Opportunities in North America

March 2012
Agenda

• North American Production Overview
• Best Selling Vehicles
• OE Purchasing & Engineering Locations
• Recent Announcements
• Trends in North America
• Team Australia Automotive
• U.S. Mission

Sources: IHS, Automotive News, Washington Post
North American Production Analysis
North American Production Overview
OEM Production Analysis 2011-2019

Contribution to Growth 2011 to 2019

- Toyota
- Honda
- GM
- Hyundai
- VW
- Other

Output Millions

0.0 0.5 1.0 1.5 2.0 2.5 3.0 3.5 4.0

2011 2015 2019
## Best selling vehicles of 2011 in U.S.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Vehicle</th>
<th>2011 Total Volume</th>
<th>Platform</th>
<th>Image</th>
<th>Primary Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Ford F-Series</td>
<td>584,917</td>
<td>PN96</td>
<td><img src="image1.png" alt="Image" /></td>
<td>Dearborn, MI</td>
</tr>
<tr>
<td>2.</td>
<td>Chevrolet Silverado</td>
<td>415,130</td>
<td>K2XX</td>
<td><img src="image2.png" alt="Image" /></td>
<td>Warren, MI</td>
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<tr>
<td>3.</td>
<td>Toyota Camry</td>
<td>308,510</td>
<td>051A</td>
<td><img src="image3.png" alt="Image" /></td>
<td>Toyota City, Japan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ann Arbor, MI</td>
</tr>
<tr>
<td>4.</td>
<td>Nissan Altima</td>
<td>268,981</td>
<td>L42L</td>
<td><img src="image4.png" alt="Image" /></td>
<td>Guyancourt, France</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Farmington Hills, MI</td>
</tr>
<tr>
<td>5.</td>
<td>Ford Escape SUV</td>
<td>254,293</td>
<td>C520</td>
<td><img src="image5.png" alt="Image" /></td>
<td>Cologne, Germany</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Dearborn, MI</td>
</tr>
</tbody>
</table>
# Best selling vehicles of 2011 in U.S.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Vehicle</th>
<th>2011 Total Volume</th>
<th>Platform</th>
<th>Image</th>
<th>Primary Design</th>
<th>Secondary Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Honda Accord/Crosstour</td>
<td>253,599</td>
<td>2GA</td>
<td><img src="image" alt="Honda Accord" /></td>
<td>Tochigi, Japan</td>
<td>Marysville, OH</td>
</tr>
<tr>
<td>7.</td>
<td>Ford Fusion</td>
<td>248,067</td>
<td>CD391</td>
<td><img src="image" alt="Ford Fusion" /></td>
<td>Dearborn, MI</td>
<td>Cologne, Germany</td>
</tr>
<tr>
<td>8.</td>
<td>Ram Pick-Up</td>
<td>244,763</td>
<td>DJ/DS</td>
<td><img src="image" alt="Ram Pick-Up" /></td>
<td>Detroit</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>Toyota Corolla/Matrix</td>
<td>240,259</td>
<td>150A</td>
<td><img src="image" alt="Toyota Corolla/Matrix" /></td>
<td>Toyota City, Japan</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>Chevrolet Cruze</td>
<td>232,588</td>
<td>Global Delta</td>
<td><img src="image" alt="Chevrolet Cruze" /></td>
<td>Russelsheim, Germany</td>
<td>Warren, MI</td>
</tr>
</tbody>
</table>
North American OEMs

- Normal, IL – Mitsubishi NA Purchasing
- Spartanburg, SC – BMW NA Purchasing
- Vance, AL – Daimler NA Purchasing
- Aguascalientes, MX – Nissan NA Purchasing
- Puebla, MX – Volkswagen NA Purchasing
- Ann Arbor, MI – Toyota Secondary Design NA
- Farmington Hills, MI – Nissan NA Purchasing & NA Secondary Design
- Ann Arbor, MI – Toyota Secondary Design NA
- Marysville, OH – Honda NA Purchasing & NA Secondary Design
- Lafayette, IN – Subaru NA Purchasing
- Smyrna, TN – Nissan NA Purchasing
- Chattanooga, TN – Volkswagen NA Purchasing
- Spartanburg, SC – BMW NA Purchasing
- Vance, AL – Daimler NA Purchasing
- West Point, GA – Hyundai/Kia NA Purchasing
- Montgomery, AL – Hyundai/Kia NA Purchasing
- Palo Alto, CA – Tesla
- Santa Monica, CA – Coda
- Anaheim, CA – Fisker

Symbols:
- ★ = Significant North American Customer Activity/Presence
- = Moderate North American Customer Activity/Presence
- = Little or No North American Customer Activity/Presence

North American Heavy Truck Market

- **Bellevue, WA** – PACCAR: Kenworth, Peterbilt
- **Portland, OR** – Daimler Trucks: Freightliner, Sterling, Western Star
- **Lisle, IL** – Navistar/International
- **Greensboro, NC** – Volvo Trucks: Mack

Legend:
- ★ = Significant North American Customer Activity/Presence
- ★★ = Moderate North American Customer Activity/Presence
- ★★★ = Little or No North American Customer Activity/Presence

[Map of North American Heavy Truck Market]
Recent Announcements

Automotive News: **GM, PSA: Alliance packs big promises**

*In purchasing, for instance, GM and PSA said they will create by year end a group to oversee joint global purchasing. It will control the $123 billion in global spending by both companies - $93 billion for GM and $30 billion for PSA.*

Automotive News: **LaSorda: Fisker will turn a profit in 2013**

*Fisker Automotive’s new CEO, Tom LaSorda, says the electric vehicle maker will be profitable in 2013 from sales of its Karma extended-range hybrid alone.*

LaSorda said he hopes the expected 2013 profit will attract more funding from the DOE or others.

Washington Post: **Start-up Bright Automotive will close its doors**

*An Indiana electric vehicle company that had planned to build energy-efficient fleet trucks announced Tuesday it will close down this week, and it blamed the Obama administration for stringing the company along for three years with promises of a federal loan.*

The Associated Press: **More Natural gas vehicles hitting the market**

*Chrysler will sell a Ram 2500 Heavy Duty pick up that runs on compressed natural gas starting in July. The truck has both a gasoline tank and a natural gas storage tank, and its engine shifts seamlessly between the two power sources. The truck can run for 255 miles on natural gas and another 367 miles using gasoline.*

*Chrysler will have competition. Late this year, General Motors Co. will sell natural-gas versions of two pickups – the Chevrolet Silverado and GMC Sierra 2500 HD. The GM trucks will run on gasoline and natural gas for 650 miles.*

US News: **Mandatory Backup Camera Legislation Delayed**

*Backup cameras are becoming common features on passenger vehicles, and with good reason.*

*Unfortunately, that law may go into effect much later than 2014. “The Obama administration has asked for more time to finalize proposed rules that would require backup cameras in all vehicles by late 2014.*

Automotive News: **Startup sees 50% cost cut from battery innovation**

*A startup backed by General Motors said last week that it has developed a breakthrough lithium ion battery that could slash the cost of electric vehicles.*

*Envia Systems said the lighter and more powerful battery cells could reduce by more than half the cost of a battery pack in an EV with a 300-mile electric range.*
• VVT almost standard on any new engine; many migrating to DOHC, twin independent design
• GDI and gas boosting both ramp up quickly. The initial rollout is being led by American and German manufacturers, although the others aren’t far behind
• Stop/Start technology growing, although fuel economy gains are in question given US test cycle
• Diesel and hybrid still relatively low-volume players in North American market
North America Electrification Outlook

Installation into Light Vehicles Manufactured in North America

- Hybrid-Full
- Hybrid-Mild
- ICE
- ICE: Stop/Start
- Electric
Trends in North America

- Improve Fuel Economy
- Lightweight Materials/Weight Reduction
- Upgraded Interior Features
- New Technology and Feature Content (connectivity)
- Localization of Products to Optimize Costs
  - Particularly Japanese and Korean Manufacturers
- Global Support from Supply Base
- OEM desire to be Leader in Hybrid and Electric Cars
- OEM Alliances
  - GM/Peugeot
  - Toyota/BMW
  - Daimler/Renault-Nissan
## Global Platforms

<table>
<thead>
<tr>
<th>OEM</th>
<th>Platform</th>
<th>Program</th>
<th>Vehicle</th>
<th>SOP</th>
<th>Peak Volume</th>
<th>Primary Design</th>
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<tbody>
<tr>
<td>Ford</td>
<td>C1 MCA</td>
<td>C346 (2)</td>
<td>Focus</td>
<td>1Q 2017</td>
<td>320,000</td>
<td>Cologne</td>
</tr>
<tr>
<td></td>
<td></td>
<td>C520 (2)</td>
<td>Escape</td>
<td>3Q 2017</td>
<td>325,000</td>
<td>Cologne</td>
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<tr>
<td></td>
<td></td>
<td>C489</td>
<td>Lincoln CUV</td>
<td>4Q 2013</td>
<td>36,000</td>
<td>Cologne</td>
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<tr>
<td>CD 4</td>
<td>CD391 (2)</td>
<td>Fusion</td>
<td>3Q 2018</td>
<td>350,000</td>
<td>Dearborn</td>
<td></td>
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<tr>
<td></td>
<td>CD533 (2)</td>
<td>Lincoln MKZ</td>
<td>3Q 2017</td>
<td>36,000</td>
<td>Dearborn</td>
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<tr>
<td></td>
<td>CD539</td>
<td>Edge</td>
<td>3Q 2014</td>
<td>178,000</td>
<td>Dearborn</td>
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<tr>
<td></td>
<td>D568</td>
<td>Taurus</td>
<td>3Q 2015</td>
<td>117,000</td>
<td>Dearborn</td>
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<tr>
<td></td>
<td>U502 (2)</td>
<td>Explorer</td>
<td>4Q 2015</td>
<td>220,000</td>
<td>Dearborn</td>
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<tr>
<td>GM</td>
<td>Global Alpha</td>
<td>A2SL</td>
<td>Cadillac ATS</td>
<td>2Q 2018</td>
<td>126,000</td>
<td>Warren</td>
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<tr>
<td></td>
<td></td>
<td>A2LL</td>
<td>Cadillac CTS</td>
<td>2Q 2018</td>
<td>68,000</td>
<td>Warren</td>
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<tr>
<td></td>
<td></td>
<td>Camaro</td>
<td>1Q 2015</td>
<td>102,000</td>
<td>Warren</td>
<td></td>
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<tr>
<td>Global Delta</td>
<td>D2SC</td>
<td>Cruze</td>
<td>4Q 2014</td>
<td>270,000</td>
<td>Russelsheim</td>
<td></td>
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<tr>
<td></td>
<td>D2UB/C</td>
<td>Equinox</td>
<td>2Q 2014</td>
<td>190,000</td>
<td>Russelsheim</td>
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<tr>
<td>Global Gamma</td>
<td>G2UC</td>
<td>Chevy CUV</td>
<td>1Q 2017</td>
<td>133,000</td>
<td>Warren</td>
<td></td>
</tr>
<tr>
<td></td>
<td>G2SC</td>
<td>Sonic</td>
<td>1Q 2017</td>
<td>150,000</td>
<td>Warren</td>
<td></td>
</tr>
<tr>
<td></td>
<td>G2UG</td>
<td>Granite</td>
<td>3Q 2018</td>
<td>40,000</td>
<td>Warren</td>
<td></td>
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<tr>
<td>Toyota</td>
<td>MC – M</td>
<td>051A(2)</td>
<td>Camry</td>
<td>3Q 2016</td>
<td>420,000</td>
<td>Nagoya/Ann Arbor</td>
</tr>
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</tbody>
</table>
What is Team Australia Automotive?
Terry Barr Sales

Company Overview

Headquarters        Southfield, Michigan
European Office     Frankfurt, Germany
Employees           20 employees, including 15 sales professionals
Since               1957
Represented Partners 16 supplier partners from around the world
Company Overview

Headquarters    Southfield, Michigan
Japan Offices    Nagoya, Japan & Tokyo, Japan
Employees    12 employees, including 10 sales & engineering professionals
Since    1953
Represented Partners    8 supplier partners from around the world
Main Customers

<table>
<thead>
<tr>
<th>OES/Aftermarket</th>
<th>OEM</th>
<th>Tier I</th>
<th>Tier I</th>
<th>Tier I</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACDelco</td>
<td>GM</td>
<td>DELPHI</td>
<td>BorgWarner</td>
<td>GUARDIAN</td>
</tr>
<tr>
<td>Service Parts Operations</td>
<td>CHRYSLER</td>
<td>Visteon</td>
<td>ArvinMeritor</td>
<td>LEAR CORPORATION</td>
</tr>
<tr>
<td>MOPAR</td>
<td>FORD</td>
<td>Continental</td>
<td>MOTOROLA</td>
<td>OP INDUSTRIES</td>
</tr>
<tr>
<td>Motorcraft</td>
<td>VOLKSWAGEN</td>
<td>TRW</td>
<td>faurecia</td>
<td>Valeo</td>
</tr>
<tr>
<td>NAPA</td>
<td>NISSAN</td>
<td>faurecia</td>
<td>faurecia</td>
<td>Valeo</td>
</tr>
<tr>
<td>Pep Boys Auto</td>
<td>BMW</td>
<td>Continental</td>
<td>faurecia</td>
<td>Valeo</td>
</tr>
<tr>
<td>Parts, Service and So Much More</td>
<td>Toyota</td>
<td>JOHNSON CONTROLS</td>
<td>faurecia</td>
<td>Valeo</td>
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<tr>
<td>Canadian Tire</td>
<td>MITSUBISHI MOTORS</td>
<td>JOHNSON CONTROLS</td>
<td>faurecia</td>
<td>Valeo</td>
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<tr>
<td></td>
<td>MAZDA</td>
<td>JOHNSON CONTROLS</td>
<td>faurecia</td>
<td>Valeo</td>
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<tr>
<td></td>
<td>SUBARU</td>
<td>JOHNSON CONTROLS</td>
<td>faurecia</td>
<td>Valeo</td>
</tr>
</tbody>
</table>

Among Others...
What can TAA Do for You?

In-Market Support

- Each Member Company is unique depending on the level or type of support required.
  - No Presence Currently in North America
    - Market is wide open.
    - Identify all potential customers
  - Some Presence Currently in North America
    - Target specific customers
      - Market Research
      - Introductions to Purchasing or Engineering
  - Technology Companies
    - Identify Joint Venture Partners
    - Identify Potential Licensing Partners
    - Identify companies willing to buy the technology
How Can TAA Benefit You?

- Experience and knowledge of the NA Automotive Market
- Assist with your NA Market Business Strategy
- Product introduction into North America
- Local sales and marketing team
- Existing High Level Purchasing and Engineering relationships
- Liaison quotation activities
To Become a TAA Member

Contact:
ICN – Andy Balmain abalmain@icnvic.org.au
DBI – Linny Thom linny.thom@dbi.vic.gov.au
FAPM – Edwin Vandenberg edwin.vandenberg@fapm.com.au
TAA – Steve Schubeck schubeck@teamausaauto.com
Bill Narens bnarens@naisales.com
Randy Blackman rblackman@naisales.com
Q & A
April 2011 Trade Mission
April 2011 Trade Mission

Delegation Members

TAA Member Companies

- Air International
- Futuris
- CSIRO
- CIT
- DaviesCraig
- Disc Brakes Australia
- NSA
- Lumen
- Pedders
- DC Ross

Government Agencies

- DIISR
- ICNL
- ICN Victoria
- Austrade
- Victorian Government
April 2011 Trade Mission

Mr. Diarmuid O’Connell
Vice President of Business Development
April 2011 Trade Mission

Mr. Amit Nisenbaum
Global Operations and Strategy
April 2011 Trade Mission

Tony Brown

Name: Tony (Thomas K.) Brown
Title: Group Vice President, Global Purchasing
Company: Ford Motor Company

Tony (Thomas K.) Brown is group vice president, Global Purchasing, Ford Motor Company, effective April 1, 2008. He had been senior vice president for Global Purchasing since September 2004, and had been vice president for the same area since January 2002. In his role, Brown is responsible for approximately $65 billion of production and non-production procurement for Ford operations worldwide.

Before being named vice president, Brown was executive director, Manufacturing Procurement Operations – Ford Global Purchasing. Before his role as executive director, he was director, Ford Purchasing Global Strategic Planning and Process Leadership.

Brown joined Ford in July 1999 from United Technologies Automotive, where he was vice president of Supply Management. Before joining United Technologies Automotive, he was executive director of corporate purchasing and transportation for QMS Inc., a maker and provider of networked enterprise printing solutions.

Brown holds a bachelor's degree in economics and finance from American International College in Springfield, Mass.

In 2008, Rainbow/PUSH honored Brown with the “Keep Hope Alive” award, and in 2006, he received the National Action Network’s “Keeper of the Dream” award. Brown serves as a board member on Business for Social Responsibility, and is active with The Boys & Girls Clubs of Southeastern Michigan, The Michigan First Tee, and Focus: HOPE
April 2011 Trade Mission

Mark Reuss

Name: Mark Reuss  
Title: President of General Motors North America  
Company: General Motors

Mr. Mark L. Reuss has been President of General Motors North America (North America) at General Motors Company and General Motors de Mexico, S. de R. L. de C.V since December 4, 2009. Mr. Reuss serves as Vice President of General Motors Company.

Mark Reuss was appointed president and managing director of GM Holden Ltd, effective February 1, 2008. Reuss oversees GM's operations in Australia and New Zealand. He also serves on the GM Asia Pacific Strategy Board.

Reuss began his career with General Motors in 1983 as a university student intern with the Noise Vibration Laboratory at the Milford Proving Ground, where he developed valve trains for V6 engines.

Born on October 19, 1963, Reuss received a bachelor of engineering degree in mechanical engineering from Vanderbilt University in 1986 and a master's degree in business administration from Duke University in 1990. He is a certified industry pool test driver on the North Course of the famed Nürburgring motorsport race track in Nürburg, Germany, and has earned his license for Grand American Road Racing.

He is member of the Horizon Upward Bound/Cranbrook Schools Board of Directors and a member of the Vanderbilt University School of Engineering Board of Visitors. Reuss is also GM's key executive for Penn State University.
April 2011 Trade Mission

Name: Sigmund E. Huber  
Title: Senior Director  
Company: Chrysler Group, LLC

Sig Huber is the senior director of Supplier Relations at Chrysler Group LLC, having joined the Company in May 2008. His team is responsible for: improving supplier and industry relationships, communications and events, supplier risk management, supplier assessments, supplier diversity, contract administration, training and development, audit compliance and various other strategic areas within Global Sourcing at Chrysler. He also oversees the procurement of all parts and services for MOPAR.

Prior to joining Chrysler, Mr. Huber was assistant general manager for External and Corporate Affairs for Toyota Engineering & Manufacturing North America. He was with Toyota for nine years and started his career there as senior legal counsel. He later transitioned into business jobs and held a variety of positions within Purchasing and Corporate Affairs.

Mr. Huber is a graduate of the University of California, San Diego.
April 2011 Trade Mission

The Center for Automotive Research

- **Dr. Jay Baron** - President, Chairman & CEO
- **Dr. Sean McAlinden** - Executive Vice President, Research and Chief Economist
- **Brett Smith** - Co-Director, Manufacturing, Engineering, & Technology Group
- **Bernard Swiecki** - Senior Project Manager, Sustainability & Economic Development Strategies
- **Richard Wallace** - Director, Transportation Systems Analysis Group
April 2011 Trade Mission

Original Equipment Suppliers Association

- **Neil De Koker - President and CEO**
- **Michael P. Shapiro - Executive Director, Business Development**
Nissan Technical Center

**Trade Show**

- Exclusively for Team Australia Automotive Companies
- Met with:
  - Carla Bailo
    - Sr. V.P. Nissan North America, R & D of the Americas
  - Teruo Takahashi
    - V.P. of Vehicle Engineering
  - Manabu Sato
    - Director
  - Leo Matvekas
    - Sr. Manager Competitive Engineering
June 2012 Trade Mission
Benefits of Mission Trip

• Opportunity to promote products/services
• Introduction to North American business practices
• Exposure to the high-level executives
• Individual meetings can be arranged prior to Mission
• Networking with other Australian companies
Tentative Schedule

DETROIT, MI

June 24\textsuperscript{th} (Sunday) – Evening reception
June 25\textsuperscript{th} (Monday) –
  Ford and General Motors Visit (daytime)
  Ex-Pats Reception (evening)
June 26\textsuperscript{th} (Tuesday) – Toyota Engineering

SAN FRANCISCO, CA

June 27\textsuperscript{th} (Wednesday) – Travel to West Coast
June 28\textsuperscript{th} (Thursday) - Tesla
Committed Attendees

- Futuris
- Air International
- Lumen
- CSIRO
- DC Ross
- CAP-XX
Q & A