



***The Auto Industry After the Fall:  
Navigating the Path to Sales Growth and Profitable Recovery***  
An iSuppli European Briefing

Presented by iSuppli Corporation  
19 May 2009 – Frankfurt, Germany

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Navigating the Path to Sales Growth and Profitable Recovery***  
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Set against the backdrop of a macroeconomic recession and steeply declining sales of passenger vehicles in the latter part of 2008 and into 2009, the automotive industry is in dire straits. The decline in 2008/2009 has dramatic implications for the supply chain and despite expectations for an improving situation going forward from 2010, conditions in the global automotive sector will remain very challenging over the next five years.

Please join iSuppli analysts and executives in Frankfurt on 19 May, 2009 for an in-depth event examining different short-term and long-term recovery scenarios and their implications for technology development and system design.

What role will technology play in the anticipated recovery? Will cars see more or less technology content? How will technology be leveraged by car makers and their suppliers to satisfy mandates, satisfy customers and lift the industry out of the sales ditch? Find out from the iSuppli experts such as Phil Magney – Vice President, Dr. Egil Juliussen – Director and Research Fellow, and analysts Richard Dixon, Jérémie Bouchaud and Richard Robinson.

***Time, Location and Fee***

- 19 May 2009
- Frankfurt, Germany – [Sheraton Frankfurt Hotel & Towers, Conference Center](#)
- € 199 Per Person | € 499 Per Company (up to 10 attendees)
- [Registration](#)

***Agenda***

**9:00AM**      **Registration**

**9:25AM**      **Opening Remarks  
*Welcome and Introduction***

*Robert Braverman*

*Vice President and Managing Director, iSuppli Europe*

**9:30AM**      **The Road Ahead  
*Automotive Infotainment and Telematic Trends***

*Egil Juliussen, PhD*

*Principal Analyst and Fellow, Automotive Research*

Auto sales and production seem to have fallen off a cliff. Auto manufacturers and suppliers are reeling from this sudden and unexpected recession. How bad is it and when will there be improvements? These are topics to explore in this session.

- Current auto sales trends
- Automotive sales forecasts
- Telematics trends and outlook

**10:00AM      Infotainment Systems and Semiconductor Trends*****Where the Rubber Meets the Road****Richard Robinson**Principal Analyst, Automotive*

With worldwide car production forecast to drop by 25% in 2009, vehicle OEMs are in shock, and looking to their supply chain to shoulder the burden of higher production costs per unit. However some infotainment segments are showing remarkable resilience to the declines in vehicle production.

This segment lifts the lid on the strong growth prospects for both systems and semiconductor vendors as the market recovers from the slump of 2009. We put a local perspective on the global issues faced by vehicle OEMs as they use Infotainment electronics as a lever, to bring buyers back to the showroom.

- Navigation device trends and outlook
- Head-unit trends and outlook
- Digital terrestrial radio outlook
- Semiconductor market impact

**11:30AM      Coffee Break****12:00PM      Road Warrior*****Human Machine Interface (HMI)****Egil Juliussen, PhD**Principal Analyst and Fellow, Automotive Research*

The proliferation of electronics systems that all need a user interface is expanding and complicating the auto's human-machine interface. New HMI systems are emerging and creates opportunity for capturing the new car buyers that have grown up in the age of PCs, mobile phones, iPods and iPhones. Multifunction displays, speech, touch and other technologies are here to stay and to expand.

- HMI availability trends
- Displays trends and outlook
- Voice and other HMI trends
- HMI technology forecasts

**12:30PM      Location Based Services (LBS) – The Road Less Travelled?***Egil Juliussen, PhD**Principal Analyst and Fellow, Automotive Research*

The connected car is emerging rapidly and content service opportunities are on the horizon. Telematics services are already established in the USA. Navigation services are also established, but other LBS related services show promise. What are the opportunities and how will they be linked to car?

- Wireless technologies and roadmap
- Connected car and applications
- Navigation and telematics service outlook

**1:15PM**      **Lunch**

**2:15PM**      **Road Work**  
***Sensors as an Enabling Technology***

*J r mie Bouchaud*

*Director and Principal Analyst, MEMS*

*Richard Dixon*

*Senior Analyst, MEMS*

#### Safety

Safety systems like anti-blocking systems (ABS), its more sophisticated cousin the Electronic Stability Control (ESC) system and also tire pressure monitors are enabled by MEMS sensors. Without these MEMS sensors - low g accelerometers to measure lateral slip, gyroscopes to determine and correct trajectory or high pressure sensors to operate the braking modulator – ESC systems would not exist, or at least be too bulky and expensive. Meanwhile, high g accelerometers and pressure sensors control the airbags for front and side collisions, respectively.

This talk focuses on:

- A review of mandates in place today and those upcoming
- The impact on the mandates on the technology, architectures and supply chain as tier 1s attempt to slash the costs of sophisticated systems that are no longer optional extras.
- Pricing issues and 5-year market development.

#### Power Train

The power train is home to many kinds of sensors. This talk reviews emission regulations impacting the drive train in today's car and focuses on applications and growing markets for MEMS pressure and magnetic sensors, as follows:

- Air pressure sensors in the manifold intake (MAP and BAP), common fuel rail for gasoline and diesel direct injection engines, transmission, diesel particle filter, etc
- Pricing and 5-year market development.
- Applications for magnetic sensors in crankshaft position and camshaft phase and position, gear switch position, throttle position....

#### Body and Infotainment

Under the umbrella of body and infotainment iSuppli includes many applications for magnetic and MEMS sensors or switches, encompassing:

- On board GPS navigation dead-reckoning aids including gyroscopes and accelerometers
- Pricing and 5-year market development.
- Magnetic sensors for acceleration pedal position, electronic parking brake, steering wheel angle...
- Switches for seat belt presence, sliding sun-roof position, brushless DC motors for fans, windows, etc

**3:00PM**      **Watching the Road**  
***Advanced Driver Assist and Safety Systems (ADAS)***  
*Egil Juliussen, PhD*  
*Principal Analyst and Fellow, Automotive Research*

Driver assist systems are one of the few bright spots in this recession. The take-up rates of most systems continue to increase. New systems are emerging and more will follow. Society's ROI from ADAS related technologies are very good, which makes mandates good policy. Mandates are already making an impact and additional mandates are likely.

- Driver assist availability trends
- ADAS Market Trends and forecasts
- V2V and V2I outlook

**3:45PM**      **The 2020 Digital Car**  
*Egil Juliussen, PhD*  
*Principal Analyst and Fellow, Automotive Research*

The auto is half way through a transformation from analog control systems of the 1970s to the full digital and software controlled functionality of the future 2020 car.

- Digital car trends
- 2015-2020 market scenario
- 2020 perspectives

**4:15PM**      **Questions & Answers**

**4:30PM**      **Closing Remarks**  
*Robert Braverman*  
*Vice President and Managing Director, iSuppli Europe*