



CSM Worldwide's Global Powertrain Forecast Service provides detailed analysis on regional economics, sales, product cycles and manufacturing strategies. Each forecast provides detailed analysis by engine platform with an emphasis on product features and new technologies. OEMs, automotive suppliers and financial institutions all utilize CSM forecasts to make strategic business decisions.

Each report includes:

- **Economic & Demand Analysis** - Economics and sales overviews for each region and country with key economic indices.
- **Manufacturer Analysis** - Manufacturer analysis including short- and long-term outlooks of regional and global strategies
- **Platform Analysis** - Engine platform analysis including production outlook, engine platform specifications, production volumes by engine and assembly plant, installation by vehicle and cycle timing charts by engine.
- **Engine Analysis** - Regional production tables covering engine production by manufacturer, platform and assembly plant and regional sales tables covering engine sales by vehicle installation
- **Technology Analysis** - Engine production volumes by technology including engine design type (Hybrid/ICE/Electric), cylinder configuration, valvetrain arrangement, fuel type and displacement.
- **Transmission Analysis** - Transmission production by manufacturer, model, plant and vehicle installations. Includes transmission model cycle plans.

The Powertrain Forecast Service is available globally or for any of these six regions: Europe, Greater China, Japan/Korea, North America, South America and South Asia.

This service is delivered via hard copy book, CSM AutoBase™, CSM's online query tool, and electronic e-files. Additional benefits include CSM Insights quarterly newsletter, CSM Insider Series Client Briefings, training and unlimited analyst support.

Executive Summary of Changes to Production Plan

Europe Executive Summary

- In 2010, European output is now forecast to rise 1.7% over 2009 levels, to 20.52 million units. This is marginally up on the Q3 forecast that identified a 1.7% improvement.
- Ford/Chevy and Toyota continue to show strength but Fiat has made an impressive improvement, clearly due to the new Punto. The success of the forthcoming 510c replacement and a new 300c who are in the next 12 months will be vital to consistent recovery. Ford of Europe, including TAC, is also performing well.

Europe Executive Summary

- Volkswagen Group is in a much stronger position with Toyota, BMW and Renault/Peugeot.
- The European year before the recession was the best in 10 years. The current 1.8% forecast is a significant improvement.

OEM Strategy

BMW DESIGN PARENT ANALYSIS



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Trend Analysis by Country, OEM and Powertrain Specification

OVERVIEW TABLES

TOTAL PRODUCTION BY DESIGN PARENT/COUNTRY

Country/Design Parent	2008	2009	2010*	2011*	2012*	2013*	2014*	2015*	2016*	2017*
Germany	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
France	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
UK	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Spain	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Italy	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
China	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
USA	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Japan	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
India	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
South America	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
South Asia	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000

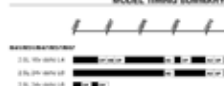
OVERVIEW TABLES

TOTAL EUROPE PRODUCTION

Country	2008	2009	2010*	2011*	2012*	2013*	2014*	2015*	2016*	2017*
Germany	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
France	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
UK	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Spain	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Italy	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
China	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
USA	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Japan	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
India	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
South America	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
South Asia	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000

Focus Sales on Opportunity Timing

BMW MODEL TIMING SUMMARY



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Engine Plant Analysis

BMW ENGINE PLANT FORECAST

Calendar Year	2008	2009	2010*	2011*	2012*	2013*	2014*	2015*	2016*	2017*
BMW (Automotive)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
BMW (Commercial)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
BMW (Other)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000

Transmission Analysis

CSM Worldwide North America Transmission Production Forecast Service

Calendar Year Production 2008 to 2012	2008	2009	2010*	2011*	2012*	2013*	2014*	2015*	2016*	2017*
Automotive (Manual)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Automotive (Automatic)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Commercial (Manual)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Commercial (Automatic)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Other (Manual)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Other (Automatic)	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000

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