



AUTOMOTIVE

Supporting you every step of the way as you
build, compete, and grow in various
markets around the world.

Growing demand from emerging markets, which have a higher sales volume than developed markets, along with the demand for more efficient, greener vehicles are the most significant developments in the automotive sector. Ipsos Business Consulting helps companies develop strategies and drive their business under these dynamic and disruptive conditions.

Ipsos Business Consulting

Build · Compete · Grow

Ipsos Business Consulting's Automotive practice draws on 20 years of expertise from consultants embedded in the Americas, Europe, Africa and Asia-Pacific.

WELCOME TO THE AUTOMOTIVE SECTOR

We established Ipsos Business Consulting's Automotive division in the 1990s and expanded our services to offer a wide range of consulting and market research solutions for the industry. Our practice is a leading provider of automotive research in Germany. We were one of the first consultancies to establish a division in Asia specialising in the commercial vehicles, passenger vehicles, parts and components, and after-service sectors. Our unique combination of consultants, analysts and market researchers provide commercial and government organisations with an extensive range of services and capabilities from across our network of offices which spans 88 countries and five continents.

HOW WE CAN SUPPORT YOU

Ipsos Business Consulting develops practical solutions to build, compete and grow your operations within the Automotive industry, whether you are expanding within an existing market or entering new territories. Our proven methodologies provide you with a full range of services ranging from market sizing and growth forecasts in emerging markets to conducting complex multinational value-chain analysis.

HOW IPSOS BUSINESS CONSULTING ASSISTS AUTOMOTIVE CLIENTS

- 1) Business Unit Strategy:**
Re-aligning your business strategies with changing market conditions
- 2) Competitive Intelligence:**
Assessing current and emerging competitive threats within your chosen markets
- 3) Go-to-Market:**
Market entry strategies that suit your business model and target customers

- 4) Innovation Scouting:**
Identifying new market opportunities or business concepts that will grow your business
- 5) Sales & Marketing:**
Developing customised strategies to tackle your business' market-related issues
- 6) Partner evaluation:**
Robust commercial diligence service to help you find the best business partner

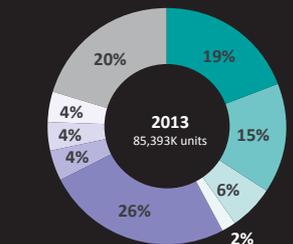
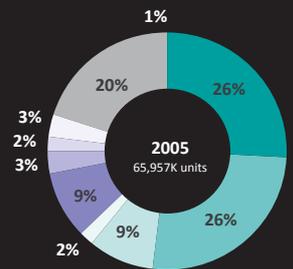
FIND OUT MORE ONLINE

Visit Ipsos Business Consulting online to find out more about our global offering, including more information on our solutions, case studies, industry reports, research notes and other interesting Ipsos publications. We have 20 dedicated consulting hubs servicing clients in the 88 countries that make up the Ipsos global network. This makes us uniquely placed to help you reach out to the developed and emerging markets that interest your business.

TOTAL VEHICLES SALES BY UNIT IN EMERGING AND DEVELOPED MARKETS 2005 – 2013

From 2005 to 2013, China share of global automotive sales grew from 9% to

26%



- | | |
|------------------|-----------------|
| Developed | Emerging |
| USA | CHINA |
| EU | BRAZIL |
| JA PAN | INDIA |
| CANADA | RUSSIA |
| | Others |

Source: OICA (International Organization of Motor Vehicle Manufacturers)

AUTOMOTIVE CATEGORIES WE WORK IN



Commercial Vehicles
Manufacturing and/or Sales of Commercial Vehicles



Lubricants & Vehicle Energy
Lubricants, Gasoline, Batteries, Hydrogen Fuel Cells, etc.



Off Road Vehicles
Bulldozers, Excavators, Agricultural Tractors, Forklifts, etc.



Parts & Components
Body Parts, Telematics, Interiors, Powertrains, Chassis, etc.



Passenger Vehicles
Manufacturing and/or Sales of Passenger Vehicles

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 Automotive Practice: automotive.bc@ipsos.com