Die Krise der Automobilwirtschaft mit Blick auf

die Mobilitätsentwicklung

Institut für Marketing und Betriebspsychologie

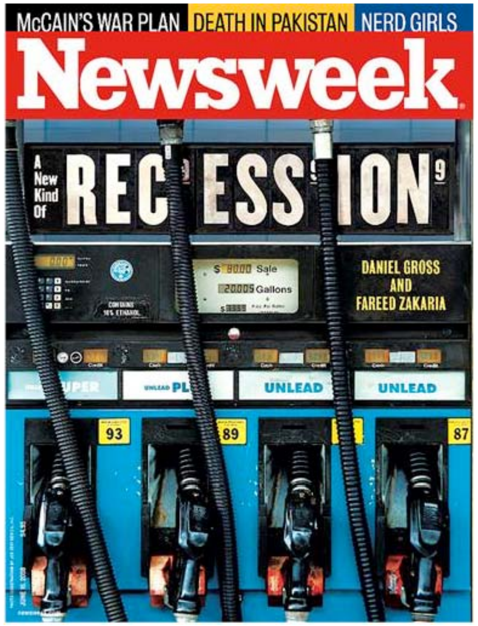
IMB - Gruppe

Biel,
18. Sep. 2009


Was Sie lesen...
Was in der
Industrie
vorgeht...

Einige Zahlen zum Einstieg

- 1 Mio. neue Fahrzeuge pro Woche
- 40% der weltweiten Ölförderung für Autos
- 25% der Haushaltsbudgets für Fahrzeuge
- 45 Verkehrstote in 20 Minuten
- 10% des Bruttosozialprodukts durch Autoindustrie



NZZ Online

Sorgen um Auto-Paket drücken US-Börsen ins Minus 11. Dezember 2008

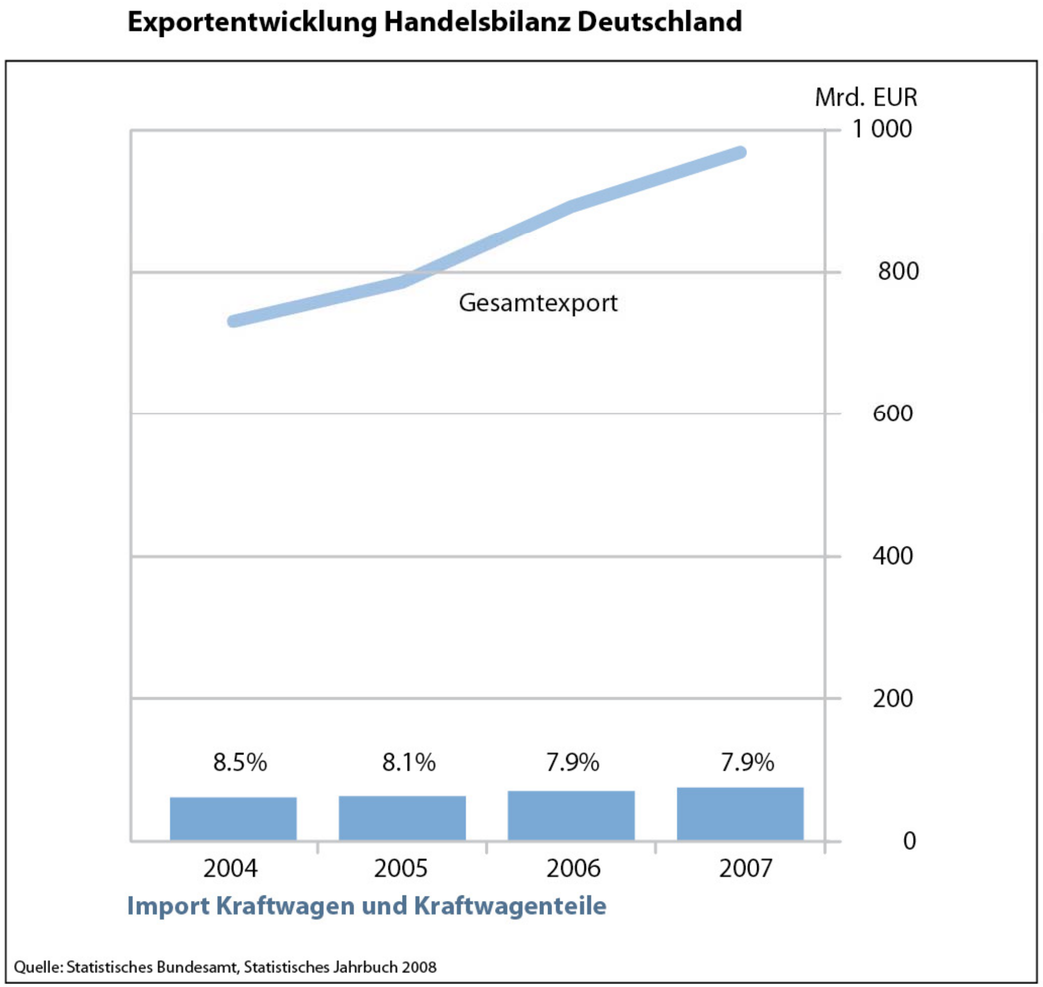
Bloomberg.com

GM, Chrysler Failure Would Push Economy Into Abyss 15. Dezember 2008

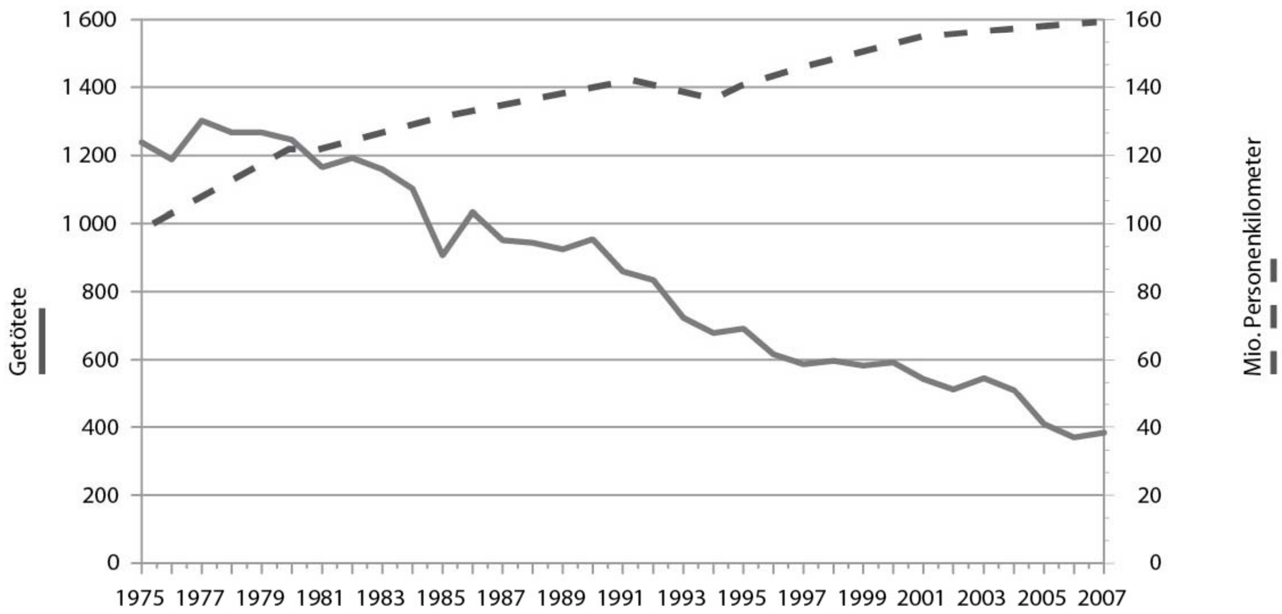
Frankfurter Allgemeine
FAZ.NET

Neue Prognose für 2009: Autobranche erwartet schlechtestes Jahr seit Wiedervereinigung
3. Dezember 2008

Bedeutung für die Handelsbilanz



Rückgang der Verkehrsopfer



«Grün und sexy»

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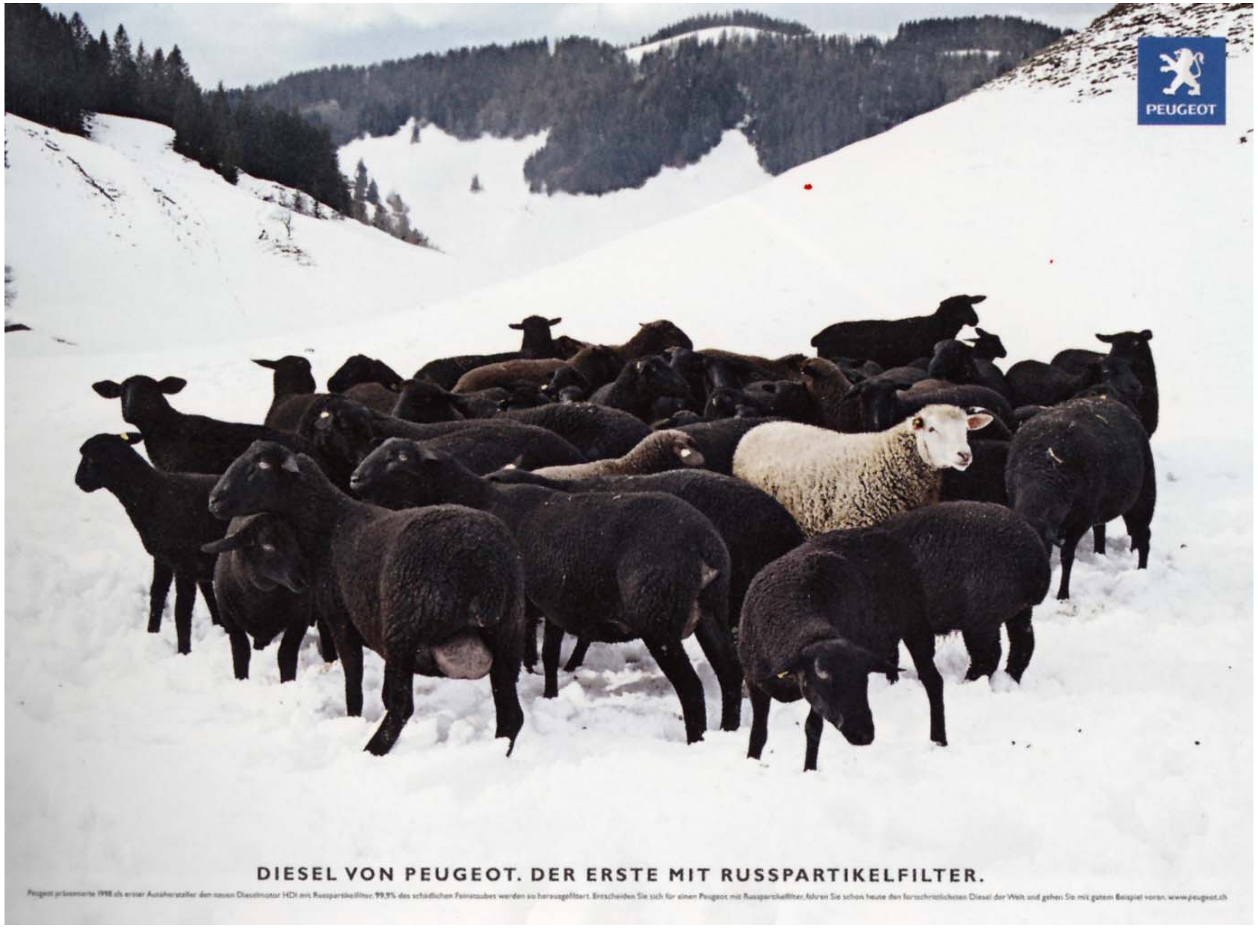
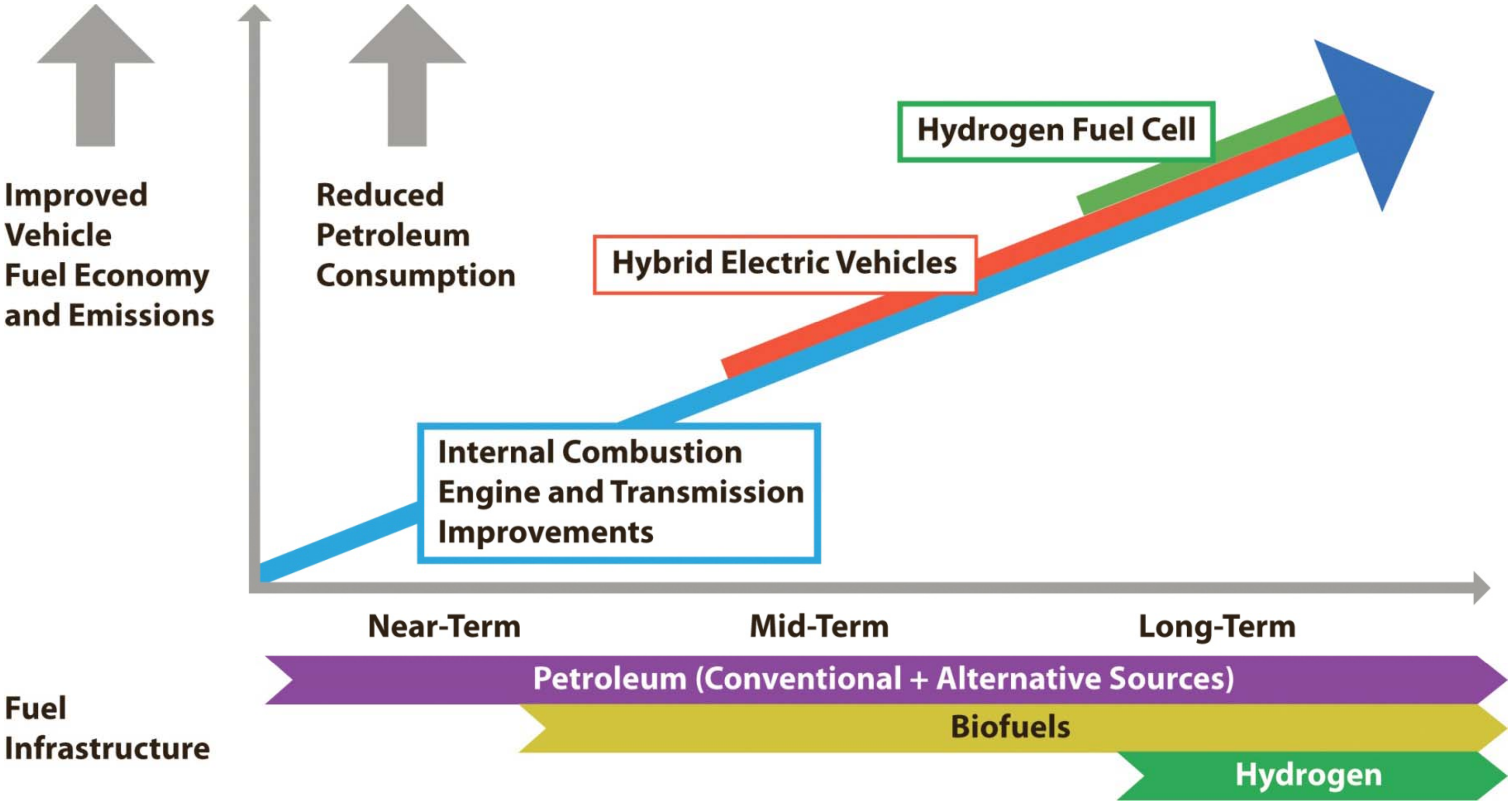
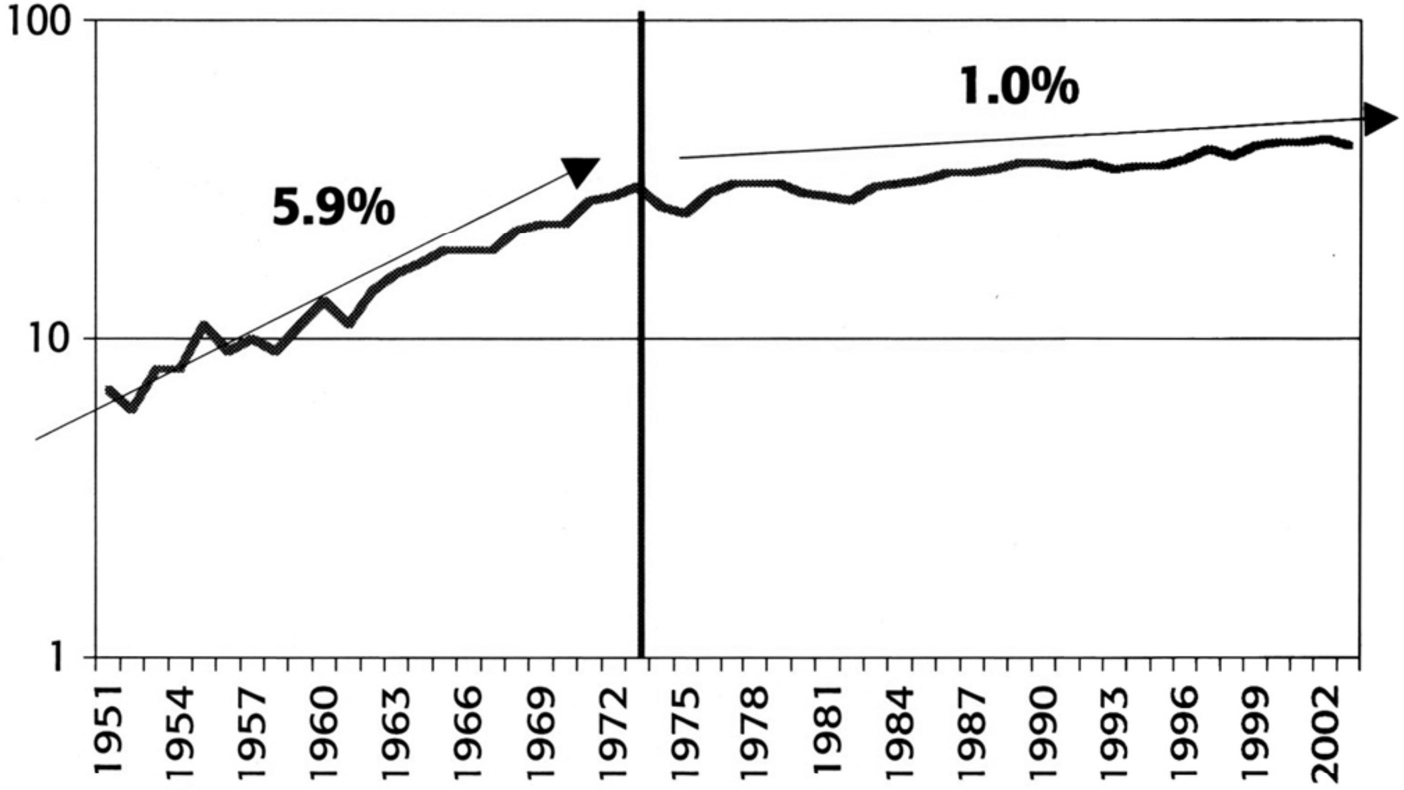


«Grün und sexy»

Wohin die Reise geht

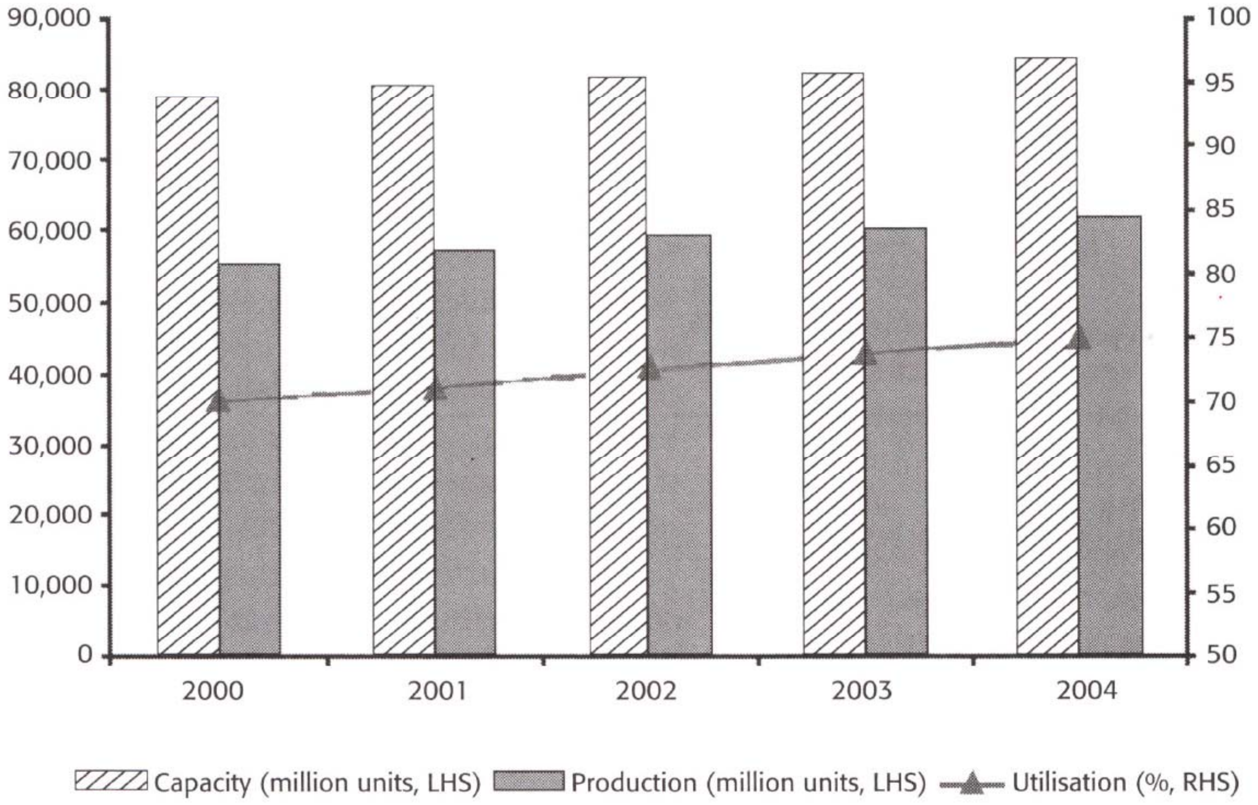


Verlangsamtes Wachstum



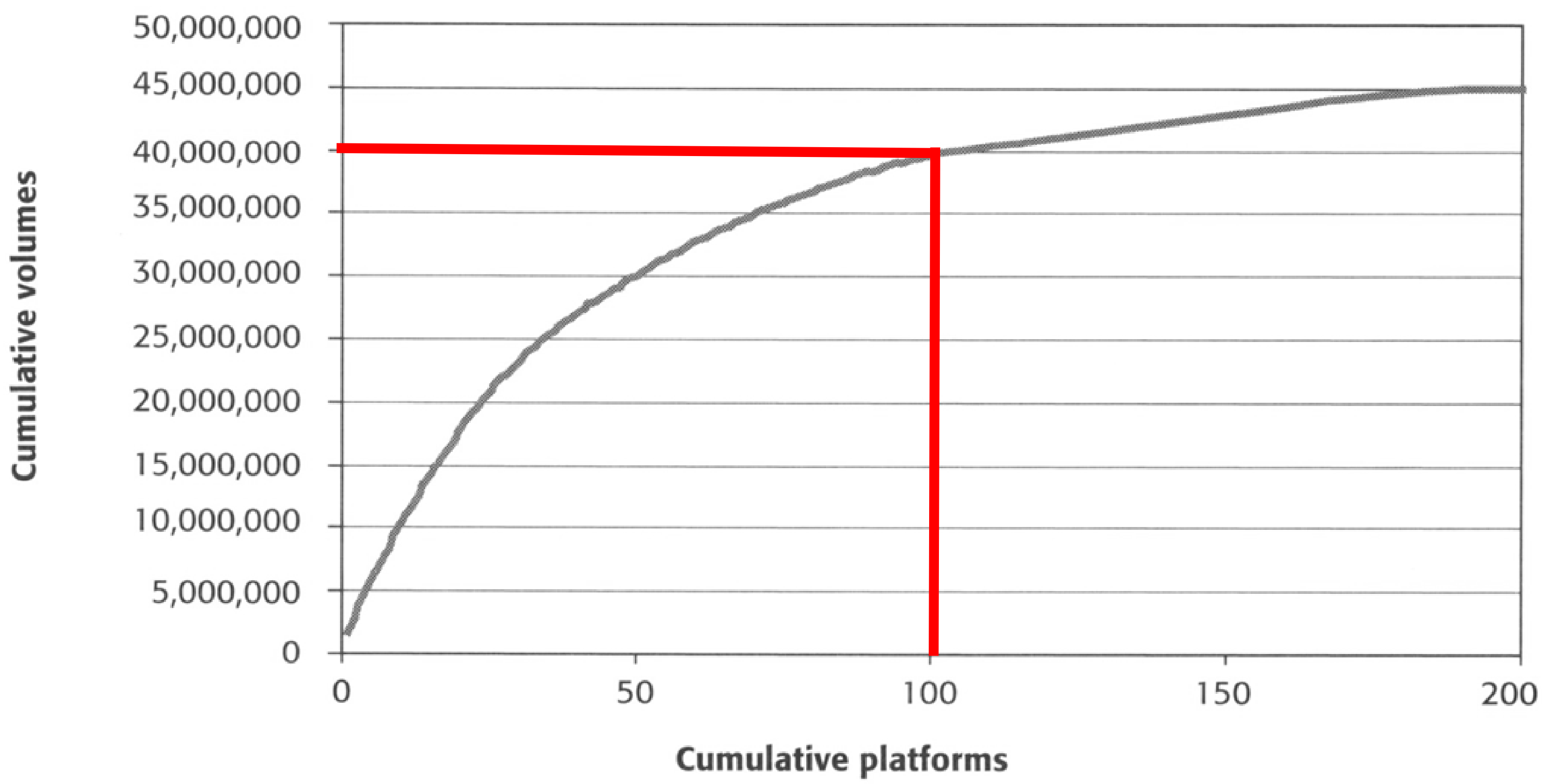
*Source: auto*POLIS, Economic Intelligence Unit

Globale Überkapazität



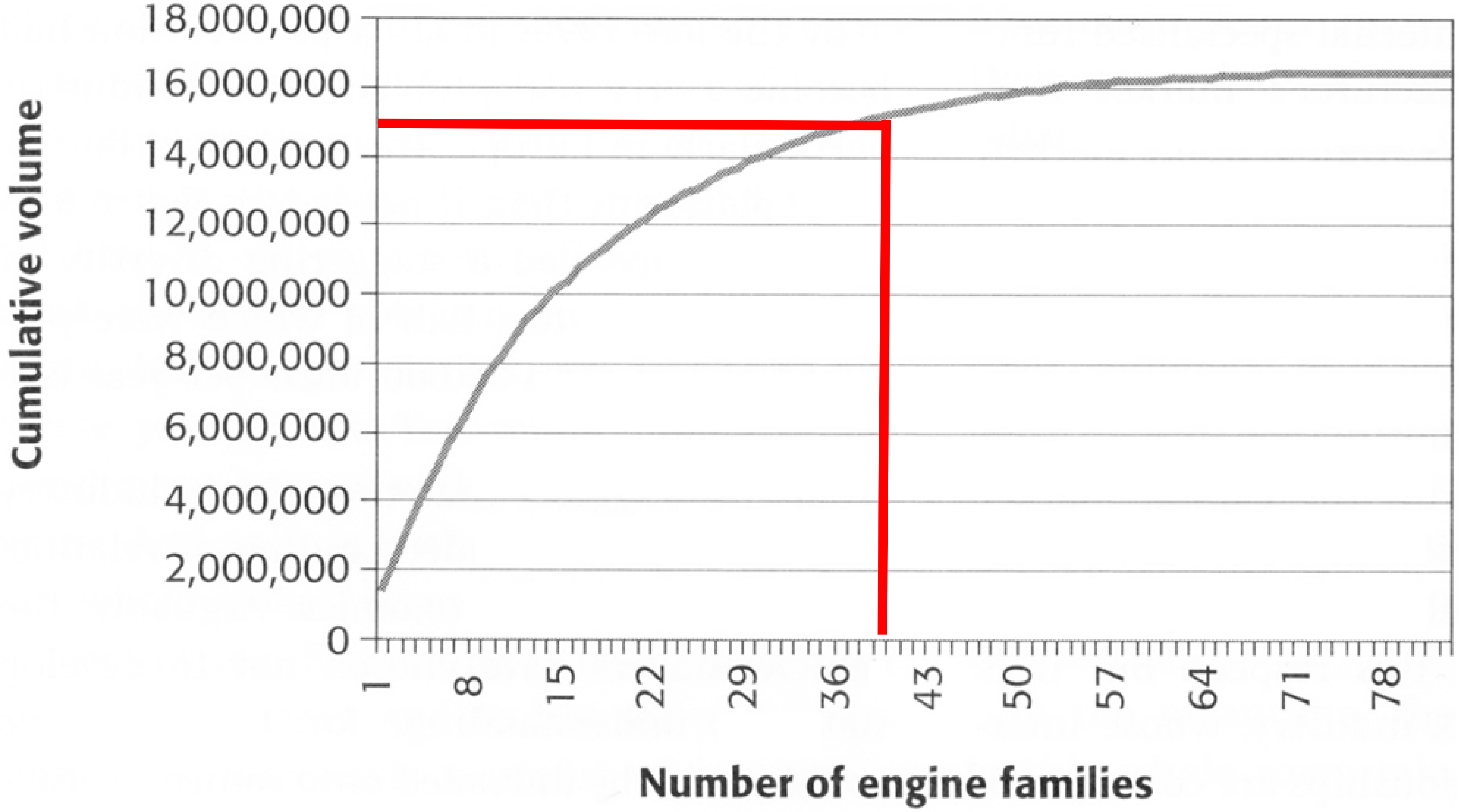
Source: Deutsche Bank, *The Drivers*
Note: This chart is based on a different forecast from other projections on vehicle production provided in this book from a different source, assuming steady but slow growth. If the other, less positive, projections prove more accurate, then the capacity utilisation rate will be lower than indicated here.

Expansion an Plattformen



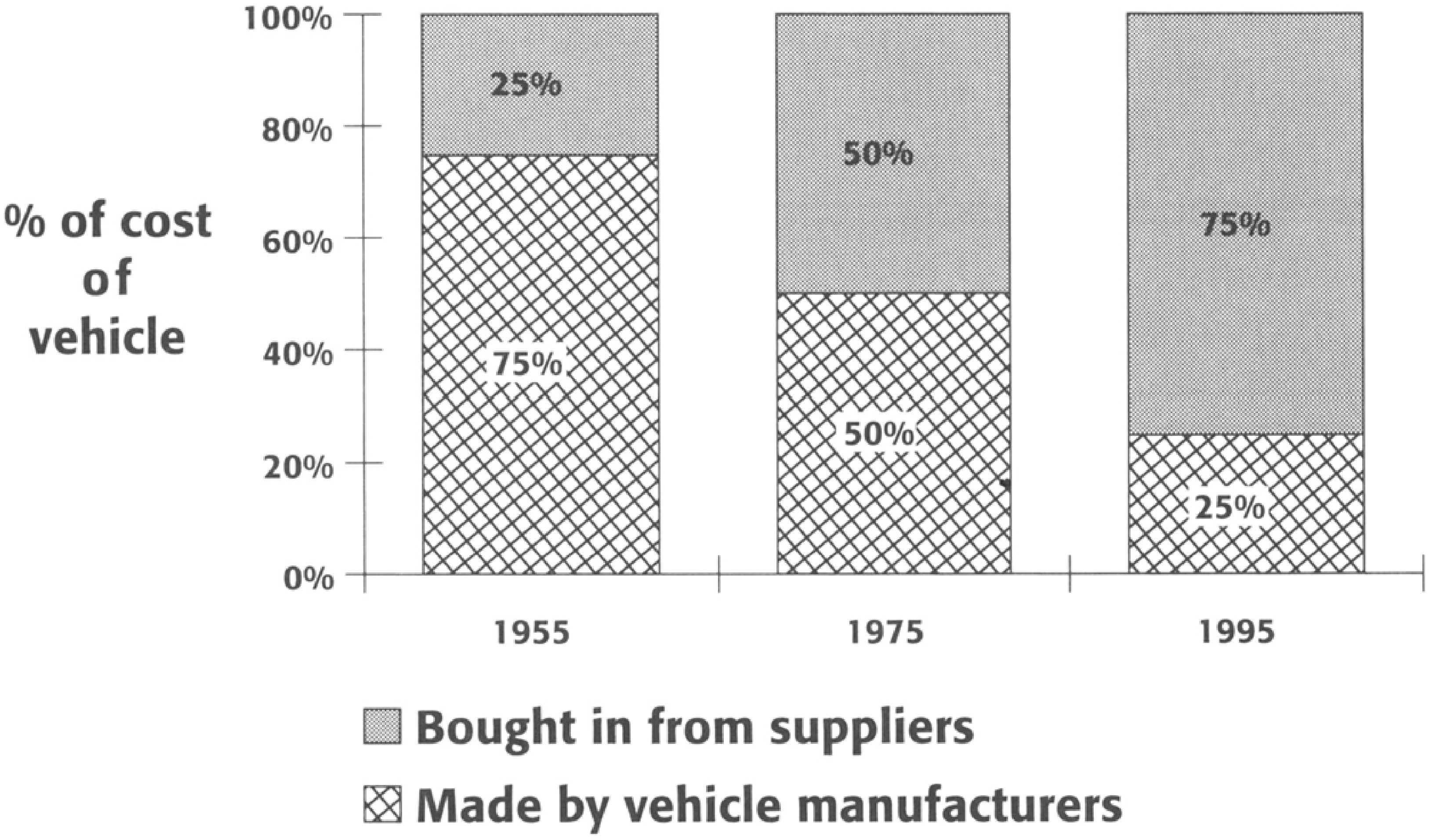
*Source: auto*POLIS

Expansion an Motorenfamilien



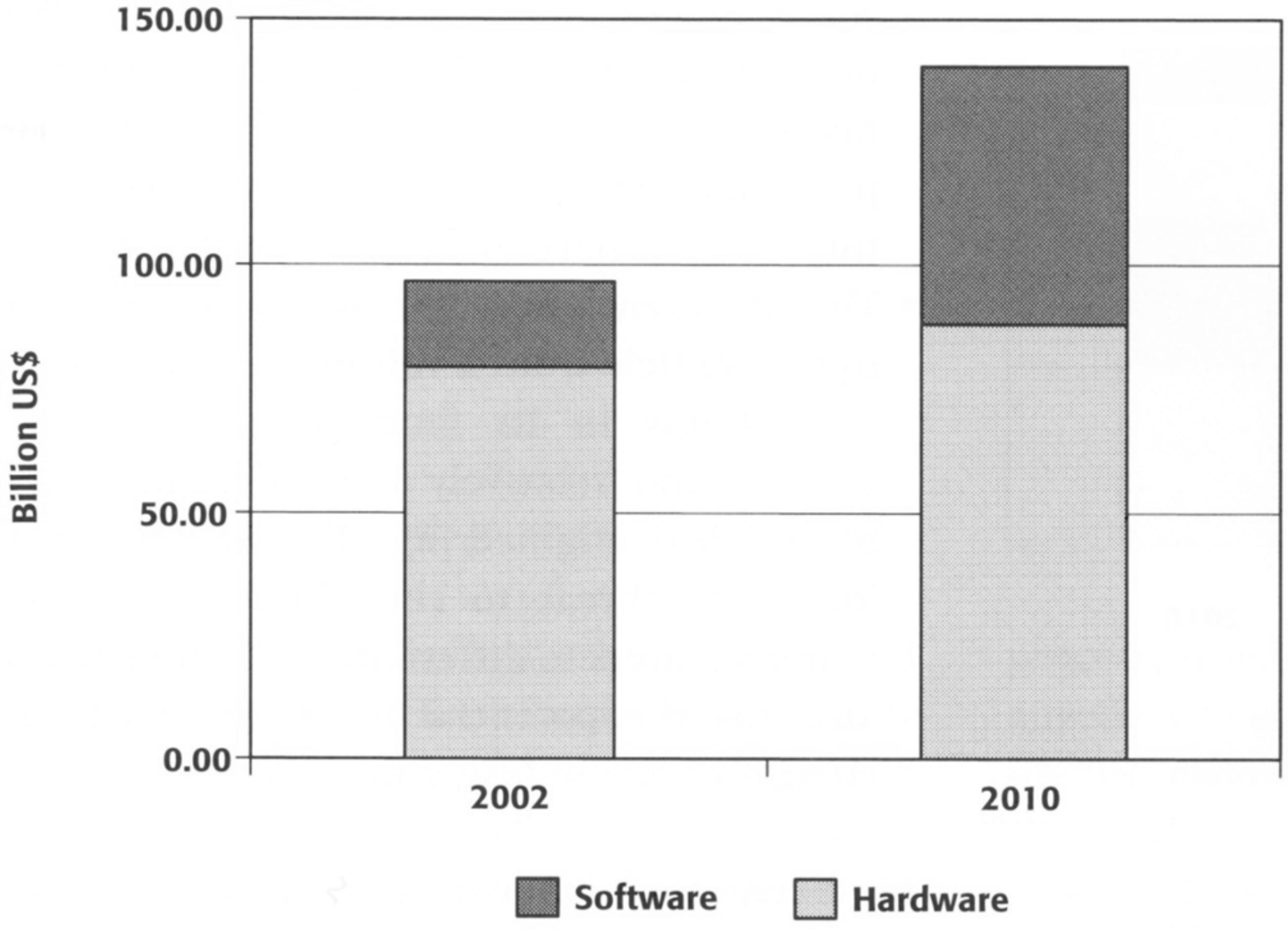
*Source: auto*POLIS

Die Autowelt auf den Kopf gestellt



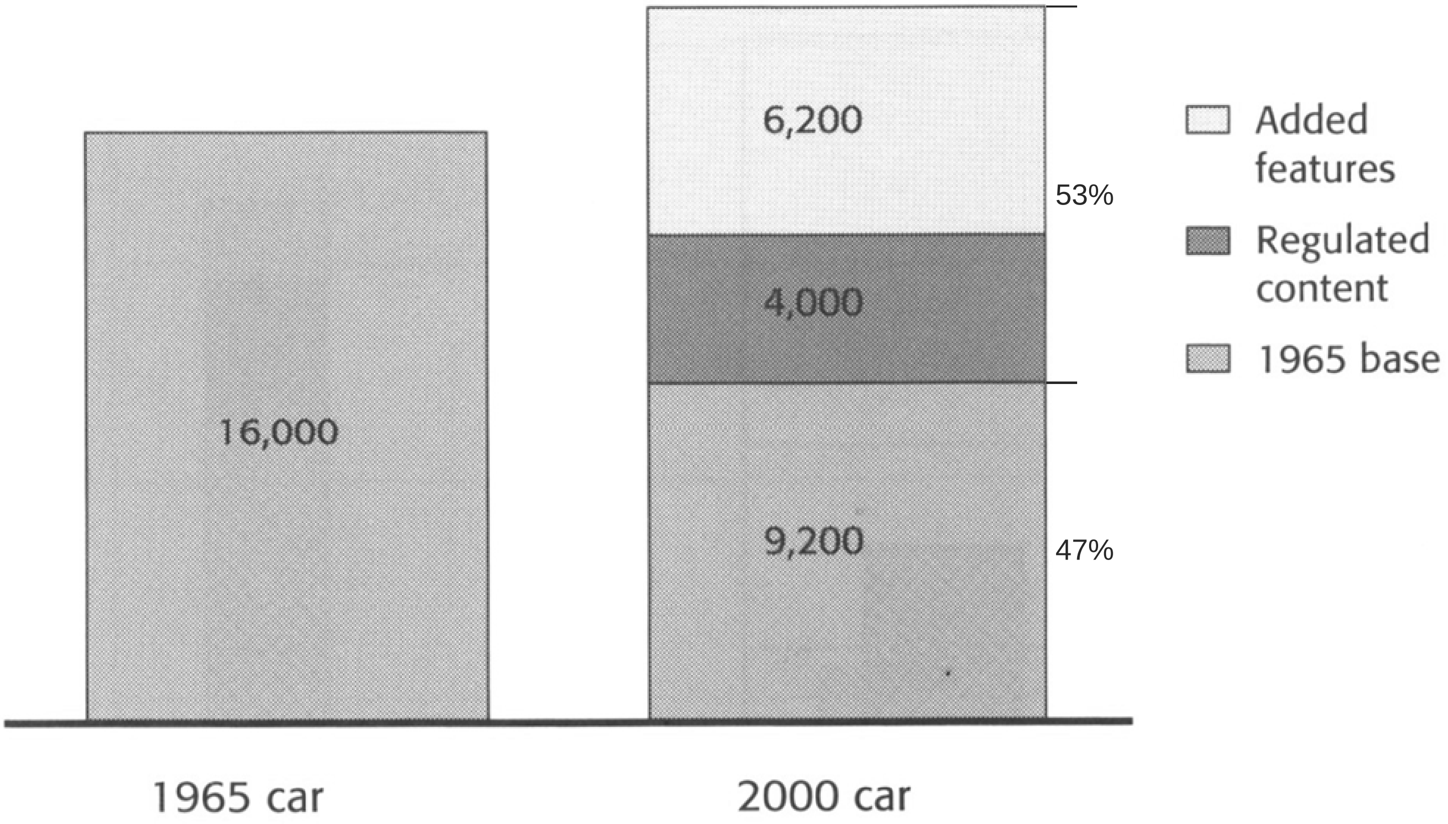
Source: autoPOLIS

Die Software-Revolution auf vier Rädern



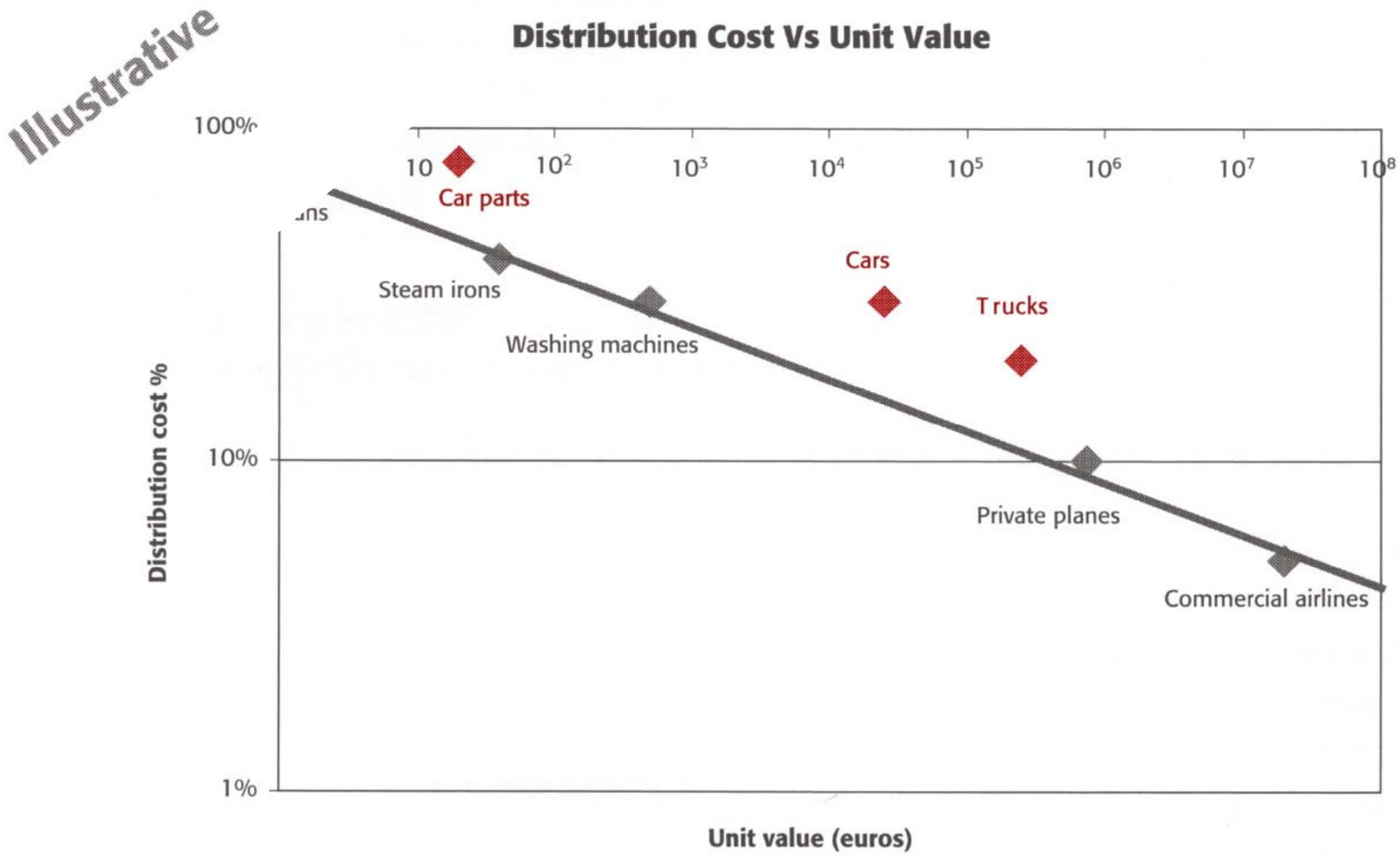
Source: Strategy Analytics, quoted in 'Components: 1000 Units per Vehicle', *Vehicle News* 271 (October 2003), p. 61.

Der Preiseinfluss der Zusatzausstattungen



Source: Glenn Mercer, 'The Global Automotive OEM and Automotive Supplier Industry', McKinsey & Company, 26 September 2002
Note: Values are in year 2000 constant dollars, for an average-sized US car

Effizienzvergleich mit anderen Distributions-Sektoren



Source: *auto*POLIS

Gruppenfreistellungsverordnung

Was hat die neue GVO gebracht?

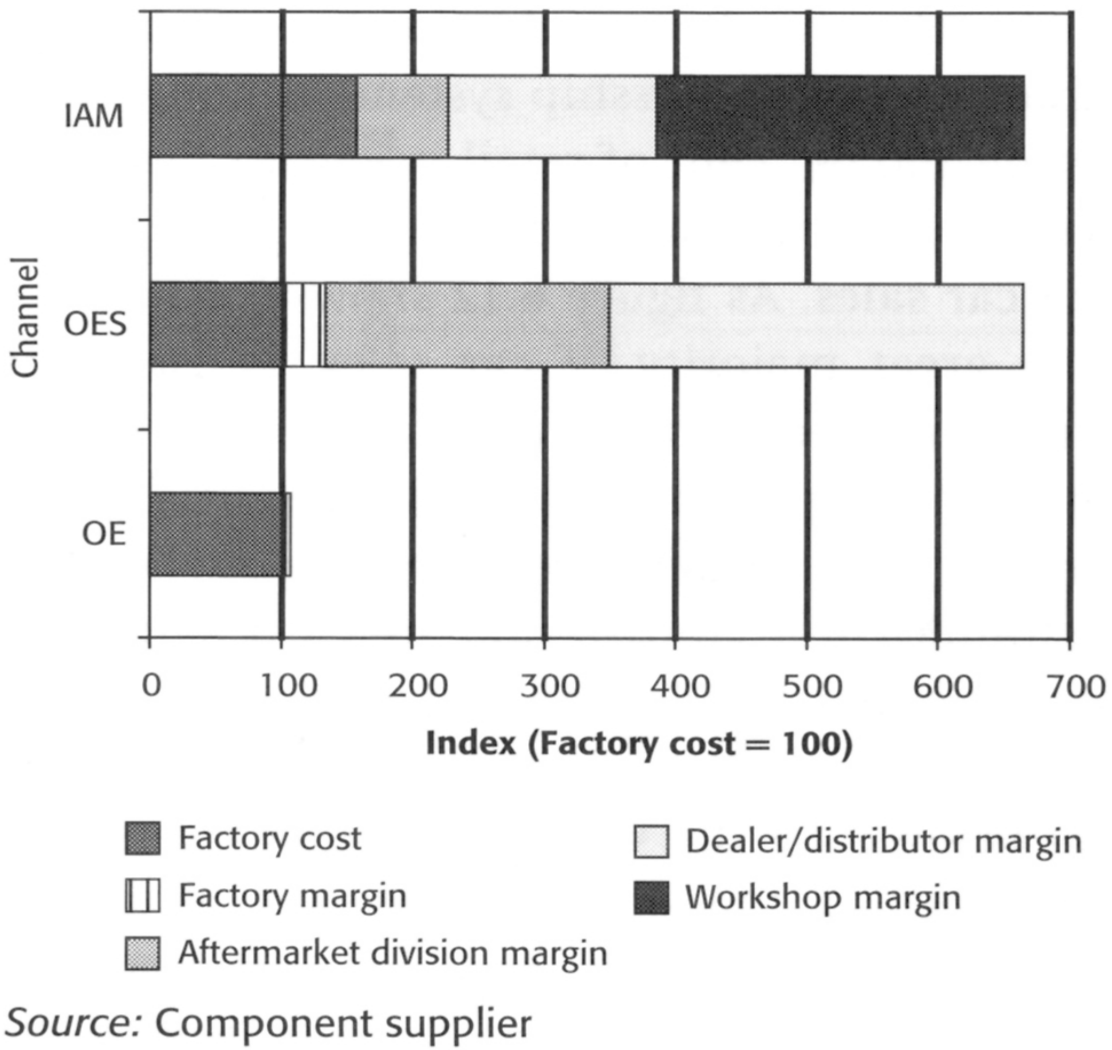
	Europe, old	Europe, new	US
Reselling	Banned	Allowed in exclusive distribution	Allowed
VM direct sales	Allowed	Allowed	Banned
Multi-branding	Strongly restricted	Allowed	Allowed
Dealer protection	Weak	Strengthened	Strong
Sales–service link	Imposed	Not imposed	Not imposed

*Source: auto*POLIS, adapted from Leonardo Volpato, presentation to Fleet News Conference, Barcelona, 12 March 2002

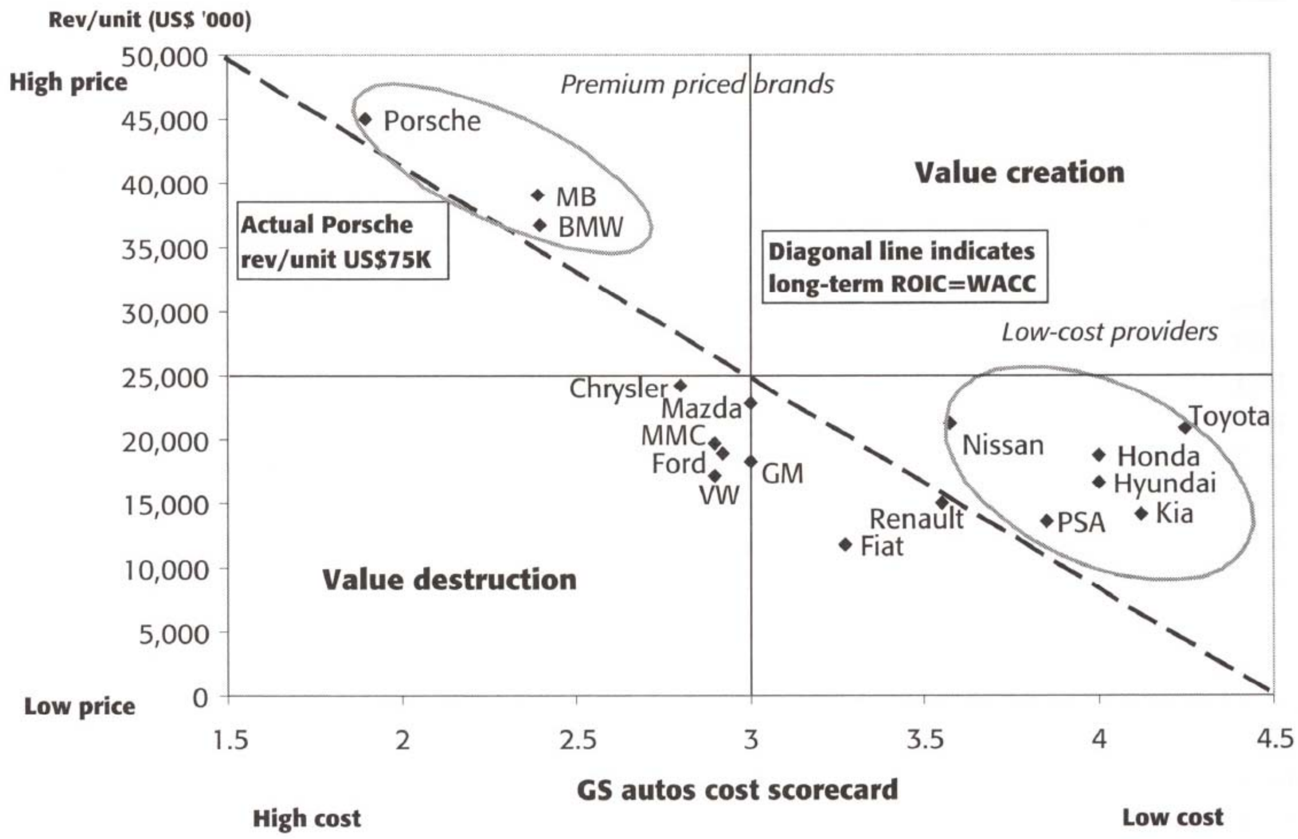
FIGAS Branchenspiegel/Berichtsjahr 2007

	Branchenspiegel CH
Cash-Flow	2.50%
Betriebsgewinn	2.00%
BG NW Detail m. Bonus	9.30%
BG NW an Agenten	3.40%
BG Occasionen	6.50%
BG Teile	25.00%
SAF-Factor	66.90% aus TrendFocus Q3/07
Mietaufwand in % von Umsatz	2.20% 1.6% bei Umsatz > 15 Mio.

Ersatzteilmargen-Struktur

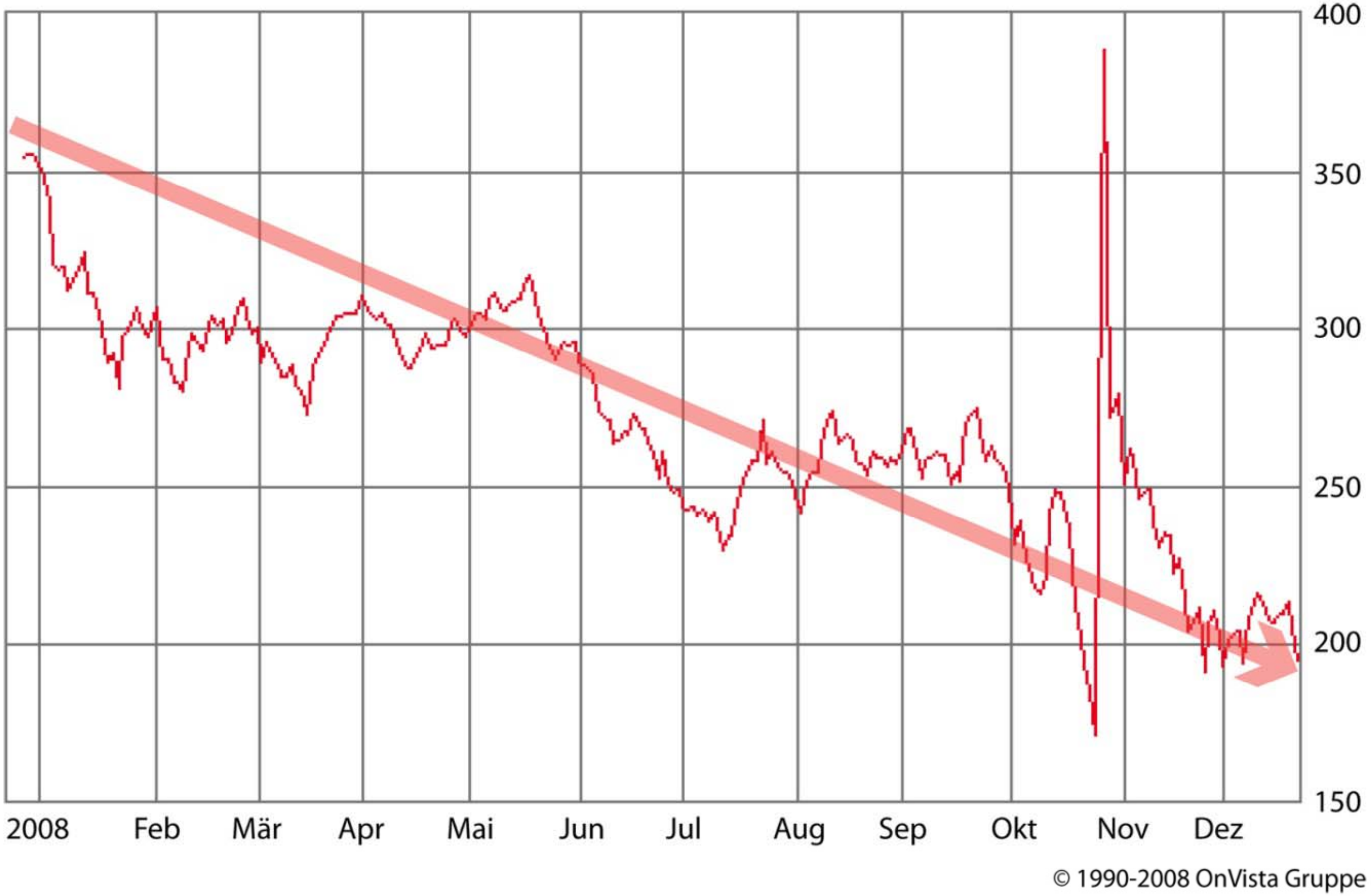


Wer Wertschöpfung generiert

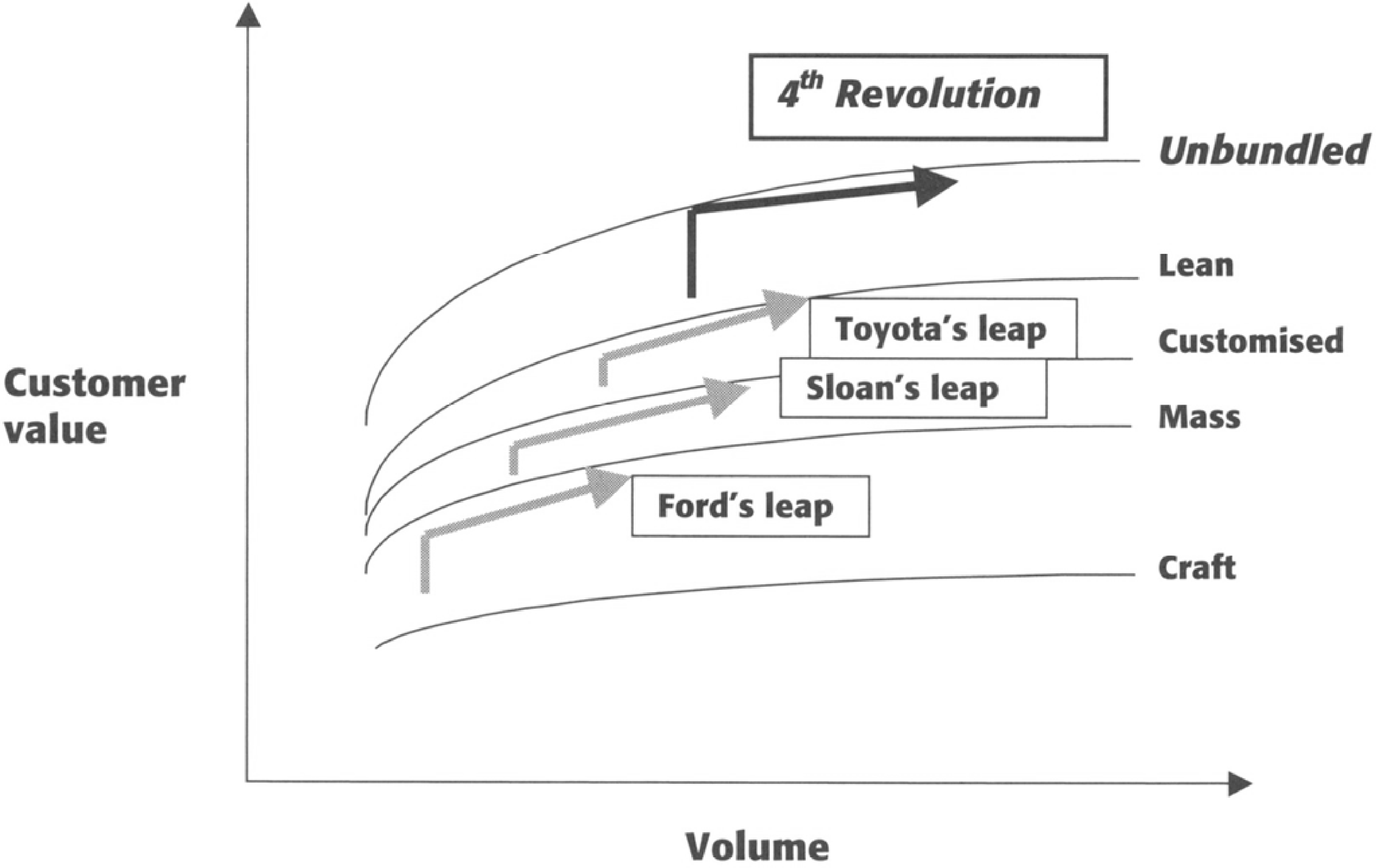


Source: Goldman Sachs Japan

DOW JONES EURO STOXX
Automobiles & Parts Index (Kurs) (EUR)



Die vierte Automobil-Revolution



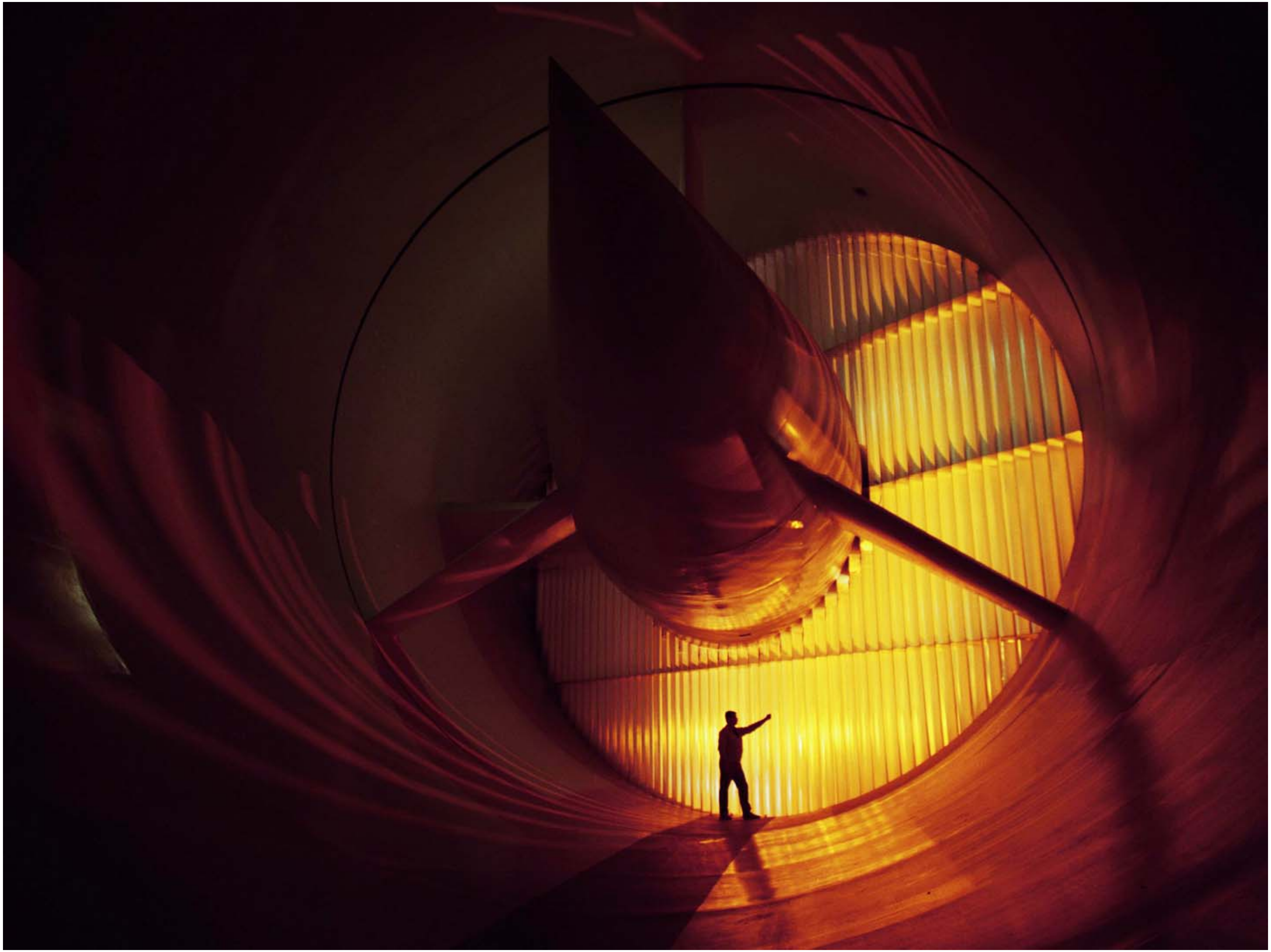
Source: autoPOLIS

Preiseinsparungen bei europäischem Durchschnittsfahrzeug

	Proliferated (euro/vehicle)	Deproliferation factor	Deproliferated (euro/vehicle)	Gain (euro/vehicle)	Industry gain (billion euros)
Average selling price	**19,000**	**90%**	**17,100**	**1,900**	**29**
Dealer gross margin	1,500				
Incentives	1,200				
Price of retail distribution	2,700	75%	2,025	675	10
VM's net price	**16,300**	**92%**	**15,075**		
Transportation	350	100%	350	-	
Warranty costs	350	60%	210	140	2
VM's marketing and sales overhead	1,900	50%	950	950	14
Cost of wholesale distribution	**2,600**	**58%**	**1,510**	**1,090**	**16**
Cost of distribution	**5,300**	**75%**	**3,975**	**1,325**	**20**
Price of bought-in materials	**8,150**	**95%**	**7,743**	**408**	**6**
VM's manufacturing labour	2,200	90%	1,980	220	3
Manufacturing overhead	500	110%	550	50	1
Depreciation	800	75%	600	200	3
VM's internal manufacturing cost	**3,500**	**89%**	**3,130**	**370**	**6**
Product development	**950**	**70%**	**665**	**285**	**4**
General and administrative overhead	**450**	**50%**	**225**	**225**	**3**
Total VM's costs	**15,650**	**85%**	**13,273**	**2,378**	**36**
VM's EBIT	*650%*	*277%*	*1,803*	*1,153*	**17**

*Source: auto*POLIS, adapted from Deutsche Bank *The Drivers,* table 6, p. 23.


Clean Energy for All!

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Vielen Dank...
Fuer Ihre
Aufmerksamkeit...