

Supplier – Manufacturer Challenges: Lessons from the Auto Industry

Dennis Cuneo
Arent Fox LLP
Former Senior Vice President
Toyota Motor North America

Sherry Welsh
Vice President
Global Sales & Marketing
ArvinMeritor LVS

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Tier 1 Suppliers



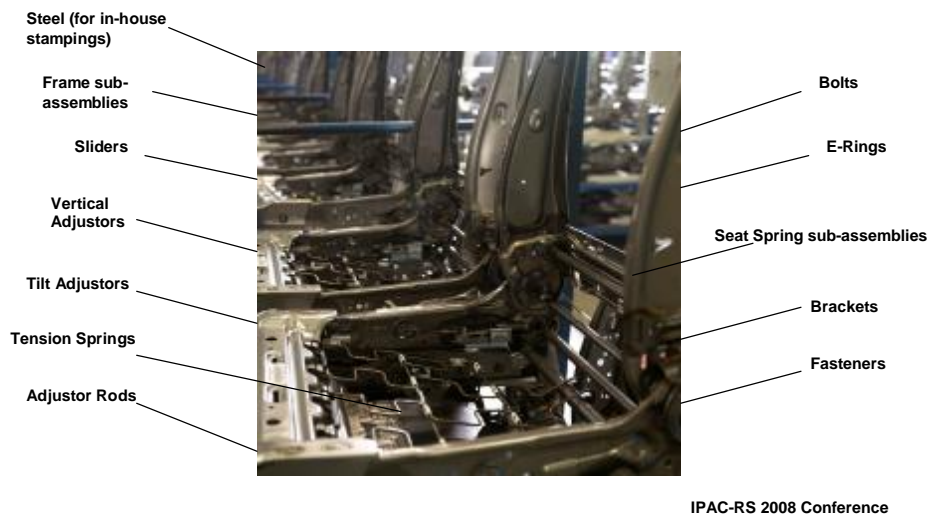
Tier 2 Suppliers

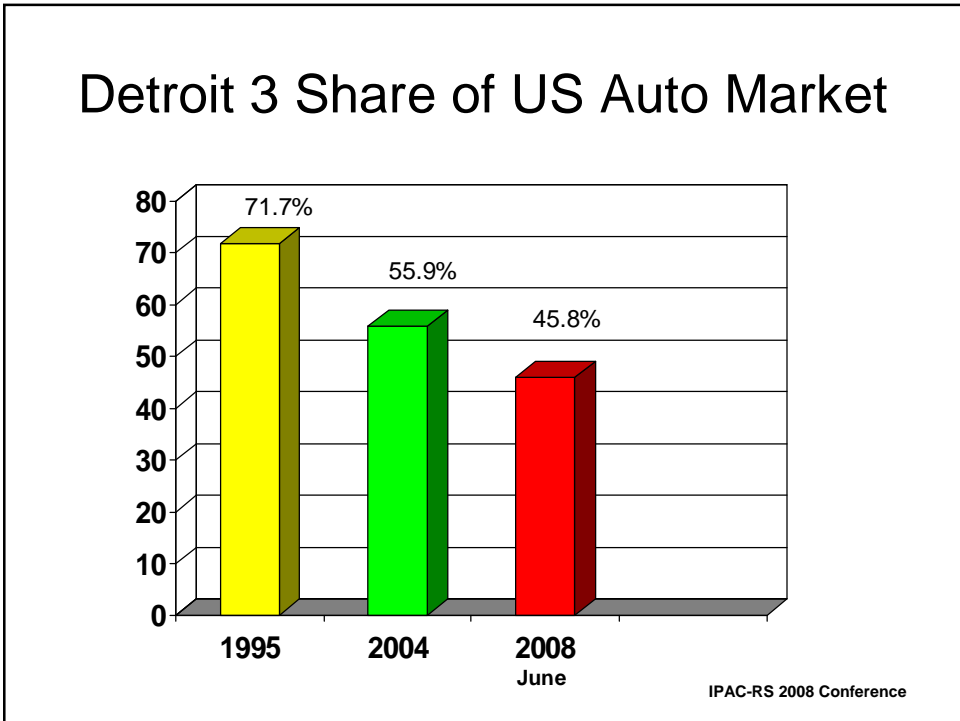
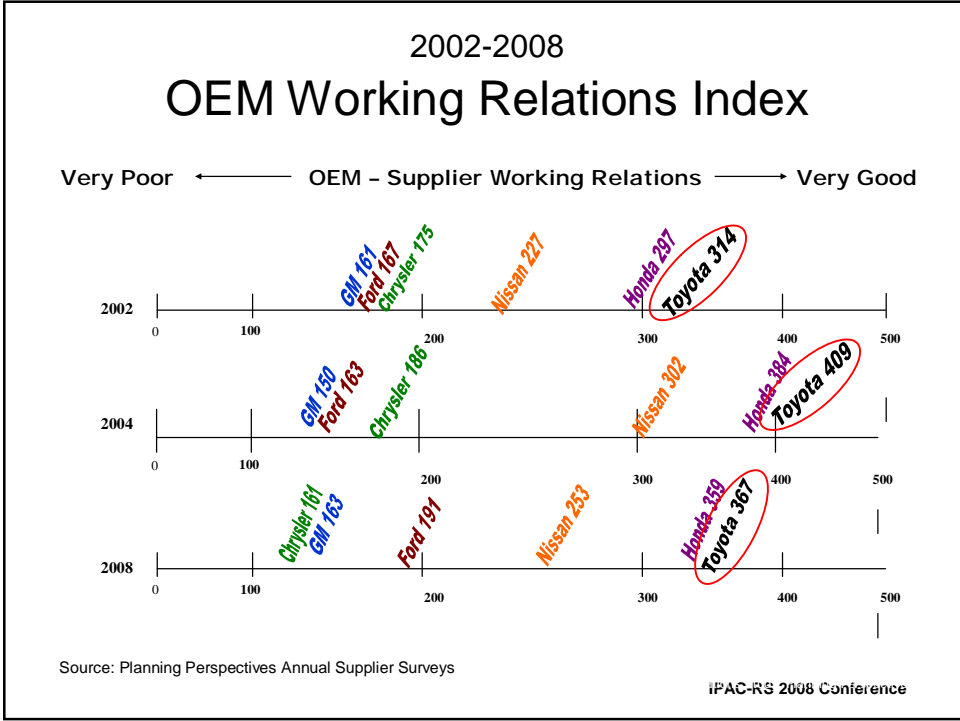
Typical Parts For Seat Assembly



Tier 3 Suppliers

Typical Parts For Seat Frame Assembly

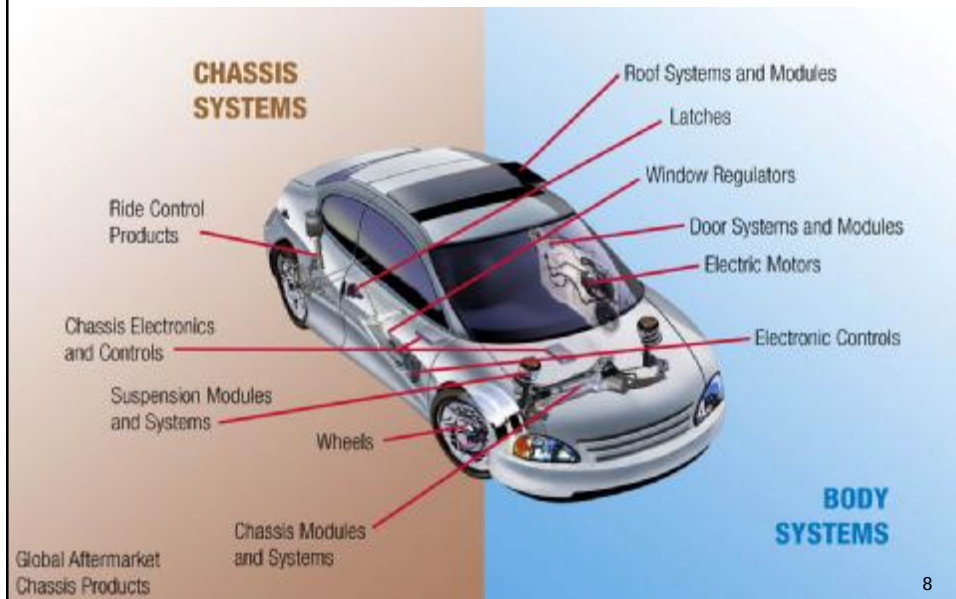




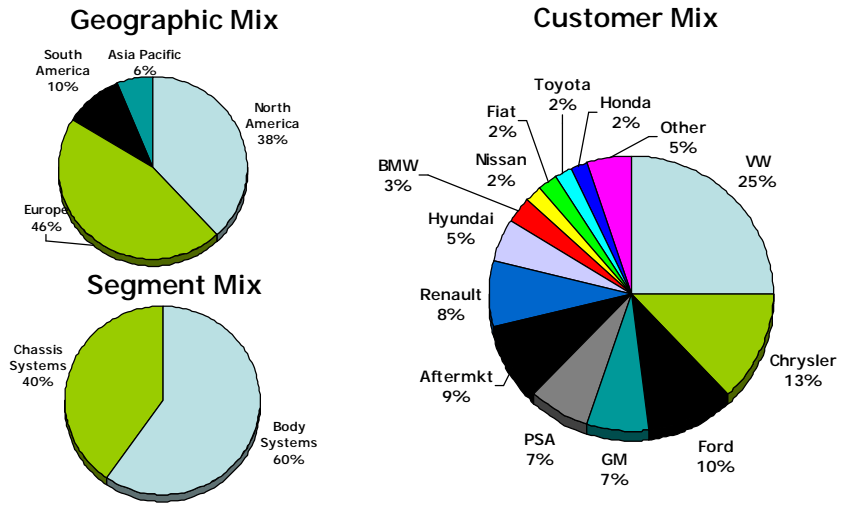
Sherry Welsh
Vice President, Global Sales & Marketing
ArvinMeritor
Light Vehicle Systems

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World Leader in Body and Chassis



Diverse and Robust Business Portfolio LVS 2007 Value-Added Sales



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Auto Industry and Supplier



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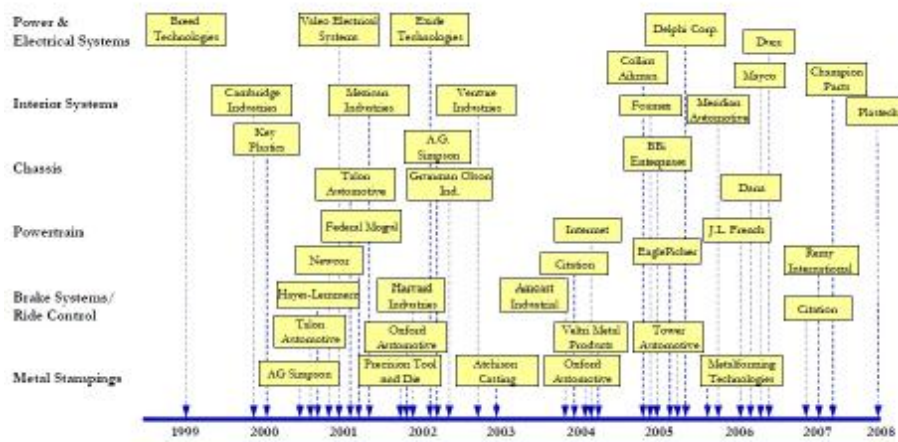
The Supplier Table of Pain

Industry PPI/CPI/ECI	1998-2005 % Change
New Cars and Trucks CPI	-3.5%
Motor Vehicles Manufacturing Price Index PPI	-1.9%
Motor Vehicle Parts PPI-Commodities	-0.8%
Cold Rolled Steel AMM-Midwest	+32.3%
Hot Rolled Steel AMM-Midwest	+58.5%
Primary Aluminum PPI	+24.5%
Plastic Materials & Resins PPI	+53.8%
Refinery Gases (Feedstock) PPI	+203.9%
Petroleum Refineries PPI	+179.2%
BLS ECI Health Cost	+75.0%

Source: BLS

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Auto Supplier Bankruptcies (1999-2007)



Source: Jefferies & Ducker Worldwide

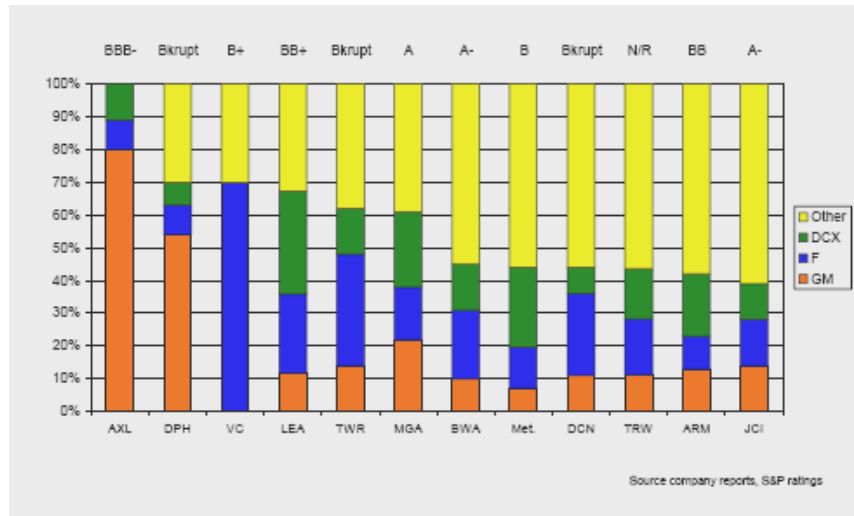
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Auto Industry and Supplier Relations



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Customer Concentration and Market Rating



Center For Automotive Research

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