

From Automation to Intelligence: How AI is powering the Smart Factory of Tomorrow

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Operational Excellence & Industry 4.0

Europe & Asia

20th November

Barcelona, Spain

Environments
THAT MOVE YOU





Oktoberfest
MUNCHEN





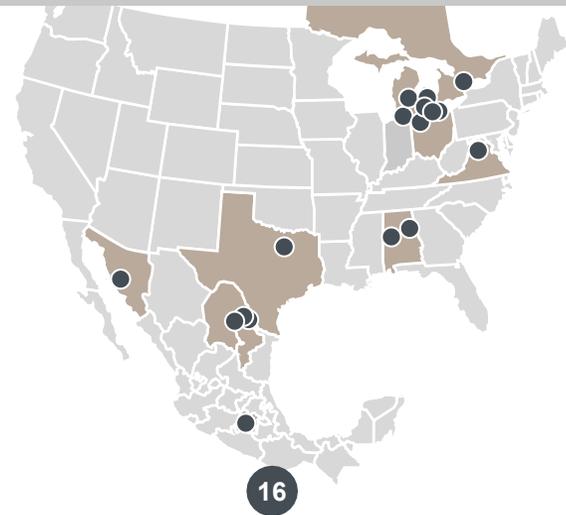
México

PREMIER GLOBAL AUTOMOTIVE SUPPLIER IN KEY-VEHICLE SEGMENTS WITH LEADERSHIP IN CORE PRODUCT CATEGORIES

	Instrument Panel Cockpits & Consoles	Door & Trim Systems	Headliner & Overhead Systems	Painted Exterior & Interior Components
Leading Industry Position	Top 3	Top 3	Top 2	Minor Player
% 2023E Sales	39%	38%	15%	8%
Key Customers				
Product Examples				

GLOBAL LOCATION OVERVIEW

IAC is headquartered in Luxembourg, operates in 17 countries across the world, and employs over 18,000 people



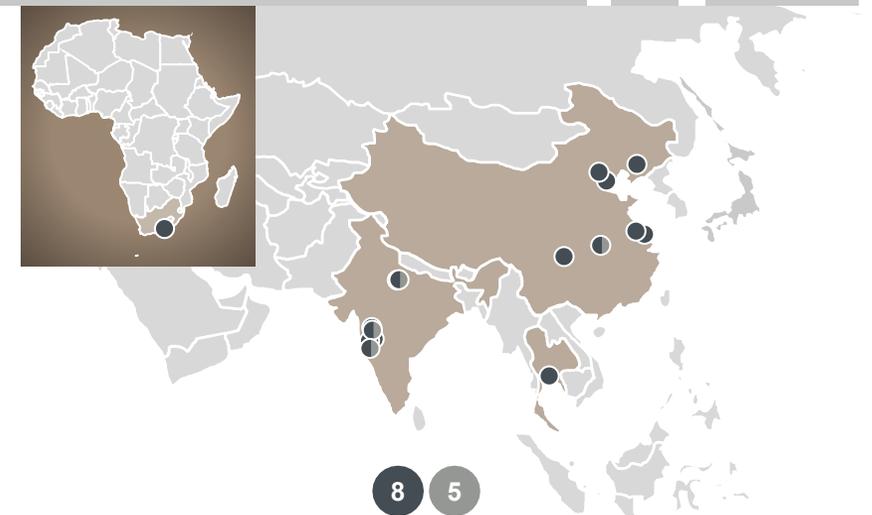
NORTH AMERICA¹
~8,800 employees

- Anniston, AL
- Arlington, TX
- Alma, MI
- Mendon, MI
- Port Huron, MI
- Warren, MI
- Wauseon, OH
- Strasburg, VA
- Cottondale, AL
- Maple, ON
- Windsor, ON
- Hermosillo, MX
- Monterrey, MX
- N. Monterrey, MX
- Toluca, MX
- Saltillo, MX



EUROPE
~8,000 employees

- Hodonin, CZ
- Prestice, CZ
- Prestice II, CZ
- Plattling, DE
- Zwiesel, DE
- Born, NL
- Lozorno, SK
- Logrono, ES
- Färgelanda, SE
- Lassby, SE
- Skara, SE
- Elmdon, UK
- Halewood, UK
- Scunthorpe, UK
- Opole, PL



ASIA | AFRICA
~1,000 employees

- East London, RSA
- Beijing, CN
- Changchun, CN
- Chongqing, CN
- Hangzhou, CN
- Shanghai, CN
- Tianjin, CN
- Rayong, TH
- Wuhan, CN
- Chakan I, IN
- Chakan II, IN
- Manesar, IN
- Nashik, IN

● 41 Manufacturing Facility ● 5 Joint Venture

GLOBAL MARKET LEADER IN ATTRACTIVE PRODUCT CATEGORY

Importance of auto interiors as a key differentiator influencing buying decisions



~50%

of U.S. customers perceive interior as “very important”



~71%

of auto executives expect interior customization to be more important over the next 5 years...



~22%

expected rise in Interior Content Per Vehicle (CPV) by 2030



~3-4%

N. America ~3.2% CAGR over next 5 years (~\$21B market); Europe ~4.0% CAGR over next 5 years (~\$25B market)

OEMs are focused on installing premium interiors and refreshing interiors regularly in order to attract consumers, which has led to increasing investment dollars towards interiors

More capital being spent by customers to differentiate, lessen mass, enrich customer experience

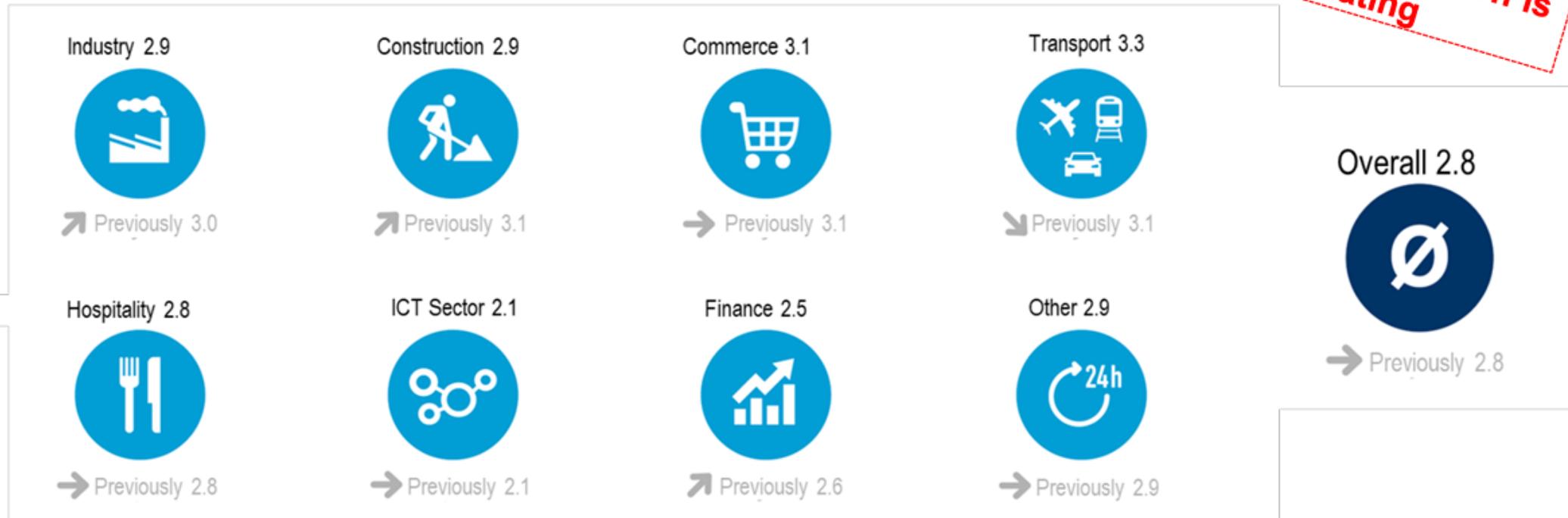
Source: McKinsey Study – April 2021; Ducker Worldwide

DEGREE OF DIGITALISATION BY SECTOR

Bavaria

Degree of Digitisation by sector
Bavaria 2024; 1 = very good to 6 = insufficient

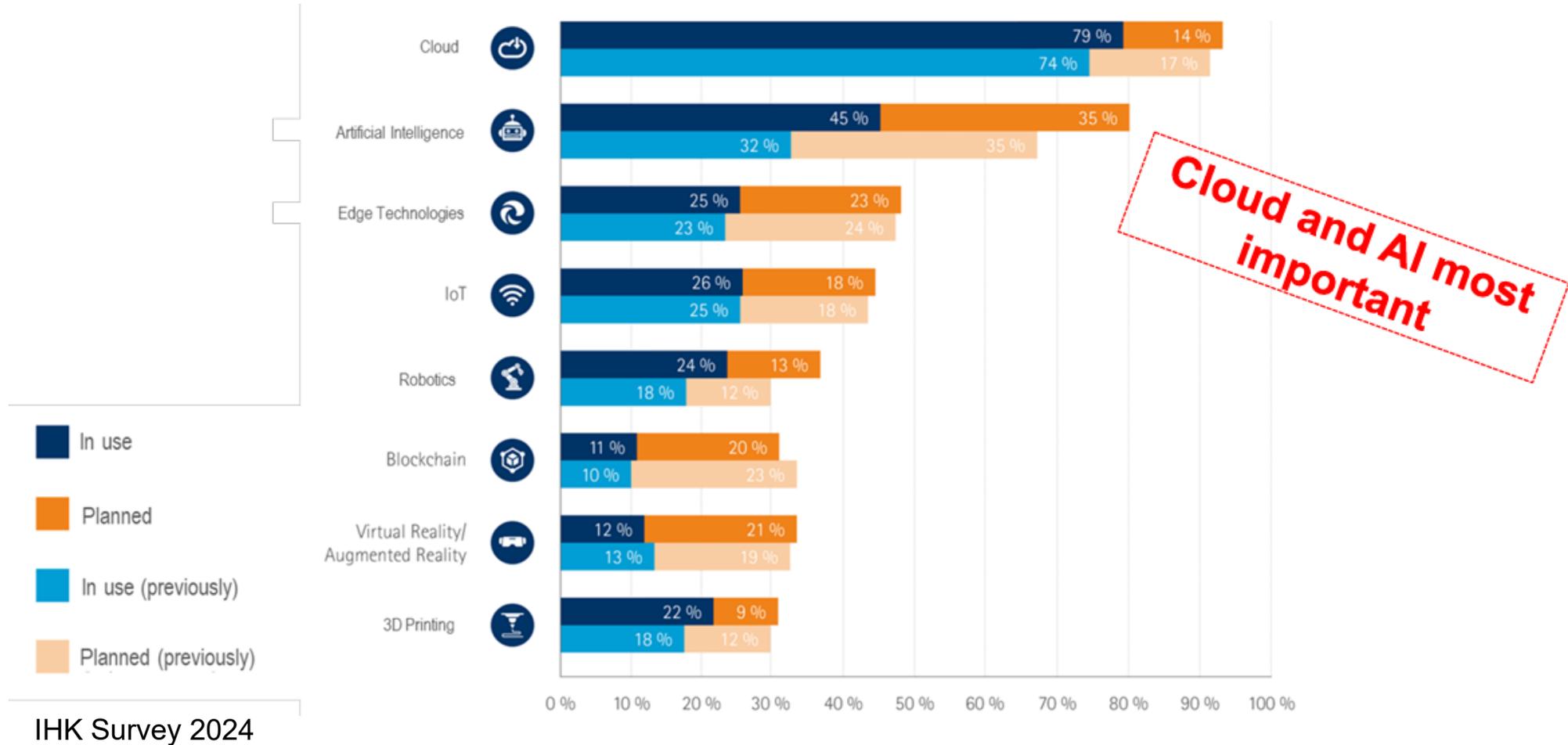
Degree of digitalisation is stagnating



IHK Survey 2024

TECHNOLOGIES USED WITHIN COMPANIES

Bavaria



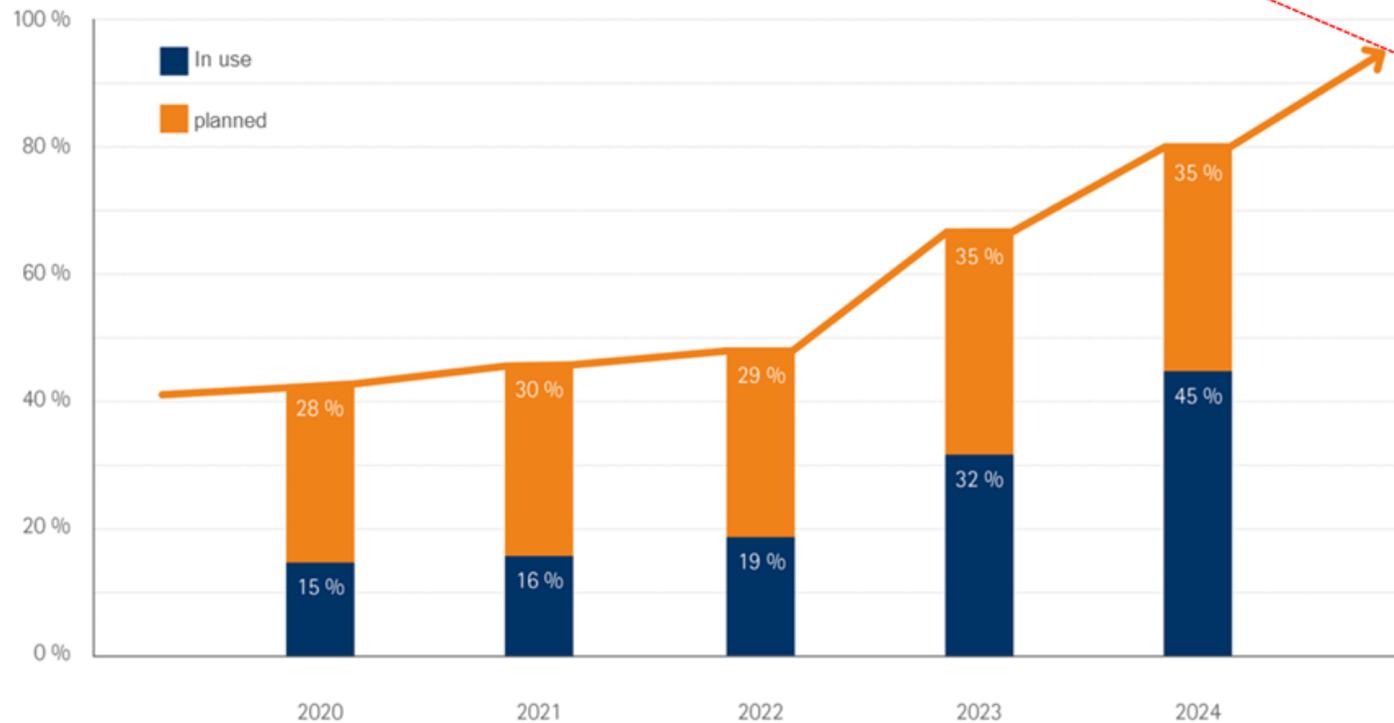
DEVELOPMENT OF AI USE IN COMPANIES

Bavaria

Do you use AI/ML in your company or are you planning to use it within the next three years?

Development of the AI use in companies from 2020 to 2024

Bavaria 2024



AI surge unabated since 2023

IHK Survey 2024

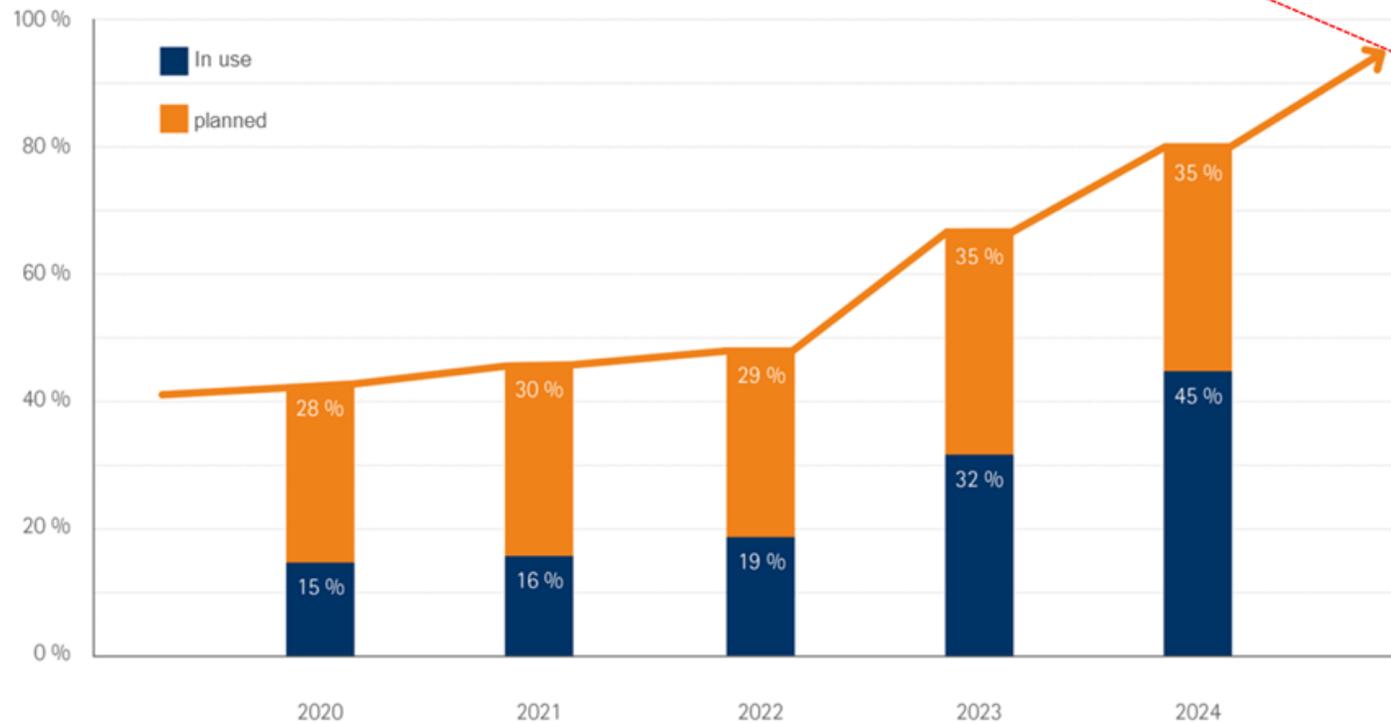
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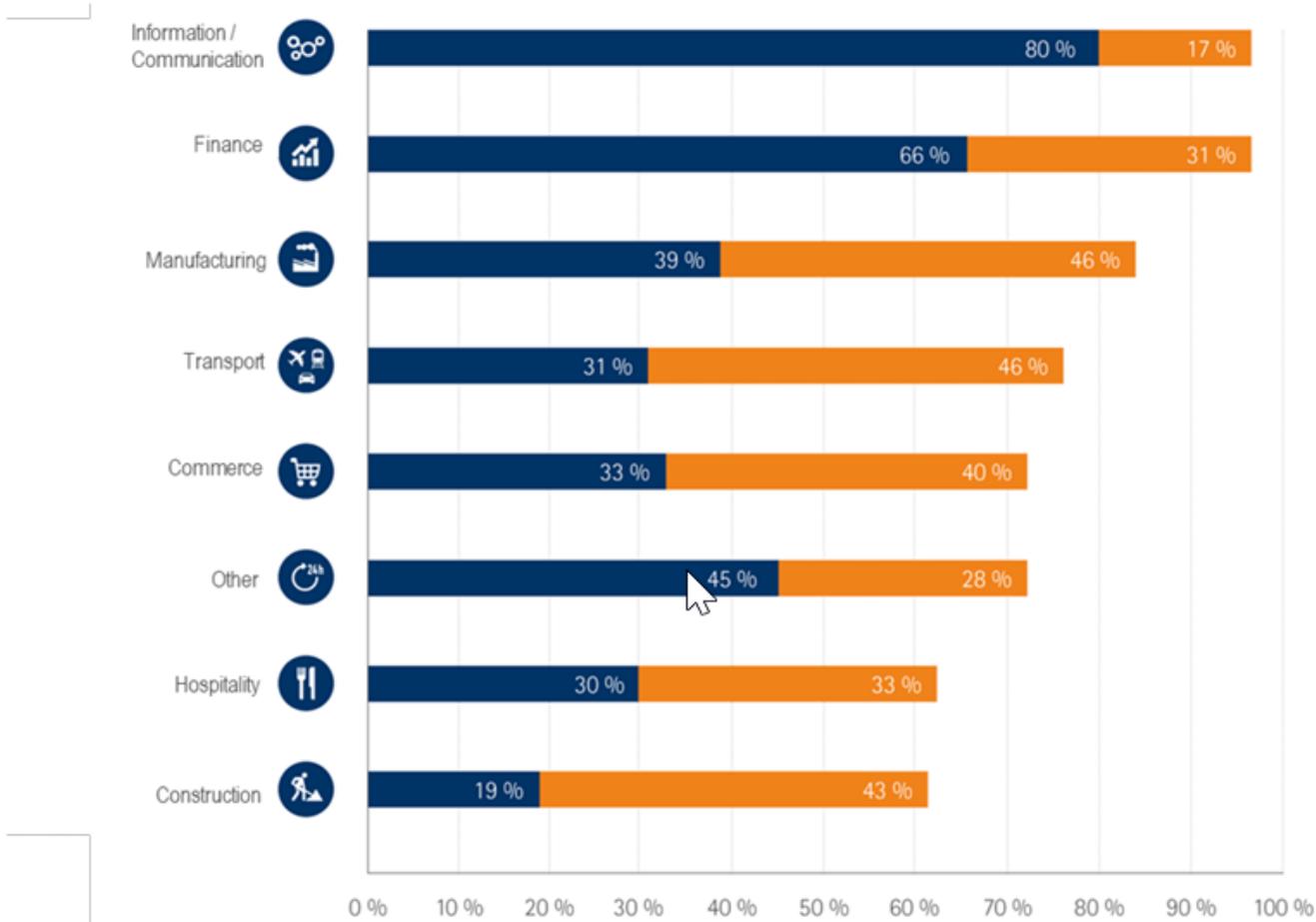


AI surge unabated since 2023

IHK Survey 2024

AI USE WITHIN COMPANIES BY SECTOR

Bavaria

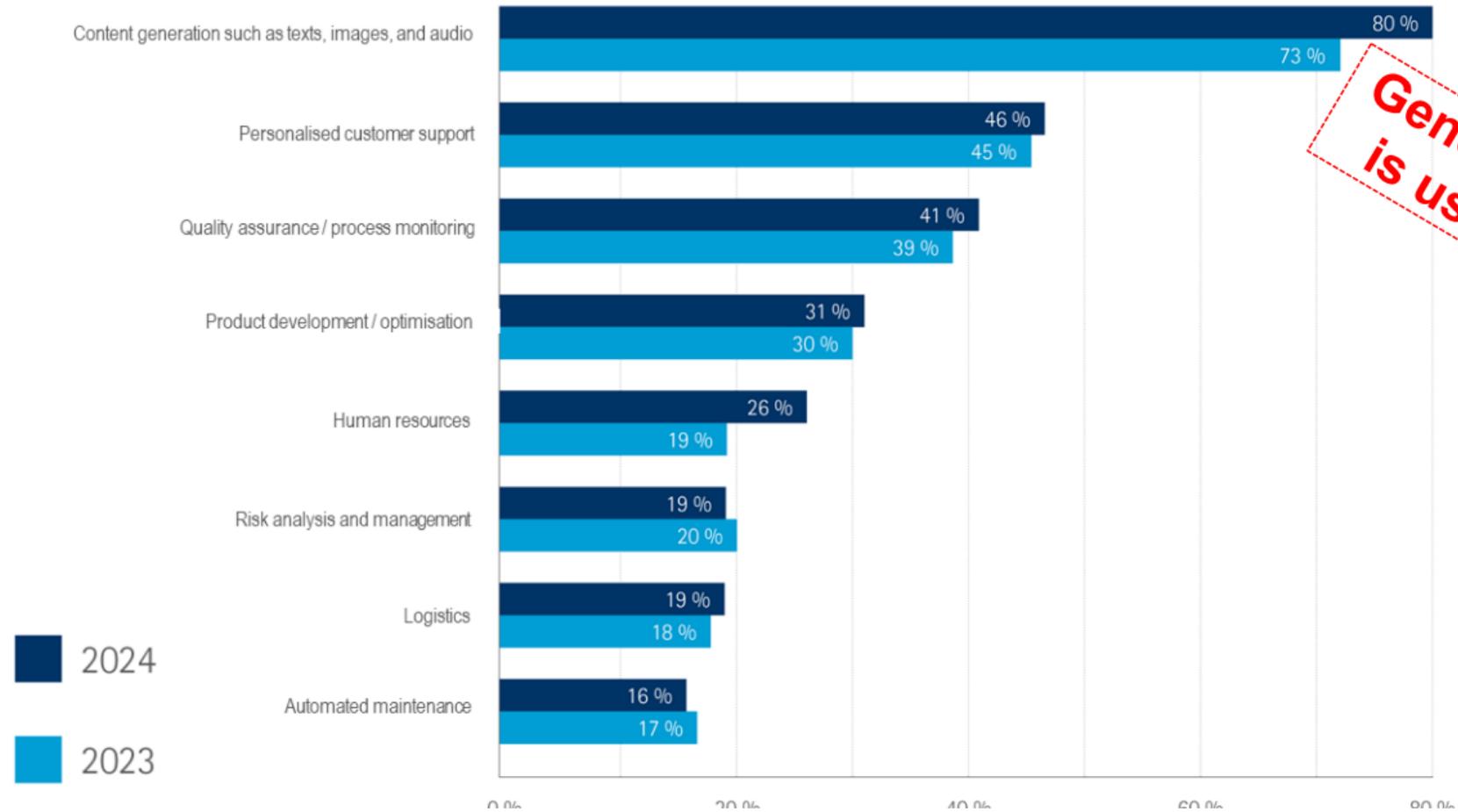


ICT sector uses AI the most

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FIELDS OF APPLICATION OF AI IN COMPANIES

Bavaria

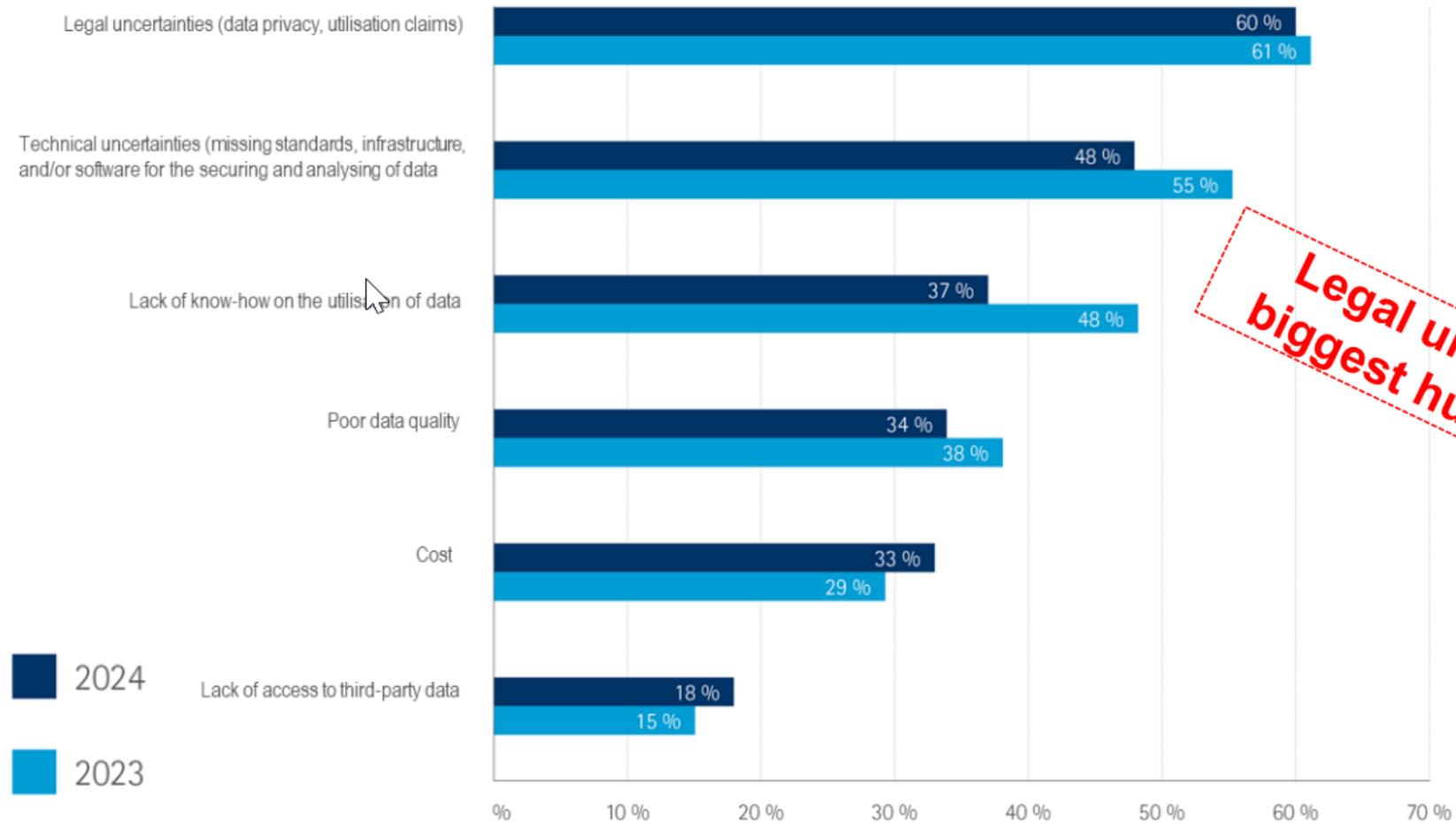


**General purpose AI
is used above all**

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BIGGEST CHALLENGES FOR COMPANIES WHEN USING DATA

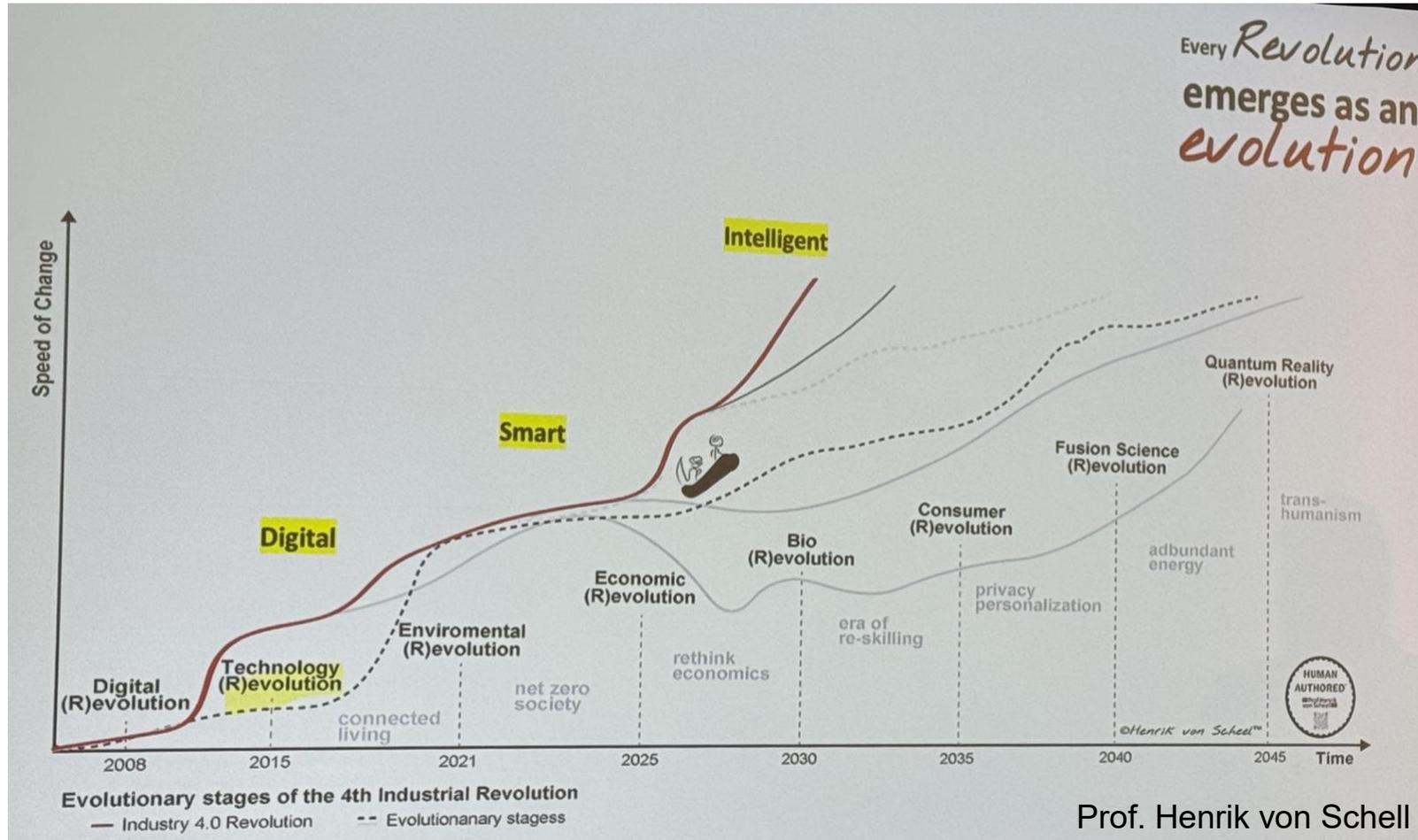
Bavaria



Legal uncertainties are the biggest hurdle for data usage

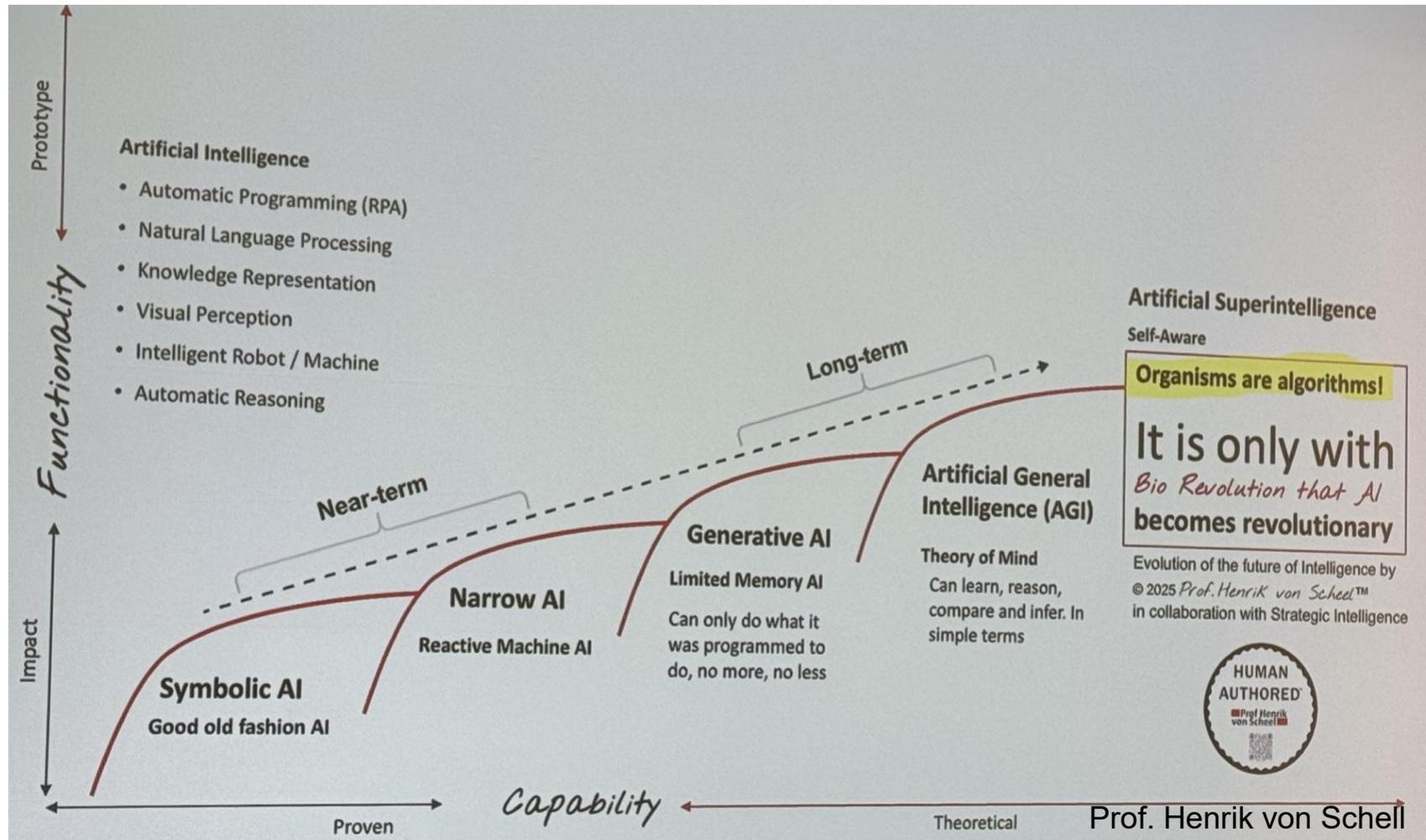
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Evolutionary stages of the 4th Industrial Revolution

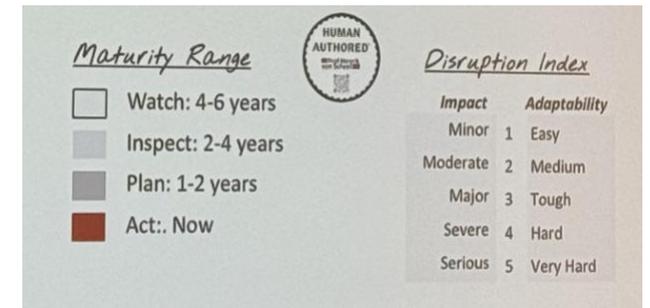
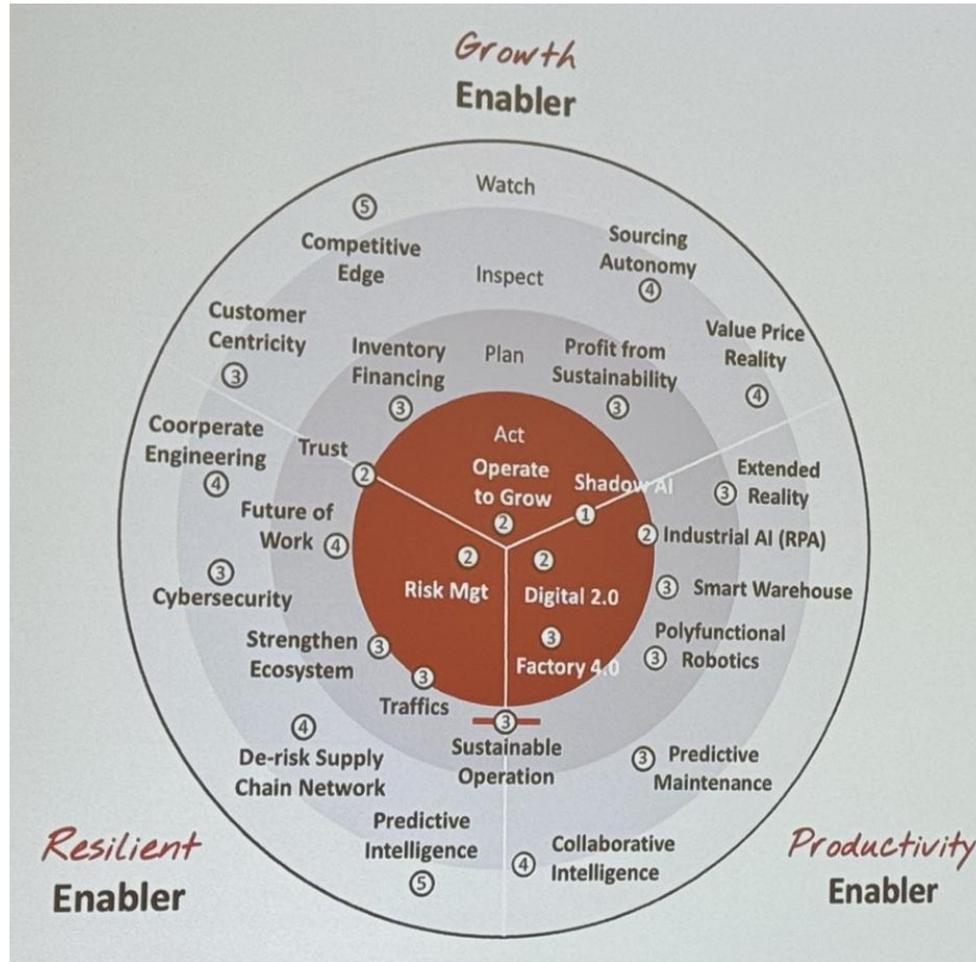


Reality check on Artificial Intelligence

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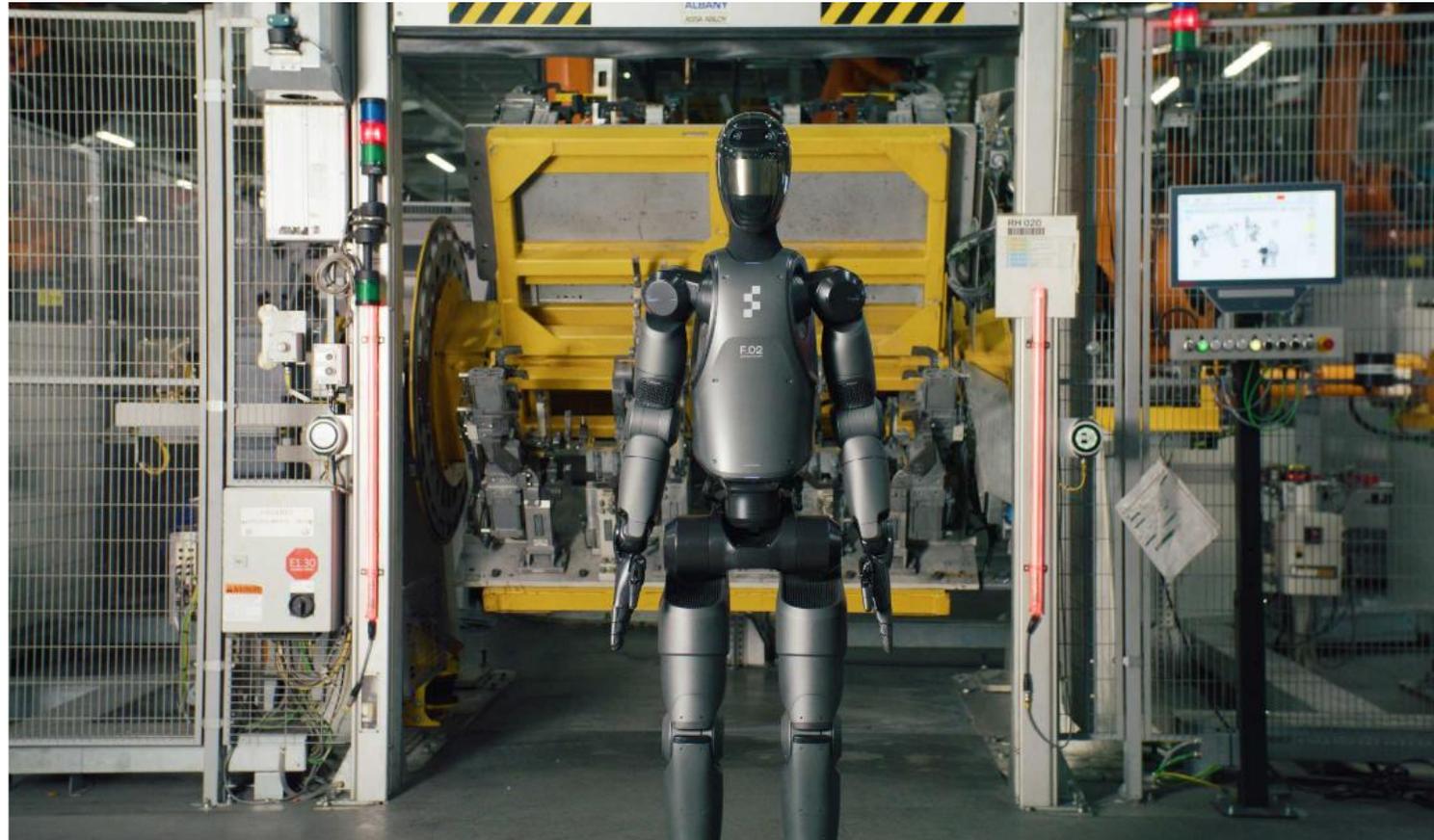


Manufacturing trend radar

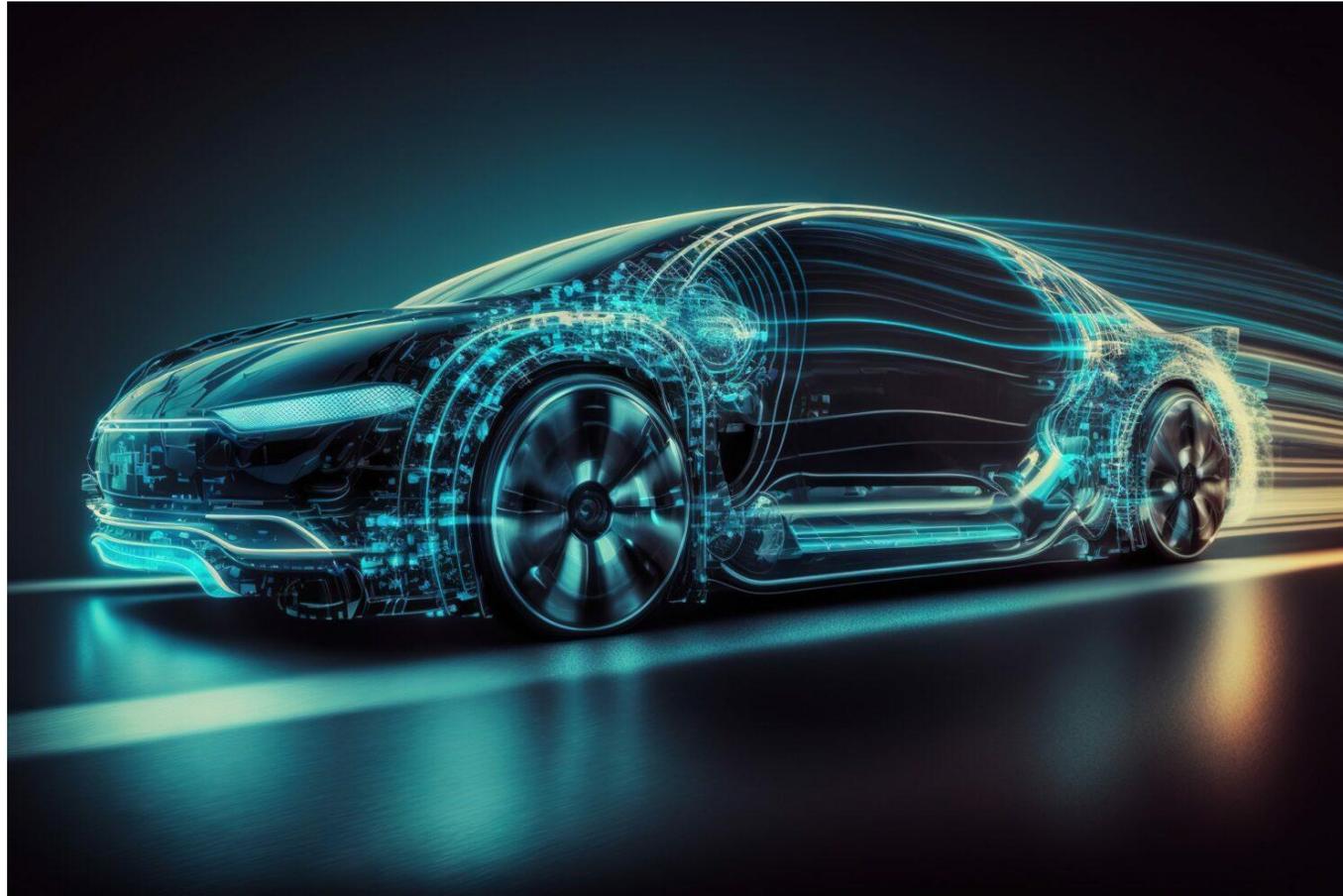


Prof. Henrik von Schell

MAIN TRENDS IN AUTOMOTIVE



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Strategy & Transformation Management
Operational Excellence, Smart Factory, Industry 4.0

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