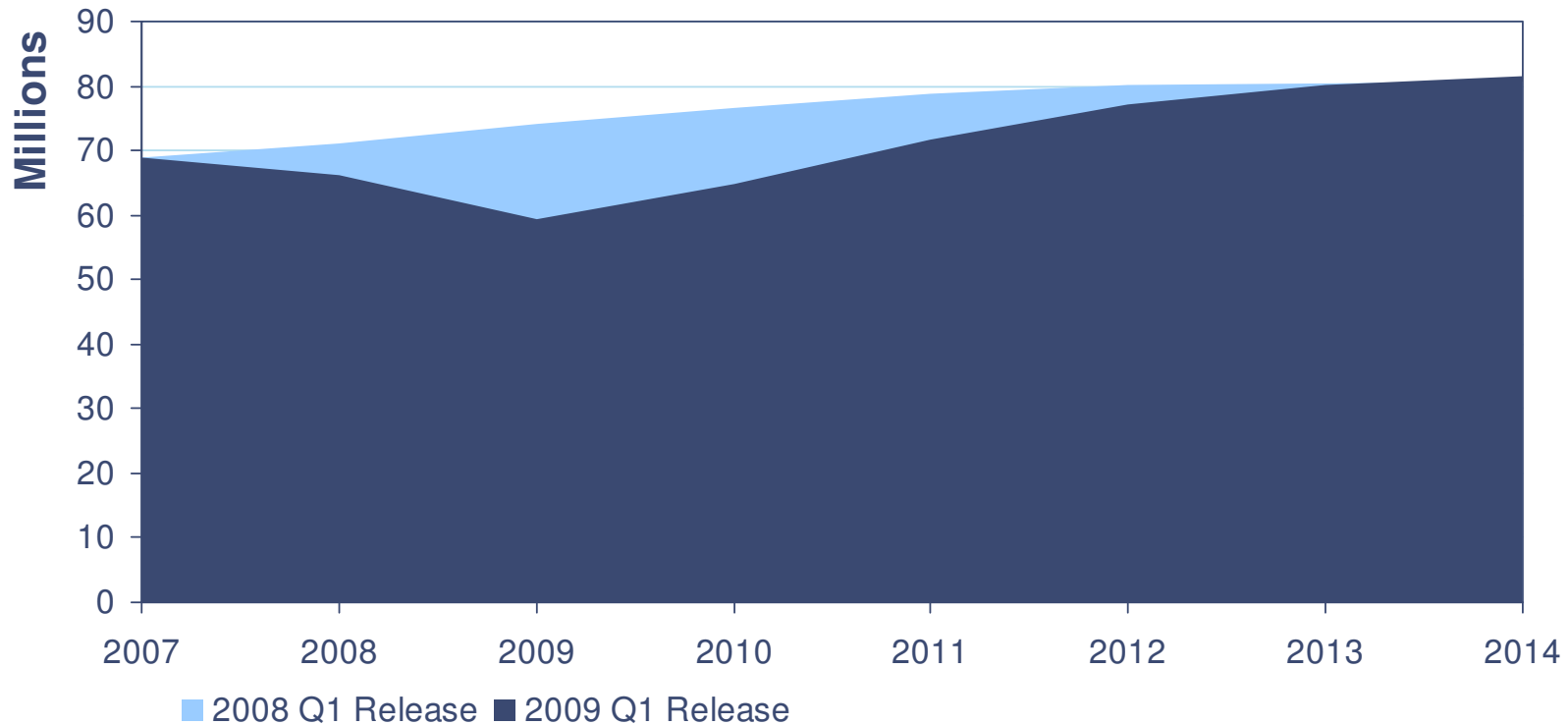


Welcome to the 2009 Automotive News World Congress



PricewaterhouseCoopers Automotive Institute AUTOFACTS® Light Truck and Vehicle Assembly Global Forecast



This year's forecast

Last year's forecast

Looking back at 2008

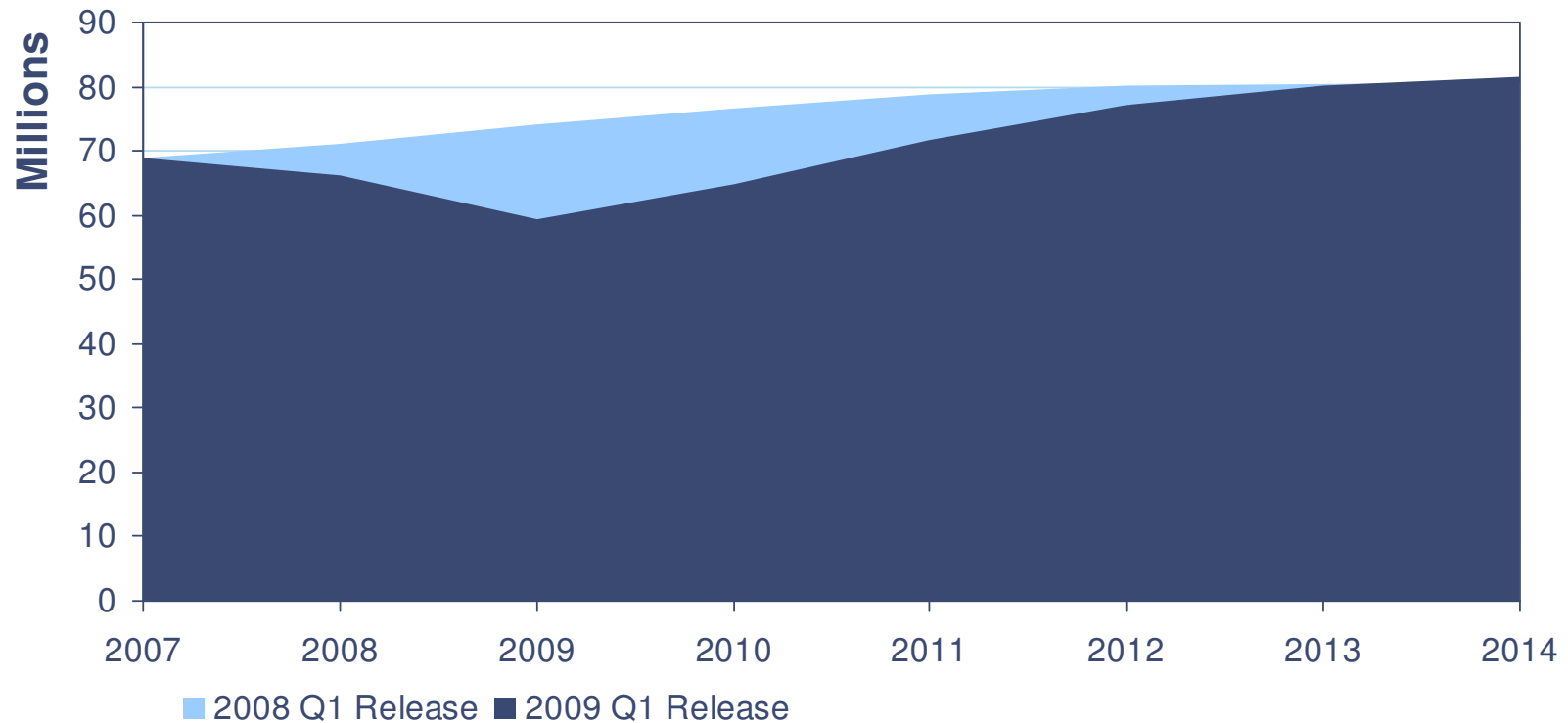
Steadily weakening
economy

Artificial consumer
credit

Financial Crisis



PricewaterhouseCoopers Automotive Institute AUTOFACTS® Light Truck and Vehicle Assembly Global Forecast



This year's forecast
Last year's forecast



What are the questions and trends that must be understood and managed in order for us to navigate through this time?

a **changing** business model



Consumer Expectations

Has the car has evolved from a mechanical device with electronic enablers to a electronic device with mechanical enablers?



What does the increased involvement by governments mean?



What does it mean when captive finance companies become banks?

What changes will the new administration make?

Will we have a cabinet level person with auto responsibility or accountability?

a changing business model



Do you have systemic supply chain risk management processes?

Are your forecasting capabilities world-class?

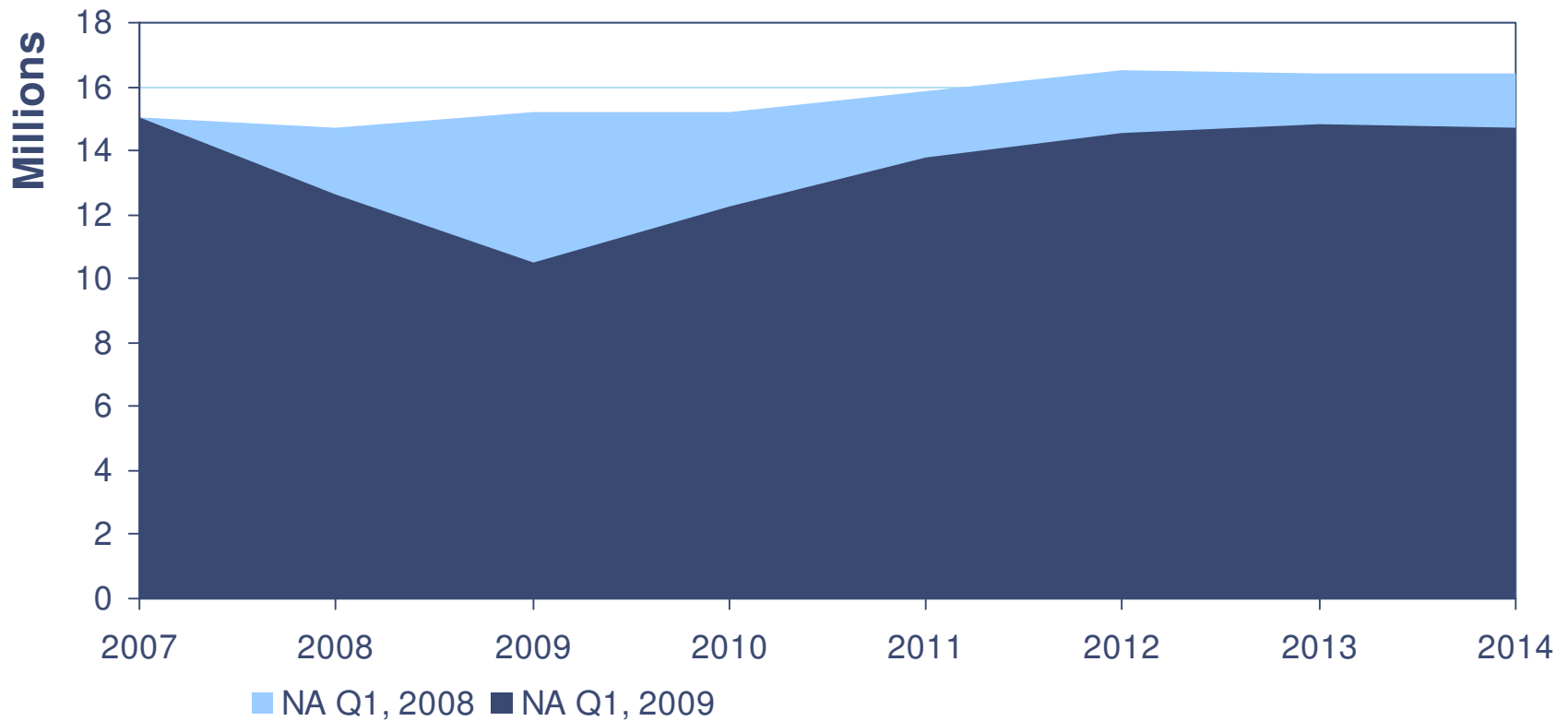
Do you have sustainable cost reduction strategies?

Will you have the right talent?

a changing business model



PricewaterhouseCoopers Automotive Institute AUTOFACTS® Light Truck and Vehicle Assembly NA Forecast



This year's forecast

Last year's forecast



Thank you.



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