

DRIVING THE ELECTRIC REVOLUTION

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01

MARKET CONTEXT

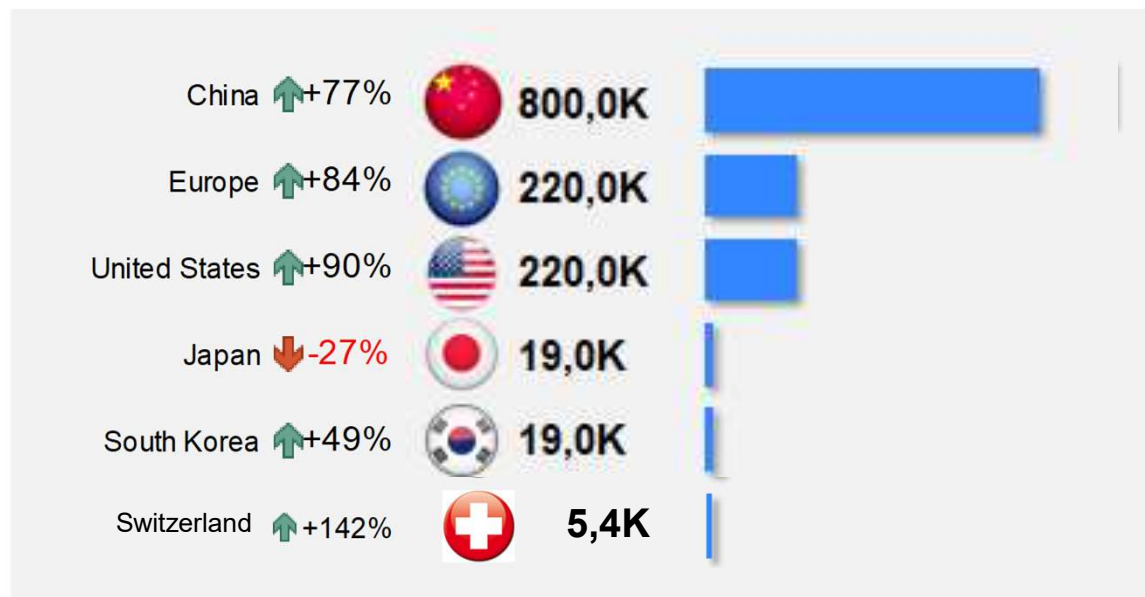


WORLD EV MARKETS

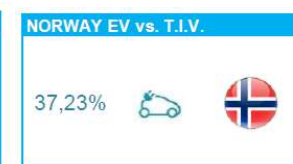
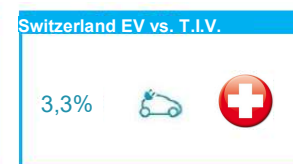
Only battery electric vehicles PC + LCV
 EUROPE = SIM | CHINA = CPCA | REST = JATO
 CHINA : excluding low speed BEV's
 Excludes BMW i3 REX and Twizy (except for Korea)



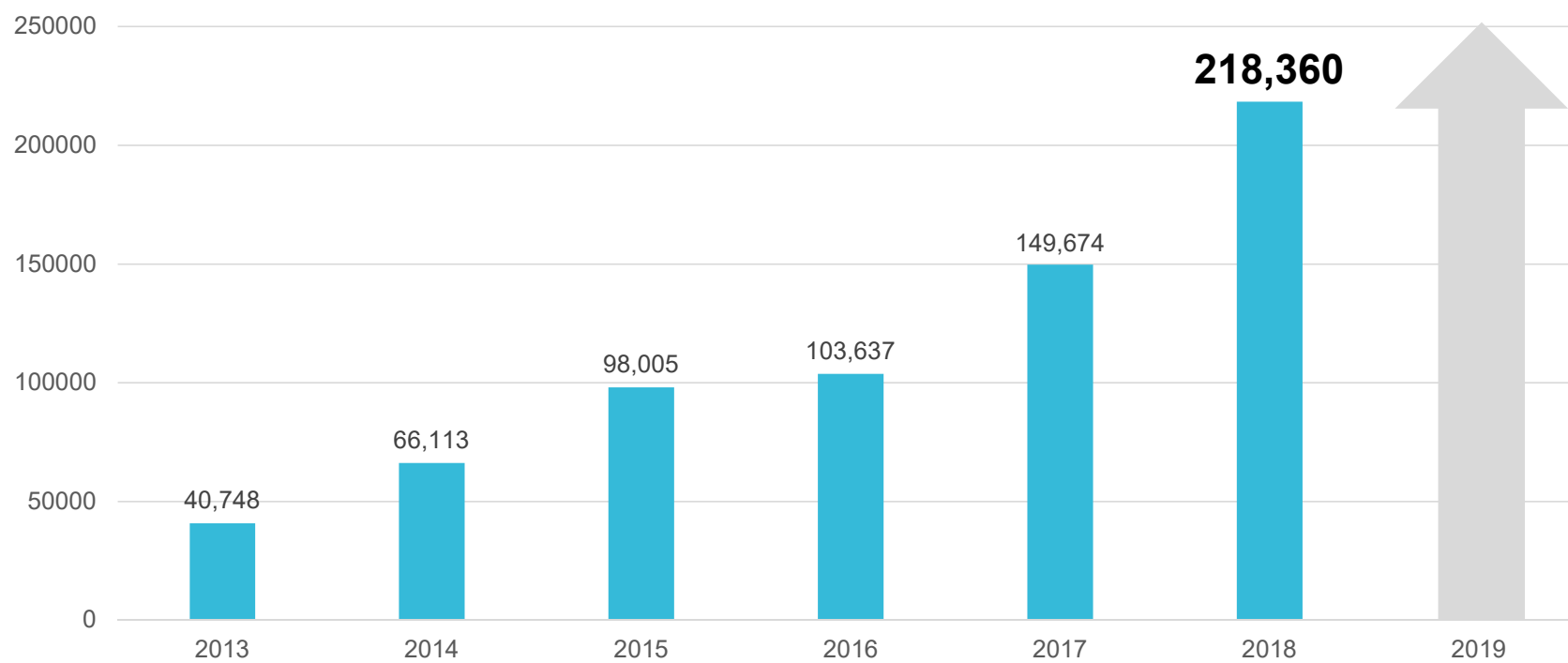
WORLD
1300,0K
 ↑ +74%



Europe data : SIM-BI4 figures, Data out of Europe : JATO figures
 evolutions are versus YTD 2018



EUROPEAN EV MARKET



EV WILL BECOME MAINSTREAM

INFRASTRUCTURE & AUTONOMIE

CHARGING SPOTS & RANGE INCREASE

- ✓ Europe: 220k public charging spots end 2020
- ✓ China: > 4M end 2020
- ✓ Range : > 500km real (WLTP) by 2022

COST DOWN

EV TCO COMPETITIVE VS ICE FROM 2020 (FOR RENAULT)

- ✓ Battery cost decrease by 30% in USD/kWh vs previous generation

MARKET GROWTH

WORLDWIDE EV MARKET FORECAST CLOSE TO 10%

- ✓ Average forecast of main analysts for 2025

CHOICE AVAILABLE

> 85% OF NEW CAR SOLD UNDER CAFE REGULATION

- ✓ + Purchase Incentives + Growing ICE ban

REGULATION & POLICIES

250 MODELS ANNOUNCED BY OEMS BY 2022

- ✓ In all car segments (vs. 70 in 2017)

02

GROUPE RENAULT, ELECTRIC VEHICLES FOR ALL



10 YEARS OF EV EXPERIENCE IN FAVOUR OF ELECTRIC MOBILITY FOR ALL

TECHNICAL EXCELLENCE



ZOE FLINS



e-Motor CLEON



Kangoo Z.E.
MAUBEUGE



Battery pack
TECHNOCENTRE

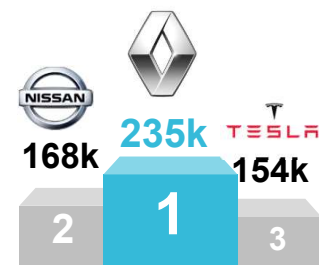
COMPLETE ECOSYSTEMS



30 000
PEOPLE **EV** TRAINED

100%
TRAINED DEALERS
(SALES & AFTER-
SALES)

EV LEADER IN EUROPE



Cumulated total EV sales
(YTD 07/2019)

N°1 IN ELECTRIC CARSHARING

mobility

60 ZOE

ELECTRIC VEHICLES, PROFITABLE CORE BUSINESS FOR THE GROUPE

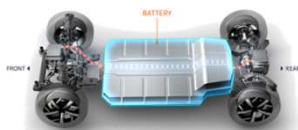
EV line-up &
geographic extension

Keep leadership in
affordable e-mobility

Provide to clients
« *easy electric life* »



a line-up of 8 pure
EV models in 2022



80% models on
Alliance platforms



> 500 Km real
400Km highways



Key segments
coverage



New e-motor
New batteries



Recharging
>150 km in
15 min in 2022



Breakthrough
In China



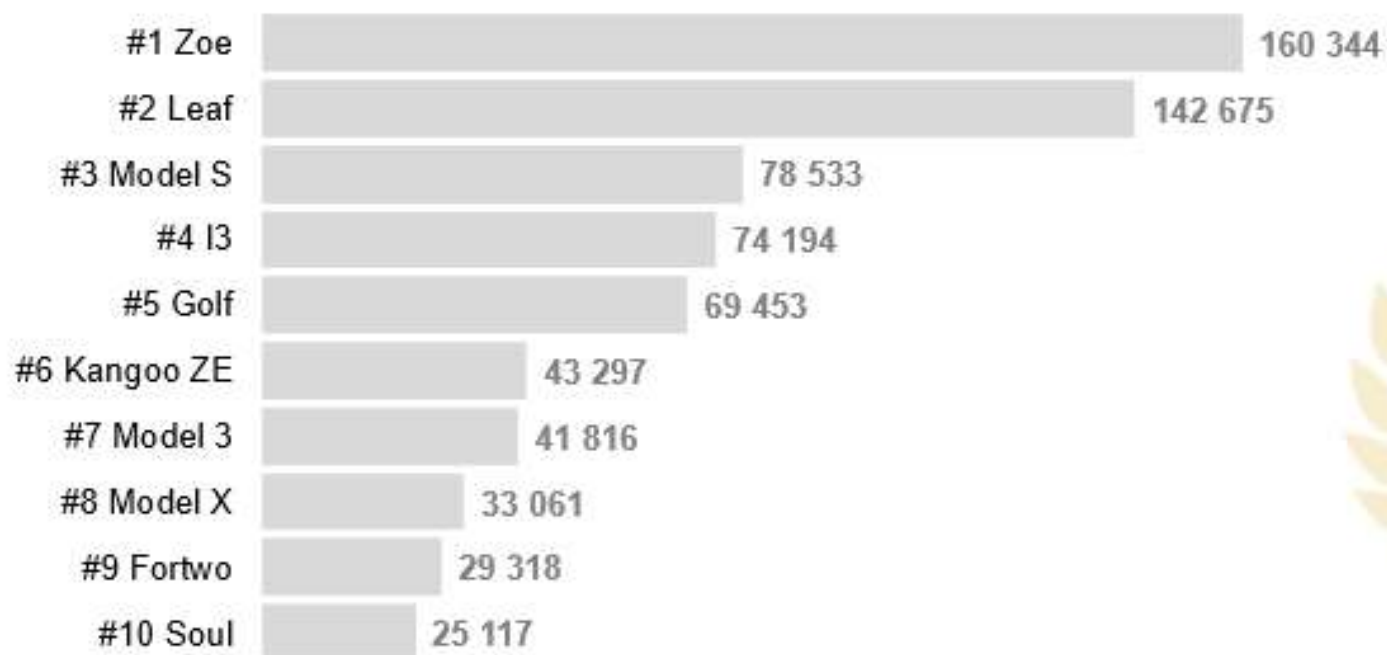
TCO* tipping point:
2021 B-segment
2023 C-segment



Generate value from
energy and mobility
sectors

／ ZOE REMAINS THE BEST SOLD EV SINCE 201

EV sales in Europe, full History (JULY 2019)

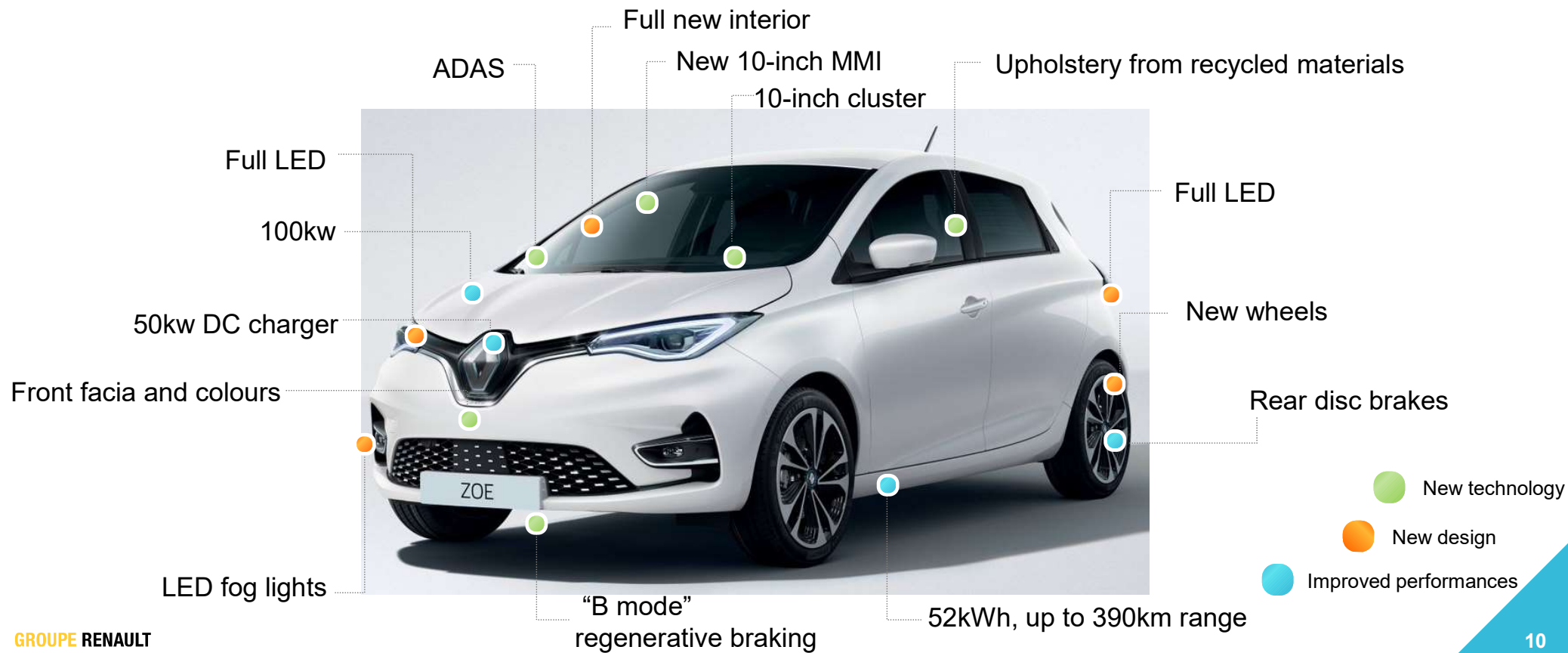


NEW ZOE

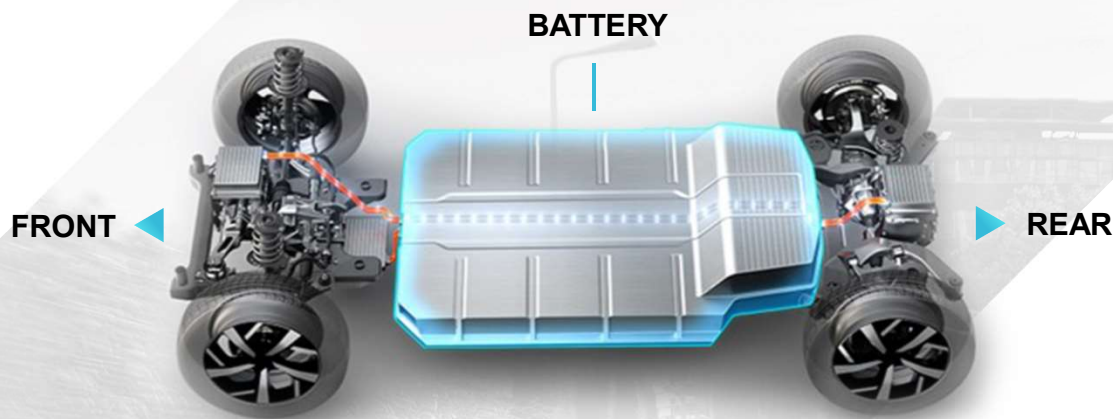
ASSERTIVE DESIGN

AT THE FOREFRONT OF EV PERFORMANCE

HI-TECH FOR ALL



CMF-EV



NEW ALLIANCE PLATFORM, DEDICATED TO EV

①

- 40% R&D Entry Ticket reduction
- 30% manufacturing cost reduction

NEW ALLIANCE E-MOTOR GENERATION

②

- More output
- 20% cost vs current

NEW BATTERY PACKS, FOR THE ALLIANCE NEEDS

③

- 30% in \$/kWh vs 2016 at pack level

NEW EV GENERATION

INNOVATIVE PRODUCTS



**INNOVATIVE DESIGN
OUTSTANDING
PROPORTIONS**



**ROOMINESS /
COMFORT
LIFE ON BOARD**



**HIGH
PERFORMANCE**



**ADVANCED
TECHNOLOGY
AND AD**

NO MORE OBSTACLES TO FALL IN LOVE WITH EV



**VERY
LONG RANGE
>500km WLTP**



**QUICK
(RE)CHARGE
>150 km in 15 min**



**EV TCO
< ICE**

B-segment – 4 years – 12,000km/y

BUILDING TOMORROW'S ELECTRIC ECOSYSTEM



ENVIRONMENT

INTELLIGENT

SMART GRIDS

FLEXIBLE

AUTONOMOUS

data
CONNECTIVITY



CONNECTED

THANK YOU



GROUPE RENAULT