



March 13<sup>th</sup> 2012

# CURRENT STATUS AND GROWTH PROSPECTS FOR BMW GROUP'S MID- AND FULL-SIZE VEHICLES.

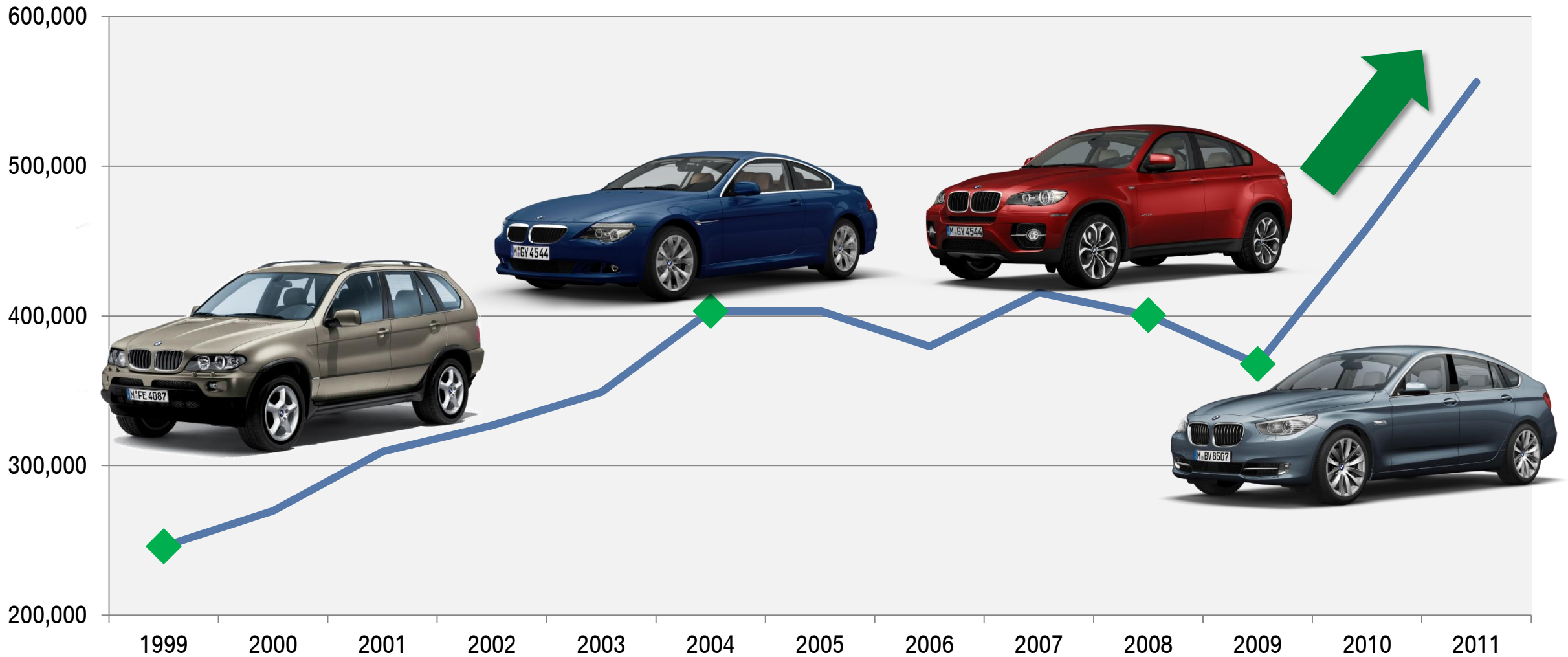
**THOMAS GIULIANI, VICE PRESIDENT PRODUCT MANAGEMENT.**

**BMW  
GROUP**









Rolls-Royce  
Motor Cars Limited

# VOLUME WITHIN MID/FULL-SIZE CAR SEGMENT MORE THAN DOUBLED SINCE 1999: 7% ANNUAL GROWTH ON AVERAGE.



\*5Series, 6 Series, 7 Series, X5, X6

# BEST PRODUCT PORTFOLIO IN THE HISTORY OF THE BMW GROUP. MORE THAN 1/3 OF BMW GROUP VOLUMES GENERATED WITH MID/FULL-SIZE CARS.

	X5/X6	5 Series	5 Series Gran Turismo	6 Series	7 Series	Rolls Royce
						
<b>Volume '11</b>	145,649	← 332,501 →		9,396	68,774	3,538
<b>YoY growth</b>	0%	← +40% →		+60%	+5%	+30%
<b>Facts</b>	<ul style="list-style-type: none"> <li>• Segment leadership for X5 &amp; X6</li> <li>• Breaks with typical life-cycle sales curve</li> <li>• New models: X5 M50d, X6 M50d in 08/12; X6 LCI</li> </ul>	<ul style="list-style-type: none"> <li>• Worldwide segment leader</li> <li>• Customer satisfaction far above competition</li> <li>• Balanced volumes across Europe, US, Asia</li> </ul>	<ul style="list-style-type: none"> <li>• Established new segment, unique in market</li> <li>• Highly profitable, and above expectations especially in Asia</li> </ul>	<ul style="list-style-type: none"> <li>• Segment leader in US and Asia</li> <li>• Icon and brand shaper that won various design awards</li> </ul>	<ul style="list-style-type: none"> <li>• Highly profitable image shaper</li> <li>• Benchmark in balance between comfort and driving dynamics, design and technology</li> <li>• Best in class engines</li> </ul>	<ul style="list-style-type: none"> <li>• timeless interpretation of the modern luxury motor car</li> <li>• Combining state-of-the-art technology and engineering with contemporary design</li> </ul>

# BMW GROUP'S MID/FULL-SIZE CAR OFFERING – A SUCCESS STORY ACROSS ALL MARKETS.



## USA

- 5 Series segment leader
- X5/X6 segment leader



## Korea

- 4<sup>th</sup> biggest market for 5 Series GT and 7 Series



## Europe

- 5 Series segment leader
- Biggest sustainable green fleet of large cars
- 520d ed < 119g CO<sub>2</sub>



## U.A.E.

- 7 Series is key model
- Largest BMW dealership worldwide



## China

- Biggest market for 7 Series
- Strongest growth potential for large cars
- Local production of 5 Series Long Wheel Base



# BMW GROUP'S MID/FULL-SIZE CAR OFFERING SPANS FROM TOP-END PREMIUM TO SUPER LUXURY SEGMENT.

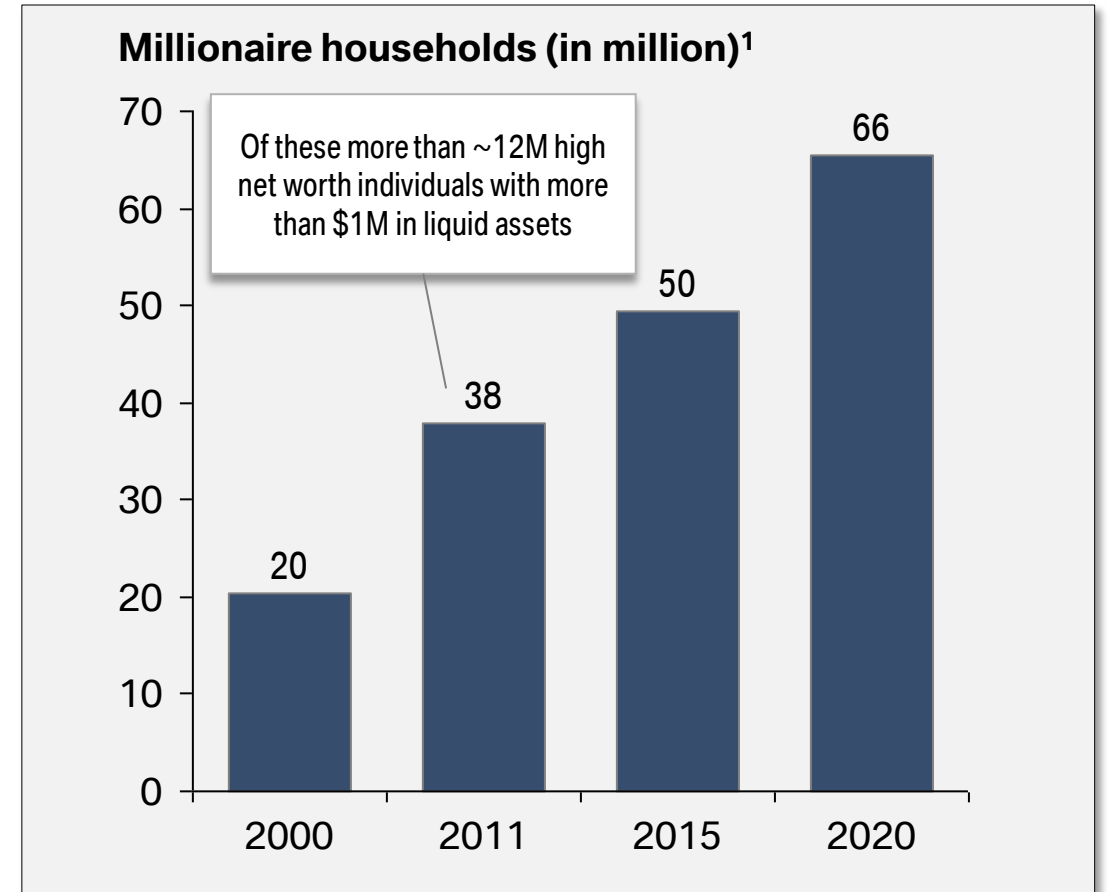


# LUXURY IS A \$1 TRILLION GLOBAL GROWTH INDUSTRY.

## Luxury is a one trillion dollar industry...



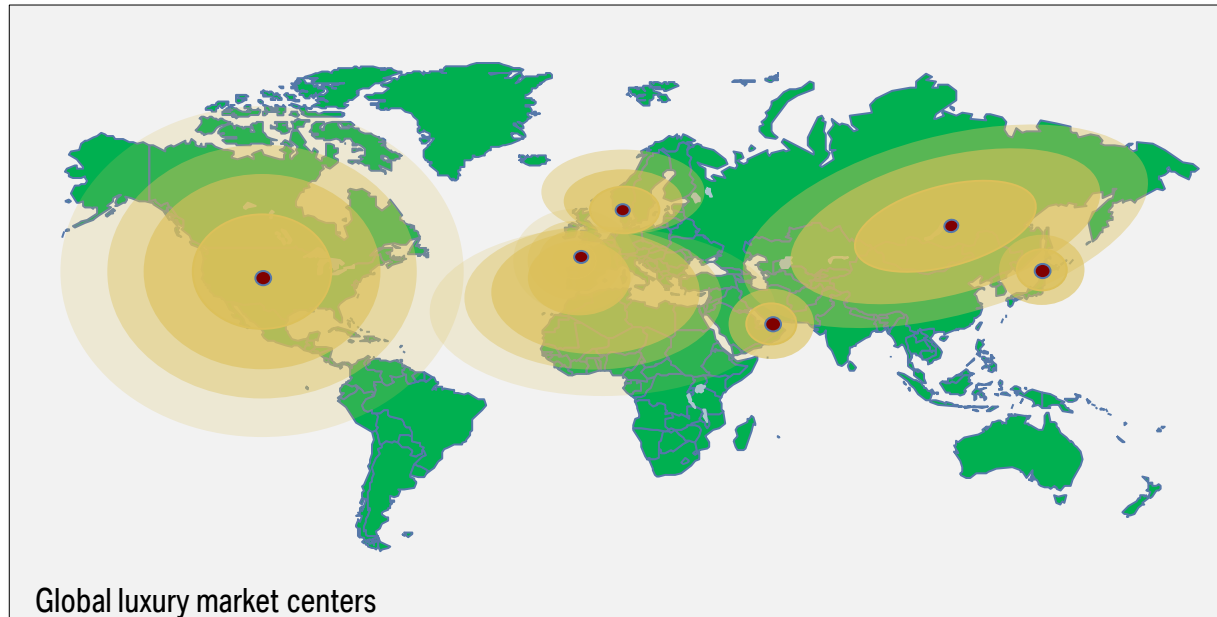
## ...and growing rapidly.



1) For 25 developed and emerging countries  
Source: Deloitte Global wealth among millionaire households

# BMW GROUP UNIQUELY POSITIONED TO COMPETE IN HIGHLY ATTRACTIVE GLOBAL MARKET.

## The luxury market is global and attractive...



The luxury market is:

- Global, not just in emerging markets
- Fast growing
- Highly profitable

## ...and BMW Group is in a unique position to benefit from it



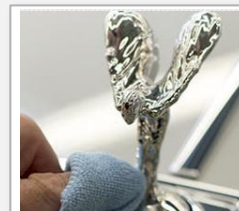
BMW with decades long heritage in luxury segment.



BMW with global footprint and a very strong brand around the world



BMW with best positioned portfolio in this segment



Rolls Royce the most admired luxury brand

# WE WILL FURTHER STRENGTHEN OUR LEADERSHIP POSITION.



We have the **right products** in place and continue to keep them **attractive** and **competitive** over lifecycle.



We are **globally present** and have the **local knowledge** to delight our customers all over the world.



We are **strong in innovation** and fuel **efficiency** and will direct the future of the market with our initiatives.



We continue to provide a unique **brand and luxury experience** to further the fascination and joy of our brand.



# NEW SUCCESS STORIES TO COME SOON – LIKE THE 6 SERIES GRAN COUPÉ.

## 6 Series Gran Coupé: A stunning product...



- Stunning, extravagant and unique design icon in tradition of BMW 6 Series
- Luxury car embodying passion & sovereignty
- Exclusive (supported by BMW Individual)
- Impressive Driving Dynamics

## ...developed in record time

Start development



- Used virtual product development processes
- Achieved time savings of 30% compared to standard process
- Even higher development and investment savings (-50%)
- Proof that BMW can exploit market opportunities extremely economically