

# Automotive Textiles

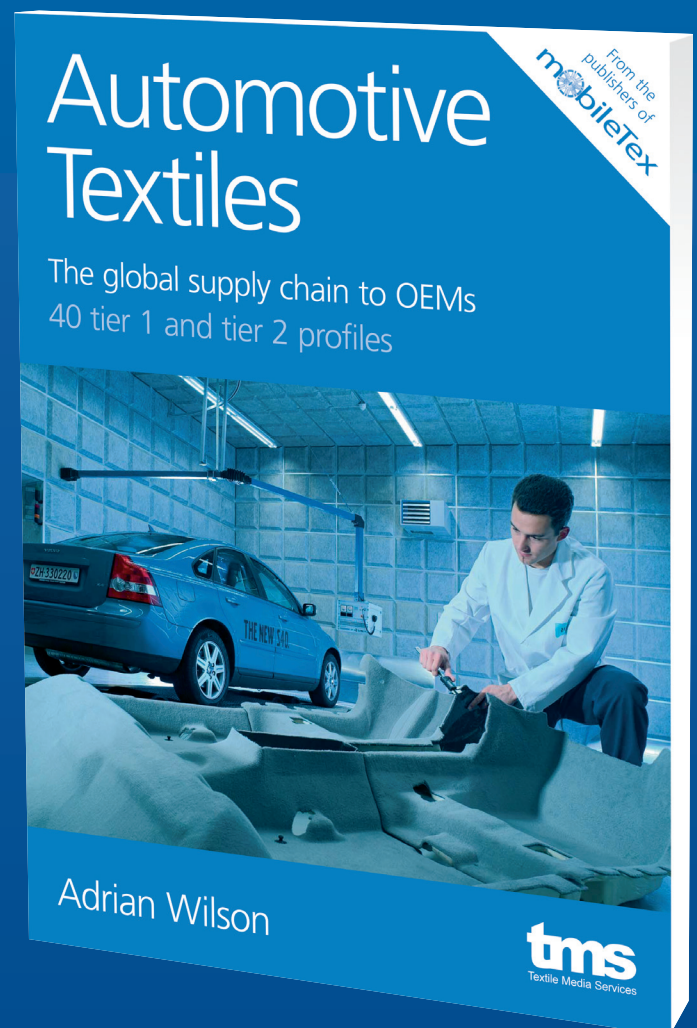
The global supply chain to OEMs  
40 tier 1 and tier 2 profiles

**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.

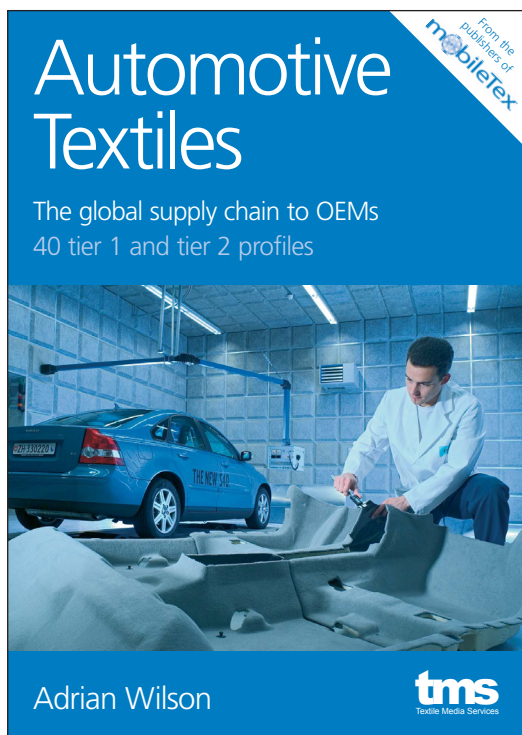
In addition to providing an overview of the global automotive industry and the wide-ranging use of textile materials in vehicles, this new report covers the latest developments with regard to product areas and leading players, bringing together the key themes that are forecast to play a prominent role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



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. Fabrics' 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.

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Automotive Textiles: The global supply chain to OEMs

## 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.

Panclaire 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
<b>Total LVS</b>	<b>61</b>	<b>54</b>	<b>53</b>

Source: ArvinMeritor

### ArvinMeritor CVS, sales by product (%)

	2004	2005	2006
Undercarriage and Drivetrain Systems	35	40	43
Specialty Systems	6	6	6
<b>Total CVS</b>	<b>41</b>	<b>46</b>	<b>47</b>

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
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