

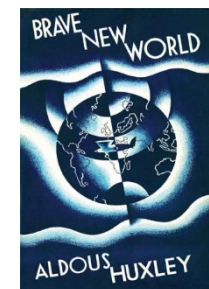


Bilbranchen 2025

- fagre nye verden?

Dækbranchen Danmarks Temadag

Taastrup, 20. september 2016



22 år i bilbranchen...

- **General Motors**
 - ✓ Product Manager, GMAC (DK, UK)
 - ✓ Intl. Management Programme (UK, USA, Puerto Rico, Italien)
 - ✓ Adm. direktør, GMAC Danmark
 - ✓ Adm. direktør, GM Danmark
- **Uggerhøj A/S** (10 detailforretninger)
 - ✓ Medejer, direktør
- **Bilernes Hus A/S** (Nordeuropas største bilhus)
 - ✓ Medstifter, Adm. direktør
- **DI Bilbranchen** (Brancheforening)
 - ✓ Direktør
- **udvikling a/s** (strategisk rådgivning til bilbranchen siden 2005)
 - ✓ Stifter, direktør
- **AutoInc A/S** (udviklingsselskab for internationale aktiviteter)
 - ✓ Initiativtager, direktør
- **Auto Strategy** (analyser og nyhedsbreve)
 - ✓ Stifter, direktør



*René Tønder
Direktør,
udvikling a/s*

At spå om fremtiden...

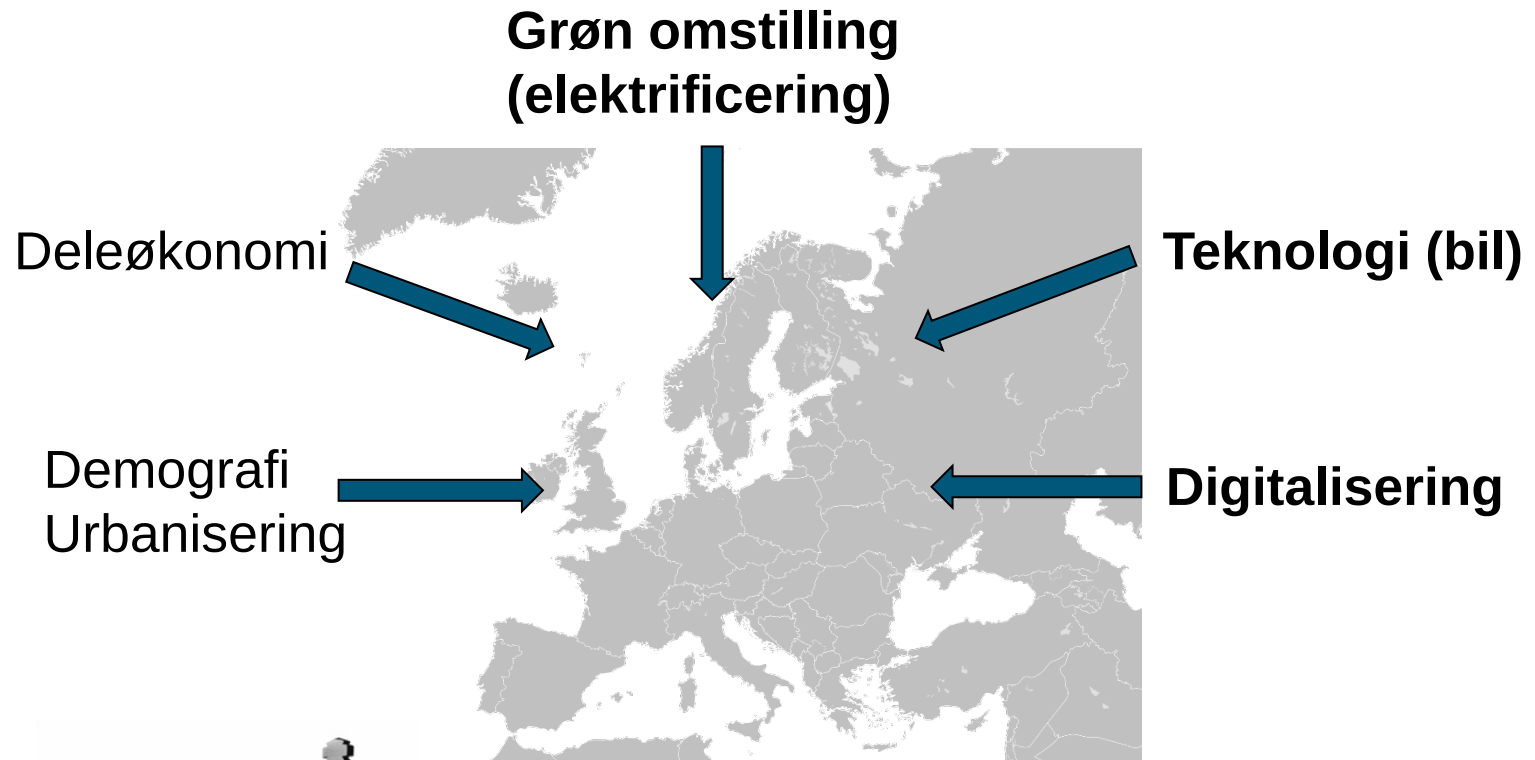
Bilforhandleren 2015

UDVIKLING I AUTOBRANCHEN



- Beskatning
- Online kommunikation
- ✓ Olie og klima
- ✓ Overproduktion
- ✓ Teknologisk udvikling
- ✓ Importørens position
- ✓ Markedet
- ✓ Konsolidering
- ✓ Mellemstore forhandlere "klemmt"
- ✓ Forhandlerens udfordringer

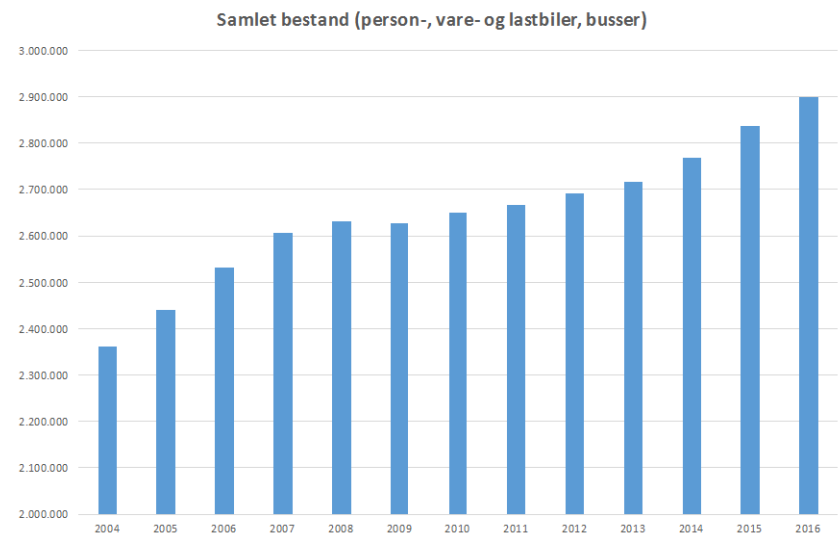
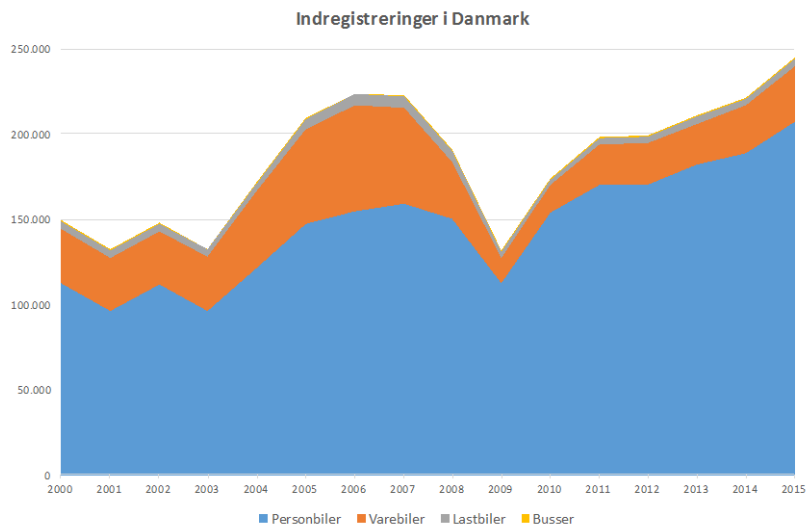
Makro trends



”Vi vil se større ændringer i branchen i de næste 5 – 10 år, end vi har oplevet de seneste 50 år”

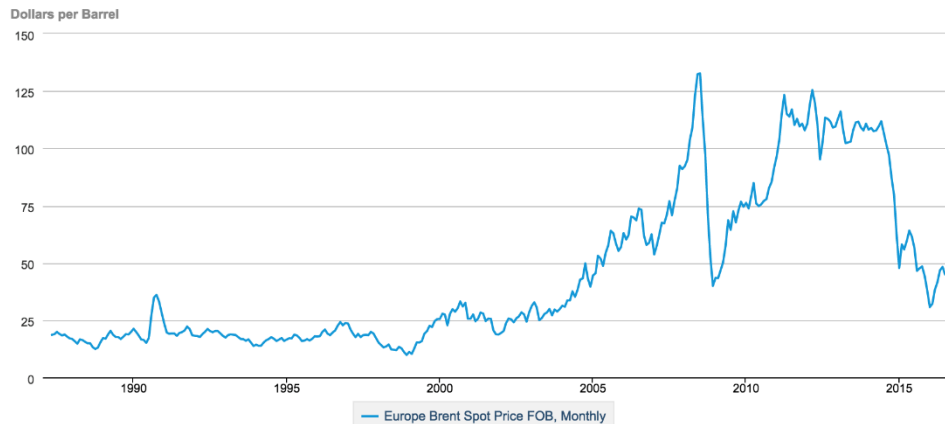
Mary Barra, GM CEO, på IAA 2015

Vækstbranche !



Elektrificering

Europe Brent Spot Price FOB, Monthly



THOMSON REUTERS Source: U.S. Energy Information Administration



Elektrificering

SEP 15, 2016 @ 09:11 AM 8,070 VIEWS

The Little Black Book

VW To Unleash 20 EVs By 2020 As Dieselgate Turns Into Tesla's Tarbaby



Bertel Schmitt, CONTRIBUTOR

I have written about the auto industry all my life. [FULL BIO](#) ✓

Opinions expressed by Forbes Contributors are their own.



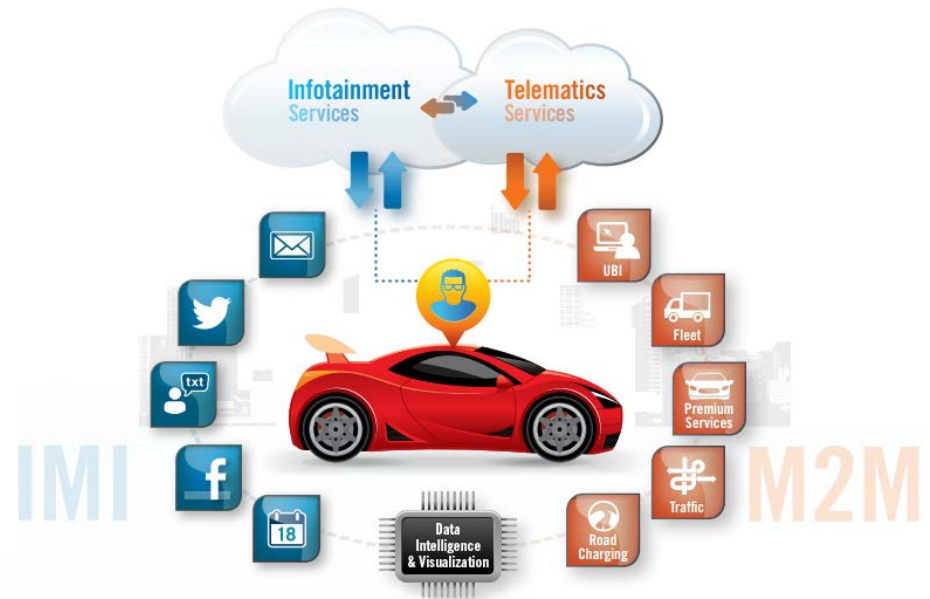
Elbil = Bil

Og det kommer (fortsat) til at gå langsommere end vi regner med...

Til gengæld vil det pludselig gå stærkt !



Teknologi (bil)



Helt nye forretningsmuligheder: f.eks. "Power on demand"

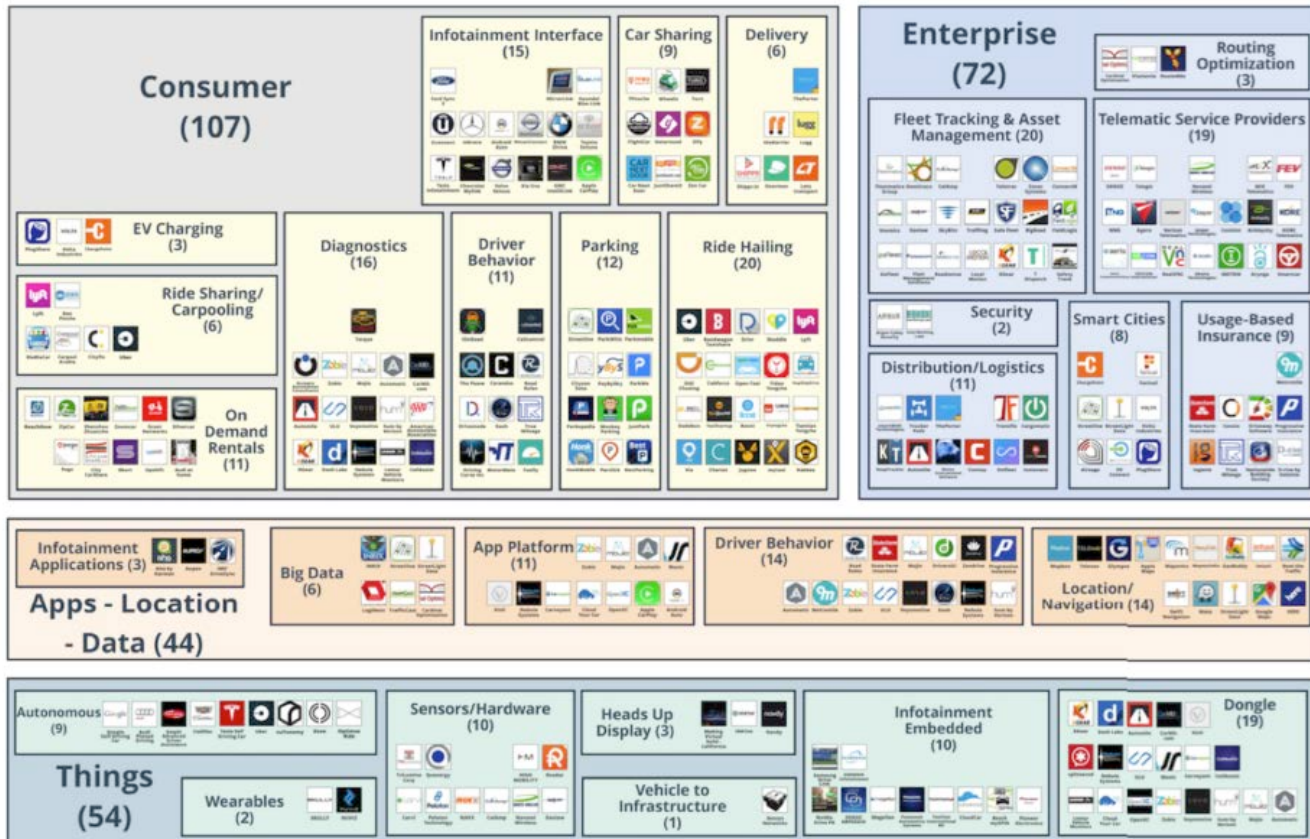
"Connected Car"



DESIGNED BY
Liz Slocum Jensen

Connected Cars Landscape

POWERED BY
spoke



April 2016

Måske den største "disruptor"?



- **Salget** af nye biler vil falde væsentligt
- Bilerne vil blive brugt mere end i dag
- Antallet af **skader** vil blive reduceret
- **Abonnementer** frem for ejerskab

Eksempel (New York):

- 9.000 selvkørende biler kan erstatte alle 55.000 taxier
- Ventetid falder til 36 sekunder
- Prisen falder til en tiendedel

Kilde: Eric Brown, IHS Automotive

Selvkørende biler

≡

BUSINESS INSIDER

TECH



Biz Carson

✉

🐦

📧

🕒 17h

🔥 4,792

Facebook

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Print

The driverless car revolution is coming, and Lyft's president now predicts it will "all-but end" car ownership in cities by 2025.

"We see car ownership as a burden that is costing the average American \$9,000 every year. The car has actually become more like a \$9,000 ball and chain that gets dragged through our daily life," Zimmer said in an opus on Medium that outlined his vision for an autonomous car future.

Zimmer believes that ride-hailing companies like his own and Uber are now "empowering" people to give up their cars. Already, there's been a noted decline in the percentage of people under 45 who don't have a license.

A photograph of John Zimmer, co-founder of Lyft, speaking into a microphone at a Lyft driver rally. He is wearing a blue patterned shirt and holding a pink object. The background is a chalkboard with various colorful drawings and text, including "AS....", "I met 20 yrs", "I run", "PRIVATE DANCER!", "PRUNK", "Hiding from the government", "Named 'Taco' for his dyed PINK!", "drive", "to make every", "Pre-teens that", "had".

Lyft Co-founder, John Zimmer attends the Lyft driver rally at Siren Studios on January 27, 2015 in Hollywood, California.

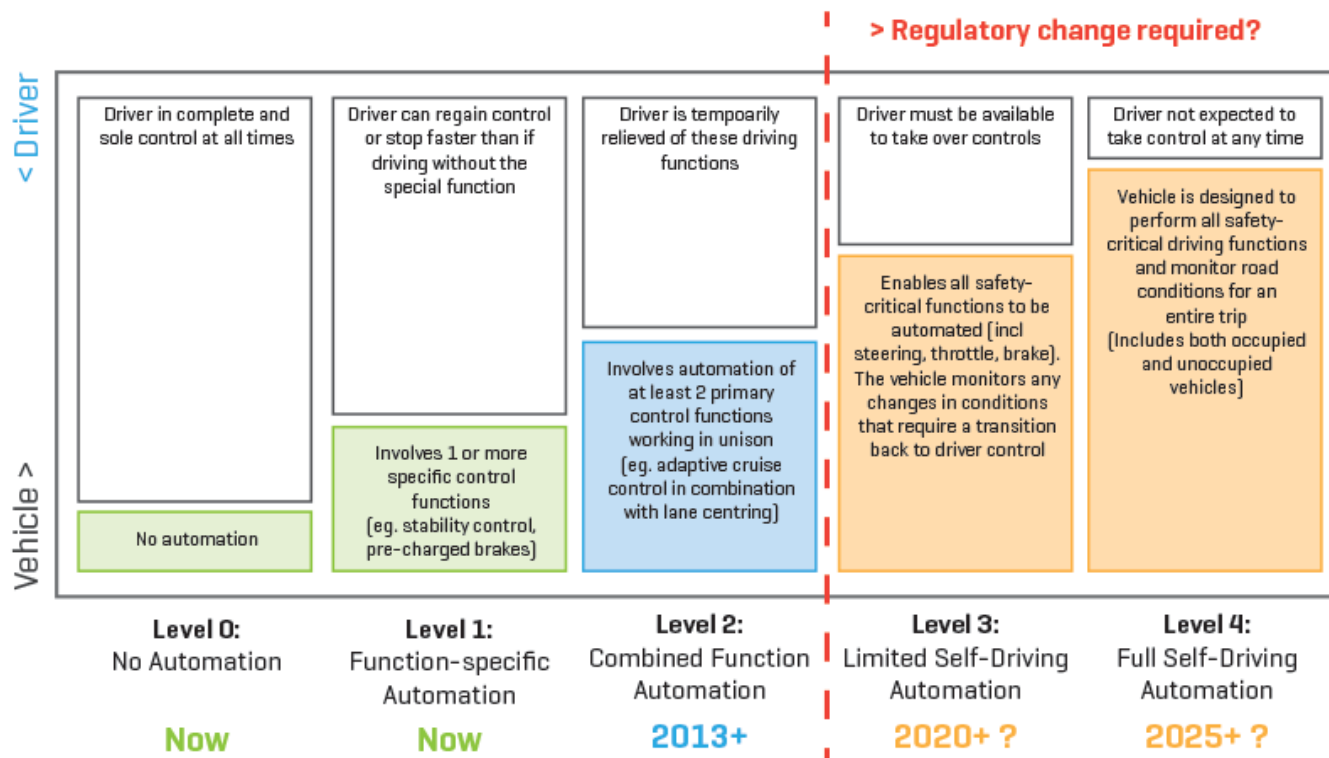
John Sciulli/Getty Images for Lyft

A rectangular traffic sign with a black border. The top section is white with the text "HOV LANE" in black. The middle section is black with a white diamond shape. The bottom section is white with the text "AHEAD" in black.

13

Selvkørende biler

Levels of driving automation (NHTSA)



Source: NHTSA (Modified)

Selvkørende biler



- Uber har introduceret selvkørende biler (level 4) i Pittsburgh
- "Access economy" og digitalisering smelter sammen

- Uber har købt OTTO
- Bliver lastbiler først på motorvejene med level 5?



01000010
01101001
01101100

Paver og smartphones...



amazon vehicles

See specs, read reviews, and ask owners



"Like a dream, but better"
by Rodney



The 2016 C-Class Sedan

[Learn more](#)



 **2017 Kia Sportage**
[Learn more](#)

 **2016 Mercedes-Benz C-Class Sedan**
[Learn more](#)

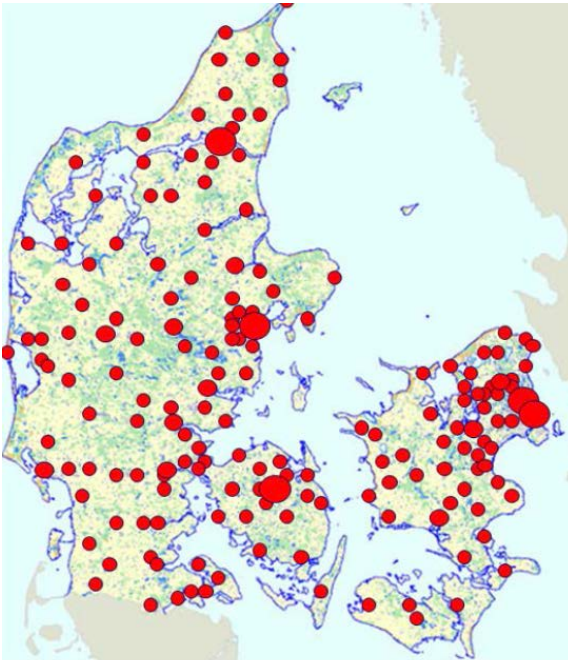
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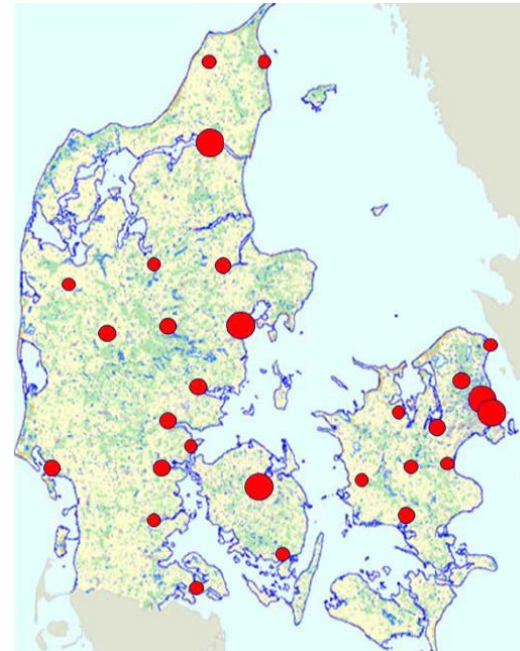


- Vil bilbranchen også blive "amazoned"?
- Fjerner "friktionspunkter"

Den digitale revolution (Danmark)...?



2012: Ca. 210 byer med mere end 3.000 indbyggere, der har en udvalgsware-forsyning på et vist niveau



2025: Den overordnede udvalgsware-forsyning, såfremt 15% af dagligvarehandlen og 50% af udvalgs-varehandlen sker via internettet

Kilde: Institut for Center-Planlægning, november 2012

"Follow the Money..."



Online Auto Sales Startup Carvana Is Raising \$300 Million To Expand Nationwide

Posted May 27, 2015 by Ryan Leber (ryandleber)



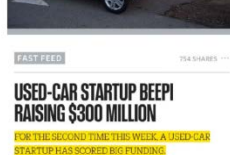
Used car sales are heating up online, with huge amounts of cash pouring into an industry that has yet to be disrupted by technology. A company called **Carvana** is in the process of raising a huge

Raising \$300M



USED-CAR STARTUP BEEPI RAISING \$300 MILLION

FOR THE SECOND TIME THIS WEEK, A USED-CAR STARTUP HAS SCORED BIG FUNDING



A used-car marketplace site just scored the holy grail of the startup world: announcing a massive fundraising round of at least \$300 million. Based on

Raising \$300M



Used Car Retailer, Shift, Raises \$50 Million In Round Led By Goldman Sachs

Posted Sep 1, 2015 by Jonathan Stieker (jstieker)



With \$50 million in new funding, the online used car marketplace **Shift** is hoping to drive off the stereotypes and outrace the stigma associated with buying used cars.

Raised \$73M



Roadster drives away with \$1.75 mln seed

ROADSTER IS A... BY JONATHAN STIEKER



When the consumer is ready to test, Roadster's online Concierge team handles everything on behalf of the consumer from offering the car, making sure through delivery of the car to their home or office. Roadster is available only for the California market, representing approximately 15% of U.S. auto sales.

Raised \$1.75M



USAA Leads \$24 Million Round For Connected Car Platform Automatic

Posted Jan 25, 2015 by Sarah Perez (sarah@techcrunch.com)



Automatic, the connected car platform whose sensor and app combination is sometimes referred to as a "Fitbit for your car," announced this morning \$24 million in Series A funding led by the

Raised \$32M



Mobile dealership Tred raises another \$1M to help used car owners make more money

BY TONYA BROWN on June 3, 2015 at 9:47 am



It took a few pivots, but Tred appears to have settled on new business model that its investors feel optimistic about. The Seattle startup has raised an additional \$1 million from existing investors to help used car owners make more money off their

Raised \$4M

Nye aktører?

TRENDING NOW
I drove one of only ten Aston Martin DB10s made for Spectre

1 NEW POST

LOG IN | SIGN UP

LONGFORM | REVIEWS | VIDEO | TECH | SCIENCE | ENTERTAINMENT | CARS | DESIGN | US & WORLD | FORUMS

PREVIOUS STORY
Of course we made a lot of GIFs from the new Star Wars: The Force Awakens...

NEXT STORY
Every new scene in the third Star Wars: The Force Awakens trailer, analyzed

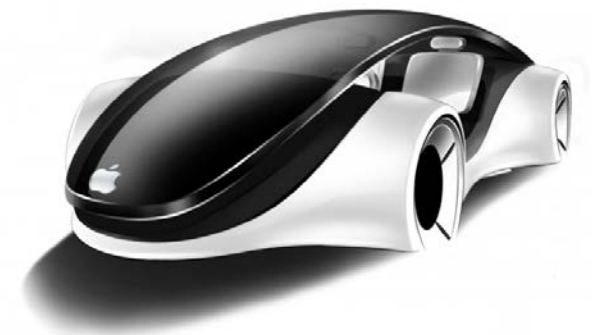
APPLE | TECH

Tim Cook says car industry is ready for 'massive change'

By **Sam Byford** on October 19, 2015 11:59 pm [Email](#) [@345triangle](#)

THE LATEST HEADLINES

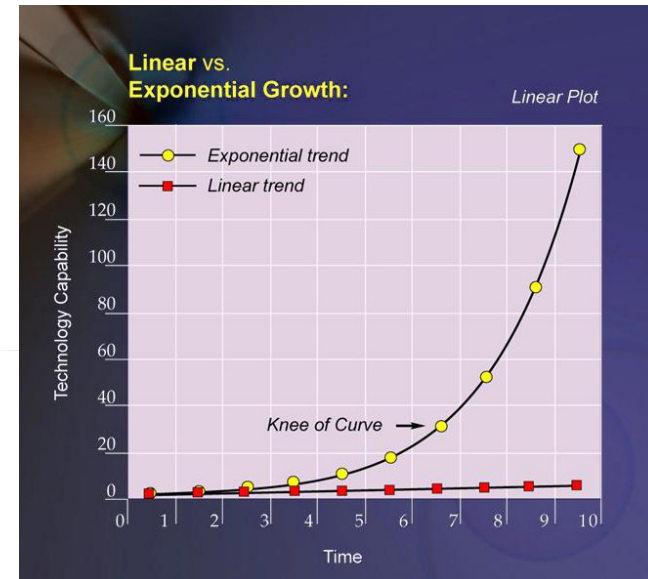
- BlackBerry Priv Android slider phone will be available on Verizon, too
- Nissan's car made of origami looks like something out of a video game
- Kangaroo farts won't save the world
- A brief history of the bend test



Siri
Cortana
Echo
Ok Google

....Desktop bilportaler vil forsvinde

Vi har i bilbranchen svært ved...



4 muligheder for bilbranchens aktører



Digitale muligheder og trusler

- Digitale værktøjer ikke integreret i vores **processer** – eller vores forretningsmodel
- Risiko for at blive valgt fra; uden at vide det!
- "Der kommer en kunde ind og vil købe en bil..."
- "Clicks and bricks..." (omnichannel)
- Nye biler: marginal falder mod nul. Producenter/importører går online
- Pas på **lineære** processer og tankegange
- "Billig" baggrund at glimre på...

The best place to hide a dead body
is page 2 of Google search results.



"Death of a car salesman"
The Economist 22.08.2015

Konklusioner

- Vi **køber stadig biler** i 2025, men indkøb koncentrerer og bilforhandlerens funktion ændres
- **Elbiler**: De skal nok komme, men der går stadig lang tid
- **"Connected cars"**: større betydning for branchens aktører end de lige nu er opmærksomme på
- **Selvkørende biler**: kommer hurtigere end vi tror
- Alle dele af bilbranchens **værdikæde** som med fordel kan digitaliseres, VIL blive digitaliseret
- **Nye forretningsmodeller** primært drevet af eksterne aktører (ikke branchen selv)



Det bliver utroligt spændende; masser af muligheder!

Bilbranchen i Europa 2025



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Nyeste indlæg fra bloggen



Cars Online 2014

Nyheder fra branchen

- ✓ Er der en brændende platform i bilbranchen?
- ✓ Forhandlere og importører
- ✓ Bilekonomdagen 2015: Digitale relationer i bilbranchen
- ✓ C-Segmentet skrumper
- ✓ Kaffe og biler...?

Se flere nyheder fra branchen »

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