



How SAP's Industry Strategy Helps Customers Drive Cost-effective Transformation and Sustainable Growth

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April 29, 2021

PUBLIC

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Consuming Industries **Market Perception**



Mining & Metals



Engineering & Construction



Automotive



Ind. Machinery & Components



Forest Products



Consumers



CPG, Retail, Newspaper



Building Materials



Consumers



Engineering & Construction



Wholesale



Chemicals



Consumer Goods



Ind. Machinery & Components



Aerospace



Automotive

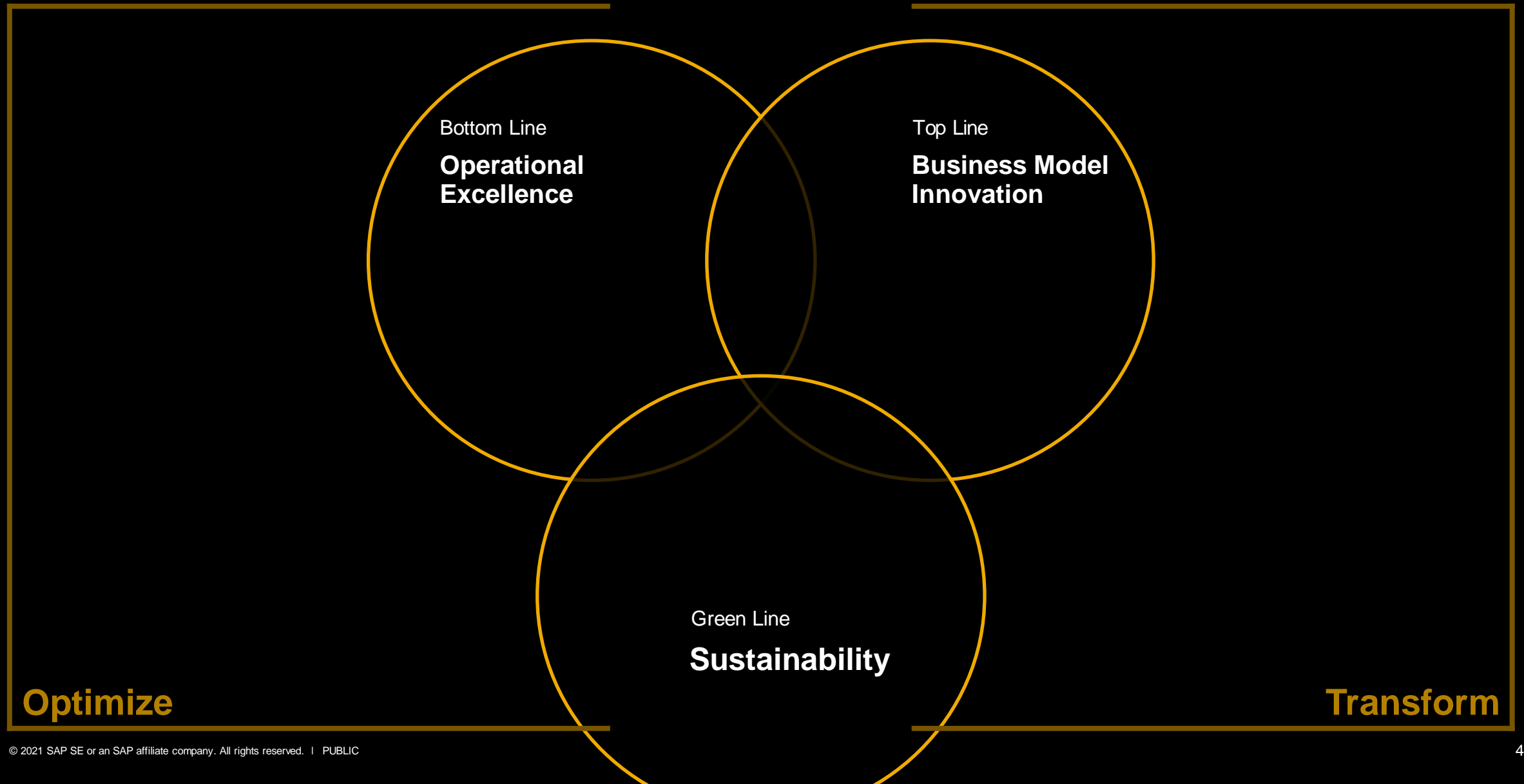
...global Automotive market is forecasted with a **solid growth** in the coming years

...world is **running short** on semiconductors

...**double-digit growth** expected in the Industry 4.0 market

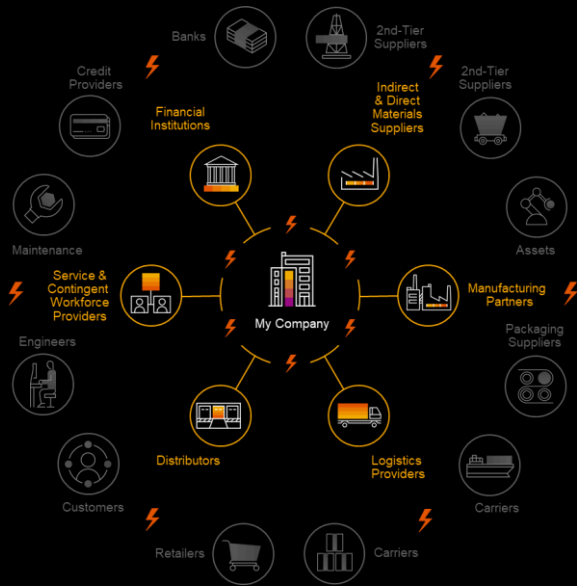
...global Industrial machinery market is expected to **constantly growth** in the next years

Digital Transformation Goals **driven by Global Industry Trends**

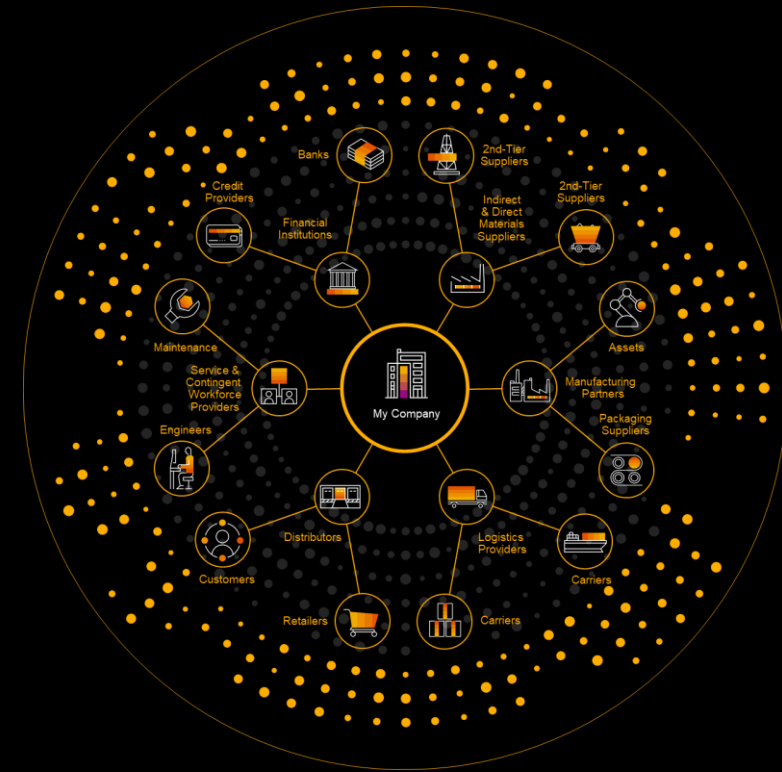


Global economy has evolved into a network economy

ERPs of the past are enterprise-centric systems that **restrict visibility & collaboration**



SAP Business Network enables Networked **Intelligent Enterprises**



Example: Transformation in the Automotive Industry

From Point to Point to Networked based Processes

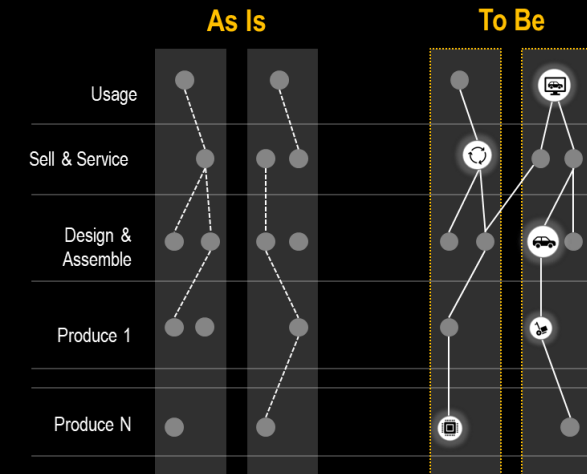
A changing Environment in the Automotive Industry

Major business disruptions of the automotive ecosystem that force the heart of the German industry to reinvent itself



One Data Driven Value Chain to a next Generation Automotive Processes

- Significant Value Potential between Industry Stakeholder & Ecosystem as a next Level to Industry 4.0
- A concept of a secure, neutral and interoperable data exchange along the value chain is needed
- Today's challenges are:
 - Lack of Trust in Data Exchange between Industry Stakeholder
 - Individual Data Silos vs. Integrated Data Chains
 - Peer to Peer Connections vs. Lack of Network Approach
 - Outdated Digital Exchange Technologies



Catena-X Automotive Network

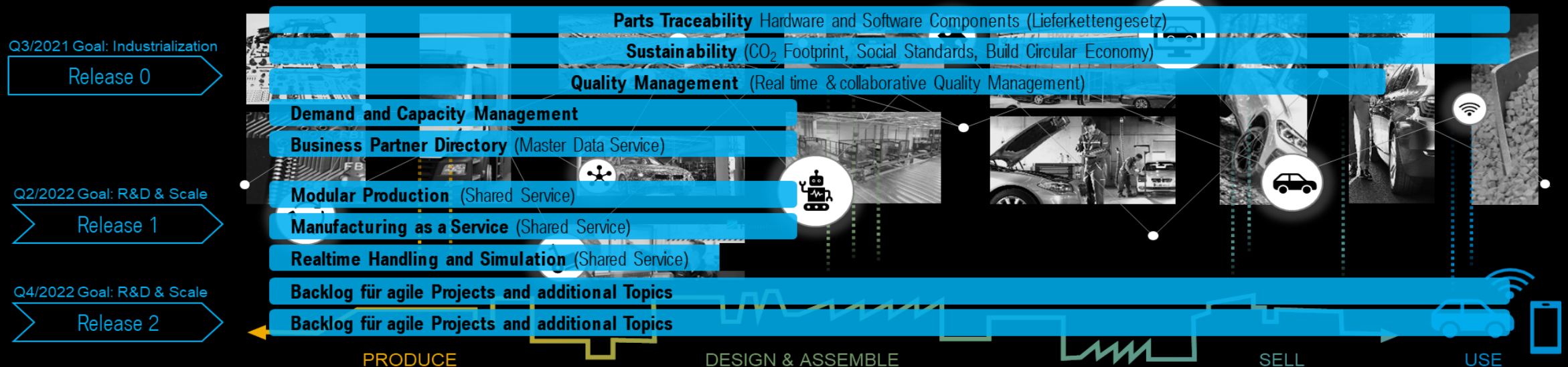
A New Way of Industry Alliance

Initial Founders and current members

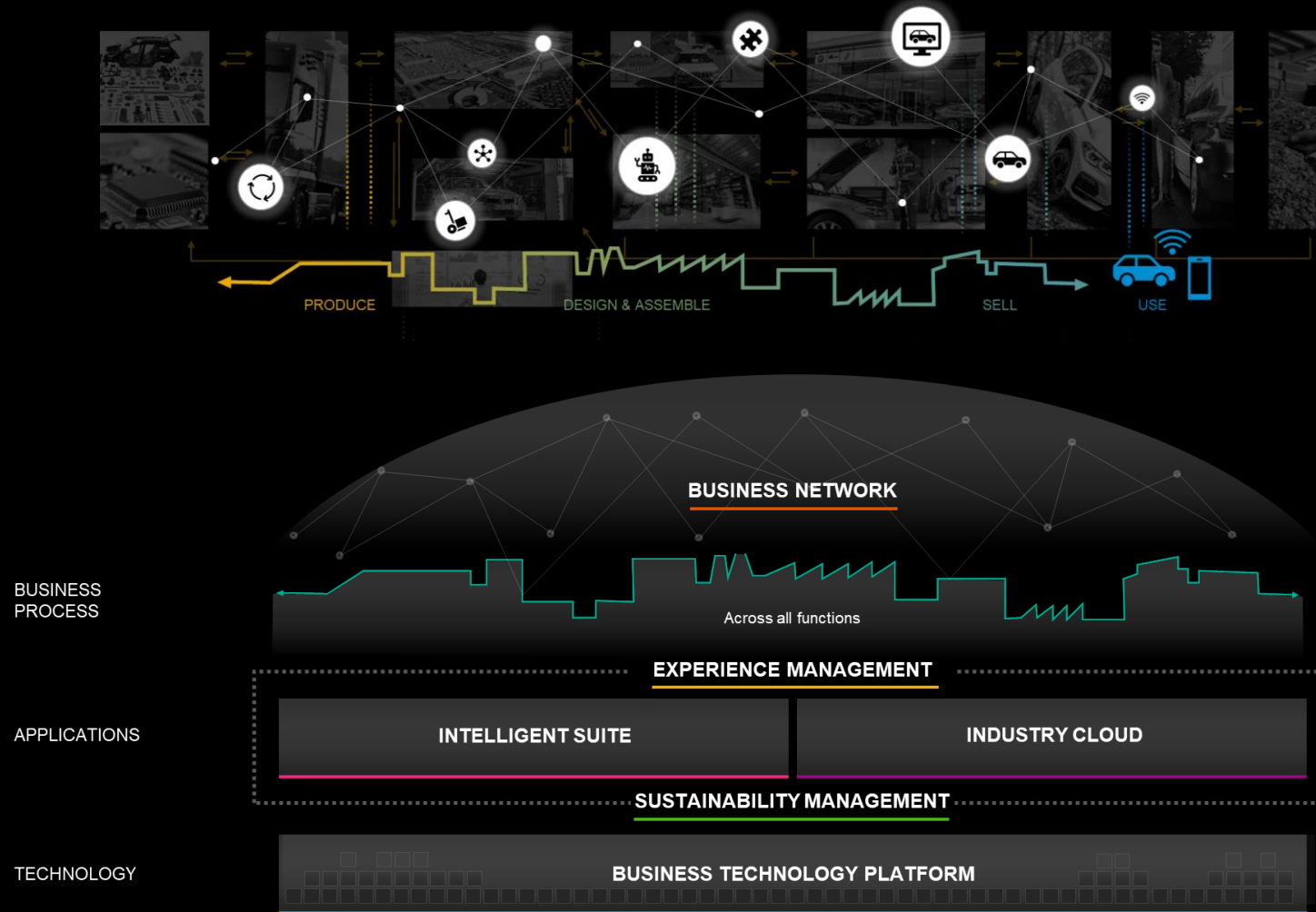


open for more partners

Initial Pioneer Use Cases



SAP Intelligent Enterprise as Key Enabler to an End to End Industry Network



Additional Industry Business Networks **Food for Thought**

Industry Value network alliances

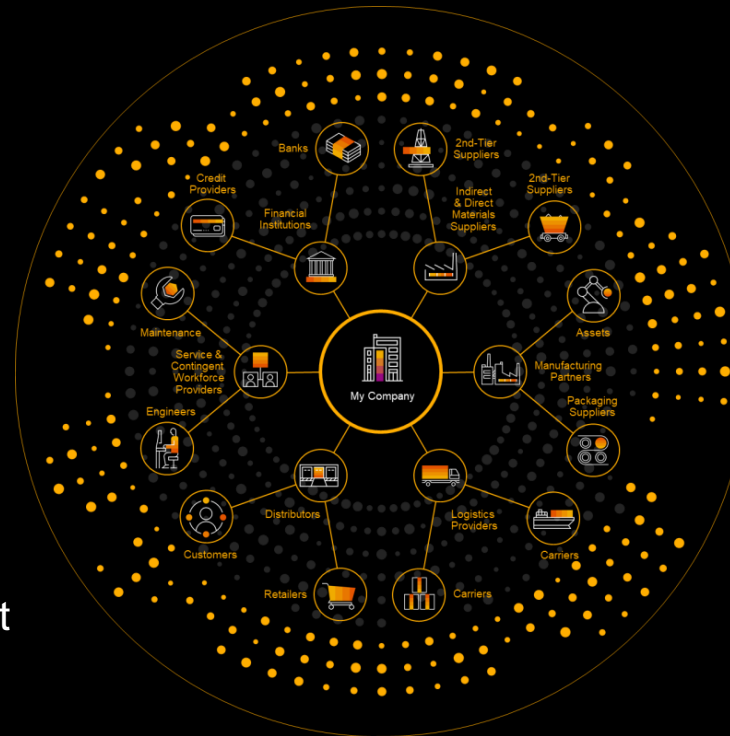
- Catena-X Automotive Network
- Open Industry 4.0 Alliance
- Global Battery Alliance

Circular Economy

- SAP Returnable Packaging Management
- SAP Rural Sourcing Management
- SAP Ariba Supplier Risk Management
- GreenToken by SAP

Network and Spend Management

- Ariba® Network
- SAP Digital Supplier Network
- SAP Fieldglass Vendor Management System



Logistics network

SAP Logistics Business Network

Network of Digital Twins & Assets

- SAP Asset Intelligence Network
- SAP Digital Vehicle Hub
- Asset Centric Contractor Network

Others

Open Innovation platform for Product development
(e.g. Chemicals & Industrial Gases)

...

Thank you.

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