The global market review
for vehicle sunroofs

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By Matthew Beecham

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Chapter 1 Introduction

Let the sun shine in

Ever since Mercedes-Benz offered the first car sunroof in 1932, the ways in which vehicle makers have sought to let the sun shine into the cabin have become increasingly complex. Modern sunroofs consist of around 200 parts, and vehicle makers now use them and other roof systems to help differentiate product offerings to customers. The small, rectangular shaped roof window is being superseded by more eye-catching roof designs. The design emphasis these days is less on the old tilt and slide sunroofs and more on glass roofs stretching the length of the car together with smart combinations of convertible and glass roofs.

Innovative hard tops that stow away in the boot space are already beginning to replace standard canvas convertible roofs. Market leader Webasto’s Lamella sunroof, for example, consists of six sliding steel or glass panels that can be vented or completely retracted, enabling an exceptionally large roof opening. Webasto believes that its Full Roof Module, consisting of a modular roof system with multiple glass opening and venting options, will completely replace conventional roofs. These novel sunroofs, convertibles and retractable hardtops give the consumer more choice to suit their lifestyle.

Report coverage

Continuing its series of component market studies, this just-auto.com report reviews these key market drivers for vehicle sunroofs, providing some forward-looking analysis. Based on discussions with the main players, chapter two sets out our forecast for product trends and fitment levels for sunroofs through 2005. Chapter three sets out some recent innovations and the forces driving those technical advances. Chapters four to seven provide brief profiles of the major sunroof manufacturers.
Chapter 2 The market

Market trends

Ever since glass panel sunroofs first appeared in the 1970s, they have evolved in terms of ease of use and installation. Double-spoiler systems enable a larger surface opening. Canvass roofs also continue to appear on some popular car models such as the Renault Twingo, Volkswagen Polo, Nissan Micra and Mazda 121.

Steel-sliding roofs have also become an increasingly popular choice by motorists. In 1996, Webasto published its findings from a consumer study. The German group wanted to know whether car drivers would prefer a steel or glass-sliding roof. While half of respondents said they generally prefer a bright atmosphere under glass, a third said they prefer steel. The results closely match availability in Europe; out of 47 popular cars in Europe, xx (xx%) are fitted with glass sunroofs, 11 (xx%) with steel and six (xx%) offer both.

Consumers now expect an increasingly high level of comfort in their cars, particularly where air conditioning and sunroofs are concerned. Such equipment is no longer the exclusive domain of luxury cars. As the car market becomes increasingly competitive, vehicle makers are using sunroofs and other roof systems to help differentiate the product offerings to customers. It is predicted that by 20x0, half of all new cars sold will have some type of altered roof system, such as convertibles, retractable hardtops, full-glass sliding sunroofs as well as the traditional sunroof.

In addition to adding to driver comfort, sunroofs can also be a valuable safety feature. According to a study conducted by Siena University, the greatly improved ventilation which a sunroof provides plays an important part in active safety. A computer simulation performed by IVM Engineering to measure the circulation and exchange of air in the passenger compartment has confirmed the results of the Siena study.
Germany and the UK are the strongest sunroof markets in Europe. It is estimated that about xx% of vehicle sunroofs across Europe are electric and xx% are manually operated. In the UK, however, British motorists still prefer manually operated sunroofs. The reason for that could relate to the price of electric versus manual; an electric spoiler sunroof is almost twice the price of a manually operated pop-up sunroof. In Germany, there is growing market demand for folding fabric sunroofs. Spoiler sunroofs are not as popular in Germany as they are in the rest of Europe. The reason for that could be due to the way in which folding sunroofs are vigorously promoted in Germany.

**Market size**

While future growth in the European air conditioning sector looks assured, with factory-fit penetration of air conditioning expected to reach nearly xx% by 200x, up from xx% in 19xx, the flipside is, of course, a continued fall in demand for sunroofs. Only xx% of all cars in Europe now have a sunroof, compared with a figure of xx% in 19x.

During a survey commissioned by the German air conditioning supplier Behr, researchers found that among xxx German car owners, the climate control system has become one of the most important features of automotive comfort. During the survey in 200xx, xx% mentioned climate control without prompting, compared to xx% in 19xx. In contrast, the importance of the sunroof has sharply declined from xx% in 19xx to xx% in 20xx. Figure 1 shows these results.
Chapter 2 The market

Figure 1 Behr’s consumer survey

<table>
<thead>
<tr>
<th></th>
<th>1995</th>
<th>2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air conditioner systems</td>
<td>28</td>
<td>53</td>
</tr>
<tr>
<td>Radio/stereo</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Good) seating</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electric windows</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power steering</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sliding roof</td>
<td>34</td>
<td>13</td>
</tr>
</tbody>
</table>

Source: Behr.

In North America, vehicle makers are expected to install about three million sunroofs in 200x (equivalent to xx% of all new cars sold), up from xxx,000 in 19xx. In the United States, installation rates for sunroof systems have grown from xxx% to almost xx% as demand grows for larger, more complex roof systems. It is estimated that about xx% of all sunroofs sold in North America are electrically operated.

One of the main reasons for this growth in the roof systems market is the popularity of sports utility vehicles (SUVs). As drivers trade in their passenger cars for SUVs, they automatically increase the demand for sunroofs.

Demand for convertibles in North America are increasing too. The largest segment of the North American sunroof market is the full-size pick-up truck sector. It is estimated that some xxx,000 convertible roof systems will be produced in North America in 20xx rising to xxx,000 units in 200x. Some manufacturers expect to see a convertible SUV in the US market by 200x.
Table 1 Production of convertible roof systems 2002 and 2006 (units)

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2006</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>456,500</td>
<td>550,000</td>
<td>20%</td>
</tr>
<tr>
<td>Japan</td>
<td>83,000</td>
<td>99,000</td>
<td>19%</td>
</tr>
<tr>
<td>North America</td>
<td>290,500</td>
<td>451,000</td>
<td>55%</td>
</tr>
<tr>
<td>Total</td>
<td>xxx,000</td>
<td>x,xxx,000</td>
<td>xx%</td>
</tr>
</tbody>
</table>

Sources: just-auto.com and industry estimates.

CTS leads the European market for convertible roof system production, followed by the French company Heuliez and Eduscha.

Figure 2 European OE market shares for convertible roof systems, 2002 (% of production volume)

In North America, Collins & Aikman is the largest supplier of convertible roof systems, head and shoulders above its nearest competitor, ASC.
**Figure 3 North American OE market shares for convertible roof systems, 2002**

(% of production volume)

<table>
<thead>
<tr>
<th>Company</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collins &amp; Aikman</td>
<td>SAMPLE</td>
</tr>
<tr>
<td>ASC</td>
<td>COPY</td>
</tr>
<tr>
<td>Karmann</td>
<td>5%</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>

Sources: just-auto.com and industry estimates.
Figure 4 BMW Z3
ASC supplies convertible top systems as well as removable hardtops for the BMW Z3.

Table 2 sets out our estimates and forecast for OE sunroof fitment to all new passenger cars in Western Europe, Japan and the United States through 200x. Until quite recently, sunroofs were only fitted on luxury vehicles, but have now permeated across all car segments.

Table 2 Production of sunroofs for light vehicle applications 2000-2005¹ ²

<table>
<thead>
<tr>
<th>(million units)</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
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<tr>
<td>Western Europe</td>
<td>2.0</td>
<td>2.1</td>
<td>2.1</td>
<td>2.2</td>
<td>2.2</td>
<td>2.3</td>
</tr>
<tr>
<td>Japan</td>
<td>1.8</td>
<td>1.9</td>
<td>2.0</td>
<td>2.1</td>
<td>2.2</td>
<td>2.3</td>
</tr>
<tr>
<td>United States</td>
<td>1.9</td>
<td>2.0</td>
<td>2.3</td>
<td>2.6</td>
<td>2.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Other regions</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
<td>0.6</td>
<td>0.6</td>
<td>0.6</td>
</tr>
<tr>
<td>Worldwide</td>
<td>6.2</td>
<td>6.5</td>
<td>6.9</td>
<td>7.5</td>
<td>7.8</td>
<td>8.2</td>
</tr>
</tbody>
</table>

¹ Includes all types of sunroof although majority are tilt and slide type.
² Even though the European sunroof market continues to shrink, bear in mind that some of the European production is exported to the US.

Source: BMW

Sources: just-auto.com and industry estimates.
According to Mark Pauzé, marketing manager for Michigan-based ASC Inc, sunroofs and air conditioners are not mutually exclusive. He said: “Unlike European drivers, Americans don’t see a problem in having both air conditioning and a sunroof.” In the US, sunroof installation rates grew from xx.x% of car sales in 19xx to xx.x% in 199x. A growth segment within the US sunroof market is for pick-up and SUV applications. “Americans expect the same kind of amenities in their SUVs and minivans as they have in their passenger cars,” said Mark Pauzé, “that is where a lot of the growth is coming from.” But as the US market matures, suppliers will be looking at offering unique designs to act as a selling point to spur the market. Are sunroofs still an option in North America? “It depends on the carmakers’ strategies”, continued Mark Pauzé. “For some manufacturers, it is standard fitment with upper level vehicles. In the US, a fairly big chunk of the light vehicle market is leased. So having a car with a sunroof tends to raise residual values of the vehicle.”

Market shares
The German group Webasto has a xx% share of the global sunroof market with most growth coming from the US and Japan.

Japan market shares
In Japan, xxx has a xx% share of the OE sunroof market, second only to xxx (who supply xxx). Other leading suppliers are xxx (who supply xxx), and xxx (who supply xxx).

xxx recently tied up with two European suppliers, Inalfa Industries and Edscha AG, to establish a global network of manufacturing bases to meet OEM global sourcing needs.

The automotive component manufacturer has teamed up with Inalfa Industries to take advantage of exchange rate movements between the two countries and has set up shop in Japan.

Ohi Seisakusho formed an alliance for the development, production and supply of sunroofs with Inalfa in November 2000, and will use the US manufacturing base of Inalfa for local manufacture. The alliance with Inalfa, which has production bases in the Netherlands, the US, Brazil, Italy, Korea and Japan, will give the company a global production base.
Production and mutual supply will initially be focused in North America and Japan and later on globally. In April 200x, the company entered into a partnership with xxx, which has operations in Germany, France, the UK, Spain, Portugal, Czech Republic, Slovakia, the US, Canada, Mexico, Brazil and China for production and mutual supply of xxx and xxx in xxx and xxx.

On the aftermarket side of the business, xxx claims to have an xx% share of the xx aftermarket, followed by xx with xx%. In xx, xx also claims to have an xx% market share, followed by xxx with xx%. In xxx, xxx claims a xxx% share of the xxx sunroof aftermarket. They estimate that these markets are growing at around 300% per year. In xx, the sunroof aftermarket is worth around xx,000 units per year. Sunroof volumes in Korea are about xx,000 units annually.

In Australia, xxx claims to have xxx% of the sunroof aftermarket, distributing a range of products through its own subsidiary. In addition, the company sells a number of sunroofs to HSV (Holden Special Vehicles).

**European market shares**

In the European market, Webasto leads the OE market for sunroofs, followed by ArvinMeritor and the Dutch company Inalfa which itself absorbed the sunroof activity of Britax in 199x.
Figure 5 European OE market shares for sunroofs, 2002
(\% of production volume)

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
</tr>
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<tbody>
<tr>
<td>Webasto</td>
<td>60%</td>
</tr>
<tr>
<td>ArvinMeritor</td>
<td>26%</td>
</tr>
<tr>
<td>Inalfa</td>
<td>14%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
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</tbody>
</table>

Sources: just-auto.com and industry estimates.

On the aftermarket side, xxx claims to have xxx\% of the market, thanks to its wide range of sunroofs from pop-ups to panorama units.

Table 3 shows who supplies sunroofs to whom. Clearly, it is in the vehicle makers’ interest to have more than one sunroof supplier, balancing their interests while trying to get more added-value from each supplier. Suppliers do not see that position changing in the near future.
### Table 3 Europe: Suppliers of sunroofs to European vehicle makers, 2002

<table>
<thead>
<tr>
<th></th>
<th>Audi</th>
<th>BMW</th>
<th>Daimler Chrysler</th>
<th>Fiat</th>
<th>Ford</th>
<th>GM/Opel/Vauxhall</th>
<th>Jaguar</th>
<th>MCC Smart</th>
<th>Porsche</th>
<th>PSA Peugeot-Citroën</th>
<th>Renault</th>
<th>MG Rover</th>
<th>Seat</th>
<th>Skoda</th>
<th>Volkswagen</th>
<th>Volvo</th>
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<td>ArvinMeritor</td>
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<td>Baumeister &amp; Ostler</td>
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<td>Inalfa</td>
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<tr>
<td>Webasto</td>
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</table>

Source: Auto Business

### United States market shares

In the US, Webasto is the number one supplier of OE sunroofs, followed by xxx, xxx and xxx. Collectively, these four companies have about xxx% of the US OE market. xxx supplies sunroofs to xx. In the aftermarket, xxx also leads thanks to its recent merger with xxx. The combined operation has more than xxx installers in the US and Canada. xx claims to have a xx% share of the US sunroof aftermarket.

In October 20xx, xxx began to merge its aftermarket operations with Inalfa, creating the second largest aftermarket sunroof supplier worldwide. The deal brings together ASC's very strong aftermarket brand name and distribution set-up with Inalfa's sunroof products, global development resources and technical skills. Together, they can offer a wider range of sunroofs and accessories, including Inalfa's seat heaters and other accessories, plus ASC's mobile video systems, spoiler-sunroofs and factory-fitted sunroofs.
Inalfa Skylite, an Inalfa Industries company, is a major worldwide aftermarket sunroof manufacturer. The company also supplies seat heaters in North America. Inalfa Industries operates xx manufacturing facilities worldwide, focusing on design and manufacture of original equipment sunroofs, open air systems and stamped assemblies for the automotive and heavy-truck industries. The company has sales of $xxx million and employs xxxx people worldwide.

In May 200xxx, the family of founder Heinz Prechter agreed to sell the sunroof and specialty car maker ASC Inc (formerly American Sunroof Co) to xxx. xxx is a private equity fund headed by turnaround expert Jay Alix. The sale affects about x,x00 workers at xx facilities in the US, Canada, Germany and South Korea. The news comes as competition intensifies in the sunroof sector as

Aisin Seiki Co has decided to set up a new plant in Illinois, USA in order to boost its autoparts manufacturing capabilities, as it expects the demand from Toyota Motor Corp and Honda Motor Co to increase. The new plant, Aisin Manufacturing Illinois has a capital investment of ¥600 million and is wholly owned by Aisin USA Manufacturing, a US production subsidiary of Aisin Seiki. The 15,000-m² plant has been set up creating 125 jobs. The company expects to hire a further 125 people at this plant by 2005. The ¥2.3 billion plant began making sunroofs and door parts at the new plant in July 2002, and has an annual sales target of $xxx million for 200xx.
Figure 6 North American OE market shares for sunroofs, 2000 and 2002
(% of total production volume)

Sources: just-auto.com and industry estimates.
South America market shares
In South America, xxx enjoys a 100% share of the aftermarket in Chile (where annual demand is about x,x00 units), Venezuela (x,x00 units), Argentina (x,x00 units) and Mexico x,x00 units).