Planet ZEV – Clean Cars? OEM strategic response

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

25th January 2021

Tom De Vleesschauwer, Executive Director

Transport & Mobility Practice Leader

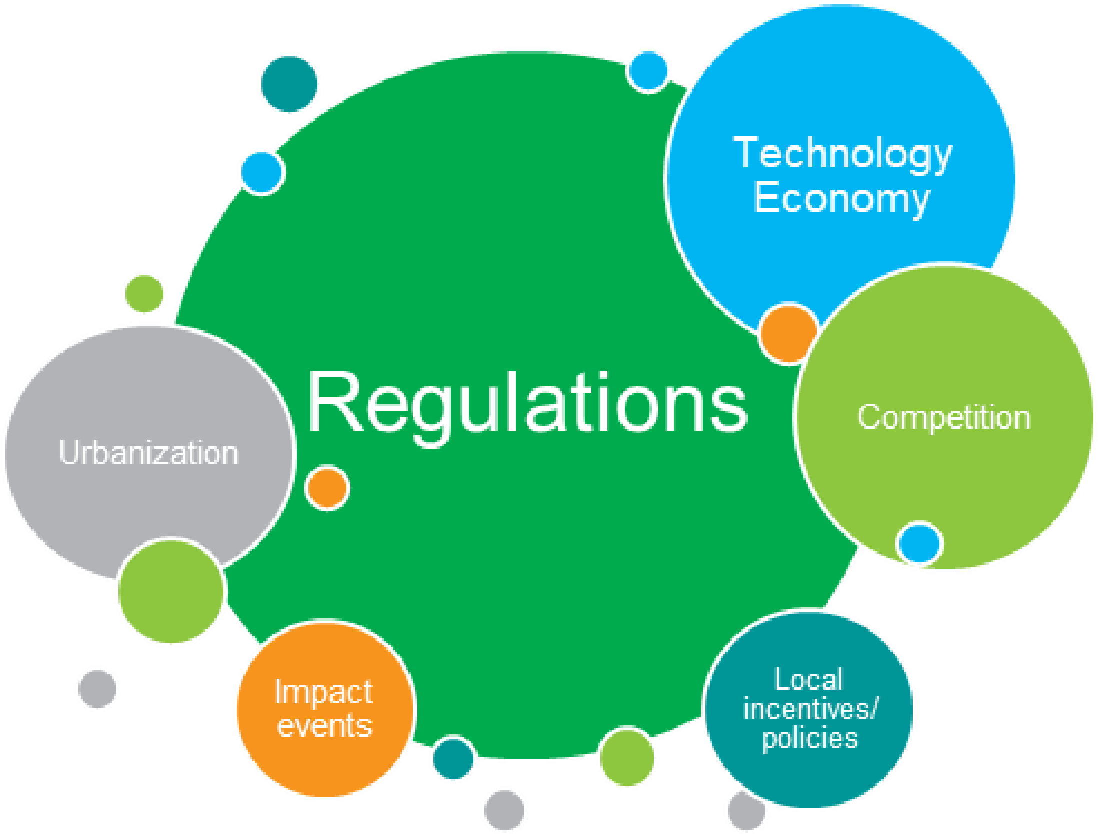
tom.devleesschauwer@ihsmarkit.com

@tdv_auto

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_2 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)

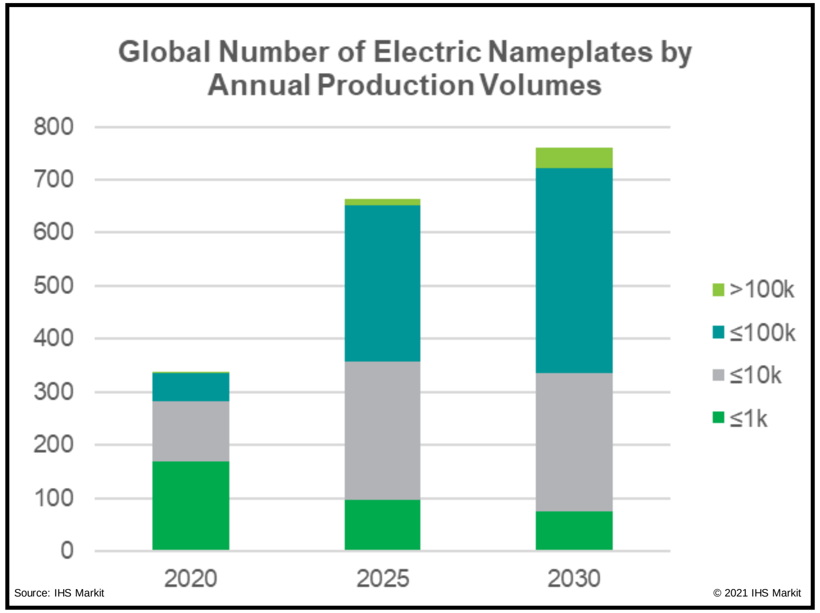


Strong growth of global ZEV vehicle production/sales primarily caused by legislative forcing

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.

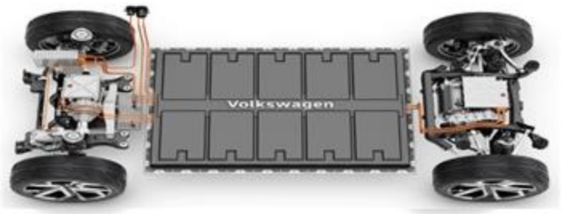


Multi-energy platform

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

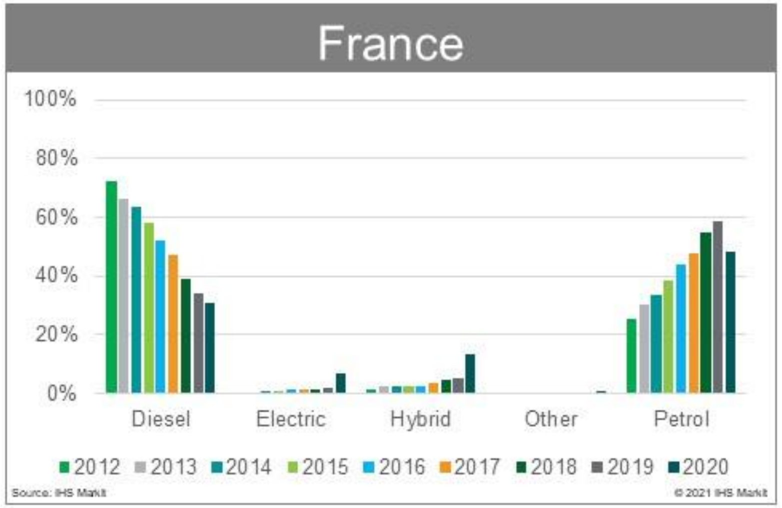
Dedicated battery electric vehicle (BEV) platform

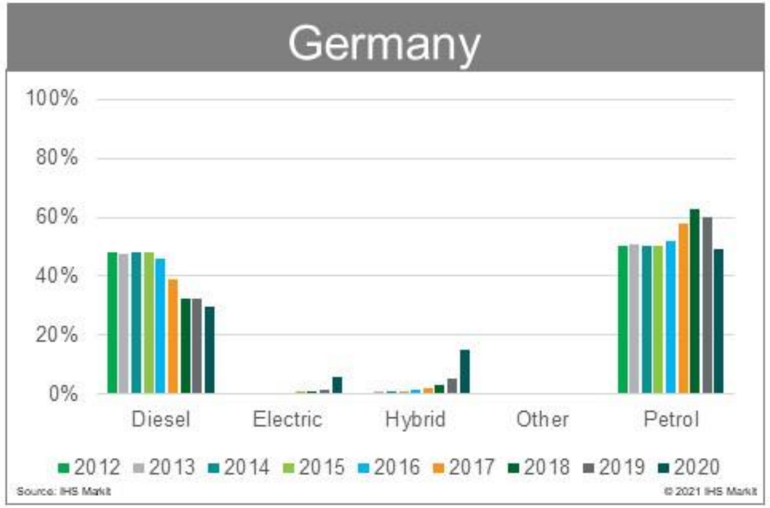
Platform is designed from scratch and only for pure BEV applications. Skateboard-style architecture, allows for more battery capacity and more interior space with the same vehicle size.

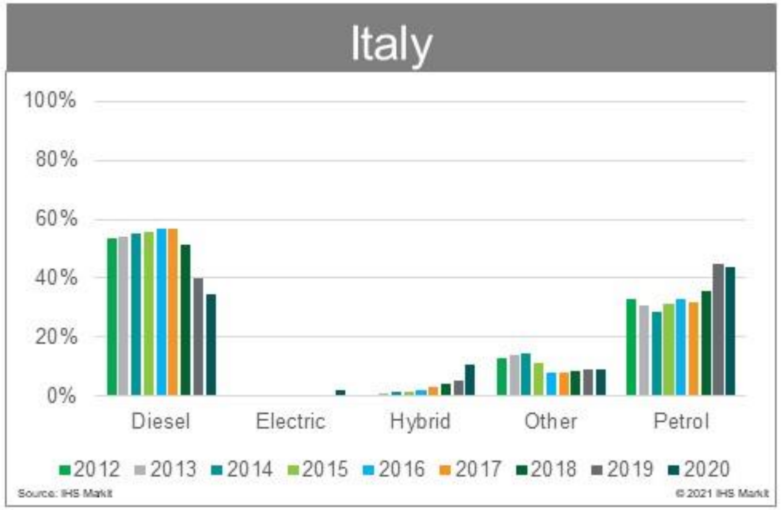


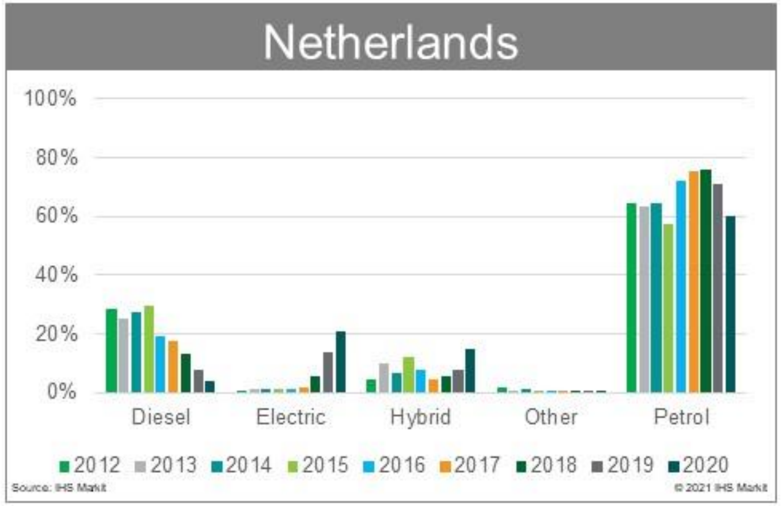
Fuel type sales trends—European Passenger Car Market

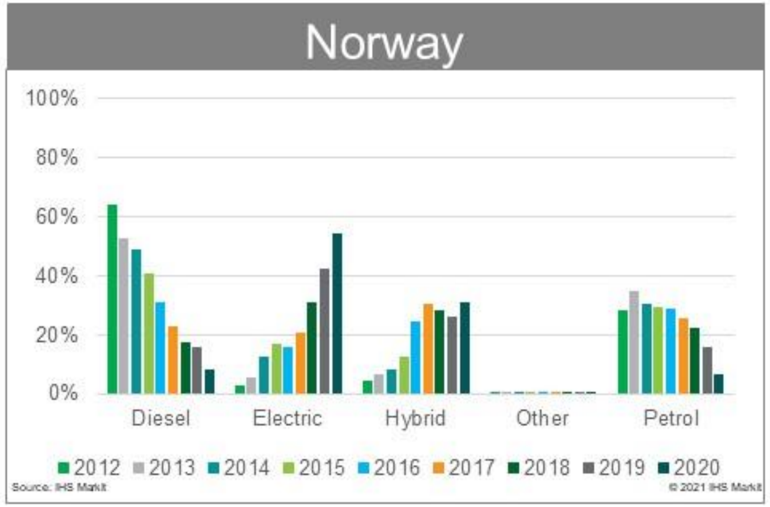
Diesel doubts roll on & EU28 fleet targets contributing to widening electrification interest

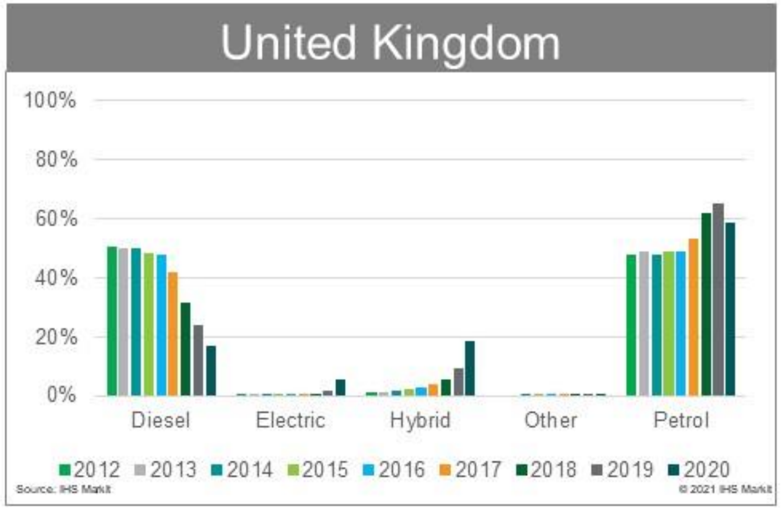










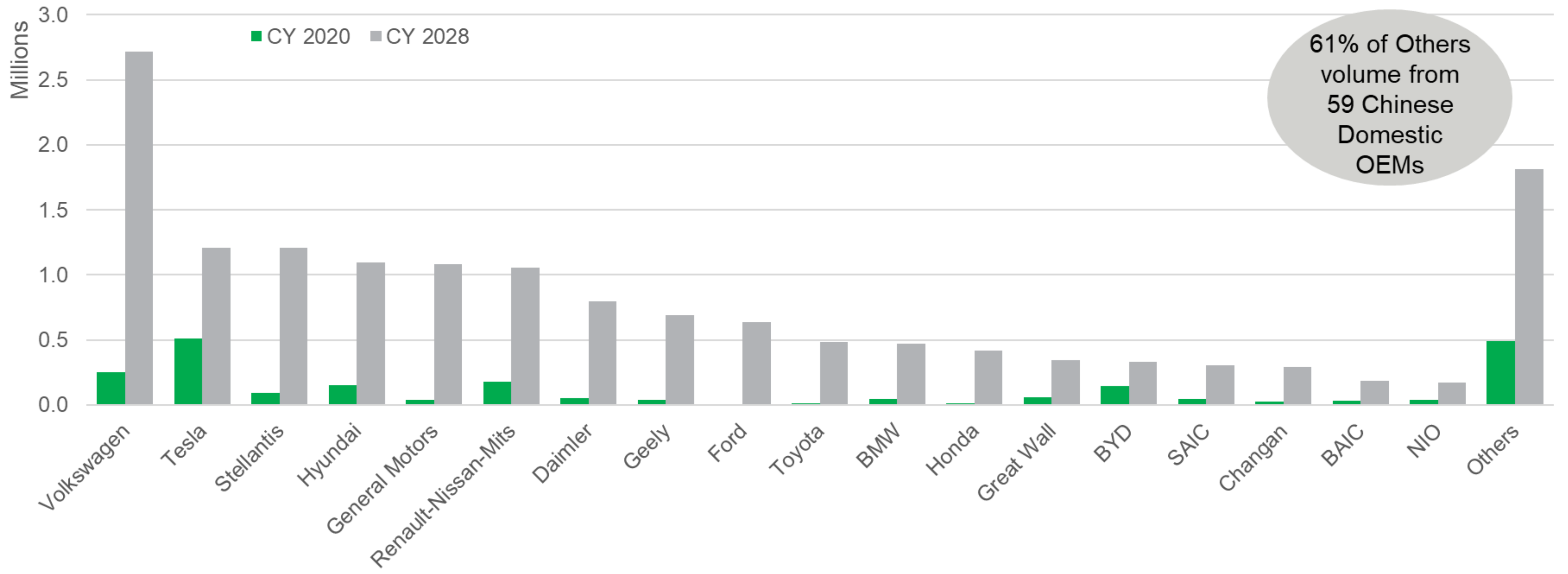


Latest actual data: Jan-Dec 2020 for France, Netherlands, Norway; Jan-Nov 2020 for Germany, Italy and UK

Battery electrification likely to strengthen position of established players

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

Battery electric vehicle production growth by OEM



Source: IHS Markit

thank you!

IHS Markit Customer Care

CustomerCare@ihsmarkit.com

Asia and the Pacific Rim

Japan: +81 3 6262 1887

Asia Pacific: +604 291 3600

Europe, Middle East, and Africa: +44 1344 328 300

Americas: +1 800 447 2273

Contact

Tom De Vleesschauwer

Executive Director

Head of Mobility Research

tom.devleesschauwer@ihsmarkit.com

IHS Markit®