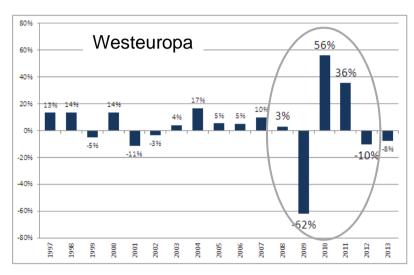
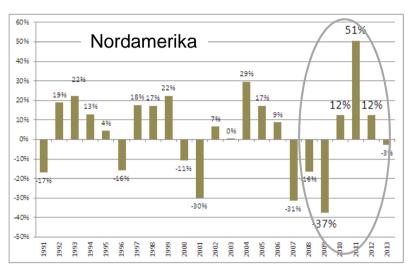
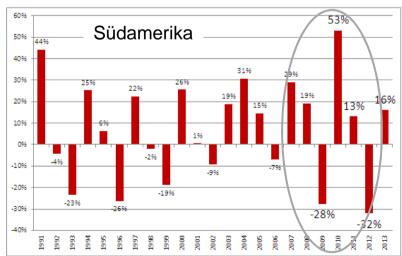


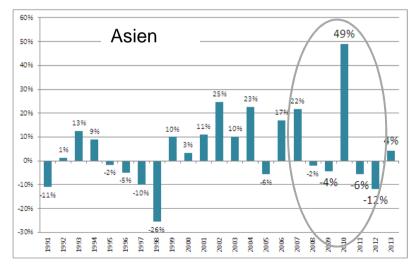


Volatilität in allen Märkten Beispiel: Nkw-Markt



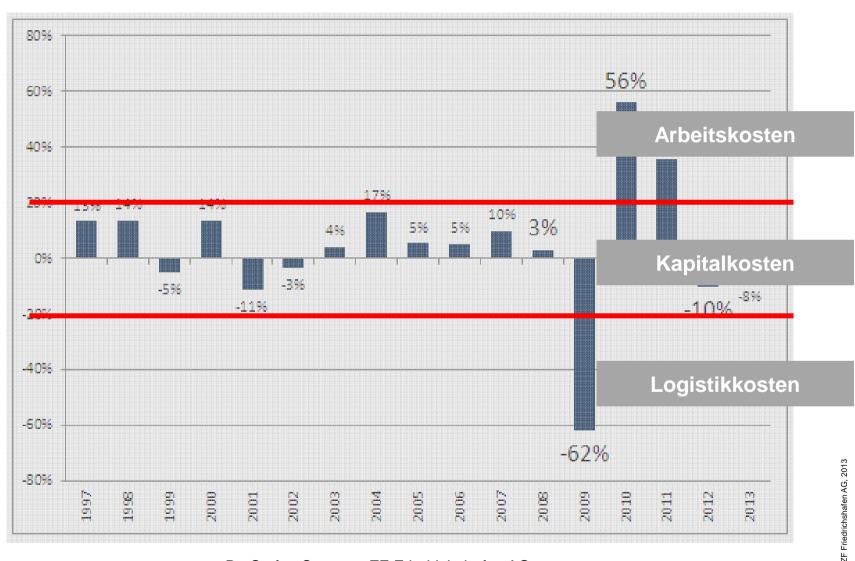






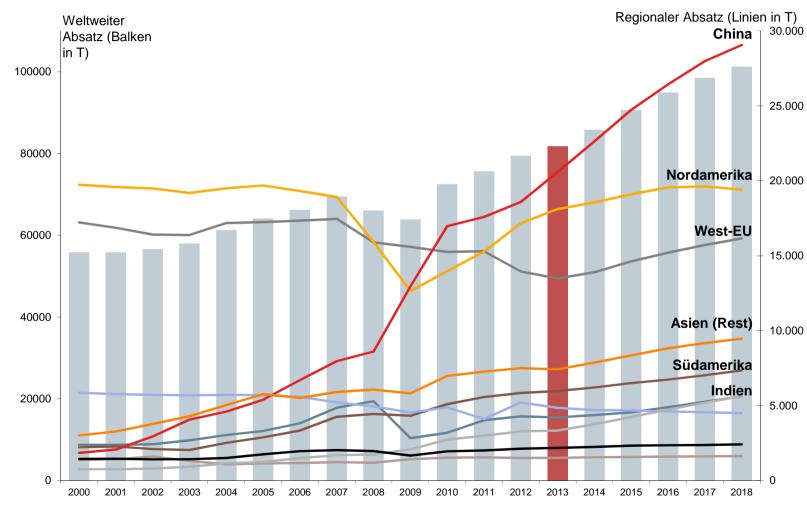


Flexibilität bedeutet wettbewerbsfähig agieren



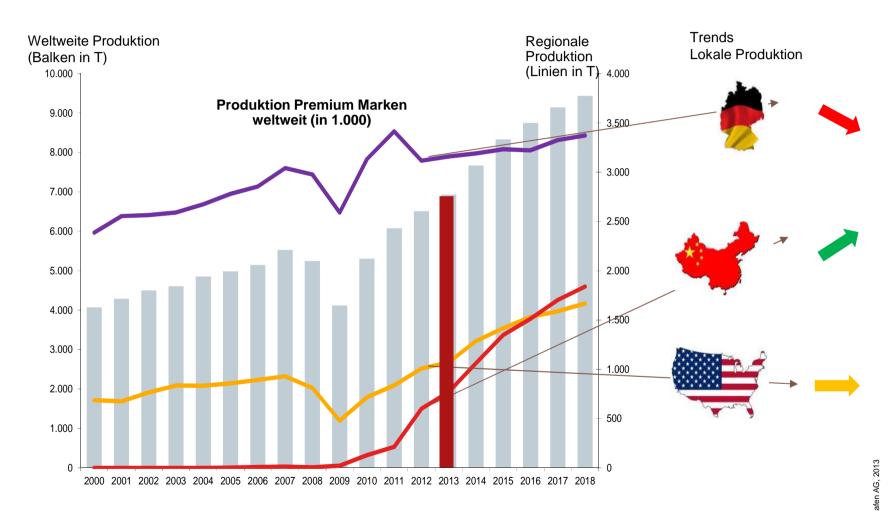


Weltweite Absatzentwicklung LCV Langfrist-Trend in Richtung "Emerging Countries"



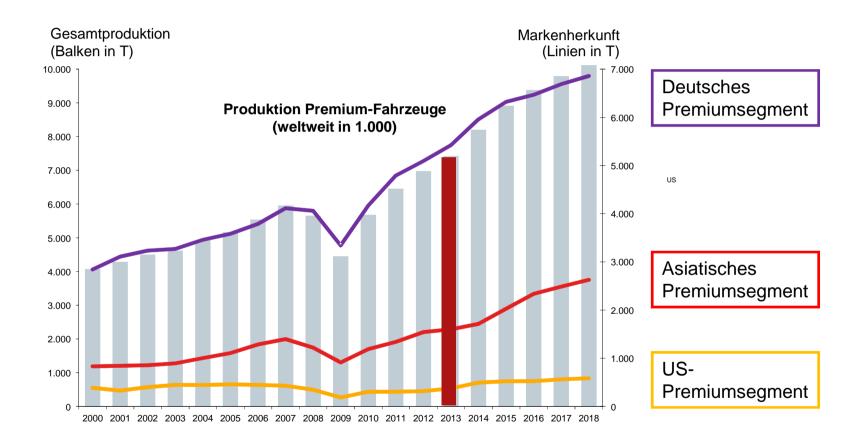


Produktionsentwicklung- und Anteile weltweit





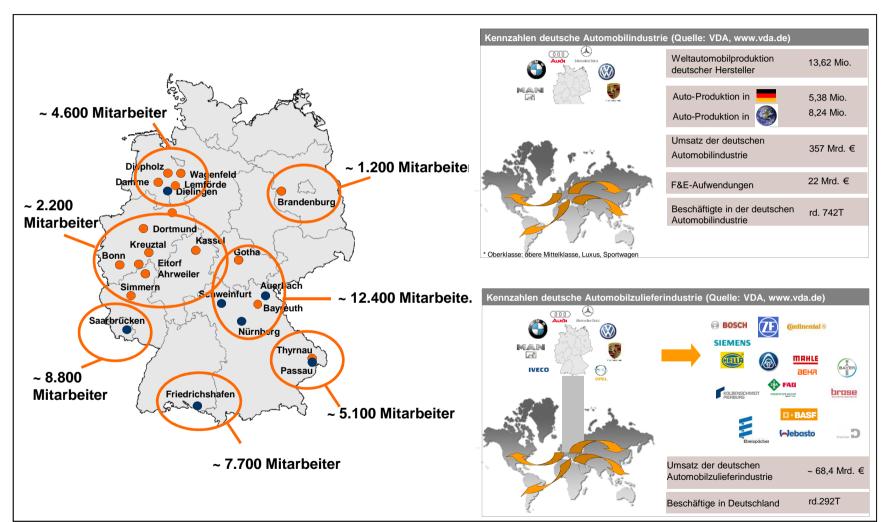
Entwicklung des Premiumsegments weltweit; >70% entsprechen deutschen Marken





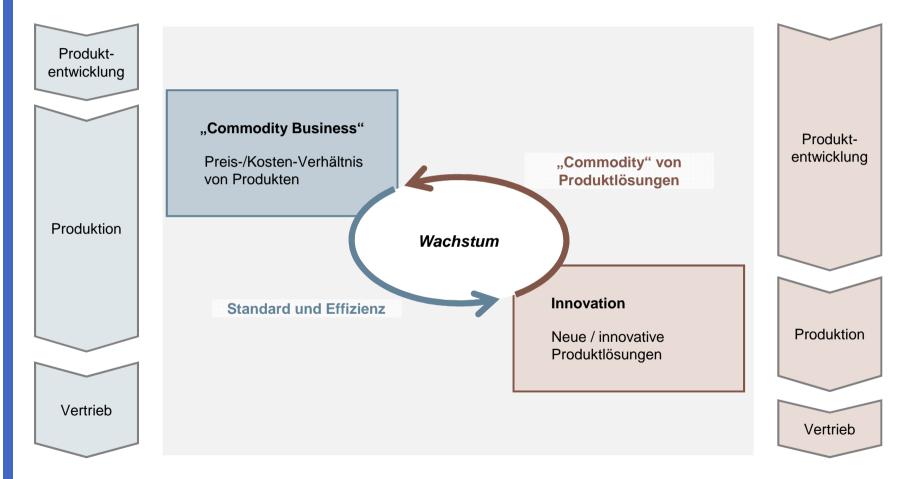


Fokus auf F&E in Deutschland ist weiterhin valide!



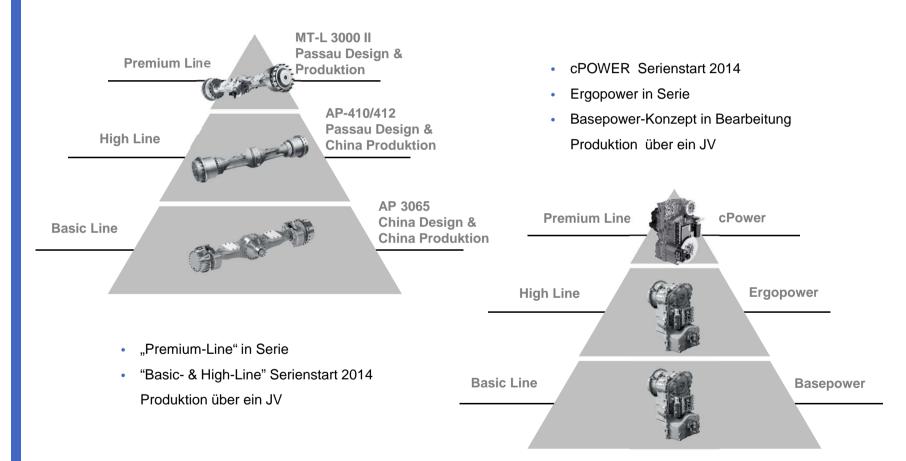


Innovationszyklus erfordert Technologieführung





Praxisbeispiel: D2M-Konzept für Achsen & Getriebe





drichshafen AG, 2013