



Market Survey on Automobile and its Parts Industry in Germany

German Automobile Industry

Overview

Germany has been one of the most important automobile producing country in the world. Simple statistic relating to the production of the automobile in Germany explains it all. In the year 2004 alone around 5.6 million vehicles were produced in Germany. If we were to include all the vehicles produced by the German companies abroad, it would easily surpass a million mark. Around 4.8 million vehicles were produced by German companies in their production facilities beyond its borders. The most important production facilities have emerged in the erstwhile East European Socialist Countries and in China.

Based on the strong growth in the car industry, globally Germany has emerged as the second largest vehicle manufacturer in the world only after Japan and also over taking US. The German automobile industry is also the largest employer directly absorbing around two per cent of its workforce in the year 2003 leaving aside others who are indirectly employed and dependent on the automobile industry for its existence. German vehicles manufacturer have a huge brand loyalty and are known worldwide for their technical expertise and reliability.

Investments

German automobile sector accounts for major investment in Germany. It continues to invest heavily in Germany upgrading its infrastructure, production facilities, research and development.

In the five years the German car majors have invested more than Euro 50 billion, accounting for approximately of all investment in industry in Germany. Alone in 2004, the investment was approximately 12 billion euros. Over the last ten years, the German automotive industry has invested 127 billion euros in research and development. In 2004 R&D expenditure in this sector amounted to 15.6 billion euros. This sector accounted for one third of the national economic expenditure on R&D.

German Automotive Industry : Export is the key driver

Exports has been key driver of the industry and this fit very well with the overall strategy of globalisation. The globalisation strategy has generally led the industry to increase its production of the vehicles not only in Germany but also around the globe. German cars are produced in a total of 24 countries with every sixth vehicle produced globally in 2004 had a German brand name.

Germany because of its strong drive for exports have been able to push up production volumes not only in Germany but also in

other countries where it has presence. In Germany the manufacturing volume has crossed 5 million vehicles mark alone. This is directly the result of a buoyant market for German vehicles in the global market. The domestic market has been sluggish and has not witnessed much of growth due to weak macro-economic growth in Germany. If it was not for the strong export drive the German economy would be much weaker than the position it recorded.

As exports have been the mainstay of the German vehicle industry, briefly we have touched the global automotive industry to trace the future trend for the German auto makers.

The Global Automotive Industry : Its economic impact

The automotive industry has been the single most driver of the developed world. It is not surprising that the US, Japan and Germany owe their economic success to the rapid development of the automotive industry. The derived demand for the supporting industries arising out of the accelerated growth in the motor vehicle market has had a profound effect on the economic growth of the nation.

The global automotive industry has grown rapidly in the last decade, so much that the landscape, globally, has undergone dramatic changes with the emergence of new production facilities and markets. Companies have been continuously readjusting their strategies to the ever changing and emerging demands of the new markets.

Globally the car market had a good time in the year 2004. Some of the general highlights of the global car market in the year 2004 :

- Increased growth in car sales in the US and European market
- Sales were higher in the Mercosur region
- Car sales in Central and Eastern Europe recorded higher growth
- Asian market specially China and India have recorded phenomenal growth.

World Automobile Production in 2004 : Per cent Share in world production

EU-15	26.7
New EU countries	2.3
Eastern Europe	4.0
NAFTA	25.8
Mercosur	3.9
China	8.1
Japan	16.7
India	2.4
Other countries	10.0



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Healthy growth of the Global Automotive Industry : Its impact on German car makers

In the year 2004, German car maker had a robust growth year and achieved a new export volume delivering approximately 3.7 million cars to the global market. Global market has become increasingly important for Germany, this would be very well understood that only a decade ago 50 per cent of all car produced in Germany were exported and now this has risen to approximately 70 per cent of all production. The principal market for German car exports are the European countries delivering 2. 4 million to EU 25 in 2004, nearly 1,41000 cars to new EU member states. The UK is the single most important market for German cars. Other countries like Turkey are increasing absorbing more vehicles.

China : Emerging strong player

The China factor has been dominant in every sphere of manufacturing activity in the last one and half decade; its influence is strongly felt in the automotive industry as well.

Here we would briefly touch upon the impact it is having on the European automotive industry and more particularly the shaping of the industry structure in Europe and more particularly the German car industry.

China has emerged as a major car market in the world. Its phenomenal growth would change the landscape of the future global car market.

Today China is a net importer of car parts, components and accessories but this would however change in the future. New car parts, components and accessories manufacturers are likely to emerge shortly. As of today there are enough manufacturers producing presently for the major auto makers and these companies would be the new entrant in the world market.

China has impacted the European manufacturers of cars, car parts and components by influencing them to look for places where they could shift their production facilities offering lower cost than the present high cost production bases. For example German auto manufacturers as well as OEM have shifted to former Eastern countries which offer them low manufacturing costs and other benefits such as being closer to the emerging economies.

The European automotive industry structure would have to change in light of the new trends emerging from the Asian player like China and India.

The competitive edge of the various European manufacturers which had its strength in the technological edge of its car manufacturing process will no longer drive the market. It would essentially concentrate on offering competitive products at a level of existing technology. The winner in the market by all accounts would be the companies that show higher degree of adaptability to the dynamic changing industry scenario.

Characteristics of the Auto Parts Market in Germany

Overview of the Auto Parts and Accessories Market and some of the salient features are outlined below

German automobile sector is supported by very dynamic auto parts and accessories manufacturers. Employment of this sector accounted for over 40 per cent of all jobs in the automotive industry.

The suppliers are in close proximity to the automobile manufacturers facility. Therefore location plays a very important role in the choice of the suppliers to the industry. Having mentioned this characteristics of the industry, new emerging locations like Eastern Europe have forced OEM to shift base to satisfy the demand of these new centres.

Market Structure

The market structure for the auto parts industry can be divided into two categories namely the Original Equipment manufacturers which normally service the Original manufacturers of the automobile manufacturers and then there are the aftermarket segments.

Some of the OE automobile manufacturers in Germany are

VOLKSWAGEN AKTIENGESELLSCHAFT

Internet : www.volkswagen.de

SKODA

Internet : www.skoda-auto.com

SEAT - Spain

Internet : www.seat.de

AUDI AG

Internet : www.Audi.de

BAYERISCHE MOTORENWERKE

Internet : www.bmw.de

FORD-WERKE AKTIENGESELLSCHAFT

Internet : www.Ford.de

ADAM OPEL AG - General Motors European Operations

Internet : www.opel.de/www.gmsupplypower.com

DAIMLER-BENZ

Internet : www.media.daimlerchrysler.com

PORSCHE AKTIENGESELLSCHAFT

Internet : www.Porsche.com

Some of the important brands in the German market

German brands

AUDI, BMW, Mercedes, Opel, Smart, Porsche, Volkswagen

European brands

Renault, Land Rover, Fiat, Citroen, Peugeot, Seat, Skoda, and Volvo



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Japanese brands

Daihatsu, Fuji Subura, Honda, Toyota, Mazda, Mitsubishi, and Nissan

Other brands

Hyundai, Kia, Chrysler etc.

Distinguishing characteristics of the Auto Parts Market

Auto parts market can be distinguished by classifying into two major groups :

1. The Original Auto Parts
2. The Replacement Auto Parts which are very distinct from the above as they are not marketed as Original Auto Parts.

The Original Part market as the names suggest, it is marketed under the original car brand and the distribution of same is controlled by the automobile car manufacturers. The original car parts are manufactured by the Original Equipment manufacturers who are also the suppliers to the automobile manufacturers.

Replacement Auto Parts

Generally this market could be defined as those vehicles which have been on the road for few years and generally those are dependent on the wear and tear of the vehicle. The category of vehicles would be in the age of seven to eight years old onwards which would have witnessed extensive wear and tear. The OEM supplies as well as the non-OEM brands would cater to this segment of the market.

The average age of the car in 1960 was 3.7 years and by the year 1995 the age had risen to 6.8 years. The year 2005 saw the average age of the car climbed to 7.8 years. Considering this the aftermarket for auto parts and service has risen dramatically and has seen large volume growth over the decade. The volume of auto parts and service growth are attributed directly to increasingly average life of the vehicle as well as the stagnating demand in Germany due to the weakness in the German economy.

Electronic system is increasingly employed by auto manufacturer's right from the construction of the engine and to the smallest manufactured parts in the vehicles. The trend would continue to rise and role of electronics in the value chain would assume importance.

International Trading Scenario for Auto Parts and Accessories

Germany has been major trader of imports as well as exports for auto parts and accessories in the global market. Analysis undertaken mainly concentrate on the import side of the trade for auto parts and accessories.

Statistics below indicate that Germany's imports from the world are significant. Separately in appendixes at the end of the survey are given to serve as a guideline and also to indicate some of the important products that have import potential in Germany.

Market Size

The import market size for the auto parts and accessories in Germany covered by HS code 8708 is estimated to be around USD 18,192,509,000 in the year 2004 which rose from USD 14,990,981,000 in 2003. in the year 2002 the level was USD 12,001,133,568 which would suggest that steep rise on year to year basis. The market size is much larger than the above figure would indicate if we were to include some parts falling under different categories other than mentioned above.

Imports of Auto Parts and Accessories from the world by Germany under HS code 8708 level.

	<i>Value in US\$</i>		
Import into	2002	2003	2004
Germany	12,001,133,568	14,990,981,000	18,192,509,000

Germany's Import from India

In the year 2004 (Jan. to Dec.), Germany's import from India was to the tune of approximately USD 88.385 million for auto parts and accessories category under the HS code 87, which jumped from a level of USD 57.064 million in the year 2003 (Jan.-Dec.) whereby registering a percentage change of 54. 89 per cent over 2003 in the year 2004.

India's top-10 product groups, 2001-2003

	<i>Euro thousand</i>		
	2001	2002	2003
Total imports	300,231	324,986	377,892
Engine parts	40,386	46,087	58,329
Fuel pumps	25,343	35,352	32,273
Tyres new	11,812	18,554	29,965
Generators	24,113	25,847	22,085
Starter motors	13,324	9,973	17,653
Road wheels	10,308	14,548	17,173
Wiring sets	24,463	14,484	14,757
Lighting	12,405	14,194	14,012
Axles	4,430	6,586	11,380
Brakes (Servos)	6,878	8,610	10,878

(Source : Eurostat 2005)

Some of the auto parts which are being imported into Germany from India are given at the end of the survey for reference.

Marketing in Germany

To have successful strategy for marketing of auto parts and related products one needs to understand the trade channels or the channel of distribution for these products.

The use of the trade distribution channels would depend on the target market. Some of the products would ideally be suited for the OEM market and others for the aftermarket segment.



Use of agents, importers, wholesalers are usually the mode followed by most of the first time entrants in the German market as this facilitates easy learning as well as gives the opportunity to gauge the pulse of the market.

Practices followed in Germany

- Foreign companies having operation in Germany; they follow their own distribution channel.
- Companies with bases in Germany; advantage of local knowledge and therefore operate through the normal channel of distribution such as agents, importers or wholesalers.
- Other mode of entry are through joint venture, licensing agreement and through mail order business (generally for replacement parts).
- Use of do-it-yourself stores, repair shops are recommended for the replacement products and approved dealers.

Marketing Tools

Participation in Trade Fairs are highly recommended and it is easily best mode of entry for any company. Some of the specialised Auto Fairs are listed at the end of the survey.

Indian companies having desire to have a long term presence in Germany are well advisee to participate in some of the specialised fair for the automobile sectors. There is no substitute for participation and this tool is found to be most effective to access the German market.

When marketing your products or services in Germany, it is highly recommended that you visit Germany on a regular basis and develop trust with the contact developed during the visit.

Companies are also advised to have good presentation material ready when coming to Germany so that the first impression during the initial contact goes a long way for developing a healthy outlook for the products and the company in general. A long term partnership is what is looked upon by the German buyers.

Conclusion

Globalisation has opened new avenues as well as challenges. Opportunities in the auto parts market are in abundance but there are challenges as well, some of these are from countries which are well entrenched and know the market by their back of the hand. Some of the major challenges of globalisation are that market forces are becoming dominant and are playing an ever increasing role in deciding what trends would the future hold, for example, Globalisation has made the markets very competitive, therefore the natural result of competitive markets is to learn efficient ways of doing the same job without losing quality. The downward pressure on cost has opened numerous opportunities for countries like India which are well placed to take the advantage of a new trend in Western Europe as well in Germany.

Appendix 1

Useful contact addresses of Automobile Parts, System Suppliers and Distributors of Vehicle Parts in Germany

Automotive Manufacturers/OEM Suppliers

MOLL GmbH + Co. KG
P. O. Box 1120, D-96225 Bad Staffelstein
Angerstraße 50, D-96231 Bad Staffelstein
Tel. : +49 (0) 95 73/96 22-0
Telefax : +49 (0) 95 73/96 22-11
E-mail : info@moll-batterien.de
Website : www.moll-batterien.de
Products : Storage batteries.

Alfmeier Präzision AG Baugruppen und Systemlösungen
Industriestr. 5, 91757 Treuchtlingen, Germany
Tel. : +49 (0) 9142/700
Fax : +49 (0) 9142/977 999
E-mail : empfang@alfmeier.de
Products : Engine systems, seatings, fuel systems.

ALLGAIER WERKE GmbH
Postbox 40, 73062 UHINGEN, Germany
Tel. : +49 7161 301-0
Fax : +49 7161 32452
E-mail : info@allgailer.de
Products : Pressed parts and components made of steel and aluminium, body work components, developments of fuel tanks.

ALLIGATOR Ventilfabrik GmbH
Richard-Steiff-Straße 4, D-89537 Giengen/Brenz, Germany
Tel. : +49 (0) 7322/130 1
Fax : +49 (0) 7322/130 359
E-mail : info@alligator-ventilfabrik.de
Website : www.alligator-ventilfabrik.com
Products : Valve cores and caps, extension caps, valve caps, bicycle valves, motorbike/scooter valves, adapter, passenger car : metal valves, snap-in valves, tire pressure control systems (TPMS), car valves for tube type tyre tractor; valves, tyre inflating clip-on connectors, individual parts, earthmoving (EM) vehicles : rim valves, valve stem, EM valve, clamp in valves, valve extensions, valve tool, rethreading tool, special tools, valve screw driver.

VOSS Holding
GmbH + Co. KG
Leiersmühle 2-6, D-51688 Wipperfürth
Postfach 1540, D-51679 Wipperfürth
Tel. : +49 2267 63-0
Fax : +49 2267 63-5018
E-mail : info@voss.de
Products : VOSS Automotive is a specialist in line and connection technology for pneumatic, fuel and hydraulic applications in commercial vehicles and passenger cars.



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Argillon GmbH
Bahnhofstr. 43, D-96257 Redwitz
Tel. : ++49-9574-81-0 Fax : ++49-9574-81-600
E-mail : info@argillon.com
Website : www.argillon.com

Products : Emissions control product - World-market leader with over fifteen years of operating experience in more than 500 fossil-fired combustion plants, stationary diesel engines, boiler furnaces and many other areas of application, insulators for power generation application, components of Alumina; Application in electrically engineering.

AutoSysteme GmbH
Rohrdamm 7, 13629 Berlin
Tel. : +49 (0) 30 38648-300 Fax : +49 (0) 30 38648-309
E-mail : info@autosysteme.de
Producers of vehicle electrical systems.

HUGO BAUER GmbH & Co.
Georgestraße 16
D - 42719 Solingen, Germany
Postfach 1901, D-42701 Solingen, Germany
Tel. : +49 (0) 212-390 0 Fax : +49 (0) 212-390 200
E-mail : info@hugo-bauer.de
Products : Metal products for brake lining manufacturers.

Behr GmbH & Co. KG
Mausersstrasse 3, 70469 Stuttgart, Germany
Tel. : +49 (0) 711/896-0 Fax : +49 (0) 711/896-40 00
E-mail : info@behrgroup.com
Products : Vehicle air-conditioning systems, air cooling, thermostatic devices, integrated heating systems and/or air-conditioning systems with fans, filters, heater cores, evaporators, air distribution and ducting, dash controls, heating circuits with make-up water pumps and water valves, as well as refrigerant circuits including compressors and hoses, and further components such as auxiliary heaters.

Benteler Automobiltechnik GmbH
Ford Industrial Supplier Park
Ivenhofsweg 41, 50769 Koeln, Germany
Tel. : +49.52 54.81 - 0
Fax : +49.52 51.40 8 - 346
E-mail : Germany.Automotive@benteler.de
Benteler Automotive has defined its core competencies in these major business units : Chassis, exhaust systems, structures & engine applications.

BERU Aktiengesellschaft
Mörikestraße 155, D-71636 Ludwigsburg
Tel. : +49 7141 132-0
Fax : +49 7141 132-350
Products : Automotive lighting, diesel injection, diesel cold start technology, flame starting-systems, glow plugs, instant start system (ISS), interference suppression devices, heaters (PTC), high voltage connecting system, ignition cables, connectors, Lambda-sensors, spark plugs for the heating industry, ignition/parts for ignition systems contact sets.

BLECHFORMWERKE BERNSBACH AG
PF 1140 · D-08313 Bernsbach
Straße der Einheit 45/47 · D-08315 Bernsbach
Tel. : ++49 (0) 3774 71-0
Telefax : ++49 (0) 3774 71-3 70
Ranges of products : Motor-vehicle parts : sub-assemblies, proto-types, pressed parts, deep-drawn elements and stampings, as well as fuel tanks, tools.

Bosch Aftermarket
Automotive Aftermarket
Auf der Breit 4, 76227 Karlsruhe
Tel. : +49 (0) 721/9 42 - 0
Fax : +49 (0) 721/9 42 - 23 10
Products : Drive belts, batteries, brake systems, electric motors, glow plugs, cabin filters, oil filters, air filters, fuel filters, O₂ sensors, lighting technology, park pilot park distance monitor, windshield wipers, ignition cables, ignition coils, spark plugs, horns, air horns, practical accessories.

Catem GmbH & Co. KG
Gewerbepark West 16, 76863 Herxheim, Germany
Tel. : (0 72 76) 98 54-0
Fax : (0 72 76) 98 54-602
E-mail : info@catem.de
Products : PTC-heater with integrated electronic control unit, heating element devices.

DELPHI Deutschland GmbH
Vorm Eichholz 1, D - 42119 Wuppertal, Germany
Tel. : +49 202 291-0
Fax : +49 202 2912718
Product Range : Shock absorbers, clutch, brakes, filters, air-conditioning, vehicle electronics, and diesel products.

Denso Automotive Deutschland GmbH
Freisinger Strasse 21, 85386 Eching, Germany
Tel. : +49 8165 9440
Fax : +49 8165 66152
Product : DENSO Automotive Deutschland GmbH develops air-conditioning & thermal systems and vehicle components and sells starters, alternators, sensors, emission control components as well as engine management system components.

Business activities : Sales of air-conditioners, heaters, electric/electronic products and power train components. Extended testing facilities : Air-conditioner test benches, low temperature chambers and semi-anechoic rooms for A/C components evaluation and development, vehicle climatic and noise chambers as well as a climatic wind tunnels for vehicle tests. Furthermore facility for material properties evaluation.

Dichtungstechnik Wallstabe & Schneider GmbH & Co. KG
Straße der Dichtungstechnik 2, D-94559 Niederwinkling, Germany
Tel. : +49 9962 201-0
Fax : +49 9962 201-175
Products : O-rings, seals, rubber moulded parts, composite parts, frame seats and coatings.



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DUVE Umformtechnik GmbH
Postfach 1240, D-58804 Neuenrade
Bahnhofstr. 56, D-58809 Neuenrade
Tel. : 02392/699-0
Telefax : 02392/699-111
E-mail : info@duve.de
Website : http://www.duve.de

Haldex Brake Products GmbH
Mittelgewannweg 27, Postfach 10 25 60
DE-69015 Heidelberg
Tel. : +49 6221 7030
Fax : +49 6221 703400
Product : The Brake systems division is a leading supplier of sub-systems and components for air brake and suspension systems for commercial vehicles.

HellermannTyton GmbH
Grosser Moorweg 45
D-25436 Tornesch, Germany
Tel. : +49 41 22 701 1
Fax : +49 41 22 701 400
Website : www.hellermanntyton.de

Kuhnke GmbH
Lütjenburgerstraße 101, D - 23714 Malente
Tel. : +49 (0) 4523 402 200
Fax : +49 (0) 4523 402 201
E-mail : service@kuhnke.de
Products : Pneumatics, relays, solenoids, electronics.

Lincoln GmbH & Co. KG
Heinrich-Hertz Strasse 2-8
D-69190 Walldorf, Germany
Tel. : +49-6227-33-0
Fax : +49-6227-33-259
Website : www.lincolnindustrial.de
Products : Automated lubrication, general lubrication products, grease fittings and accessories, heavy-duty pumps.

Automotive Industry : Products and Applications

SGL CARBON GmbH
Werner-von-Siemens-Str. 18
86405 Meitingen, Germany
Tel. : +49 (8271) 83 - 0
Fax : +49 (8271) 83 - 21 27
E-mail : foils@sglcarbon.de
Businesses carbon electrodes, cathodes, foils, furnace linings, graphite electrodes, process technology for corrosive media.

SGL CARBON GmbH
Drachenburgstrasse 1
53170 Bonn, Germany
Tel. : +49-228-841 352
Fax : +49-228-841 68352
E-mail : ralf.berkessel@sglcarbon.de
Businesses : Automotive & mechanical applications.

TRW KFZ Ausrüstung GmbH
Rudolf-Diesel-Straße 7, D-56566 Neuwied, Germany
Tel. : +49 (2631) 912.0
Fax . +49 (2631) 912.110
E-mail : marketing.germany@trw.com
Products & Technologies : Aftermarket, body control systems, braking systems, commercial steering, engine components, engineered fasteners & components, inflatable restraints, safety electronics, seat belt systems, steering & suspension, steering wheel systems.

WEBER-HYDRAULIK GmbH
Heilbronnerstr. 30
D - 74363 Güglingen, Germany
Tel. : +49 (0) 7135/71-0
Fax : +49 (0) 7135/71-301
E-mail : info@weber.de
Website : www.weber.de
Products : Hydraulic cylinders, pumps, garage equipment.

Visteon European Corporate Office
Visteonstr. 4 - 10, 50170 Kerpen - Germany
Mobile Electronics Products
Hans Eric Destrée
Tel. : +49 2273 5952122
E-mail : hdestree@visteon.com

Replacement Parts Products
Damien Germès
Tel. : +49 2273 5952123
E-mail : dgermes@visteon.com
Products : OEM suppliers.

Distributors of Motor Vehicle Parts in Germany

M. E. H. Bierögel
Motoren und Ersatzteilhandel
Warthweg 13 A, 64823 Groß-Umstadt, Germany
Tel. : +49 6078 913248
Fax : +49 6078 913250
Website : http://www.meh-bieroeegel.com

NOR Vertriebs GmbH
Auf dem Hahnenberg 16
56218 Mülheim-Klärlich, Germany
Tel. : +49 2630 940680
Fax : +49 2630 940688
Website : http://www.nor-as.dk

FRIKA Inh. Ralf Kantenwein
Im Bild 1, 74635 Kupferzell, Germany
Tel. : +49 7944 1014/1015
Fax : +49 7944 1017

GLS Gesellschaft für logistischen Service GmbH
Paul-Gerhardt-Allee 50, 81245 München, Germany
Tel. : +49 89 81404675
Fax : +49 89 81404977
Website : http://www.gls-muenchen.de



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Overseas Information



Günter Hoffmüller GmbH
Ichtershäuser Straße 72, 99310 Arnstadt, Germany
Tel. : +49 3628 61680
Fax : +49 3628 603278
Website : <http://www.hoffmueller.arnstadt.de>

Otto Suhner GmbH
Trottäcker 50, 79713 Bad Säckingen, Germany
Tel. : +49 7761 5570
Fax : +49 7761 557190
Website : <http://www.suhner.de>

Hausmann + Haengen GmbH & Co. KG
Oumunde 4, 28757 Bremen, Germany
Tel. : +49 421 658500
Fax : +49 421 6585011/5012
Website : <http://www.hausmann-haengen.de>

Beinbauer Automotive GmbH & Co. KG
Passauer Straße 9, 94124 Büchlberg, Germany
Tel. : +49 8505 9003-0
Fax : +49 8505 9003-91
Website : <http://www.beinbauer.de>

ThyssenKrupp Bilstein GmbH
August-Bilstein-Straße 4, 58256 Ennepetal, Germany
Tel. : +49 2333 7910
Fax : +49 2333 7914900
Website : <http://www.bilstein.de>

Wessel Fahrzeugteile GmbH & Co. KG
Carsten-Dressler-Straße 6, 28279 Bremen, Germany
Tel. : +49 4 21 84 05-0
Fax : +49 4 21 84 05-201
Website : <http://www.we-fa.de>

ATR International AG
Am Mittelkai 22, 70327 Stuttgart, Germany
Tel. : +49 7 11 91 89 79-0
Fax : +49 7 11 91 89 79-30
Website : <http://www.atr.de>

Auto-Teile-Ring- GmbH
Am Mittelkai 22, 70327 Stuttgart, Germany
Tel. : +49 7 11 9 18 97 90
Fax : +49 7 11 91 89 79 30
Website : <http://www.atr.de>

Haacke GmbH & Co. KG
Rahmenstraße 13-15, 58638 Iserlohn, Germany
Tel. : +49 23 71 8 27 95
Fax : +49 23 71 82 79 87

M. A. K. Machine Trading GmbH
Schippelsweg 53
22455 Hamburg, Germany
Tel. : +49 40 55 59 10-0
Fax : +49 40 55 59 10-10
Website : <http://www.mak-machine-trading.de>

EUFAB GmbH
Champagne 6, 42781 Haan, Germany
Tel. : +49 21 04 4 90 20
Fax : +49 21 04 49 02 20
Website : <http://www.eufab.com>

Bulten-Bufab GmbH
Am Wildzaun 30, 64546 Mörfelden-Walldorf, Germany
Tel. : +49 61 05 4 00 00
Fax : +49 61 05 40 00 40
Website : <http://www.bulten.de>

Vergölst GmbH
Büttnerstraße 25, 30165 Hannover, Germany
Tel. : +49 511 93803
Fax : +49 511 93820217
Website : <http://www.vergoelst.de/haendlersuche>

WSP Werner GmbH
Autoteilehandel Im- und Export
Röntgenstraße 33, 21493 Schwarzenbek, Germany
Tel. : +49 4151 86760
Fax : +49 4151 867626
Website : <http://www.wsp-werner.de>

Autohaus Hassberge
Ohmstraße 4, 97437 Haßfurt, Germany
Tel. : +49 95 21 9 22 00
Fax : +49 95 21 92 20 30
Website : <http://www.auto-hassberge.de>

KÜFA Fahrzeugbau- und Reparatur GmbH
Gewerbeallee 1, 04821 Brandis, Germany
Tel. : +49 3 42 92 7 31 05
Fax : +49 3 42 92 7 51 60
Website : <http://www.polarus.de/kuefa-brandis>

Peter Praunsmändtl GmbH & Co. KG
Goethestraße 14, 85055 Ingolstadt, Germany
Tel. : +49 8 41 50 40
Fax : +49 8 41 50 41 22

Federn Hentz GmbH Fahrzeugteile-Fahrzeugtechnik
Sauerwiesen 38, 67661 Kaiserslautern, Germany
Tel. : +49 63 01 60 50 Fax : +49 63 01 60 51 10
Website : <http://www.federn-hentz.de>

Alfred Hermann GmbH & Co.
Sauerwiesen 38, 67661 Kaiserslautern, Germany
Tel. : +49 63 01 60 50 Fax : +49 63 01 60 51 10
Website : <http://www.federn-hentz.de>

Uwe Jürgen Wagner
Ingenieurbüro - Industrieberatung
Wiesenstraße 5, 72119 Ammerbuch, Germany
Tel. : +49 7032 97520 Fax : +49 7032 975255
Website : <http://www.ujw.de>

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(To be continued at next issue)