



GESAMTVERBAND DER
ALUMINIUMINDUSTRIE e.V.

Outlook on the German Market and the Structural Changes within the Auto Sector

Marius Baader
MD GDA

Istanbul

Oct.
2019



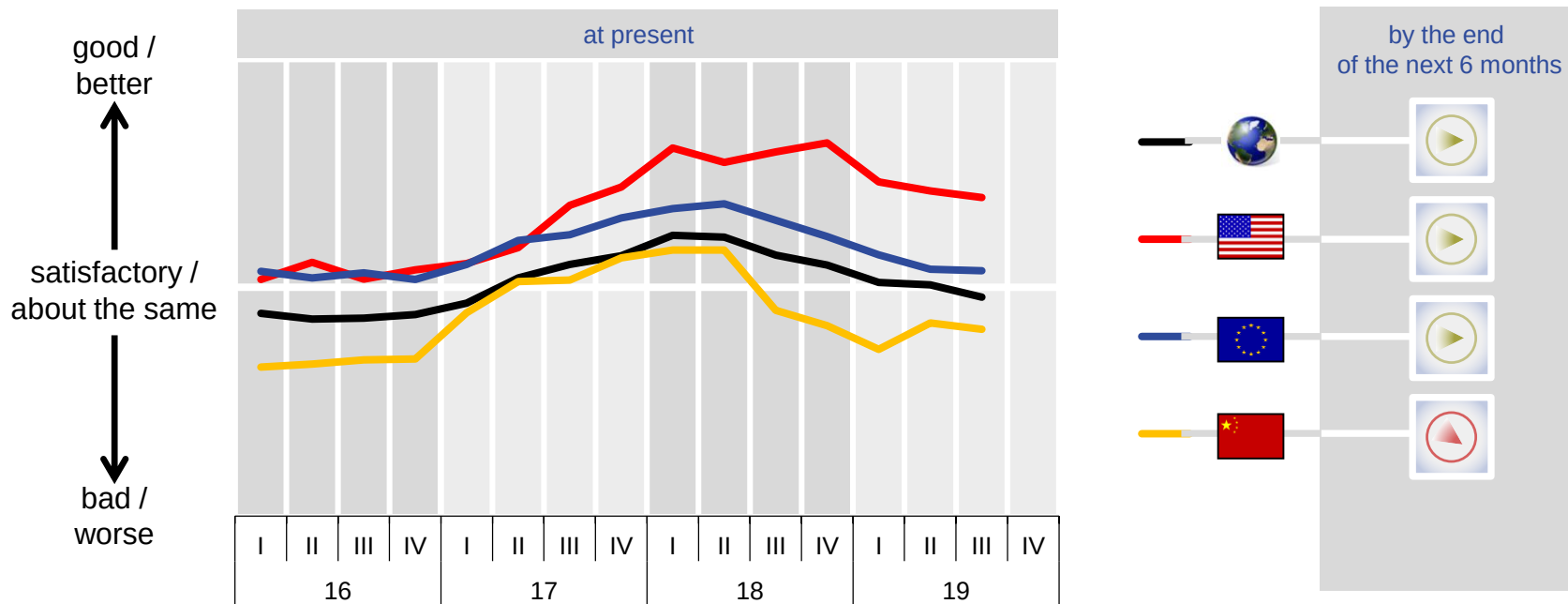


Agenda

- I. Overall Economic Situation
- II. Major Aluminium Market Performance
- III. The Auto and its Potential for Disruption!

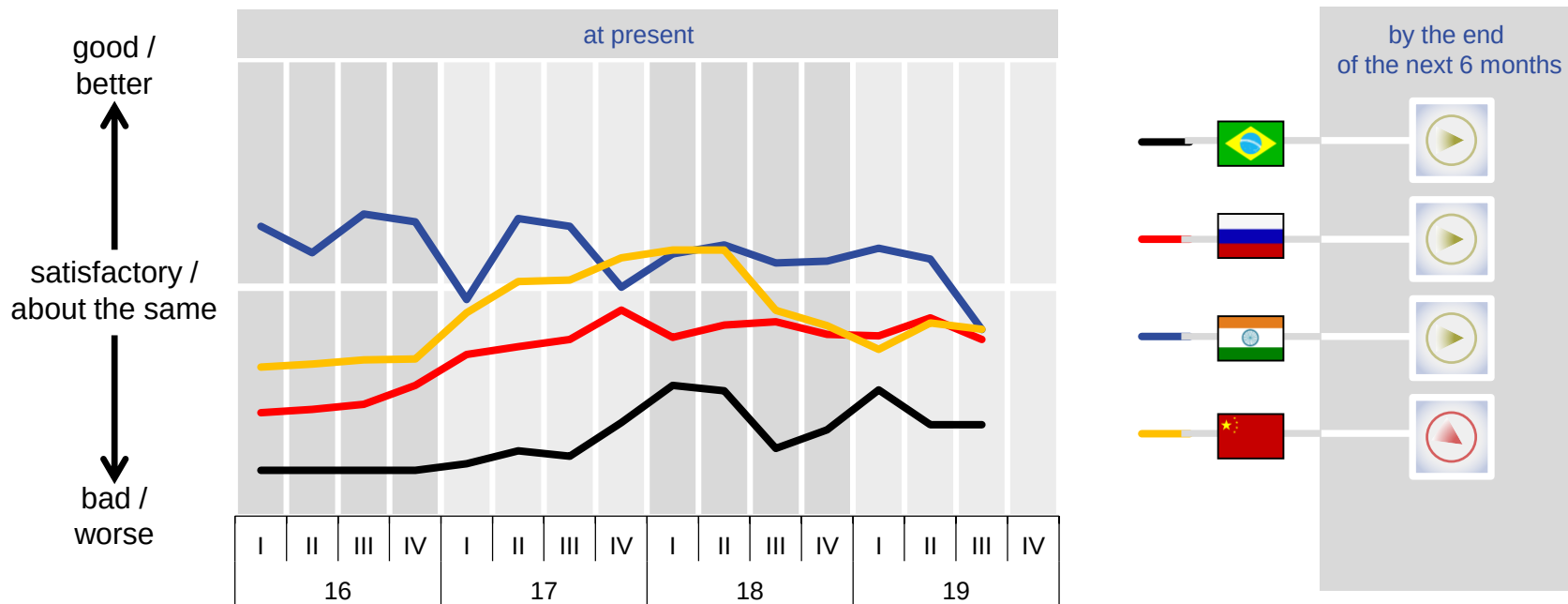
I. ifo Economic Climate for World Regions

Assessment of economic situation



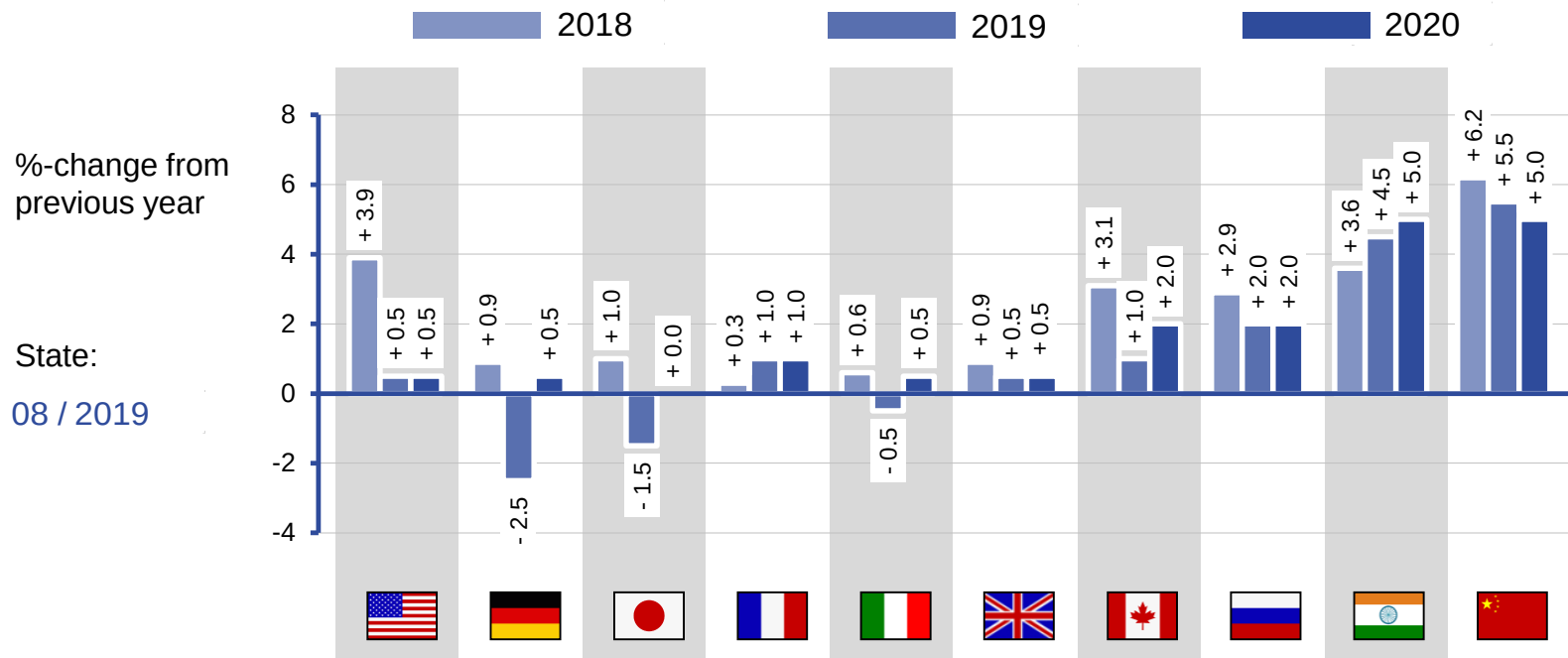
I. ifo Economic Climate for the BRIC economies

Assessment of economic situation



I. Macroeconomic framework

Industrial Production



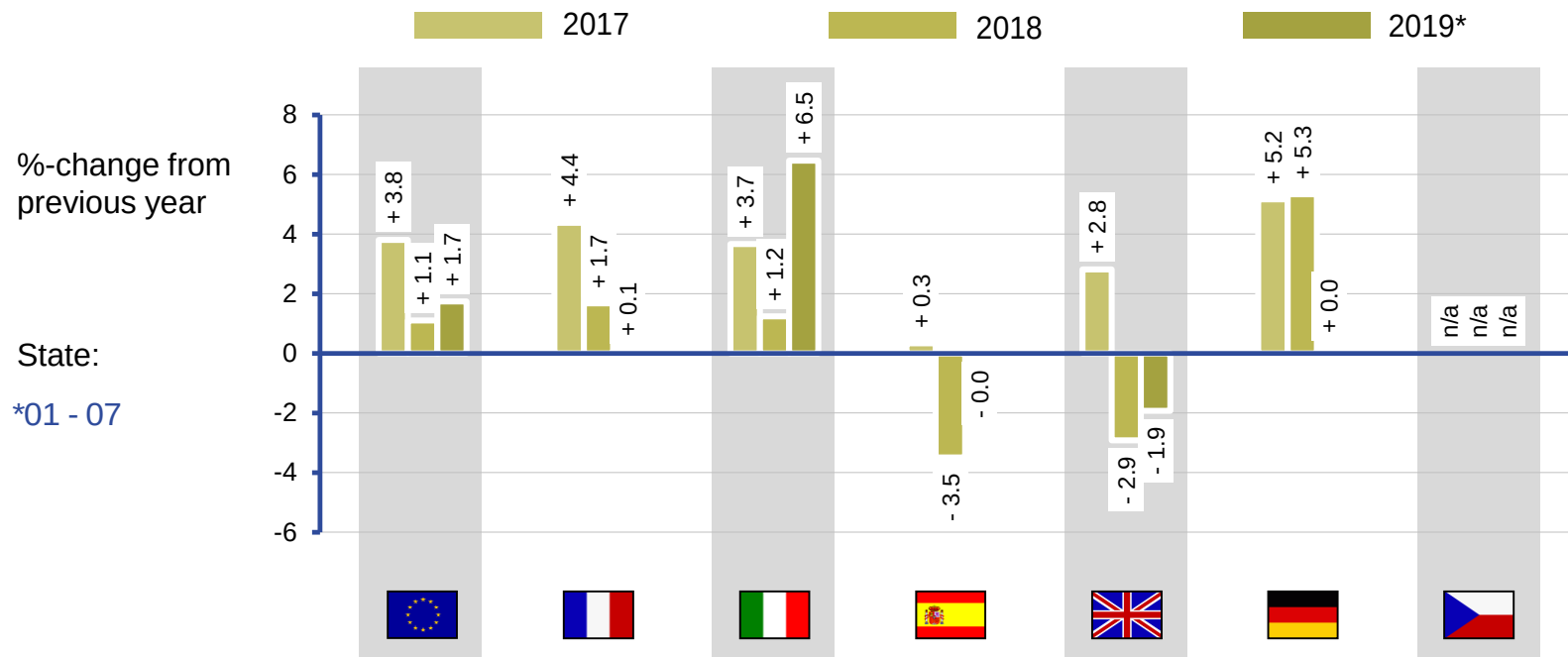


Agenda

- I. Overall Economic Situation
- II. Major Aluminium Market Performance
- III. The Auto and its Potential for Disruption!

II. Manufacture of air and spacecraft

Production (seasonally and calendar adjusted)

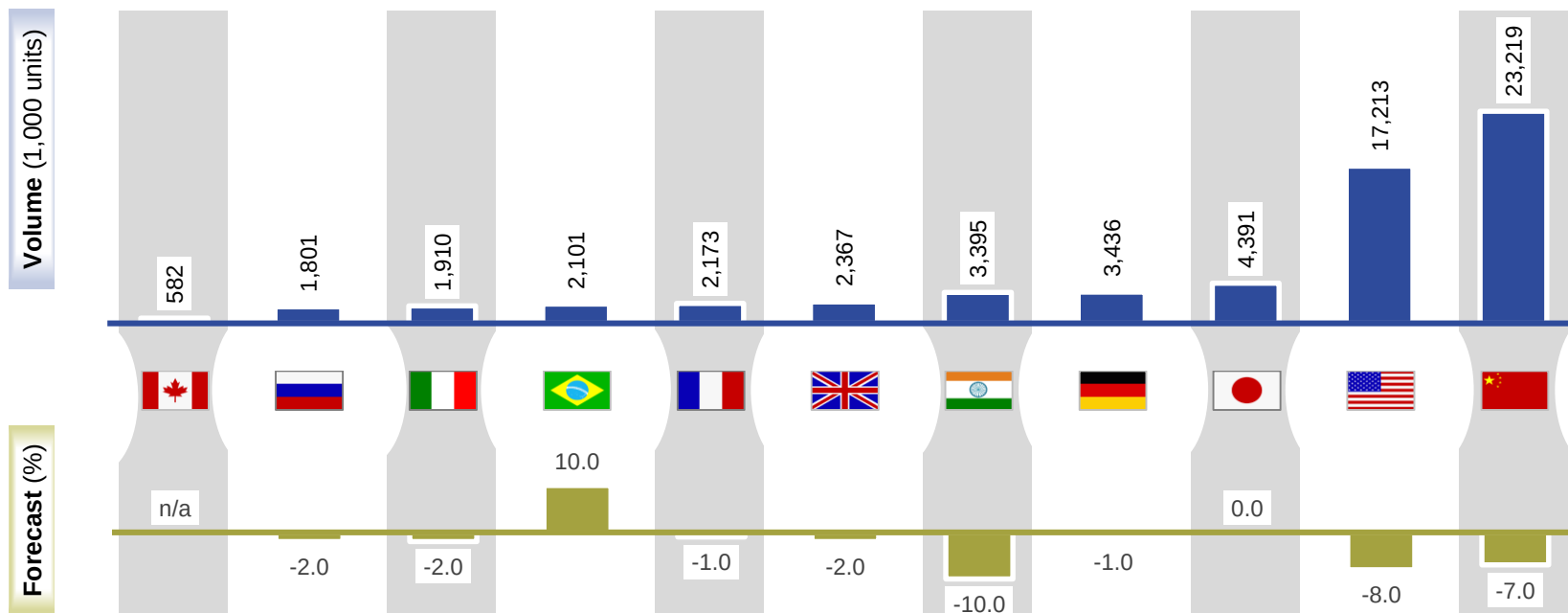


State:

*01 - 07

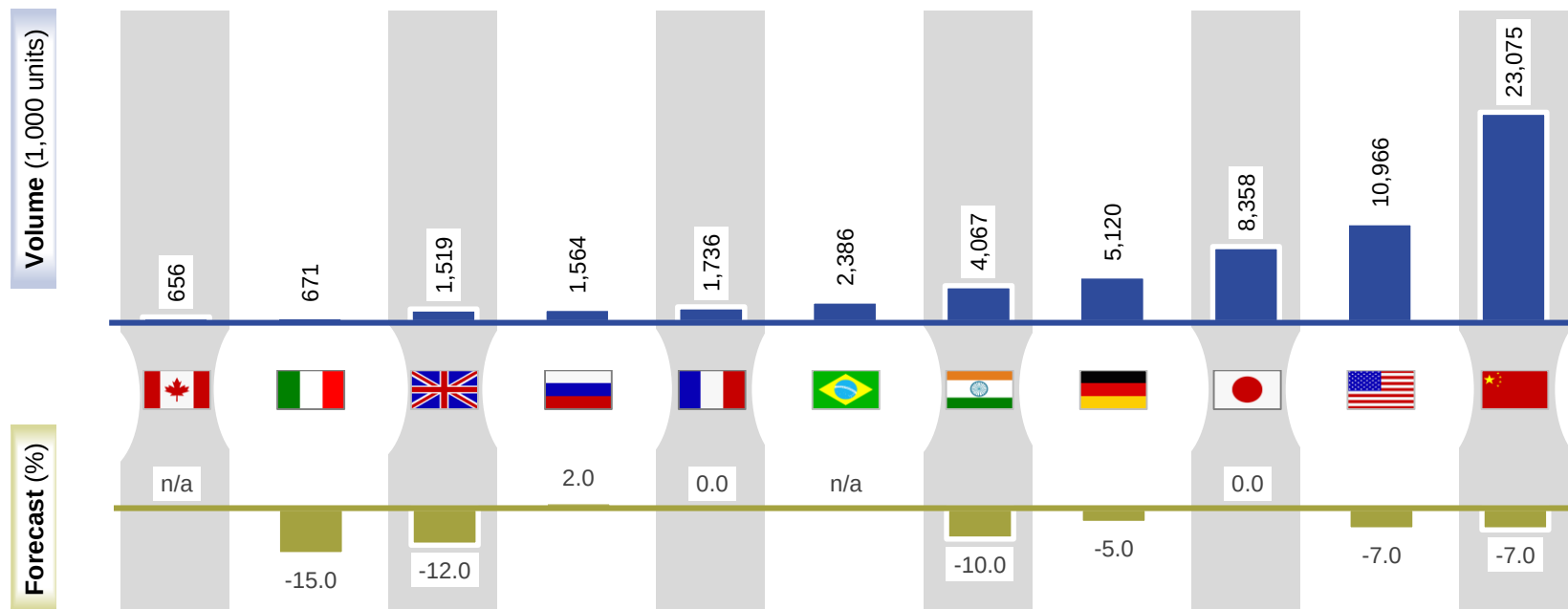
II. Passenger Cars | New Car Registrations | Forecast 2019

2018



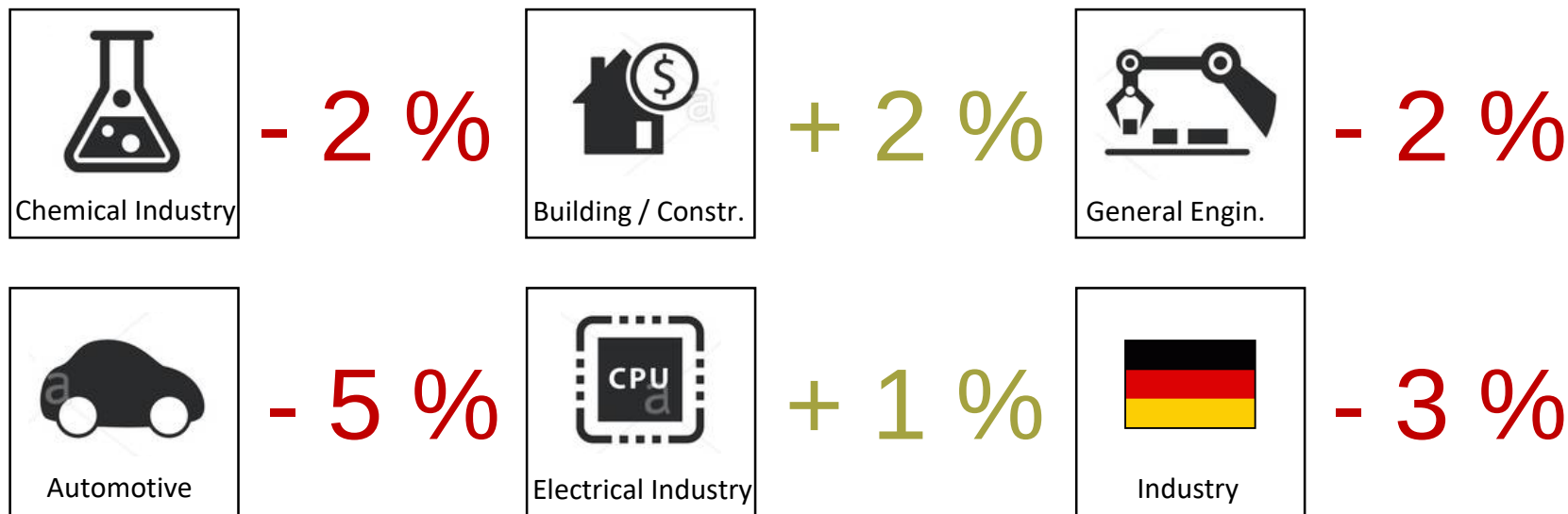
II. Passenger Cars | Production | Forecast 2019

2018



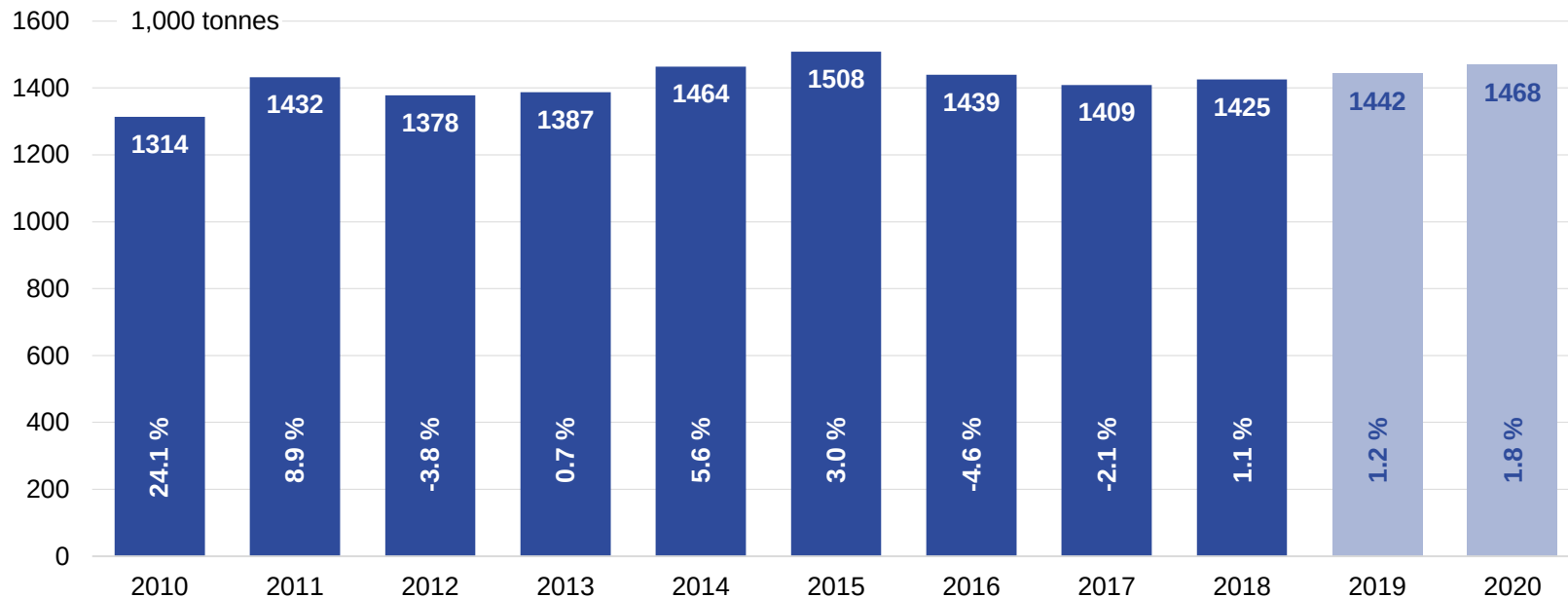
II. Yesterday export world champion and today the sick man of Europe?

Industry forecasts for Germany predominantly negative



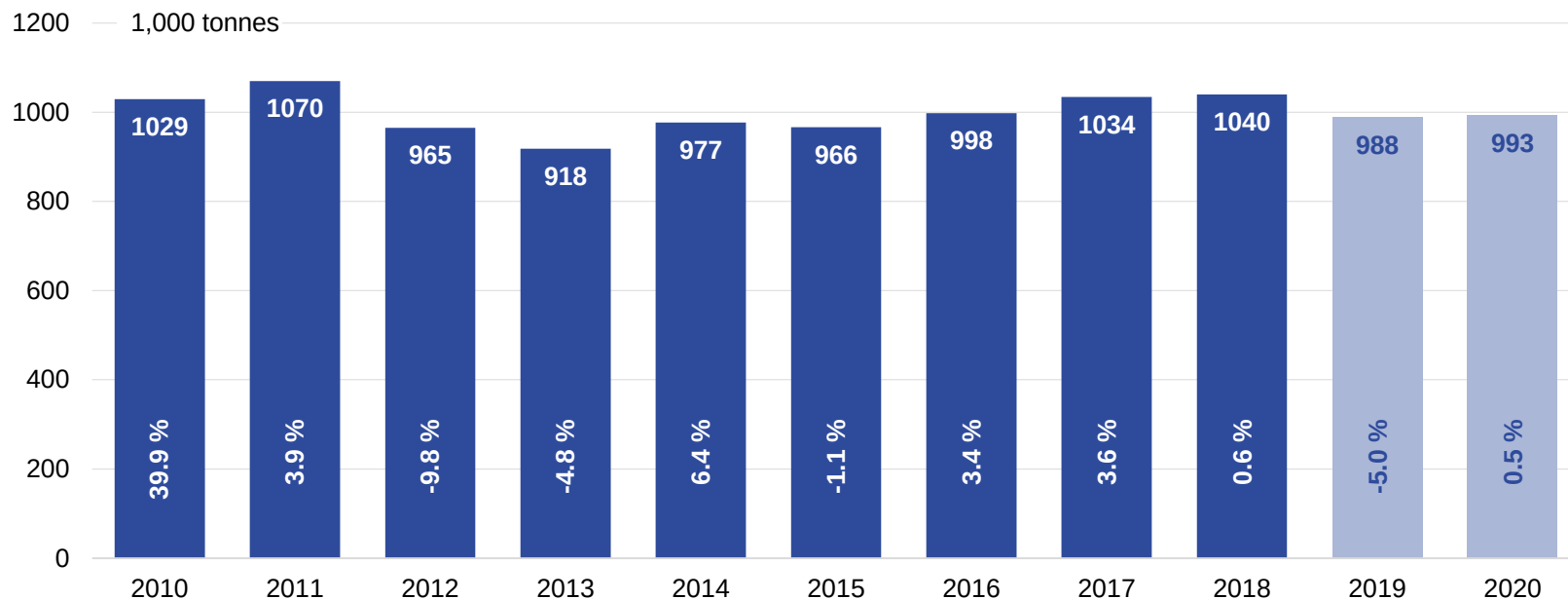
II. Flat rolled products

Consumption Germany



II. Extruded products

Consumption Germany

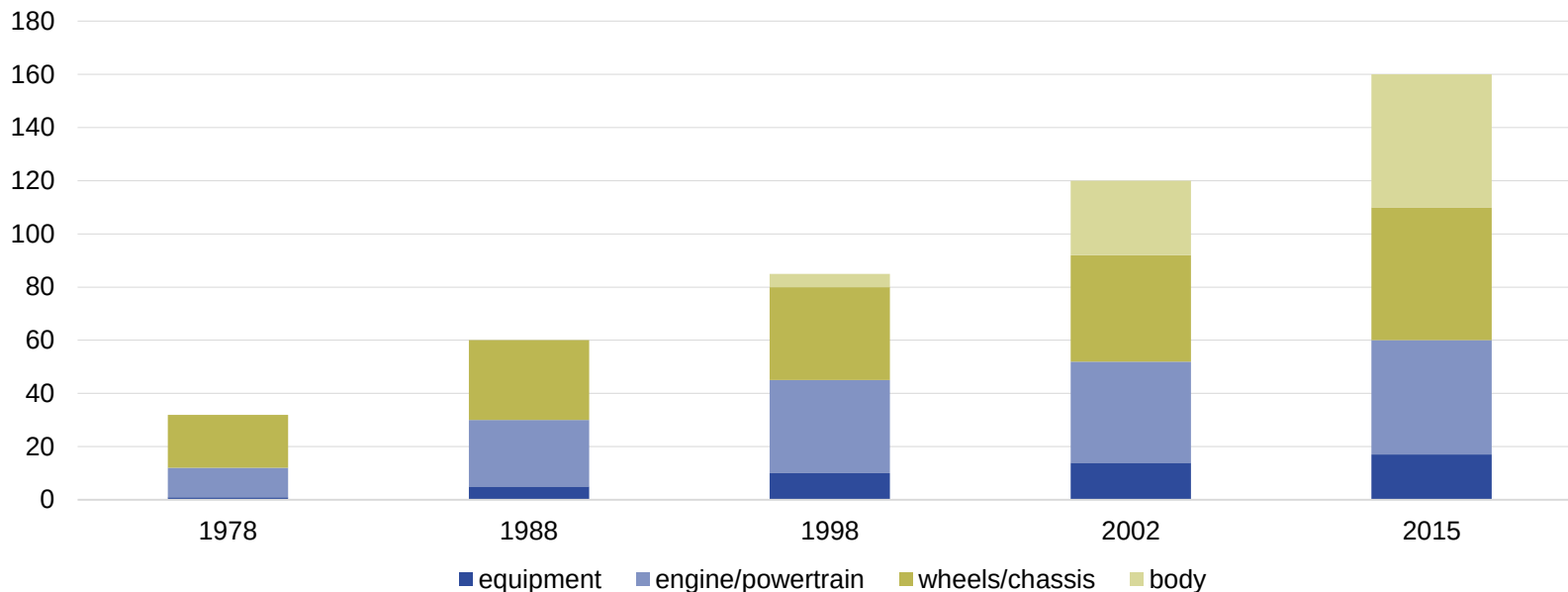




Agenda

- I. Overall Economic Situation
- II. Major Aluminium Market Performance
- III. The Auto and its Potential for Disruption!

III. The Automotive Industry – A Driver for Aluminium Growth



III. The Global Megatrends that might affect us

Urbanization



Connectivity



Individuality



Neo-Ecology



Globalization



Mobility



III. The Difference between Disruption and Incremental Innovation



1800'



1900'



2000'



Founded 2006

The consumer's desire to listen to music remains the same – the carrier changes.
And with it, industries disappear!

III. Disruption and Incremental Innovation



The consumer's desire to go from A to B – did the carrier change dramatically?

III. Chances ahead!

Past Truth:

- Automotive demand: A strong growth story in the past!
- Business model: Based on EoS!
- Increasing aluminium content: 😊

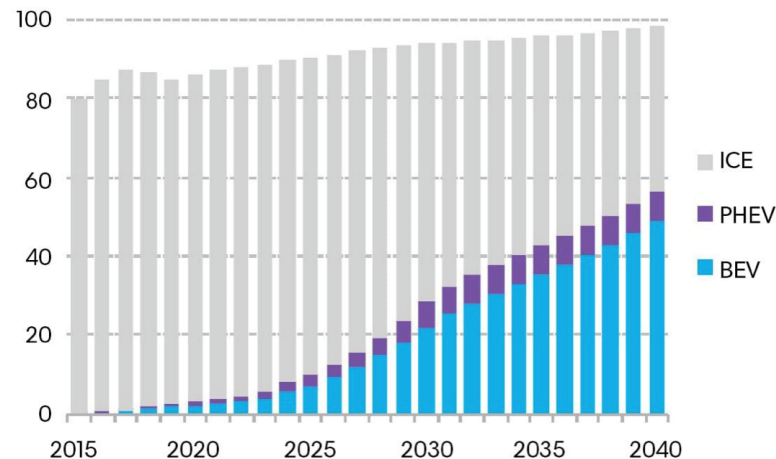
Future Scenario:

- Technology will change quickly and strongly
- Demand might flatten out
- Attractiveness no longer a given
- Political pressure increases almost everywhere

No need to panic! But a good start to expand thoughts...

Global long-term passenger vehicle sales by drivetrain

Million vehicles



Source: BloombergNEF

III. Chances ahead!



Uber Lyft

EUROPEAN ALUMINIUM
CONGRESS | 2019

25–26 November 2019
MARITIM Hotel | Düsseldorf

ALUMINIUM and Mobility

ALUMINIUM and Mobility

Day 1: Keynotes / Paneldiscussion

- Dr. Ing. Hinrich Mählmann, CEO OTTO FUCHS
- Malwina Novakoska-Ketterle, European Commission
- Dr. Tom Kirschbaum, Founder & CEO door2door
- Josef Schön, Audi AG
- Prof. Christoph Wagener, VP R&D Kirchhoff Automotive
- Dr. Blanka Lenczowski, Senior Expert Materials, Airbus



Day 2: Parallel Sessions





ALUMINIUM and Mobility

Topics of Day 2 Sessions:

Aluminium
Markets

Digital and Additive
Manufacturing

Energy
e-Mobility

Recycling
Technologies

Surface

Joining

Processes

Automotive
Transport

Forming
Heat Treatment



,...‘cause every little thing gonna be alright...

Cars



Electric Cars



Uber



Robot Cars





GESAMTVERBAND DER
ALUMINIUMINDUSTRIE e.V.

Thank you for your attention!

Gesamtverband der Aluminiumindustrie e.V.
Fritz-Vomfelde-Straße 30
40547 Düsseldorf

Tel. 0211 – 47 96 – 118
information@aluinfo.de
www.aluinfo.de



www.facebook.com/aluverband



<http://tinyurl.com/GDA-YouTube>



www.twitter.com/aluverband



www.instagram.com/aluverband



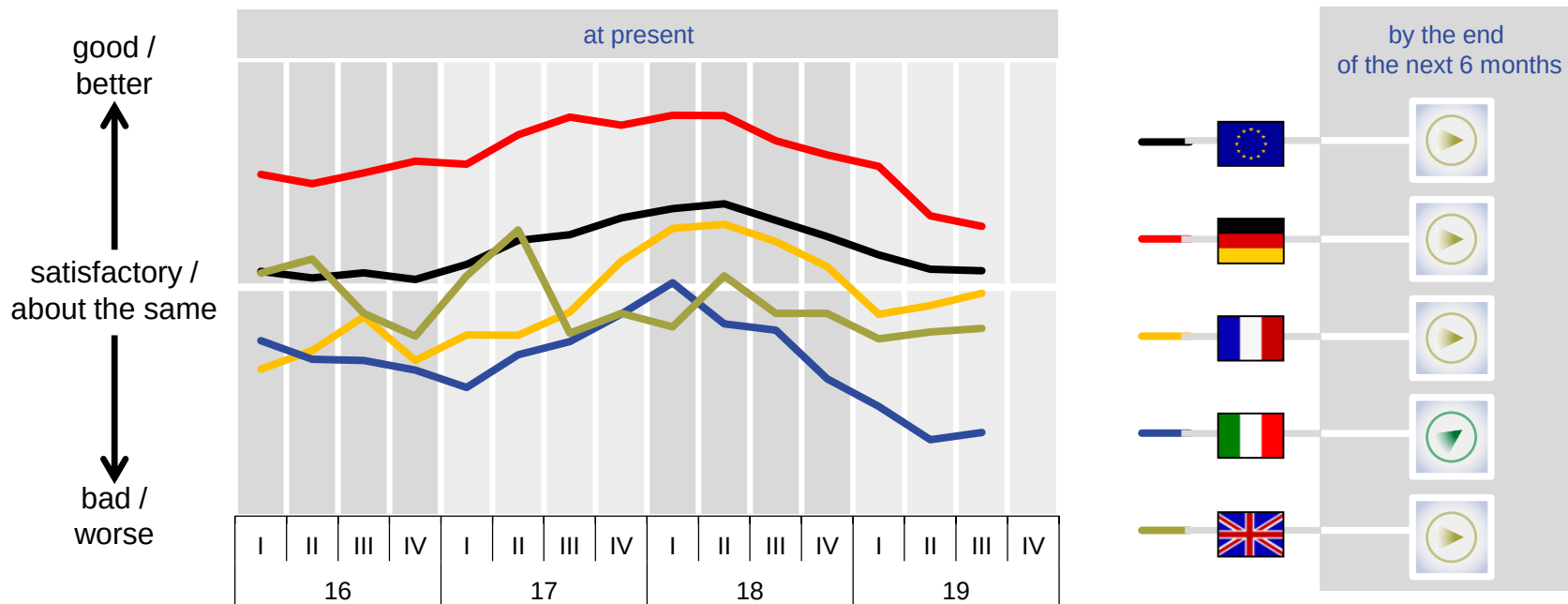
www.xing.to/aluverband



www.linkedin.com/company/aluverband

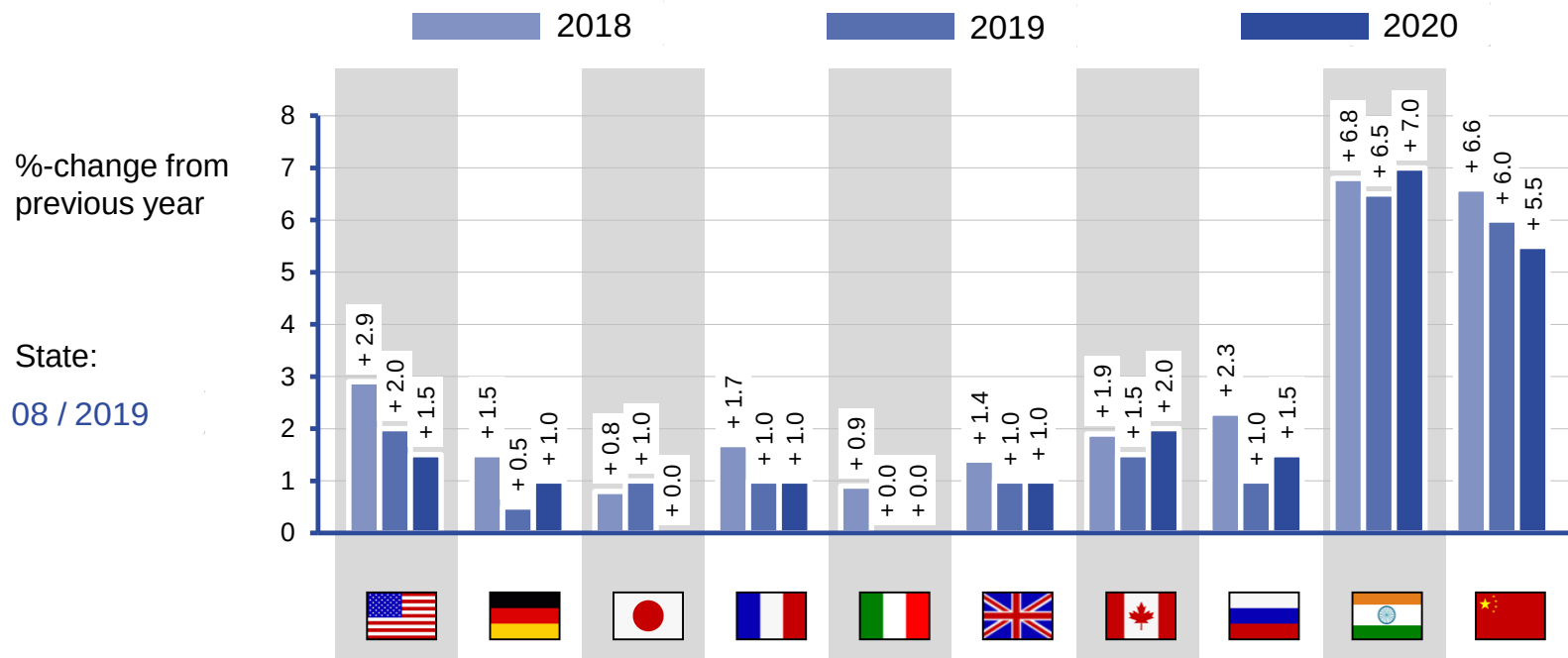
I. ifo Economic Climate for Europe

Assessment of economic situation

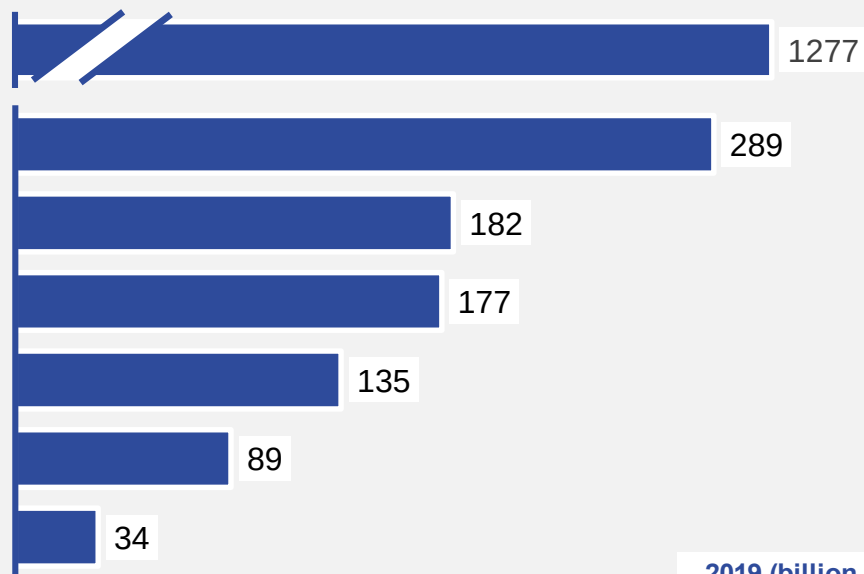


I. Macroeconomic framework

GDP



Construction Sector Output Building



2019 (billion €)

2019

+ 1,3 %

+ 0,4 %

- 0,4 %

- 0,1 %

+ 1,6 %

+ 6,0 %

+ 1,8 %

2020

+ 1,1 %

- 0,7 %

+ 1,2 %

+ 0,5 %

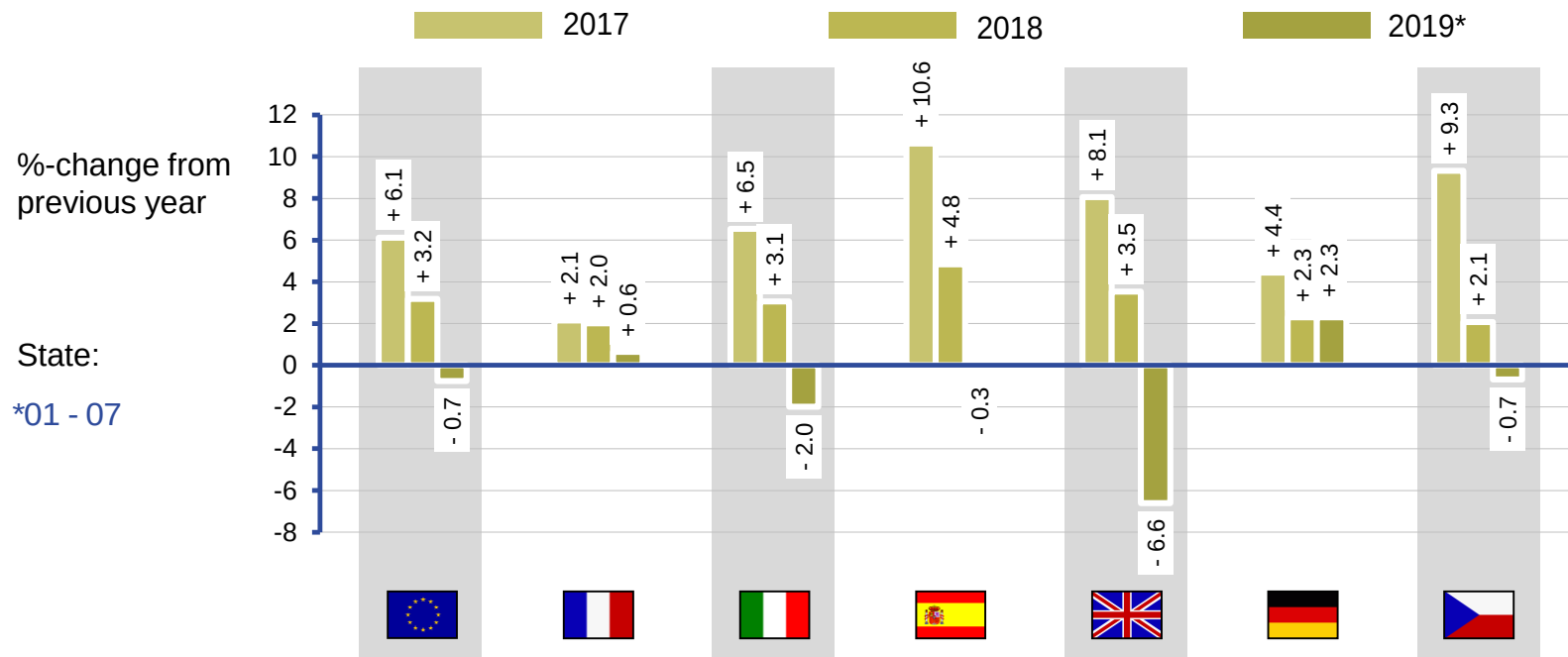
+ 1,4 %

+ 4,3 %

+ 0,9 %

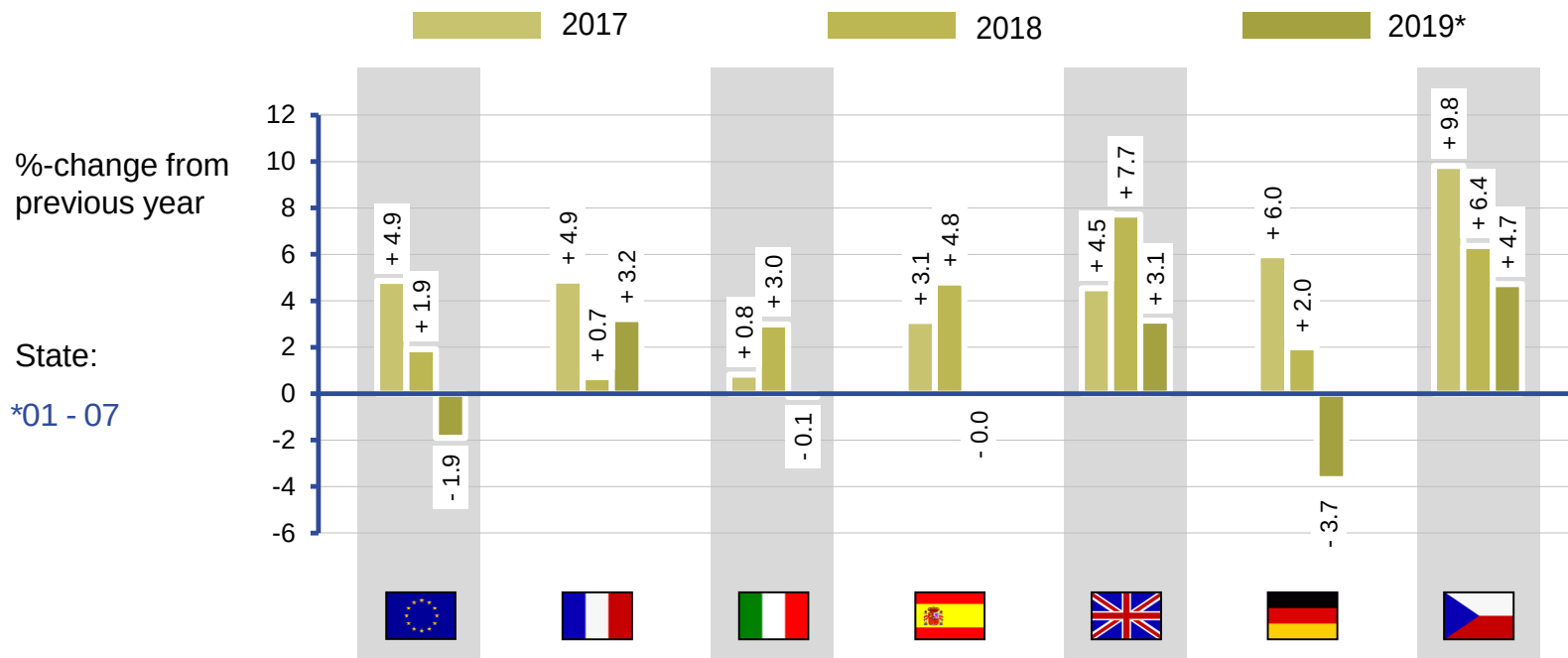
General Engineering

Production (seasonally and calendar adjusted)



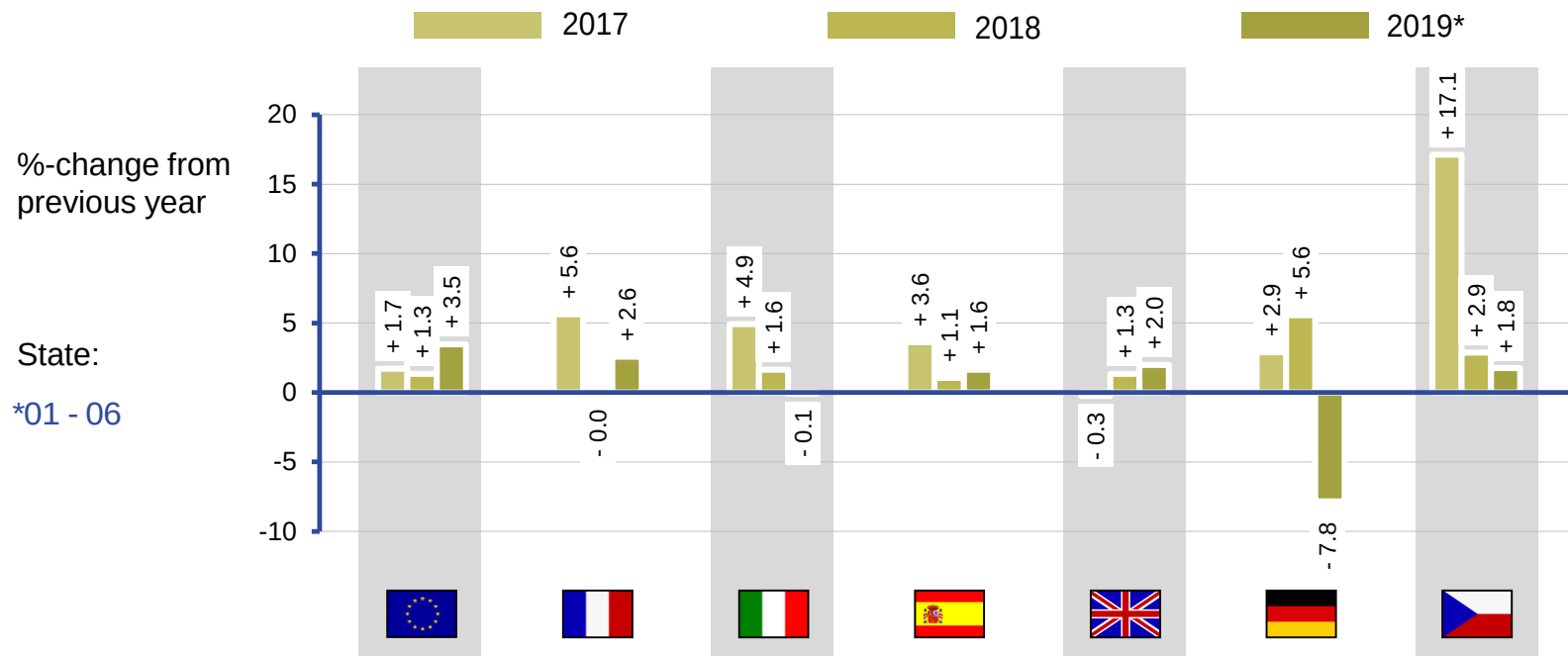
Electrical Engineering

Production (seasonally and calendar adjusted)



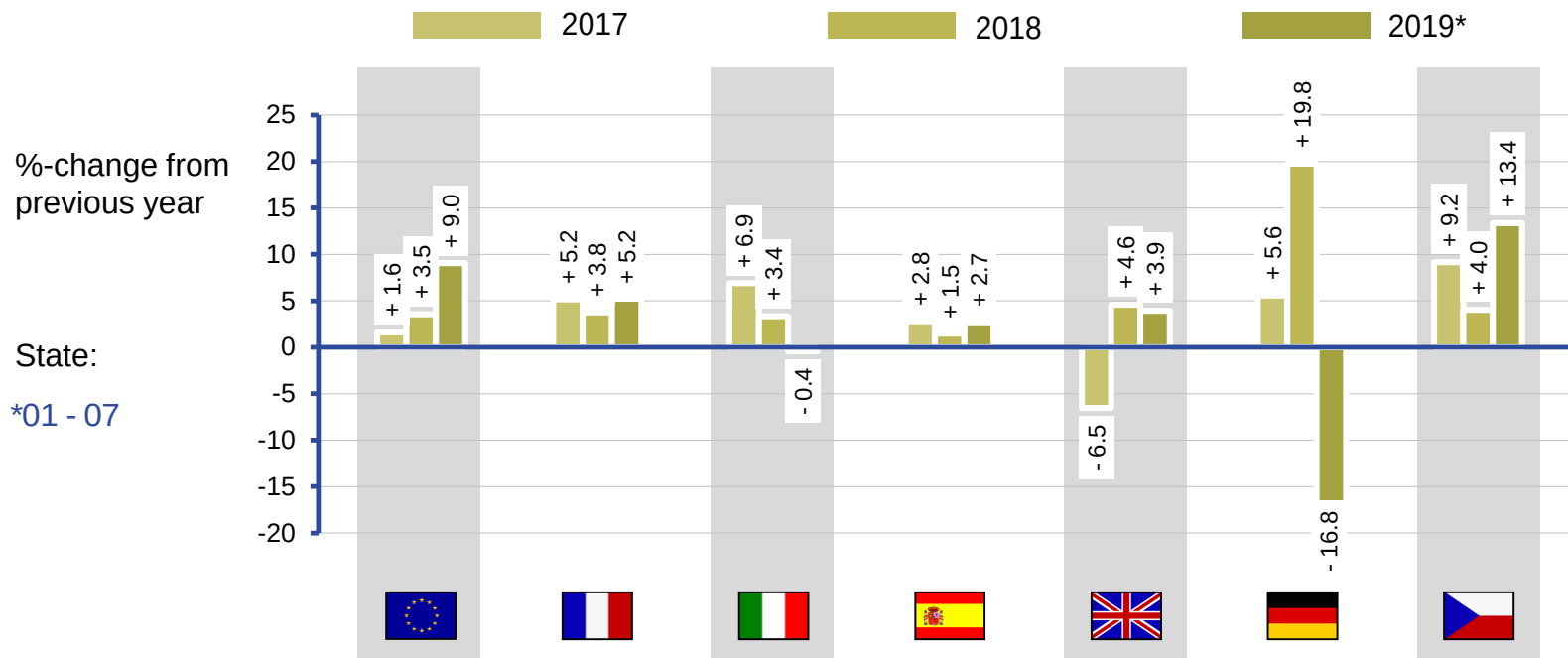
Chemicals and pharmaceuticals

Production (seasonally and calendar adjusted)



Pharmaceutical products and preparations

Production (seasonally and calendar adjusted)



State:

*01 - 07