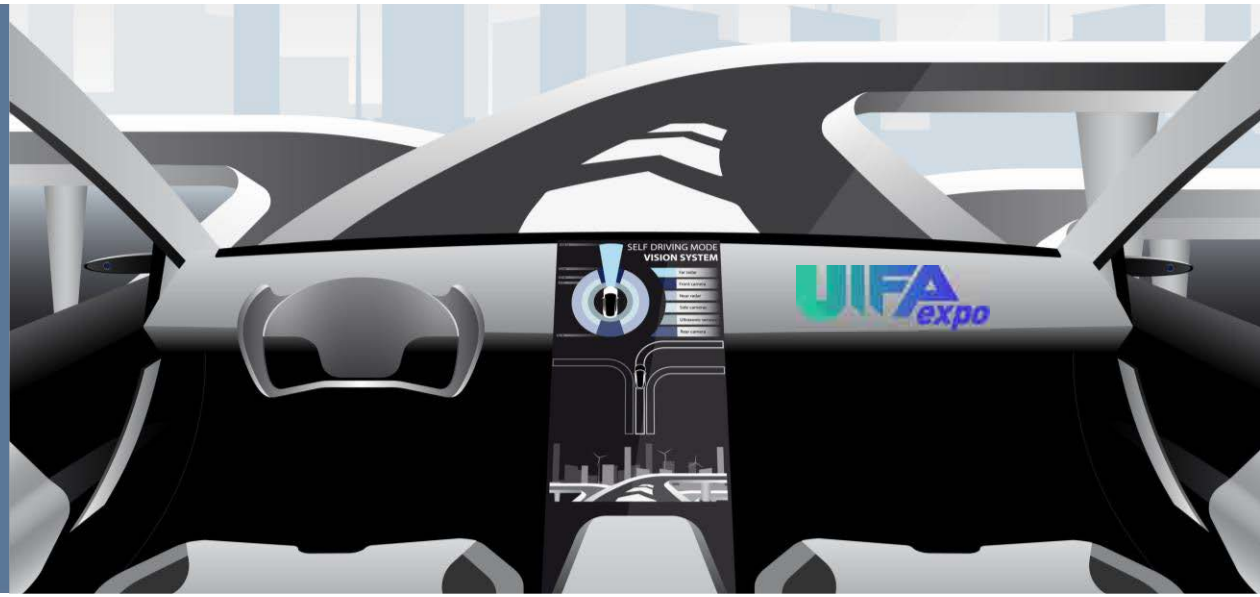
The German Automotive Industry

Aspects of the future car manufacturing and mobility

Presentation of Important Trends & Market Developments



DTO
B2B Research & Strategies

DTO Consulting GmbH

About us

Number of employees: 35
Founding year: 2008

Expertise

Over 500 successfully accomplished projects in more than 80 countries worldwide.

Project approach

Develop customized product, market and corporate strategies based on internal/external market and company information.

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1. Market Trends of the Future German Automotive Industry

Trend Topics in the Automotive Sector

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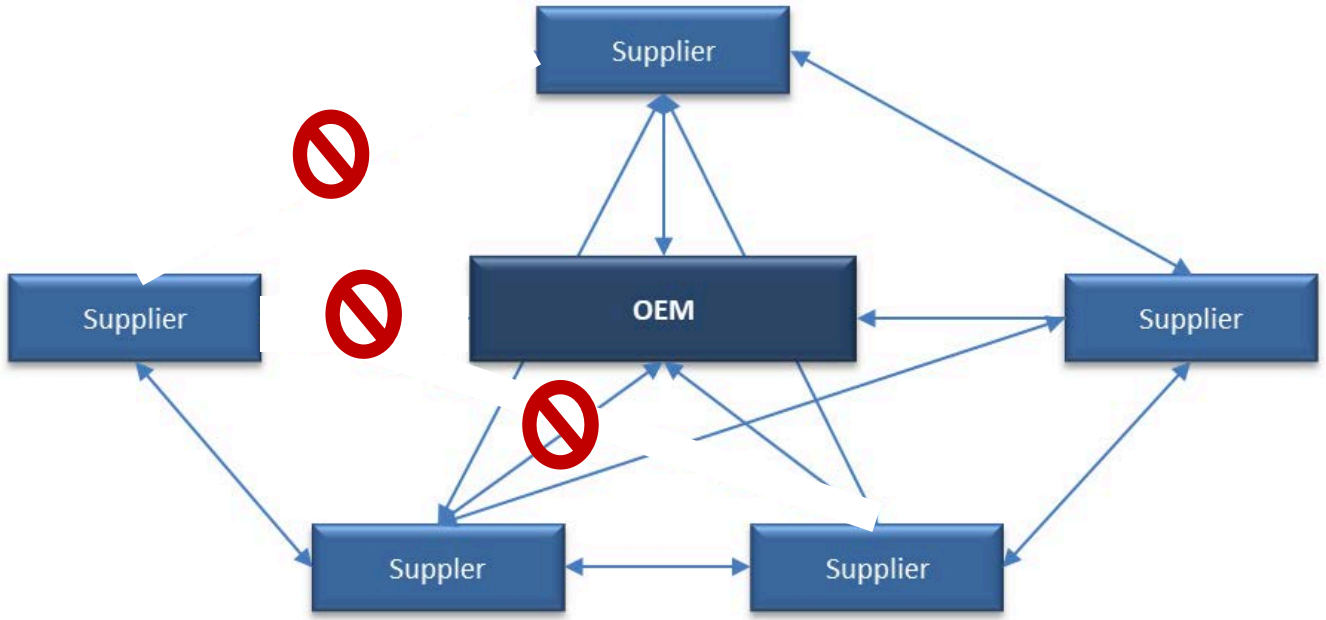
1. Market Trends of the Future German Automotive Industry

Supply Chain Disruption



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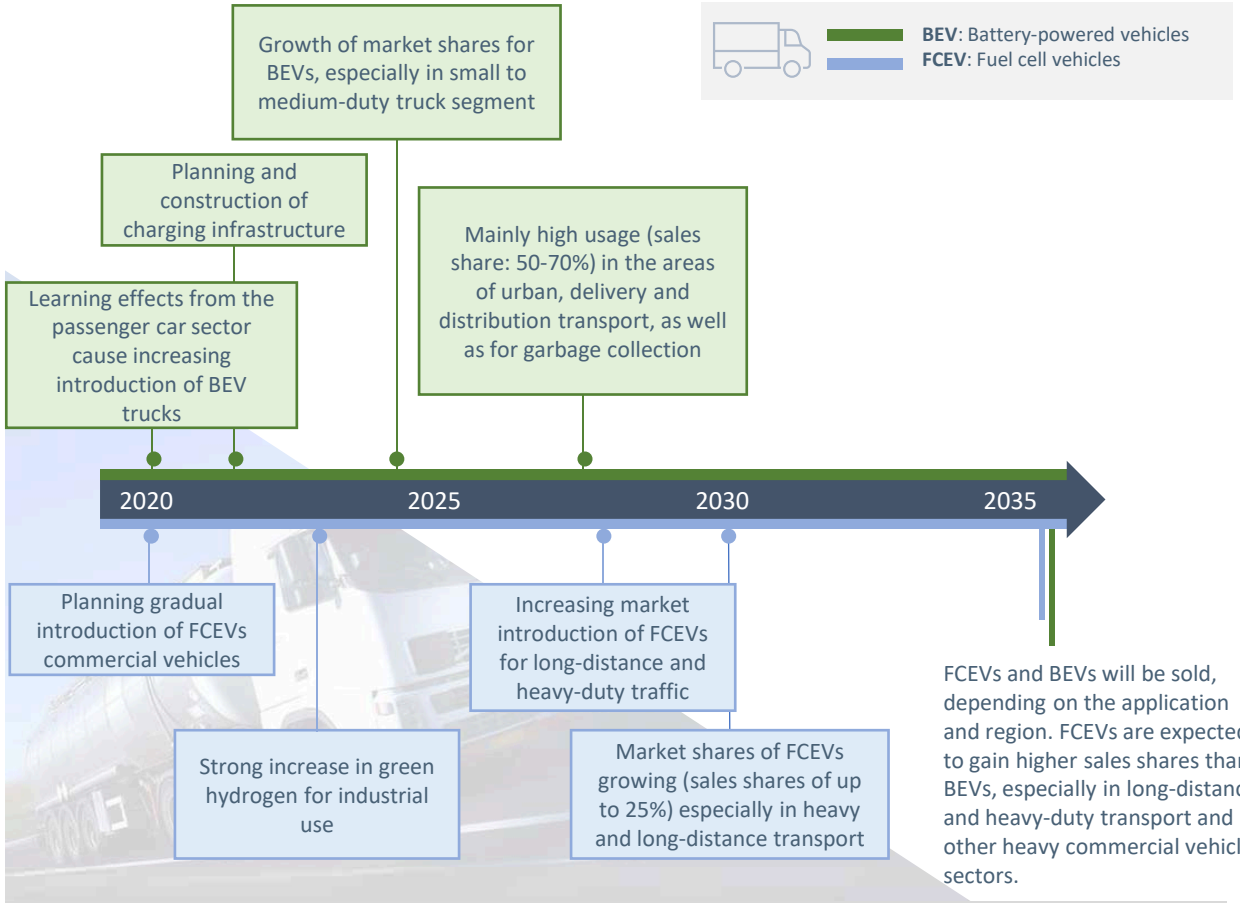
1. Market Trends of the Future German Automotive Industry

Alternative Drive Concepts
Batteries or fuel cells for trucks

DEVELOPMENT FORECAST* TRUCK DRIVES IN THE BEV AND FCEV SECTOR



Source: Content DTO (2022) **DTO, 2022 (Simplified representation)*

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1. Market Trends of the Future German Automotive Industry

Alternative Drive Concepts
Batteries or fuel cells for trucks

CURRENT PLANS OF TRUCK MANUFACTURERS*

DAIMLER TRUCKS

- 2021 Start of series production of the battery-powered eActros.
- However, Daimler is also pursuing a technology strategy that is open to the alternative drive type. The only thing that is certain is that only vehicles with alternative drive systems will be sold from 2040.
- From 2027, Daimler Trucks would like to offer FCEVs in series production.
- Daimler is working in a consortium with MAN, among others, in which cryo-compressed hydrogen, which has a particularly high density, can be stored in a tank. This can be used to cover distances of up to 1,000 kilometers without refueling.
- Daimler Truck has signed a cooperation agreement with TotalEnergies for the development of a hydrogen infrastructure.
- Daimler Truck North America, NextEra Energy Resources, and Blackrock have decided to set up a charging network for BEVs in North America starting in 2023; the expansion of hydrogen filling stations is also to be expanded with a slight delay.

RENAULT TRUCKS

- From 2020, models from over 3 to 26 tons will be offered as BEVs.
- From 2023, a fully electric model series will be offered for each market segment.
- Cooperation with Volvo, e.g. in battery recycling.
- FCEVs for long-distance transport to be launched between 2025 and 2030.

VOLVO TRUCKS

- Production of the FH Electric, a 40-ton truck with a range of over 300 kilometers, will start in the second half of 2022.
- VOLVO and Daimler have set up a joint venture called cellcentric in which they intend to focus on the production of fuel cells. Series production is scheduled to begin in Europe in 2025.
- VOLVO, Daimler, Iveco, Shell and OMV are also working on the production and marketing of hydrogen.

Source: Content DTO (2022) *(Excerpt)*

1. Market Trends of the Future German Automotive Industry

Alternative Drive Concepts
Electric & Hydrogen Mobility & Autonomous Driving

TIER 1 SUPPLIER DEVELOPMENTS*

Robert Bosch GmbH

Electric & Hydrogen Mobility

BENTELER makes it happen

POWERCELL

Autonomous Driving

ZF Friedrichshafen AG

Electric & Hydrogen Mobility

ALEXANDER DENNIS

Autonomous Driving

ibeo automotive

Source: Content DTO (2021, 2022) *(Excerpt)*

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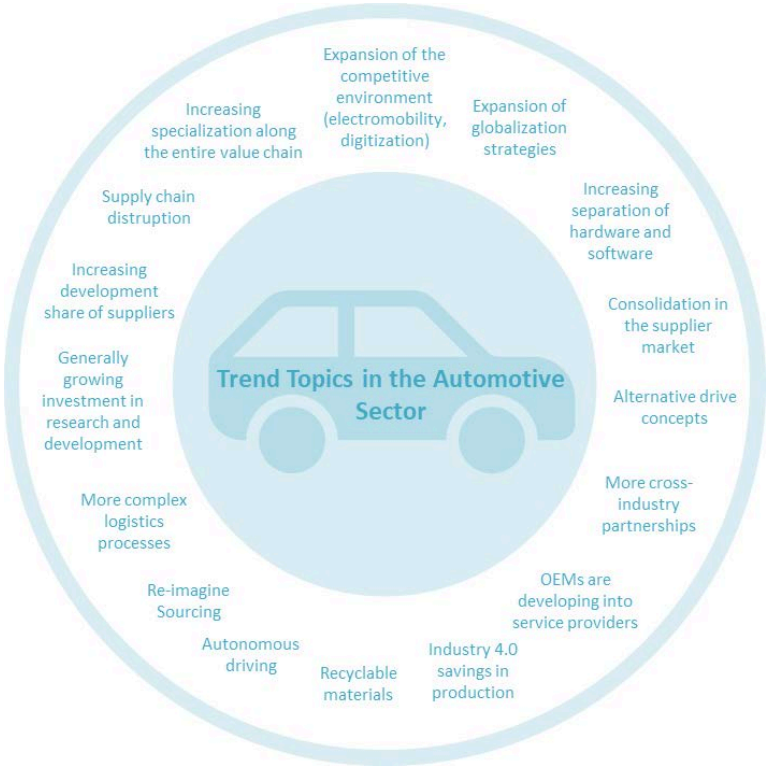
Strategic Alignment to Germany’s Future Automotive Market



Adaptation

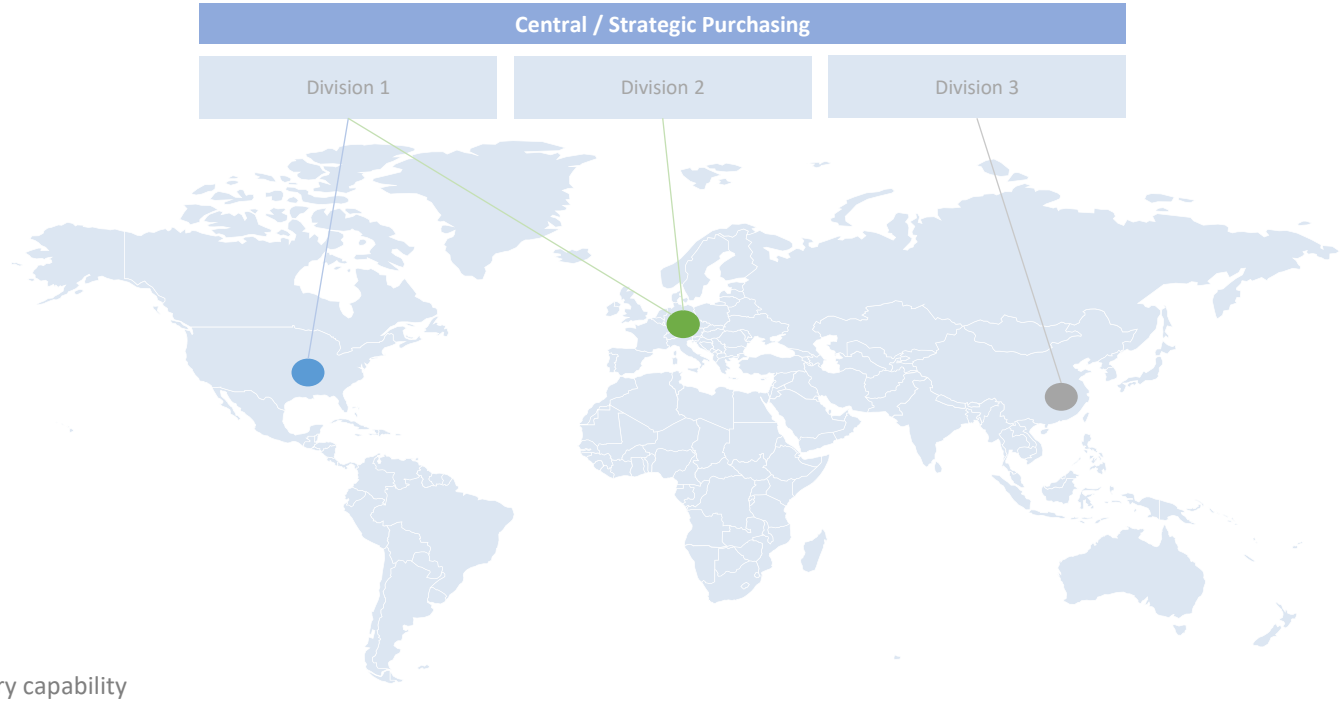
Investments in areas of know-how (specialization)

Increase spectrum of solution concepts & reduce complexity

Set USPs in areas of new technologies

2. Entering the German Automotive Market

Purchasing



Frequently asked requirements for suppliers:

- Structural and logistical focus on global delivery capability
- Willingness to reduce costs, as well as to increase productivity
- High competitiveness in terms of price, quality and innovative strength, adherence to deadlines and flexibility
- Zero-defect principle for all deliveries
- A digital information exchange adapted to the company
- Consideration of social responsibility as well as economic and ecological action in terms of sustainability

2. Entering the German Automotive Market

Opportunities for Cooperation and Recommendations for Action

Market Entry Support

Will you be part of Germany's *future* automotive market?

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Send your questions to:

Sophia Dietsch – Senior Project Manager

Telephone: +49 211 / 179 660-25
E-Mail: sophia.dietsch@dto-research.de
Website: www.dto-research.com

Come visit our stand at the UIFA expo

Contact

DTO
B2B Research & Strategies

Headquarters
Düsseldorf

Benrather Schloßallee 33
40597 Düsseldorf
Germany
Phone: +49 (0)211 17966 00
E-Mail: info@dto-research.de

Branch Office
Paris

21 Boulevard Haussmann
75009 Paris
France
Phone: +33 1 56 03 65 45
E-Mail: info@dto-research.com

Branch Office
Tallinn

Laeva 2
Tallinn 10111
Estonia
Phone: +372 5069 137
E-Mail: info@dto-research.com

Branch Office
Singapore

German Centre for Industry and Trade
25 International Business Park Rd
Singapore 609916
Phone: +65 8423 9380
E-Mail: info@dto-research.com