



# **Keynote Speech:**

## **Weathering Disruption in the Automotive Ecosystem**

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# Disruption on all fronts – Some Data Points

BYD  
overtaking  
Tesla

New DE Gov.  
pondering  
EV subsidies

Increase of  
insurance  
claims costs  
by 30%

US Tariffs  
increased to  
25% (EU)

Q1/2025  
BEV increase  
in EU by  
~25%

Smallest  
yearly  
volumes  
since COVID

Aging of  
Vehicle Parc  
in Europe

Change of  
CAFÉ  
regulation

Van Mossel  
becoming  
EU retailer  
#4

BEV Used  
Car prices  
decreased  
by ~35%  
since 2022

VinFast  
leaving  
Europe in  
2025

Hybrids on  
the rise in  
2025

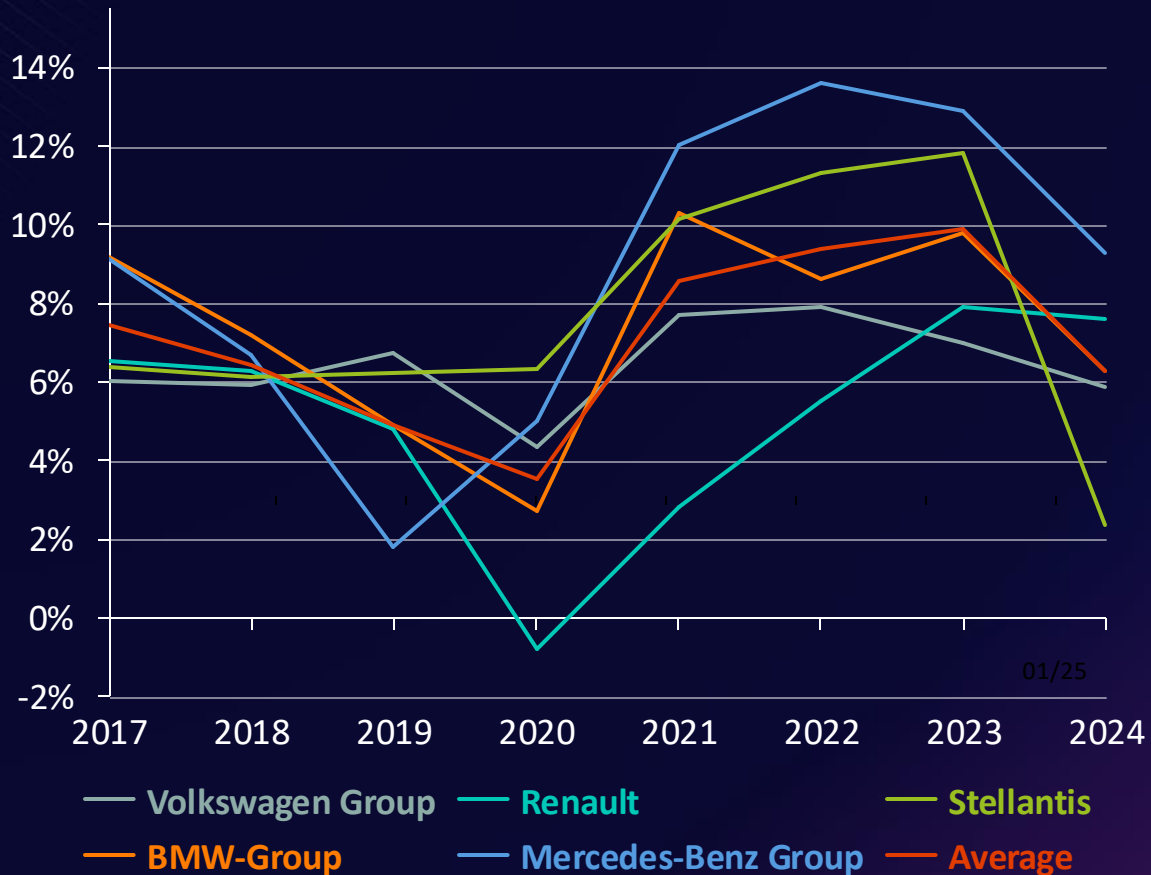
Difficult  
OEM results  
Q1/2025

2024 hottest  
year in  
record  
globally

France  
abandoning  
ZFE zones

# 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

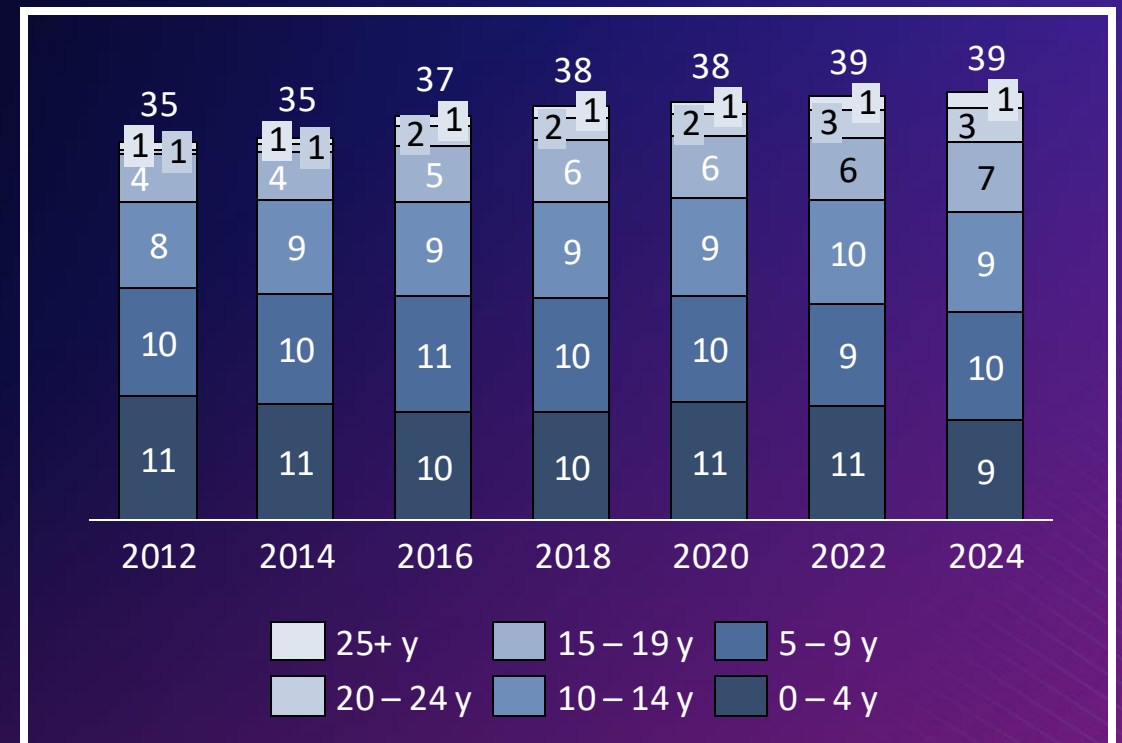
## EV hesitation persists

- 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

next



supply crisis moves...

THANK YOU