

Die Krise der Automobilwirtschaft mit Blick auf die Mobilitätsentwicklung

**Institut für
Marketing und
Betriebspsychologie**

IMB - Gruppe

Biel,
18. Sep. 2009

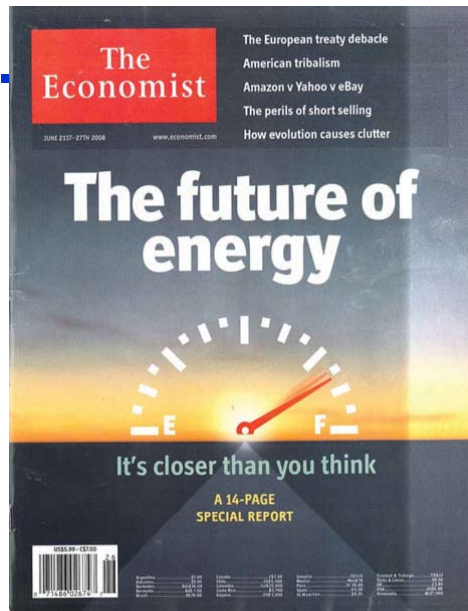
The background image is a photograph of an iceberg in a dark blue ocean under a clear sky. The visible tip of the iceberg is small and jagged, while the submerged part is much larger and more complex in shape, illustrating the concept of hidden information.

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

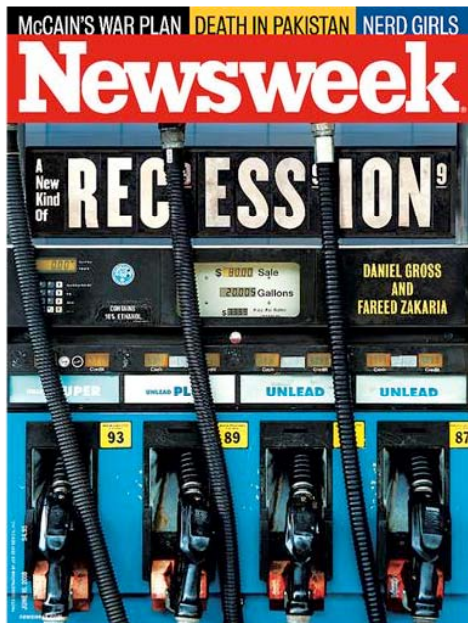


NZZ Online

**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

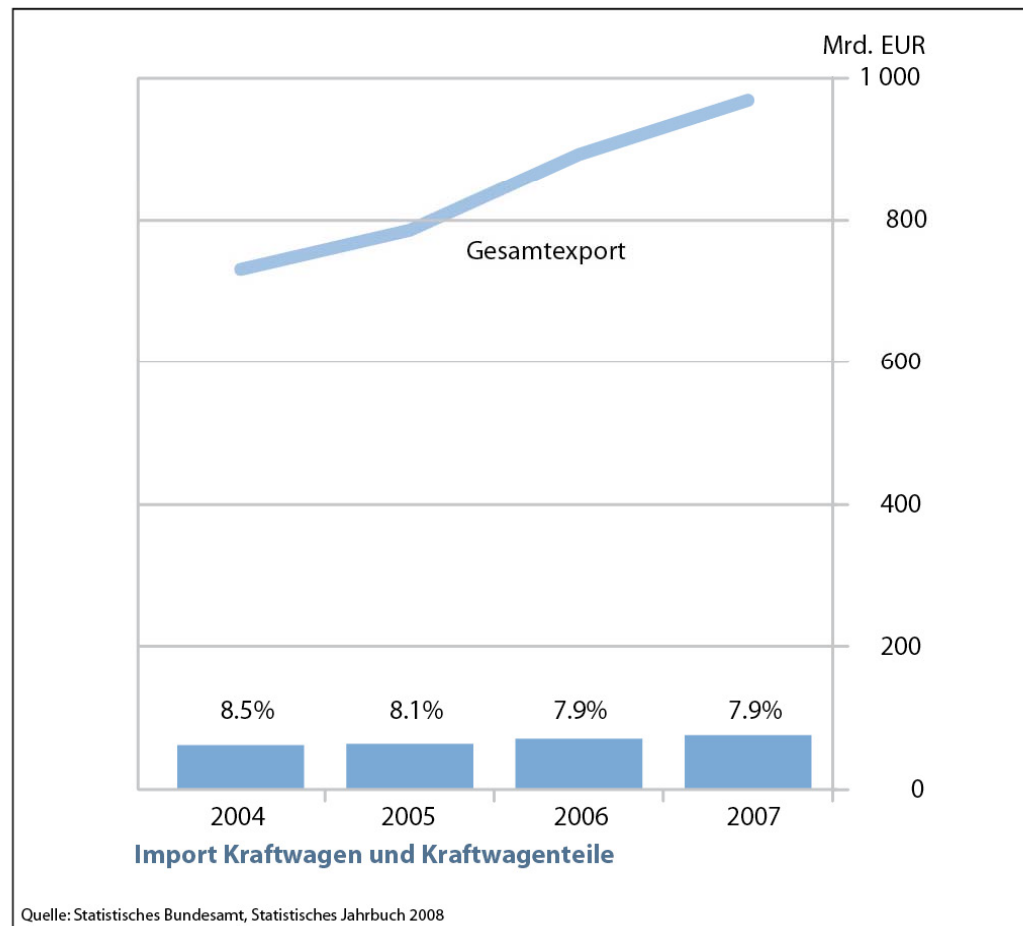


Frankfurter Allgemeine FAZ.NET

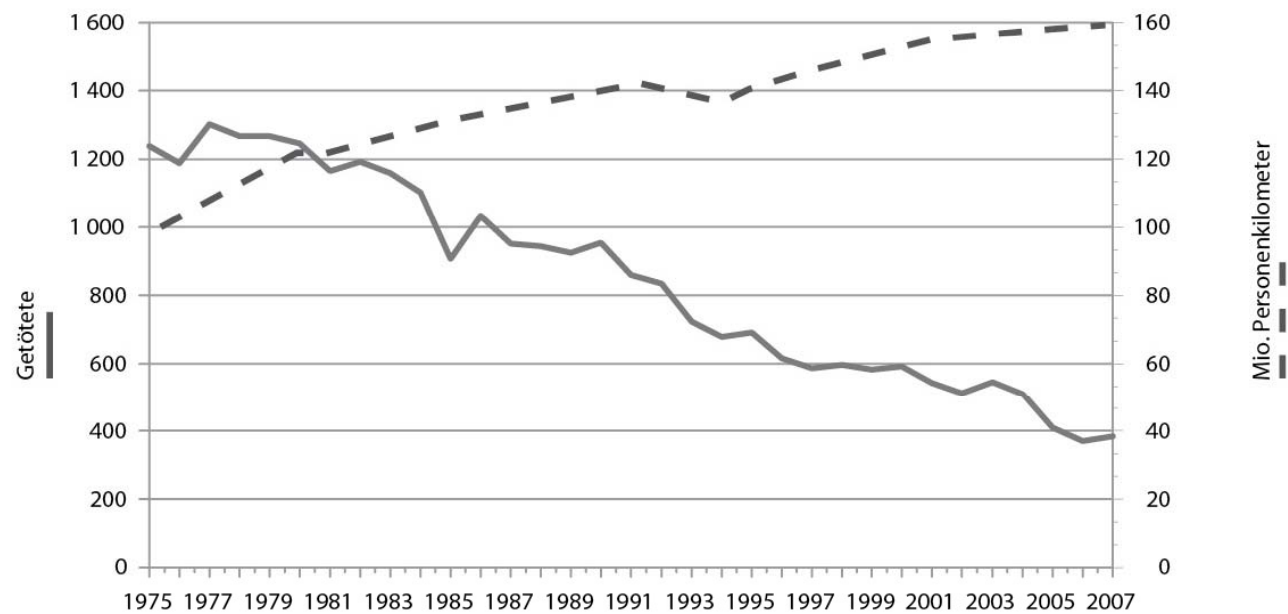
**Neue Prognose für 2009: Autobranche erwartet
schlechtestes Jahr seit Wiedervereinigung**
3. Dezember 2008

Bedeutung für die Handelsbilanz

Exportentwicklung Handelsbilanz Deutschland



Rückgang der Verkehrsopfer



© BFS

«Grün und sexy»

SaabBioPower

REINES GEWISSEN
MEHR KRAFT

KEINE KOMPROMISSE
DIE FAHRZEUGE

BIOPOWER CONCEPT CARS
BIOETHANOL E85-TANKSTELLEN

BEST IN EUROPA
EMPA STUDIE

PRESSE
FAQ

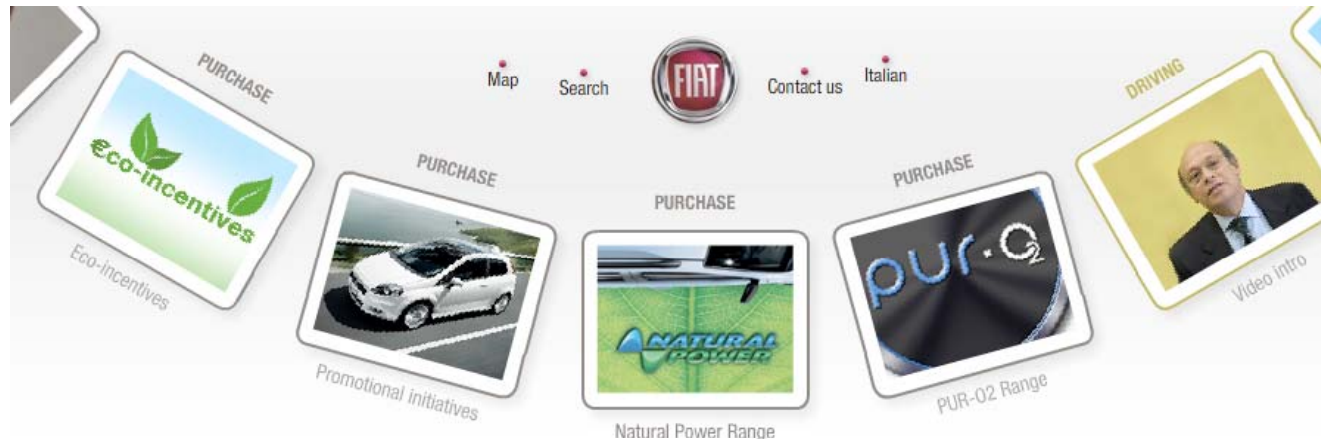
SCHWEIZER BIOETHANOL

Die Differenz heisst Zukunft.

► Lesen Sie mehr über Saab BioPower.



«Grün und sexy»



Natural Power Range



We believe that natural gas power is the most appropriate technological choice at present, and is immediately available to address pollution problems in city areas.

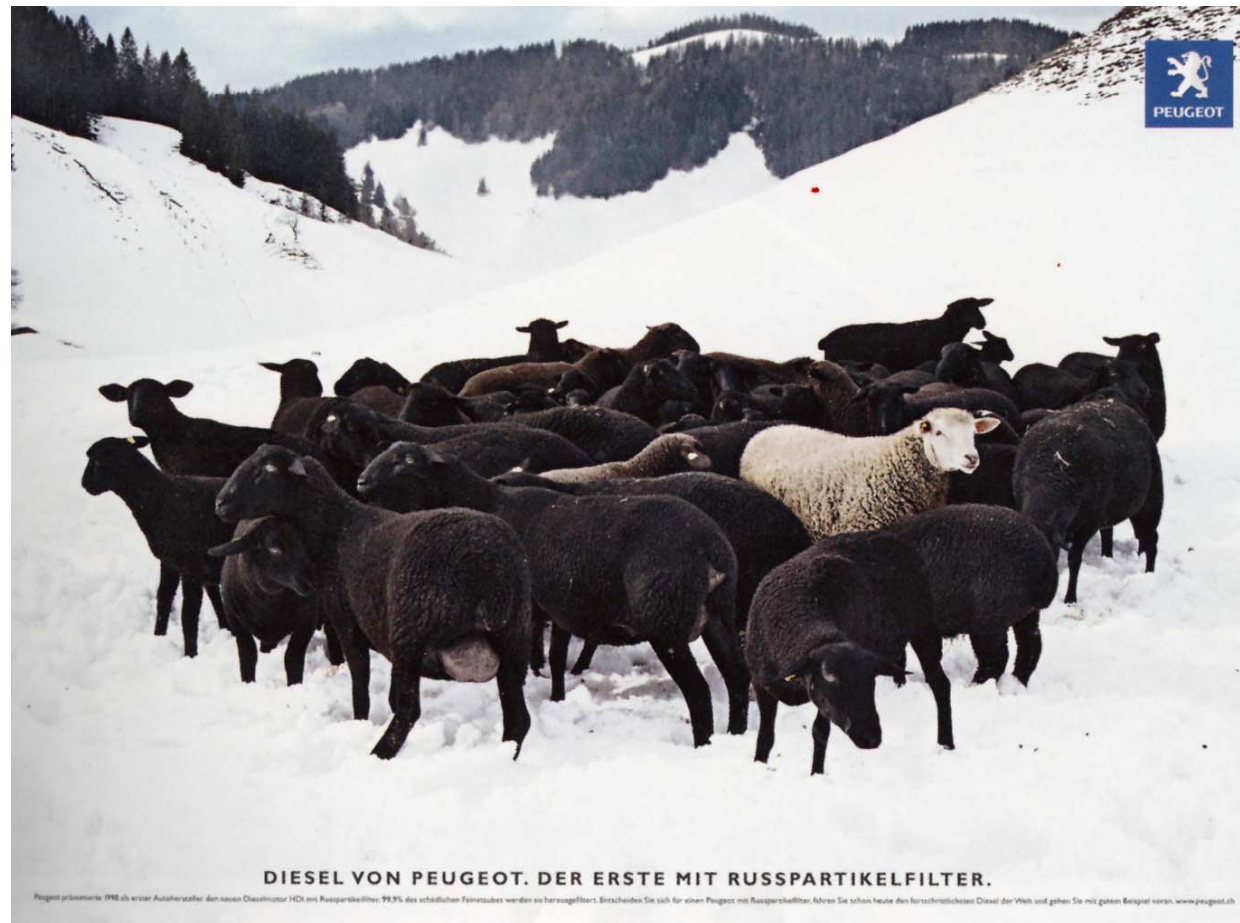
Natural gas is:

- **economical**: it is the cheapest fuel and it makes you eligible for governmental contributions
- **practical**: you can always move freely and can rely on an extensive network of gas stations
- **ecological**: reduces CO2 emissions by ca 23%

This is why in the field of alternative fuels we are strongly committed to the development and upgrade of our range of **dual fuel feed vehicles running on**



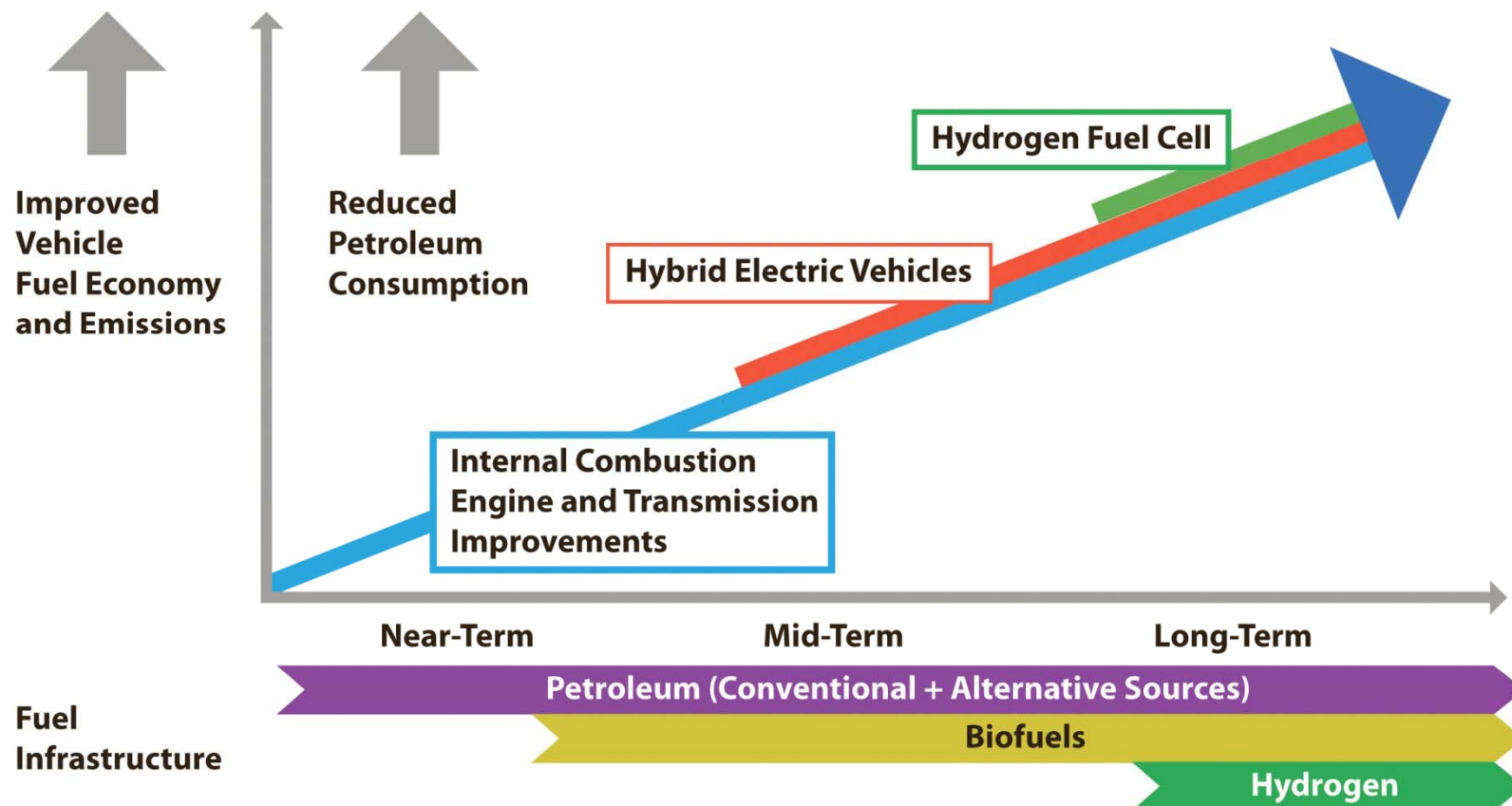
«Grün und sexy»



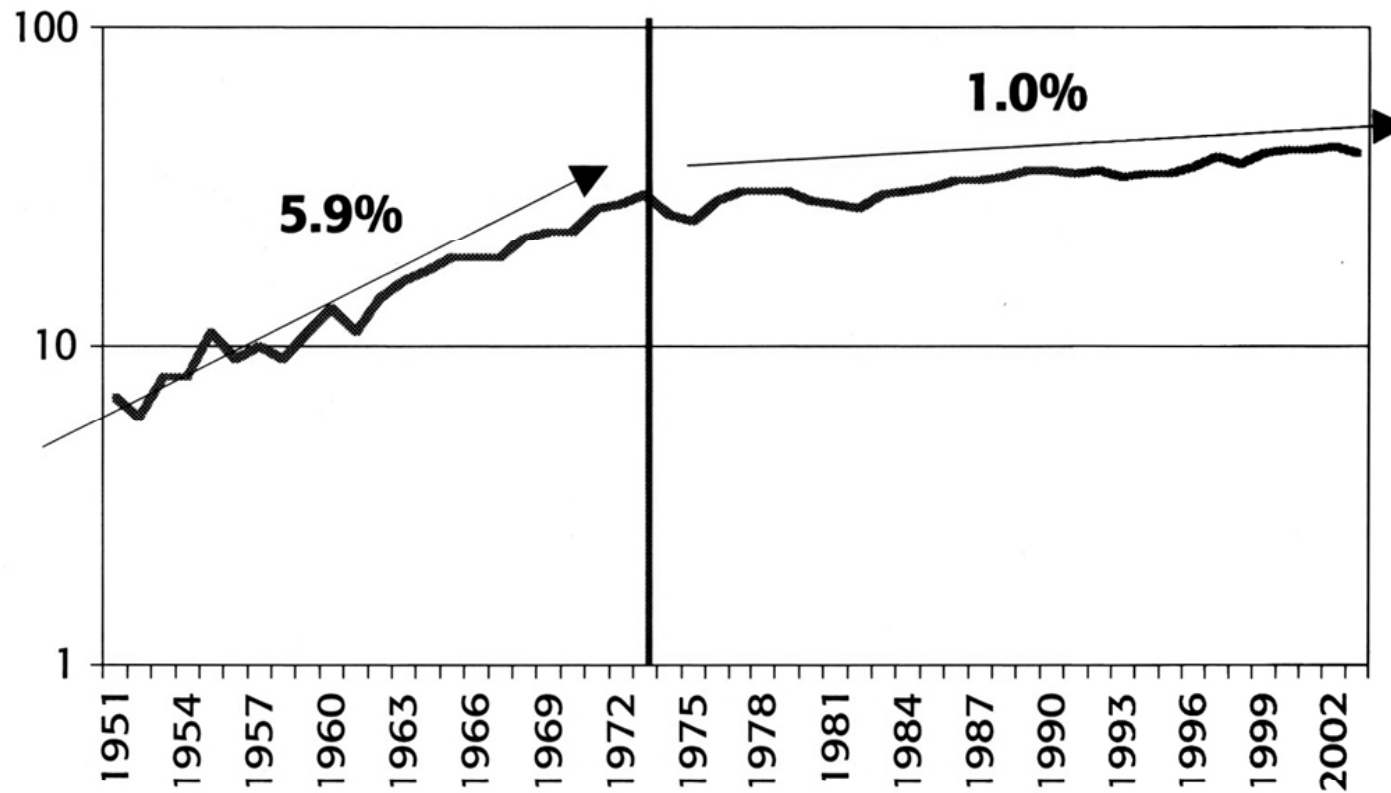
«Grün und sexy»



Wohin die Reise geht

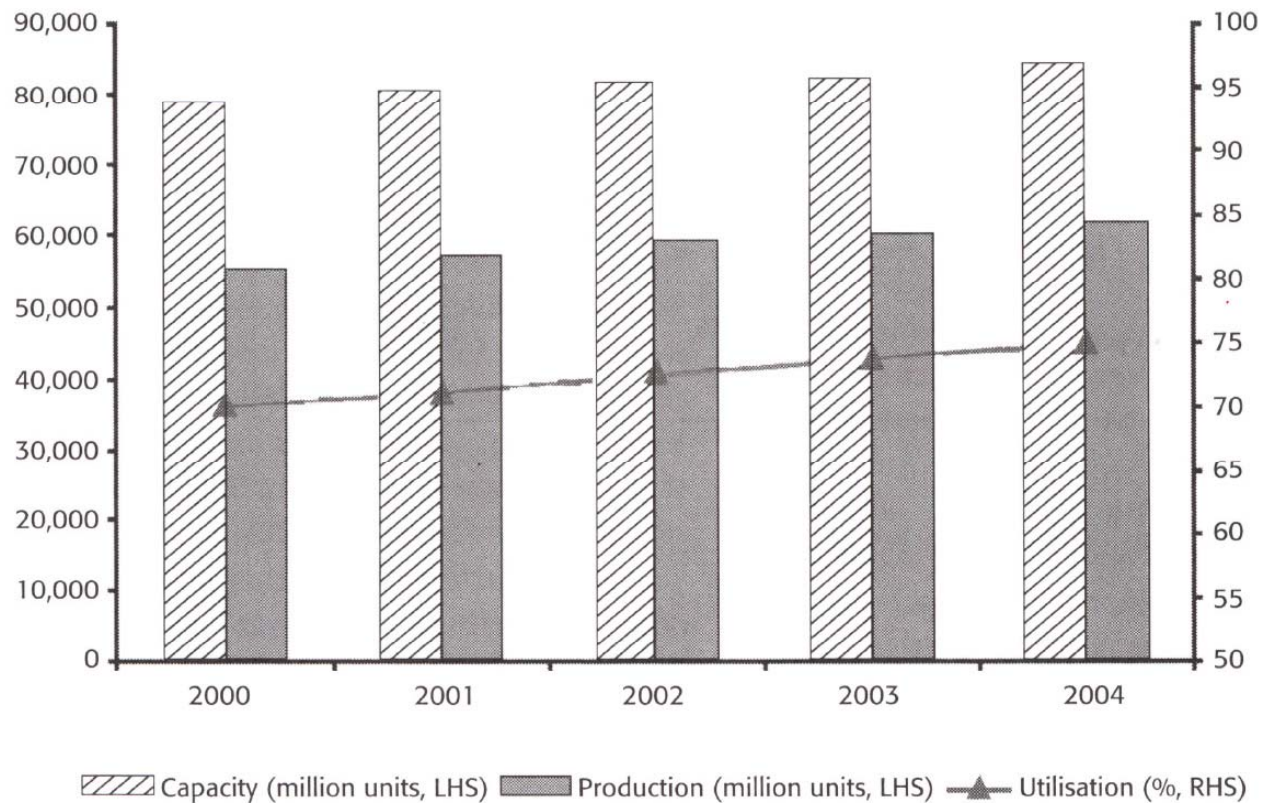


Verlangsamtes Wachstum



Source: *autoPOLIS*, Economic Intelligence Unit

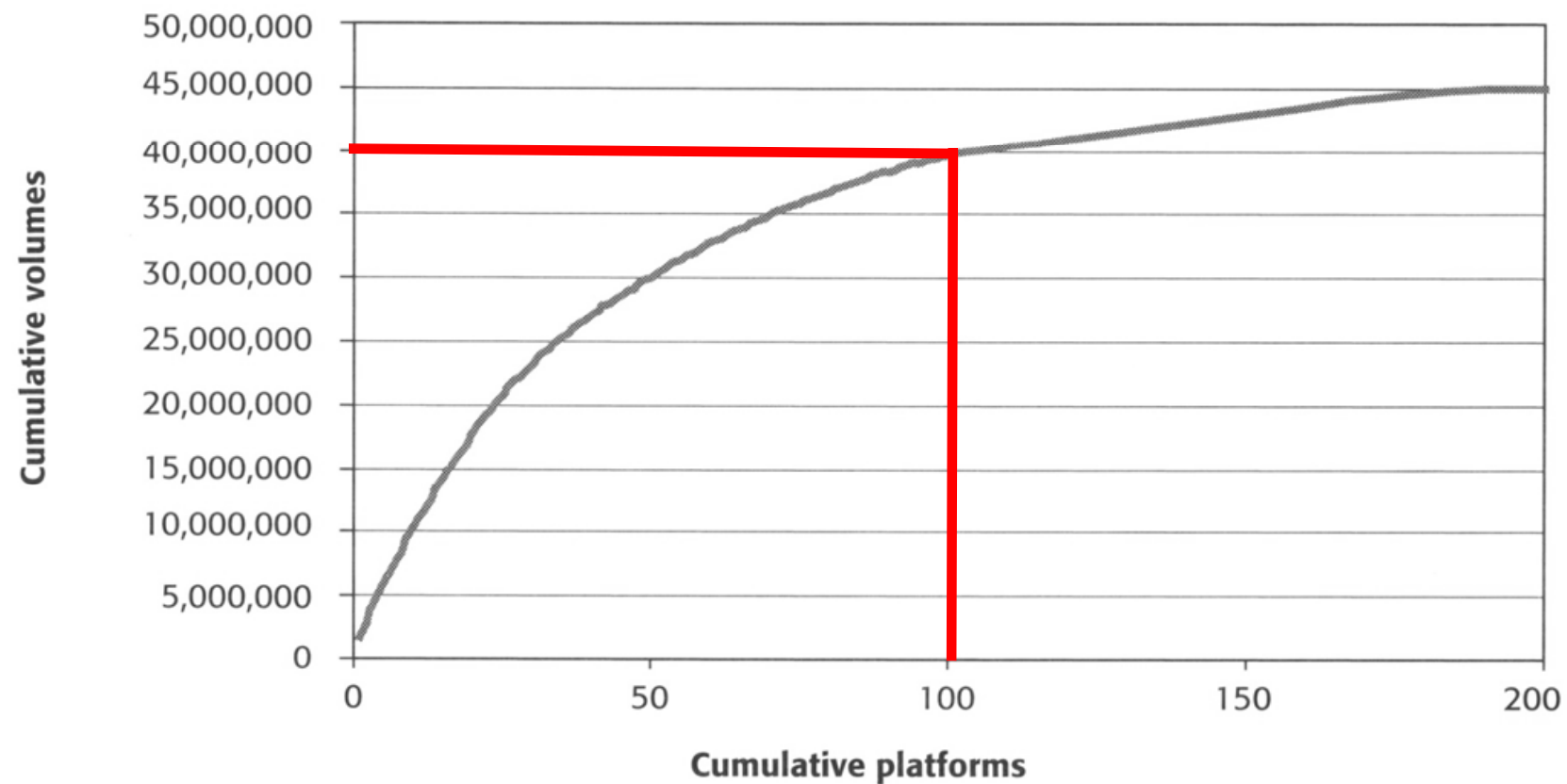
Globale Überkapazität



Source: Deutsche Bank, *The Drivers*

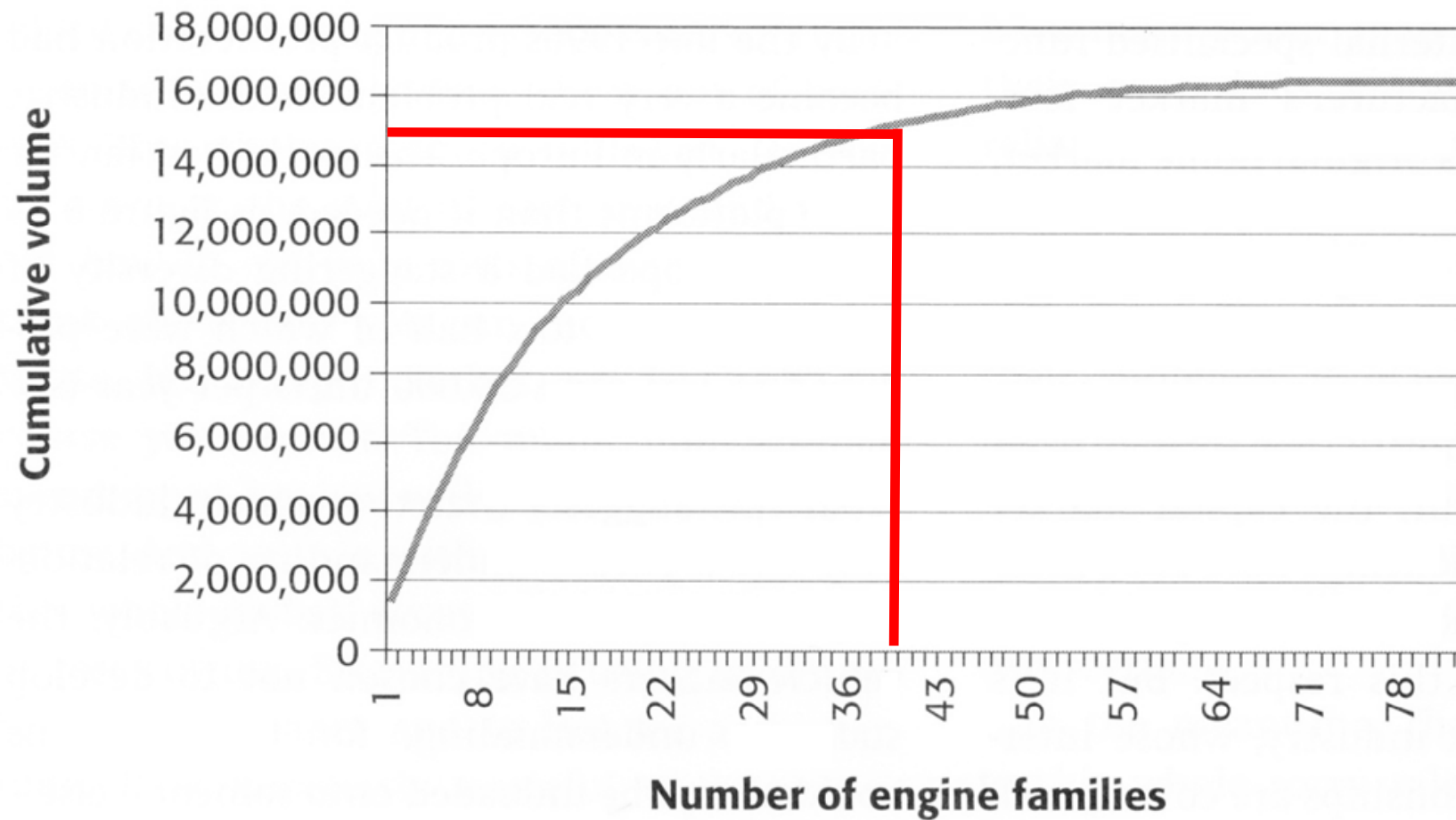
Note: This chart is based on a different forecast from other projections on vehicle production provided in this book from a different source, assuming steady but slow growth. If the other, less positive, projections prove more accurate, then the capacity utilisation rate will be lower than indicated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

Expansion an Plattformen



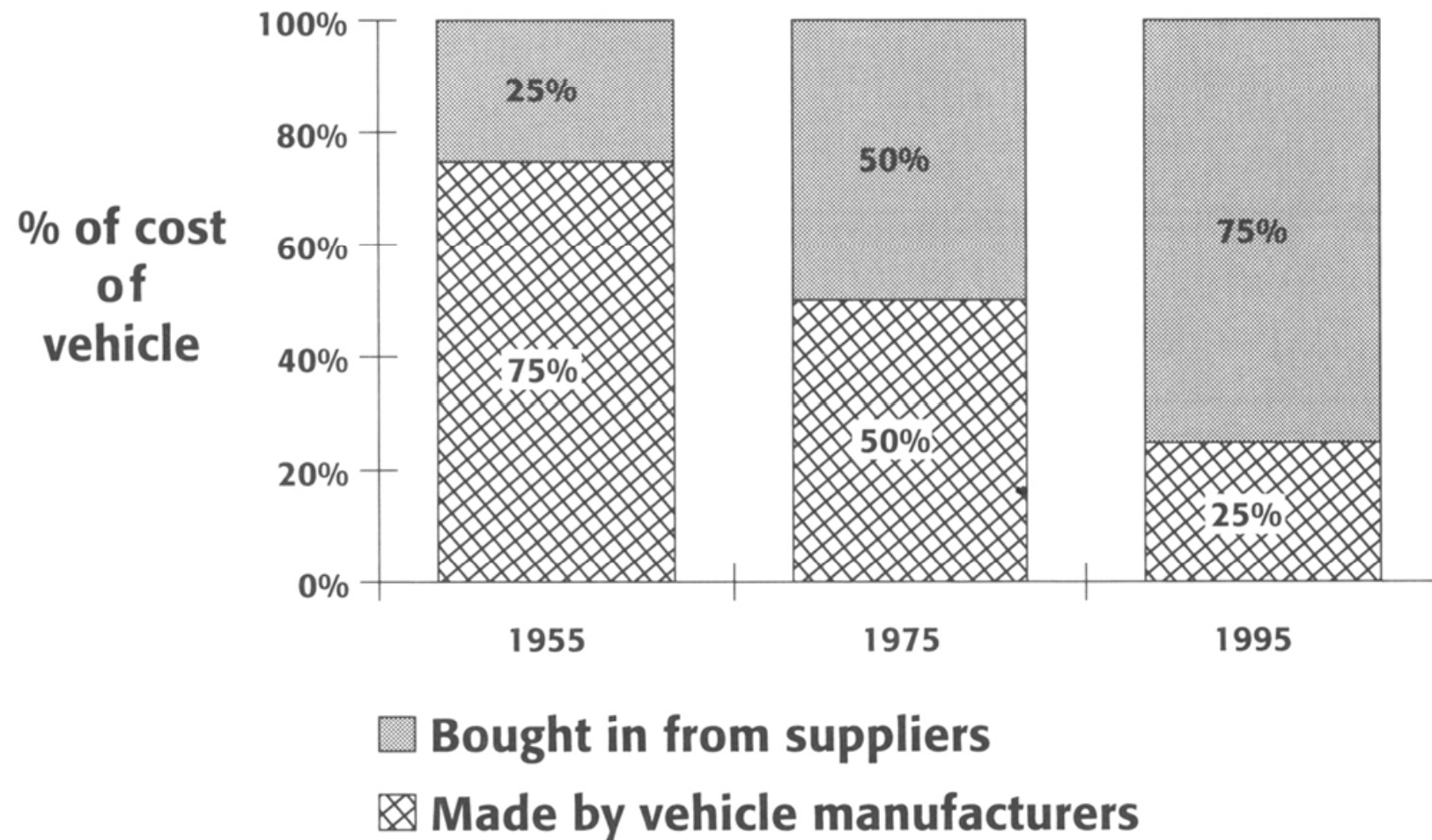
Source: autoPOLIS

Expansion an Motorenfamilien



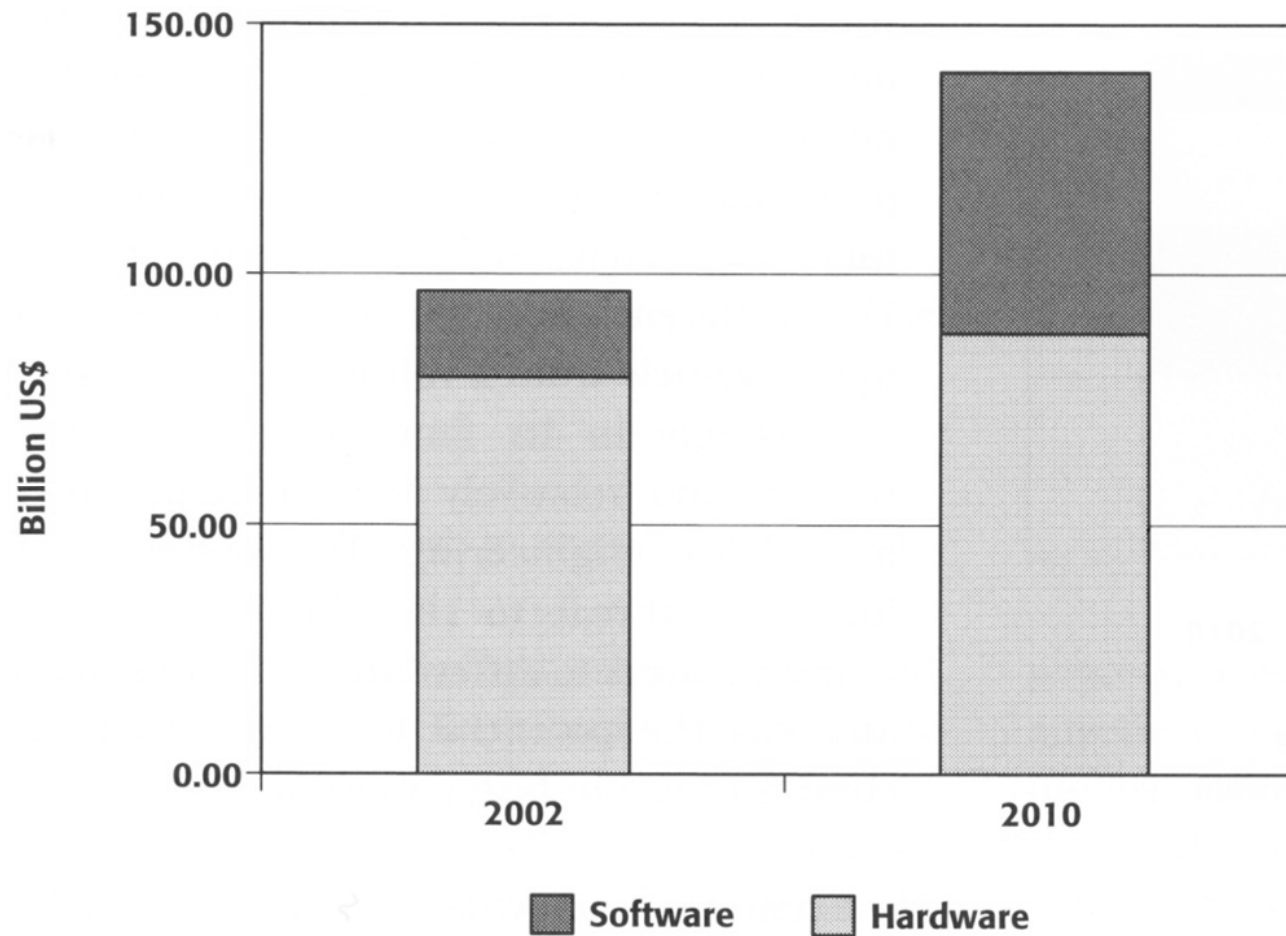
Source: autoPOLIS

Die Autowelt auf den Kopf gestellt



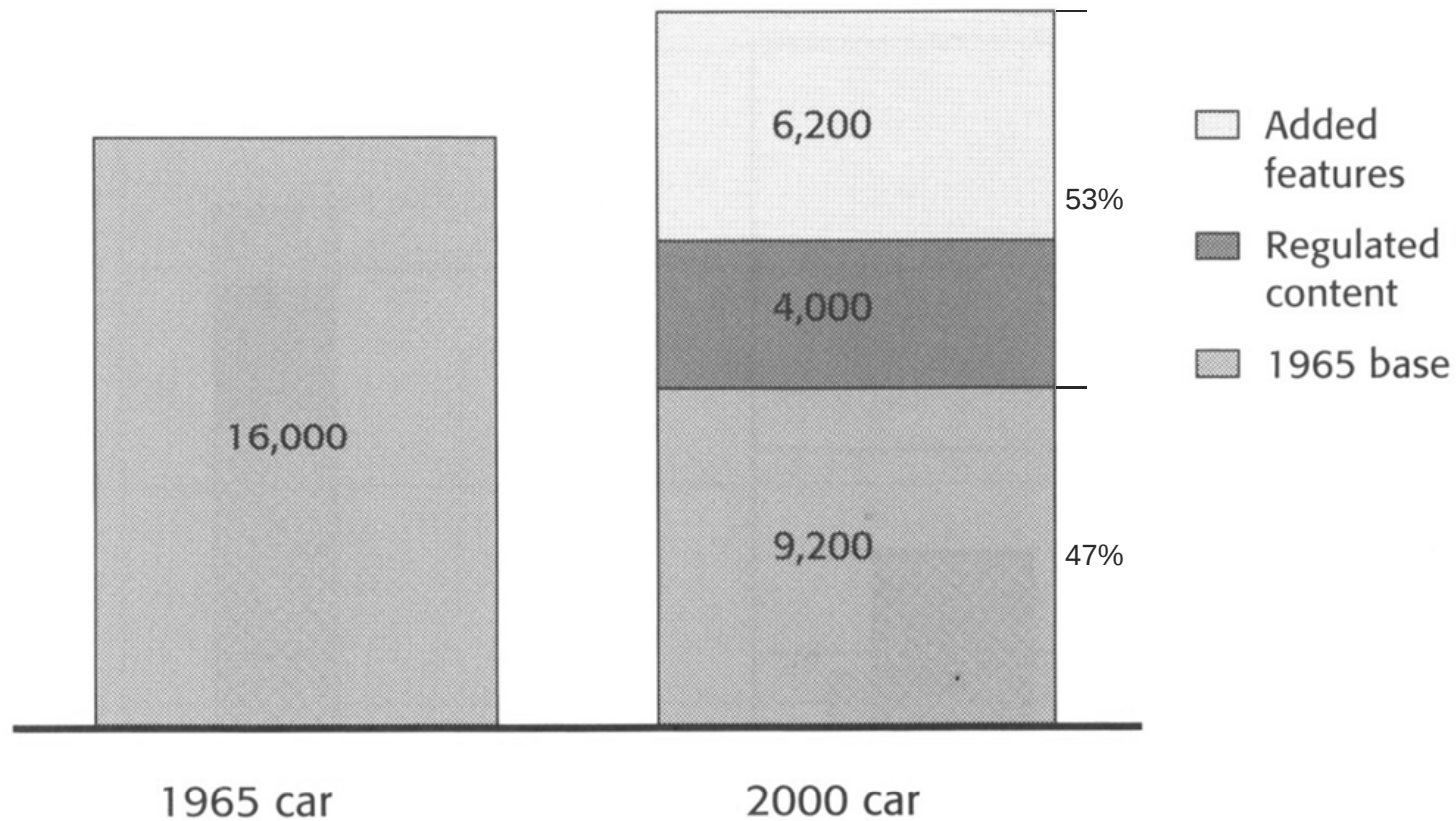
Source: autoPOLIS

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

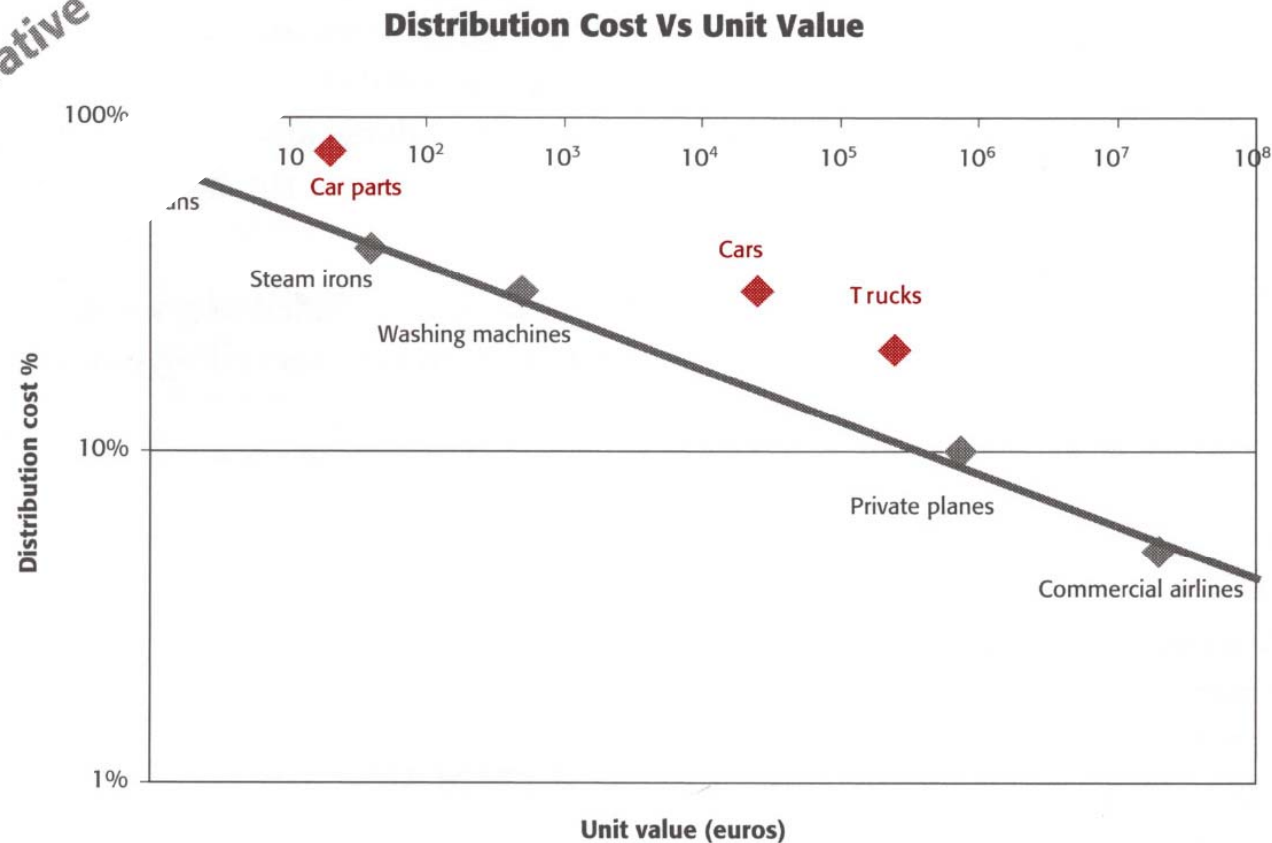


Source: Glenn Mercer, 'The Global Automotive OEM and Automotive Supplier Industry', McKinsey & Company, 26 September 2002

Note: Values are in year 2000 constant dollars, for an average-sized US car

Effizienzvergleich mit anderen Distributions-Sektoren

Illustrative



Source: autoPOLIS

Gruppenfreistellungsverordnung



Was hat die neue GVO gebracht?

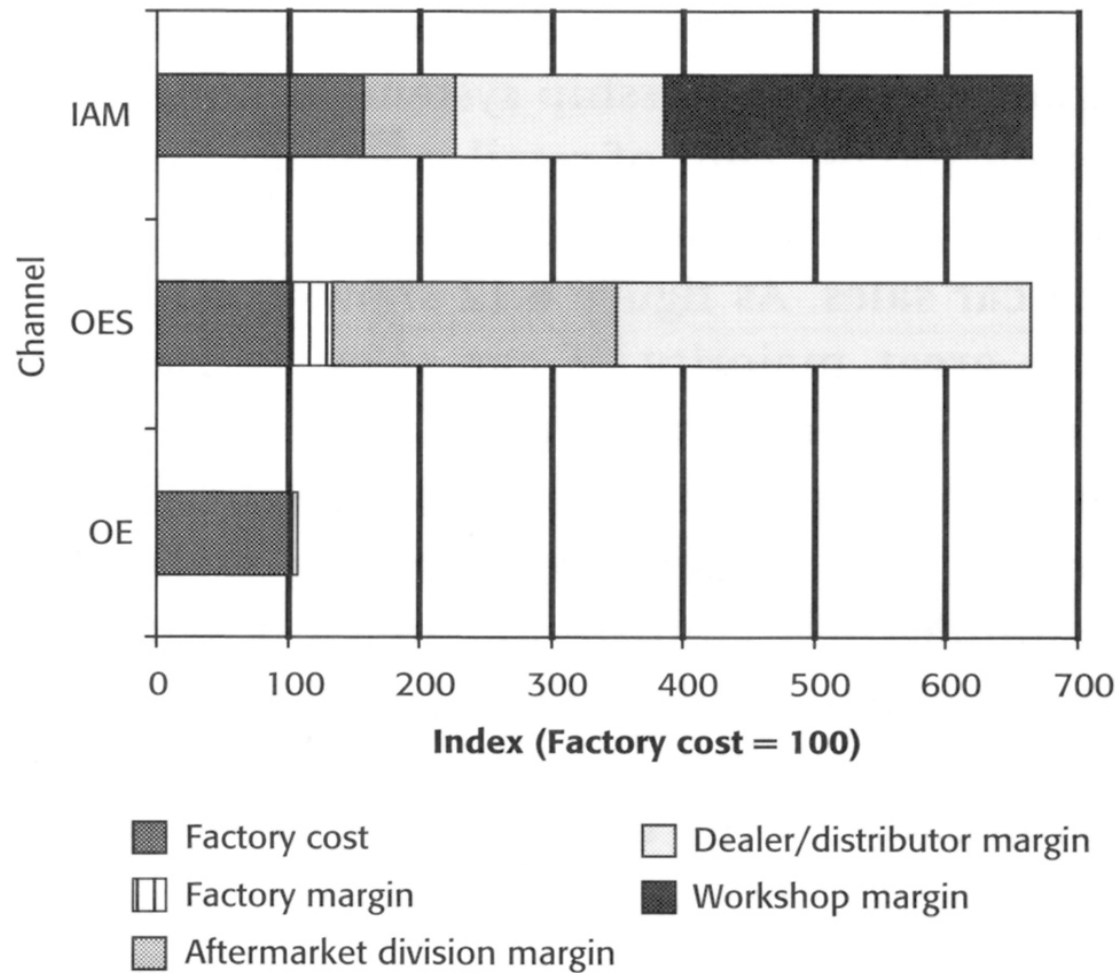
	Europe, old	Europe, new	US
Reselling	Banned	Allowed in exclusive distribution	Allowed
VM direct sales	Allowed	Allowed	Banned
Multi-branding	Strongly restricted	Allowed	Allowed
Dealer protection	Weak	Strengthened	Strong
Sales–service link	Imposed	Not imposed	Not imposed

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

FIGAS Branchenspiegel/Berichtsjahr 2007

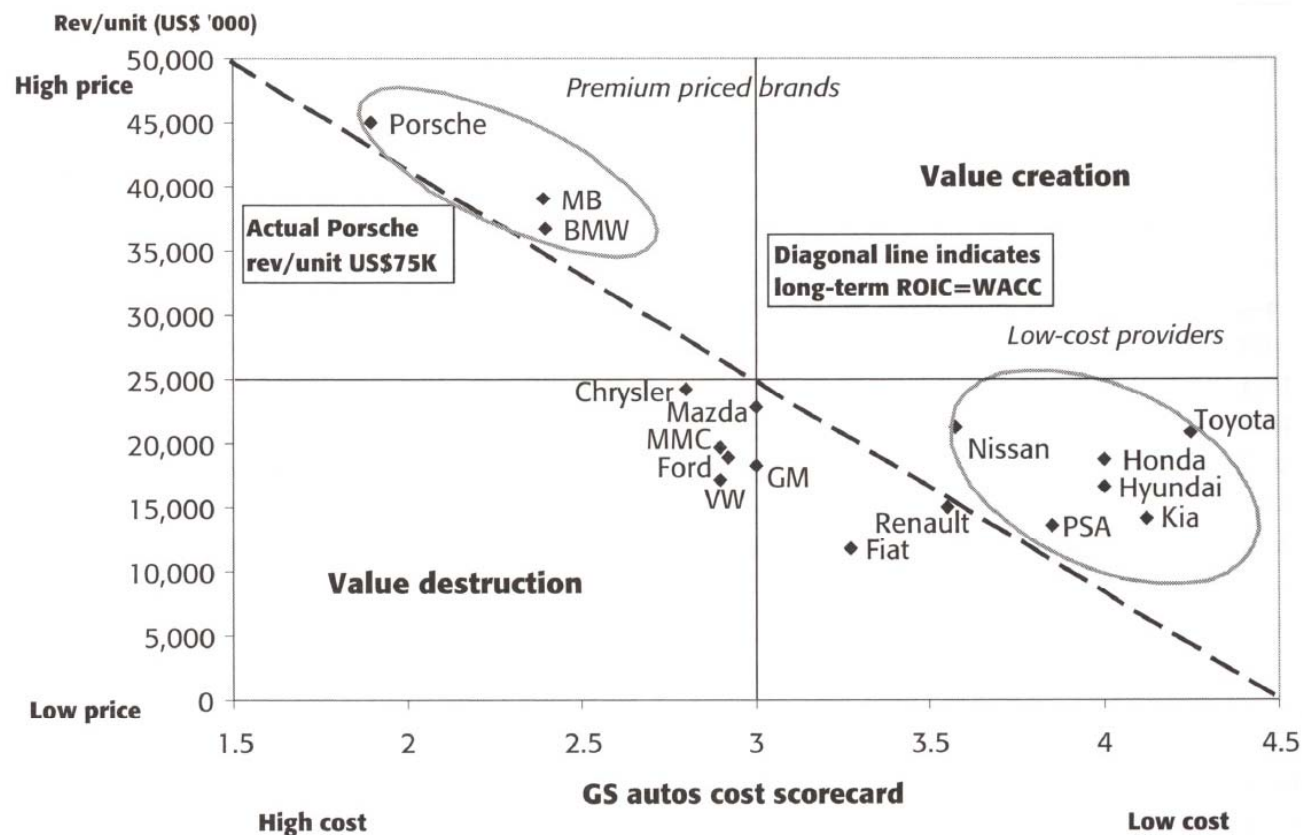
	Branchenspiegel CH
Cash-Flow	2.50%
Betriebsgewinn	2.00%
BG NW Detail m. Bonus	9.30%
BG NW an Agenten	3.40%
BG Occasionen	6.50%
BG Teile	25.00%
SAF-Factor	66.90% aus TrendFocus Q3/07
Mietaufwand in % von Umsatz	2.20% 1.6% bei Umsatz > 15 Mio.

Ersatzteilmargen-Struktur



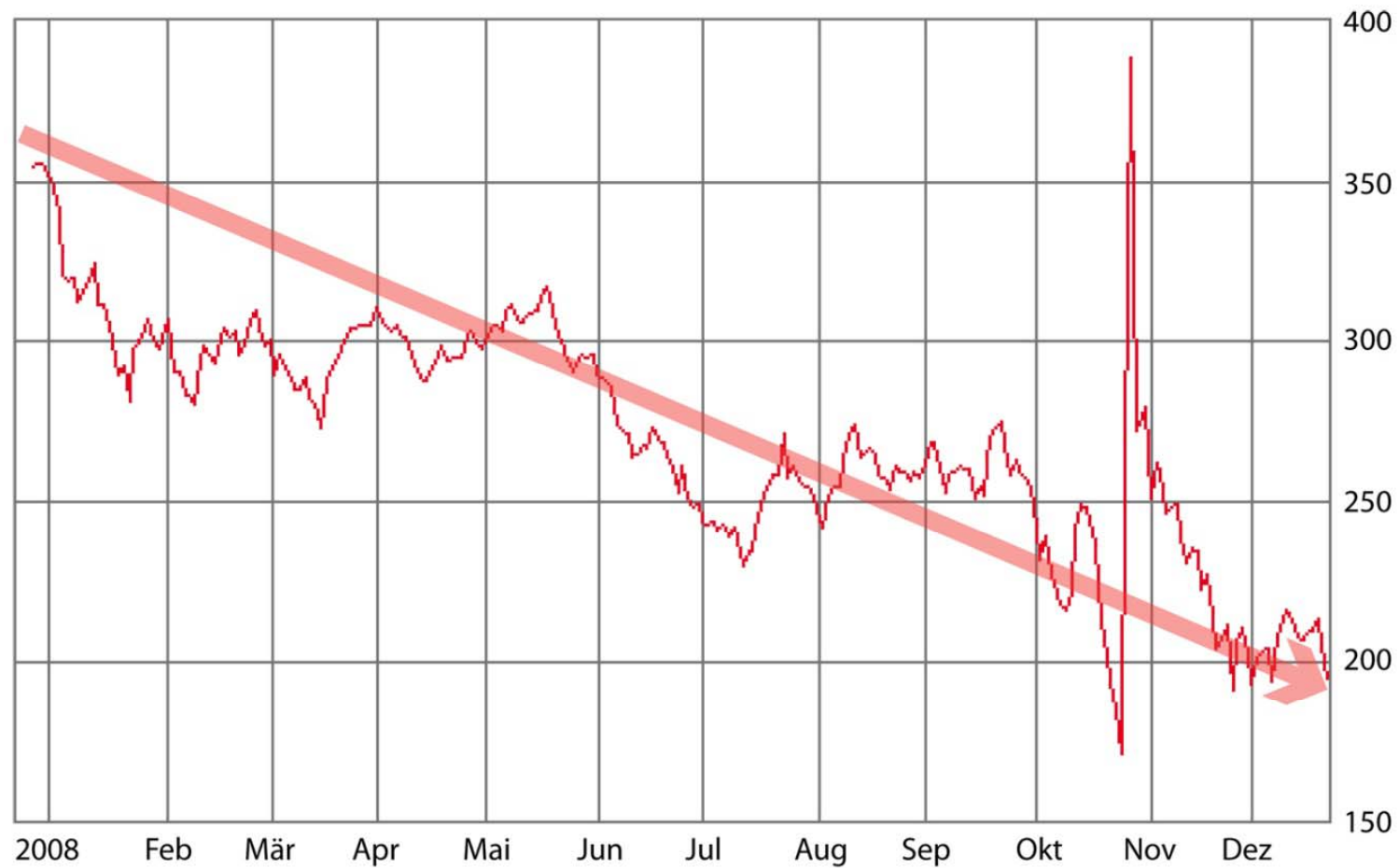
Source: Component supplier

Wer Wertschöpfung generiert



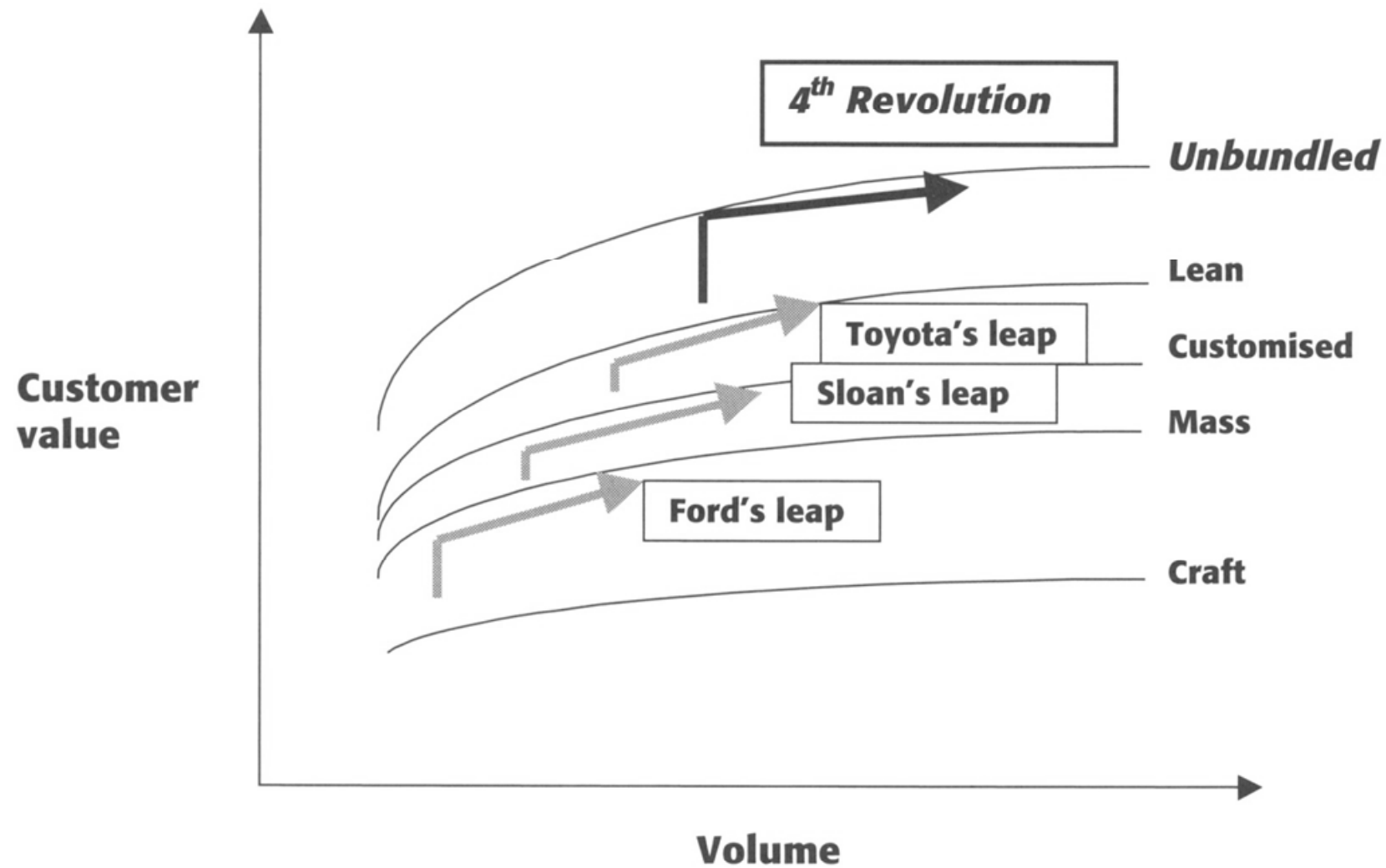
Source: Goldman Sachs Japan

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



© 1990-2008 OnVista Gruppe

Die vierte Automobil-Revolution



Source: autoPOLIS

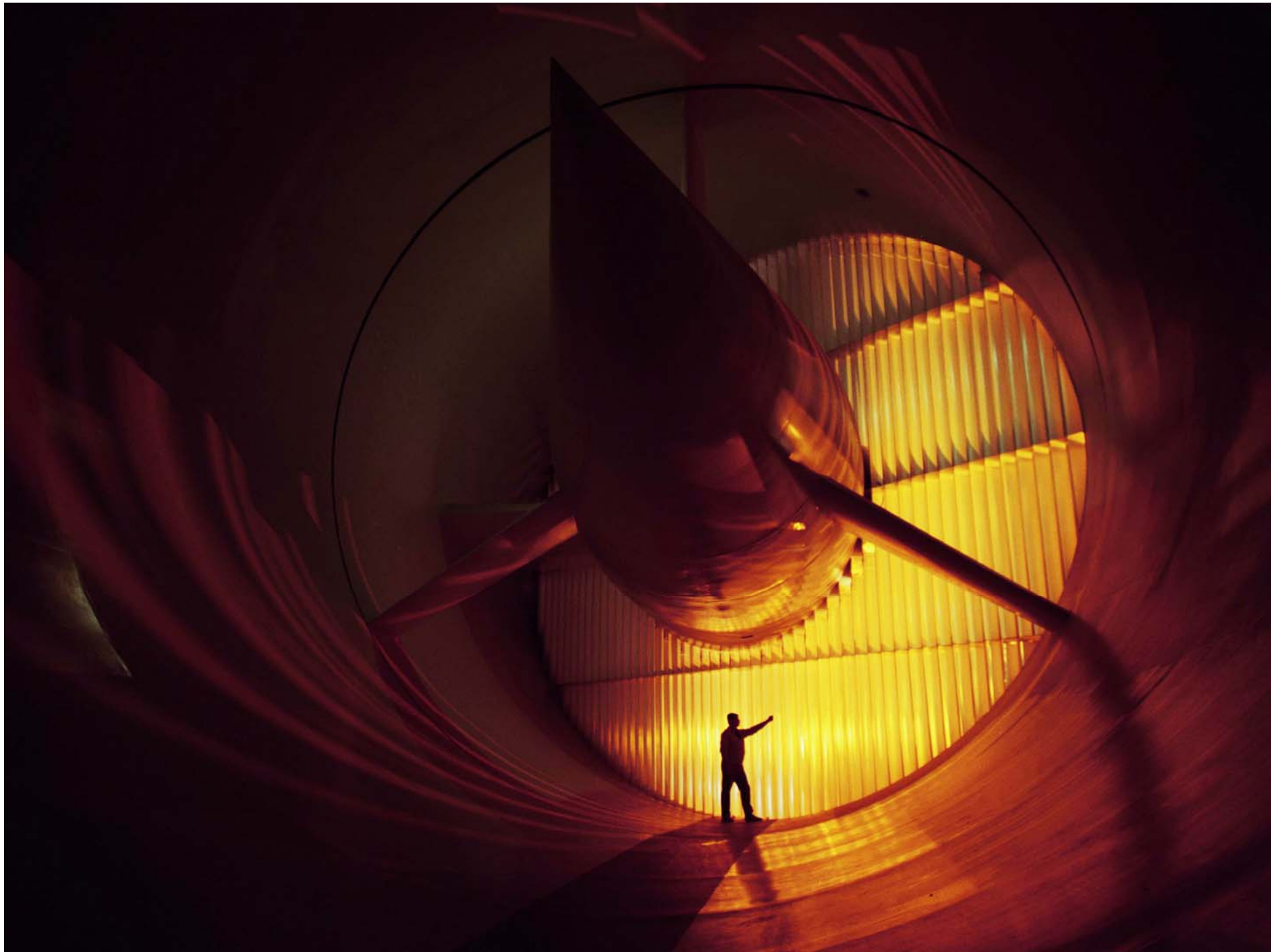
Preiseinsparungen bei europäischem Durchschnittsfahrzeug

	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: autoPOLIS, adapted from Deutsche Bank *The Drivers*, table 6, p. 23.









A large iceberg floats in a deep blue ocean under a clear sky. The visible tip of the iceberg is small and jagged, while the submerged part is much larger and more complex in shape, with a large central cavity. The water is a deep, dark blue, and the sky is a lighter blue with some wispy clouds.

Vielen Dank...

Fuer Ihre
Aufmerksamkeit...