



SUSTAINABLE MAGNET SUPPLY CHAIN FOR AUTOMOTIVE AUDIO

ANTON LIU

CPSM

GLOBAL PROCUREMENT DIRECTOR

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WHERE WE ARE TODAY

HARMAN AT A GLANCE



BUSINESSES



AUTOMOTIVE

Digital Cockpit, Connectivity,
ADAS, Premium Audio,
HAR Ignite SDP Cloud Services



LIFESTYLE

Consumer Audio
Professional Solutions



DIGITAL TRANSFORMATION SERVICES

Software Services and Solutions



MARKET LEADERSHIP



#1

IN DIGITAL COCKPIT



#1

IN CAR AUDIO



#1

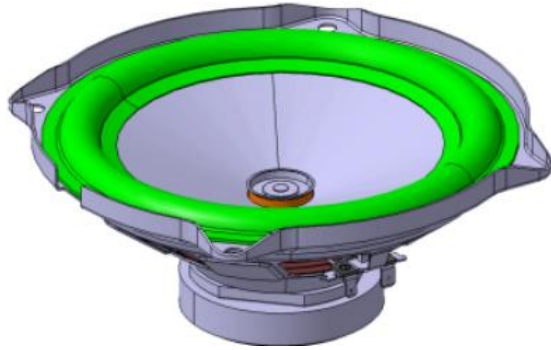
IN PORTABLE AUDIO



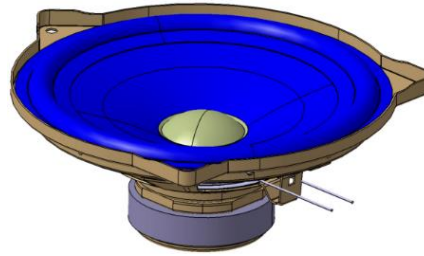
#1

IN PARTY BOXES

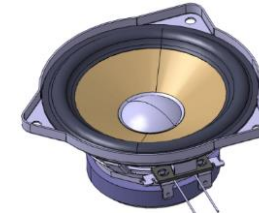
LOUDSPEAKER TYPES



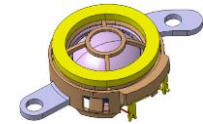
subwoofer



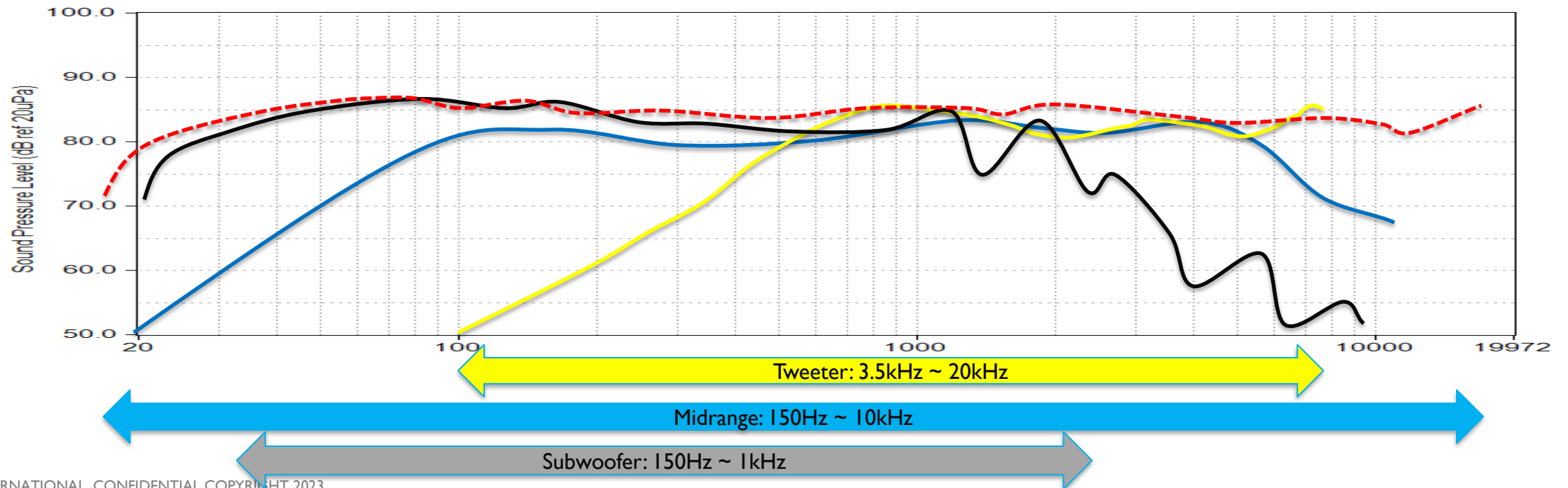
woofer



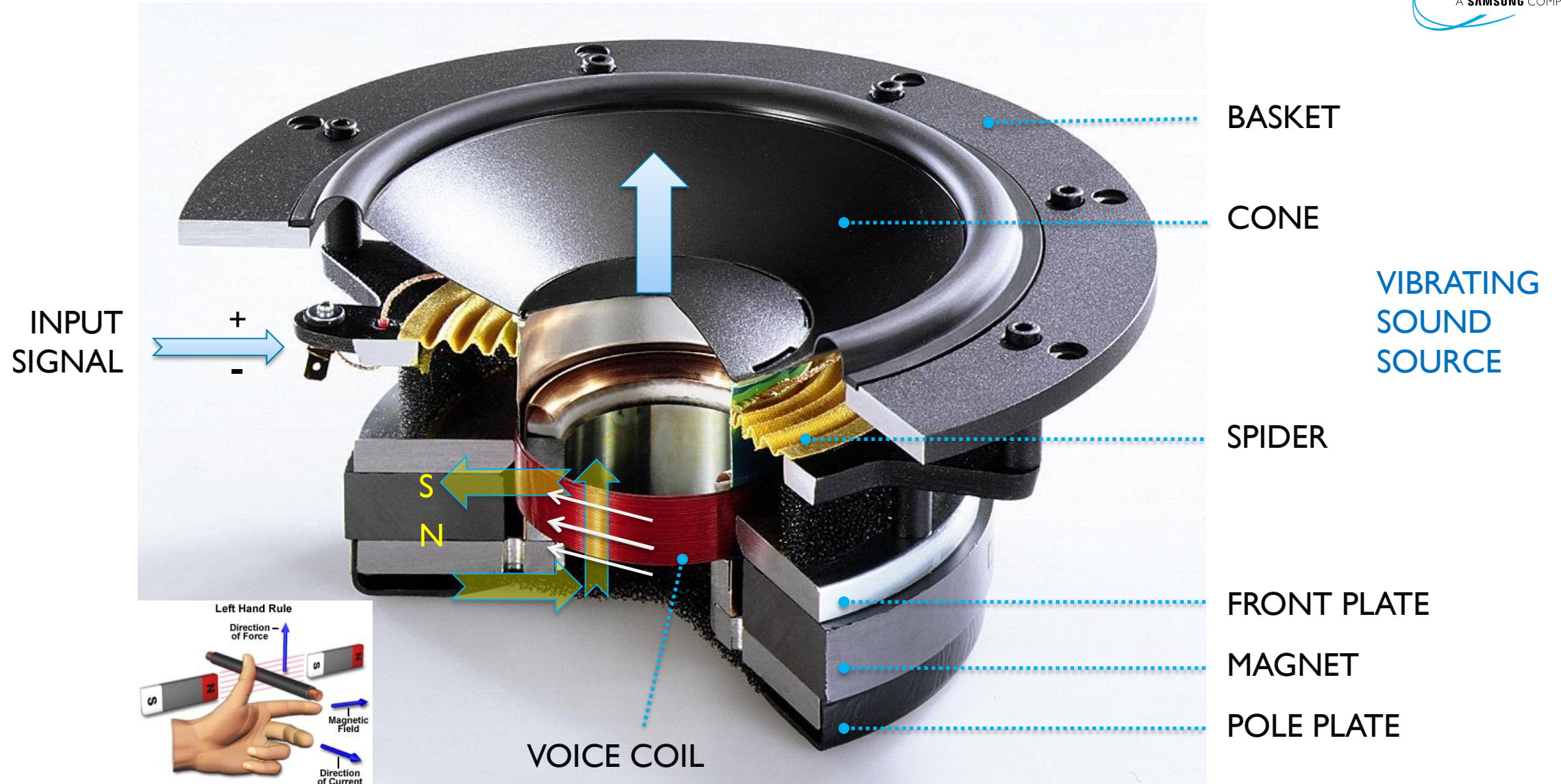
midrange



tweeter



LOUDSPEAKER STRUCTURE



NEO MAGNET TYPE AND GRADE USED IN HARMAN

Circle Magnet



Ring Magnet



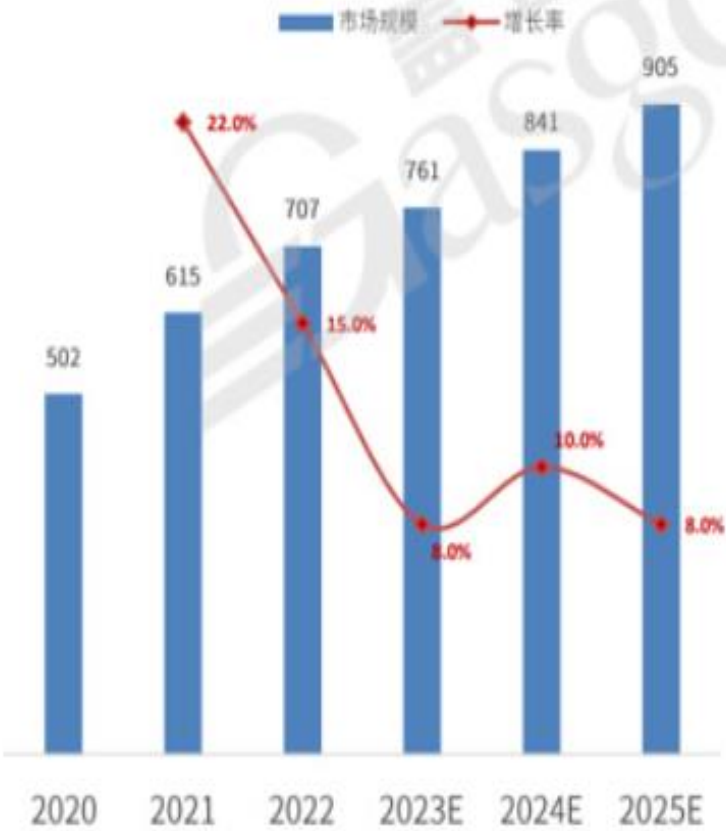
(BH) _{max} (MGOe)	N	M	H	SH	UH	EH	AH
58							
55							
52							
50							
48	Low		Low				
45	Low		High				
42	High		High				
40							
38							
35	Mid	Low	Mid				
33							
30							
28							

Grade usage
High
Mid
Low

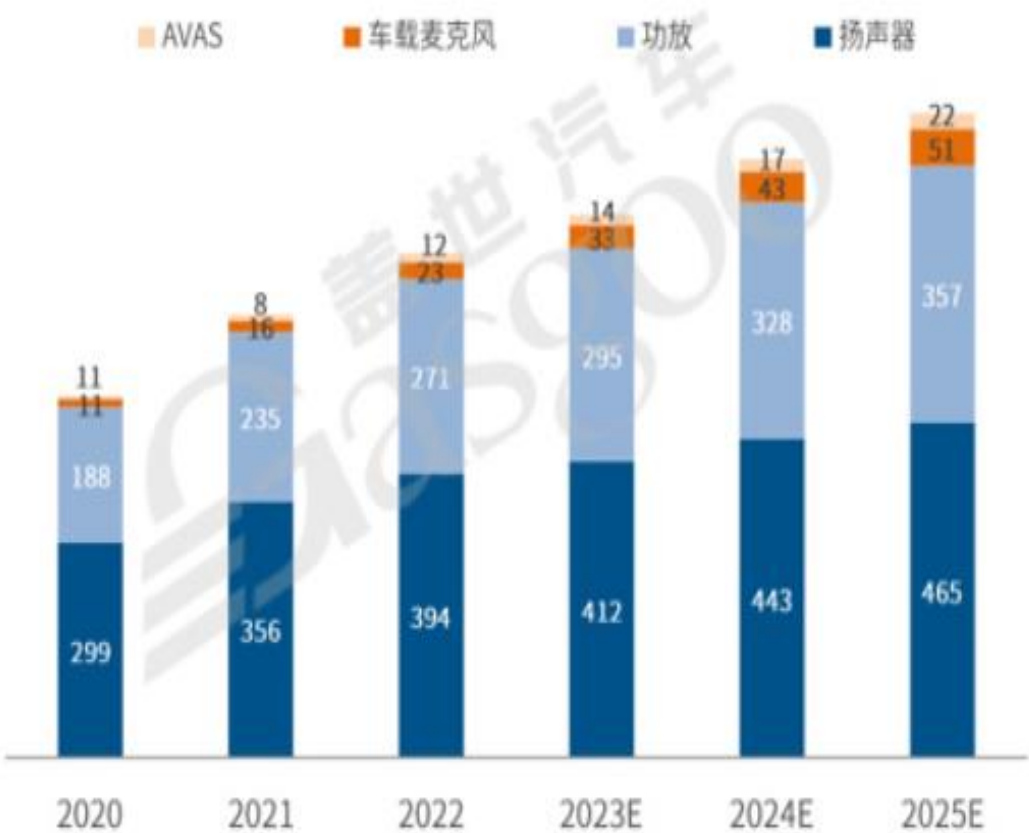
CAR AUDIO MARKET BRANDS



全球车载声学系统市场规模预测（亿元&%）



全球车载声学关键部件市场规模预测（亿元&%）



资料来源: Global Market Insights, Technavio,; 盖世汽车研究院分析

盖世汽车研究院 | <10>

BIG TRENDS



Tech-centric



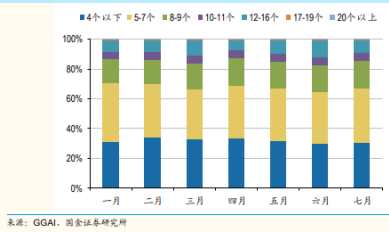
EXPERIENCE PER MILE



Human-centric



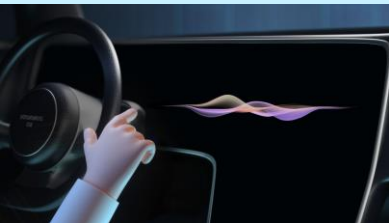
MORE AND BIGGER



	功放功率 (w)	扬声器数量
蔚来e17	1000	23
理想L9	2160	21
哪吒S	1216	21
小鹏P7	600	18
问界M5	1000	19

来源: 汽车之家, 国金证券研究所

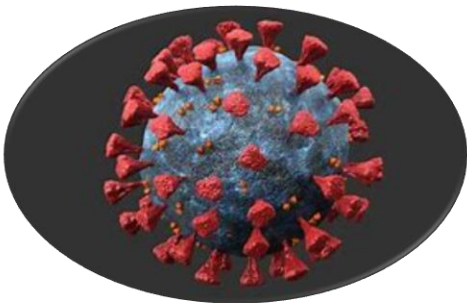
EASIER AND SMARTER



PERSONALIZED AND ENTERTAINING



SUPPLY CHAIN RESILIENCE



WHAT HAPPENED



LOCAL FOR LOCAL

Local supply from the region, for better service and more reliable



DIVERSIFY

Diversify and Multi sourcing in geographic, supplier, parts, etc.



TRANSPARENCY

Understand the whole supply chain and risk mitigation, including sub tier suppliers



COMPLIANCE

Supply Chain Compliance in labor, safety, environmental, international trade, integrity, etc.



SUSTAINABILITY

Green energy, CO2 reduction, Recycle, Reuse.
Also critical for resilience



INNOVATION

Develop new technology to reduce the usage, or alternative material with more accessibility and green

SUSTAINABILITY AT HARMAN







OUR PLATFORM IS CALLED SOUND PURPOSE







Our stated mission

To be a best-in-class employer and provider of technology solutions that are beneficial to the long-term well-being of the people and communities we serve.

CARBON NEUTRAL BY 2040 – SHORT TERM GOALS FOR 2025:

 100%	All global manufacturing to run on renewable energy
 50%	HARMAN suppliers use renewable electricity in production
 40%	Emissions reduction
 15%	Electricity reduction

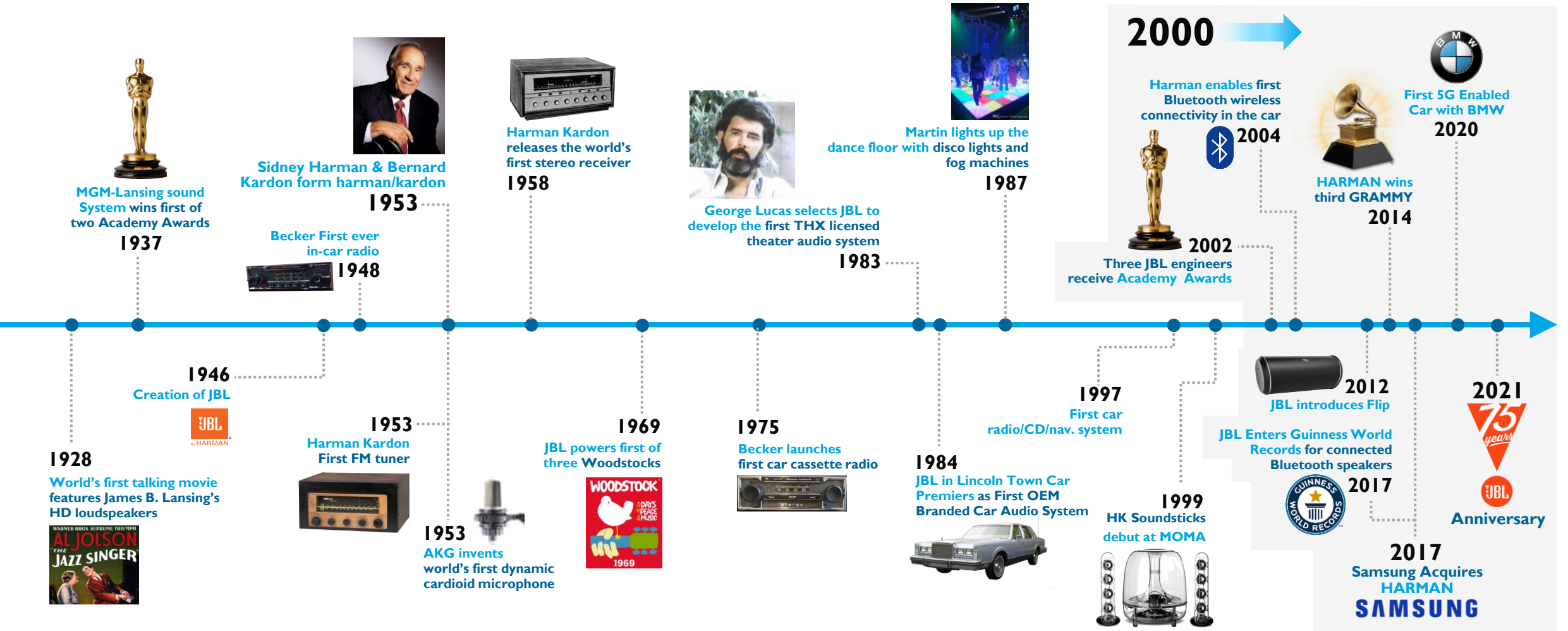
OUR FOUR FOCUS AREAS:

 Environment & Emissions	 Employee Diversity & Safety
 Products & Innovation	 Corporate Purpose

HISTORY

OUR LEGACY OF INNOVATION

Over 90 Years of Industry Groundbreaking “Firsts”



2022 Mark Levinson 50th Anniversary // 2022 AKG 75th Anniversary

WHO WE ARE

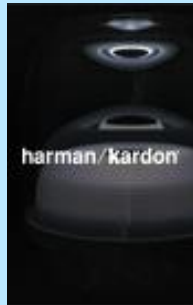
HOUSE OF ICONIC BRANDS



**AUTOMOTIVE
&
B2B BRAND**

CONSUMER – FACING BRANDS

PROFESSIONAL BRANDS



DRIVE CULTURAL RELEVANCE

LEVERAGE CULTURAL MAKERS AND MOMENTS



LANG LANG



MARTIN GARRIX



QUINCY JONES



TIGERLILY



DOJA CAT



AR RAHMAN



ADRIANO
SOUZA



GLEYBER
TORRES



VIRGI
VAN DIJK



GIANNIS
ANTETOKOUNMPO



NADES HOT



BROOK EAB



JHBTEAM



NICEWIGG



TOMMEY



RATED



ENABLE



SYTHERPK



NINJALYA



WHERE WE ARE





THANK YOU