

Bosch in the Americas:  
**The company's presence and growth opportunities at a glance**  
Focus: North America (U.S. and Mexico)

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Bosch has been active in America for over one hundred years. Today, the company's four business sectors – Mobility Solutions, Industrial Technology, Consumer Goods, and Energy and Building Technology – have a very strong presence in the region. Today, Bosch generates 20 percent of its sales in the Americas. The company's activities there are mainly concentrated in North America (17 percent), especially in the United States. Against the backdrop of stable economic development, Bosch plans to expand its activities in the Americas across business sectors in the coming years. The aim is to significantly increase value-added in the region, in line with the company's "local for local" strategy in manufacturing, development, purchasing, and management. By the start of the next decade, Bosch aims to double its sales in the Americas.

Business development: In the past five years, Bosch has increased its sales in the Americas by more than 35 percent. In North America, the growth rate was almost 40 percent. Here, sales increased 8.6 percent in 2014 (9.3 percent after adjusting for currency effects), to 8.5 billion euros. North America is and will remain a global driver of innovation. In Bosch's view, the region can thus contribute to reaching the company's aim of offering technology that is "Invented for life" around the world. The region has a sound economic base.

Associates: In total, Bosch has a workforce of some 38,000 associates in the Americas, of which about 29,000 are located in North America. The greatest number of associates (16,000) are located in the United States, followed by Mexico (12,300). The company plans to hire 12,000 graduates in North America in 2015.

Expansion/investments: Over the past ten years, Bosch has spent some three billion euros on its locations in the Americas. Of this, some 2.2 billion euros were spent in North America. In 2014, investments in the region amounted to almost

220 million euros. A significant amount was invested into the early as 2012, Bosch had already made significant investments into expanding its manufacturing activities, to the tune of some 220 million euros. The investments were mainly used to expand facilities in Bethlehem, Fountain and Plymouth in the U.S., as well as several Mexican locations. In 2013, Bosch's Drive and Control Technology division opened a new technology and service center in Houston that specializes in applications for deep-sea oil and gas platforms. In Fort Lauderdale, the company opened the first Bosch communication center in the United States in 2014.

Mexico is another focus of investment. The company's manufacturing sites in the country are an important part of its "local for local" strategy. With it, Bosch is able to supply its automotive customers' factories in North and South America directly from the region. And further investments are planned: between 2013 and 2017, a total of 460 million dollars will go toward expanding the Automotive Technology locations in Toluca and Juarez. Plans also call for expanding the Bosch plants in San Luis Potosí and Mexico City in the years ahead.

Research and development: Bosch is also continuously expanding its research and development activities in the Americas. The most recent example is located in [Guadalajara](#), Mexico, where Bosch opened a software development center in April 2014. With it, the company aims to strengthen software development activities and engineering services in the Americas, and to increase its proximity to customers.

Bosch currently employs some 2,400 researchers at its 11 R&D locations in the Americas. Of these, 2,000 are located in the United States. Sixteen years ago, Bosch Corporate Research opened its Research and Technology Center (RTC) in Palo Alto, California. It was the first such Bosch facility to be located outside of Germany. The highly qualified associates who work there are currently focusing on research trends in areas that show promise for the future. These include internet technologies, automated systems, and robotics. In addition, they are engaged in joint research with leading U.S. institutions, among them Stanford University.

With a total investment of 7.2 million euros, Bosch supports the Bosch Energy Research Network (BERN), which was founded in 2011. The initiative unites North America's top ten universities, and focuses on research in the area of transformative energy technologies. This includes wind energy, battery technology, building technology, and electromobility. The aim is to commercialize the best BERN findings and promote their use with Bosch funding. The project is set to run for a total period of eight years.

Presence: The United States is the oldest Bosch market outside of Europe. Bosch has been present there since 1906. It then entered the South American market in 1908, in Argentina. In 1910 and 1911, Bosch initiated activities in Brazil and Canada. Mexico followed in 1955. Today, Bosch has more than 100 locations in the Americas.

### **U.S.: Established market and global driver of innovation**

The United States is the second largest Bosch market after Germany. The country is still the world's strongest economy, and is a global driver of innovation. Bosch sees enormous growth potential in all four of its business sectors. According to market forecasts, the United States will continue to be the world's second largest vehicle producer beyond 2020. Bosch expects 20 million light vehicles to be produced in the region in 2020, more than ever before (2014: approx. 17 million). At the same time, demand for diesel models is growing: in the United States, Bosch considers a diesel market share of 10 percent for light vehicles by 2020 to be realistic. By the end of 2015, 52 diesel models will be available on the U.S. market. By 2018, the number is set to rise to 87.

The planned expansion of infrastructure and the focus on protecting the climate and natural resources are giving rise to new opportunities in the energy and building technology sector as well as in the area of consumer goods. As industrial manufacturing increasingly returns to the U.S. and a variety of new sectors are emerging, the need for technologies that network and digitize production is growing. With Industry 4.0, new opportunities are arising for Bosch, both as a supplier and user of these technologies. As a leading supplier of the industrial sector, Bosch stands to benefit from its strengths in the realms of both hardware and software. In addition, the factory of the future will offer many opportunities for close cooperation between Germany and the United States.

### **Mexico – important export and high tech manufacturing location:**

Today, Mexico is already a major exporter and high-tech manufacturing location (automotive industry, aerospace, electronics). In the short and medium term, the country has additional potential with regard to market access (more than 40 trade agreements) and as a result of carmakers' continuous investments in the region, for instance. What is more, Mexico is no longer only a source of cheap production. Rather, the country is increasingly an independent and dynamic growth market. Bosch already has a very good position in Mexico, and continues to see strong potential for the further development of its business there.

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*The Bosch Group is a leading global supplier of technology and services. It employs roughly 360,000 associates worldwide (as per April 1, 2015). The company generated sales of 49 billion euros in 2014.\* Its operations are divided into four business sectors: Mobility Solutions, Industrial Technology, Consumer Goods, and Energy and Building Technology. The Bosch Group comprises Robert Bosch GmbH and its roughly 440 subsidiary and regional companies in some 60 countries. Including its sales and service partners, Bosch is represented in roughly 150 countries. This worldwide development, manufacturing, and sales network is the foundation for further growth. In 2014, Bosch applied for some 4,600 patents worldwide. The Bosch Group's strategic objective is to create solutions for a connected life. Bosch improves quality of life worldwide with products and services that are innovative and spark enthusiasm. In short, Bosch creates technology that is "Invented for life."*

*The company was set up in Stuttgart in 1886 by Robert Bosch (1861-1942) as "Workshop for Precision Mechanics and Electrical Engineering." The special ownership structure of Robert Bosch GmbH guarantees the entrepreneurial freedom of the Bosch Group, making it possible for the company to plan over the long term and to undertake significant up-front investments in the safeguarding of its future. Ninety-two percent of the share capital of Robert Bosch GmbH is held by Robert Bosch Stiftung GmbH, a charitable foundation. The majority of voting rights are held by Robert Bosch Industrietreuhand KG, an industrial trust. The entrepreneurial ownership functions are carried out by the trust. The remaining shares are held by the Bosch family and by Robert Bosch GmbH.*

Additional information is available online at [www.bosch.com](http://www.bosch.com) and [www.bosch-press.com](http://www.bosch-press.com), <http://twitter.com/BoschPresse>.

*\*The sales figure disclosed for 2014 does not include the former joint ventures BSH Bosch und Siemens Hausgeräte GmbH (now BSH Hausgeräte GmbH) and ZF Lenksysteme GmbH (now Robert Bosch Automotive Steering GmbH), which have since been taken over completely.*