



March 13th 2012

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

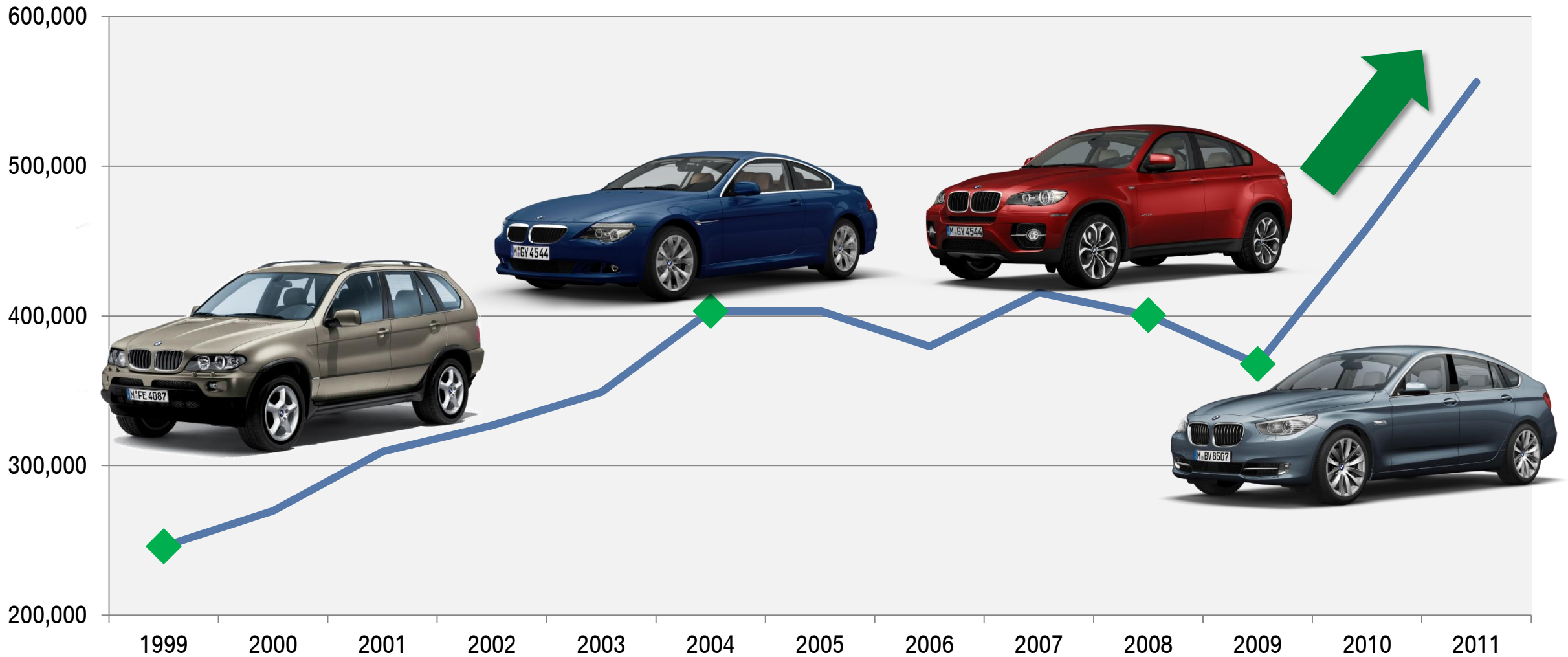
THOMAS GIULIANI, VICE PRESIDENT PRODUCT MANAGEMENT.

**BMW
GROUP**









Rolls-Royce
Motor Cars Limited

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



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

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



USA

- 5 Series segment leader
- X5/X6 segment leader



Korea

- 4th biggest market for 5 Series GT and 7 Series



Europe

- 5 Series segment leader
- Biggest sustainable green fleet of large cars
- 520d ed < 119g CO₂



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.

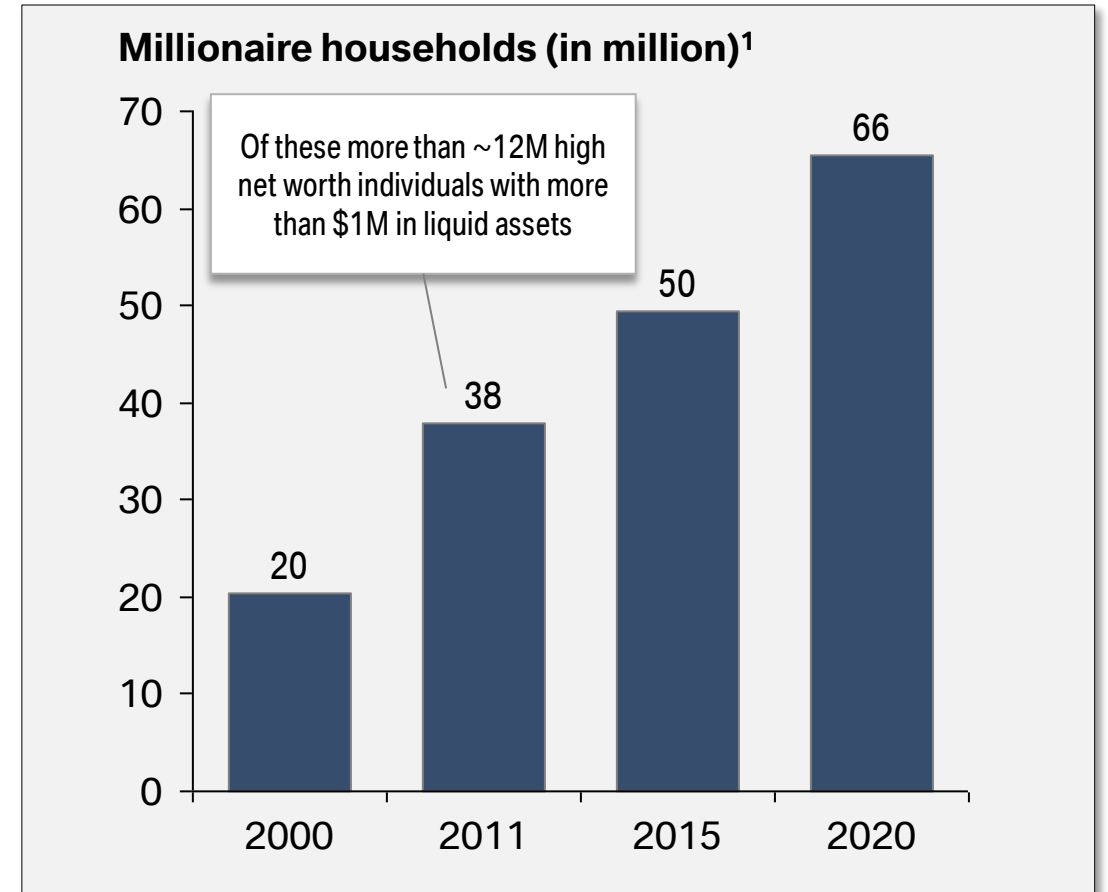


LUXURY IS A \$1 TRILLION GLOBAL GROWTH INDUSTRY.

Luxury is a one trillion dollar industry...



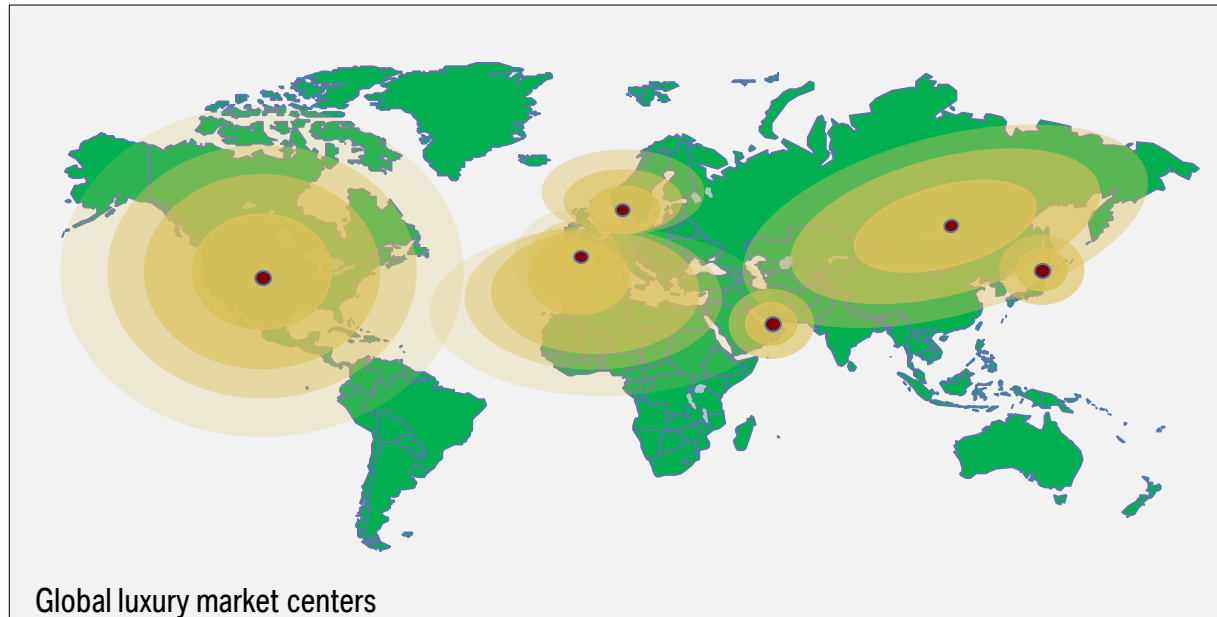
...and growing rapidly.



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

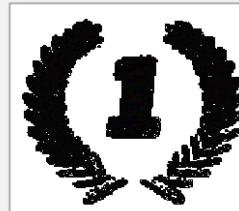
...and BMW Group is in a unique position to benefit from it



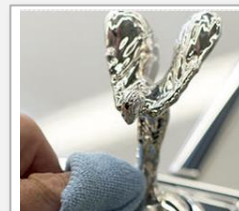
BMW with decades long heritage in luxury segment.



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