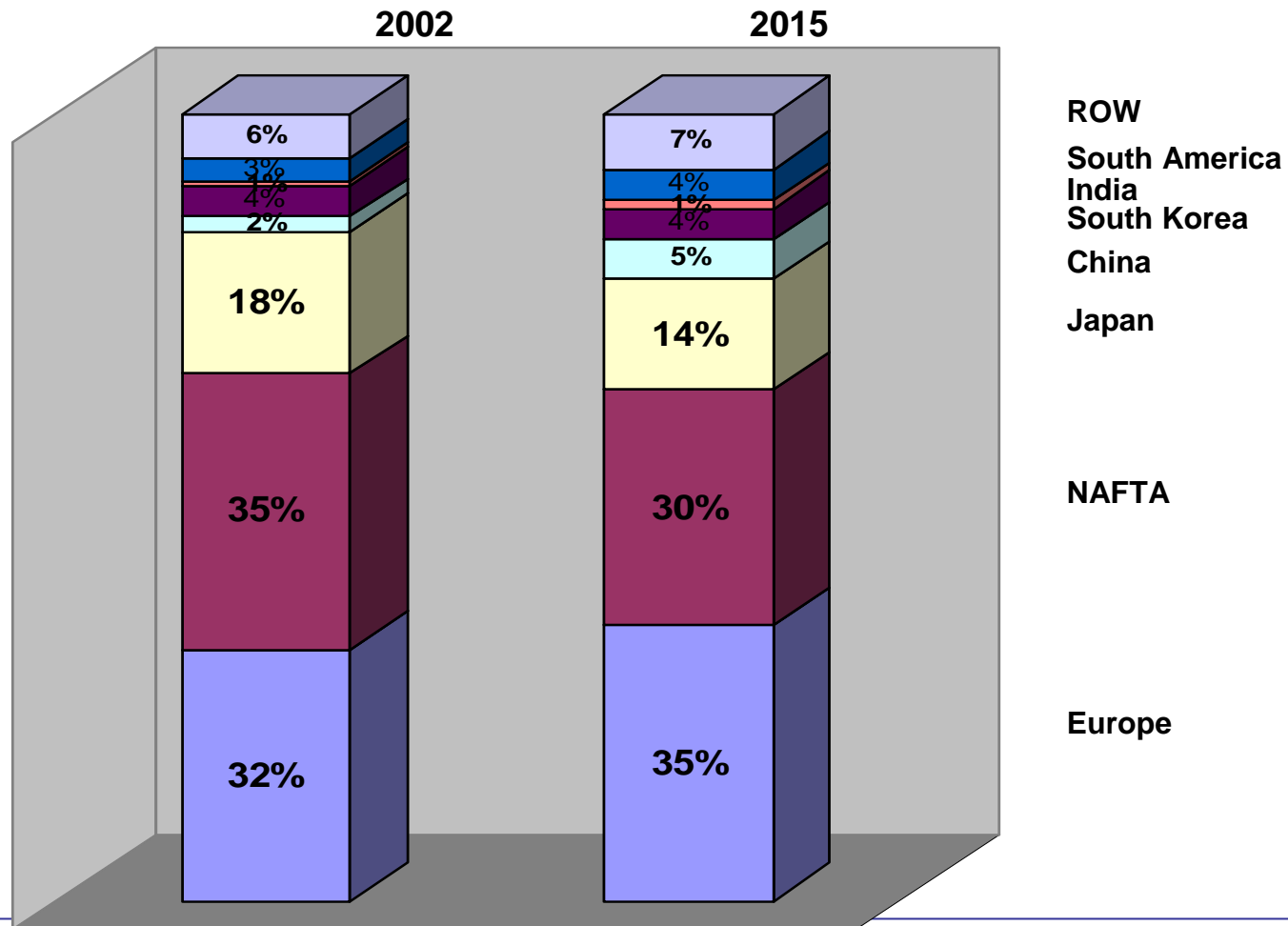
Value creation shift from OEMs to suppliers



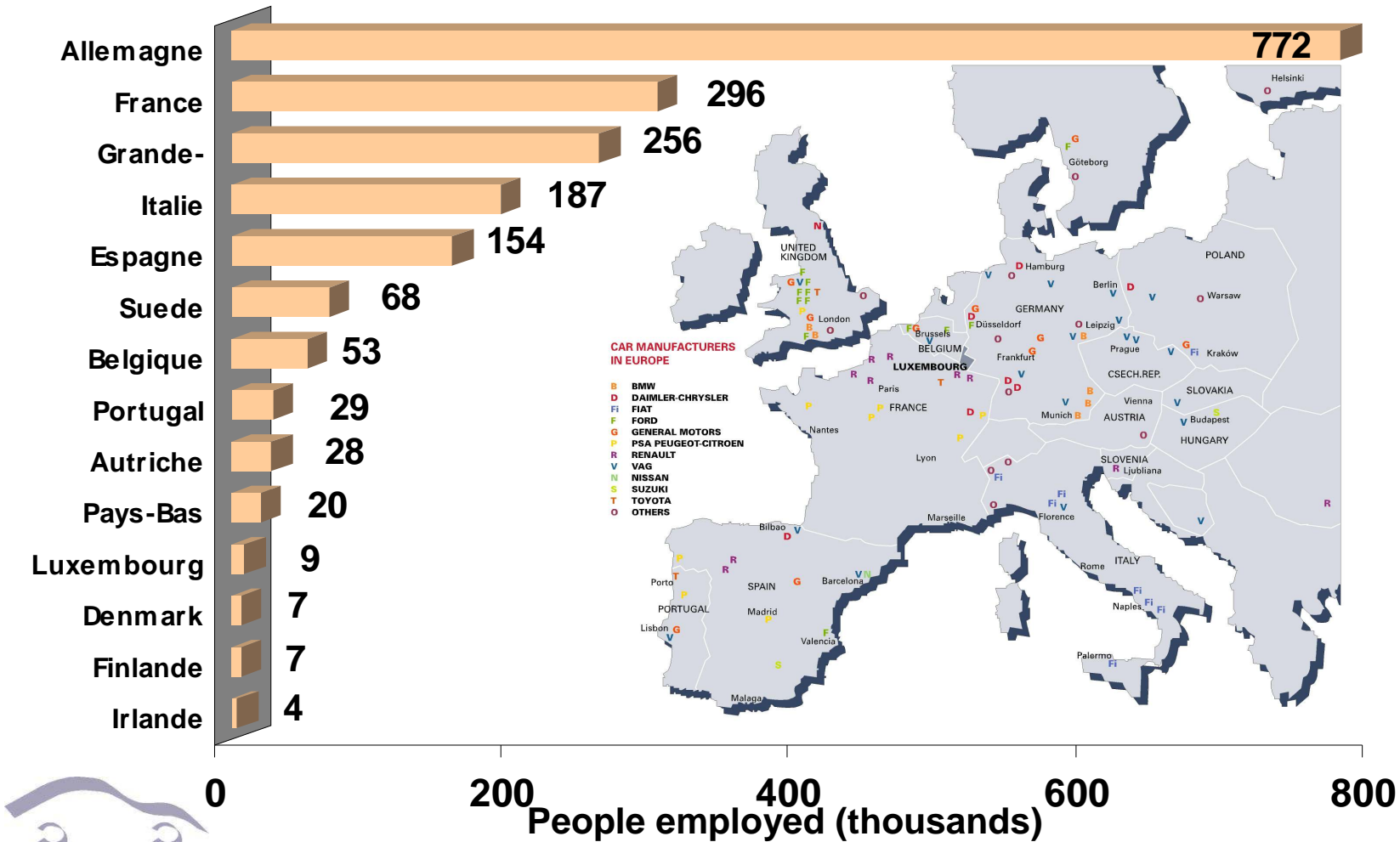
## Value added Electric / Electronics (billion €, worldwide)



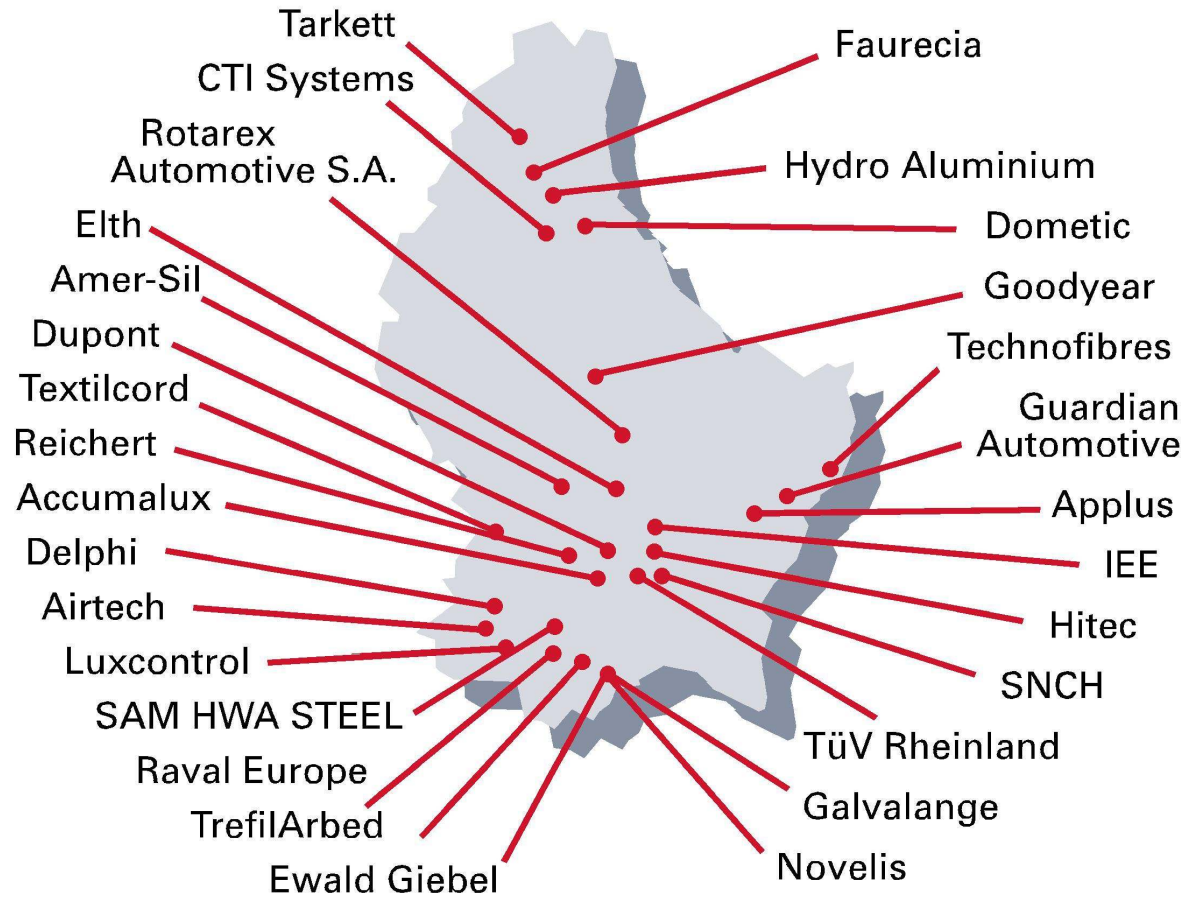
## Value creation (R&D and production)



# Automotive sector in Europe



## Automotive sector in Luxembourg



## **Automotive R&D in Europe**

**Global R&D expenses:**

**OEMs: 54 billion Euros in 2000**

**Suppliers: 63,8 billion Euros in 2000**

**38% of total automotive R&D expenses operated in Europe**

**Automotive R&D expenditures account for 19% of total European manufacturing R&D costs**

**90% of innovations in electronics and software**



## Luxembourg in the middle of the vehicle manufacturer community

- 22 light vehicle production plants within a 300 km radius
- 51 light vehicle production plants within a 600 km radius





INDUSTRIE LUXEMBOURGEOISE DES EQUIPEMENTIERS DE L'AUTOMOBILE

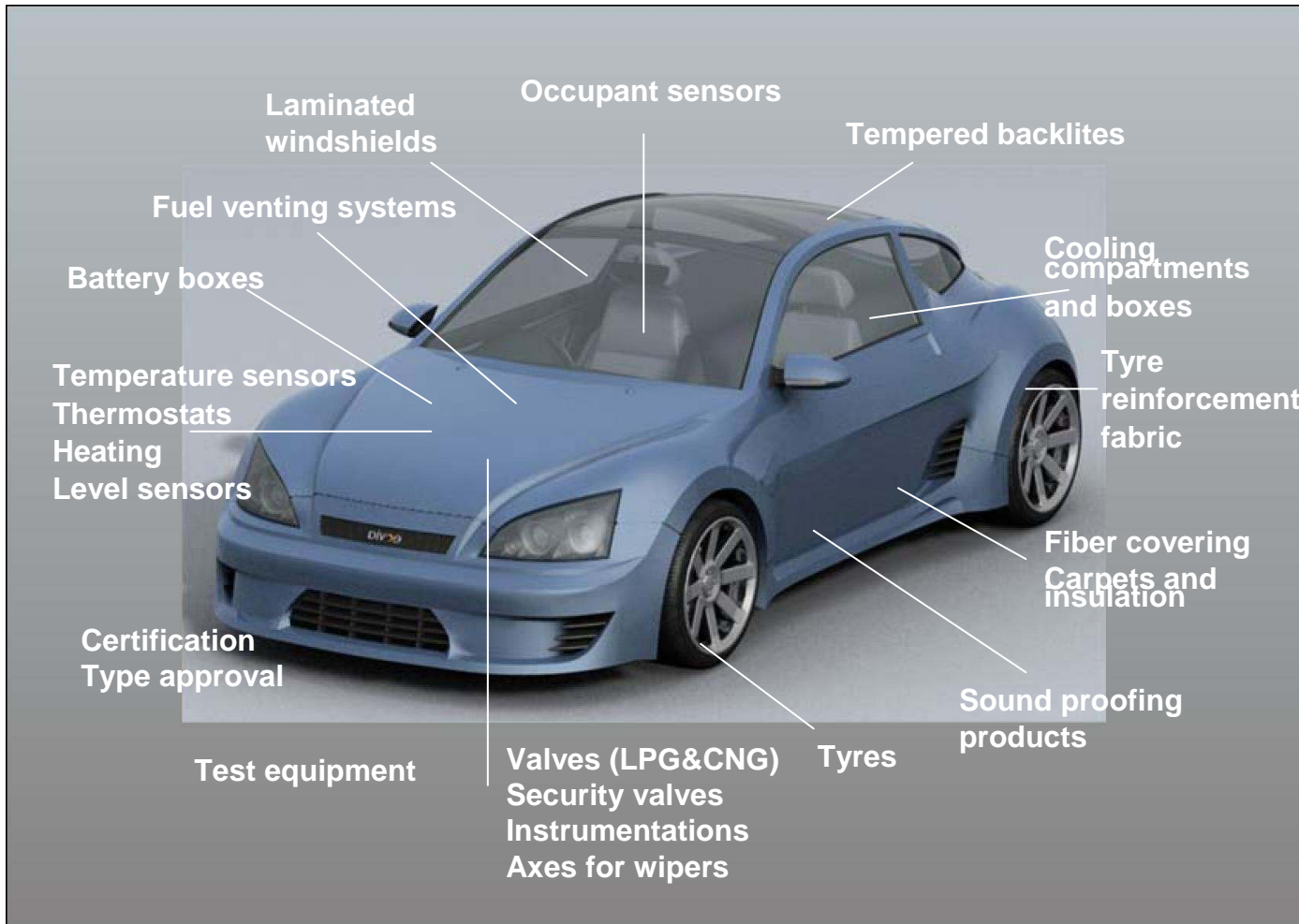
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## **Component industry in Luxembourg**

- **More than 1,5 billion € sales turnover in 2002**
- **Equal to 0,4 % of EU sales turnover in the automotive components industry**
- **Highest per capita automotive components turnover in EU**
- **Approx. 10.000 employees**
- **Exporting to 5 continents**
- **Major export countries are:**
  - Germany, France, Italy, UK, Japan, Spain, USA**
- **Major Japanese customers:**



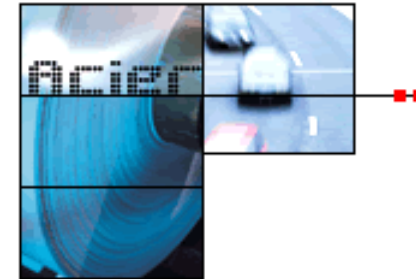
# Automotive components made in Luxembourg



## Automotive product areas

### Metal industry

- Arcelor S.A.
- Ewald Giebel Luxembourg S.à r.l.
- Galvalange S.à r.l.
- Hydro Aluminium Clervaux S.A.
- Pechiney Eurofoil Luxembourg S.A.



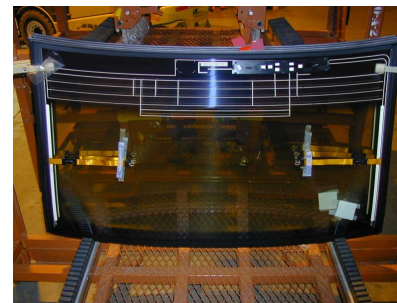
### Tyre Industry

- Goodyear S.A.
- Trefilarbed Bettembourg S.A.
- Textilcord Steinfort S.A.



### Glass

- Guardian S.A



## Automotive product areas

### Fuel supply and exhaust components

- Cerametal S. à r.l.
- Delphi S.A.
- Raval Europe S.A.
- Rotarex S.A



### Starting and ignition

- Accumalux S.A.
- Amer-Sil S.A.
- Delphi S.A.



## Automotive product areas

### Interior and exterior trim components

- Airtech Europe S.A.
- Eurocomposites
- Faurecia – SIA  
Automotive Silux S.A.
- Tarkett Sommer  
Luxembourg S.A.
- Technofibres S.A.



### Thermal components

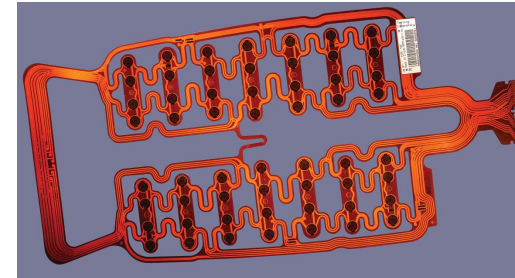
- Elth S.A.
- Delphi S.A.
- Dometic S.à r.l.



## Automotive product areas

### Sensors

- Delphi S.A.
- Elth S.A.
- IEE S.A.



### Equipment

- GE Fanuc S.A.
- Hitec S.A.
- Husky
- CTI



### Type approval and certification

- Luxcontrol S.A.
- SNCH S.à r.l.
- TÜV Rheinland S.A.



## Automotive R&D in Luxembourg

- Two public technical research centres
- Public University in foundation phase
- 2.200 employees in R&D
- Most important automotive R&D companies are:
  - Goodyear
  - Delphi
  - IEE
  - ELTH
  - Guardian Automotive

