

The image features the Accenture logo, which consists of a stylized chevron symbol above the word "accenture" in a lowercase, sans-serif font. The logo is overlaid on a photograph of a rocky coastline with waves crashing against the shore. A person is standing on a rock in the distance, and the lower-left corner of the image is partially obscured by a dark, vertical shape, possibly a person's leg or a shadow.

accenture

*High performance. Delivered.*

Logistikens påverkan på lönsamheten och värderingen

Johan Karlberg  
30 November 2004

# accenture

# Accenture

# accenture

*High performance. Delivered.*

- Consulting
- Technology
- Outsourcing



## - Accenture -

## - Benefit to clients -

- |  |  |
|--|--|
| ▪ FY04 revenues of \$13.67 billion, with an average annual growth rate of 17% over the past 10 years | ▪ A healthy, <b>dynamic</b> firm with growth that has paralleled our clients' success                                |
| ▪ Over 103,000 professionals in 48 countries and 110 offices   | ▪ Seamless, global <b>integrated capabilities</b>  |
| ▪ Significant annual investment in R&D (\$250 million) and internal training (\$401 million)         | ▪ <b>Leading edge</b> client solutions and best human capital  |
| ▪ Globally linked by Accenture knowledge management system, Knowledge Xchange®                       | ▪ A truly <b>global team</b> equipped with highly developed tools and best practices                                 |
| ▪ Working with 84 of the Fortune Global 100 (magazine's) largest public companies                    | ▪ Delivery of <b>maximum impact</b> and value by selective matching of our consulting capabilities with client needs |
| ▪ At least 73 of Accenture's top 100 clients have been clients for >10 years                         | ▪ Commitment to realise <b>long-term business value</b>  |

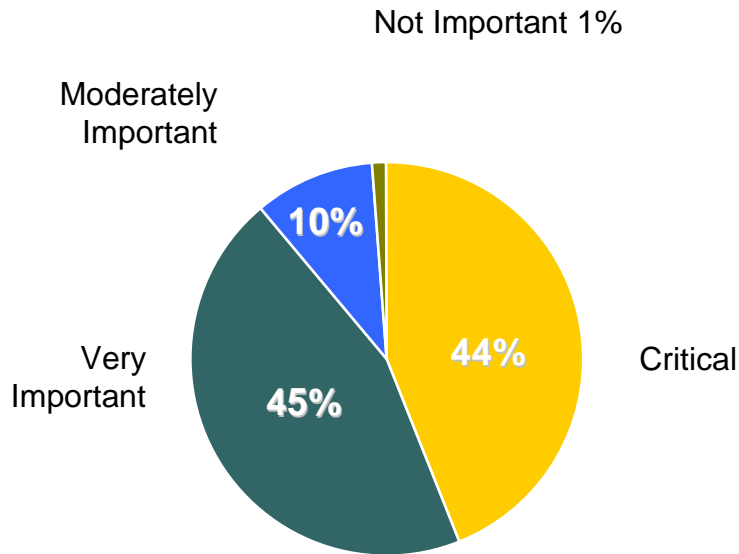
Supply Chain, företagsvärdering och framgångsfaktorer

High Performance inom bilindustrins underleverantörsled

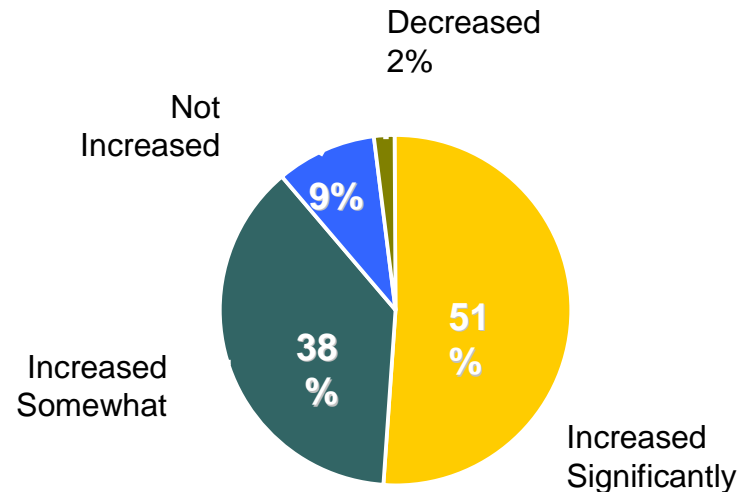
Studie – Hösten 2003  
600 företag analyserad  
>100 företagsledare - enkät

>60 företag intervjuade  
24 industrier

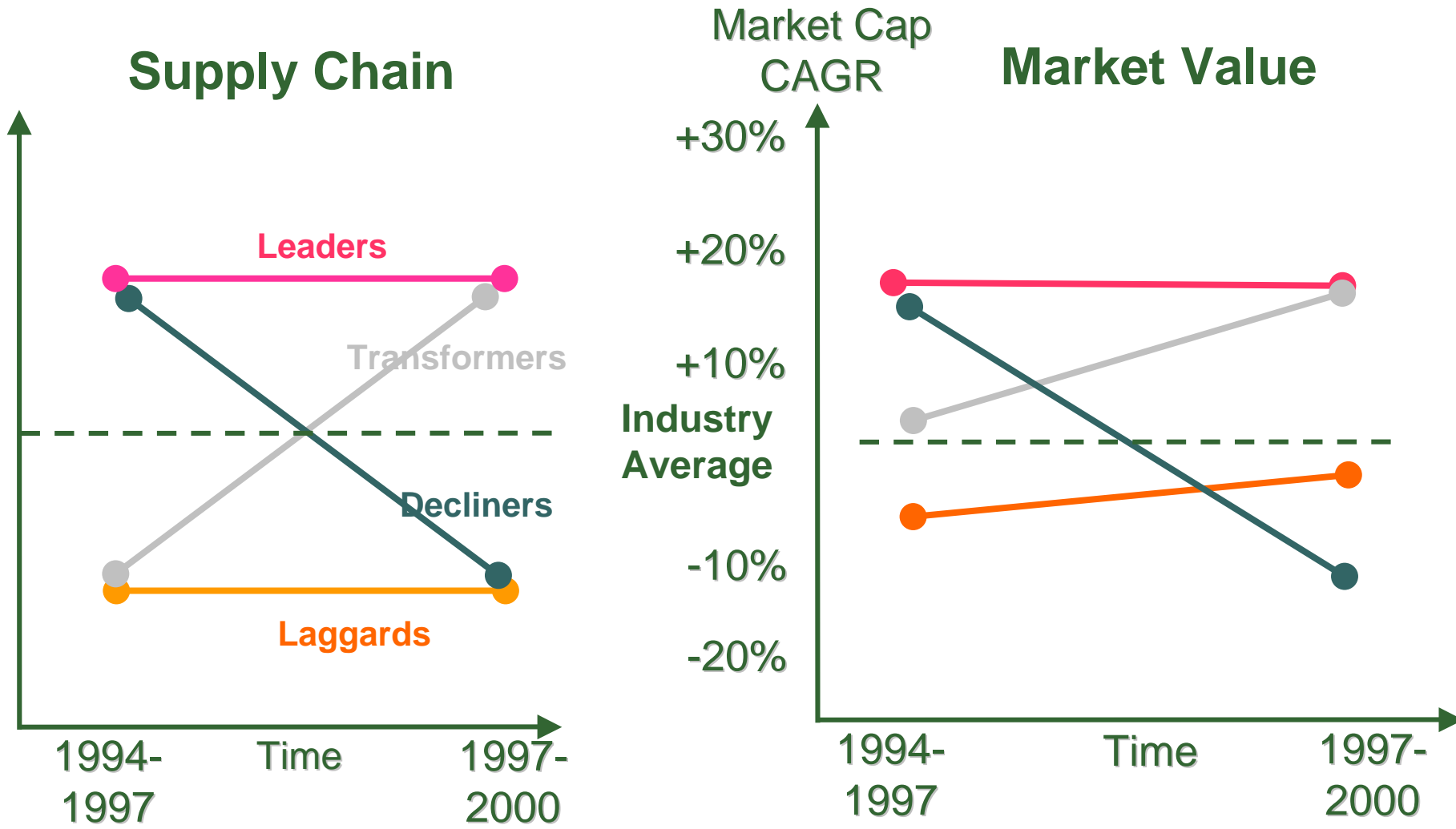
”How important is supply chain management to your corporation?”



”Over the last previous three years, your investments in supply chain capabilities have ...”



# Tydlig koppling mellan resultat i supply chain och värdeutveckling

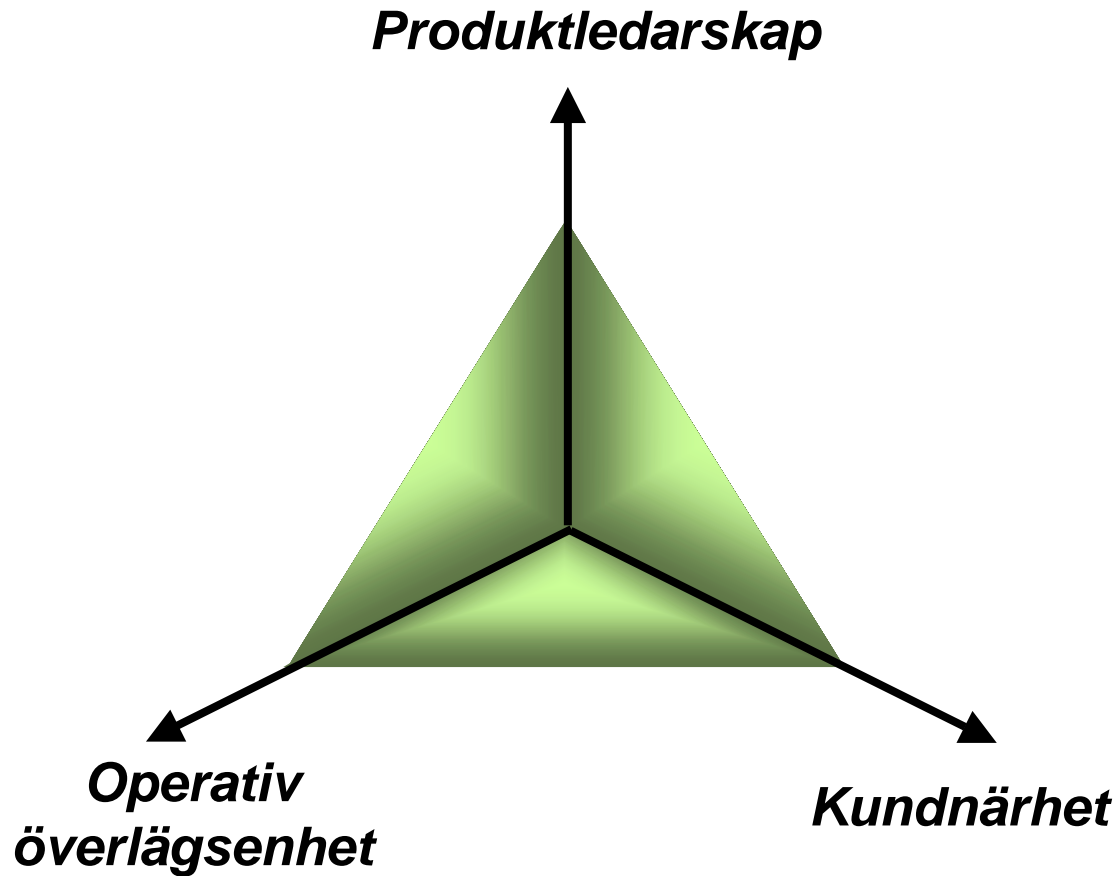


## Sex gemensamma råd från de bästa företagen



1. Integrera de strategiska supply chain frågorna i affärsstrategin
2. Utveckla en integrerad och fullständig operativ modell
3. Fatta de strategiska försörjningsbesluten (in-/outsource)
4. Utveckla effektiva samarbetsformer med affärspartners
5. Våga integrera ny teknologi och nya tillvägagångssätt
6. Exekvera mot uppsatta nyckeltal och mål

Operativt Strategiskt



**“Bästa totalkostnad”**

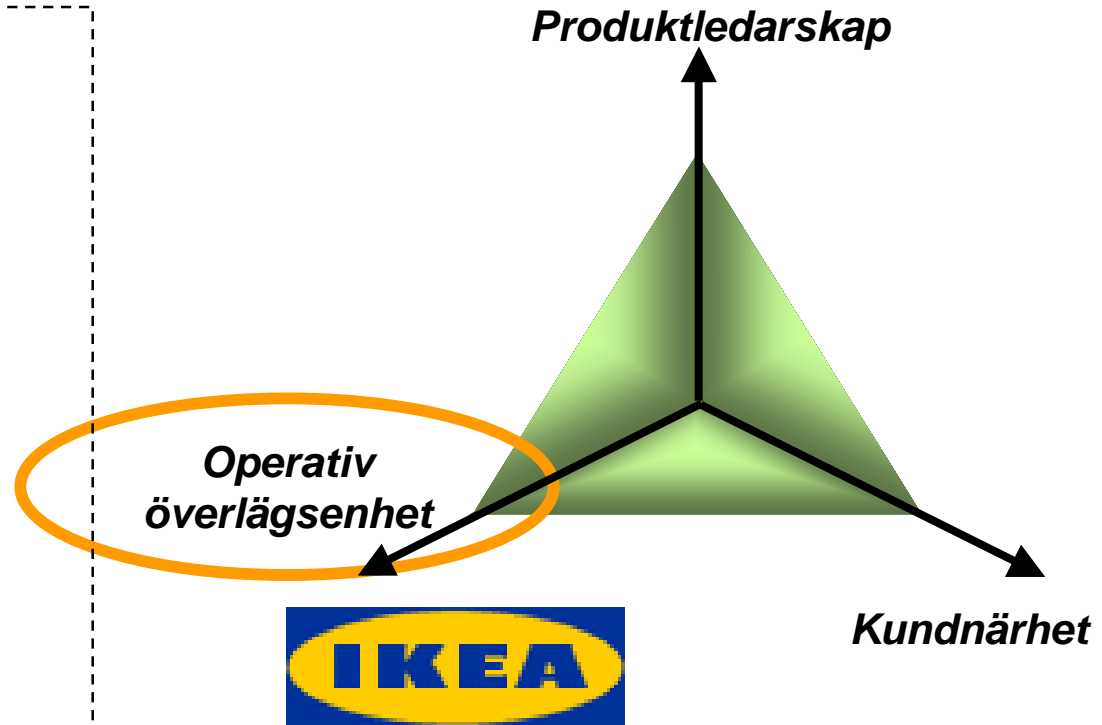
**Kultur**

- ”Följ regelboken”
- Standardisering
- Enkelt och tydligt



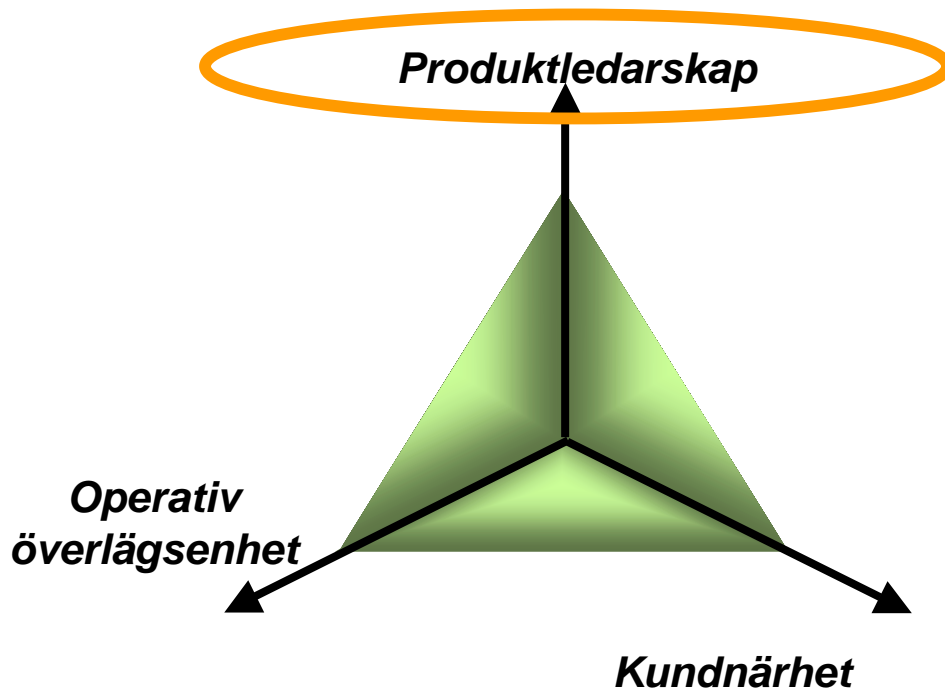
**Supply Chain**

- Standardiserad produkt och process
- ”Design-for-supply-chain”
- Effektiv orderhantering
- ”Make-to-stock/forecast”
- Effektiv in-/utleverans
- Fasta tider och lösningar





# SONY



## *“Bästa produkten”*

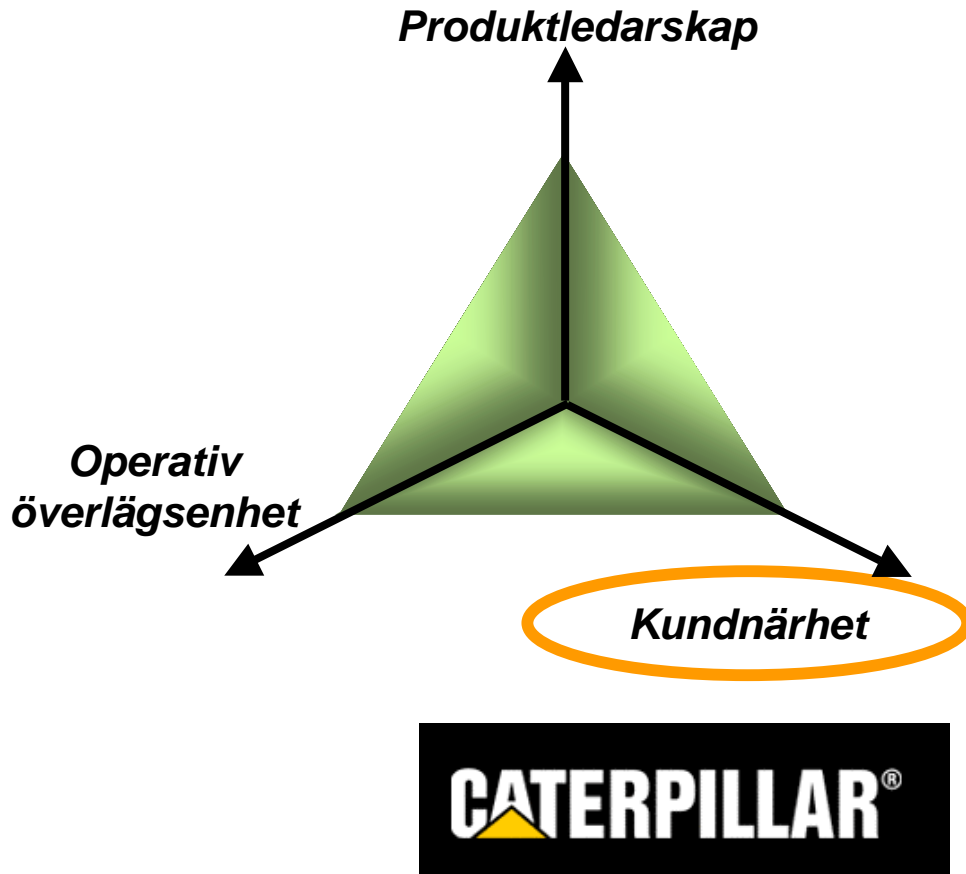
### **Kultur**

- Innovation – unik
- Först



### **Supply Chain**

- Fokus på produkttegenskaper (kundupplevd kvalitet)
- Flexibel, föränderlig supply chain
- Plattforms-/processfokus
- Frekventa teknologi-/generationsskiften



***“Bästa kund Anpassningen”***

**Kultur**

- Partnerskap
- ”Vi klarar allt för kunden!”



**Supply Chain**

- Kundkonfigurerad produkt
- ”Design-to-order” / ”Make-to-order”
- Flexibel orderhantering
- Flexibel leveransprocess
- Verkstäler (minst) kundönskemålen



Supply Chain, företagsvärdering och framgångsfaktorer

High Performance bland fordonskomponentleverantörer

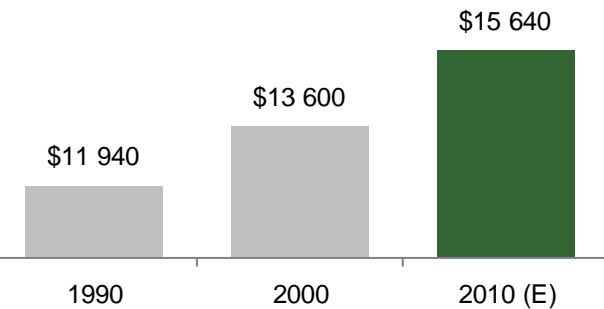


# Fordonskomponentmarknaden har vuxit, beroende på ökad OEM outsourcing, samtidigt som leverantörerna har upplevt ökad prispress.

## Automotive Supplier Environment

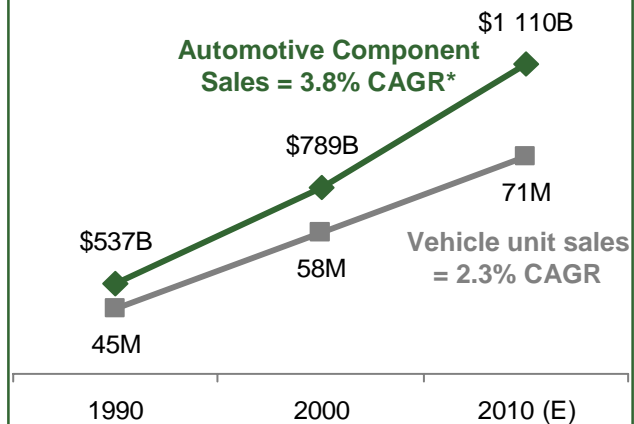
*As OEMs outsource more of the vehicle value ...*

**Component Value Per Vehicle**



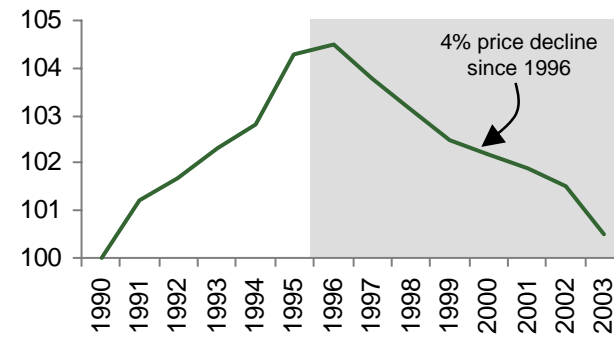
*... supplier market growth has outpaced OEM sales growth ...*

**Growth Rates of Components Market vs. Vehicle Sales**



*... despite downward price pressures on suppliers*

**Auto Parts Prices Changes (US) (1990 = 100)**

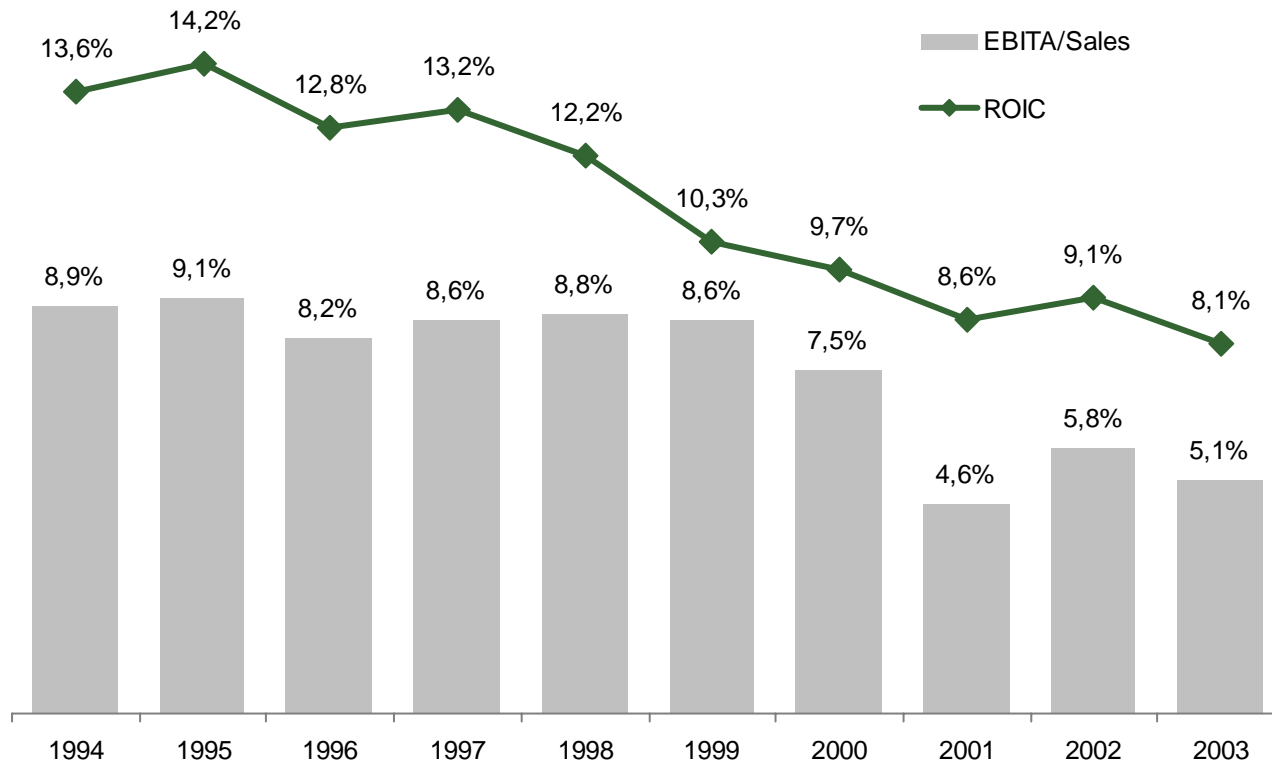


Source: University of Michigan – Center for Automotive Research, Bureau of Labor Statistics, OESA, Fraunhofer Gesellschaft, Accenture analysis



# En konsekvens är att leverantörernas lönsamhet har försämrats.

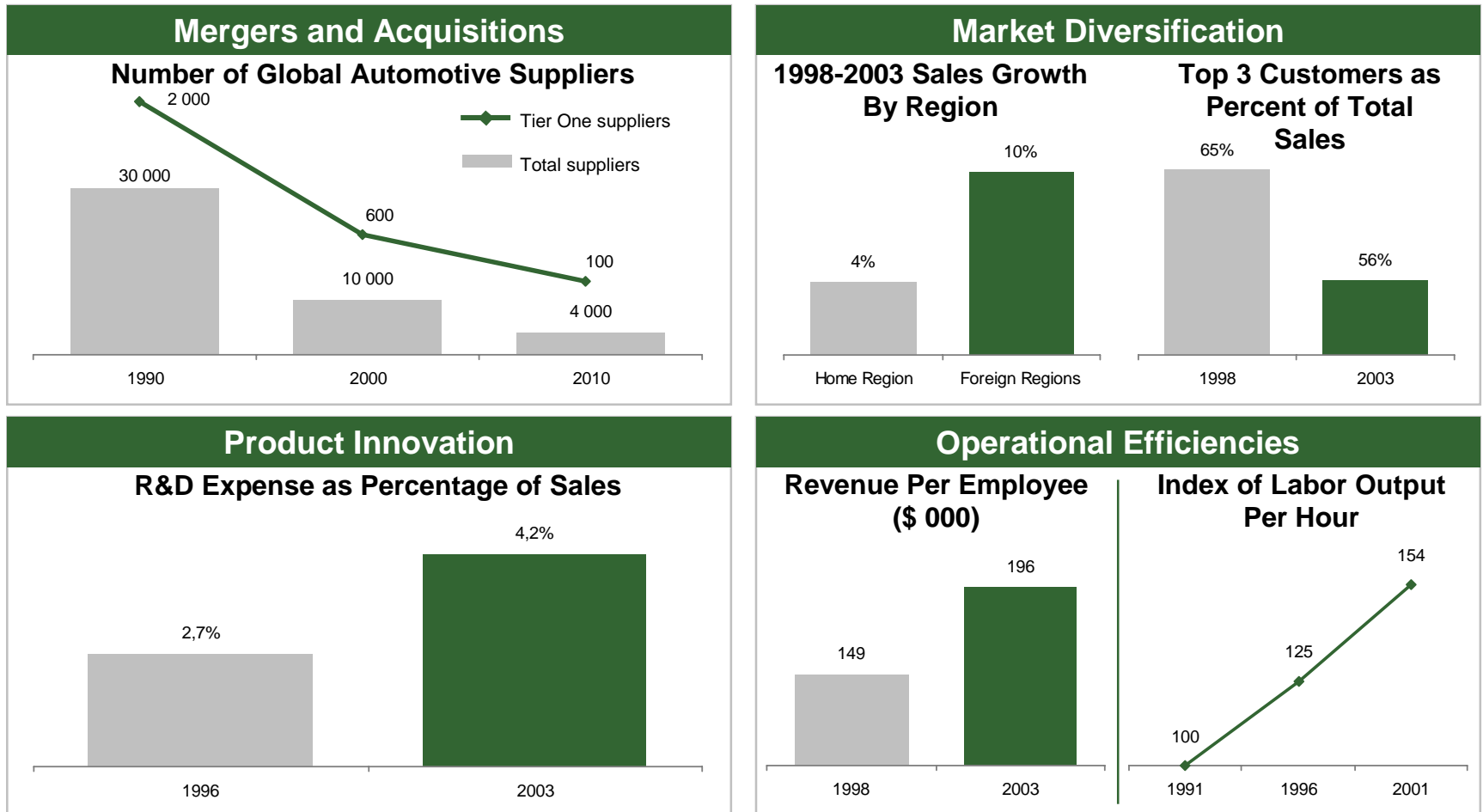
## Profitability of Top Global Suppliers





# Leverantörerna agerat på utmaningarna genom konsolidering, kunddiversifiering, nya produkter och operationell effektivitet.

## Auto Supplier Trends





# High Performers analyserades avseende “Total Return to Shareholders” (TRS).

## Initial List of Top 50 Global Suppliers

1. Delphi	\$26.2	26. American Axle	\$ 3.7
2. Bosch	\$23.2	27. Takata Corp	\$ 3.5
3. Denso	\$16.9	28. Bridgestone	\$ 3.4
4. Visteon	\$16.5	29. Freudenberg	\$ 3.4
5. Lear	\$15.7	30. Benteler	\$ 3.4
6. Magna	\$15.3	31. Goodyear	\$ 3.3
7. JCI	\$15.2	32. Hitachi	\$ 3.3
8. Aisin Seiki	\$13.5	33. Panasonic	\$ 3.2
9. Faurecia	\$12.7	34. Toyota Gosei	\$ 3.2
10. TRW	\$11.3	35. Mahle	\$ 3.1
11. Siemens VDO	\$ 9.5	36. Motorola	\$ 2.9
12. Valeo	\$ 8.9	37. Federal-Mogul	\$ 2.9
13. ZF Friedrichshafen	\$ 8.2	38. Magneti Marelli	\$ 2.9
14. Dana	\$ 7.9	39. Tenneco Auto	\$ 2.8
15. Continental AG	\$ 7.6	40. Tower	\$ 2.8
16. ThyssenKrupp	\$ 7.3	41. Alcoa	\$ 2.8
17. Yazaki	\$ 5.8	42. NSK	\$ 2.8
18. DuPont	\$ 5.5	43. BorgWarner	\$ 2.7
19. CalsonicKansei	\$ 5.4	44. Mitsubishi Electric	\$ 2.7
20. Autoliv	\$ 5.3	45. Cummins	\$ 2.6
21. Michelin Group	\$ 4.7	46. BASF	\$ 2.4
22. Koyo Seiko	\$ 4.1	47. Dura	\$ 2.4
23. Collins & Aikman	\$ 4.0	48. Behr	\$ 2.4
24. ArvinMeritor	\$ 3.9	49. Hella KG Hueck	\$ 2.3
25. GKN	\$ 3.9	50. Honeywell	\$ 2.3

(billions)

## Screened List of Top Global Suppliers

1. Delphi	\$26.2	26. American Axle	\$ 3.7
2. Bosch	\$23.2	27. Takata Corp	\$ 3.5
3. Denso	\$16.9	28. Bridgestone	\$ 3.4
4. Visteon	\$16.5	29. Freudenberg	\$ 3.4
5. Lear	\$15.7	30. Benteler	\$ 3.4
6. Magna	\$15.3	31. Goodyear	\$ 3.3
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24. ArvinMeritor	\$ 3.9	49. Hella KG Hueck	\$ 2.3
25. GKN	\$ 3.9	50. Honeywell	\$ 2.3

(billions)

## Final List of Evaluated Suppliers

1. Delphi	\$26.2
2. Denso	\$16.9
3. Visteon	\$16.5
4. Lear	\$15.7
5. Magna	\$15.3
6. JCI	\$15.2
7. Aisin Seiki	\$13.5
8. Faurecia	\$12.7
9. Siemens VDO	\$ 9.5
10. Valeo	\$ 8.9
11. Dana	\$ 7.9
12. Continental AG	\$ 7.6
13. CalsonicKansei	\$ 5.4
14. Autoliv	\$ 5.3
15. Michelin Group	\$ 4.7
16. Pirelli*	\$ 4.5
17. Koyo Seiko	\$ 4.1
18. Collins & Aikman	\$ 4.0
19. ArvinMeritor	\$ 3.9
20. GKN	\$ 3.9
21. American Axle	\$ 3.7
22. Bridgestone	\$ 3.4
23. Goodyear	\$ 3.3
24. Federal-Mogul	\$ 2.9
25. Tenneco Auto	\$ 2.8
26. Tower	\$ 2.8
27. BorgWarner	\$ 2.7
28. Dura	\$ 2.4
29. Pinfarina*	\$ 0.8
30. Brembo*	\$ 0.6
31. Gentex*	\$ 0.4

(billions)

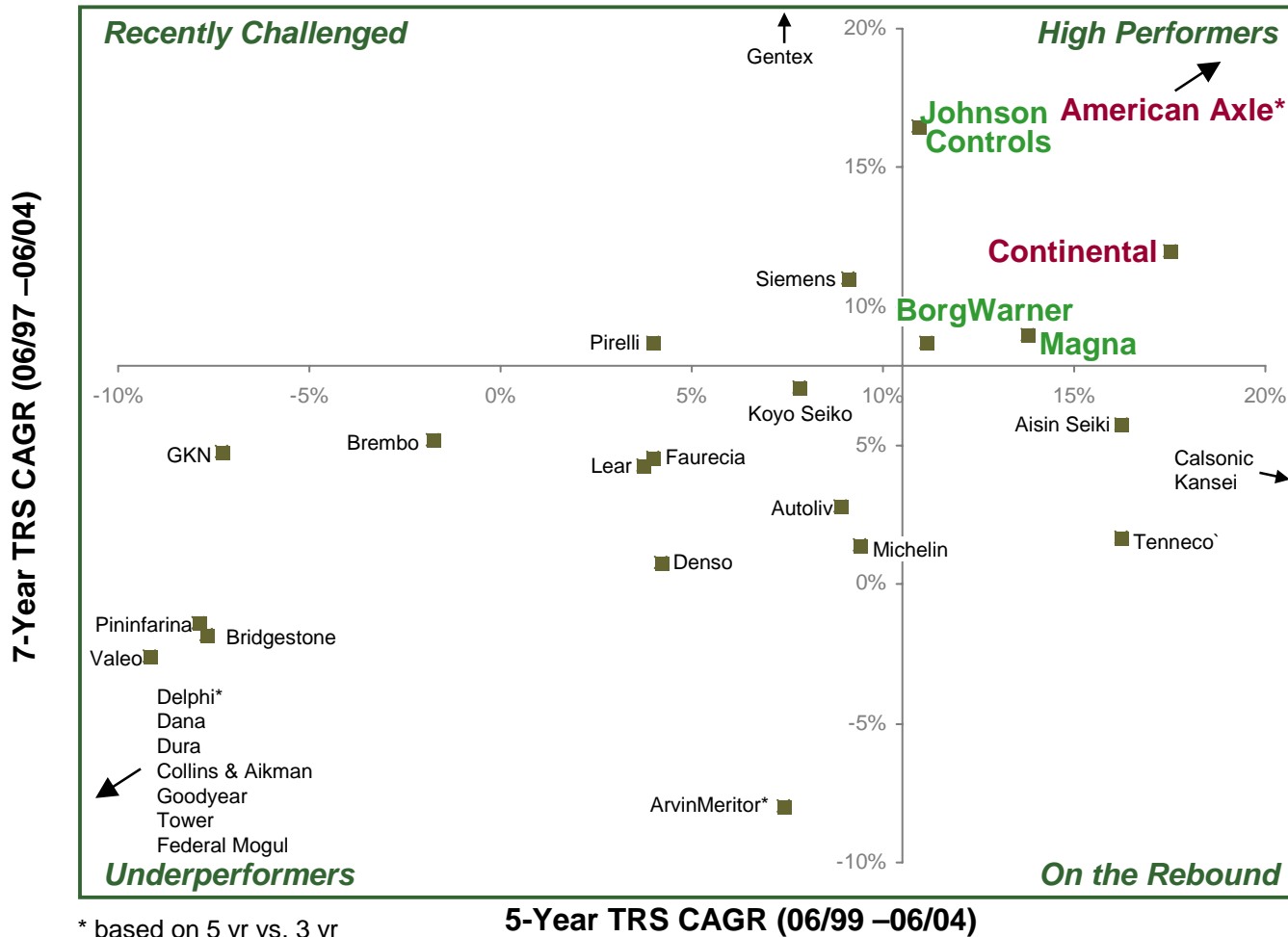
### Screening criteria

- Significant automotive/Tier 1 focus
- Public company for 5 years
- Shares actively traded on a public exchange
- Not an OEM “captive” supplier

Note: Ranked by estimated 2003 global OEM automotive parts sales



# En liten grupp leverantörer har varit enastående i att kunna skapa aktieägarvärde.

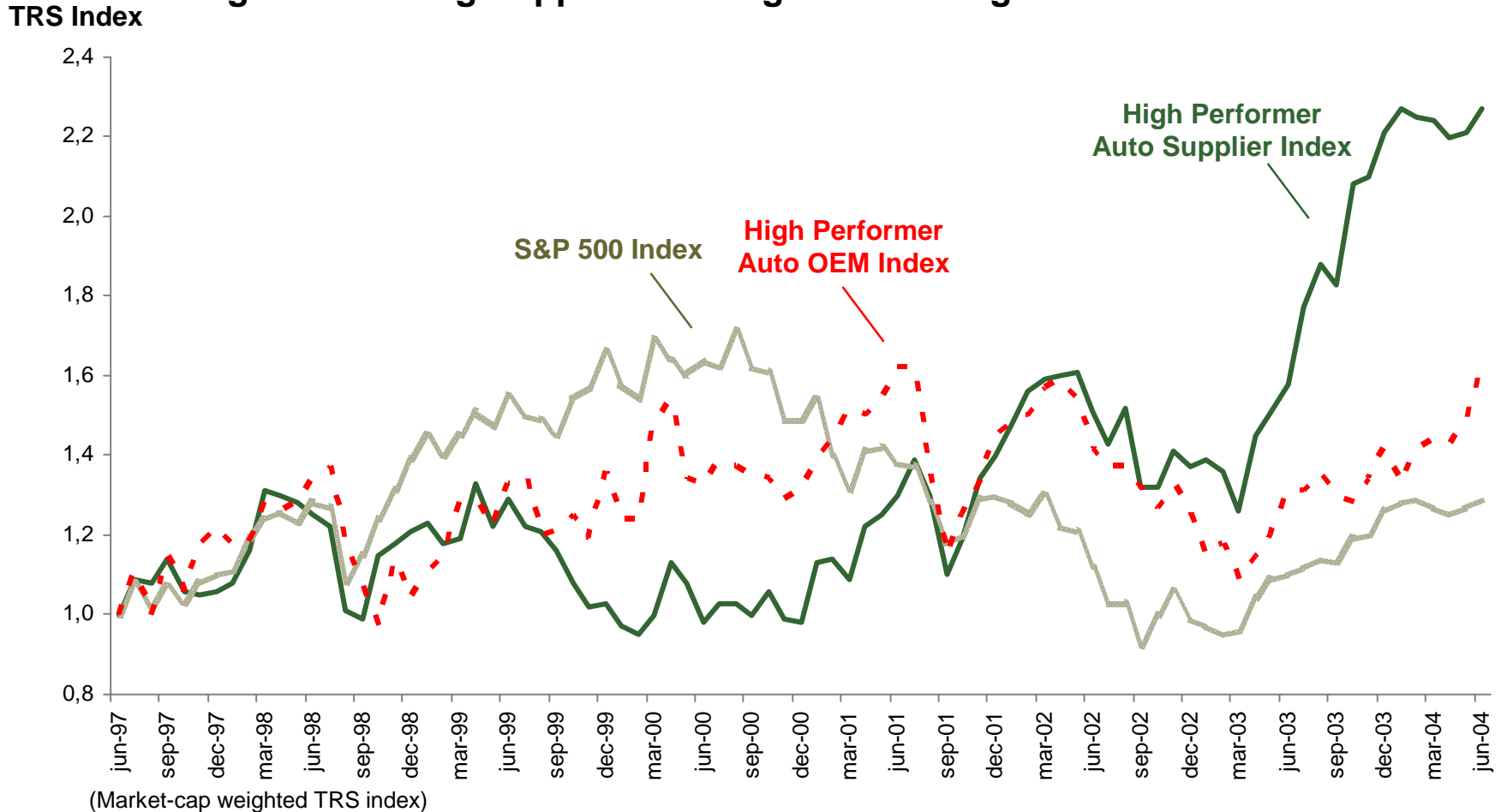






# Dessutom slår dessa High Performance leverantörer motsvarande High Performance fordonstillverkare och S&P 500-index.

## High Performing Suppliers vs. High Performing OEMs and S&P 500





# High Performers bygger lönsam tillväxt genom att omsätta positionen som marknadsledare till marknadsskapare, med bibehållen operationell excellens

## Common Themes Underpinning High Performance

### Profitable Growth

#### Market Leader

##### Achieve market leadership

- Attain leading market shares
- Sustain high levels of organic growth
- Pursue selective acquisitions for market positioning

#### Market Maker

##### Expand market boundaries

- Grow content per vehicle
- Increase capital expenditures
- Innovate to broaden product boundaries
- Expand to new markets

#### Operational Excellence

##### Maintain efficient operations

- Cost control
- Post-merger integration
- Asset productivity
- Debt management

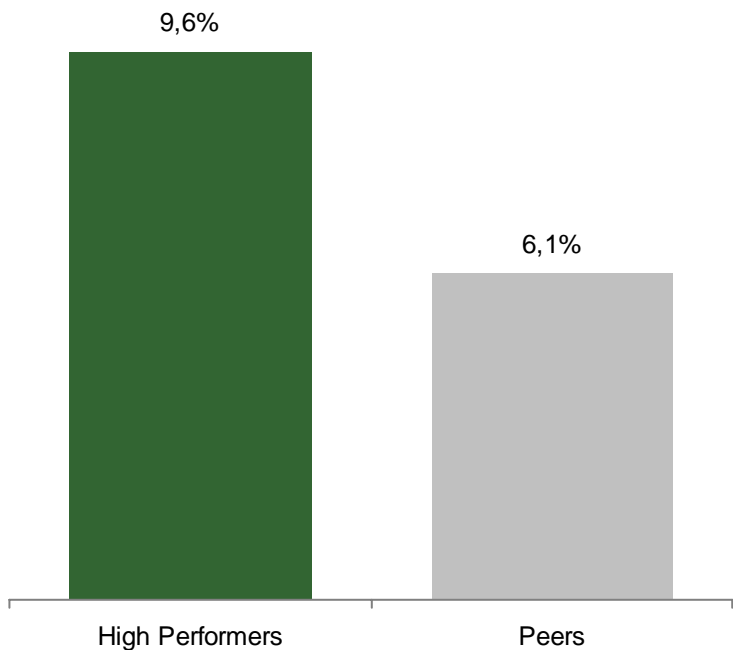


# High Performers åstadkommer högre produktivitet med sina fasta tillgångar. . .

## Asset Productivity

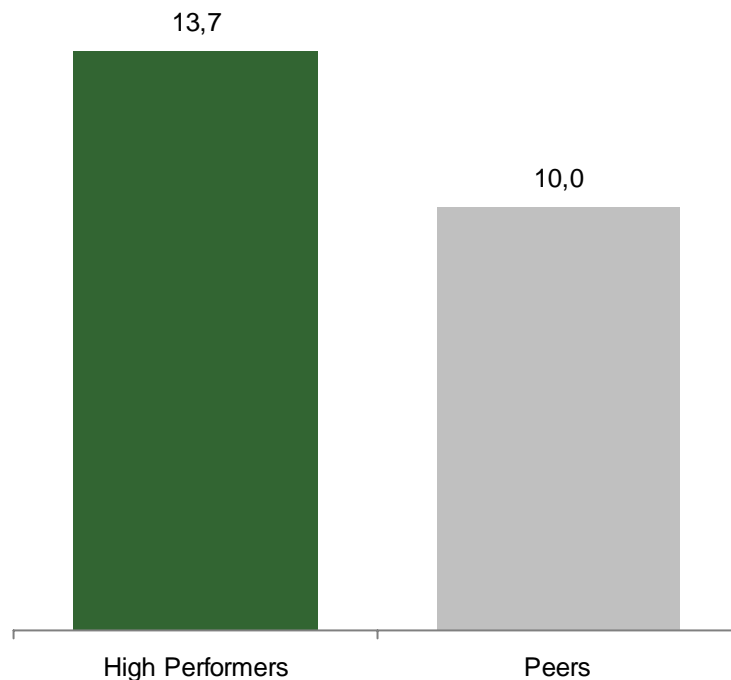
*High Performers' manage higher levels of productivity from their assets . . .*

**Average Return on Assets\*, 1999 – 2003**



*. . . including faster inventory turnover*

**Average Inventory Turnover, 1999-2003**



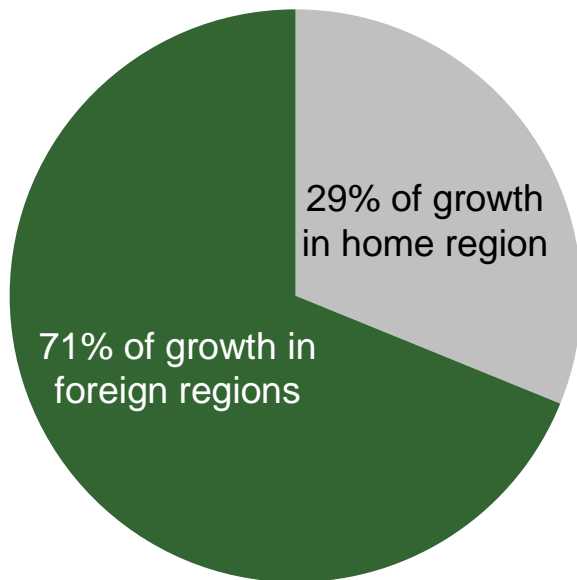
\* ROA defined as earnings before interest and taxes/total assets



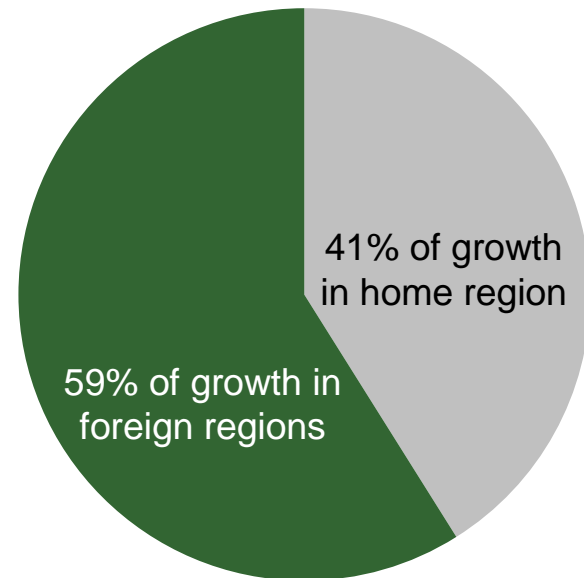
... och verkar flytta mer tillgångar och investeringar till nya regioner - både för att följa försäljningsökningar och söka lägre tillverkningskostnader.

### Location of Growth in Fixed Assets, 1998 – 2003

High Performers



Peers





# Sammantaget innebär detta, att leverantörer måste söka supply chain excellens för att möta ökade krav på operationell effektivitet

## Supply Chain Mastery



### Incorporate Supply Chain Into Business Strategy

- Speed-to-market
- Value added services
- Rapid product introduction

### Develop End-To-End, Integrated Operating Model

- Direct model
- Dynamic product offerings
- Lowest cost/highest quality

### Make Strategic In-source and Out-source Decisions

- “Smart” outsourcing
- Shared operations
- Vertical integration

### Develop Effective Linkages With Trading Partners

- Shortened supply chain
- Heightened supply chain visibility
- Collaborative product quality and cost improvements

### Adopt Leading-Edge Practices and Technologies

- Manufacturing and design collaboration
- RFID
- Collaborative forecasting

### Execute Effectively Against Defined Goals and Metrics

- Market-driven processes
- Collaborative culture
- Cross-functional metrics and scorecards

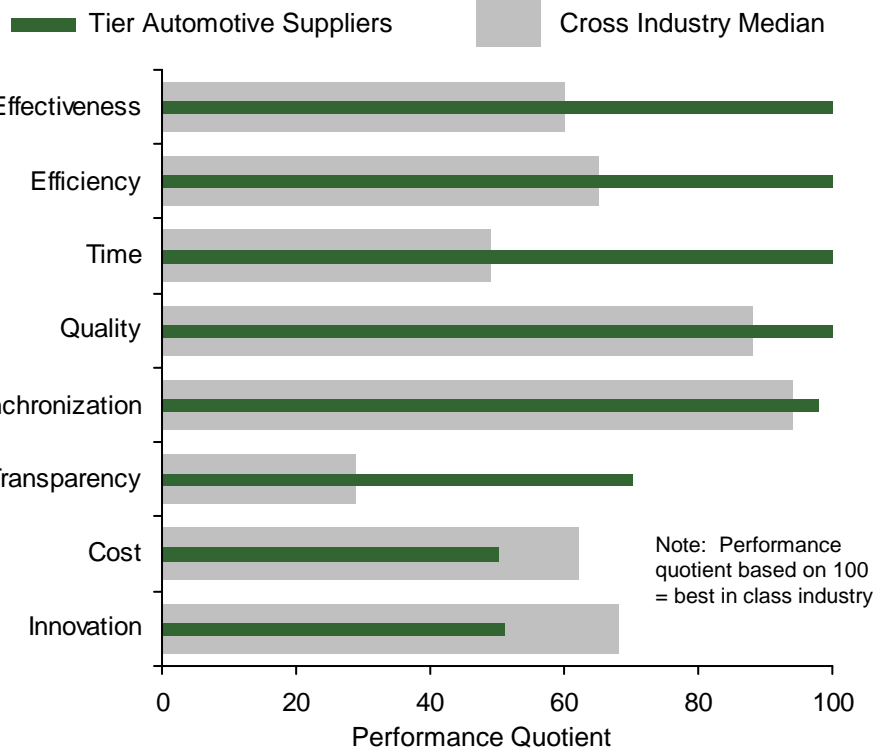


# Som industri presterar fordonskomponentleverantörerna bra inom supply chain. Dock finns stora skillnader finns mellan “bäst” och “medel”.

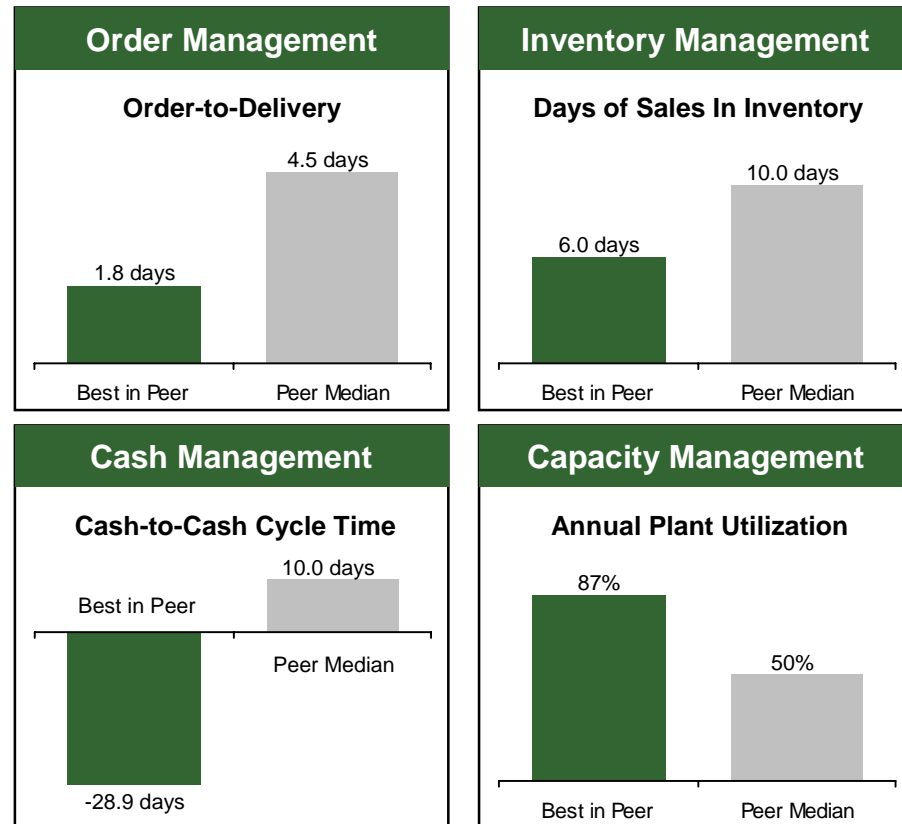
## Automotive Suppliers' Supply Chain Performance

*As a whole, automotive suppliers lead other industries in many supply chain performance indicators . . .*

### Supply Chain Performance Indicators



*. . . but distinctions within the industry's best and average performers suggest significant room for improvement*





# Fordonskomponentleverantörerna kommer att fortsätta utveckla verktyg och processer i sin strävan efter operationell excellens.

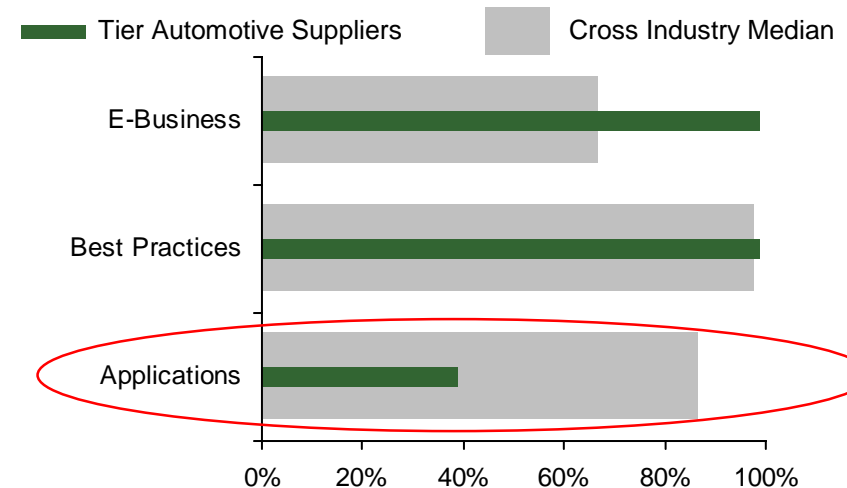
## Intensified Pursuit of Operational Excellence

*Suppliers will undertake cost and efficiency improvement initiatives . . .*

- Continued off-shoring of manufacturing and design functions
- Increased outsourcing of non-core business functions
- Improved program management capabilities
- Smarter sales management

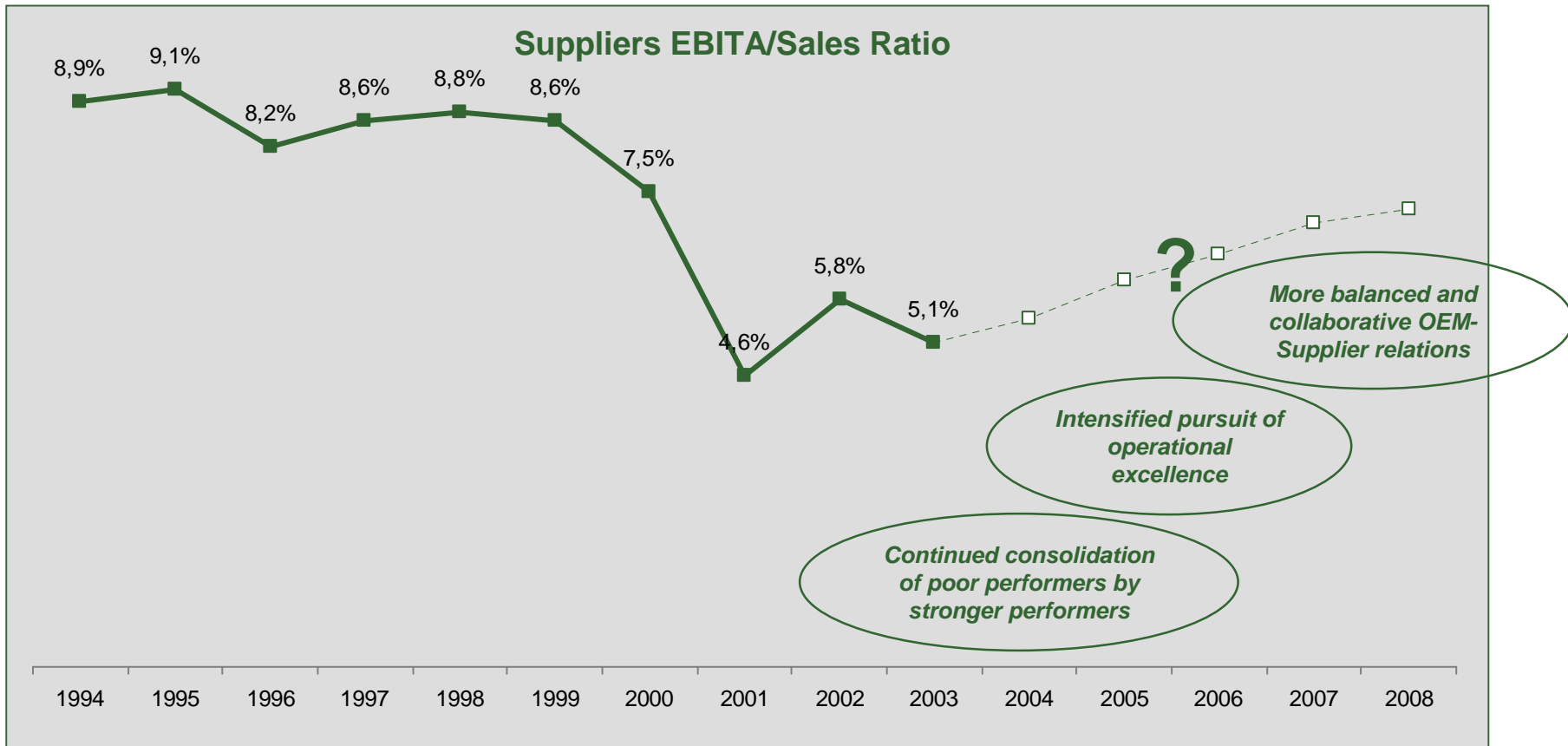
*. . . including technology enablement to drive more streamlined operations*

### Supply Chain Enabler Usage (% of Tier Auto Suppliers Using Packaged Applications)



# Sannolikt kan förverkligandet av dessa trender att leda till förbättrad lönsamhet i fordonskomponentindustrin.

## Stabilizing Industry Profitability







## Frågor och funderingar ...

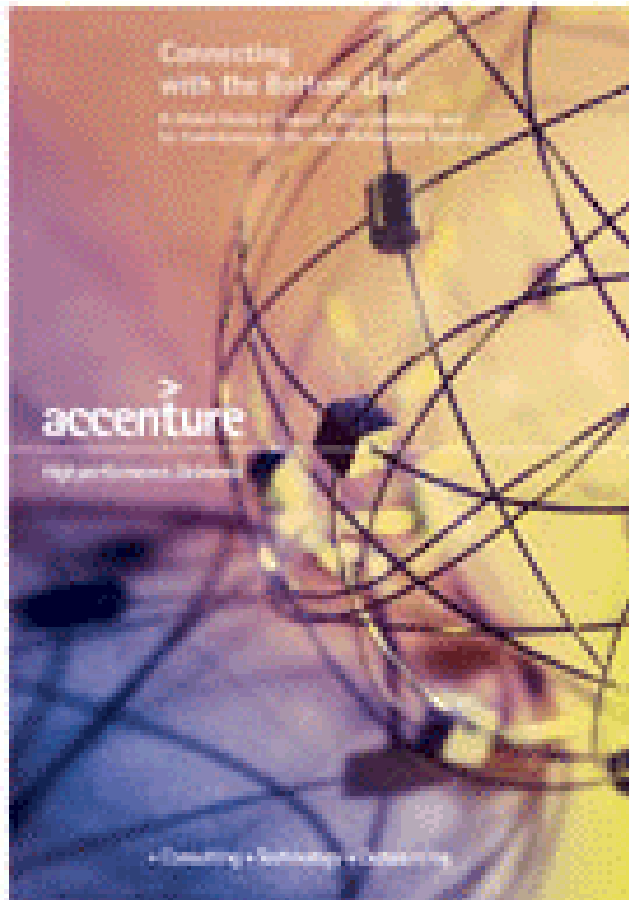


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## “Connecting with the Bottom Line —A Global Study of Supply Chain Leadership and Its Contribution to the High-Performance Business”



### Summary

Accenture, INSEAD and Stanford University conducted a multifaceted research project to understand how companies derive competitive advantage from their supply chains. The research demonstrates a correlation between the quality of a company’s supply chain and its financial performance, confirming that transforming supply chain operations can substantially impact a company’s ability to achieve high performance.

## “Creating and Sustaining the High-Performance Business: Research and Insights in the Role of Supply Chain Mastery”

### Summary

Few companies question the value of supply chain mastery. But until recently, empirical data connecting financial and supply chain performance did not exist. Accenture authors David Anderson, Bill Copacino and Ed Starr, along with Stanford University professor Hau Lee, report the results of a [groundbreaking study](#) that proves supply chain excellence is rewarded. The authors then examine the supply chain insights and behaviors of nearly 20 major companies—all of which have demonstrated ongoing financial success and consistent leadership in supply chain management.





2004 Accenture High Performance Study of Automotive Supplier Industry.

