



U.S. Automotive Research Capabilities

Studies/Services Available

- U.S. Hybrid and Electric Vehicle Sales Forecast and Report
- Global HEV and BEV Sales Forecast
- North American Engine and Transmission Forecast and Report
- Global Engine and Transmission Forecast
- U.S. Diesel Light Vehicle Sales Forecast
- Alternative Powertrain Study – Consumer Perspective
- IQS (Initial Quality Study)
- VDS (Vehicle Dependability Study)
- APEAL (Appearance, Performance, Execution and Layout)
- Vehicle Launch Index



Description of U.S. Hybrid and EV Report

- The U.S. Hybrid and Electric Vehicle Sales Report includes a 7 year hybrid and electric light vehicle sales forecast by manufacturer, segment, model, and hybrid type (mild, medium or full hybrid).
- Updated quarterly, data in Excel plus PDF report
- The PDF report includes qualitative and quantitative analysis covering manufacturer product plans and technology
- Technology highlights include engine size, type and output of electric motor, battery size and type (NiMH, Li-ion), transmission and drive type
- Includes product lifecycle plans for HEV, PHEV and BEV
- Covers Domestic, Asian and European manufacturers
- Includes announced and probably hybrid models

U.S. Hybrid and EV Forecast – Q3 2011

- Hybrid Share in 2011: 2.1% (including PHEVs). Peak was 2.8% in 2009
- BEV sales in 2011: 12,500 (0.1% market share)
- YTD September sales:
 - Nissan Leaf – 7,199
 - Chevrolet Volt – 3,895
- BEV forecast: 96,000 units in 2016 (0.6% market share). 1% in 2020
- PHEV and BEV cumulative sales (2008-2015): 750,000. Short of the Obama target of 1 million units
- 51 PHEV and BEV models expected to be on the market by 2016
- PHEVs expected to outsell BEVs due to longer driving range and lower price
- Overcapacity will be a problem in the short and medium-term

Upcoming PHEV and BEV models

PHEV (2011-14)

- Fisker Karma
- Toyota Prius PHEV
- Cadillac XTS
- Cadillac ELR (rebadged Volt)
- Ford C-Max Energi
- Hyundai Blue-Will
- Suzuki Swift
- Volkswagen Golf PHEV
- Fisker Nina
- BMW i8
- Hyundai Santa Fe
- Mitsubishi Outlander
- Mercedes-Benz S-Class

BEV (2011-14)

- Coda sedan
- BYD e6
- Toyota Rav4 EV
- Tesla Model S
- Volkswagen Up!
- BMW i3
- Mitsubishi i-MiEV
- Ford Focus BEV
- Fiat 500 EV
- Audi R4
- Honda Fit EV
- Infiniti EV
- Chevrolet Spark EV

Engine and Transmission Report

- Light vehicle production forecast at engine and transmission level
- Covers advanced engine and transmission technology:
 - Gasoline direct injection
 - Cylinder de-activation
 - Turbo charging
 - Diesel and flex-fuel production
 - Dual clutch, 6/7/8/9-speed automatic transmissions
 - Hybrid, plug-in and electric vehicle production forecast
- Excel database includes vehicle production volumes
- PDF report includes qualitative analysis
 - 2016 CAFE implications and strategy
 - Vehicle manufacturer and Tier 1 supplier product plans

U.S. Diesel Forecast Study



Chrysler

- ❑ Cummins 6.7L I6
- ❑ Cummins Viking (4.2l V6 and 5.0l V8) in 2013/14 for Ram 1500 and SUVs?



Daimler

- ❑ 3.0L V6 for E/ML/R/GL-Class Bluetec diesels



Ford

- ❑ 6.7L V8 Scorpion replaces Navistar 6.4L



GM

- ❑ 6.6L V8 Duramax from DMAX (GM/Isuzu JV)
- ❑ Modular V diesel – 4.5L V8 ready to go in 2013/14 for light duty trucks



Volkswagen

- ❑ 3.0L V6 used in Audi Q7 and VW Touareg
- ❑ 2.0L I4 for VW Jetta, Passat and Audi A3

Alternative Powertrain Study

- Objectives

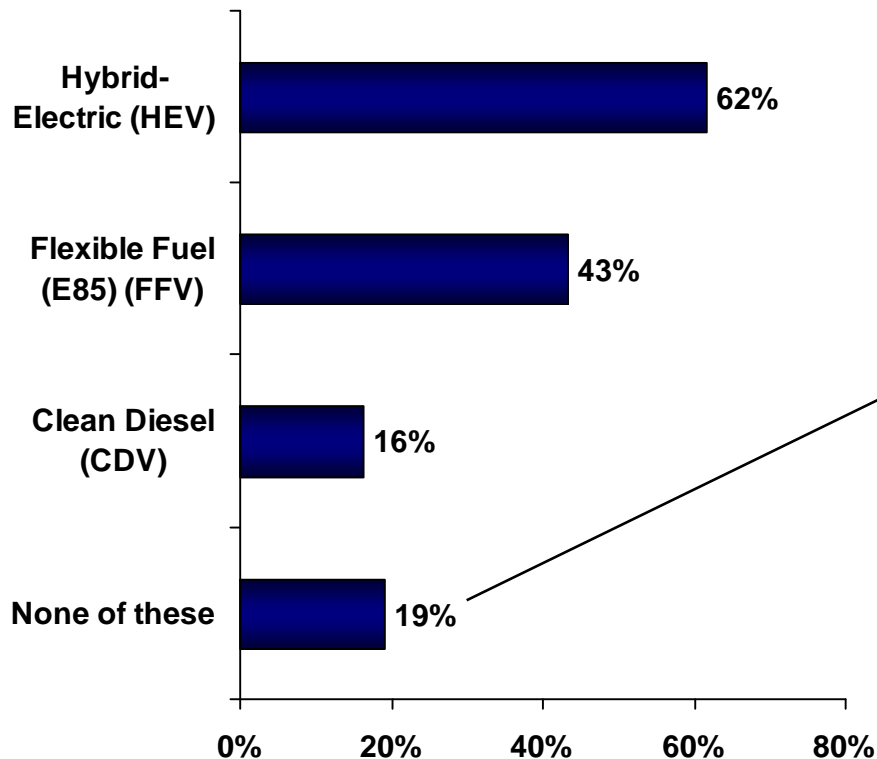


The J.D. Power and Associates 2009 Alternative Powertrain StudySM examines the “whys” and “why not’s” behind interest in hybrid-electrics, clean diesels, and flexible fuel vehicles.

- Examines reasons that affect the decision making process of hybrid-electric, clean diesel and flexible fuel(E85) vehicle technology among new vehicle purchase / lease intenders (within two years)
- Explores purchase drivers and impediments facing alternative powertrains (hybrid-electric, clean diesel and flexible fuel)
- Measures consumer interest and knowledge regarding plug-in hybrid-electric vehicles
- Measures consumer familiarity and level of interest in additional alternative fuels/powertrains (Bio-Diesel, Fuel Cell, Compressed Natural Gas, Battery Electric Vehicle)
- Measures consumer interest at price point price for “mild” fuel saving technologies
- Examines consumer knowledge on environmental issues and relation to purchase intent
- Addresses fuel economy concerns, dependency on foreign oil and the influence of government rebates on the vehicle purchase decision
- VOC-driven Environmental Impact Analysis (i.e., impact of the environmental issues on consumers’ automobile purchase decision)

Sample Study Findings

Alternative Powertrain Purchase Consideration



Why Are You Not Considering an Alternative Powertrain Vehicle?

"1. Expense. 2. Not offered on vehicles I am interested in. 3. New technology, afraid of making a huge investment into something new."

– Subaru Legacy owner

"Cost is exorbitant compared to the number of years I get out of a vehicle. I'll never make up the difference in cost."

– Jeep Patriot owner

"Have not seen them to be stable in the current market."

– GMC Envoy/Envoy XL owner

"I am not informed on long-term reliability and cost maintenance."

– Toyota Avalon owner

"I do not feel any of them have been perfected to the point they are truly reliable and they seem to be more expensive initially and repair wise."

– Chrysler Sebring Convertible owner

"I don't believe the vehicle I am considering has this option. I would consider if the option was available."

– Chrysler Town & Country owner

"Performance concerns and premium pricing."

– Lexus RX Series owner

Multiple Mention



The Essentials

The need to introduce powertrain electrification is now widely recognized, as is a strategy by OEMs to reduce carbon emissions from the vehicles they manufacture. The rate at which the available technologies are emerging varies widely by region and is dependent on many factors. Within the developed vehicle markets, the penetration of hybrids and EVs ranges from less than 1% to more than 10% of new-vehicle sales.

The quarterly *J.D. Power and Associates Global Hybrid and EV Forecast*SM and accompanying report, now in its second year of publication, provides a comprehensive perspective on the prospects for hybrids and EVs.

Research methodology is based on J.D. Power's expertise in vehicle demand forecasting. Fiscal, regulatory, and technical drivers of growth are balanced against OEM investment plans and customer attitudes on new technologies. Key factors affecting demand for hybrids and EVs are assessed for each country, including availability; durability of government incentives; framework surrounding vehicle emissions; and the strategies of key OEMs in each country.

While much attention is focused on vehicle electrification, the *Global Hybrid and EV Forecast* also includes progress in the conventional gasoline and diesel sectors as well as alternative fuels such as LPG, CNG, and flex fuel. Prospects for new technologies are dependent on the relative strengths of these sectors in individual markets both now and in the future. Vehicle buyers will compare hybrids and EVs against incumbent technologies, enabling them to make decisions based on cost, utility, and desirability.

Content

- Model-level coverage of four global regions and 14 national markets, which represents 80% of current global personal vehicle demand; also includes US light trucks
- Overview by country of the fiscal and regulatory drivers of hybrid and EV demand
- Assessment of major global OEMs' vehicle electrification strategies by technology and by region
- Hybrid and EV sales from 2007 with a 10-year forecast horizon in annual timeslices
- Forecasts of hybrid and EV personal vehicle demand (including US light trucks) by region, country, vehicle segment, group, make, model, and technology type: mild hybrid, full hybrid, plug-in hybrid, range extender, battery electric, fuel cell, and IC-only vehicles

Deliverables

- Electronic download of the data and forecasts. The data can also be downloaded from the client extranet site
- A comprehensive set of PowerPoint slides summarises the forecasts, and provides country-by-country hybrid and EV analysis as well as the strategies of the top 20 OEM groups
- Access to J.D. Power's industry staff during the subscription period
- One complimentary invitation to any J.D. Power Automotive Forecasting Conference or similar event held during the subscription period

Availability

- The *Global Hybrid and EV Forecast* is published quarterly in March, June, September, and December each year

For further information on this service, please contact:

J.D. Power Automotive Forecasting
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The Essentials

The *U.S. Hybrid Vehicle Forecast* provides a comprehensive overview of the current hybrid market and sales forecasts of hybrid vehicle demand by manufacturer and model for the next seven years.

The *U.S. Hybrid Vehicle Forecast* identifies the current and future specification details of all hybrid models that are currently available, as well as potential model entries that will be available in the U.S. market within the next seven years. The report also includes hybrid buyer demographic details and information related to consumer perception of hybrid technology obtained from research conducted by J.D. Power and Associates.

Content

- Hybrid technology overview identifies the different types of hybrid systems available
- Annual hybrid sales history and forecast by:
 - manufacturer and model, with hybrid technology specification
 - vehicle type and segment including model-specific detail of all hybrid vehicles that are currently available or will be available within the seven-year forecast horizon
- Vehicle Timelines and Cycle Plans include start of production and end of production dates
- Hybrid Buyer Demographics includes information related to buyers' income, education, residency and gender
- Vehicles Traded In to Purchase Hybrid Vehicles are identified to help determine which manufacturers are vulnerable to lost share as hybrid vehicle sales increase
- Consumer Perception of Hybrids is based on feedback from hybrid and non-hybrid vehicle owners
- U.S. Light-Vehicle Market Overview

Deliverables

- Four editions of the printed hard-copy report provided at quarterly intervals. These are also posted on our Web site and can be downloaded by any of the subscribing customers' personnel
- Four quarterly electronic downloads of the data and forecasts provided in annual timeslices, which can be downloaded by any of the subscribing customers' personnel
- Invitations to all J.D. Power Automotive Forecasting conferences
- Access at any time to our industry staff to discuss these reports and anything that may emerge from them
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The Essentials

The *Automotive Sales Forecasts* are regional reports that cover Europe, North America, South America and the Asia Pacific region, and together comprise the *Global Automotive Sales Forecast*. They combine comprehensive hard-copy reports with exceptionally user-friendly electronic downloads of the data and forecasts and are invaluable tools for marketing departments, competitive analysis teams, as well as vehicle importers and distributors.

Content

- Sales by
 - region and country
 - market segment
 - manufacturer, make and model
 - year (and optionally by quarter) and by model (with a time horizon of the current year plus seven years)
- Full supporting text discussing
 - macro-economic developments and future trends
 - legislative, environmental and fiscal drivers
- Detailed sales analysis and cycle diagrams

Country Coverage: Globally or By Region

- North America: *Canada, Mexico and the United States*
- Europe, Africa and the Middle East:
 - Europe: *Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Hungary, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and the UK*
 - Africa: *South Africa*
 - Middle East: *Iran*
- South America: *Argentina, Brazil, Chile, Colombia, Ecuador, Peru, Uruguay and Venezuela*
- Asia Pacific: * *Australia, China, India, Indonesia, Japan, Korea, Malaysia, the Philippines, Taiwan and Thailand*

* In partnership with Automotive Resources Asia (ARA)

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- Four quarterly electronic downloads of the data and forecasts, provided in annual and quarterly (optional) timeslices. These are provided with filters and pivot tables and can be downloaded by any of the subscribing customers' personnel
- Access to AutoQuery,™ an Internet-based tool for viewing the data and forecasts and for storing regularly used queries
- Invitations to all J.D. Power Automotive Forecasting conferences
- Access to our industry staff to discuss these reports and anything that may emerge from them
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The Essentials

The *Automotive Production Forecasts* are regional reports that cover Europe, North America, South America and the Asia Pacific region, and together comprise the *Global Automotive Production Forecast*. They combine comprehensive hard-copy reports with exceptionally user-friendly electronic downloads of the data and forecasts and are invaluable tools for marketing departments, capacity and capital planners, as well as individual OEM account executives.

Content

- Production by
 - region and country
 - month, quarter and year (with a time horizon of the current year plus seven years)
 - model and model generation, platform, manufacturer and make
 - vehicle type, segment and assembly plant
- Dates for start of production, end of production and next facelift
- Detailed product cycle diagrams and model line sales graphs
- Full supporting text discussing
 - macro-economic developments underlying demand forecasts
 - sales forecasts (including segmentation and other relevant issues)
 - production forecasts
 - manufacturer strategies

Country Coverage: Globally or By Region

- North America: *Canada, Mexico and the United States*
- Europe, Africa and the Middle East:
 - Europe: *Austria, Belgium, Bosnia, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, the Netherlands, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and the UK*
 - Africa: *South Africa*
 - Middle East: *Iran*
- South America: *Argentina, Brazil, Chile, Colombia, Ecuador, Peru, Uruguay and Venezuela*
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- Four quarterly or 12 monthly electronic downloads of the data and forecasts provided in annual, quarterly and monthly (optional) timeslices. These are provided with filters and pivot tables and can be downloaded by any of the subscribing customers' personnel
- As an optional extra, the production forecasts can be provided in greater detail by bodystyle and by number of doors
- Access to AutoQuery,™ an Internet-based tool for viewing the data and forecasts and for storing regularly used queries
- Invitations to all J.D. Power Automotive Forecasting conferences
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The Essentials

The *Global Commercial Vehicle Forecast* provides a clear and concise view of the medium and heavy commercial vehicle sectors of the automotive industry in a single user-friendly report. Comprehensive coverage of the world's major automotive markets offers valuable insight into the varying environments in which the industry operates and the factors and developments affecting both sales and production.

The *Global Commercial Vehicle Forecast*, published in conjunction with ACT Research, analyzes the current state of the industry and forecasts its evolution with an unmatched level of detail. Given the present volatile state of the global industry, organizations involved in the commercial vehicle sector will benefit enormously from the details of the global industry included in this publication.

Content

- Sales and production forecasts by:
 - region and country
 - quarter and year (with a time horizon of the current year plus seven years)
 - manufacturer, marque and GVW segment
- Indicative forecasts for 10 and 15 years in the future
- Global assessment of vehicle manufacturers' plans and strategies
- In-depth regional and country-level macro-economic commentaries
- Full supporting text discussing sales, segmentation and production trends for each market

Country Coverage: Globally or By Region

- North America: *Canada, Mexico and the United States*
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 - Africa: *South Africa*
 - Middle East: *Iran*
- South America: *Argentina and Brazil*
- Asia Pacific: *Australia, China, India, Japan and Korea*

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- Reasonable access to our industry staff to discuss these reports and any anything that may emerge from them
- Invitations to all J.D. Power Automotive Forecasting conferences
- A preferential subscription to the *Global Car & Truck Forecast*
- A subscription to the *Global PowerTracker* newsletter

About ACT Research

Americas Commercial Transportation (ACT) Research is a recognized provider of data and forecasts for the commercial vehicle industry in North America. ACT delivers market information that is not widely available, thereby adding substantial value to the *Global Commercial Vehicle Forecast*.

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Content

- Engine and transmission demand by:
 - region and country
 - quarter and year (with a time horizon of the current year plus seven years)
 - model and model generation, platform, marque and manufacturer
- Engine information by engine family, displacement, power and torque, cylinder configuration, number of cylinders, valve train type, fuel type and aspiration (further information detailing head and block material is also available)
- Transmission information by type (manual/auto/automated manual), number of speeds, driven wheels, engine orientation and transmission producer
- Engine and transmission production by region and country, manufacturer and plant
- Full supporting text discussing:
 - macro-economic developments underlying forecasts of vehicle sales and production
 - overall regional trends in the evolution of engine and transmission usage and production
- Detailed engine and transmission family and series cycle diagrams and analysis

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The Essentials

The *Global Car & Truck Forecast* provides a comprehensive view of the current state of the global automotive industry combined with wide-ranging forecasts of the industry's likely evolution. The *Global Car & Truck Forecast* is the only publication that combines coverage of the passenger car and light and heavy commercial vehicle sectors in a single publication. The service provides annual data and forecasts of new sales, production and vehicle parc for all major automotive markets worldwide for the current year and following seven years. The report also includes indicative country-level forecasts for the next 10 and 15 years. Production data and forecasts for all light vehicles up to 6t GVW are provided at manufacturer and model level. Each manufacturer's product cycle plans are also included in an easy-to-read graphical format.

Content

- Production by
 - region and country
 - year (with a time horizon of the current year plus seven years)
 - group, marque and model
- Sales by manufacturer and marque
- Global assessment of vehicle manufacturers' plans and strategies
- In-depth regional and country-level macro-economic commentaries
- Full supporting text discussing sales, segmentation and production trends for each market

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