Inside China: Understanding Current and Future Trends in the Chinese Auto Industry

“Focus on the Future”
UM Automotive Research Conferences

WELCOME!

Link to Presentations Will Be Sent This Weekend

Bruce M. Belzowski
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<th>IT Organisations</th>
<th>Government/NGOs</th>
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<tbody>
<tr>
<td>Oracle Corporation</td>
<td>NREL / EPA</td>
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<td>IBM</td>
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<td>General Motors</td>
<td>National Resources Defense Council</td>
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<td>Union of Concerned Scientists</td>
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<td>Nissan Tech Center</td>
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Automotive Analysis
University of Michigan
Transportation Research Institute

Affiliates Members and Research Partners

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- Chevron
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- Continental
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- Valeo

**Suppliers**
- Michelin
- Continental
- JCI
- BorgWarner
- Yazaki
- Eaton
- BASF
- Dow
- Bosch
Upcoming UMTRI-AA Conferences

- February 12, 2014 (Wednesday): *Automotive Safety: How Will Connected and Autonomous Vehicles Affect Automotive Safety?* This conference is a follow-up to our 2011 Automotive Safety conference. Since that time, there has been major technological progress in the areas of connected and autonomous vehicles. This conference will review what has happened to date, and what experts see for the next 5-10 years.
Upcoming UMTRI-AA Conferences

• **April 16, 2014 (Wednesday):** *Inside Russia: Understanding the Current and Future Russian Automotive Industry.* Russia is the final BRIC market in our study of the globalization of the auto industry that is expected to be a growth market for automakers in the future. This conference will provide insight into how government, industry, and consumers view the current and future Russian automotive market.

• **July 23, 2014 (Wednesday):** *Powertrain Strategies for the 21st Century.* Our 6th annual conference that provides insight into how manufacturers and suppliers are managing their resources to meet the needs of consumer while meeting government requirements.
Upcoming UMTRI-AA Conferences

**The UM Alumni Discount**

Alumni who sign up in advance for five conferences in a row receive a $250 discount
Panelists

AM Session

• **Frank Zhao**, Professor and the Director of Automotive Strategy Research Institute at Tsinghua University

• **Frank Xing**, Chief Editor of *China Automotive Review* and China Business Update

• **Susan Zielinski**, Managing Director of SMART (Sustainable Mobility & Accessibility Research & Transformation),
Panelists

PM Session

• **Yingzi Su**, senior economist at General Motors

• **Tiger Lu**, executive vice president of Sanhua Automotive USA

• **Jinyun Liu** is the Director of the Center for China Employment and Labor Relations at the University of Michigan
Morning Schedule

• 9am
  – Bruce Belzowski
  – Frank Zhao (Q&A)
  – Wayne Xing

• 10:35am-10:50am Break

• 10:50am
  – Sue Zielinski

• 11:25am-Noon AM Session Q&A

• Noon-1:30pm Lunch
Afternoon Schedule

- 1:30pm
  - Yingzi Su
  - Tiger Lu
- 2:40pm-2:50pm Break
- 2:50pm
  - Jinyun Liu
- 3:25pm-4:00pm PM Session Q&A
- 4:00pm Adjourn
Conference Questions

• At what stage of development is the Chinese auto industry? Are any Chinese manufacturer vehicles competitive with world class vehicles?

• How are the independent Chinese manufacturers faring compared to the Chinese manufacturers who are joint ventured with foreign manufacturers?

• What are the prospects for manufacturer consolidation?
Conference Questions

• What advantages and disadvantages do Chinese suppliers have as they move from China to developed countries to sell products?

• How are Chinese suppliers developing new innovative products to compete with global suppliers?

• Will we see Chinese manufacturers and suppliers building vehicles or components in the US?
Conference Questions

• What are the consumer trends in vehicle purchasing?
  – How long are consumers keeping their new vehicles?
  – How are purchase restrictions affecting sales in the major cities?
  – What types of vehicles are the most popular in China?
  – What percent of sales are from foreign and domestic manufacturers?
Conference Questions

• What are the local governments doing to deal with vehicle congestion?

• How quickly is the national government responding to the need for alternatives to driving, especially in the larger cities?

• How is the general population responding to alternative forms of transportation?
Conference Questions

• How are rising wages affecting working conditions in China?

• How are workers organizing to improve working conditions?

• How do their organizing methods differ from those of organized labor in other countries?
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