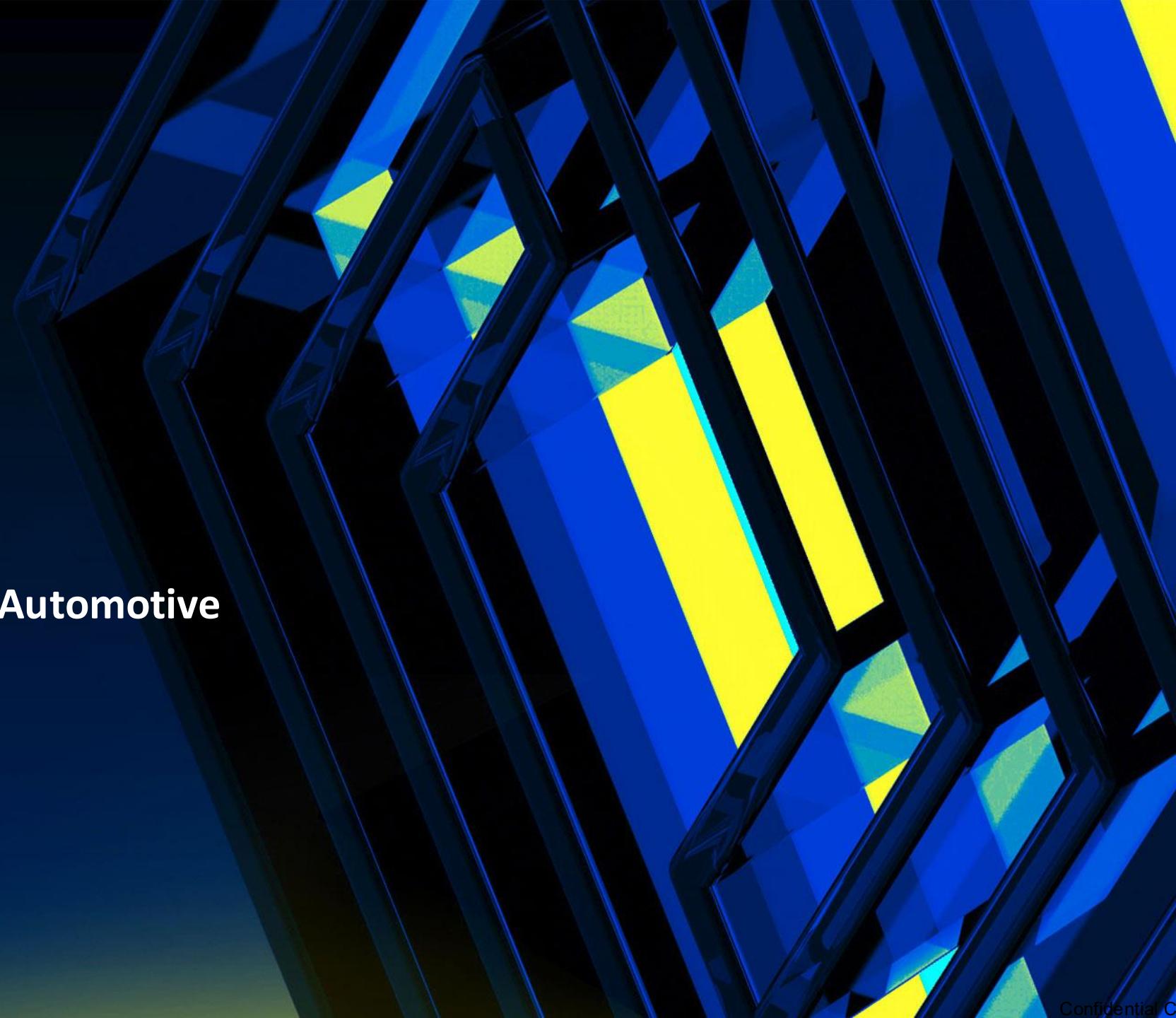


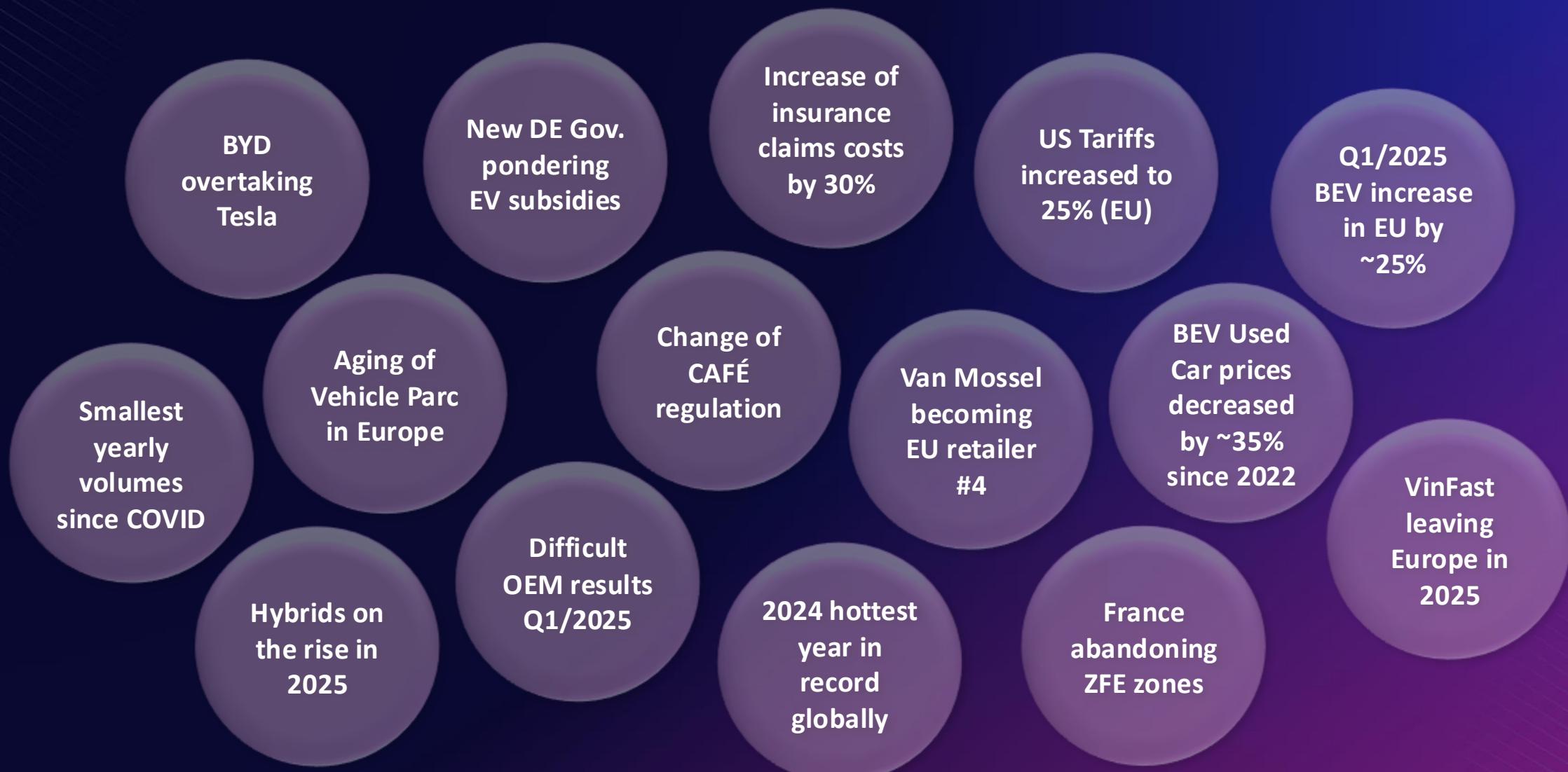


# **Keynote Speech:** **Weathering Disruption in the Automotive Ecosystem**

**Bruno Hohmann**  
**Global VP Sales**

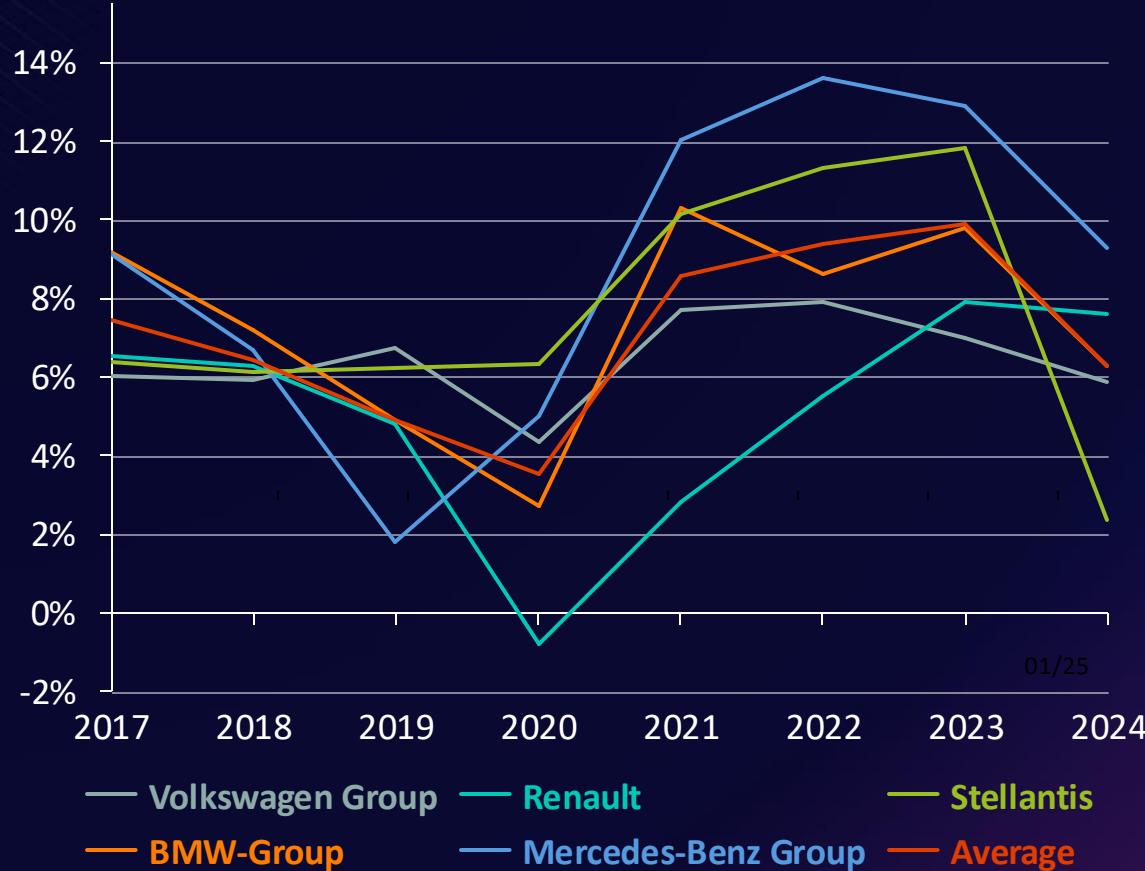


# Disruption on all fronts – Some Data Points



# Evolution of Margin of OEMs

## EBIT Margins of European OEMs, in %



- Recent margin erosion for all OEMs
- Following on from “good Covid times” with above-historic averages
- Higher costs, increasing competition, lower demand impact margin levels
- Normalization of margins in the short / medium term?

# Customer and Assets are Changing

## More cautious spending

- New Car prices rise faster than income
- Upper class cautious on NC spend
- Middle class lose purchasing power, shift to UC

## EV hesitation persists

- OEMs must sell EVs, but customers are still hesitating
- Perceived as expensive, less convenient, limited incentives left

## Role of UCs growing

- Car park getting older
- UC business more professional, more viable option for B2B and B2C
- Customers keep cars longer, older cars more accepted

French car park age evolution in years, m cars



# Renault Weathering a Disruptive Ecosystem

- A two legs strategy: Full Hybrids and EVs
- Treating EVs differently: Ampere
- Optimizing both value and volume at the same time
- Keeping Dealers at the heart of the Ecosystem

# GROWTH MONITORING

ex

apply this... move...

**THANK YOU**