

*Perspectivas energéticas,
nuevas tecnologías y su
influencia en el mercado
automotor*

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Bloomberg, L.P.

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Sector

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- 4) Consumer Discretionary
- 5) Consumer Staples
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Industry Dashboards Latest Analysis

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104) Diversified Entertainment, North America	BI DVENN	☆
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106) Local Media, North America	BI LOCLN	☆
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Consumer Discretionary

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111) Airlines, Europe	BI AIRLE	☆
112) Airlines, Asia-Pacific	BI AIRLA	☆
113) Auto Parts, Global	BI AUTPG	☆
114) Auto Retail Stores, North America	BI AUTRN	☆
115) Automobile OEM, Global	BI AUTMG	☆
116) Automobile OEM, North America	BI AUTMN	☆
117) Automobile OEM, Asia-Pacific	BI AUTMA	☆
118) Casinos & Gaming, Global	BI GAMEG	☆
119) Department Stores, North America	BI DEPTN	☆
120) Home Builder, North America	BI HOMBN	☆
121) Home Improvement Stores, North America	BI HOMCN	☆
122) Specialty Apparel Stores, North America	BI APPRN	☆
123) Specialty Apparel Stores, Europe	BI APPRE	☆

Bloomberg Industries

Automotive Dashboards

<HELP> for explanation, <MENU> for similar functions.
 <Menu> to Return, 94<Go> to Hide Sidebar

Search BI 91) Actions 92) Contact BI **Bloomberg Industries**
 Automobile OEM (BI AUTMN) 96) Industry Classification (BICS) **North America**

Analysis

- Overview
- Bull & Bear
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Top BITs »

Ford Pickups Outsell GM at Higher Prices With Fewer Incentives (09/17)
 Ford and GM increased incentives on full-sized pickups in August in an attempt to sell down inventory ahead of new 2013 models. GM gave \$4,747 on the Silverado ...

Most Recent »

- 1) ✓ Ford Pickups Outsell GM at Higher Prices With Fewer Incent... 09/17
- 2) ✓ Large Trucks Sitting on Lots for Longest Time This Year 09/17
- 3) Mazda, Mitsubishi and Suzuki Fade in the Mirror of U.S. Mar... 09/17
- 4) Edmunds Auto Deals-of-the-Month Just in Time for Back-to... 09/07
- 5) American, Asian Vehicles Most Fuel-Efficient Within Top Seg... 09/07
- 6) Tax Breaks Drive U.S. Light Truck Buyers to Showrooms in 4Q09/07
- 7) Mileage Champs Win at the Gas Pump, Lose in the Dealer S... 09/07
- 8) GM Charges Into Top Slot as the Plug-In Electric Sales Leader 09/07
- 9) East Beats West as 85% of U.S. Hybrid Vehicle Sales Go to A... 09/07

Key Data Releases »

- 10) ⚡ Large Cars Sit 3 Months on Dealer Lots, Most This Year: BI ... 09/12
- 11) ⚡ Prices of Large Trucks Rise 9% Ytd to \$39,820 in U.S.: BI C... 09/11
- 12) ⚡ U.S. Autos Sit on Lots for 58 Days, Longest Since 2009: BI ... 09/11
- 13) ⚡ Automaker Incentives in U.S. Reach \$2,298; Highest Ytd: B... 09/10
- 14) ⚡ Large Trucks Make U.S. Comeback Amid Higher Gas Prices: ... 09/05

Key Indicators Latest

Drivers

31) US Auto Spend...	25.54k
32) US Auto SAAR ...	14.30
33) US Auto Price(\$)	26.85k
34) Canada Auto P...	78.50
35) US Gas Price (\$)	4.10

Metrics

36) NA Auto Sales	4.52M
37) Gross Margin (%)	16.96
38) Inventory Days	41.42
39) Inv. Turnover	8.84
40) Finished Inv.(...	13.10k

Competitors YTD

51) Volkswagen	+31.76
52) Toyota Motor	+24.76
53) General Motors	+22.35
54) Daimler	+17.92
55) BMW	+15.30
56) Hyundai Motor	+13.15
57) Honda Motor	+10.73
58) Ford Motor	-3.35
59) Nissan Motor	+1.30

[< Previous](#) [Next >](#)

What is Wellpoint's Capital Structure? **CAST**

North America Auto Production

YTD through August

Automobile OEM (BI AUTMN) % Industry Classification (BICS)

North America



51) Industry

52) US Monthly Trends

View	9 Mon	Growth YoY	CUR USD Zoom 100%							
			8/2012	7/2012	6/2012	5/2012	4/2012	3/2012	2/2012	1/2012
Vehicle Sales & Production (...)										
Vehicle Sales										
North America			17.7%	8.6%	19.3%	24.4%	-1.4%	11.6%	15.2%	11.6%
Canada			6.4%	4.7%	2.8%	17.9%	-1.4%	2.8%	11.1%	15.4%
Mexico			10.1%	11.4%	14.8%	16.9%	7.1%	11.2%	11.5%	9.5%
United States			19.7%	8.9%	22.1%	25.7%	2.3%	12.7%	15.8%	11.4%

North America Auto Production

YTD 2012 Through August

	YTD 2012	YTD 2011	
NA LIGHT VEHICLE PRODUCTION	10,682,949	8,762,394	22%
Total Car	4,822,089	3,728,302	29%
Total Truck	5,860,860	5,034,092	16%
TOTAL MEXICO	1,919,711	1,681,425	14%
Mexico Car	1,217,300	1,105,818	10%
Mexico Truck	702,411	575,607	22%
As a % of Total NA Production			
TOTAL MEXICO	18.0%	19.2%	
Mexico Car	25.2%	29.7%	
Mexico Truck	12.0%	11.4%	



Mexico Auto Production

Largest producer by volume through August 2012

NISSAN

YTD 2012

YTD 2011

TOTAL NISSAN

467,517

374,109 25%

March



103,441

19,290 436%

Sentra



114,301

108,294 6%

Versa

132,331

132,338 0%

Tiida

25,337

28,155 -10%

Tsuru

27,844

42,548 -35%

NISSAN Car

403,254

330,625 22%

NISSAN Truck

64,263

43,484 48%

Source: Automotive News

Mexico Auto Production

Through July 2012

General Motors	YTD 2012	YTD 2011	
TOTAL GENERAL MOTORS	356,648	379,120	-6%
Chevrolet Chevy C2	-	28,113	
Chevrolet Sonic	4,298	-	
Chevrolet HHR	-	29,460	
Saab 9-4X	-	457	
Chevrolet Aveo	55,941	43,993	27%
General Motors Car	60,239	102,023	-41%
Cadillac SRX	61,863	57,336	8%
Chevrolet Captiva Sport	40,286	23,174	74%
Cadillac Escalade EXT	1,681	1,679	0%
Chevrolet Avalanche	17,221	17,826	-3%
Chevrolet Silverado/Cheyenne	110,635	120,860	-8%
GMC Sierra	64,723	56,222	15%
General Motors Truck	296,409	277,097	7%

Discontinuation of car models and a 1.3% decrease in GMT-900 platformed trucks drives down GM's Mexico assemblies

“Perspectivas energéticas, nuevas tecnologías y su influencia en el mercado automotor”

- Fuel Efficiency
- Safety
- Connectivity
- Research and Shopping

“...influencia en el mercado automotor”



“...influencia en el mercado automotor”

Automobile OEM (BI AUTMN) 96) Industry Classification (BICS)

51) Industry

52) US Monthly Trends

View 12 Mon Growth None

8/2012

- Vehicle Sales by Segment (Units)			1.280M
+ Mid-Size Car			213,340.0
+ Compact Car			210,948.0
+ Large Truck			154,139.0
+ Compact Crossover SUV			122,299.0
+ Mid-Size Crossover SUV			87,151.0

Automotive Technology

- Fuel Efficiency
 - Alternative Powertrain Vehicles
 - Battery Electric Vehicles

Automotive Technology

View	12 Months	Growth	None	
				8/2012
+ Vehicle Sales by Brand (units)				1.280M
+ Vehicle Sales by Segment (units)				1.280M
- Vehicle Sales by Alternative Powertrains (units)				45,163.0
+ Toyota				28,960.0
+ GM				6,831.0
+ Hyundai				3,925.0
+ Ford				2,137.0
+ Honda				1,448.0
+ Kia				907.0
+ Nissan				745.0
+ Porsche				117.0
+ Mitsubishi				37.0
+ BMW				26.0
+ Volkswagen				17.0
+ Daimler AG				13.0

3.5%

Source: Bloomberg Industries, Autodata Corp.
Manufacturer Reported Data for US Sales

Automotive Technology

Battery Electric Vehicles

View 12 Months Growth None

			8/2012
+ Vehicle Sales by Brand (units)			1.280M
+ Vehicle Sales by Segment (units)			1.280M
- Vehicle Sales by Alternative Powertrains (units)			45,163.0
+ Toyota			28,960.0
+ GM			6,831.0
+ Hyundai			3,925.0
+ Ford			2,137.0
+ Honda			1,448.0
+ Kia			907.0
+ Nissan			745.0
+ Porsche			117.0
+ Mitsubishi			37.0
+ BMW			26.0
+ Volkswagen			17.0
+ Daimler AG			13.0

64%

Source: Bloomberg Industries, Autodata Corp.
Manufacturer Reported Data for US Sales

Automotive Technology

Battery Electric Vehicles




















View	12 Months	Growth	None		8/2012	7/2012	6/2012	5/2012	4/2012
Edmunds.com® Data (US Specific)					9.5%				
Transactional Data									
+ True Market Value TMV®					30,801.0	31,090.0	31,091.0	30,930.0	30,857.0
+ True Cost Incentive TCI®					2,298.0	2,237.0	2,223.0	2,222.0	2,055.0
+ TCI®/TMV®(%)					7.46	7.20	7.15	7.18	6.66
+ Lease Penetration (%) - Average					22.1	22.7	22.1	21.8	21.1
Web-Metric Data									
+ Segment Consideration (%) - Average					6.7	6.5	6.6	6.7	6.7
+ Purchase Intent (%) - Average					5.9	5.8	5.8	5.8	5.9
Source: Edmunds.com®									
Purchase Intent & Consideration									
Averaged by Bloomberg Industries									


Automotive Technology

Battery Electric Vehicles

View 12 Months Growth None

7/2012

[-] Toyota			27,125.0
Avalon			35,053.0
Camry			24,261.0
Camry Hybrid			27,425.0
Corolla			18,597.0
FJ Cruiser			32,769.0
Highlander			34,616.0
Highlander Hybrid			45,703.0
Land Cruiser			73,400.0
Matrix			21,154.0
Prius			26,757.0
RAV4			26,159.0
Sequoia			53,090.0
Sienna			32,391.0
Tundra			34,410.0
Tacoma			26,719.0
Venza			31,096.0
Yaris			16,508.0
4 Runner			36,620.0



Automotive Technology


Battery Electric Vehicles

View 12 Months Growth None

7/2012

Toyota			1,636.0
Highlander Hybrid			456.0
FJ Cruiser			550.0
Camry Hybrid			566.0
Land Cruiser			587.0
Matrix			618.0
4 Runner			638.0
Yaris			689.0
Sequoia			695.0
Prius			813.0
Tacoma			1,011.0
Corolla			1,380.0
Avalon			1,562.0
Camry			1,571.0
Sienna			1,936.0
RAV4			2,129.0
Highlander			2,280.0
Venza			2,430.0
Tundra			3,965.0

7.5%



Automotive Technology

Battery Electric Vehicles

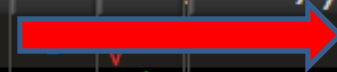
View

12 Months

Growth None

		7/2012
- Toyota		38.0
Avalon		54.0
Camry		38.0
Camry Hybrid		31.0
Corolla		28.0
FJ Cruiser		52.0
Highlander		42.0
Land Cruiser		65.0
Highlander Hybrid		29.0
Matrix		109.0
Prius		25.0
RAV4		35.0
Sequoia		63.0
Sienna		52.0
Tundra		63.0
Tacoma		30.0
Venza		73.0
Yaris		66.0
4 Runner		44.0

60 Days



Automotive Technology

- Fuel Efficiency
 - Alternative Powertrain Vehicles
 - Battery Electric Vehicles
 - Plug-in Hybrid Electric Vehicles

Automotive Technology

Plug-in Hybrid Electric Vehicles



CARS CROSSOVERS & SUVs TRUCKS & VANS ALL

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2013 Volt | 2012 Volt

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KBB Consumer Rating
 **9.5 out of 10**
overall rating

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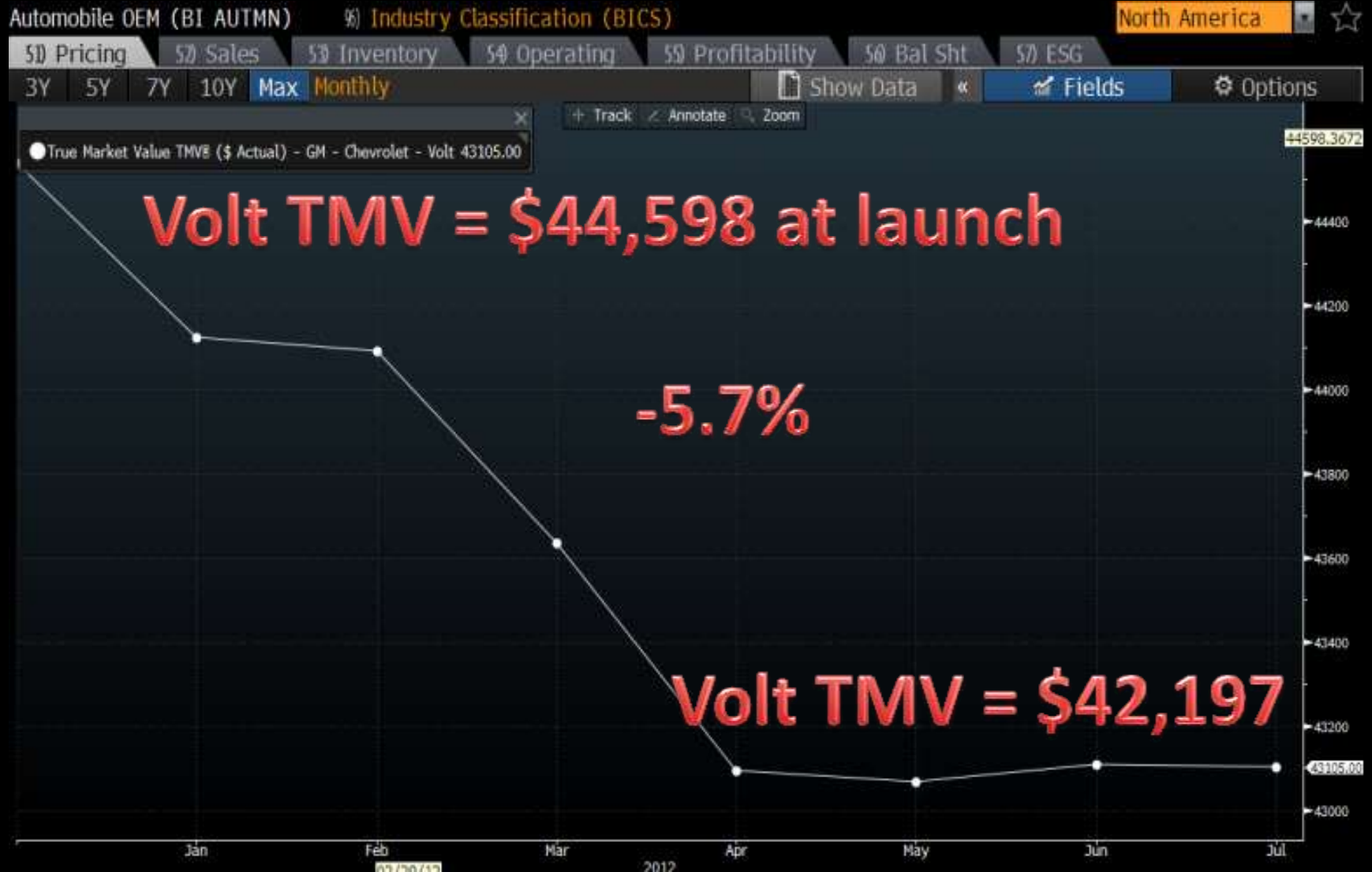
Automotive Technology

Plug-in Hybrid Electric Vehicles



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Plug-in Hybrid Electric Vehicles



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Plug-in Hybrid Electric Vehicles



Automotive Technology

Plug-in Hybrid Electric Vehicles



Automotive Technology

- Fuel Efficiency
 - Alternative Powertrain Vehicles
 - Battery Electric Vehicles
 - Plug-in Hybrid Electric Vehicles
 - Electric Vehicles

Automotive Technology

Electric Vehicles



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September 23, 2012.



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electric?**



Automotive Technology

Electric Vehicles

View	12 Mon	Growth	None	8/2012	7/2012	6/2012	5/2012	4/2012
[-] Compact Car			210,948.0	180,564.0	199,270.0	219,665.0	196,792.0	
Chevrolet - Cruze			25,975.0	14,954.0	18,983.0	19,613.0	18,205.0	
Honda - Civic			24,897.0	25,004.0	27,500.0	33,490.0	24,423.0	
Toyota - Corolla/Mat...			24,311.0	23,640.0	26,647.0	31,847.0	24,804.0	
Toyota - Prius			21,111.0	16,643.0	19,150.0	21,477.0	25,168.0	
Ford - Focus			19,073.0	16,454.0	21,186.0	24,769.0	19,425.0	
Hyundai - Elantra			17,989.0	18,512.0	17,655.0	18,877.0	16,836.0	
[+] Volkswagen - Jetta			15,446.0	13,629.0	13,604.0	15,175.0	15,658.0	
Mazda 3			11,120.0	9,027.0	8,835.0	8,474.0	8,508.0	
Nissan - Sentra			10,623.0	9,888.0	9,211.0	7,600.0	7,410.0	
Nissan - Versa			9,186.0	7,451.0	8,746.0	8,643.0	8,335.0	
Kia - Forte			7,300.0	6,216.0	7,461.0	7,782.0	7,053.0	
Buick - Verano			5,000.0	4,235.0	4,091.0	3,609.0	2,989.0	
Subaru - Impreza			4,000.0	4,553.0	5,181.0	6,786.0	6,791.0	
Dodge - Dart			3,000.0	772.0	202.0			
Chevrolet - Volt			2,000.0	1,849.0	1,760.0	1,680.0	1,462.0	
Scion - tC			2,000.0	2,013.0	2,128.0	2,190.0	2,008.0	
Volkswagen - GTI			1,000.0	1,568.0	1,508.0	1,568.0	1,717.0	
Mitsubishi - Lancer			1,302.0	1,162.0	1,250.0	1,099.0	1,115.0	
Nissan - Leaf			685.0	395.0	535.0	510.0	370.0	

Automotive Technology

Electric Vehicles

Automobile OEM (BI AUTMN) 96) Industry Classification (BICS)

North America

51) Pricing

52) Sales

53) Inventory

54) Operating

55) Profitability

56) Bal Sht

57) ESG

3Y 5Y 7Y 10Y Max Monthly

Show Data

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Options

Track Annotate Zoom

True Market Value TMVB (\$ Actual) - Nissan - Nissan - LEAF 37451.00

Peak at \$37,953

Off 1.0% to August



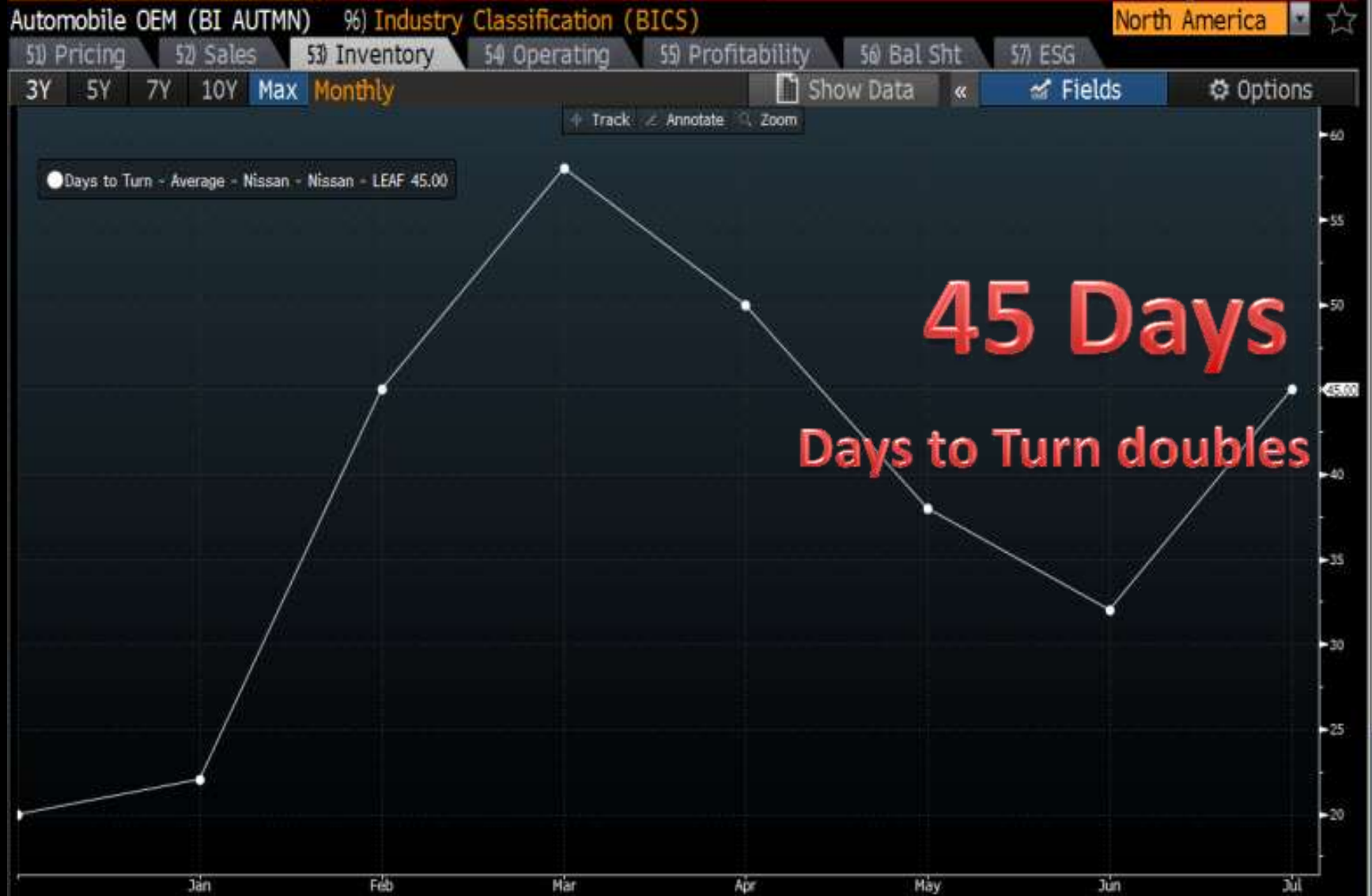
Automotive Technology

Electric Vehicles



Automotive Technology

Electric Vehicles



Automotive Technology

- Fuel Efficiency
 - Alternative Powertrain Vehicles
 - Battery Electric Vehicles
 - Plug-in Hybrid Electric Vehicles
 - Electric Vehicles
 - Small Displacement and Forced Induction

Automotive Technology

Small Displacement and Forced Induction



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Capability

Power

Fuel-Efficient Technology

EcoBoost® Engine

3.7L Ti-VCT V6

5.0L Ti-VCT V8

6.2L V8

Electronic 6-Speed Transmission with Tow/Haul Mode

SelectShift Automatic Transmission

F-150 SVT Raptor

Interior

Innovation

Power Fuel-Efficient Technology



How does an engine achieve impressive fuel economy and at the same time deliver excellent performance? Advanced technology is a big part of the answer – a major reason why Ford offers the most fuel-efficient full-size pickup.* •Twin-independent variable cam timing (Ti-VCT) is standard in the 3.7L V6, 5.0L V8 and EcoBoost® engines. With its precise variable, yet independent, control over intake/exhaust valve timing, Ti-VCT helps make possible higher fuel economy numbers as well as power ratings. •The innovative EcoBoost engine uses the precise fuel delivery of direct injection at each cylinder plus the high-performance capability of twin turbocharging. •Electronically controlled 6-speed automatic transmission, standard with all engines, has close-ratio gearing optimized for low-end performance and high-end efficiency.

*EPA-estimated 17 city/23 hwy/19 combined mpg, 3.7L V6 4x2.

Next Steps

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Automotive Technology

Small Displacement and Forced Induction

Automobile OEM (BI AUTMN) 96) Industry Classification (BICS)

51) Industry

52) US Monthly Trends

View

12

Mon

Growth

None

8/2012

Large Truck

Ford - F-Series

Chevrolet - Silverado C/K Pickup

Dodge - Ram P/U

GMC - Sierra

Toyota - Tundra

Chevrolet - Avalanche

Nissan - Titan

Honda - Ridgeline

Nissan - NV

Ford - Heavy Trucks

Cadillac - Escalade EXT

154,139.0

58,201.0

38,295.0

25,215.0

14,495.0

11,347.0

2,294.0

1,907.0

919.0

783.0

500.0

183.0

52,790



Automotive Technology

Small Displacement and Forced Induction



Automotive Technology

Small Displacement and Forced Induction



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Small Displacement and Forced Induction



Automotive Technology

Conclusions

- Fuel Efficiency

- Alternative Powertrain Vehicles

- Battery Electric Vehicles

~~\$25,944 net price~~ **price incentives powertrain vehicles**

- Plug-in Hybrid Electric Vehicles

~~\$28,534 net price~~ **price incentive for Volt**

- Electric Vehicles

~~\$32,542 net price~~ **100 units per month since 9/2011**

- Small Displacement and Forced Induction

~~\$100 net price~~ **units sell in 48 days vs 100**
~~100 units per month~~ **100 units per month**

Automotive Technology

Full Size Truck Comparison

	Chevy Silverado LT 4x4 Crew Cab	Ford F-150 XLT 4x4 SuperCrew	Ram 1500 SLT 4x4 Quad Cab
Vehicle Specs			
Engine	5.3L OHV V-8 16-valves	3.5L DOHC V-6 DI Twin-turbocharger	5.7L Hemi V-8 OHV 16-valve
HP/Torque	315/335	365/420	390/407
Trans	6-speed	6-speed	5-speed
Axle ratio	3.42:1	3.73:1	3.92:1
Tire size	275/65R18	275/55R20	275/60R20
EPA MPG, city/hwy	15/21	19/26 (est)	13/19
Actual Price	\$38,455	\$43,170	\$40,770

Source: MotorTrend

Automotive Technology

Full Size Truck Comparison

Model	EPA MPG	Annual Gasoline (15k miles @ \$4/gal)	Price (MSRP)	Payback Period (Years)
F-Series	22.5	\$2,666	\$43,170	
Silverado	18	\$3,333	\$38,455	7.1
Ram	16	\$3,750	\$40,770	2.2

Automotive Technology

Factors Constraining Consumer Acceptance

- Total Cost of Ownership
- Infrastructure Development
- Vehicle Utility
- Competing Technologies

Automotive Technology

Pre-owned Vehicle Market



Automotive Technology

Pre-owned Vehicle Market



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Thank You

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