

Overview European Auto Industry



€ 16.8 billion sales

72,643 employees

122 production companies

650 service partners

Overview European Auto Industry



ZF Friedrichshafen AG Shareholders: 93.8% Zeppelin Foundation and 6.2% Dr. Jürgen and Irmgard Ulderup Foundation



	Car Powertrain Technology	Car Chassis Technology	Commercial Vehicle Technology	Industrial Technology	Steering Systems*
CEO Corporate Market Corporate R&D	Automatic Transmissions	Chassis Systems Chassis Components	Truck & Van Driveline Technology	Off-Highway Systems Test Systems	Passenger Car Steering Systems Commercial Vehicle Steering Systems
Corporate Finance, IT, M&A	Manual Transmissions/ Dual Clutch Transmissions	Rubber & Plastics Suspension Technology	Axle & Transmission Systems for Buses & Coaches	Special Driveline Technology	Passenger Car Steering Columns
Corporate Human Resources Corporate Governance	Axle Drives Powertrain Modules Die Casting Technology		CV Chassis Modules CV Damper Technology CV Powertrain Modules	Marine Propulsion Systems Aviation Technology Wind Power Technology	Global Aftermarket
Corporate Production					
Corporate Materials Management					
Corporate Quality					
Electronic Systems					
ZF Services					

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Board of Management...



Rolf Lutz

born in Tübingen,
Baden-Württemberg,
in 1952
Corporate Quality,
Commercial Vehicle
Technology,
South America

Wilhelm Rehm

born in Heidenheim
a. d. Brenz,
Baden-Württemberg,
in 1958
Corporate Materials
Management,
Industrial Technology

Dr. Konstantin Sauer

born in Heilbronn,
Baden-Württemberg,
in 1959
Corporate Finance, IT,
M&A, North America

Dr. Stefan Sommer

Chief Executive Officer
born in Münster,
North Rhine-Westphalia,
in 1963
Corporate Market,
Corporate Research and
Development, ZF Services,
Steering Systems

Michael Hankel

born in Bad Wildungen,
Hesse,
in 1957
Corporate Production,
Car Powertrain Technology,
Car Chassis Technology,
Electronic Systems

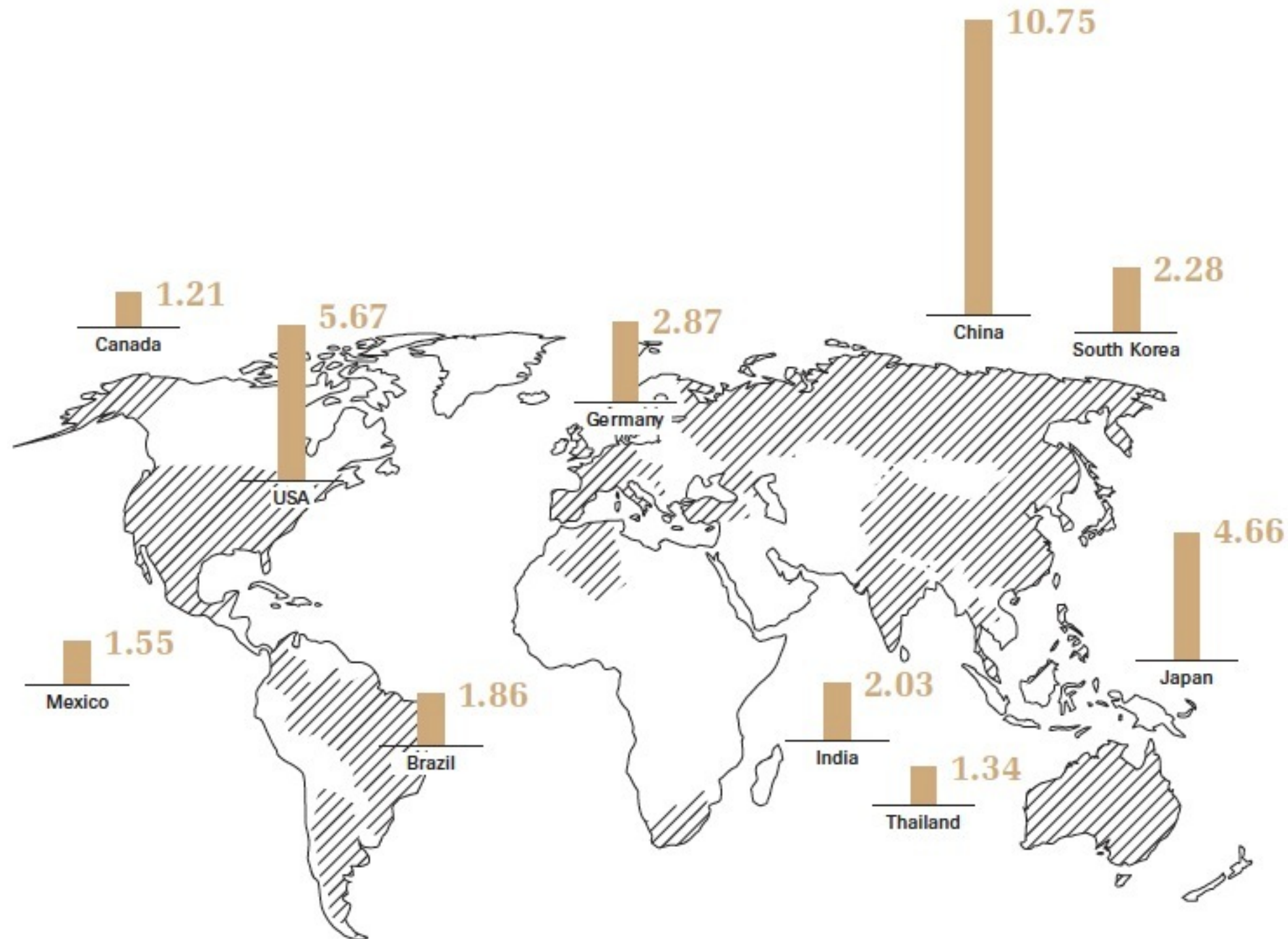
Jürgen Holeksa

born in Dinslaken,
North Rhine-Westphalia,
in 1965
Corporate Human Resources,
Corporate Governance,
Service Companies,
Asia-Pacific

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Worldwide Presence



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Motion & Mobility...



Car Powertrain
Technology

Car Chassis
Technology

Commercial Vehicle
Technology

Industrial
Technology

Steering Systems

ZF Lenksysteme GmbH ist ein Gemeinschaftsunternehmen der ZF Friedrichshafen AG und der Robert Bosch GmbH. ZF Lenksysteme GmbH is a joint venture of ZF Friedrichshafen AG and Robert Bosch GmbH.



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Powertrain technology...



2,4 million automatic car transmissions



5,7 million car clutches

2,0 million axle drives

4,4 million torque converters

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Chassis technology...



610 Mio. Pkw-Fahrwerkkomponenten
million car chassis components



53,8 Mio. Pkw-Dämpfer
million car dampers

3,7 Mio. Pkw-Achssysteme
million car axle systems

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Commercial vehicle technology...



10,4 Mio. Nkw-Fahrwerkkomponenten
million CV chassis components

10,1 Mio. Nkw-Dämpfer
million CV dampers



521.000 Nkw-Getriebe
CV transmissions

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And more...



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SCHAEFFLER



FAG



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SCHAEFFLER



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Overview European Auto Industry



SCHAEFFLER



Engine systems

Rolling bearing solutions, products for belt and chain drives, valve train components, and systems for variable valve trains



Transmission systems

Torsion and vibration dampers, clutches and double clutch systems, torque converters, CVT components, lightweight differentials, bearing solutions, synchronizing and gearshift components



Chassis systems

Wheel bearings, bearing solutions, steering components, and electro-mechanical actuators for roll stabilizers and power-assisted steering systems



eMobility Systems Division

Our various activities in the field of electric mobility are bundled in the eMobility Systems Division.

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SCHAEFFLER



Linear technology

Ball and roller bearing and guideway assemblies, hydrostatic linear guidance systems, and complete systems



Direct drives

Rotary and linear direct drives, including electronic sub-assemblies



Maintenance

Products and services for mounting, maintenance, and condition monitoring



Mechatronics

Bearings with integrated additional functions, e.g. using sensors or generators

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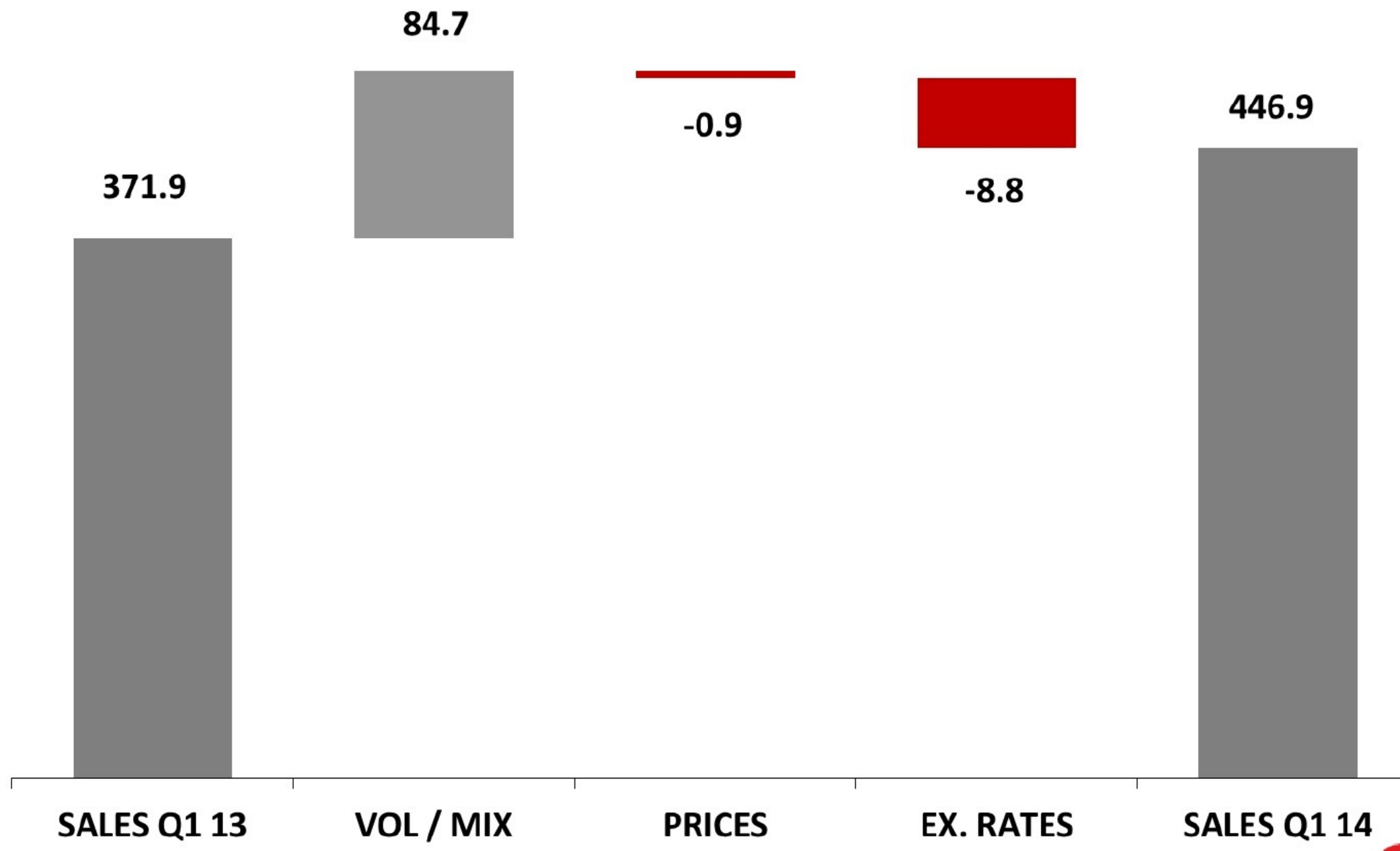


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(euro million)	2008	2009	2010	2011	2012	2013	% 13/12
Sales of goods and services	1,060.8	825.9	1,075.3	1,254.5	1,388.6	1.566,1	12.8%
Gross operating profit % on sales	140.9 13.3%	101.2 12.3%	130.5 12.1%	148.8 11.9%	171.7 12.4%	212,1 13.5%	23.5%
Net operating profit % on sales	74.8 7.0%	22.6 2.7%	56.4 5.2%	73.4 5.8%	89.5 6.4%	121.4 7.8%	35.6%
Profit before taxes on sales %	53.6 5.1%	10.7 1.3%	45.4 4.2%	54.7 4.4%	82.9 6.0%	104.4 6.7%	26.0%
Net profit % on sales	37.5 3.5%	10.5 1.3%	32.3 3.0%	42.9 3.4%	77.8 5.6%	89.0 5.7%	14.4%

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NTN



Usines / Plants

- a - Annecy (France)
- Argonay (France)
- Seynod (France)
- Meythet (France)
- Cran Gevrier (France)
- b - Le Mans (France)
- c - Alès (France)
- d - Turin (Italie / Italy)
- e - Bielefeld (Allemagne / Germany)
- f - Mettmann (Allemagne / Germany)
- g - Sibiu (Roumanie / Romania)



Centres logistiques Logistic centers

- 1 - Haguenau (France)
- 2 - St Vulbas (France)
- 3 - Cran Gevrier (France)
- 4 - Erkrath (Allemagne / Germany)
- 5 - Bielefeld (Allemagne / Germany)
- 6 - Lichfield (UK)
- 7 - Casablanca (Maroc / Morocco)



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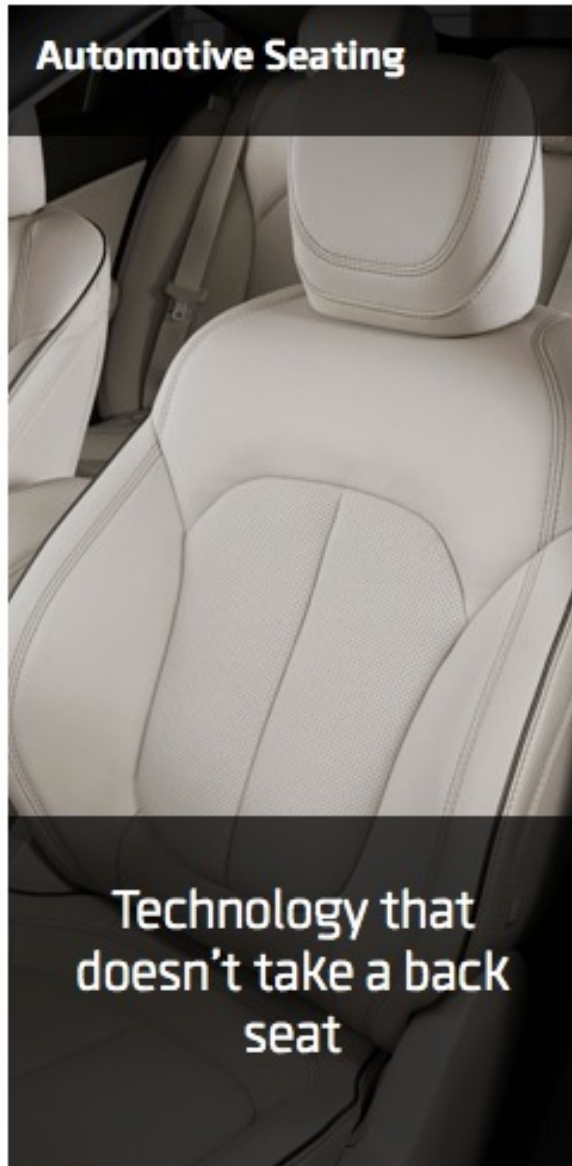
Faurecia is now present in 34 countries around the world, with about 320 production sites and R&D centers. Through these operational facilities on the doorstep of the world's main automotive markets, the Group has established a position as the preferred partner of a wide array of automakers with an increasingly global outlook in their business operations.



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Automotive Seating



Technology that
doesn't take a back
seat

Interior Systems



Leather, wood,
aluminum... A
thousand ways to
customize car interior

Emissions Control Technologies



We put our
technological
expertise to work for
the environment

Automotive Exteriors



Weight-reducing
innovations that don't
take safety lightly!

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Despite a challenging economic environment in certain regions, the Group reported sales of 12.1 billion euros in 2013, an increase of 9% ⁽¹⁾ compared with 2012, and once again recorded a very high order intake, totaling 14.8 billion euros.

⁽¹⁾ Like for like (constant Group structure and exchange rates).

€12,110
MILLION
IN SALES IN 2013

BREAKDOWN OF ORIGINAL EQUIPMENT SALES BY DESTINATION

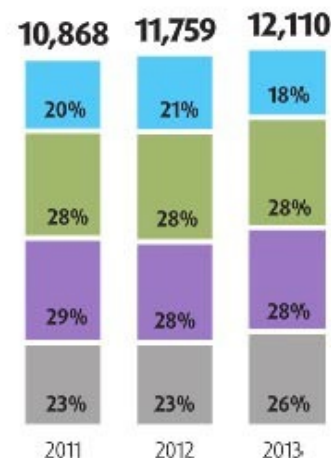
in millions of euros and as a % of sales



■ Europe
■ Asia
■ North America
■ South America

SALES BY BUSINESS GROUP

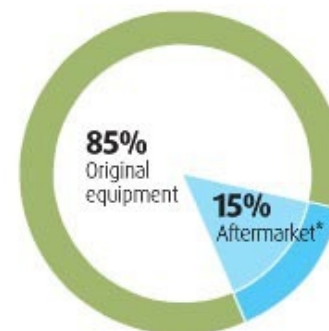
in millions of euros and as a % of sales



■ Comfort & Driving Assistance Systems
■ Powertrain Systems
■ Thermal Systems
■ Visibility Systems

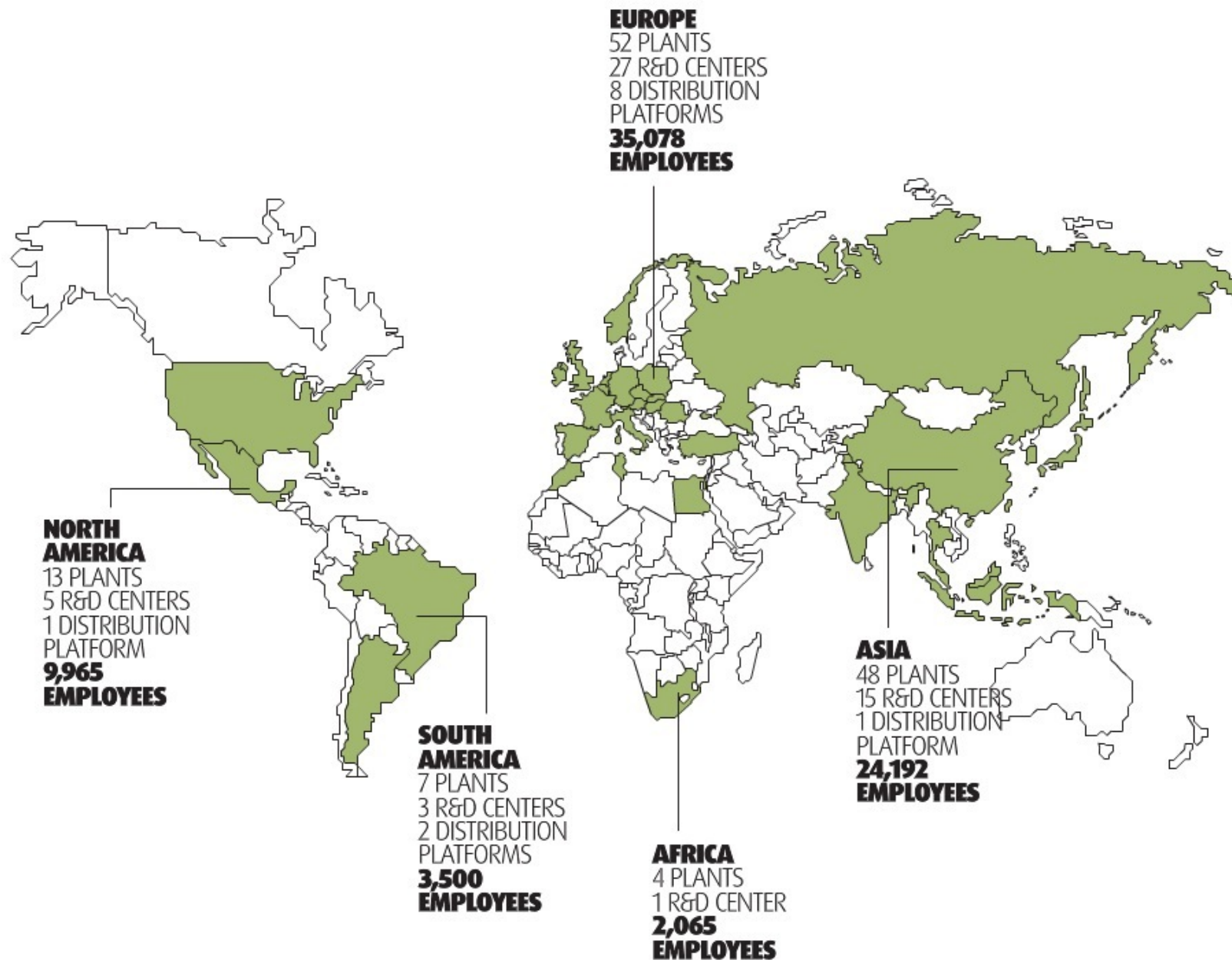
SALES BY MARKET

as a % of sales



* Including miscellaneous sales and tooling.

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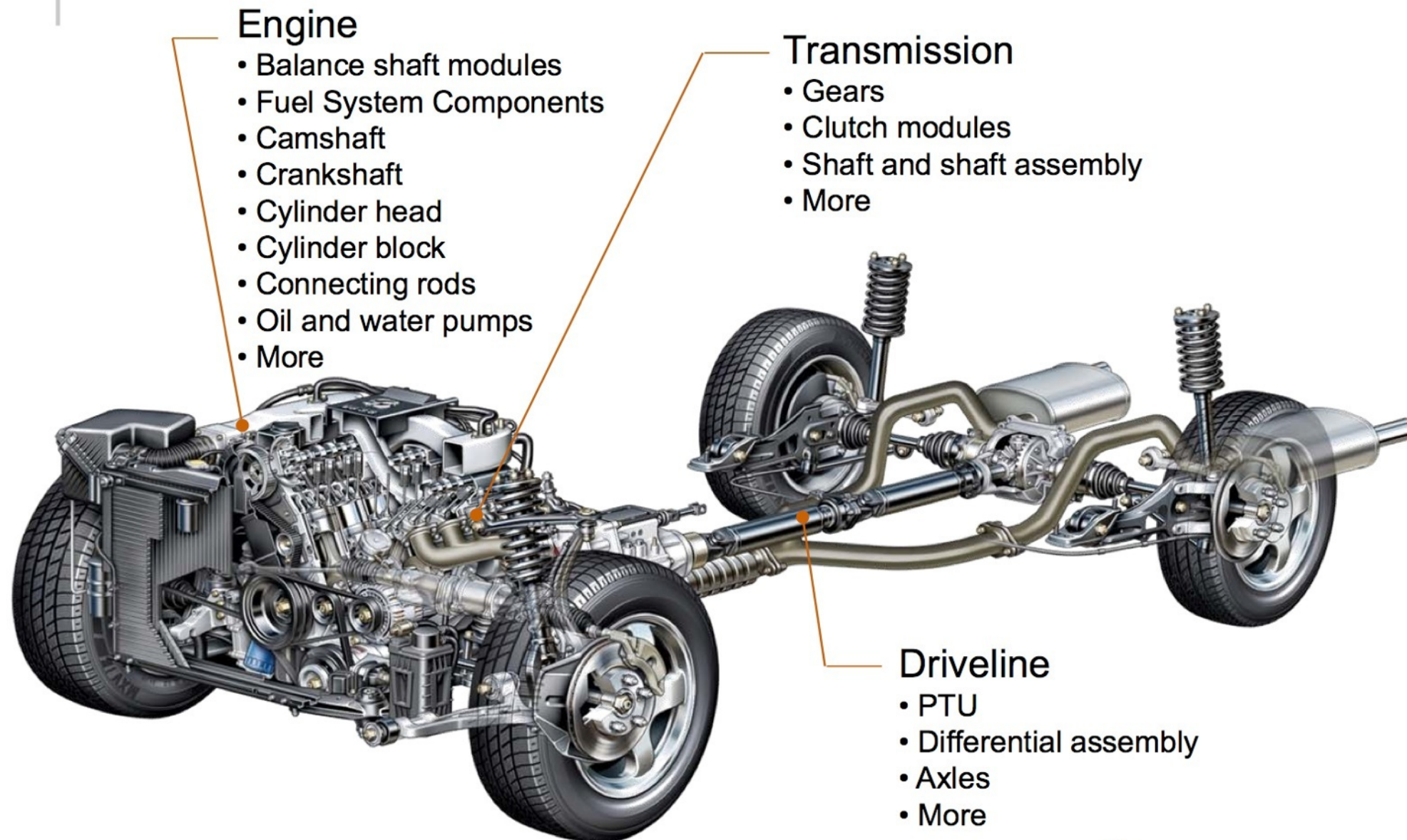
LINAMAR

Power to Perform

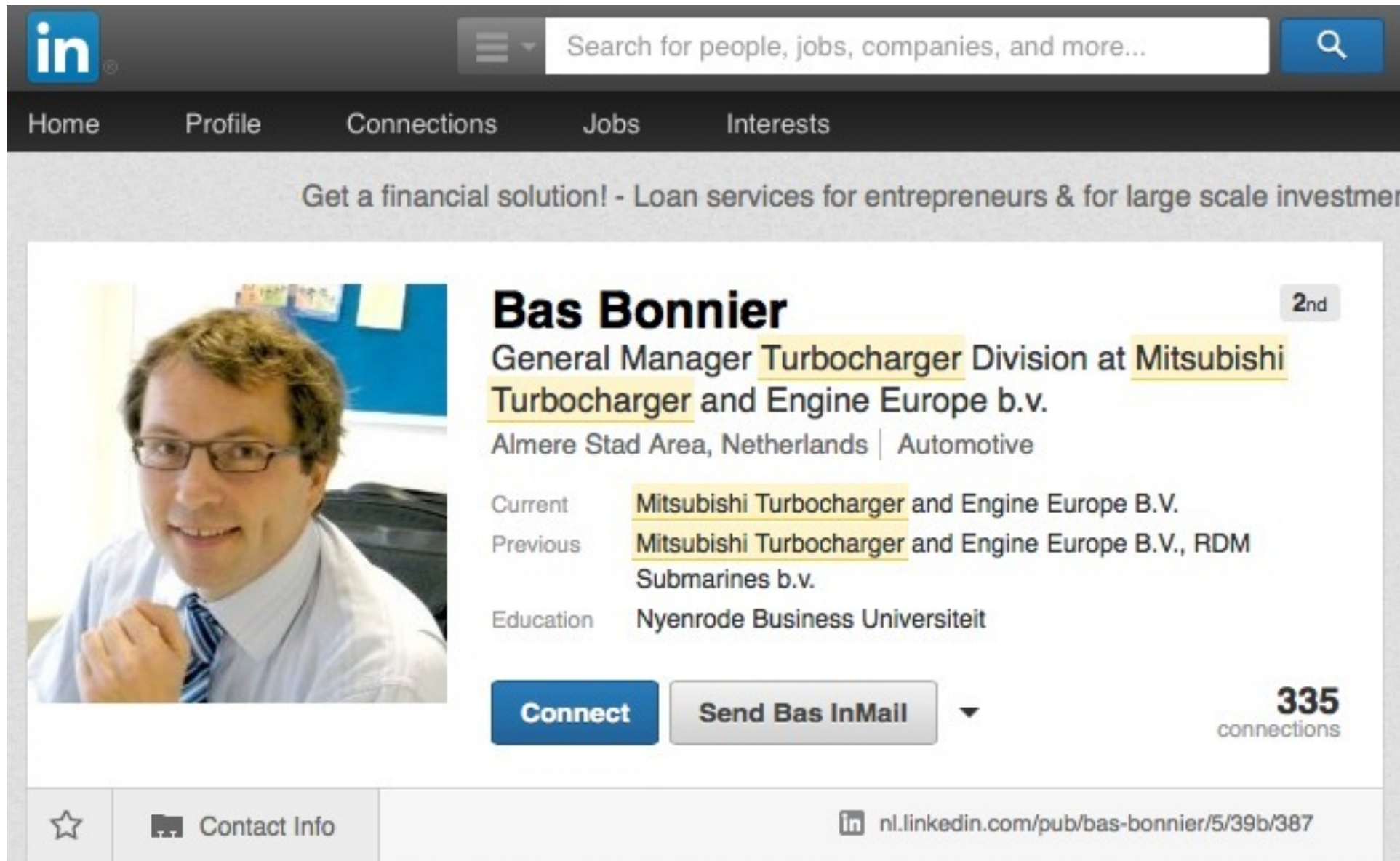
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Powertrain Capabilities



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This block contains a screenshot of a LinkedIn profile for Bas Bonnier. The profile is displayed on a dark grey background with a white header. The header includes the LinkedIn logo, a search bar, and navigation links for Home, Profile, Connections, Jobs, and Interests. Below the header, there is a banner for a financial solution. The profile itself features a profile picture of Bas Bonnier, a man with glasses and a white shirt. To the right of the picture, his name 'Bas Bonnier' is displayed, followed by his current position 'General Manager Turbocharger Division at Mitsubishi Turbocharger and Engine Europe b.v.' and his location 'Almere Stad Area, Netherlands | Automotive'. Below this, his current and previous employers are listed: 'Mitsubishi Turbocharger and Engine Europe B.V.' and 'Mitsubishi Turbocharger and Engine Europe B.V., RDM Submarines b.v.'. His education is listed as 'Nyenrode Business Universiteit'. At the bottom of the profile, there are buttons for 'Connect' and 'Send Bas InMail', and a connection count of '335 connections'. The footer of the profile includes a star icon, a 'Contact Info' button, and the URL 'nl.linkedin.com/pub/bas-bonnier/5/39b/387'.

in Search for people, jobs, companies, and more...

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Bas Bonnier 2nd

General Manager Turbocharger Division at Mitsubishi Turbocharger and Engine Europe b.v.

Almere Stad Area, Netherlands | Automotive

Current Mitsubishi Turbocharger and Engine Europe B.V.

Previous Mitsubishi Turbocharger and Engine Europe B.V., RDM Submarines b.v.

Education Nyenrode Business Universiteit

Connect Send Bas InMail

335 connections

Contact Info nl.linkedin.com/pub/bas-bonnier/5/39b/387

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Coming soon...



European Autobook 2014



ULI KAISER





Thank you very much!

Uli Kaiser, President
THAI EUROPEAN BUSINESS ASSOCIATION (TEBA)

ulikaiser@thaieuro.biz