

WHITEPAPER

International automotive and supplier industry: Market sizing



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How big is the automotive and supplier industry, and how many participants are there worldwide?

At first glance, these questions may seem trivial, but with a closer look you may notice they are not so easy to answer. Dun & Bradstreet has analyzed its global database of more than 500 million company profiles to find the most accurate answer.

The starting point for the analysis is the industry classification of the companies. Taken all together by company classification for manufacturers of motor vehicles and their suppliers, the result is 28,654 companies. But that doesn't cover the full spectrum of market participants.

Analysis of the international automotive and supplier industry

There are 7,657 manufacturers of motor vehicles worldwide. However, it must be taken into account, that:

a) The label "manufacturers of motor vehicles" is not restricted to manufacturers of passenger cars; it also includes thousands of manufacturers of trucks, a wide variety of commercial vehicles and even agricultural machinery.

b) To an increasing extent manufacturers of motor vehicles also act as suppliers. After decades of streamlining production and concentration on the core product, the transition to electric mobility has led to re-diversification. Manufacturers are producing critical components - such as batteries - themselves.

With regard to the supplier industry, the situation is complex in different ways:

a) The 22,414 supplier companies (including. manufacturers who are also active suppliers) does not equate to the total number of suppliers – there are many more. A large number of companies that supply the automotive industry with standard parts, connecting and fastening technology, but also electronic parts or components are classified as metalworking companies or semiconductor manufacturers.

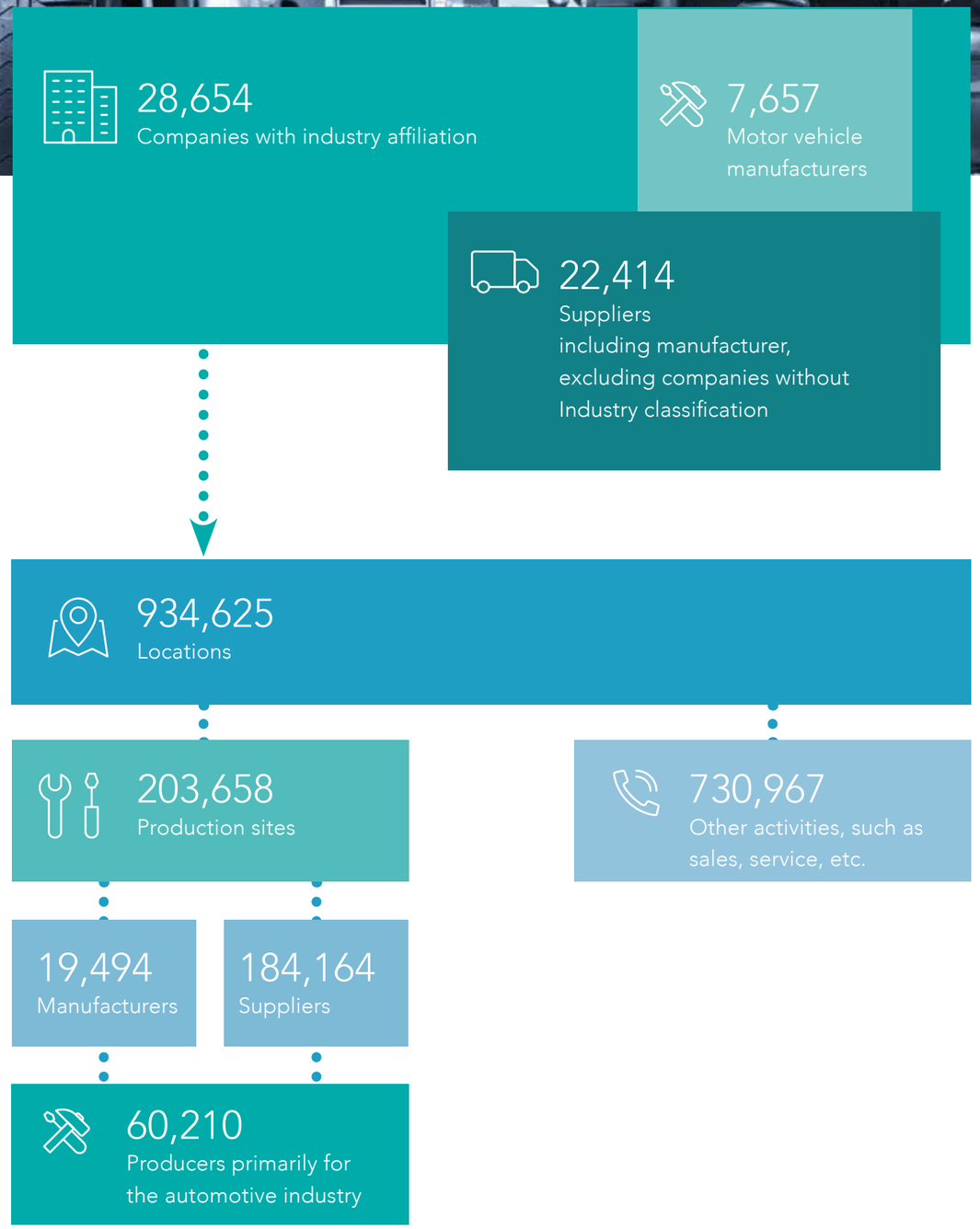
b) The 22,414 supplier companies themselves cannot be seen as belonging to Tier Level 1 as a whole. As the example of manufacturers already shows, they can be assigned to different tier levels – and even simultaneously.

With these findings as a background, what can be said about the global presence and business activities of the identified 28,654 companies? For now, these are only the locations of the group companies that are represented via subsidiaries and branches. And these at a total of 934,625 locations. This huge number includes all activities of the companies - finance, marketing, fleet, sales, services, and production.

In fact, this figure conceals 203,658 production sites (i.e. manufacturing subsidiaries, branches, plants, etc.). Of these, 19,494 locations relate to the manufacturers of motor vehicles, and 184,164 to the supplier industry.

However, not all locations in the industry manufacture exclusively for the industry - a large number of the companies are more or less diversified and produce a number of different products, which also address different needs and markets. Ultimately, there are 60,210 locations, where production is primarily to support the automotive industry.



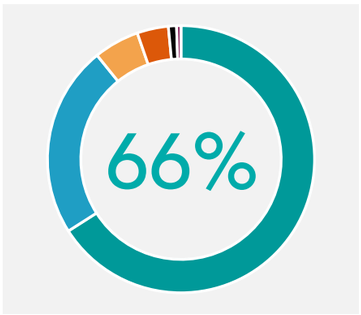


What are the most significant markets for the automotive and supplier industry?

GLOBAL DISTRIBUTION OF COMPANIES

More than 50% of the companies are based in Asia (18,903), followed by a high percentage in Europe (6,652) and then North America (1,578).





Asia	18,903
Europe	6,652
North America	1,578
South America	1,087
Oceania	282
Africa	152
Total	28,654

TOP 10

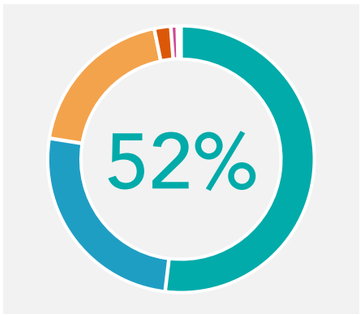
The TOP TEN is now dominated by China (8,923), followed by India (4,289) and Japan (4,010). In 4th place - rather surprisingly – Italy (1,234) - is on a par with the USA (1,219) and then Germany (936).

1	China	8,923
2	India	4,289
3	Japan	4,010
4	Italy	1,234
5	USA	1,219
6	Germany	936
7	Brazil	764
8	Spain	633
9	France	586
10	Korea	559

GLOBAL DISTRIBUTION OF PRODUCTION SITES

When looking at the locations (and here it is first of all the production locations of the manufacturers and suppliers), there is no change in the continental ranking. More than half are located in Asia (105,706), one quarter in Europe (52,159), and 20% in North America (39,224).





Asia	105,706
Europe	52,159
North America	39,224
South America	4,057
Oceania	1,586
Africa	925
Total	203,658

TOP 10

The picture changes for the TOP TEN in the country rankings - the USA (33,689) is at the top of the list in terms of the number of production sites, followed by India (33,555), China (32,066) and Japan (30,693) at about the same level. Germany (11,883) follows in 5th place, then Italy (6,716) in 6th place.

1	USA	33,689
2	India	33,555
3	China	32,066
4	Japan	30,693
5	Germany	11,883
6	Italy	6,716
7	England	5,270
8	France	5,203
9	Spain	3,736
10	Poland	1,890



How do such shifts come about?

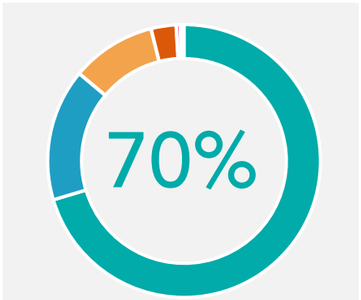
The reason for these shifts lies in the different degree of concentration of production in the corporations. While American companies have an average of 25 production sites and German companies have 19, Japanese companies have an average of only 10 and the Chinese, Indian and Italian companies between three and six locations.

The latter markets, especially China, are clearly characterized by smaller companies with a smaller number of production sites.

GLOBAL DISTRIBUTION OF SUPPLIER SITES

The picture changes once again when we look at those 60,210 locations that are primarily suppliers to the automotive industry. The ranking of the continents does not change - Asia dominates (42,386) but with two-thirds of all locations. Europe (9,431) still accounts for one in six, and North America accounts for only one in ten.





Asia	42,386
Europe	9,431
North America	6,044
South America	1,792
Oceania	300
Africa	257
Total	60,210

TOP 10

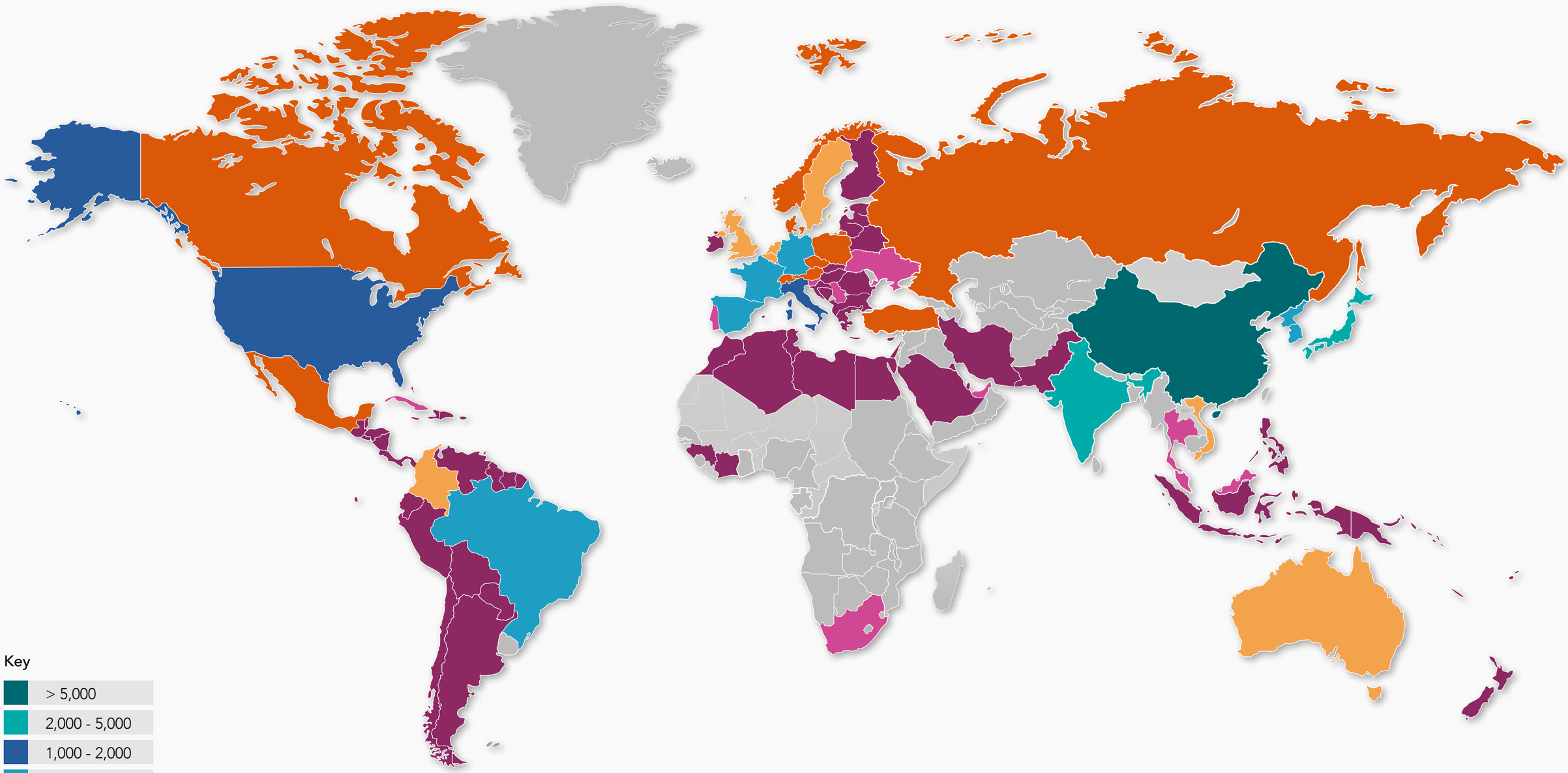
In the country rankings, the order changes again - now the Asian companies from India (14,442), China (13,933) and Japan (11,429), are well ahead of the USA (4,620) and Germany (2,175). This also allows conclusions to be drawn about a possible higher degree of diversification of the American and German applies in part to Japanese corporations.

1	India	14,442
2	China	13,933
3	Japan	11,429
4	USA	4,620
5	Germany	2,175
6	Italy	1,646
7	Spain	1,159
8	England	888
9	France	559
10	Poland	363

Does this analysis mean that the entire automotive and supplier industry is covered? No, not by a long shot. We still need to take a look at the supply chains. As already stated, the companies analyzed are themselves companies already represented as suppliers in various or are based in various tier levels - but detailed information on this can’t be found in the sector classification, which was not the focus of this analysis.

Companies worldwide

[Total: 28,654]



Key

- > 5,000
- 2,000 - 5,000
- 1,000 - 2,000
- 500 - 1,000
- 200 - 500
- 100 - 200
- 50 - 100
- < 50

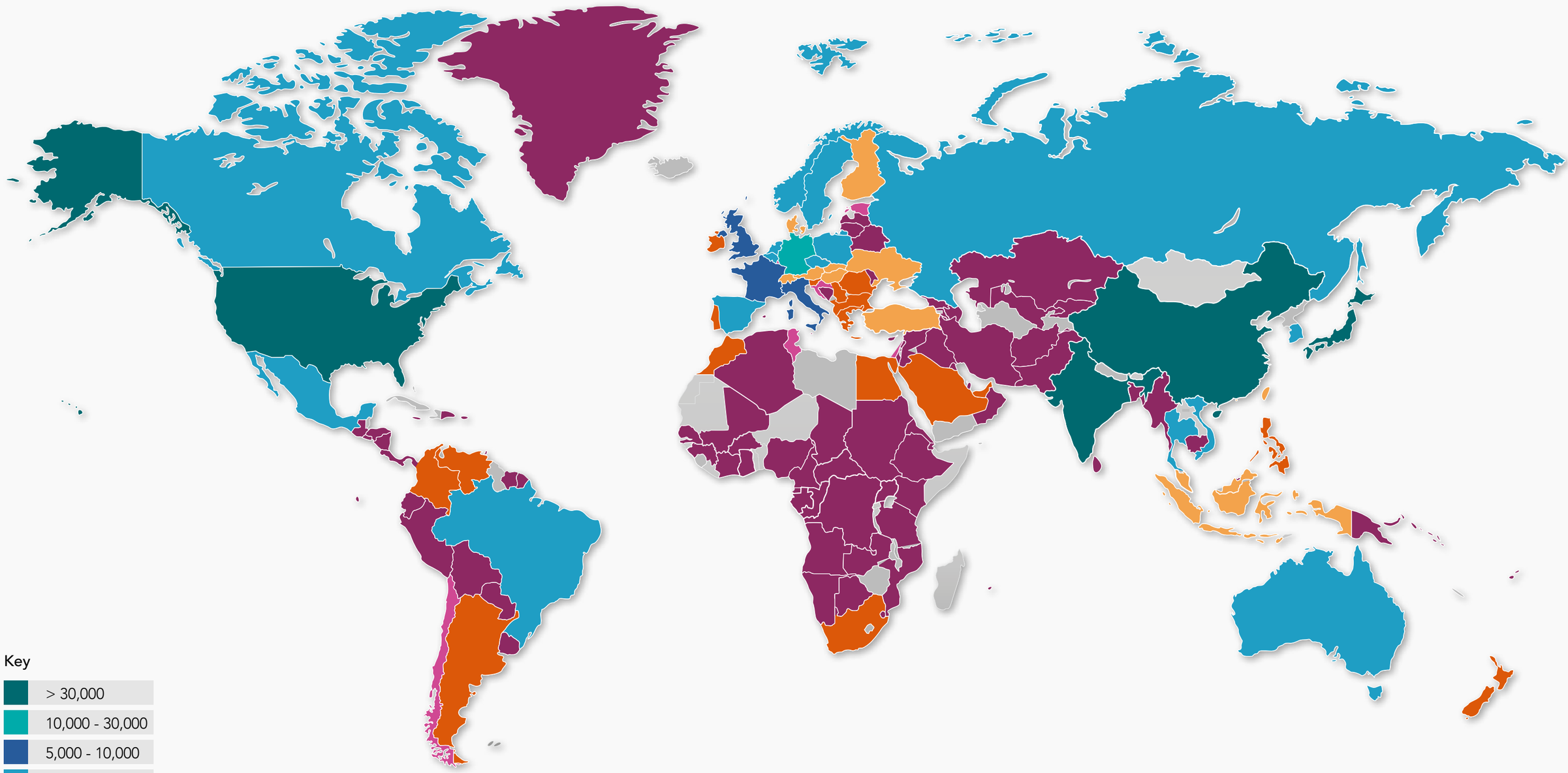
DETAILED OVERVIEW

China	8,923	Singapore	48	Kazakhstan	5
India	4,289	Greece	46	Guadeloupe	5
Japan	4,010	Hungary	42	Algeria	5
Italy	1,234	Romania	38	Bosnia-Herzegovina	4
USA	1,219	Slovakia	34	Barbados	4
Germany	936	Israel	34	Uzbekistan	3
Brazil	764	Ireland	34	Tunisia	3
Spain	633	Serbia	33	Sri Lanka	3
France	586	Indonesia	27	Panama	3
Korea Rep Of	559	Slovenia	26	Latvia	3
England	476	Egypt	26	Qatar	2
Belgium	412	Cayman Islands	25	North Macedonia	2
Netherlands	368	Philippines	22	Nigeria	2
Colombia	277	Estonia	22	Montenegro	2
Vietnam	272	Argentina	22	Moldova	2
Hong Kong	269	Scotland	21	Martinique	2
Sweden	262	Bulgaria	19	Marshall Islands	2
Australia	250	New Zealand	18	Macao	2
Russian Federation	168	Croatia	16	Lebanon	2
Turkey	154	Venezuela	15	Gibraltar	2
Canada	153	Kuwait	14	Ecuador	2
Mexico	152	Cyprus	14	Curacao	2
Poland	150	Wales	13	Bangladesh	2
Taiwan	133	Northern Ireland	13	Uruguay	1
Norway	122	Mauritius	13	Trinidad & Tobago	1
Austria	113	Malta	12	Samoa American	1
Switzerland	109	Iran	11	Oman	1
Czech Republic	101	Samoa	10	Lithuania	1
Denmark	100	Morocco	10	Kyrgyzstan	1
Ukraine	94	Saudi Arabia	9	Kenya	1
United Arab Emirates	90	Reunion	8	Jordan	1
Thailand	90	Bermuda	8	Iceland	1
Virgin Islands UK	67	Liechtenstein	7	Georgia	1
Malaysia	67	Bahrain	7	Fiji	1
South Africa	65	Pakistan	6	Costa Rica	1
Luxembourg	65	Chile	6	Bonaire St Eust Saba	1
Portugal	54	Belarus	6	Belize	1
Finland	49	Seychelles	5	Anguilla	1



Production sites worldwide

[Total: 203,658]



DETAILED OVERVIEW

USA	33,689
India	33,555
China	32,066
Japan	30,693
Germany	11,883
Italy	6,716
England	5,270
France	5,203
Spain	3,736
Brazil	3,034
Mexico	2,776
Canada	2,583
Korea Rep Of	1,937
Poland	1,890
Belgium	1,701
Netherlands	1,587
Russian Federation	1,554
Sweden	1,491
Czech Republic	1,406
Thailand	1,367
Vietnam	1,347
Australia	1,201
Norway	1,173
Hungary	858
Turkey	841
Finland	794
Indonesia	749
Switzerland	727
Malaysia	716
Austria	704
Taiwan	677
Ukraine	656
Hong Kong	653
Denmark	647
Slovakia	563
Singapore	540

United Arab Emirates	466
Philippines	440
Portugal	419
New Zealand	379
Colombia	362
Romania	361
Scotland	350
South Africa	345
Argentina	292
Wales	268
Serbia	267
Ireland	176
Morocco	155
Venezuela	145
Slovenia	143
Greece	139
Saudi Arabia	133
Bulgaria	118
Egypt	109
Northern Ireland	98
Israel	96
Chile	94
Luxembourg	73
Tunisia	67
Estonia	65
Croatia	63
Peru	44
Lithuania	41
Pakistan	39
Iran	38
Kuwait	37
North Macedonia	36
Ecuador	35
Latvia	34
Uruguay	33
Nigeria	33

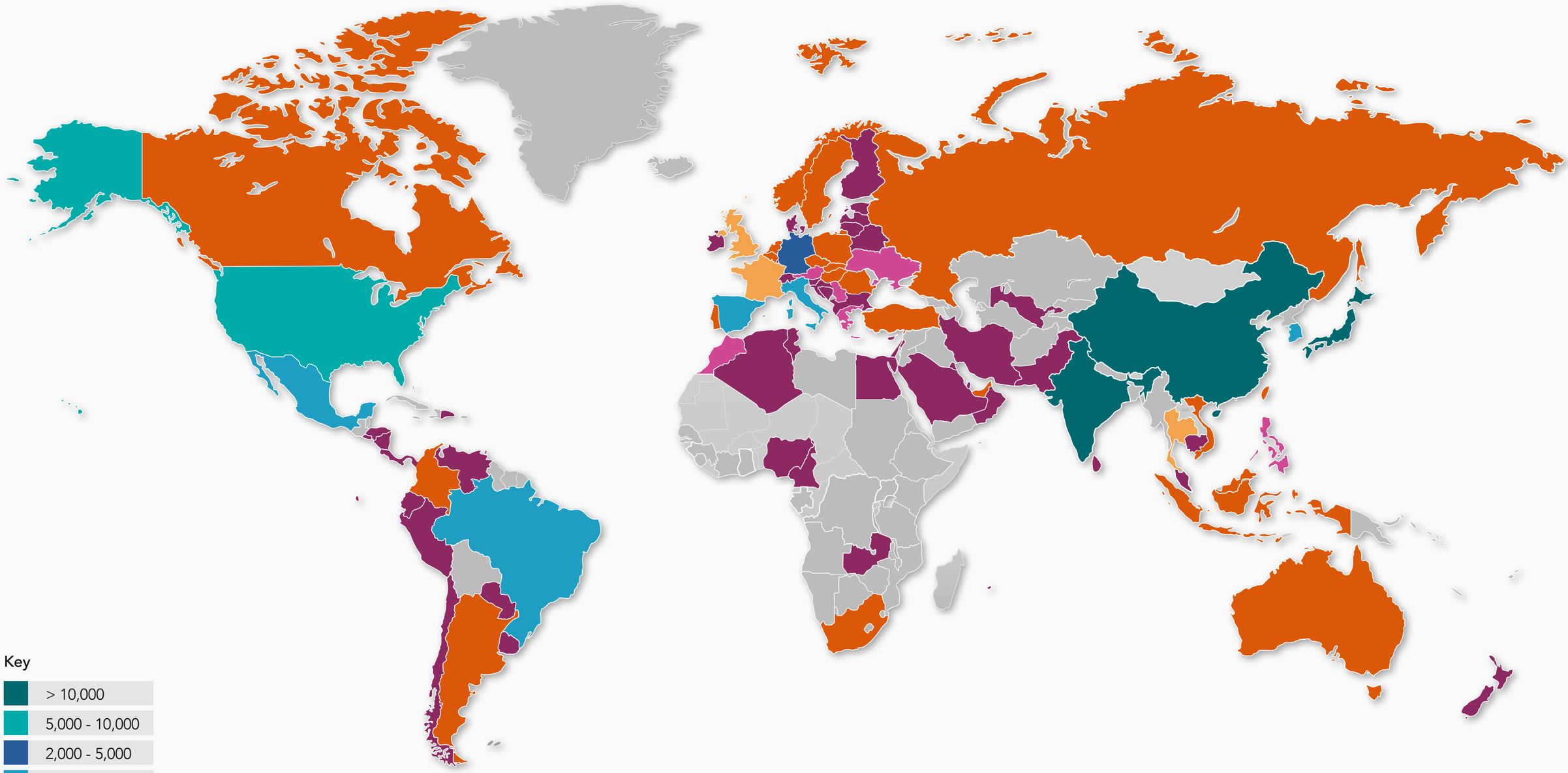
Costa Rica	32
Reunion	29
Bahrain	28
Oman	26
Panama	25
Dominican Republic	25
Guatemala	22
Moldova	21
Bosnia-Herzegovina	21
Algeria	21
Malta	20
Qatar	19
Sri Lanka	18
Namibia	18
Belarus	17
Kenya	16
Bangladesh	15
Uzbekistan	14
Guadeloupe	13
Jordan	11
Honduras	11
Zambia	10
Martinique	10
Kazakhstan	10
Ivory Coast	10
El Salvador	10
Paraguay	9
Mauritius	9
Liechtenstein	9
Lebanon	9
Macao	8
Ethiopia	8
Cyprus	8
Barbados	8
Nicaragua	7
Montenegro	7

Ghana	7
Trinidad & Tobago	6
Tanzania	6
Myanmar	6
Syria	5
Mozambique	5
Georgia	5
Botswana	5
Bolivia	5
Mali	4
Jamaica	4
Cape Verde	4
Cameroon	4
Cambodia	4
Albania	4
Senegal	3
Kosovo	3
French Guiana	3
Burkina Faso	3
Angola	3
Uganda	2
Sudan	2
Papua New Guinea	2
Monaco	2
Iraq	2
Congo	2
Armenia	2
Virgin Islands UK	1
Suriname	1
Samoa American	1
Samoa	1
Kyrgyzstan	1
Guinea	1
Guam	1
Greenland	1
Gibraltar	1

Gabon	1
Fiji	1
Eswatini	1
Eritrea	1
Equatorial Guinea	1
Djibouti	1
Curacao	1
Congo Democratic Rep	1
Chad	1
Central African Rep	1
Brunei	1
Bermuda	1
Azerbaijan	1
Aruba	1
Andorra	1
Afghanistan	1

Production sites worldwide, primarily automotive industry

[Total: 60,210]



DETAILED OVERVIEW

India	14,442	Argentina	103	Bosnia-Herzegovina	6
China	13,933	Ukraine	92	Uruguay	5
Japan	11,429	Serbia	82	Moldova	5
USA	4,620	Philippines	67	Malta	5
Germany	2,175	Morocco	63	Latvia	5
Italy	1,646	Austria	63	Paraguay	4
Brazil	1,397	Greece	58	Nicaragua	4
Spain	1,159	Wales	56	Guadeloupe	4
Korea Rep Of	1,154	Scotland	53	Belarus	4
Mexico	1,056	Denmark	48	Uzbekistan	3
England	888	Slovenia	41	Trinidad & Tobago	3
France	559	Switzerland	33	Hong Kong	3
Thailand	554	Bulgaria	27	Ecuador	3
Poland	363	Venezuela	25	Costa Rica	3
Canada	347	Kuwait	25	Algeria	3
Belgium	281	Finland	25	Panama	2
Turkey	280	New Zealand	22	Pakistan	2
Australia	276	Croatia	18	Nigeria	2
Colombia	246	Singapore	17	Liechtenstein	2
Sweden	214	Saudi Arabia	17	Honduras	2
Indonesia	202	Tunisia	16	El Salvador	2
Russian Federation	201	Israel	16	Cyprus	2
Czech Republic	194	Egypt	15	Zambia	1
Taiwan	164	Reunion	13	Sri Lanka	1
Slovakia	144	Ireland	13	Samoa American	1
Hungary	139	Northern Ireland	11	Samoa	1
Portugal	137	Lithuania	11	Peru	1
Norway	131	Iran	11	Lebanon	1
Malaysia	124	North Macedonia	9	Kosovo	1
Vietnam	123	Chile	8	Dominican Republic	1
Romania	120	Bahrain	8	Cameroon	1
South Africa	118	Luxembourg	7	Cambodia	1
Netherlands	118	Oman	6	Albania	1
United Arab Emirates	106	Estonia	6		

About the author



Michael Seifert

Senior Manager Industries
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VITA

Michael Seifert, graduate philosopher, studied philosophy in philosophy in Rostov-on-Don, Russia, until 1984.

Since 2001 he has been working for Dun & Bradstreet (Bisnode Germany from 2012 to 2021) in various positions. In 2002 he was one of the founding members of the D&B European Purchasing Network.

Michael has many years of national and international experience in advising companies and supports companies in particular in the development and implementation of data-driven business processes and models. His consulting focus is on master data management, risk and compliance management and analytical solutions for business partner assessment.

Since 2018, he has been responsible for business field development and consulting in the automotive and supplier industries.

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