

# Planet ZEV – Clean Cars? OEM strategic response

ITF Expert Workshop: International best practices to promote eco-friendly cars

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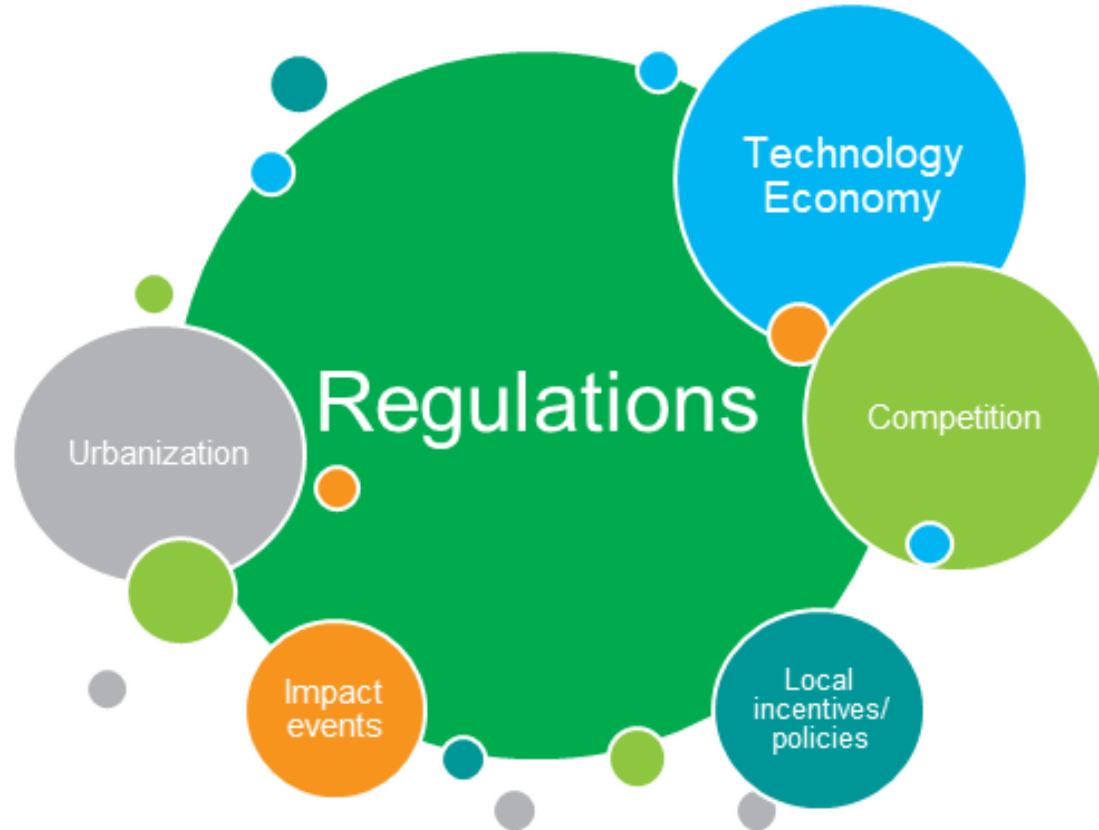
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## Planet ZEV – Clean Cars?

*Global clean car market drivers: Multi-dimensional pressures and challenges*

- OEMs need to push EVs into the market to be CO<sub>2</sub> compliant
- As regulatory pressure increases more EV nameplates are likely to be offered (with different brands, segments, body styles), but it is a balancing question to offer the right EV portfolio at the right time
- OEMs set EV strategies with large scale investment programs
- Two major BEV strategies: dedicated vs. multi-energy platforms
- Greater Alternative Propulsion vehicle consolidations expected to happen (e.g. PSA-FCA, VW-Ford)

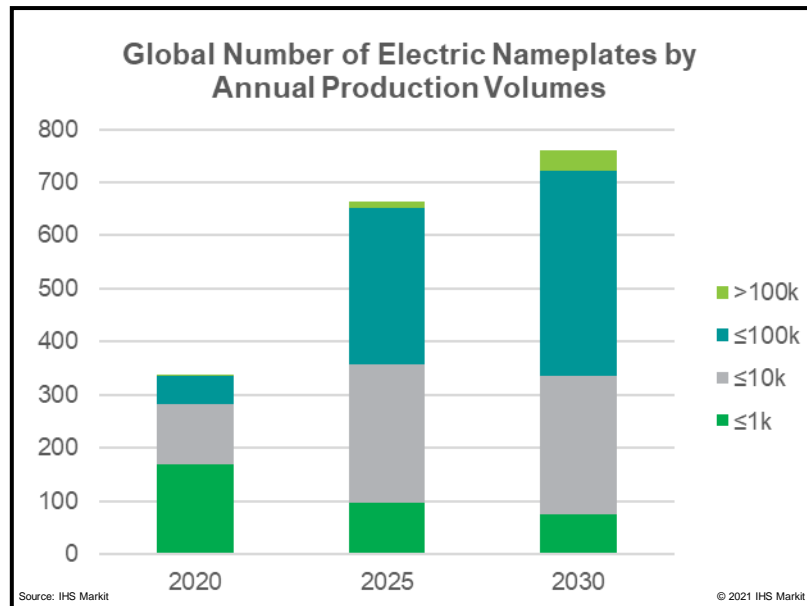


**Strong growth of global ZEV vehicle production/sales primarily caused by legislative forcing**

## OEM strategies not all aligned... due to geographical differentiation

*Electrification will be supported through different approaches and vehicle architectures*

- Vehicle platforms or architectures that enable electrification vary by OEM.
- Initial approach by many OEMs was to convert conventional platforms, but these vehicles suffered from ‘compromises’ resulting in undesirable EVs.



### Multi-energy platform

Initially designed to cater to both battery electric and conventional powertrain vehicles. Structure is not skateboard style but is more flexible than a conventional platform



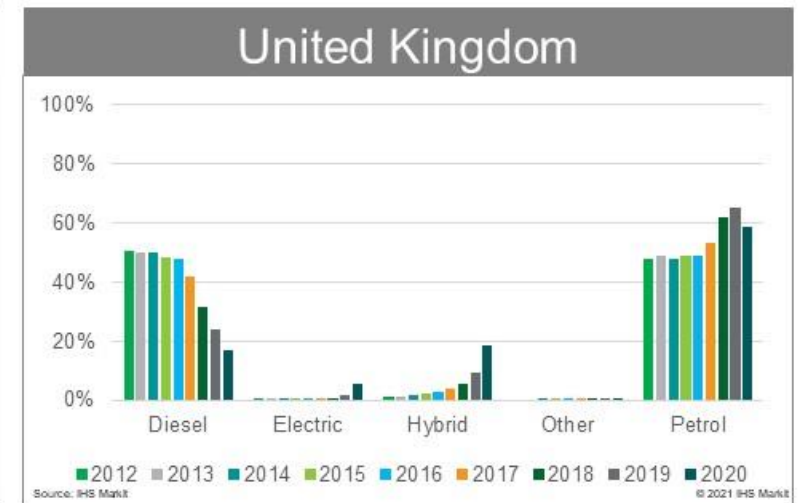
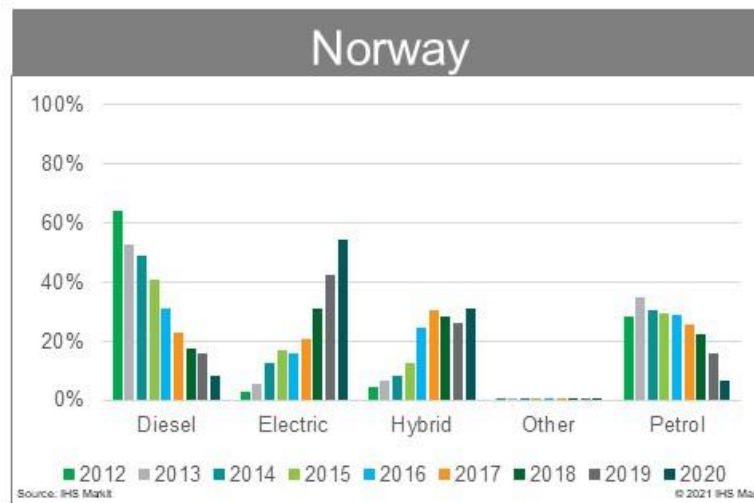
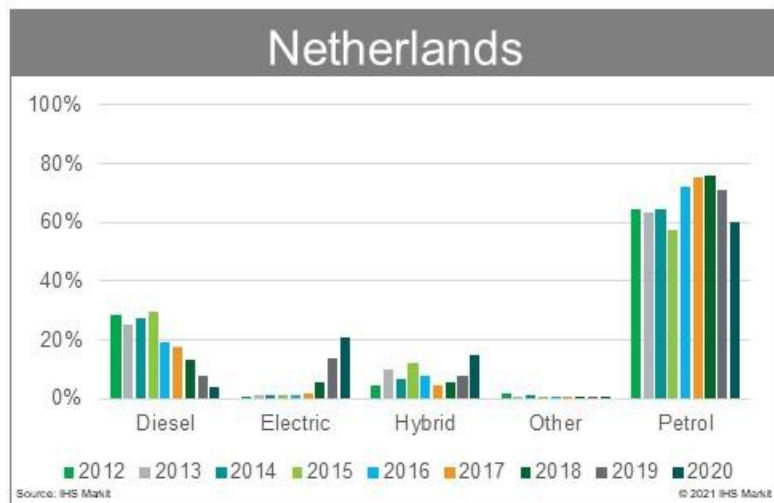
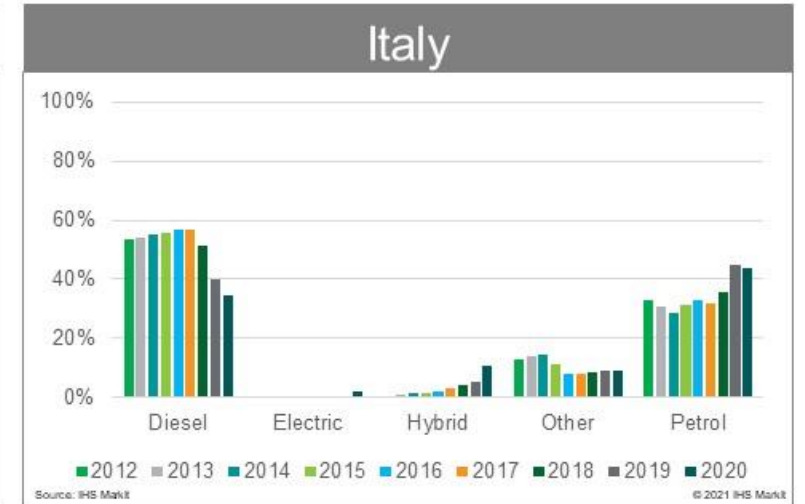
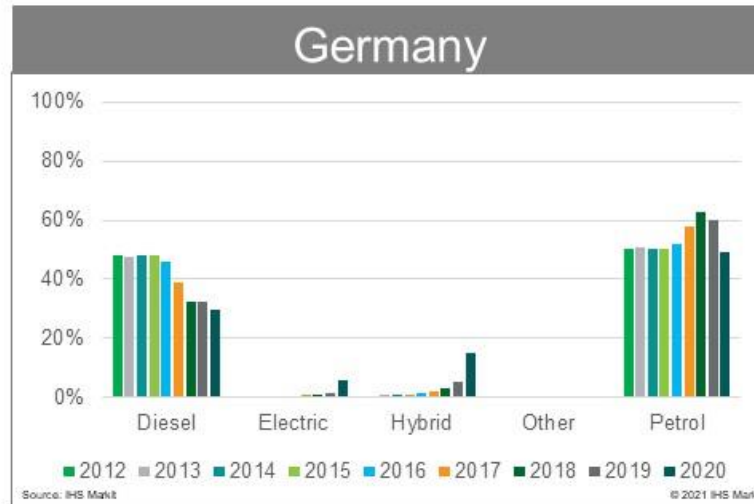
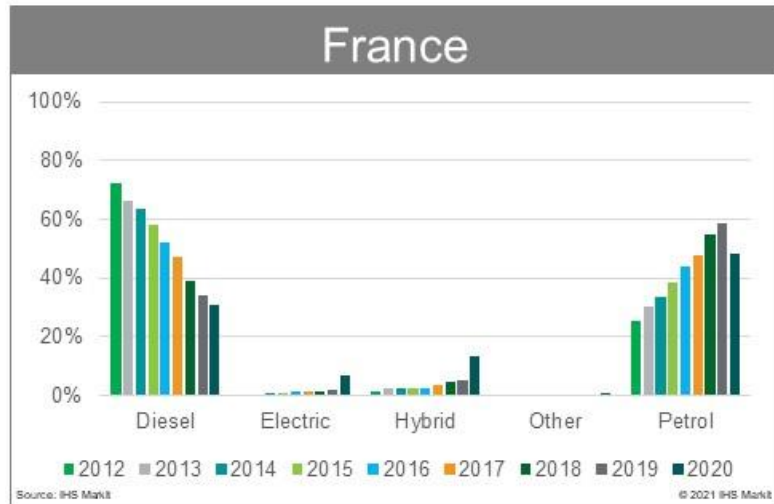
### Dedicated battery electric vehicle (BEV) platform

Platform is designed from scratch and only for pure BEV applications. Skateboard-style architecture, allows for more battery capacity and more interior space with the same vehicle size.



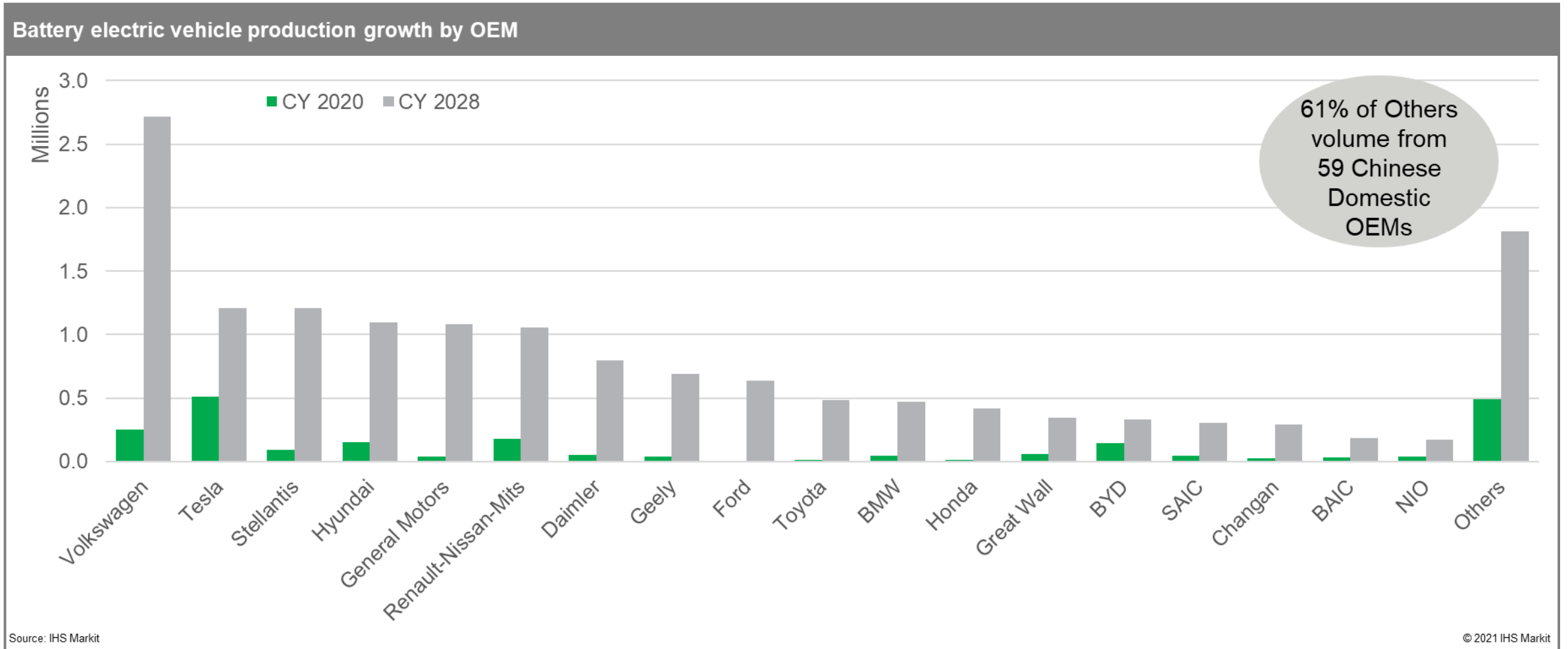
# Fuel type sales trends—European Passenger Car Market

*Diesel doubts roll on & EU28 fleet targets contributing to widening electrification interest*



## Battery electrification likely to strengthen position of established players

*Finding more than one disruptor may be difficult and consolidation is needed*



thank you!

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