

# **Annual Strategy Dossier - 2013-2014 - World's 7 Leading Automotive OEMs - Key Strategies, Plans, SWOT, Trends & Strategic Outlook - GM, Toyota, Ford, Volkswagen, Daimler, BMW & Fiat**

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## **Abstracts**

The global automotive industry landscape has undergone a major transformation since the global economic crisis of 2008 with the complete transformation of Detroit 3 that has led to resurgence of GM & a combined Fiat-Chrysler entity, stronger focus on compact & more fuel efficient vehicles, surge of interest in as well as expanding capabilities of pure electric vehicles (EVs) & plug-in hybrids and the strengthening of focus on & investments in emerging markets by almost all key global OEMs.

The industry, however, continues to face a number of significant challenges amid the backdrop of a difficult, complex & uncertain global macroeconomic environment led by the European debt crisis and the continuing U.S. economic difficulties coupled with the sporadic global currency exchange rate fluctuations, especially, the surge in U.S. Dollar against all major global currencies that is impacting profitability and the simultaneous, significant weakening of Japanese Yen that has bolstered Japanese exports. The impact of the exchange rate fluctuations has been differential across markets. For instance, the Australian Government has announced a \$177 million incentive package in early August 2013 for the automotive industry aimed at offsetting the continued strength of Australian Dollar against the USD that has impacted profitability across OEMs and has led to Ford's scheduled wind-up of its manufacturing operations in Australia from 2016. The softening of global commodity prices of-late and the recent drop in crude prices, however, have so far been favourable for the industry.

The automotive sales in the U.S. reached the 14.5 million units level in 2012, registering a 13.5% growth; the industry's best-ever performance since the pre-crisis average level

of 17 million vehicles driven by the economic recovery, strong replacement demand fuelled by new product introductions and prevailing, favourable interest rates. The going so far has been steady for the industry in H1 2013 with CUVs & Pickups dominating sales thereby boosting the overall prospects, market shares & profitability for the Detroit 3. Further, projections for the year 2013 indicate towards a healthy 5% sales growth at 15.5 million units level and 2014 estimates indicate towards a continued, steady recovery with the industry likely to touch the 16 million units mark. The European industry, on the other hand, witnessed its worst ever year in 2012 with demand contracting by 8.2% to the 12.05 million vehicles level, lowest since 1993 and the projections for 2013 indicate towards a further 3% contraction in sales. Emerging markets, on the other hand continue with their growth momentum albeit slower economic growth rates.

Most leading OEMs are in the process of aligning & fine-tuning their strategies with emerging as well as latent industry trends & developments. All key global industry OEMs have outlined an array of strategies & plans aimed at navigating through the rough terrain with streamlining of overall cost base through consolidation of industrial footprint, especially, in Western Europe with the industry poised to bottom out, introduction of new product platforms & variants driven by cutting-edge technologies & innovations with new introductions likely to spearhead demand growth across traditional markets through 2018 and significant growth in investments by OEMs towards emerging markets aimed at deepening local roots across these markets with a significant share of global demand likely to originate from emerging markets over medium term.

The report analyzes, looks into & provides strategic insights into the key strategies & plans crafted & being pursued by the 7 leading, traditional automotive OEMs, namely, GM, Toyota, Ford, Volkswagen, Daimler, BMW & Fiat-Chrysler to navigate through the shifting dynamics of the global automotive industry with individual mobility patterns experiencing significant changes across traditional as well as emerging markets and the continued string of product renewals across the industry driven by technological innovations emanating from strong R&D activity.

### **Key Strategies & Plans included in the Report for each OEM:**

1. Product Portfolio Strategies & Plans
2. Market Specific Strategies & Plans - Traditional & Emerging Markets
3. R&D Strategies & Plans
4. Growth Strategies & Plans
5. Business and Corporate Strategies & Plans

6. Sales & Marketing Strategies & Plans
7. Production/Manufacturing Strategies & Plans

### **Key Excerpts/Findings from the Report:**

1. Analysis of GM's overall product portfolio strategies, platform strategies for its flagship EV, Volt, strengthening of North American industrial footprint besides analysis of plans for struggling European operations that have been impacting profitability.
2. Analysis of Toyota's New Product Development Strategy through 2015 to be spearheaded by Plug-in Hybrids, EVs & Fuel Cell based vehicle platforms and the Toyota New Global Architecture (TNGA) besides analysis of TMC's Branding, R&D & Market specific strategies.
3. Analysis of Ford's plans & ongoing spate of investments towards catapulting its global sales revenues from 2015 with Asia led by China at the core and international diversification of manufacturing footprint.
4. Analysis of Volkswagen's plans to reach 1million vehicle sales mark in North America by 2018 as part of underlying plans to take on GM for global leadership in terms of vehicle sales by 2018.
5. Analysis of Daimler & BMW's strategies aimed at offsetting the ongoing European market slump by boosting sales growth in North America & emerging markets through deployment of market specific growth strategies and plans to expand manufacturing footprint across these markets.
6. Fiat's plans to leverage its existing European manufacturing footprint as an international export hub by altering overall product mix, plans to leverage Chrysler's global footprint more effectively and achieve significant growth in luxury vehicle sales globally.
7. Emerging Markets to Spearhead Global Industry Growth over Medium Term, especially, pertaining to luxury vehicles & SUVs
8. Analysis of key individual mobility trends & patterns across traditional markets and rapidly growing urbanization trend across emerging markets.
9. Analysis of a growing vehicle exports trend likely to originate from emerging markets over near to medium term.
10. Analysis of growing industry risks for overcapacity, especially, in Western Europe
11. Analysis of Key Technological Trends & Innovations Likely to Shape the Future of the Industry

### **Relevance & Usefulness: The report will be useful for**

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment & Analysis for each key OEM

Strategic Insights into key Business Strategies & Plans being pursued by each key OEM

Gaining a Strategic Perspective through a Comprehensive SWOT Analysis & Strategic Outlook for all key players for 2013-2014

Gaining access to Key Industry as well as Market Trends, Insights & Growth Opportunities

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

Identifying & highlighting areas for Potential Strategic Changes, Adjustments & Realignment

### **For Whom:**

The report would be essential for those having strategic interest in the Global Automotive Industry or any of these companies as a perfect complement to & in combination with existing market research reports on the global automotive industry & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, industry & company analysts & those associated with the industry or any of these companies.

### **Highlight:**

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

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