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Perspectives of a Global OEM: The Volkswagen Group in Latin America

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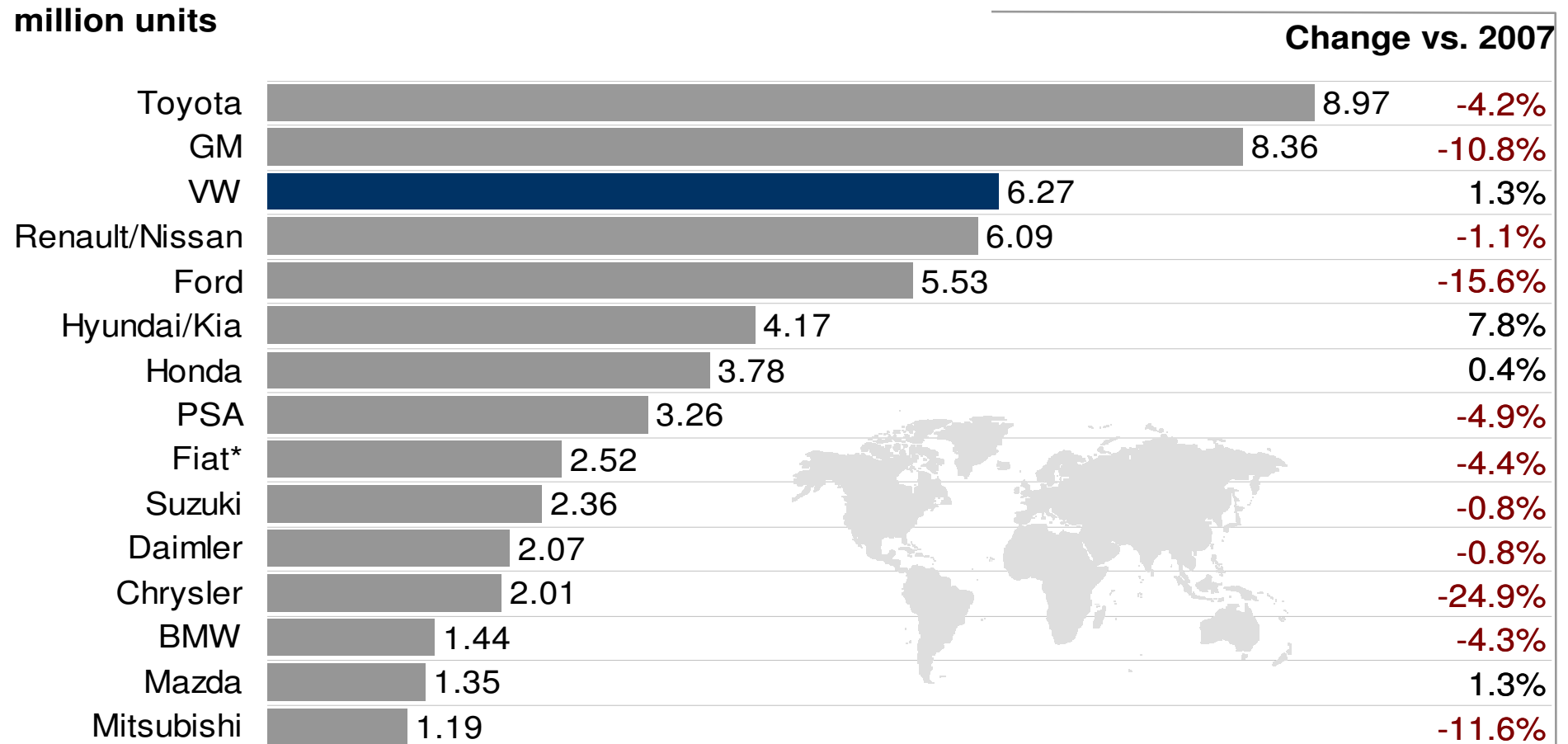


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World Automotive Industry Sales Ranking 2008



*) incl. associated companies

Volkswagen Group

Volkswagen Group 2008



Production: 6.347.000 vehicles
Production Plants: 61 worldwide
Employees: 369.900
Models: 180

Mexico 2008

Production: 450.000 vehicles
Production Plants: 1
Employees: 13.500
Models: 5

Argentina 2008

Production: 50.000 vehicles
Production Plants: 3
Employees: 5.400
Models: 3

Brazil 2008

Production: 717.000 vehicles
Production Plants: 6
Employees: 22.200
Models: 7

Total Market Comparison YTD August 2008 / 2009



- 14%



- 28%



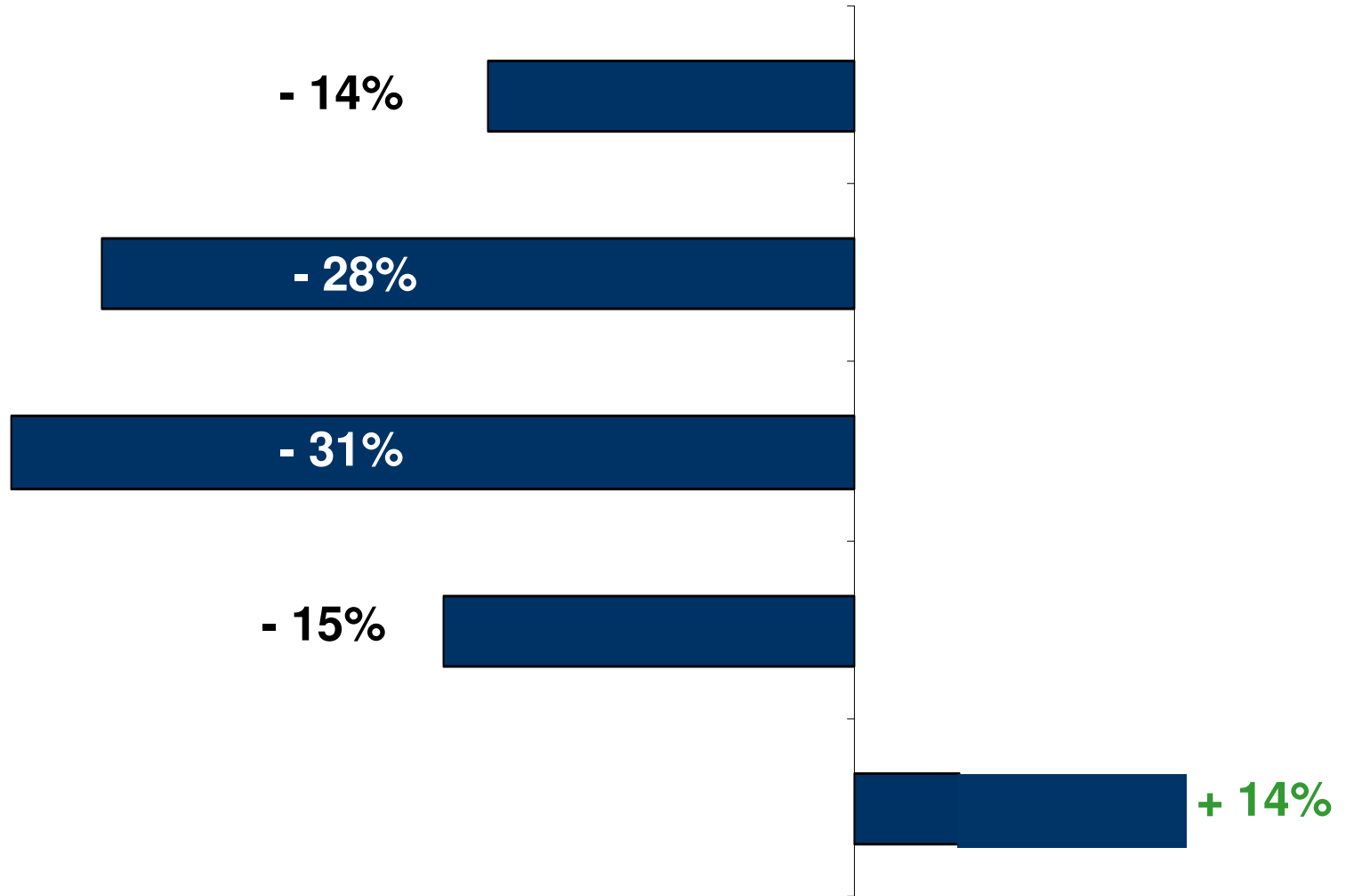
- 31%



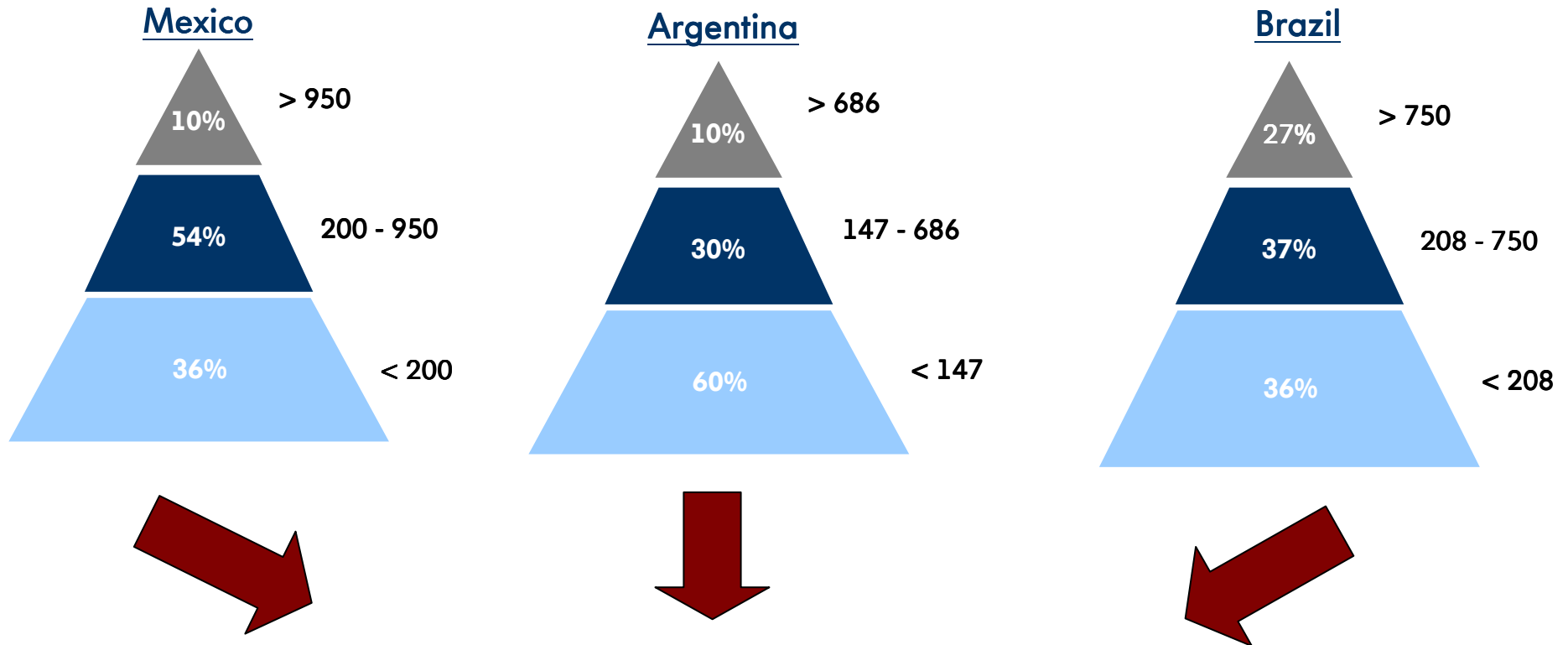
- 15%



+ 14%



Households with Car Purchasing Ability (US\$)



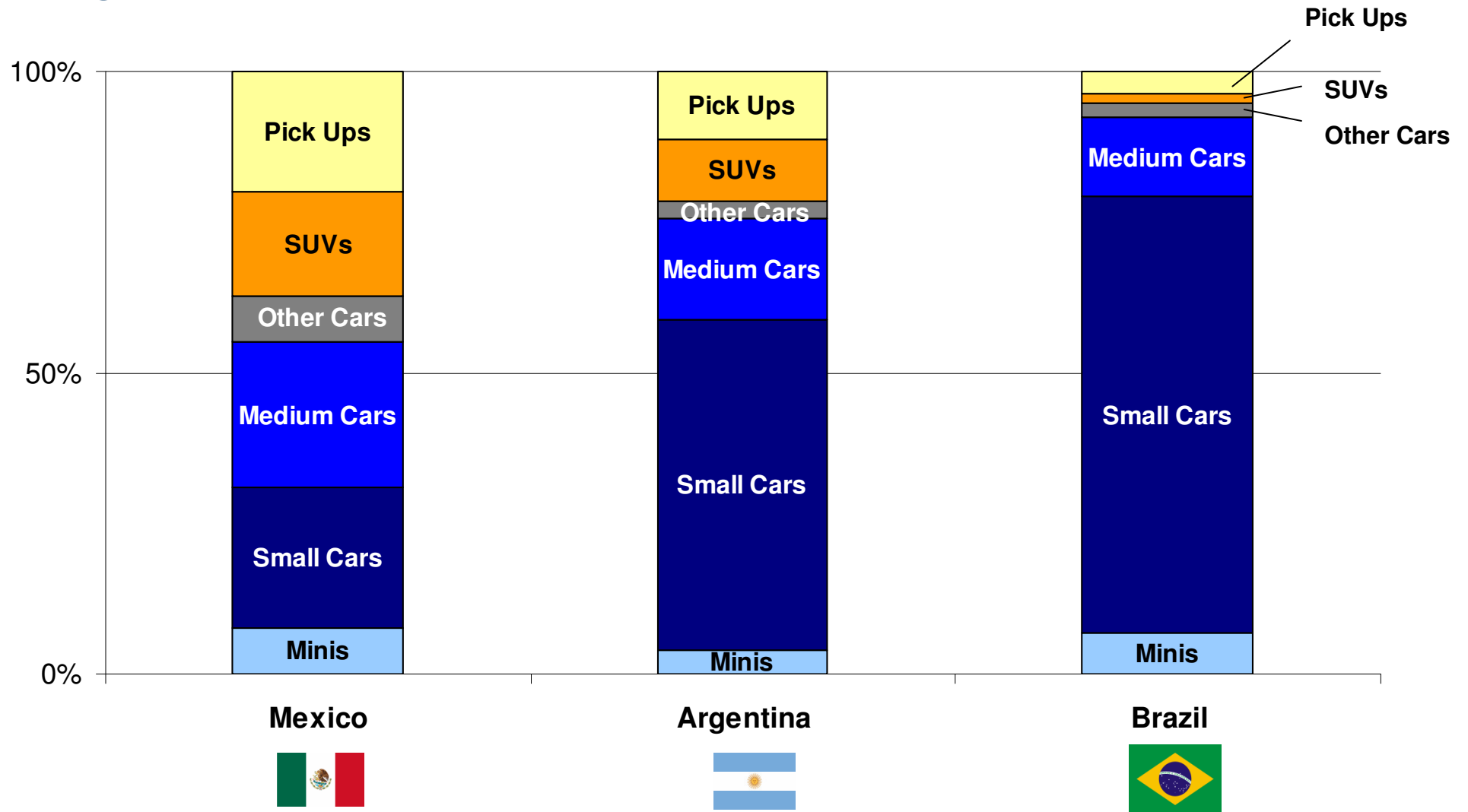
Who can afford a new car?

Mexico 10%

Argentina 10%

Brazil 27%

Segmentation



Locally Produced Volkswagen Models



- Jetta A5
- Bora A4
- Golf Variant
- New Beetle
- New Beetle Convertible

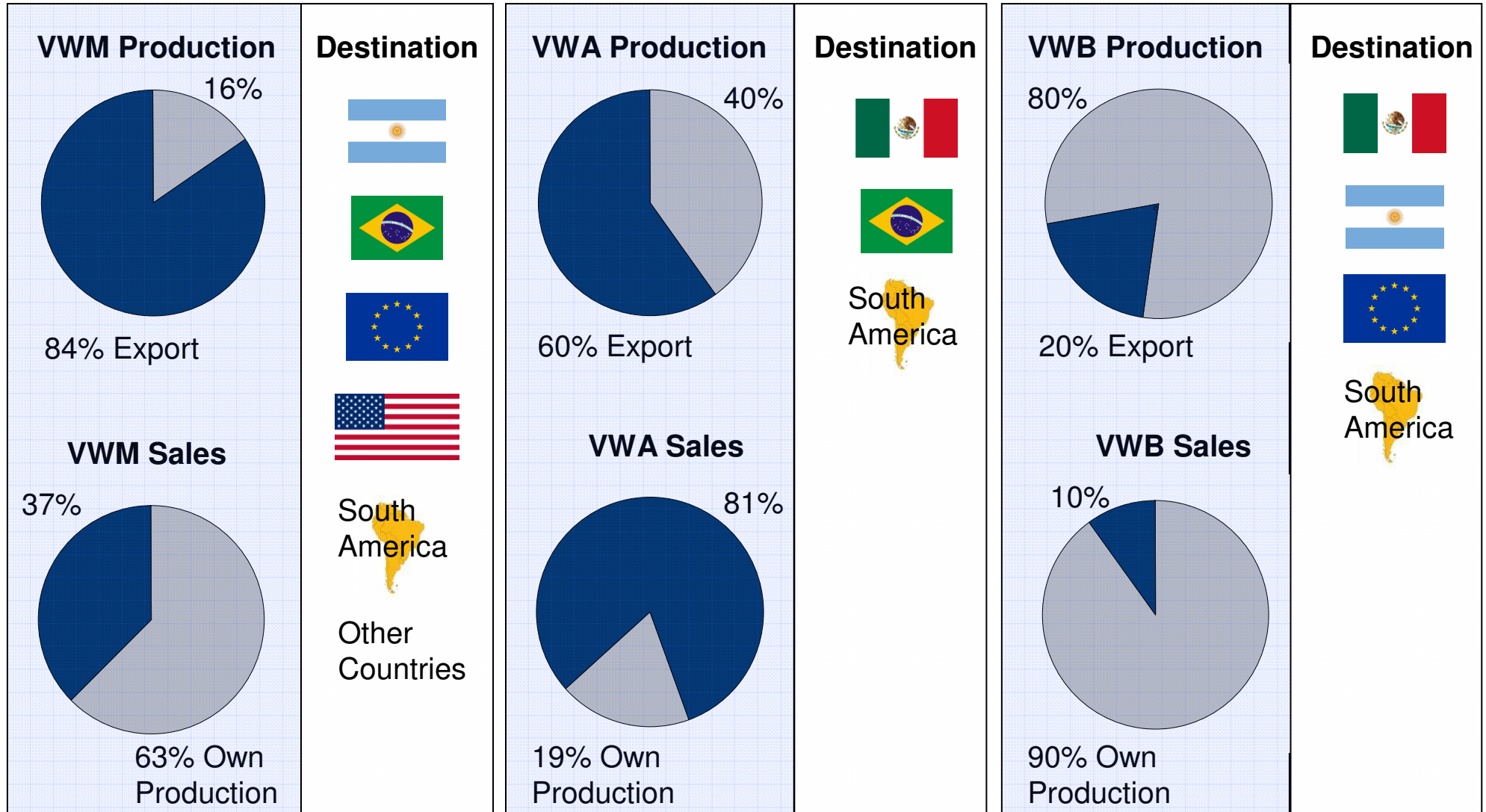


- Fox
- Gol / Voyage
- Golf IV
- Polo Sedan IV
- Polo Hatch IV
- Parati
- Saveiro
- T2, buses and trucks

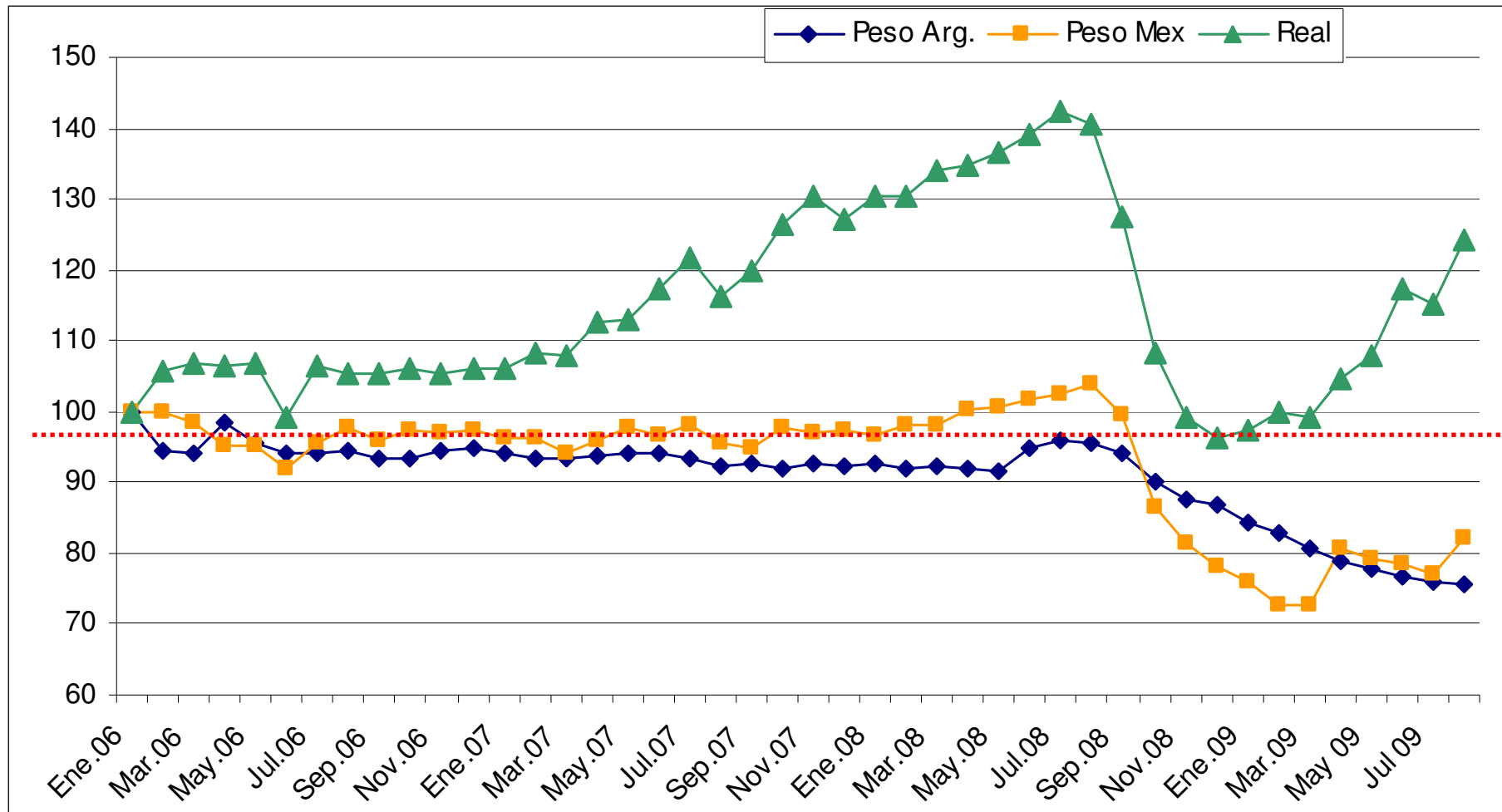


- Suran
- Polo Hatch IV
- Caddy 2

Destination of Production and Source of Sales



Exchange Rate USD vs. Peso Arg., Peso Mex. and Real



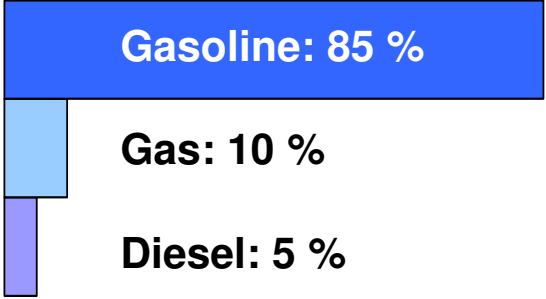
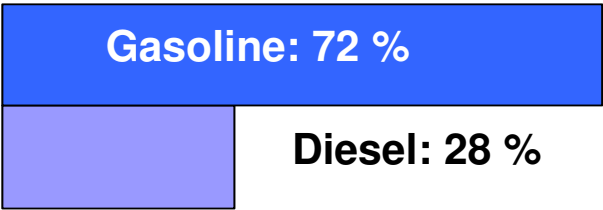
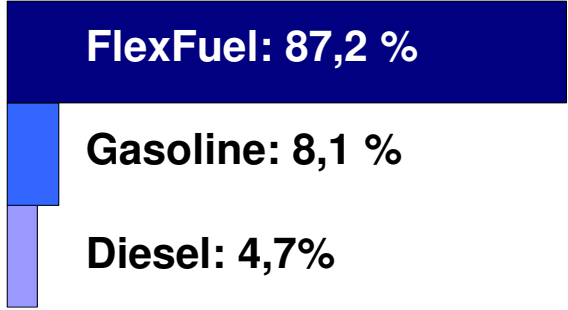
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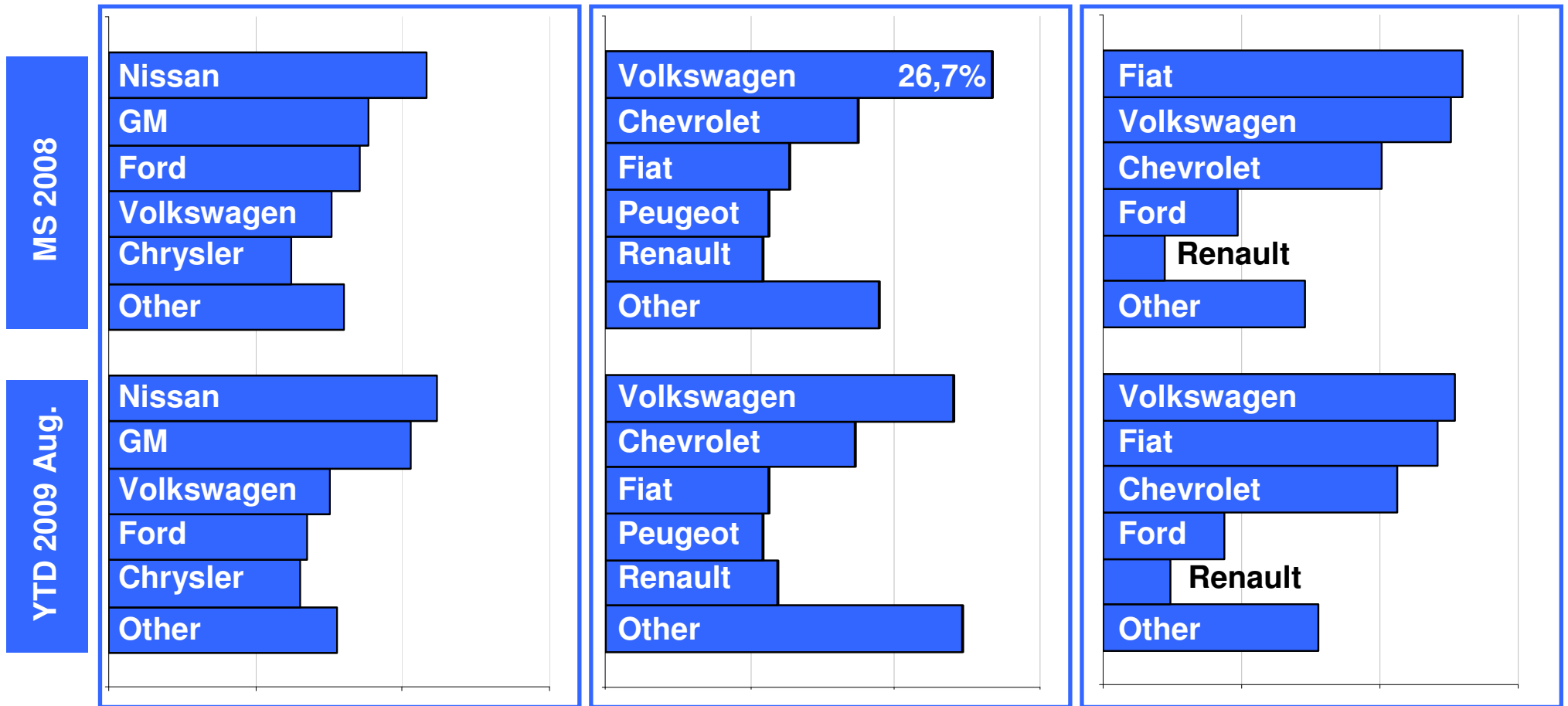


Fuel Requirements are Different



Fuel Type	 <p>Gasoline: 85 % Gas: 10 % Diesel: 5 %</p>	 <p>Gasoline: 72 % Diesel: 28 %</p>	 <p>FlexFuel: 87,2 % Gasoline: 8,1 % Diesel: 4,7%</p> <p>Quelle: ANFAVEA</p>
Prices per Liter	<p>Gasoline: 0,58 USD (as at August 2009)</p>	<p>Gasoline: 0,84 USD (as at September 2009)</p>	<p>Alcohol: 1,08 USD Gasoline: 1,35 USD (as at September 2009)</p>

Main Competitors



Note: Mexico by Group, Argentina and Brazil by Brand

Future Developments

VW - Amarok



Thank you very much for your attention!

