



GF Automotive – Expand into higher margin businesses

Lightweight Solutions for E-Mobility

Josef Edbauer, Head of GF Automotive
Technology Day 2016

Do you remember – Tech Day 2013



2020



Volume
6 - 7 mill.
Casted Parts

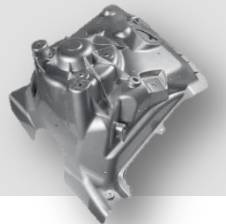
Won by GF
2.4 mill. Parts
~ 37% Market Share

First Global Order



2013

Volume
1.4 mill.
Casted Parts



2018

Volume
3 - 5 mill.
Casted Parts



Source: LMC Automotive; Europe Production; <http://www.volvocars.com/>



Expand into higher margin businesses

Weight Reduction

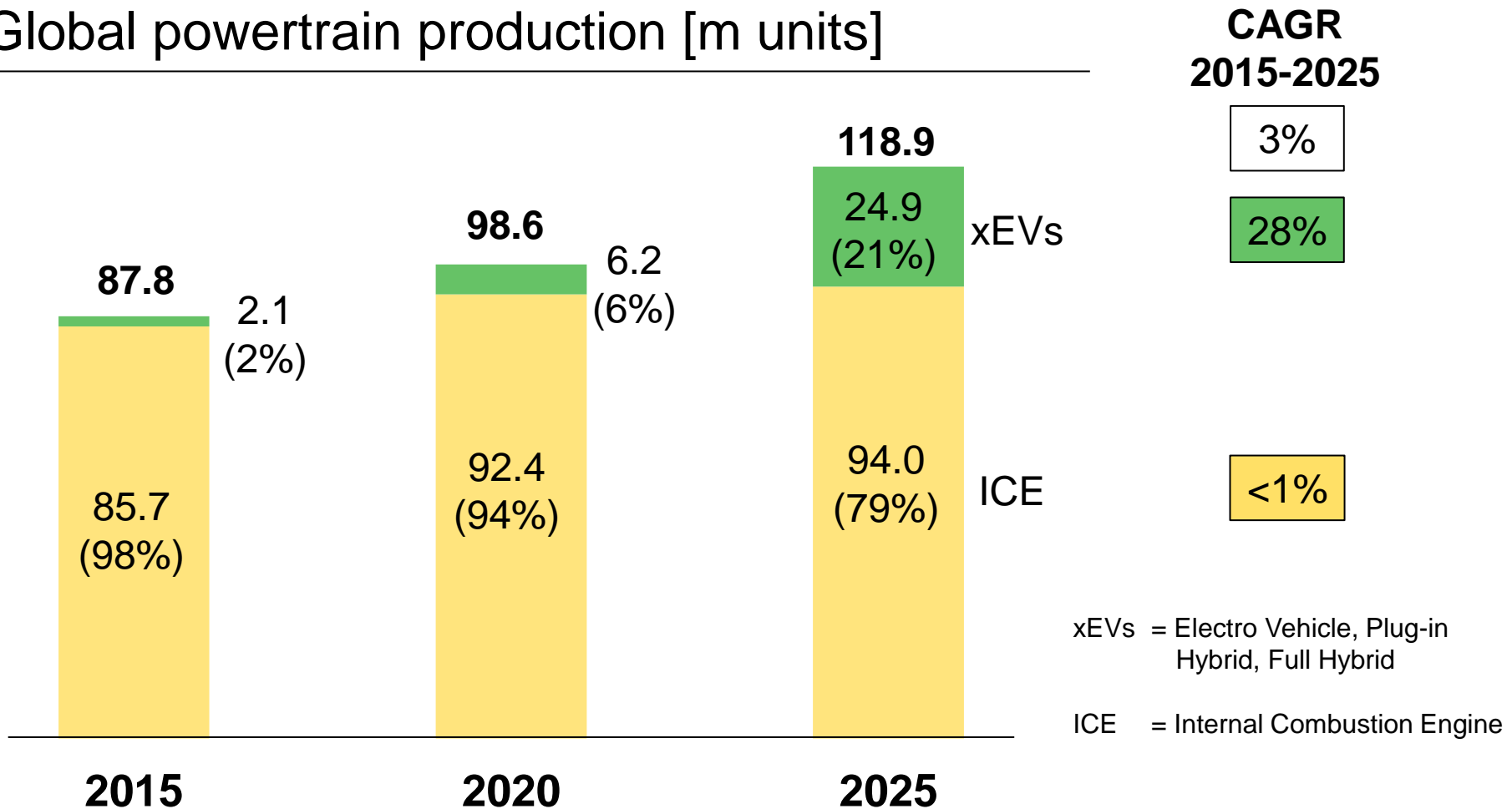
R&D Services

Functional Integration

Ready-to-mount Parts

E-Mobility with disproportionate growth ...

Global powertrain production [m units]

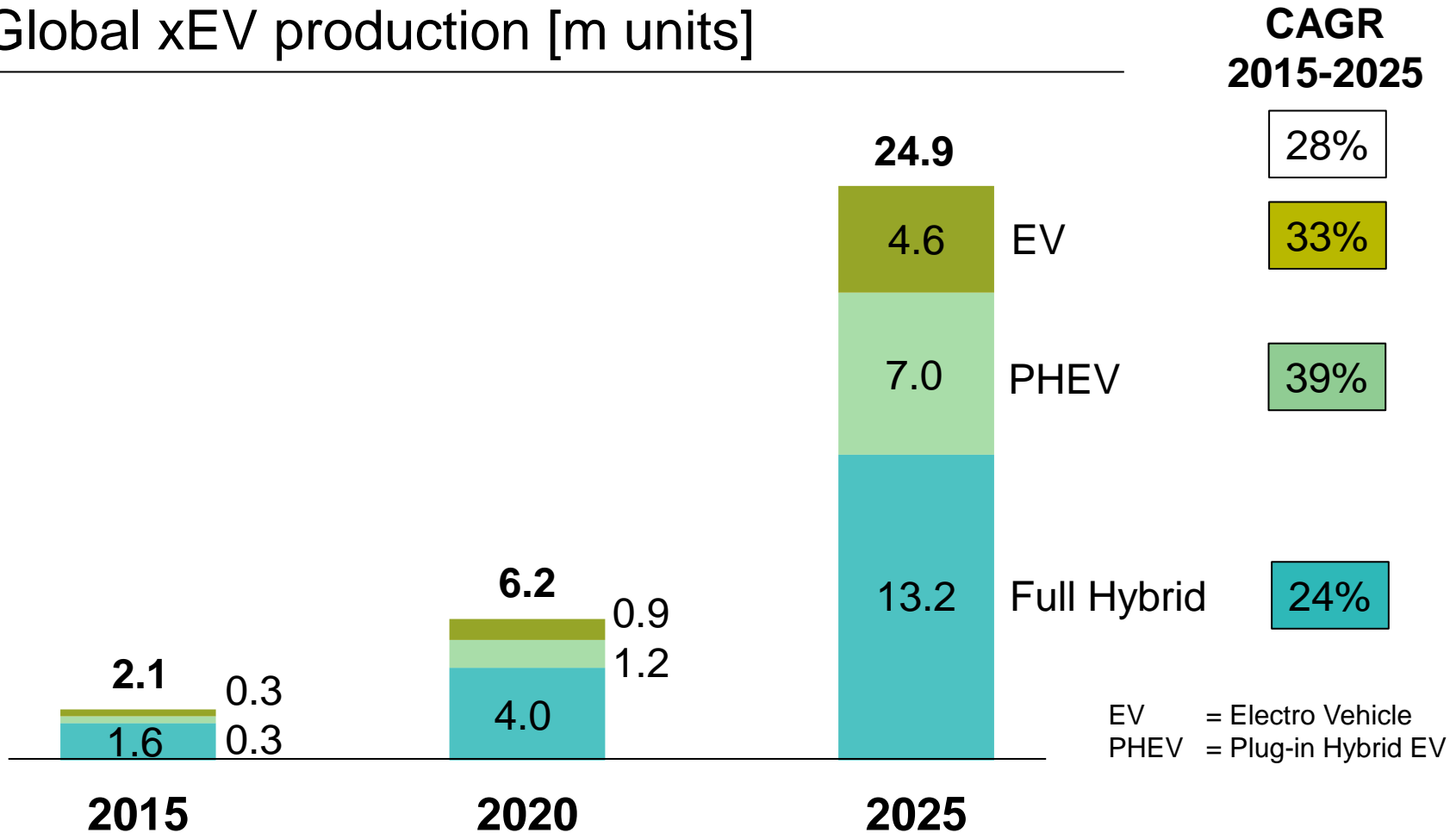


Source: Roland Berger

... in all relevant segments ...



Global xEV production [m units]



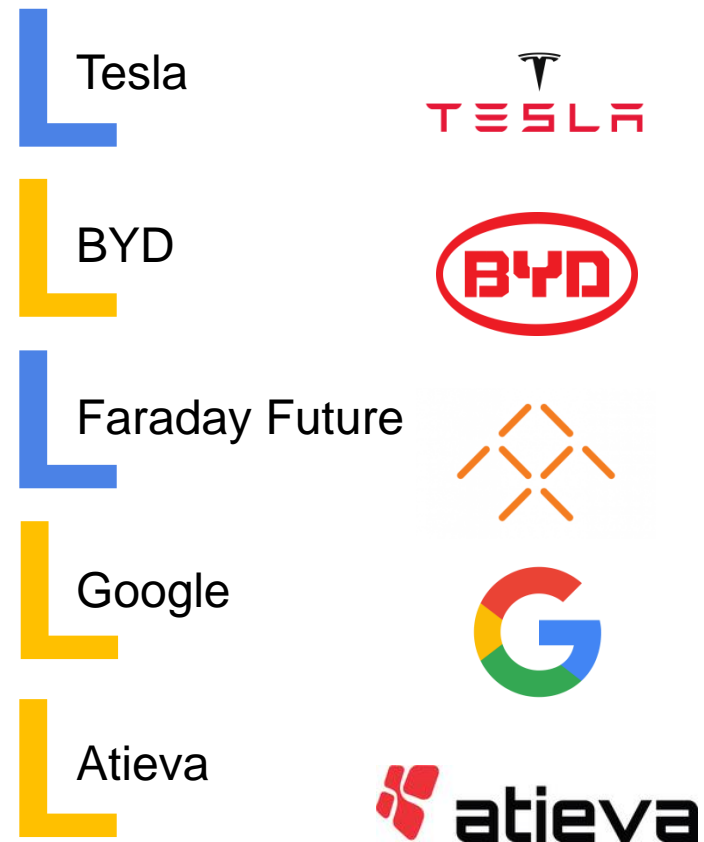
Source: Roland Berger

... with established customers and new entrants ...

GF Customers

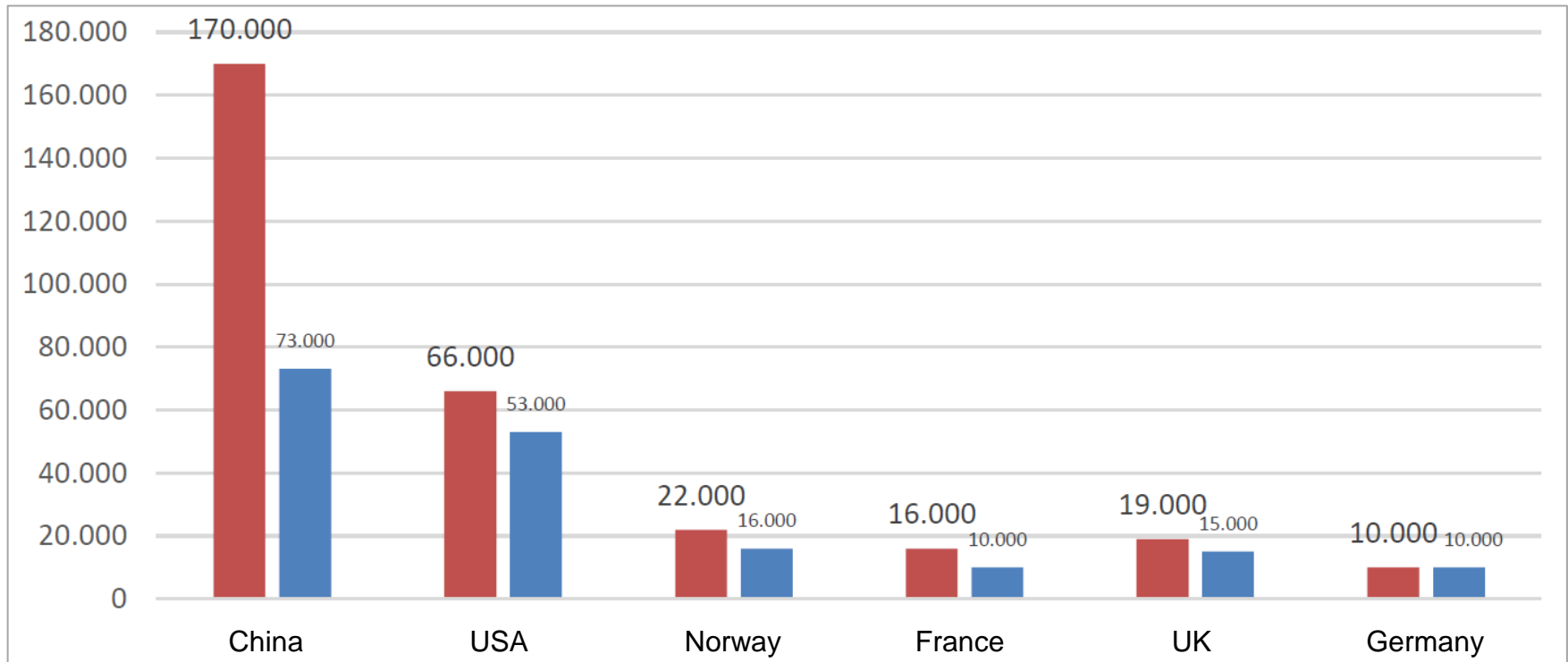


New Entrants



... especially in China

Sales trends in e-mobility (Battery Electric Vehicle/ Plug-In Hybrid) 1. HY2016 ■ / 1. HY2015 ■



Source: Center of Automotive Management

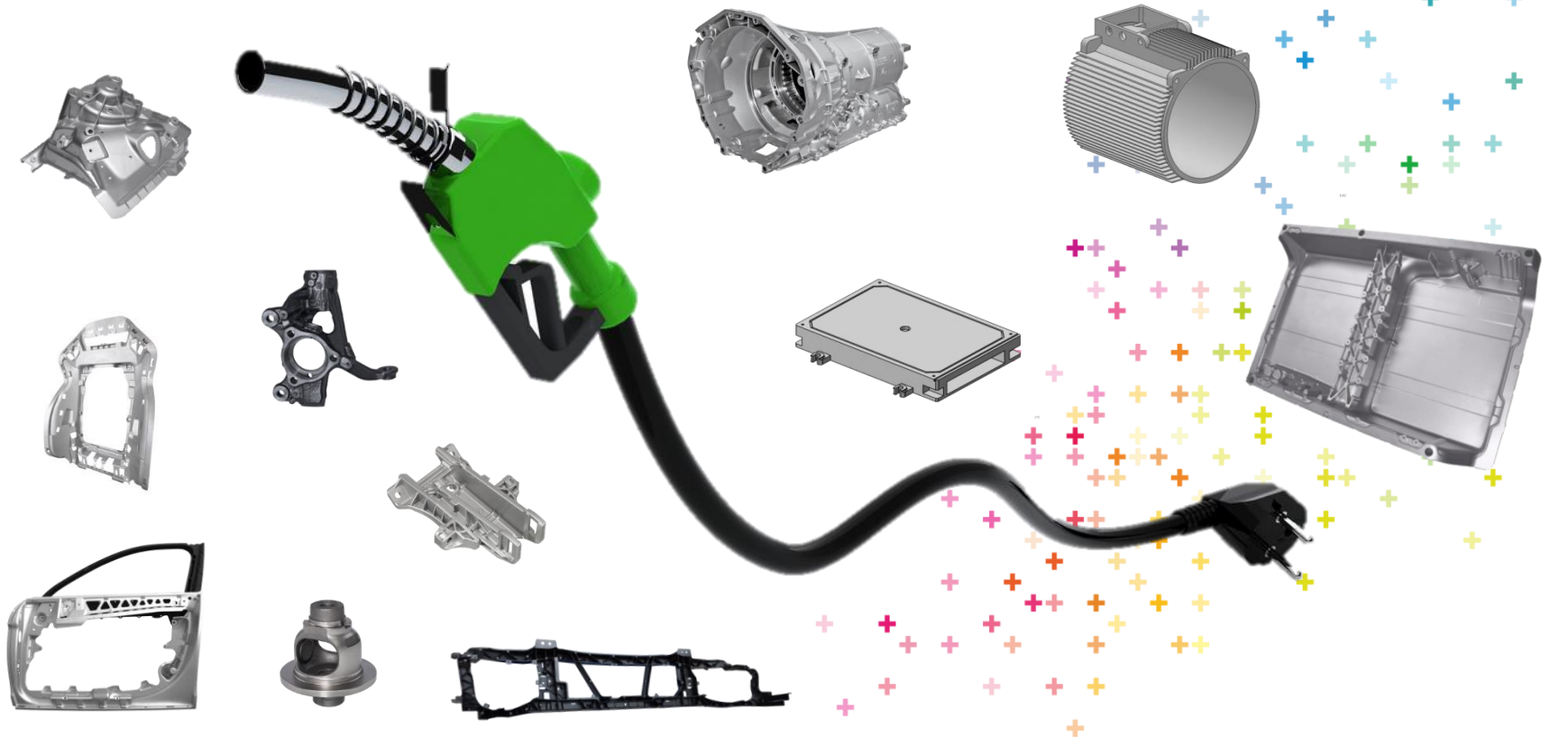
Local main players in China



We are specialized in lightweight components ...

Conventional components

Specific e-car components

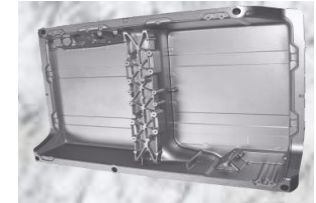
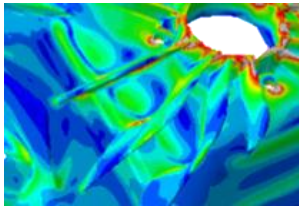


... even more important for e-mobility ...



Source: volkswagen.de

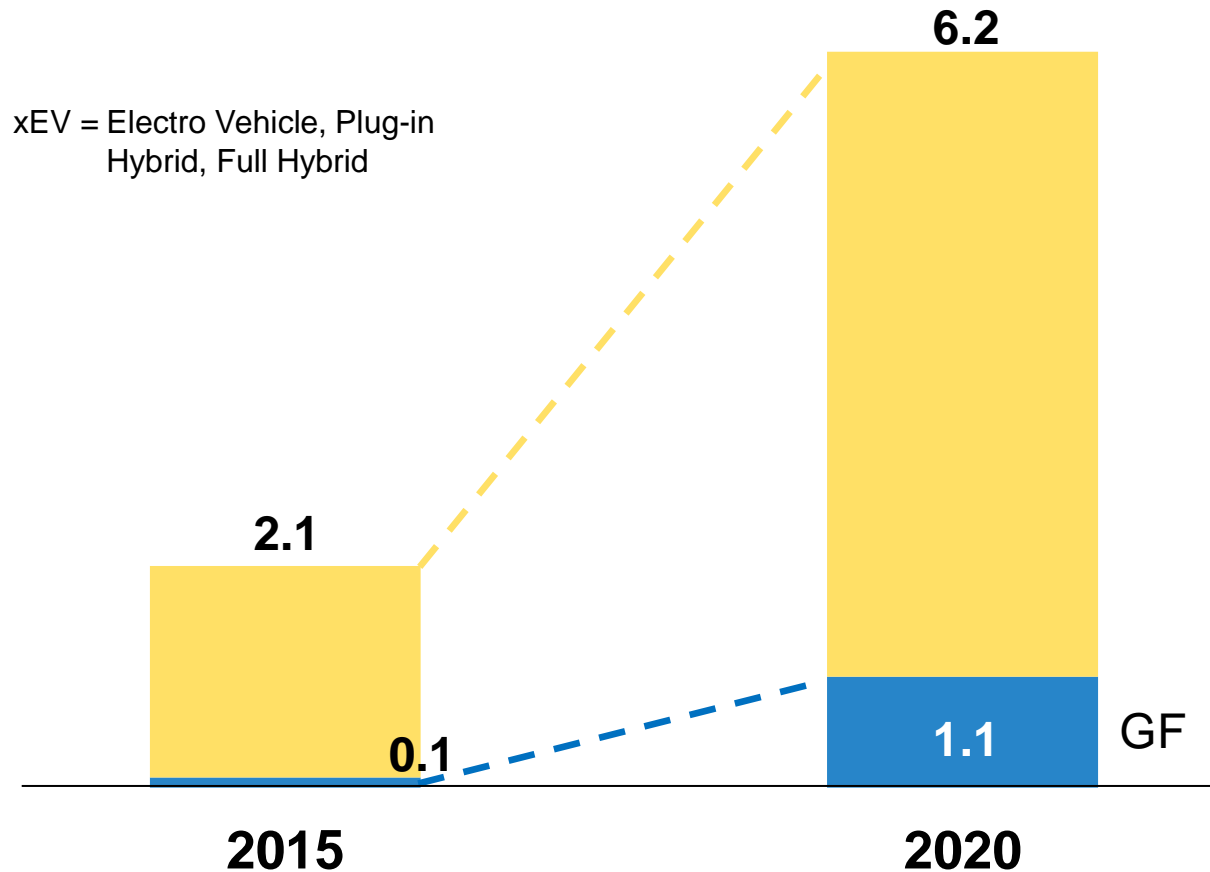
... and we master the whole value chain



Great opportunity for profitable growth



Market share xEV vehicles [m units]



**CAGR
2015-2020**

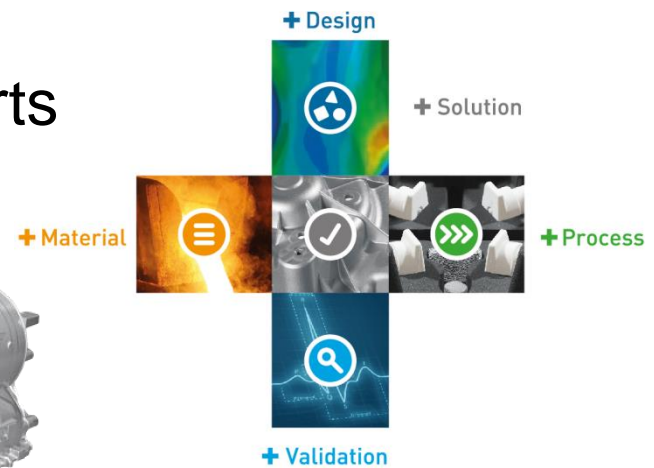
24 %

62 %

Source: Roland Berger / GF Sales Estimations

E-Mobility – An attractive business opportunity:

- **Weight Reduction** even more important
- **R&D Services** required especially for new entrants
- **Functional Integration** of complex parts
- **Ready-to-mount-Components** required





Passion for your Lighter Future



Lightweight Solutions for E-Mobility

Achim Schneider,
Head of Business Development & Sales



Roger Kupferschmid
Head of Product Management & Development