

Automotive Textiles

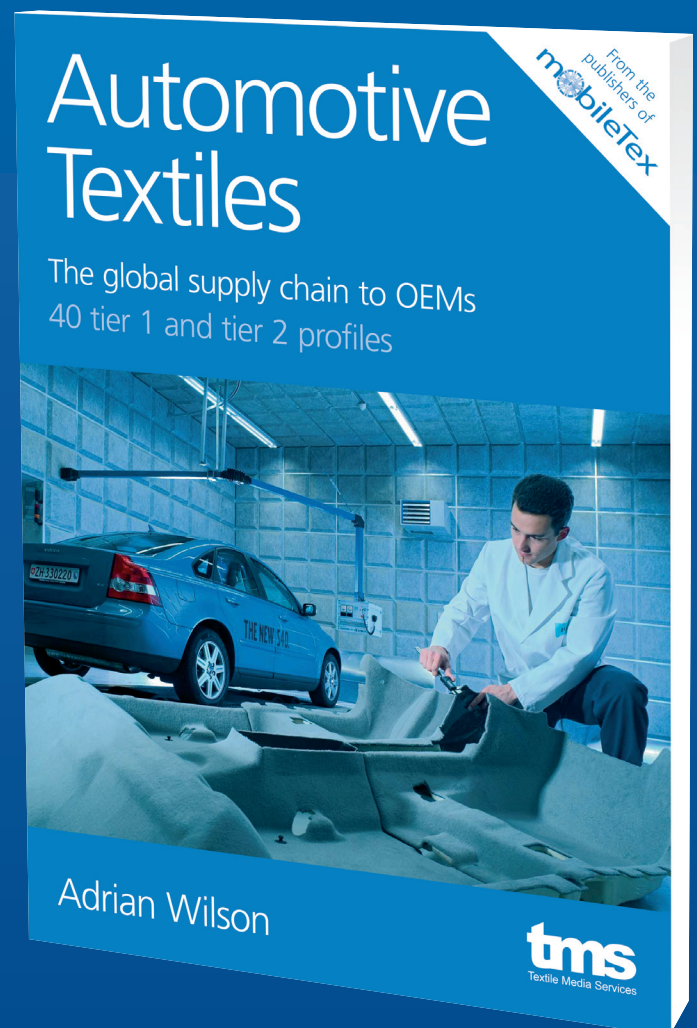
The global supply chain to OEMs
40 tier 1 and tier 2 profiles

Automotive Textiles: The Global Supply Chain to OEMs 40 Tier 1 and Tier 2 Profiles provides a review and analysis of the global automotive textiles industry and builds on the expertise of MobileTex, the monthly newsletter covering the transport textiles sector.

In addition to providing an overview of the global automotive industry and the wide-ranging use of textile materials in vehicles, this new report covers the latest developments with regard to product areas and leading players, bringing together the key themes that are forecast to play a prominent role in future generations of automotive textiles.

Written by Adrian Wilson, this in-depth report, with more than 200 pages and over 80 tables:

- examines the global automotive industry
- defines automotive fabrics and textiles
- identifies key areas of application
- contains profiles of 40 key users and producers of automotive textiles.




Automotive Textiles: The global supply chain to OEMs

from the publisher of **mobiletext**

Automotive Textiles

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Adrian Wilson

tms
Textile Media Services

Automotive Textiles: The global supply chain to OEMs

Gamma had discontinued its Car Fabrics business operation at the beginning of 2006. In the automotive upholstery and industrial knitted fabrics market there is an increasing need for globalisation, forward integration and expansion of product range. Gamma had said at the time, adding that it did not wish to play a role in such developments was, therefore, looking for a strategic partner better able to help its Car Fabrics business realise further growth.

Gamma had been the third biggest supplier of automotive fabrics in Europe until 2002-03. Gamma's profitability came under considerable pressure, despite comparatively even turnover. Customers in 2002-03 were listed as Ford/Mazda, Opel, PSA Peugeot Citroën, Renault/Nissan, Toyota and Mitsubishi.

Gamma had two specialised locations were set up for the production of car upholstery at De Lier in Wervik, Belgium, for woven fabrics and Delcar in Saint Quentin, France, for knitted fabrics. A new weaving plant at the Wervik site was completed in 2003.

Gamma Car Fabrics business also included production units in South America and Portugal, a strategic alliance in Japan with Seiren and a joint venture — Bhilwara — in India. The total number of employees was 738 in 2004 and 646 in 2005.

Witte Lister is supported by an extensive global network of companies with which it works together on assignments. It co-operates with a growing number of partners — in various phases and sometimes for years at a time — on car upholstery fabric programmes. During this process, designs are continually perfected and refined, before the client makes final selection.

Gamma Car Fabrics activities in the field of household linen were separated from car upholstery activities in 2005 and sold as a separate entity to French company HDML in February 2006.

Gamma Europe specialises in knitting and finishing techniques, and is a supplier of upholstery fabrics for imitation leather used by many European automotive manufacturers. It has recently developed knitted spacer materials as replacements for foam for car seats that have a number of advantages, including their recyclability, the elimination of electrostatic charging and increased seating comfort. It has also started offering the use of knitted spacer fabrics for ventilation and filter systems.

Gamma Europe sales within the Gamma group were reported as €1.5m in 2005, down from €1.8m in 2004. It has production facilities in Enschede, the Netherlands, Reims, France, and Wigan, UK.

Gamma Arnes in the Netherlands opened a fully renovated dyeing department with a water recovery system which meets the standards of the Dutch Ministry of Environment (VROM). Dyeing capacity was expanded by the installation of a new Thies HT dyeing line.

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ArvinMeritor LVS

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ArvinMeritor, formed in 2000 through the merger of Meritor Automotive and Arvin Industries, has an annual turnover of US\$3.9bn with some 31,000 employees in 25 countries, and 24 further joint ventures in 12 of them. Headquartered in Troy, Michigan, USA, it comprises two business units, LVS (Light Vehicle Systems) and CVS (Commercial Vehicle Systems).

The Aperture Systems division of the LVS business unit manufactures door and roof systems, and within the context of this report is noteworthy for its introduction of a number of innovative fibre and fabric technologies in its roofing products.

Pandrol North America — the leading supplier of filtration products including air, oil and fuel filters — was part of the now discontinued ArvinMeritor LVA (Light Vehicle After-sales) business, until its sale to Bosch in February 2006.

ArvinMeritor LVS, sales by product (%)

| | 2004 | 2005 | 2006 |
|------------------------|-----------|-----------|-----------|
| Emissions Technologies | 33 | 29 | 31 |
| Aperture Systems | 18 | 15 | 13 |
| Undercarriage Systems | 9 | 10 | 9 |
| Total LVS | 61 | 54 | 53 |

Source: ArvinMeritor

ArvinMeritor CVS, sales by product (%)

| | 2004 | 2005 | 2006 |
|--------------------------------------|-----------|-----------|-----------|
| Undercarriage and Drivetrain Systems | 35 | 40 | 43 |
| Specialty Systems | 6 | 6 | 6 |
| Total CVS | 41 | 46 | 47 |

Source: ArvinMeritor

Aperture Systems amounts for between 18-20% of the annual sales of LVS, which in 2006 were US\$4.9bn, compared with the US\$4.2bn made by CVS in that year.

Its complete roof modules comprise a headliner bound to an outer shell using a patented process, which can also incorporate LVS sunroof technology.

The roof module featured on the DaimlerChrysler Smart Roadster led to the company

The use of textiles in automotive applications includes floorcoverings; upholstery; belts, tubes and tapes; tyre cord; safety belts; airbags; components; and filters. Particularly as a result of higher demand for increased comfort and improved safety, the use of textile materials is forecast to increase from 20 kg in a typical mid-size car in 2000 to 26 kg in 2010 and 35 kg by 2020. Meanwhile, the global automotive interiors market was worth an estimated US\$165bn in 2005 and is on course to grow to US\$210bn over the next 10 years.

Automotive Textiles: The Global Supply Chain to OEMs will help you to identify:

- key trends in the global automotive industry
- principal drivers for automotive interiors
- the market for automotive occupant restraint equipment
- current and future production methods for automotive textiles
- challenges and threats to the increased use of automotive fabrics
- interior automotive fabrics by manufacturing method
- automotive tufted carpet producers and converters in Europe
- future trends in automotive textiles.

Publication date:
May 2007

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ArvinMeritor LVS

The report also contains the latest financial, commercial and marketing information on the most important global companies operating in the automotive textiles industry. It highlights the changing strategies and initiatives of these groups as they seek growth opportunities in this rapidly evolving market.

Automotive Textiles: The Global Supply Chain to OEMs shows how these major players are growing in the expanding automotive textiles market. It will give you invaluable insight into the corporate strategies employed by these leading companies, the competitive threats faced, and new product and market opportunities to be exploited.

The report will help you to:

- plan sound business strategies
- understand and follow the growing market for automotive textiles
- identify market opportunities
- monitor the competition
- save time and money.



An employee of Rieter Automotive Systems in Winterthur, Switzerland measuring the airflow resistance of a Rieter carpet system.

Company profiles

The report features 40 company profiles of leading players in the automotive textiles sector, including:

| | | | |
|--|---------------------------------------|--|------------------------------------|
| Ames Europe | Fezko | Intier Automotive / Magna International | Safety Components International |
| ArvinMeritor LVS | Fibertex | Japan Vilene | Sandler |
| Aunde | Freudenberg Nonwovens | Johnson Controls | Seiren |
| Autoliv | FS Fehrer | Lantal Textiles | Shawmut Industries |
| Carcoustics | Grammer | Lear Corporation | Tachi-S |
| Collins & Aikman | Grupo Antolin | Lydall | Takata |
| Donaldson | Grupo Copo | Polyamide High Performance | Toyobo |
| Eybl International | Guilford | Prevent Group | Toyota Boshoku |
| Faurecia | HP Pelzer | Remploy Automotive | TRW |
| Feltex Holdings / KAP International | International Auto ComponentsGroup | Rieter Automotive | Uniproducts (India) |

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