

Asia 2015 6th - 8th of Jul

AUTOMOTIVE LIGHTWEIGHT

PROCUREMENT SYMPOSIUM

Jumeirah Himalayas Hotel in Shanghai, China



SYMPOSIUM FOCUS

- Aluminium
- Carbon Fibre
- Composites
- High Strength Steel
- Magnesium

HIGHLIGHTS

• INTERNATIONAL SPEAKERS

AUDI - MAGNA - DGS - GEELY - NOVELIS - JSC - VOESTALPINE, ...

• LIGHTWEIGHT TECHNOLOGY EXHIBITION

DGS - StrikoWestofen - Kurtz - Novelis – Idra

• SIMULTANEOUS INTERPRETING

Chinese - English / English - Chinese

ATTENDING COMPANIES



MEDIA & ORGANIZATION PARTNERS



Brings together the procurement and supply side of lightweight materials and their advanced processes in accompany with cost balance or reduction....

AluMag® offers the four following services - worldwide:



Market Research

- Aluminium Extrusion Customer Database
- Foundry & Tool Maker Database
- Automotive Application, Material & Process Analyses
- Various Industrial Application Research & Analyses

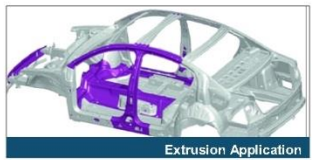
AluMag as your provider of automotive research and forecasting studies, offers you and your business, the market intelligence you need to realize the best strategic decisions



Material - Process - Application Trend Analysis

Large variety of market access, local & global:

- business database with 6,970+ companies and 18.700+ contacts
- 150+ satisfied customers worldwide
- Arranged 20+ roadshows/events since 2008



Extrusion Application

Your Benefits:

- Learn about your [potential] clients and competitors
- Obtain an inside view of the market
- Identify opportunities and threats
- Minimize risk and optimize profits
- Position your company successfully
- Based on data off the shelf, secondary re-search and interviews, AluMag generates validated researches



Market Development

- Analysis & Development of Market Opportunities
- Accelerate Market Penetration
- Manage New Product Launches
- Establish a Sales Force Sales on Demand

AluMag guides and supports your organization globally through the different market development phases until we have successfully launched, implemented or executed your project.



Map of activity - SAMPLES

Manage and integrate each aspect of your organization by initiating, planning, controlling, executing and closing out a new project. AluMag offers liaison management services as an addition to our customer's staff by bringing in the resources that define us.



JATCO Head Quarters Meeting in Japan

Your Benefits

- Analysis and development of Markets
- Realize opportunities
- Accelerate market penetration
- Establish a sales force
- Provide warehousing and distribution services
- Manage new product launches
- Sales on demand



Roadshows / Events

- Organization of Technical & Commercial Roadshows
- Oversea Commercial & Technical Events
- Host In-House Events & Presentation
- Common Technology Booth at Leading Exhibitions

AluMag roadshows, tech-meetings and symposia are the first class events used by exhibitors and guest as a unique benchmark platform.



Daimler Sindelfingen as Roadshow Location

The AluMag think tank events are bringing in decision makers and executives in EUROPE, ASIA and NAFTA.



G M VIP at AluMag Booth SAE in Detroit

Upcoming Events:

- 2015 Jul: Automotive Light-weight Procurement Symposium in Shanghai, China
- 2015 Nov: Automotive Light-weight Procurement Symposium in Detroit, USA
- 2016 April Common tech- booth at the SAE World Congress in Detroit, USA
- 2016 Jul: Automotive Light-weight Procurement Symposium in Shanghai, China



Strategic Localization

- Warehousing & Distribution Service
- Supplier & Tie-up Localization
- Identification & Trade-off of new Technology
- Foreign Market Business Cases and whose Realization

AluMag has the global expertise to search, identify, evaluate and validate potential strategic business opportunities for expansions and partnerships that will assist your business growth plans regionally and globally



On-Site Greenfield Planning Meeting

Services for:

- Search, develop and present potential acquisition candidates for regional and global business expansions
- Localization of new manufacturing / service sites for business expansions
- Identification of new technology supplier development related to products, processes and materials
- Search, develop and present potential business partners / suppliers to support regional and/or global supply programs
- Evaluate potential competitor profiles for new or existing business in non-presence geographies
- Evaluate new emerging technologies and processes for business expansions

Are you:

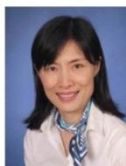
- looking for specific data, information and outlook about product, material, customer, supplier, technologies, ...
- want to discuss your project, increase sales, access new markets, ...
- interested to participate in one of our roadshows / events or organize your customized showcase ...
- looking to localize, expand into new markets, countries, tie-up targets, ...

please contact your AluMag Team to receive a quote or proposal

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Asia Automotive Lightweight Procurement Symposium
6th – 8th of July 2015
Jumeirah Himalayas Hotel in Shanghai, China.



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THE MARKET DEVELOPER

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Agenda

Agenda: (Is Continuously Being Updated)

Monday The 6th Of July – Jumeirah Himalayas Hotel, Shanghai – 6th Floor

06:00pm - 10:00pm

Pre-registration and Welcome Reception

Tuesday The 7th Of July – Jumeirah Himalayas Hotel, Shanghai – 6th Floor

08:30am – 09:15am

Registration & Morning Coffee / Tea

09:15am – 09:30am

Welcome:

Mr. Jost GAERTNER, Managing Partner at ALUMAG Automotive GmbH

09:30am – 10:25am

Opening Keynote:

Mr. Frank VENIER, Strategy and Innovation; Lightweight Design Centre at AUDI AG

Lightweighting SUV - The New Audi Q7 In Multimaterial Car Body Design

10:25am – 11:00am

Break for Refreshments/Coffee/Tea, Snacks, Networking, Tech Exhibition

11:00am – 12:00am

Paper 1 – Part 1:

Mr. Gerhard KRACHLER, Director Advanced Development & Product Strategy at MAGNA STEYR Engineering AG & Co.KG

Paper 1 – Part 2:

Mr. Christian JURICEK, Manager R&D Europe at COSMA MAGNA International

Magna's Global Advanced Lightweight Competences

12:00pm – 01:45pm

Break for Refreshments/Coffee/Tea, Lunch, Networking, Tech Exhibition

01:45pm – 02:25pm

Paper 2:

Mr. Andreas MUELLER, CEO at DGS Druckguss Systeme AG

Localization And Industrialization Of Cast Aluminium Structural Applications

02:30pm – 03:10pm

Paper 3:

Mr. Li WAN, Vice President at Guangdong Hongtu Technology (Holdings) Co Ltd

Aluminum Alloy High Vacuum Die Casting Technology And It's Application On Automotive Structural Parts

03:15pm – 03:45pm

Paper 4:

Mr. Lothar HARTMANN – Managing Director Foundry Machines & Trimming Presses at Kurtz GmbH

Mr. Michael BARTEL – Asia Sales Manager Foundry Machines & Trimming Presses – Kurtz GmbH

Low Pressure Casting

A traditional casting technology helping to step ahead for light weight solutions in engine block manufacturing

03:45pm – 04:15pm

Break for Refreshments/Coffee/Tea, Snacks, Networking, Tech Exhibition

04:15pm – 04:55pm

Paper 5:

Mr. Peter BERNSCHER, Member Of The Board & Director Automotive Body Parts at Voestalpine Metal Forming GmbH

Lightweight Solutions In The Automotive Industry By Voestalpine

05:00pm – 05:55pm

Closing Keynote:

Mr. Jochen SIEBERT, Managing Partner at JSC Automotive Consulting Co. Ltd.

Outlook And Hurdles Of The Chinese Economy And Automotive Industry

05:55pm – 06:00pm

Summary:

Ms. Ying ZHOU, Project Coordinator China – Japan at ALUMAG Automotive GmbH

06:00pm - 10:00pm

Reception Sponsored By StrikoWestofen

Dinner Speech – Part 1:

Mr. Rudolf RIEDEL – Group Managing Director at StrikoWestofen GmbH

Dinner Speech – Part 2:

Mr. Rainer ERDMANN – Managing Director Asia Operations at StrikoWestofen Thermal Equipment Co.Ltd

Profits With Light Metal Castings Start In The Melt Shop

Agenda

Agenda: (Is Continuously Being Updated)

Wednesday The 8th Of July

08:15am – 08:55am

Opening Keynote:

Prof. Fei XIONG Chief Engineer & Director of Auto Lightweight Department at GEELY

Automotive Lightweight Promoting The Application Of Aluminium

09:00am – 09:40am

Paper 1:

Mr. James LIU, Managing Director and Vice President of Asia Auto at NOVELIS China

High Volume Aluminum Solutions For Lightweighting

09:45am – 10:25am

Paper 2:

Dr. Jin HOU – General Manager – Sapa Technology Asia

High Performance Aluminium Alloys For Automotive Light-Weighting

10:25am – 11:00am

Break for Refreshments/Coffee/Tea, Snacks, Networking, Tech Exhibition

11:00am – 11:40am

Paper 3:

Mr. Yoshikazu MUKAI, Executive Vice President & Technical Specialist at Kobelco Automotive Aluminium Rolled Products (China) Co.,Ltd – Shanghai Branch

Kobe's R&D Activities For Automobile Lightweighting

11:45am – 12:25pm

Closing Keynote:

Mr. Martin SHI, Chief Editor at GASGOO International And Senior Analyst at GASGOO Research Institute

The Status And Development Trends Of China Automobile Lightweight

12:30pm – 12:35pm

Summary:

Mr. Jost GAERTNER, Managing Partner at ALUMAG Automotive GmbH

12:45pm – 01:00pm

Walk To The SNIEC Shanghai New International Expo Centre

01:00pm – 01:40pm

Reception With Snacks & Finger Food at the SNIEC

01:40pm – 05:30pm

Individual Or Guided Visit At The 2015 "Aluminium China " And "China Diecasting" Exhibitions

Backup Speech

Mr. Jost GAERTNER, Managing Partner at AluMag Automotive GmbH

Top 16 Global Ranking Of Aluminium And Magnesium Foundries By Revenue

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TITLE

Outlook And Hurdles Of The Chinese Economy And Automotive Industry

ABSTRACT

China has become one of the most important markets for the automotive industry with fast growth rates. However, the automotive market in China is now going into a phase of slow growth and decreasing margins as the economy is slowing. China needs to rebalance its economy from relying too much on investment to more consumption. Major challenges have to be overcome like the dependence on real estate and the high debt load of the companies and the local governments. China will become either be caught in the middle-income trap or become rich with tremendous implications for the automotive industry.



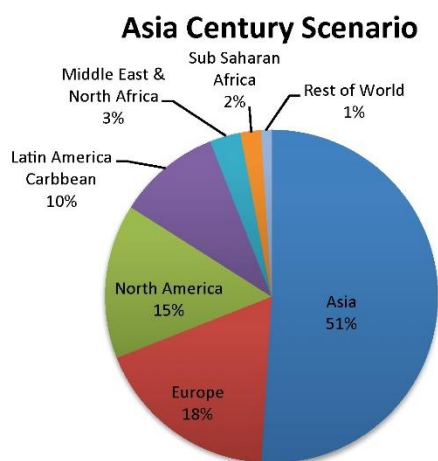
Outlook and Challenges for the Chinese Economy and Automotive Industry

July 2015

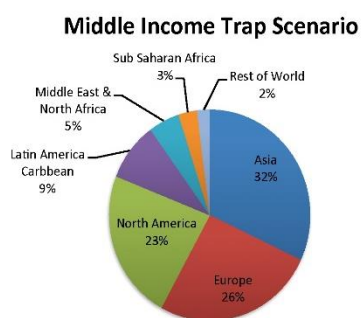
Alumag Symposium Shanghai

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Two scenarios for Asia 2050

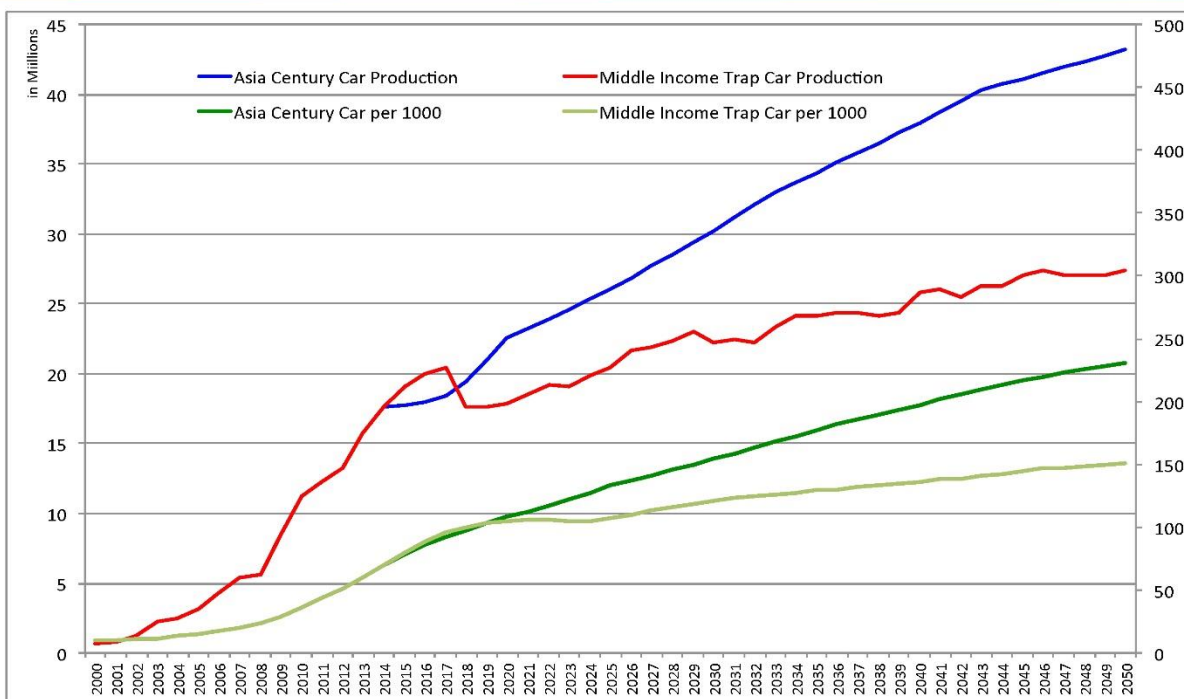


Asia GDP: US\$148 trillion

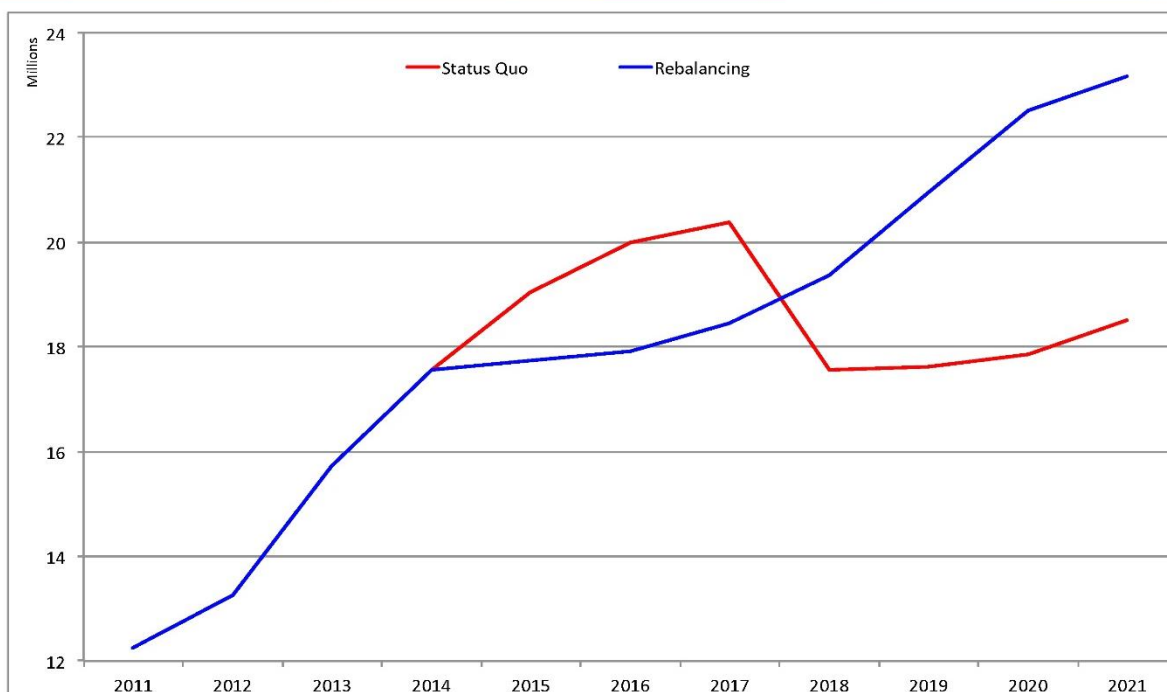


Asia GDP: US\$61 trillion

Forecast Passenger Car until 2050: 2 Scenarios



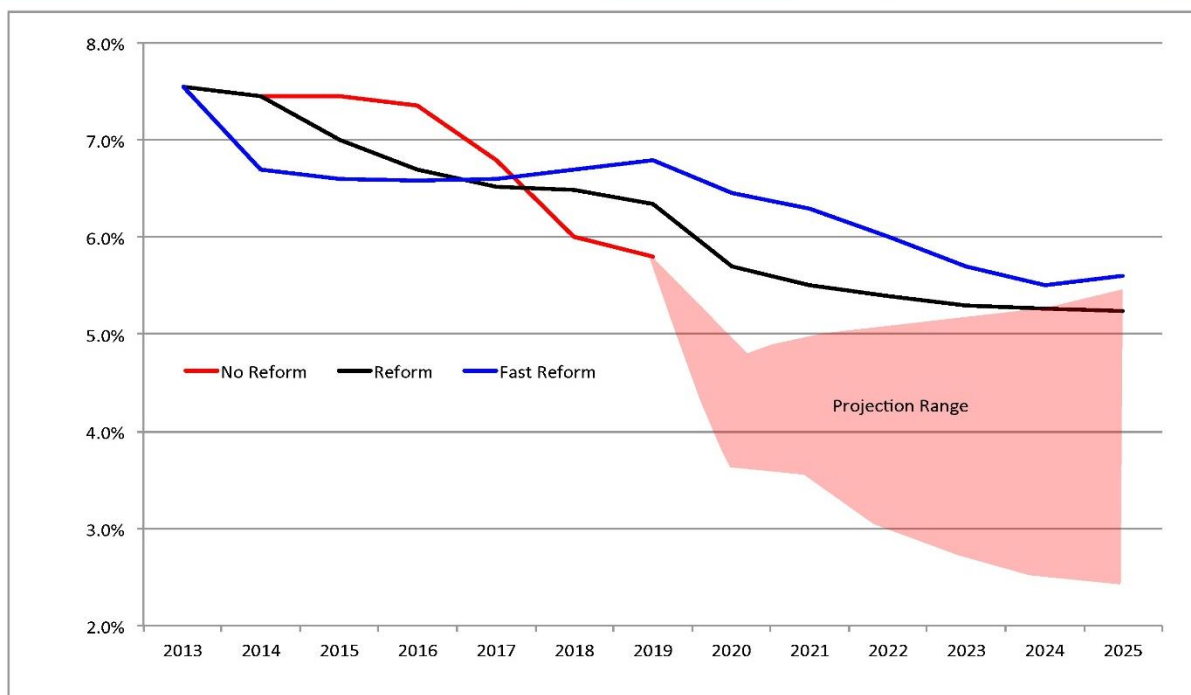
Forecast Passenger Car until 2021



IMF Report China July 2014

- The risk of a hard landing is low short term, but rises to medium in the medium term, should China not solve the main problems:
 - Real estate (including upstream and downstream now at 33% of the GDP growth!)
 - The corporations are highly leveraged
 - The local governments are in trouble financially
 - Banks NPLs are rising fast
 - Shadow banking getting out of control
- At the same time China must be careful with the implementation of the reforms. Otherwise a major crisis is possible, especially in case the real estate market undergoes a chaotic correction.

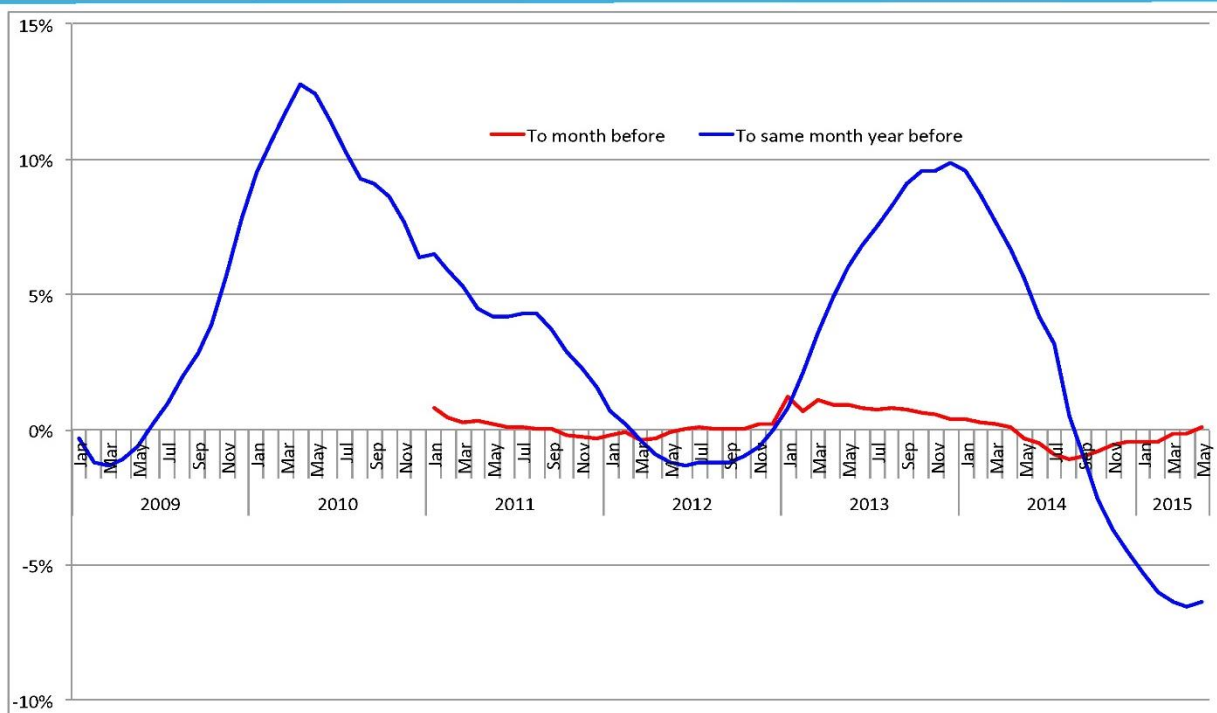
Scenarios of the IMF for China



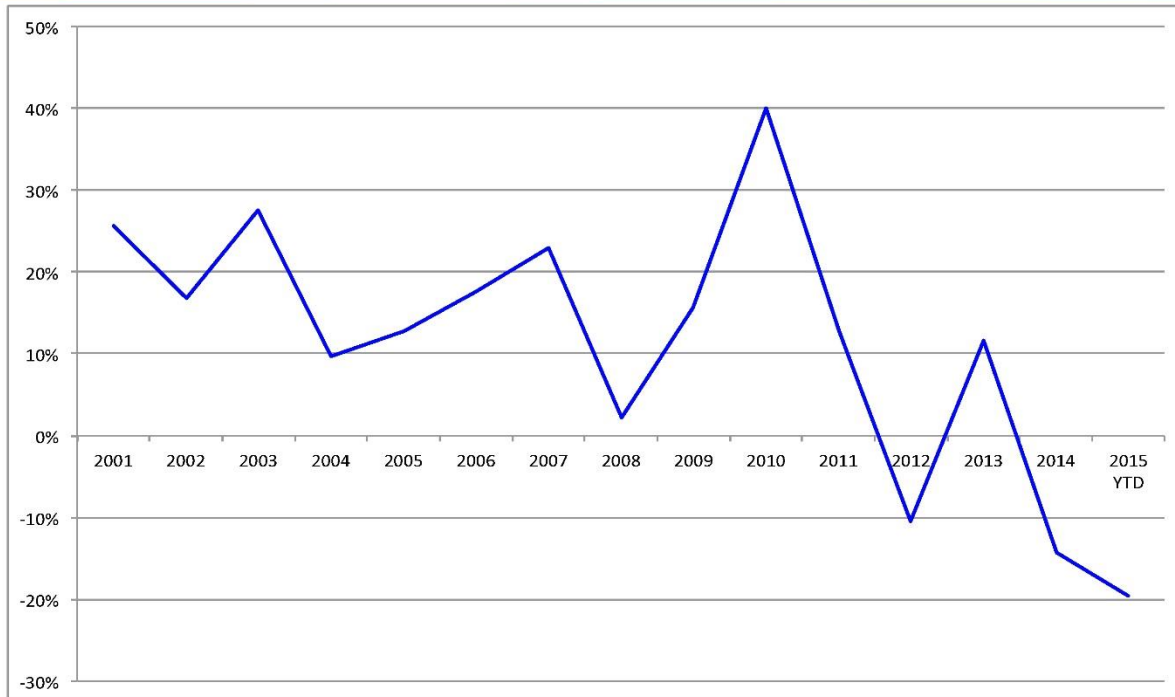
The most important indicators for rebalancing

- 🕒 Interest rate liberalization
- 🕒 WMPs allowed to default
- 🕒 Liberalization of the banking system
- 🕒 Hukou reform
- 🕒 Better social security
- 🕒 Reform of the healthcare system
- 🕒 More funds into education

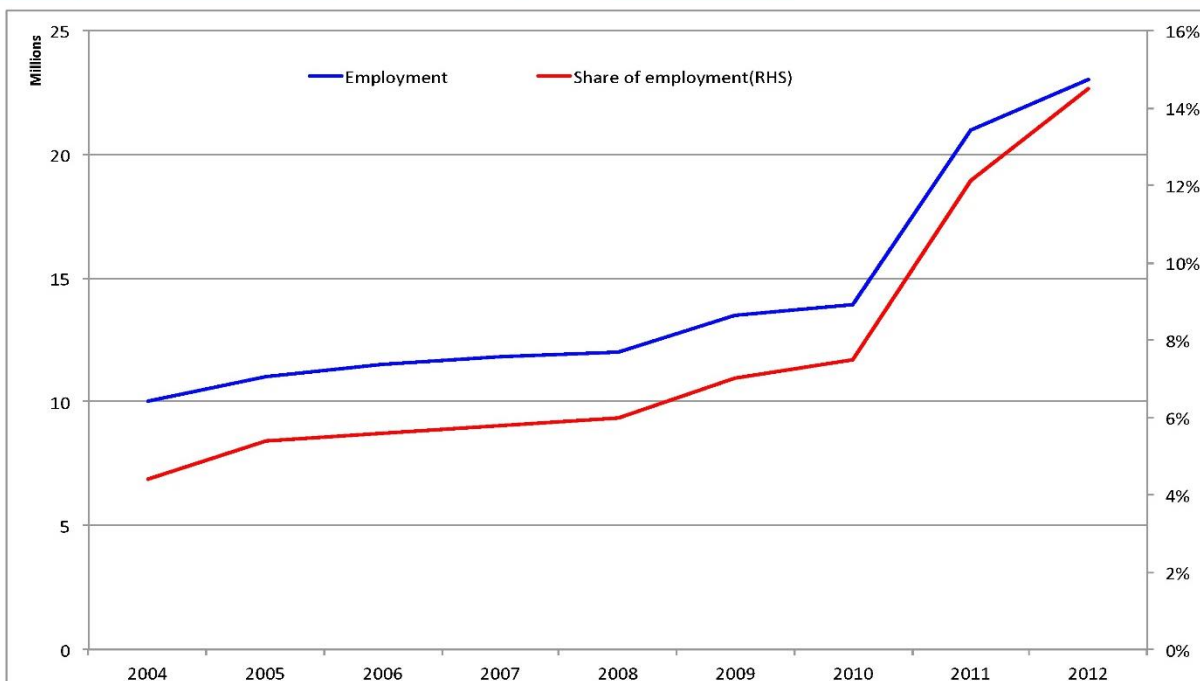
House prices are falling: Red alert!



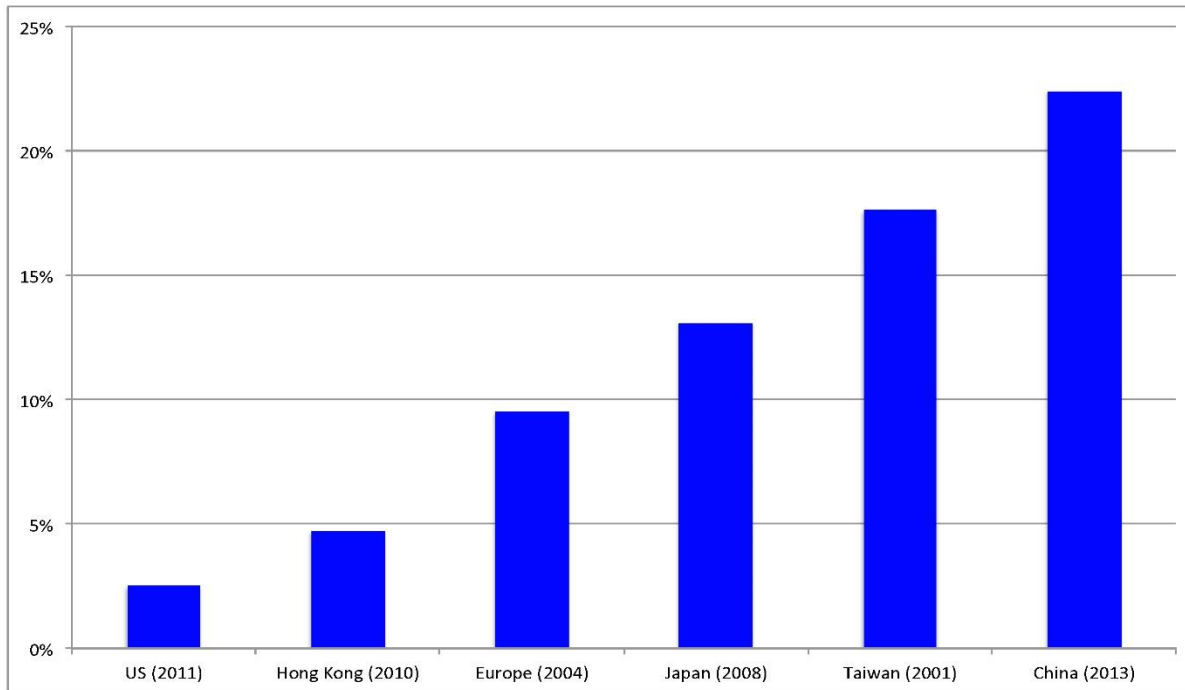
The real estate industry is in trouble: Floor space starts are down



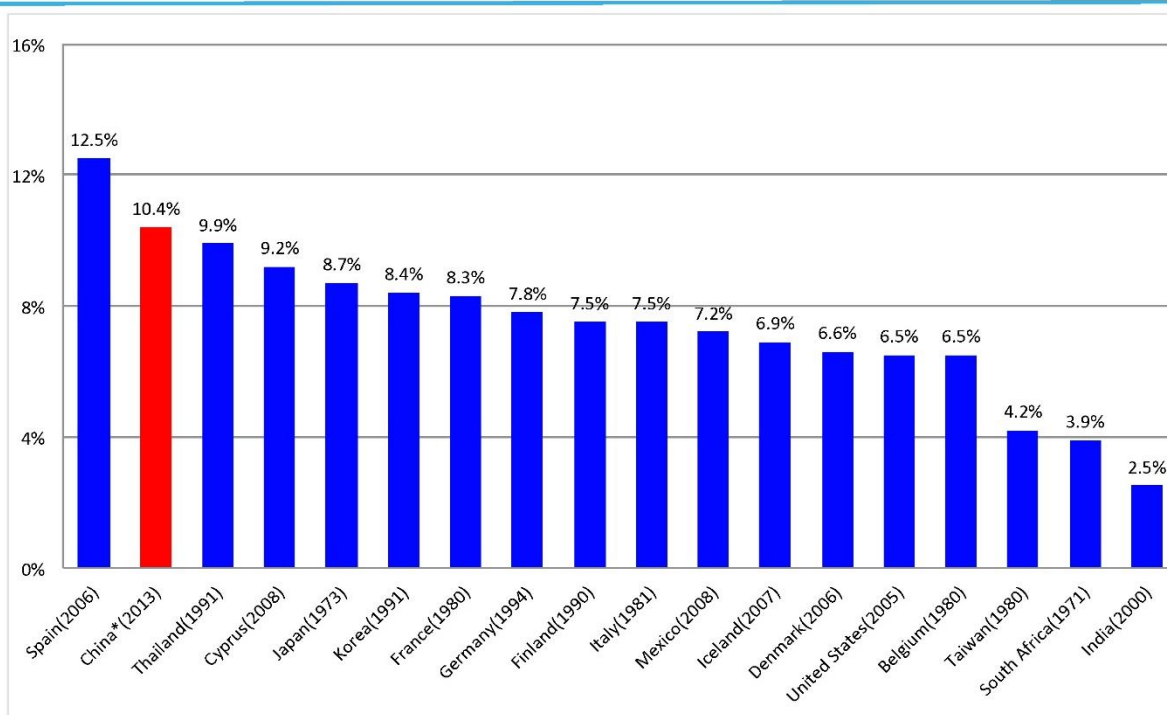
There are almost 25 million employees in urban real estate



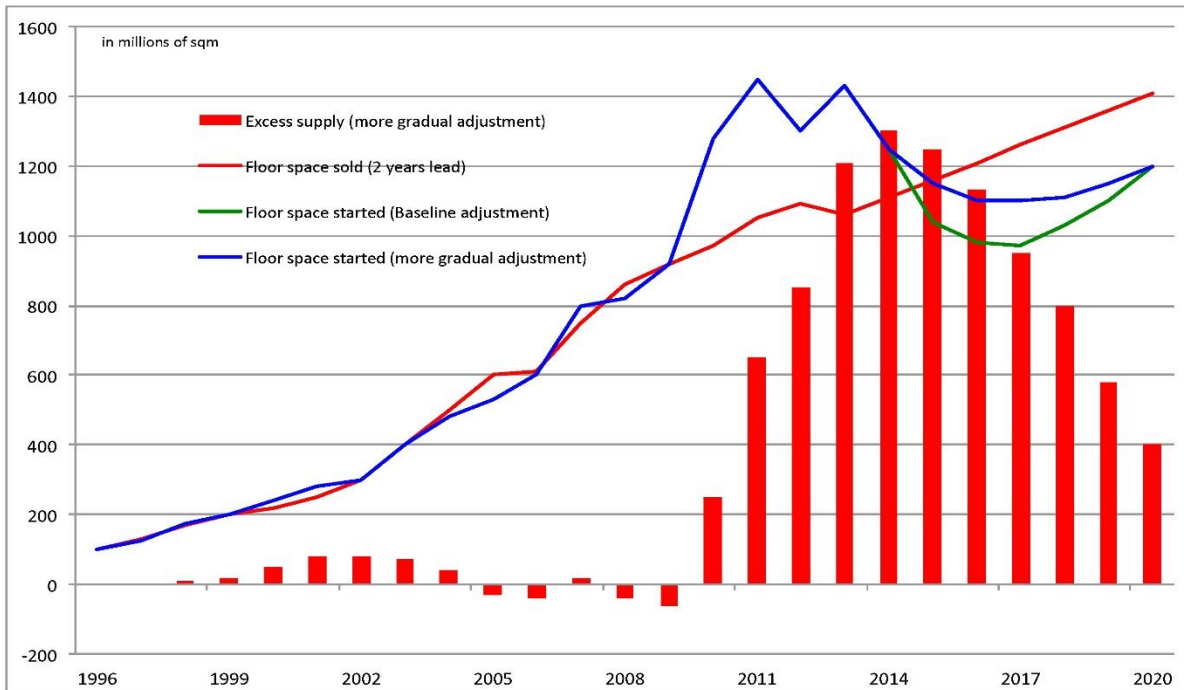
Vacancy rates are extremely high



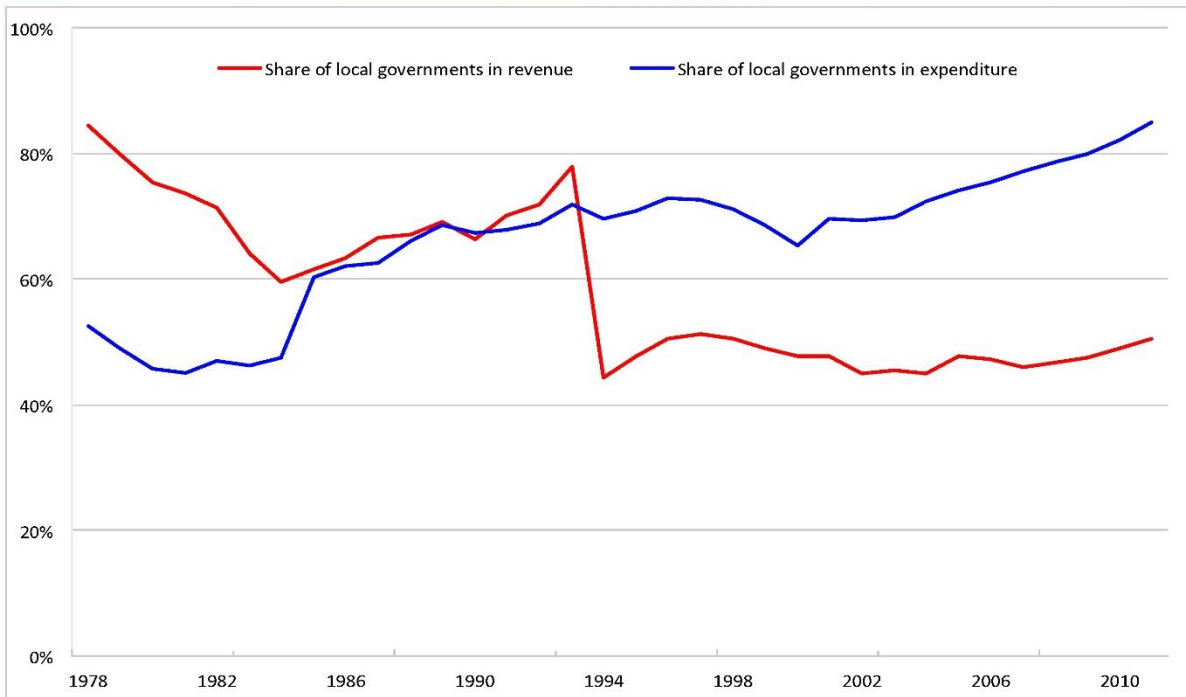
Residential real estate to GDP factor extremely high



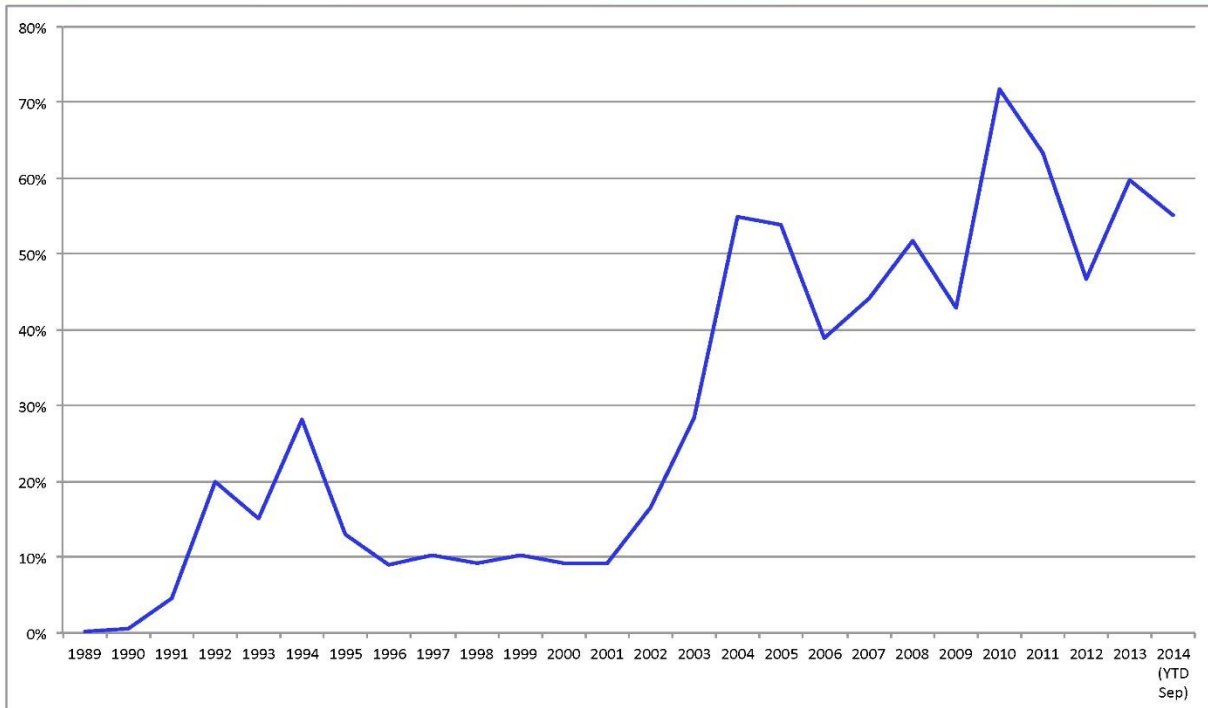
Real estate not likely to recover before 2017



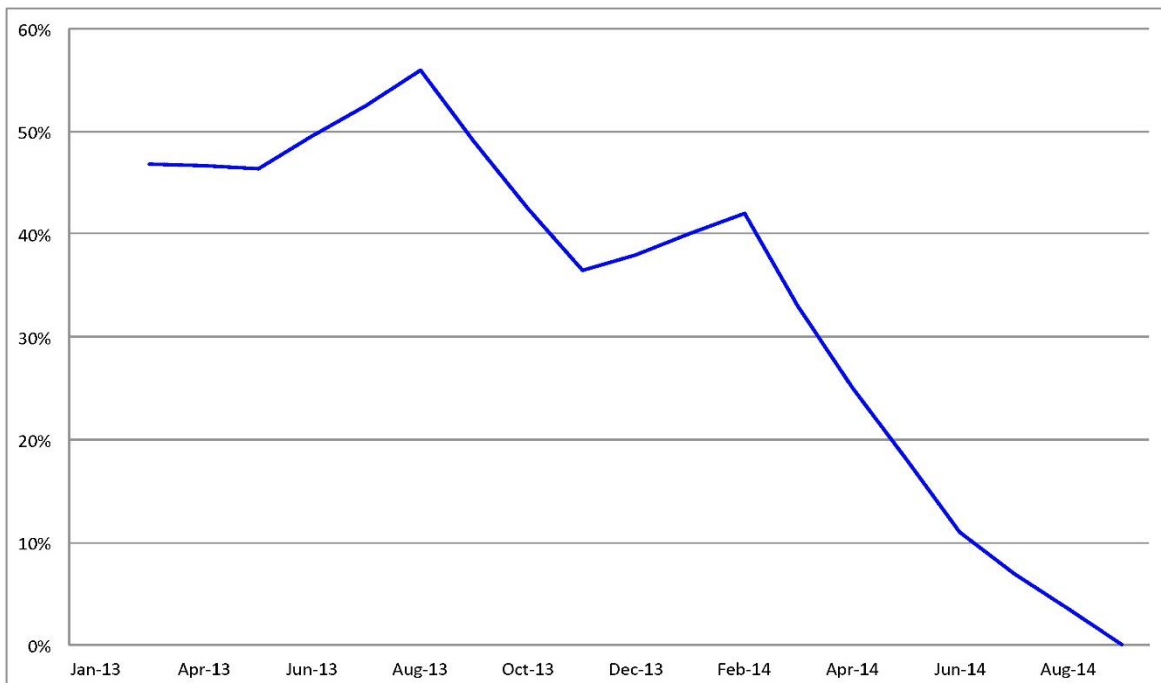
The fiscal system needs urgent change



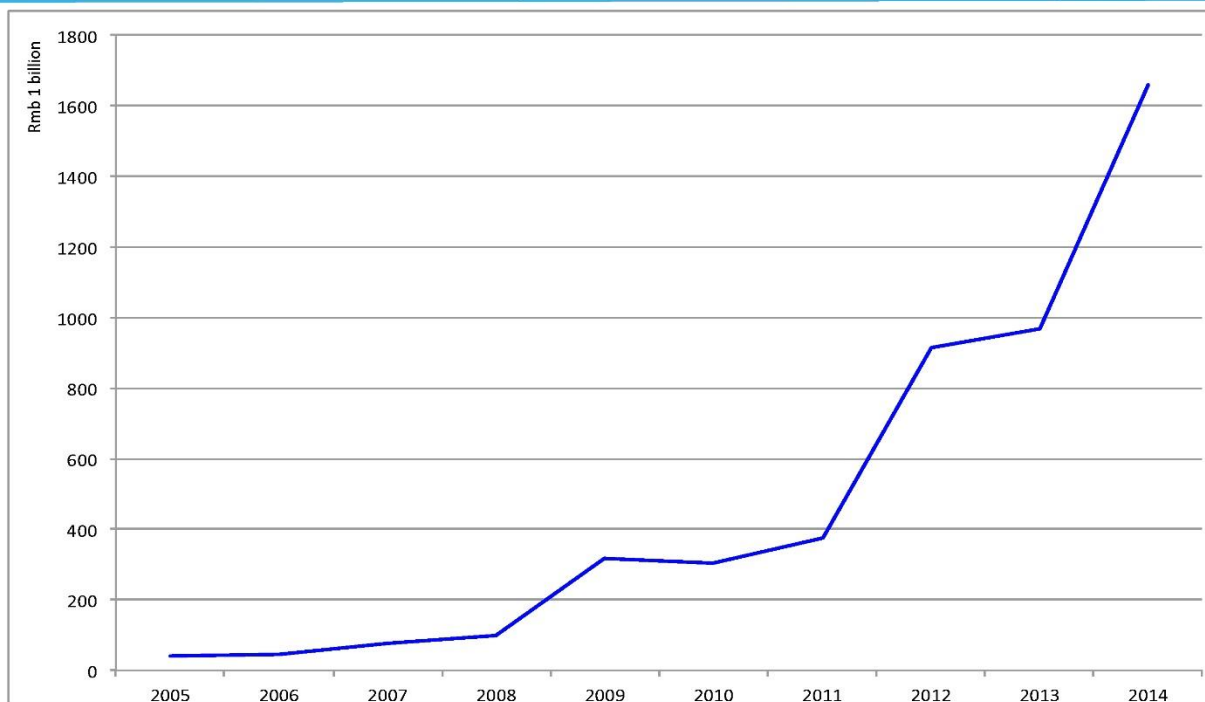
The local governments would be bankrupt without land sales: Share of land sales of the fiscal budget



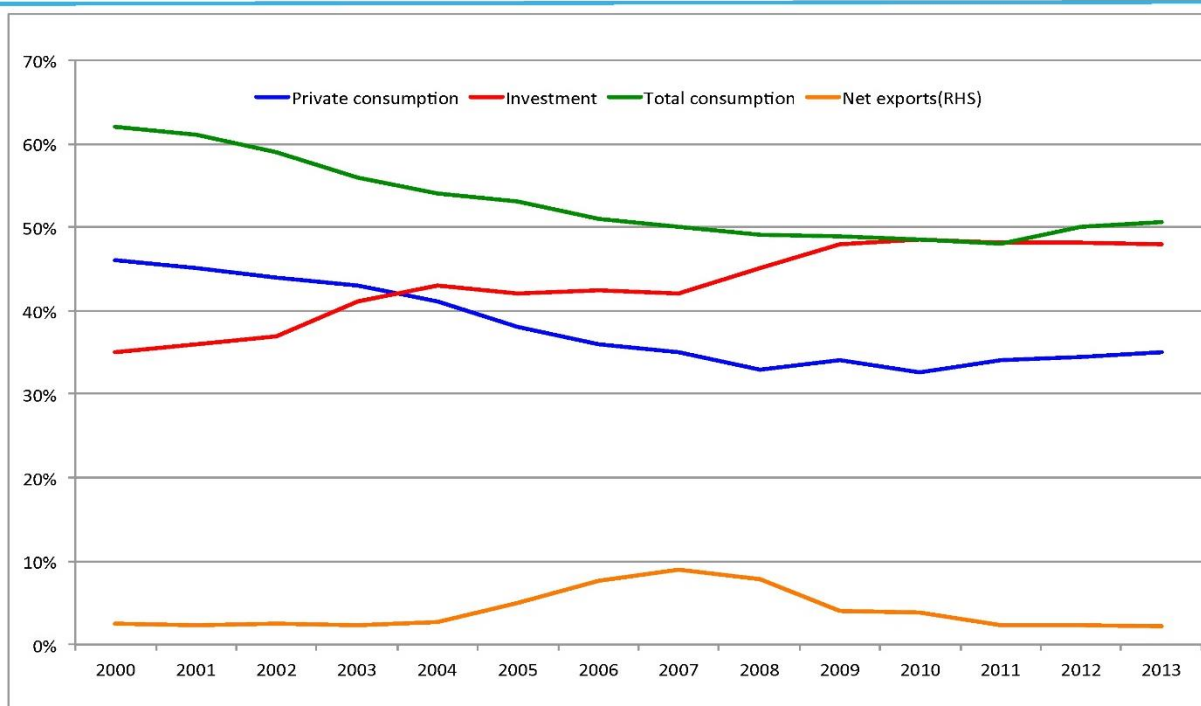
Government land sales revenues hardly growing anymore



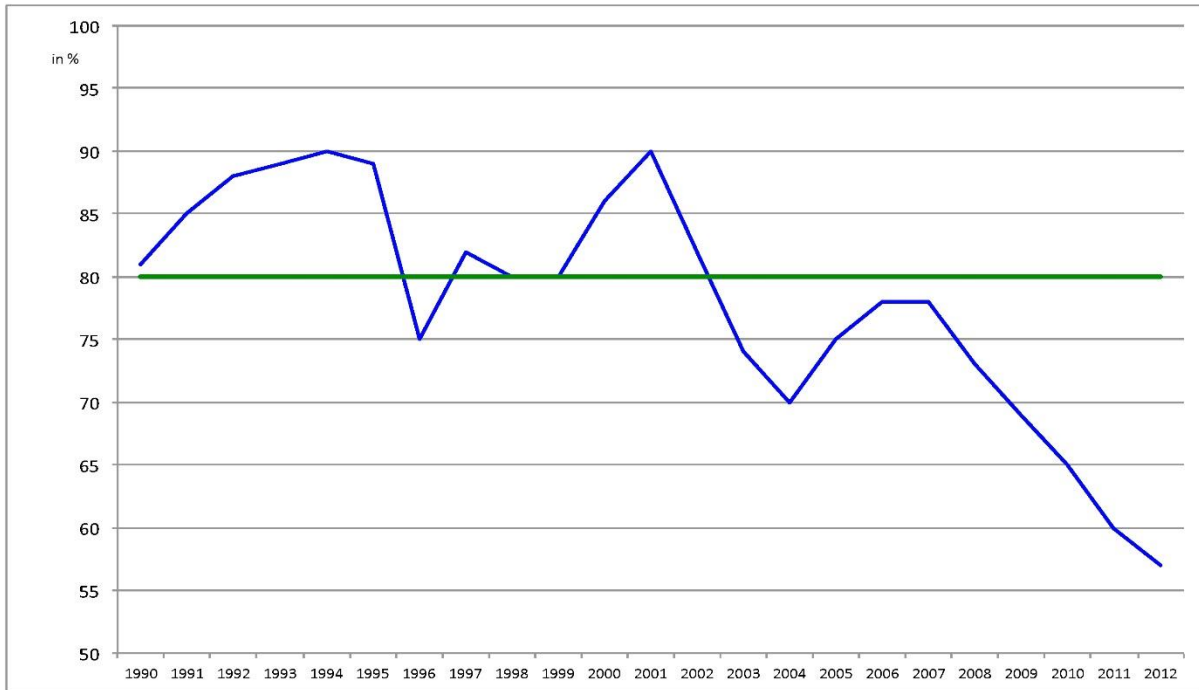
The Local Government Finance Vehicles are out of control



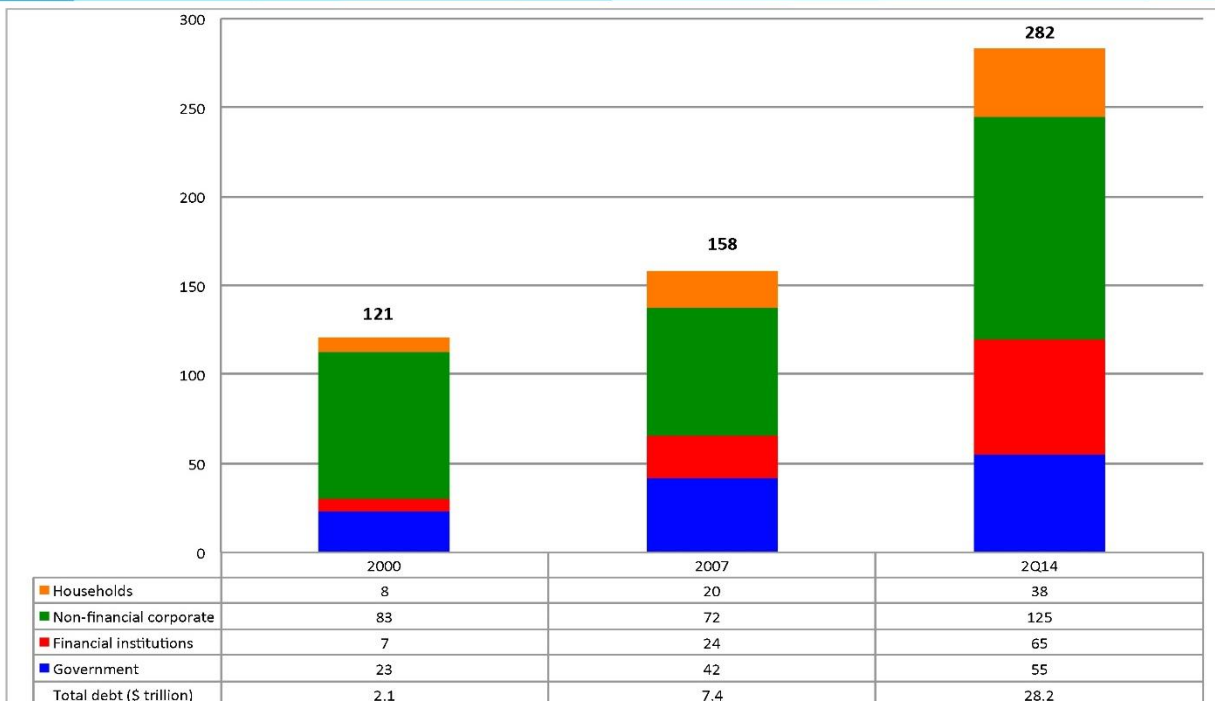
GDP by expenditure components: Household consumption still extremely low



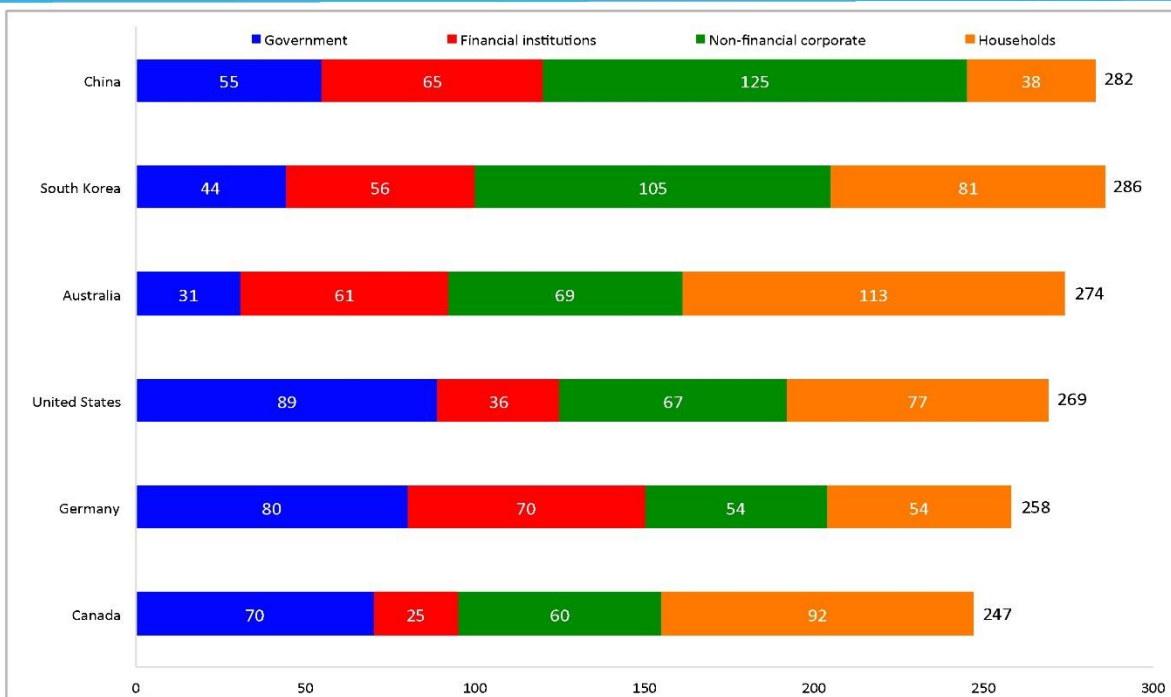
Capacity utilization across all industries



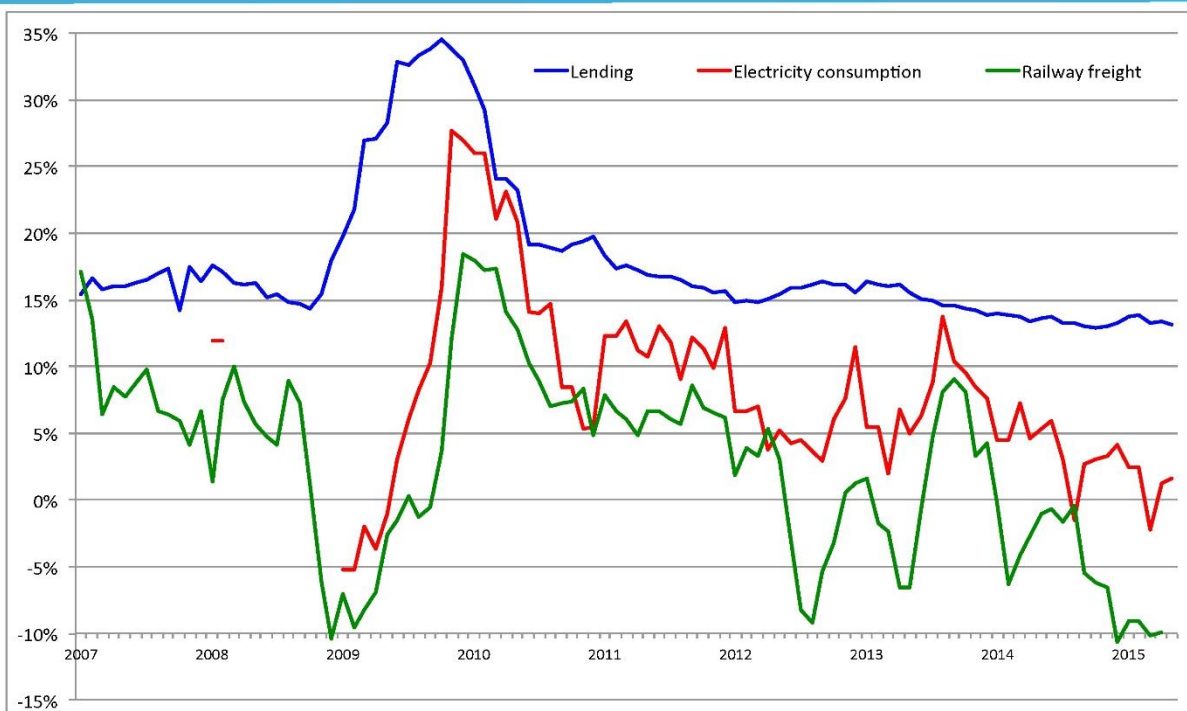
Debt to GDP ratio growing fast



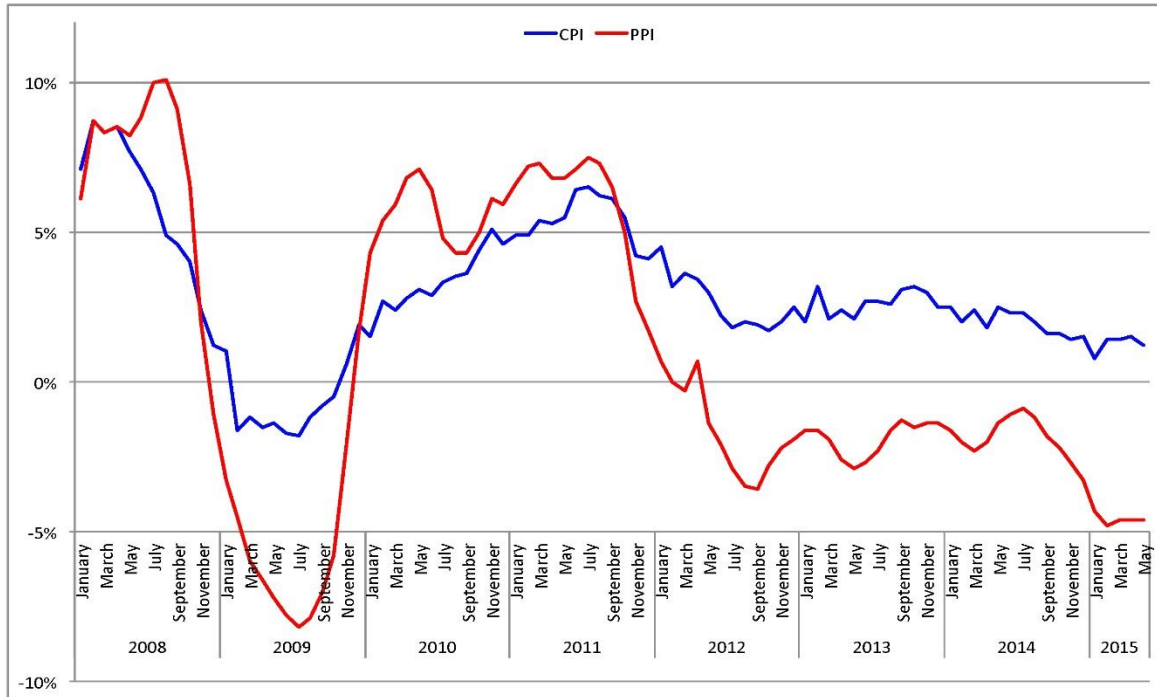
Debt to GDP ratio very high by now



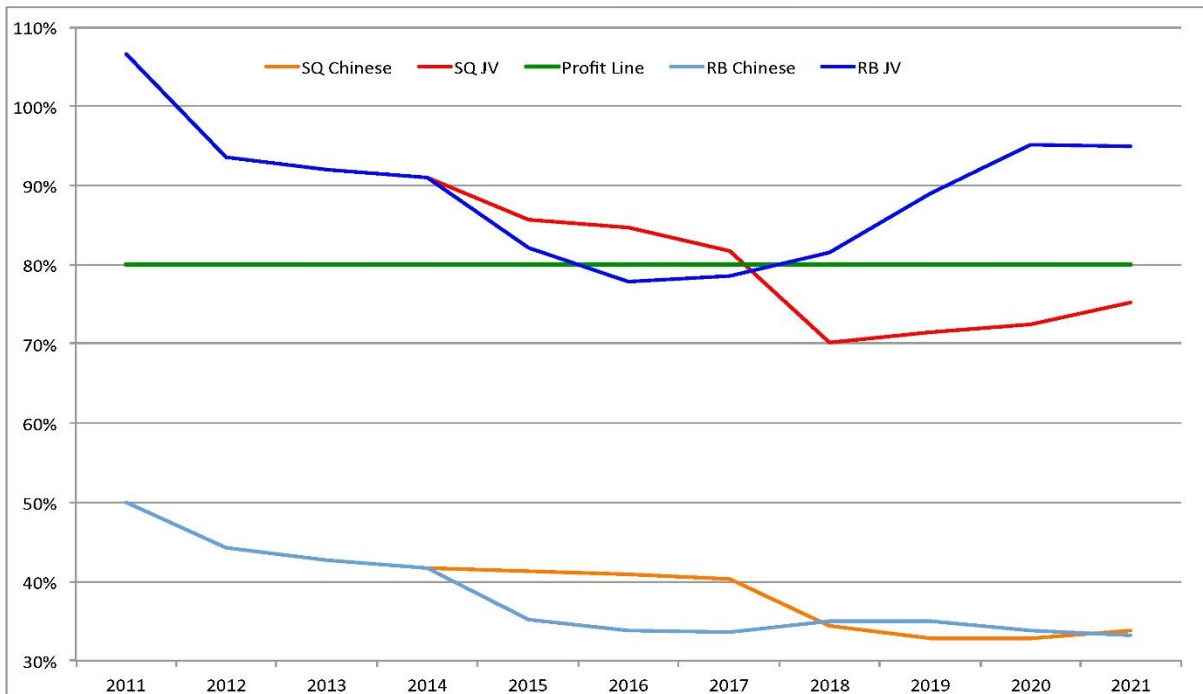
Li Keqiang's Index: Industry is hardly growing!



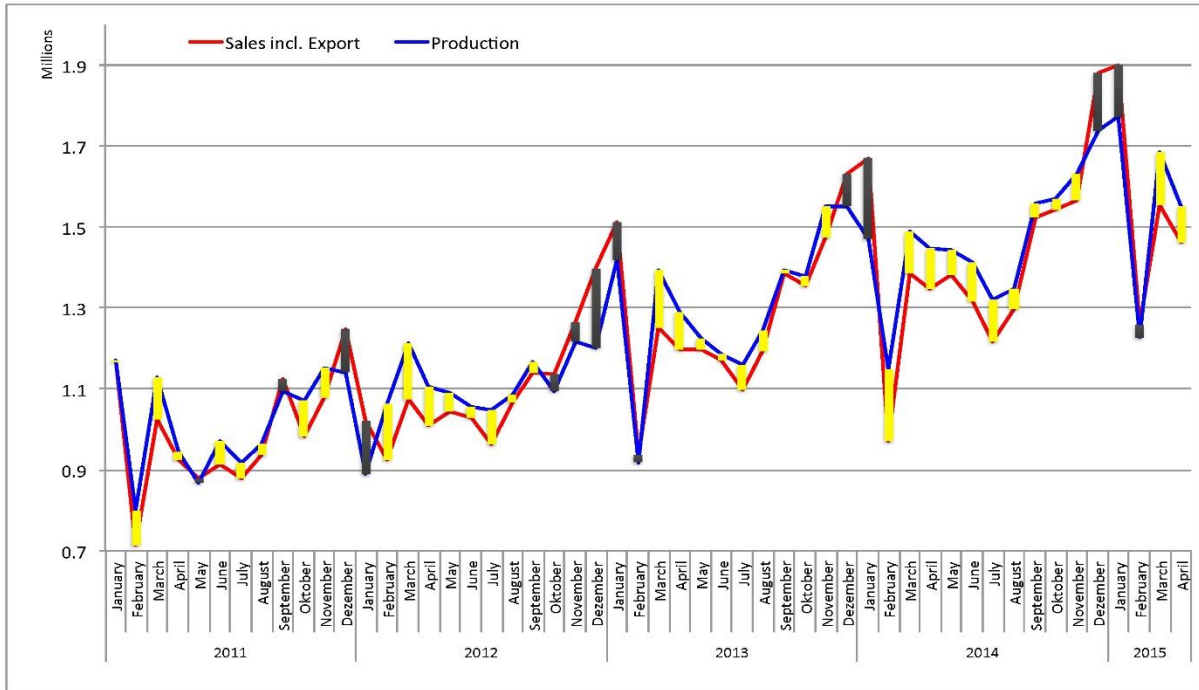
CPI also going towards deflation now



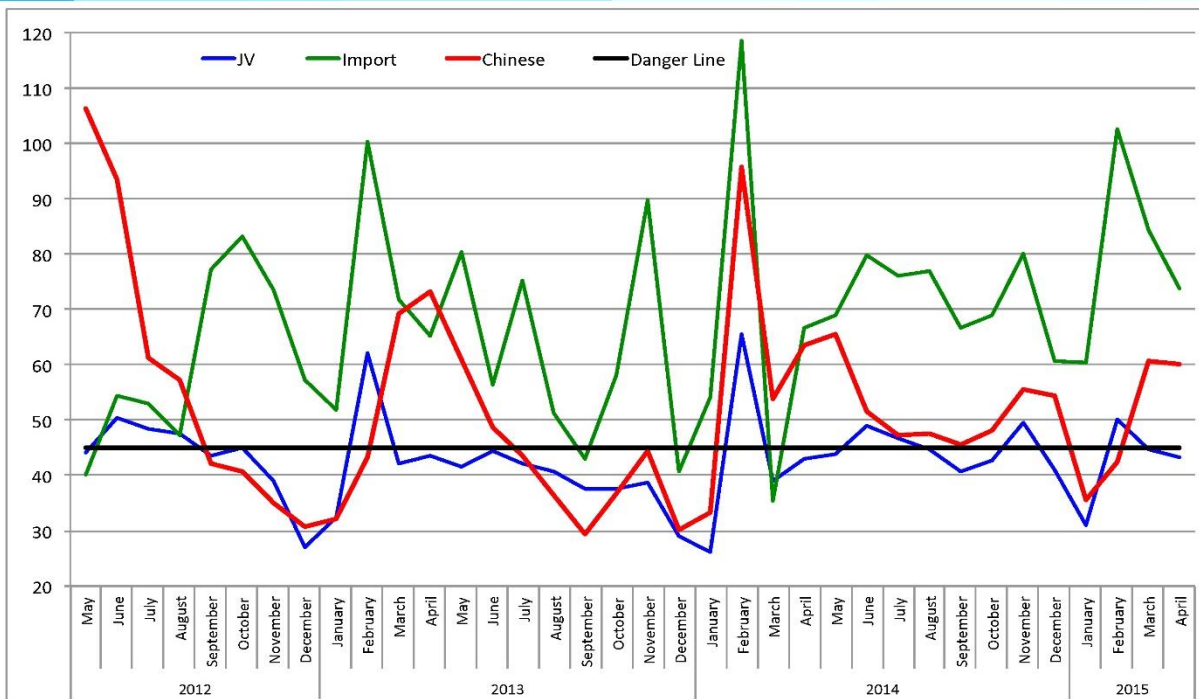
Capacity utilization of the carmakers



The carmakers have been building inventory



The dealer inventories were in the red zone for several months



The automakers keep up the production volumes for now

- OEMs build own inventory
- Some have started reducing the production
- Dealers are pumped up and incentives are increasing
- List prices are decreased (Polo now at 76000 RMB)
- Financial penetration increased to 20% with players like BMW closer to 40% with the loans bundled into ABS
- Model ranges get more entry level models
- Models get lower specifications
- But: 70% of the dealers were unprofitable in 2014 and since late 2014 they push back

The view on China is changing

- The new rules on the aftermarket, the dealerships and parallel imports are a major drag on the profitability for the OEMs
- The demand has decreased and led to hidden price reductions (discounts, financing, low spec models etc.)
- China is becoming a market with lower growth and decreasing margins
- Some OEMs, especially VW, have too much of their global business in China
- China will become a market to defend, not to grow anymore
- The competition will intensify and weaker players will be weeded out.
- The OEMs will look into new markets like ASEAN and Korea
- The perspective would only change mid term, if China gets beyond the Middle Income Trap



We Welcome You To Our Next Event

AluMag®

North America 2015 9th - 11th of Nov
 AUTOMOTIVE LIGHTWEIGHT
PROCUREMENT SYMPOSIUM
 Westin Hotel in Detroit, USA



AluMag®

AluMag SAE 2016 12th - 14th April
 Light Weighting - Emission Reduction - Car Comfort
 Technology Center, Booth # 763 - Detroit - Cobo Center, MI USA



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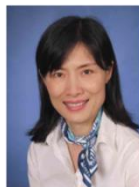
Europe 2016 27th - 29th of Nov
 AUTOMOTIVE LIGHTWEIGHT
PROCUREMENT SYMPOSIUM
 Hilton Hotel in Duesseldorf, Germany



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