

„We make global markets transparent“

anp management consulting GmbH

Selected case studies Automotive & Mobility

Essen, March 2022





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Added value

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anp management consulting GmbH is a leading B2B marketing consultancy for decision-makers from the Automotive Industry.



Peter Nagel

Founder & Managing Partner
Diploma in Economics
Industrial Manager

Overview

- | | |
|---------------------------|--|
| ■ Our claim: | „We make global markets transparent“ |
| ■ Founded: | 2004 in Essen, Germany |
| ■ Team/Experts: | 82/360 |
| ■ Projects: | 700 in more than 62 countries |
| ■ Clients: | Global Player, SMEs, Organizations, Services |
| ■ Global Experts/Partner: | 820 |

As market- / competitive intelligence and benchmarking specialists, we deliver "World Class Automotive Intelligence" and support our customers with global research, in-depth strategic analysis and expert interviews.

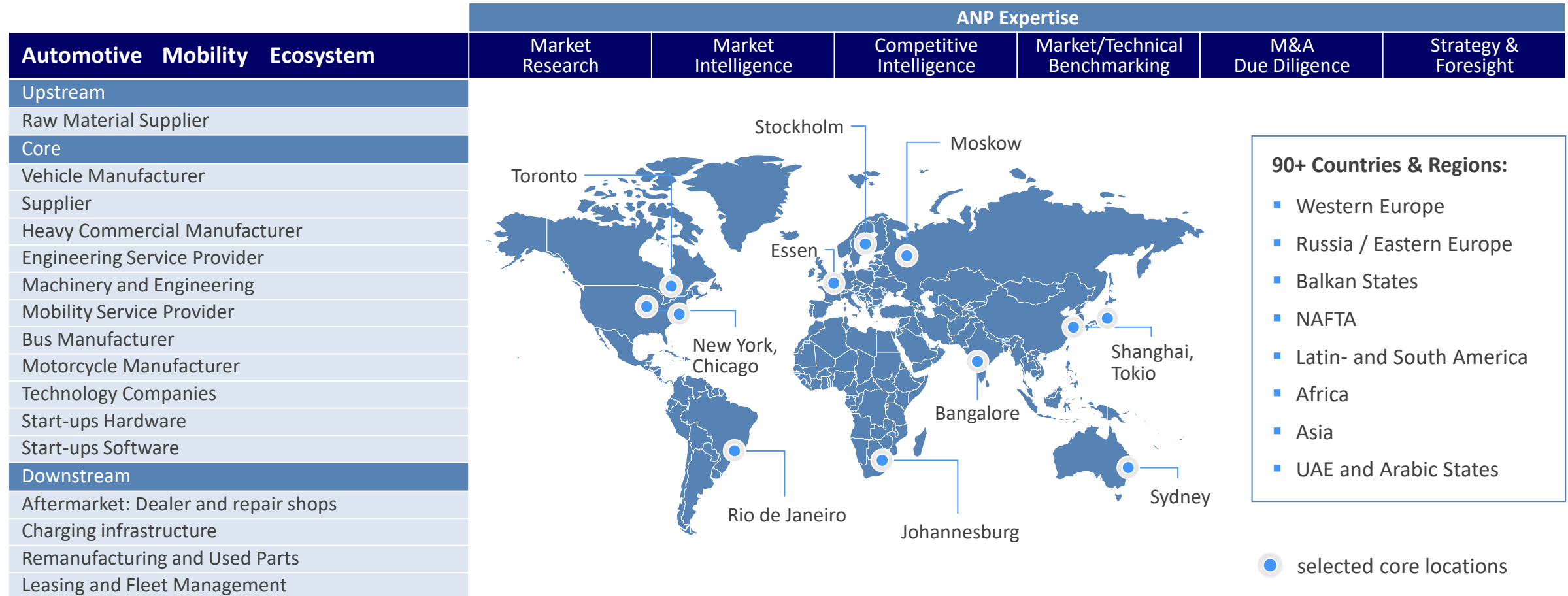
We have firmly aligned our business to those services where we know we can outperform the competition. Therefore we do not compromise on quality.

We offer the complete service portfolio of strategic marketing. For many years we have developed and perfected proprietary intelligence methods in order to obtain information that is not easily accessible.

As a result, we create sustainable added value for our customers by increasing their competitiveness and creating a valid basis so that the right strategic decisions can be made.

Overview: Automotive & Mobility – Expertise – Global Coverage

Our expertise in the automotive & mobility sector extends across the entire value chain. The global locations of our analysts and experts guarantee “local knowledge” without cultural and linguistic barriers.



Market intelligence: Premium car market in China

Client

- Global Automotive Supplier
- Business: Interior Premium Parts
- Position: Global Director Marketing & Design

Content (excerpt)

- What does premium car and luxury mean for Chinese customers?
- What are the key buying factors?
- Reasons why Chinese people buy luxury cars
- Luxury market trends
- Outlook: Car interior of the future (2025/2030) in the Chinese market
- Special characteristics and differences from the market in Europe

Methodology and duration

- Desk research [German, English, Chinese]
- In-depth expert interviews Chinese Language
- Project duration: 6 weeks

Team

- Project Manager
- Analysts and consultants located in China
- Team size: 3

Added value

- Better understanding of the Chinese premium market
- Basic knowledge in order to develop a suitable market strategy for local OEMs
- Market foresight

Competitor intelligence: Supply chain and parts battery module

Client

- TOP-5 Battery Supplier
- Business: Battery cells
- Position: Senior Engineer R&D

Content (excerpt)

- Investigation of competitor supply chain:
 - Investigation of supply chain
 - Cell producer
 - Part supplier for cell hosing, end plate, cap components ...
 - Materials used for cell housing, cap components ...

Methodology and duration

- Desk research
- In-depth expert interviews
- Project duration: 6 weeks

Team

- Project manager
- Consultants
- Team size: 4

Added value

- Competitor insights about lost business
- Information about parts supplier
- Information about materials

Benchmarking: Competitor global purchasing organization

Client

- Vehicle manufacturer
- Business: Passenger vehicles
- Position: Head of global purchasing

Content (excerpt)

- Documentation of total purchasing organization structure incl. all brands and departments
- Structure of Global Purchasing Organization [OEM Competitor]:
 - => Headquarters and departments
 - => International and local organization and brands
- Headcounts split by purchasing organization, departments & brands
- Roles & responsibilities of departments

Methodology and duration

- Desk research
- In-depth expert interviews: Face-to-Face & Phone
- Project duration: 8 weeks

Team

- Project manager
- Analysts & consultants
- Team size: 4

Added value

- Detailed insights in competitors' organization with regard to headcounts, functional dependencies, hierarchical structure, interpersonal cooperation
- Concrete starting points for internal optimization

Benchmarking and value engineering: Competitor carry over parts and platform analysis

Client	Methodology and duration
<ul style="list-style-type: none">▪ Vehicle manufacturer▪ Business: Passenger vehicles▪ Position: Head of packaging, R&D	<ul style="list-style-type: none">▪ Vehicle tear down▪ Analysis bill of material (BOM)▪ Expert view and parts analysis on site▪ Project duration: 6 weeks
Content (excerpt)	Team
<ul style="list-style-type: none">▪ Investigation objects: Five competitor vehicles based on the same platform▪ Advise for optimizations related to costs, engineering and materials▪ Component selection in ABC perspectives of customer value vs. part costs▪ Focus on most promising combinations of high value at low cost▪ Identification of examples for OEM-wide standardization and modularization▪ Product cost calculation of selected parts	<ul style="list-style-type: none">▪ Project manager▪ Consultants▪ Team size: 3
	Added value
	<ul style="list-style-type: none">▪ Valid basis for client's product and product cost optimization▪ Evaluated and approved cost reduction measures about product costs▪ Valuable hints for weight saving potential and advisory related to optional engineering solutions as well as alternative product design

Benchmarking: Competitor working time regulation and human resources policy

Client		Methodology and duration	
<ul style="list-style-type: none">▪ Vehicle manufacturer▪ Business: Passenger vehicles▪ Position: Head of HR & Legal		<ul style="list-style-type: none">▪ Questionnaire▪ Desk research▪ In-depth expert interviews▪ Project duration: 8 weeks	
Content (excerpt)		Team	
<ul style="list-style-type: none">▪ Weekly working time▪ Flexible or fix working time - hours▪ Part time concept - lunch hours - extra time▪ Time tracking and registration - training schemes▪ Flextime account and transferability of flextime▪ Regulation of working time - hours for business trips▪ Policy for handling of sick leave (escalation method)▪ Car leasing - company phone - flight policy and company pension scheme		<ul style="list-style-type: none">▪ Project manager▪ Consultants▪ Team size: 3	
		Added value	
		<ul style="list-style-type: none">▪ Benchmark competitor insights▪ Decision-making basis to adapt new rules and regulations in the field of HR policy and incentive system	

Commercial due diligence: Automotive supplier acoustics parts

Client

- Automotive supplier
- Business: Acoustic parts
- Position: Managing Board, Private equity owner

Content (excerpt)

- Check-up internal KPIs
- Market potential and competitor analysis
- Product and customer ABC-Analysis
- Pricing and innovation analysis
- Assessment of R&D potential
- SWOT analysis
- Strategy development and Foresight
- Identification of growth levers
- Final evaluation and recommendation

Methodology and duration

- Desk research
- Face-to-face interviews
- Customer satisfaction analysis
- Project duration: 6 weeks

Team

- Project manager
- Consultants
- Team size: 3

Added value

- Final assessment and input for Board of Management
- Decision-making basis, insights and foresight for private equity investors
- New setup of sales and marketing team

Commercial due diligence: Automotive supplier electronic and plastic parts

Client

- Supplier of plastics and electronic parts, Turnaround project
- Business: Medical, Electronics, Automotive
- Position: Managing Director, Head of Marketing & Sales

Content (excerpt)

- Plausibility check business plan: Sales and turnover
- Scenario planning taking into account the essential basic premises
- Product and customer ABC-Analysis
- Pricing and innovation analysis
- Assessment of R&D potential
- Employee audit sales and marketing dpt.
- Determination of critical success factors
- SWOT analysis
- Final evaluation and recommendation

Methodology and duration

- Desk research
- Face-to-face interviews
- Customer satisfaction analysis
- Project duration: 5 weeks

Team

- Project manager
- Consultants
- Team size: 2

Added value

- Final assessment and input for Board of Management
- Insights and foresight for private equity owner
- Decision-making basis with regard to investments, products/services as well as HR.

M&A support: Target screening & profiling Eastern Europe

Client

- Mechanical engineering
- Business: Injection moulding and RTM parts
- Position: Head of marketing and business development

Content (excerpt)

- Client wanted to expand its business in Eastern Europe
- Identification of M&A targets in
 - Ukraine
 - Poland
 - Bulgaria
 - Slovenia
 - Hungary
- Company profiles and long list
- In-depth profiles of competitors from short list

Methodology and duration

- Definition of search profile for possible targets
- Desk research
- Expert interviews in local languages
- Project duration: 4 weeks

Team

- Project manager
- Analysts and consultants
- Team size: 4

Added value

- Executive board template
- Basis for further strategic decision-making
- Transparency of the local competitor landscape

Aftermarket: Dealer network competitor data collection in 30 countries

Client		Methodology and duration	
<ul style="list-style-type: none">▪ Automotive manufacturer▪ Business: Premium passenger vehicles▪ Position: Network development manager Eastern Europe		<ul style="list-style-type: none">▪ Combination of desk sources and interviews with dealers and repair shops▪ Validation of data by personal visits of dealers▪ Project duration: 14 weeks	
Content (excerpt)		Team	
<ul style="list-style-type: none">▪ Locating dealership network of six premium competitors▪ Distribution formats for potential competitors▪ Size of the locations▪ Cars on display (New and used vehicles)▪ Equipment: Work bays, HV repair, body shop etc.▪ Services offered at the different locations▪ Compare current status quo of initiatives vs. benchmark		<ul style="list-style-type: none">▪ Project manager▪ Local analysts and consultants▪ Team size: 12	
		Added value	
		<ul style="list-style-type: none">▪ ANP delivered thousands of market data for client who will introduce a new after sales concepts and new operative roadmap for their network strategy 2025.▪ Client gains knowledge of existing dealer & service competitor network▪ Identify opportunities/initiatives to increase turnover in Eastern Europe	

Aftermarket: Identification of service and spare parts for predictive maintenance systems

Client

- Global leading automotive supplier
- Business: Predictive maintenance
- Position: Head of future technologies aftermarket

Content (excerpt)

- Most frequently replaced components by vehicle type and age
- Service intervals
- Wrongly replaced components
- Spare parts rankings
- Kilometer rankings

Methodology and duration

- Preparation of questionnaire and basic desk research
- 100 phone interviews in Germany, UK, Italy and Poland [OEMs, repair shops, logistics and fleet companies]
- Project duration: 3 months

Team

- Project manager
- Consultants
- Team size: 5

Added value

- Understanding of customer needs and general market
- Profound information related to the current market position and future perspective of predictive maintenance

Market Research: Raw materials & supplies

Client

- Automotive manufacturer
- Business: Passenger vehicles
- Position: Head of cost controlling

Content (excerpt)

- Research of market prices/costs of
 - 25 raw materials and supplies in
 - 50 different countries as well as in
 - 400 most important regions/hot spots measured by the "industrial output"
- Deliverable:
Excel File incl. all secondary and primary sources

Methodology and duration

- Desk research
- Expert interviews
- Project duration: 3 months

Team

- Project manager
- Consultants
- Team size: 14

Added value

- All data have been verified by the customer
- Market priced were entered into the OEM cost management tool and serve now as a basis of the future global cost controlling

Market Potential Analysis: Aluminium Gravity Die Casting NAFTA & EU

Client

- Automotive supplier
- Business: Metal casting and engineering
- Position: Head of Marketing

Content (excerpt)

- Market development: Total market, automotive market, applications, market volume & shares
- Main automotive applications & technologies
- Key market trends
- Validation of future possible substitution by other materials/technologies
- Top competitors with reference to revenue, products, market share, locations

Methodology and duration

- Desk research NAFTA / EU
- In-depth expert interviews: Face-to-face and Phone
- Project duration: 10 weeks

Team

- Project manager
- Analysts and Consultants
- Team size: 3

Added value

- Knowledge of market size, -volume, -potential
- Identification of competitors
- Secure basis for investment decision-making

Market Potential Analysis: E-Mobility Electric Forklifts/Lift Trucks in the USA

Client

- Supplier Battery systems for diverse industries
- Business: Li-Ion batteries Aerospace, Transportation
- Position: CEO

Content (excerpt)

- Distribution, sales channels and main distributors
- US-based forklifts/forklift trucks OEMs and end customers
- Possible strategies for client to enter the market
- Identification and profile of market competitors
- Market volume, market share lead acid vs. Li-ion batteries
- US-typical requirements named from end users, distributors and OEMs
- Factors impacting Total Cost of Ownership

Methodology and duration

- Desk research
- In-depth expert interviews: Face-to-face and Phone
- Project duration: 8 weeks

Team

- Project manager
- Analysts and Consultants
- Team size: 4

Added value

- Valid and transparent information base for the Business Unit Batteries
- Today client is already active in the US Forklift market

Market-/Competitive Intelligence: Exhaust Aftertreatment Systems Europe

Client	Methodology and duration
<ul style="list-style-type: none">Global Automotive SupplierBusiness: Exhaust Aftertreatment SystemsPosition: Head of Business Development & Marketing	<ul style="list-style-type: none">Desk researchExpert interviewsProject duration: 7 weeks
Content (excerpt)	Team
<ul style="list-style-type: none">Which kind of sourcing strategy follow the competitors?Which sales and purchasing collaborations are pursued and applied by the four players in the field of diesel engines?Validation of hypothesis in terms of margin: <p>Diesel Engine OEMs cut their range of variety of diesel engines because it is not worth any longer. More diesel engines no longer meet the emission standards. Who is affected if above is true?</p>	<ul style="list-style-type: none">Project managerConsultantsTeam size: 2
	Added value
	<ul style="list-style-type: none">Profound knowledge to develop the sales strategyEvaluation of needs for possible collaborationsValidation and assurance of own market assessment

Strategy & Foresight: Development of a market growth strategy for Polycarbonate (PC) related to the Asian market

Client	Methodology and duration
<ul style="list-style-type: none">▪ Raw material supplier▪ Business: Business Unit (BU) Polycarbonate (PC)▪ Position: Head of BU PC APAC	<ul style="list-style-type: none">▪ Questionnaire▪ Desk research▪ Expert interviews (Face-to-Face, Phone)▪ Project duration: 9 weeks
Content (excerpt)	Team
<ul style="list-style-type: none">▪ Market analysis automotive PC/PC blends APAC, China, Korea▪ Identification of automotive product applications▪ Determination of market volume, market potential and market shares▪ Profiling of relevant competitors▪ Customer survey in coordination with the client▪ SWOT Analysis, critical success factors▪ Growth strategy development▪ Scenario planning of market potential	<ul style="list-style-type: none">▪ Project manager▪ Consultants▪ Team size: 5
	Added value
	<ul style="list-style-type: none">▪ Better understanding of PC market applications and trends▪ Insights to chances and risks▪ Valid and transparent information base for the board of directors▪ Basis for strategic decision making related to the BU PC

Strategy & Foresight: Strategy development service provider laser welding for (Automotive Parts)

Client	Methodology and duration
<ul style="list-style-type: none">Service providerBusiness: Laser welding for rotation-symmetric partsPosition: Managing Director	<ul style="list-style-type: none">QuestionnaireDesk research25 in-depth expert interviews (Face-to-Face, Phone)Project duration: 10 weeks
Content (excerpt)	Team
<ul style="list-style-type: none">Market analysisCompetitor analysisIdentification of service relevant applications in clients' marketsSWOT analysis, definition of critical success factorsStrategy development: Market strategy, competitor strategy, pricing & growth strategyCreation of a road map for customer database, customer value management, sales controlling, communication, PR, acquisition and marketing	<ul style="list-style-type: none">Project managerConsultantsTeam size: 2
	Added value
	<ul style="list-style-type: none">Identification of growth, market potential and trendsActionable marketing and strategy conceptFormulation of relevant growth instrumentsOperative roadmap

Market research: 2021/2022

Market research

- Direct to customer Sales
- German OEM Startup activities
- German OEM ecosystem overview
- New and emerging business models in the E-mobility environment
- Best practice solutions for B2B sales
- Cost of autonomous driving levels & timing

Market research

- Understanding agency models in automotive retail
- Connected car insights
- Connected products and digital business models
- Direct-to-customer sales and effects on working capital and stock exchange
- New and emerging BEV player profiles
- Gigafactory Berlin plant profile

Market research

- EU, US and China regulation framework for autonomous driving
- Cost buckets advertising
- Battery cell screening for selected BEV player
- OEM BEV E/E organization structure
- OEM BEV Chip architecture screening
- Market monitoring semiconductor crisis

Market research

- Identification and profiling of plant locations from ADAS, Semiconductor and E-Mobility supplier
- Trucks fleet management services
- Green tires market development
- BEV model launch plan and forecast
- BEV online car sales analysis
- Truck charging points and fuel stations: Investment costs and infrastructure

Market research

- Market for electric vehicle charging stations
- MOSFET Chip architectures
- Ridesharing market screening EU
- Performance management system OEMs
- Age structure used cars EU
- Revenue and cost data for selected premium cars
- Emission costs automotive supplier

Market research

- Market development power electronics SiC/GaN
- Abatement curves
- Price development automotive plastics
- Heavy duty vehicles: Technology adoption BET and FCET
- Sustainability benchmark OEMs
- Market screening electric motorcycles

Selected project topics split by expertise

Market research

- OEM dealership: Data collection of several hundred competitor locations in 30 countries
- Determination of procurement costs for materials and supplies in fifty countries and regions
- Predictive Maintenance Services: 100 interviews in 5 countries
- Charging Infrastructure US, JP
- OEM R&D location profiles
- OEM production sites BEV

Market intelligence*

- Premium vehicle market in China
- Exhaust aftertreatment market EU
- Remanufacturing DACH
- Batteries Electric Forklifts market potential USA
- Aluminium die casting market NAFTA & EU
- Battery cover market EU, Asia
- Smart Ex- / Interior Lighting market analysis EU
- Fuel tanks for motorcycles market potential ASIA
- CNG vehicle market Russia

Competitive intelligence*

- Competitor profiles for suppliers of brakes, chassis, SCR tanks, acoustic wedges, resonators, engineering services, etc.
- OEM low cost car production in China
- OEM feature check premium segment
- OEM Organization E/E incl. SW/HW
- Trade Show Intelligence: Tire Technology, Automechanika, Paris Motor Show, IAA, CES, Shanghai Motor Show

Benchmarking*

- OEM R&D procurement organization
- OEM platform and carry over parts analysis
- OEM research and trend transfer
- OEM platform strategy and organization
- OEM & supplier compliance guidelines
- Battery module supply chain & material
- Product cost calculation structural parts
- Product cost calculation seat structure

M&A / Commercial due diligence

- M&A target screening for a German market leader in stainless steel tubes in four countries
- M&A target screening plastic parts supplier
- M&A merger monitoring
- CDD supplier of acoustic parts
- CDD supplier of injection molded parts
- CDD and company valuation automotive logistics service provider

Strategy & foresight

- Growth strategy and foresight: Polycarbonate manufacturer APAC region
- Growth strategy & foresight: Service provider laser welding round parts
- Growth strategy & foresight: Supplier of drivetrain components
- Growth strategy & foresight: Supplier of plastic-metal parts

* Content overlaps between these areas of expertise | CDD = Commercial Due Diligence | OEM = Original Equipment Manufacturer

Why ANP? – Added value for our clients

Your key to success: Our unique combination of seniority, seriousness and discretion, local resources, methodical intelligence know-how, proven technical expertise paired with excellent automotive expertise.

Why ANP?

- We work globally with local teams, proven methods and industry expertise
- We staff every project with the best experts, regardless of location
- We always act flexible, pragmatic, independent and neutral
- Seniority: Average professional experience of our analysts and consultants is 24 years
- We offer excellent value for money with no hidden costs
- We always guarantee the highest level of confidentiality
=> NDA, Fire-Wall-Principle



Added value for our clients

- Securing market decisions and investments
- Sustainable improvement in competitiveness
- Identification of strengths and weaknesses
- Anticipation of opportunities and risks
- Successful market positioning
- Identification of growth opportunities
- Transparent and comprehensible results
- A high level of detailed knowledge, which other market participants are usually unable to provide
- Cost and time savings

Do you have any questions or would
you like to discuss your project with us?

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