FROST & SULLIVAN

CLEPA
European Association of Automotive Suppliers

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COVID-19: Identify Growth Opportunities Across Automotive and Automotive Industry Verticals

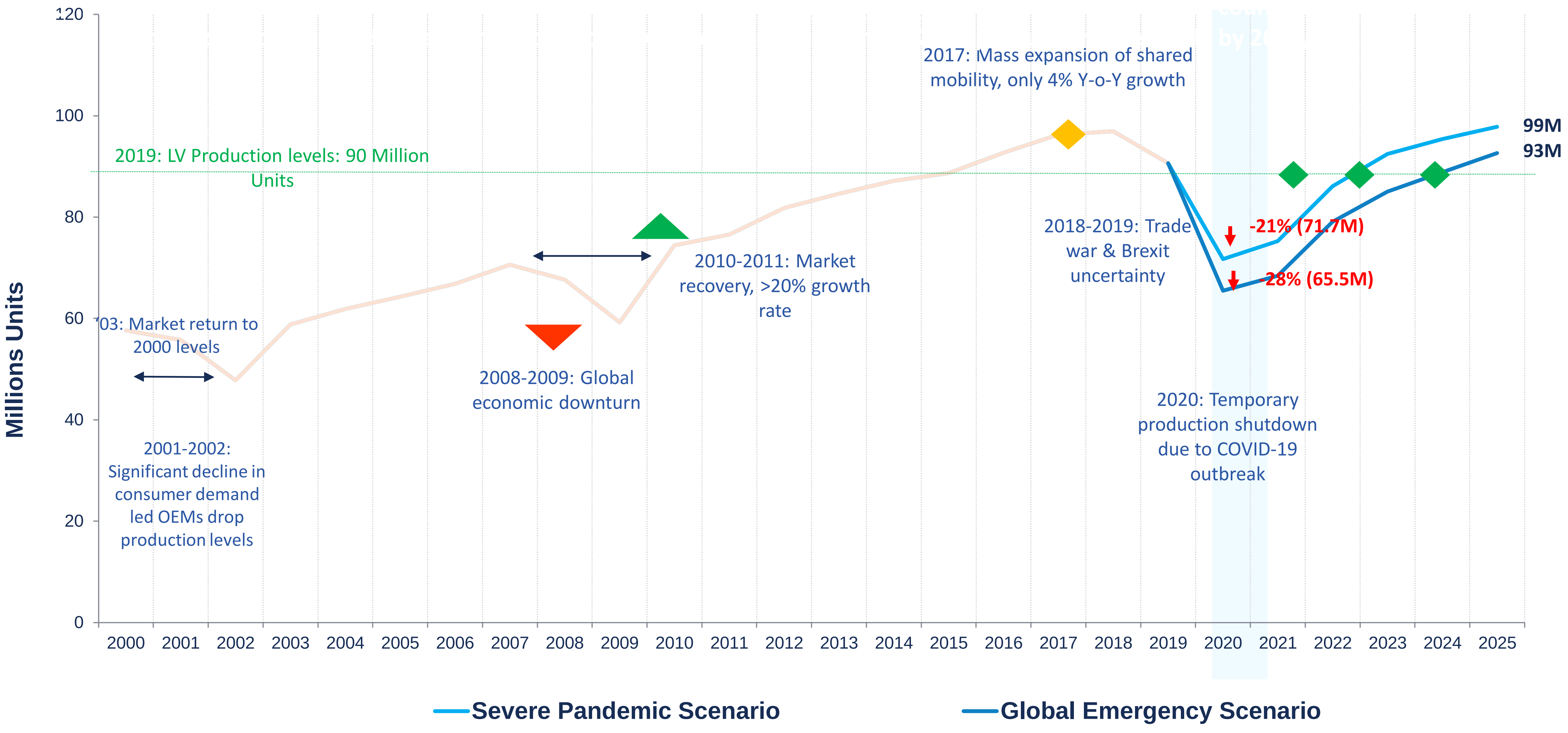
FROST & SULLIVAN TEAM TODAY

FRANCK LEVEQUE	ANUJ MONGA	CYRIL CROMIER
		
Partner & Business Unit Leader – Mobility Frost & Sullivan	**Global Research Head – Aftermarket** Frost & Sullivan	**VP Sales - Mobility** Frost & Sullivan

FOCUS POINTS

1	Changing business & economic scenario	10min
2	Automotive annual vehicle production forecast	
3	Vehicles sales, vehicle park development (incl. age and mileage)	
4	OEM mitigation plans	
5	Identifying growth opportunities across automotive industry verticals * *New/used vehicle sales digitalisation and financial services* * *Connectivity & health wellness & wellbeing* * *New mobility solutions* * *Fleet & leasing dynamics* * *Vehicle electrification*	10min
6	Impact and opportunities in the Automotive Aftermarket * *F&S scenarios for the global aftermarket* * *Impact on key product lines* * *Post COVID key trends* * *Health, wellness & wellbeing products in the Aftermarket* * *2020 outlook by region* * *Growth opportunities*	12min
7	COVID-19 Impact on urbanisation	8min
8	Strategic considerations	
9	How F&S can help you?	
10	**Open Discussion**	**20min**

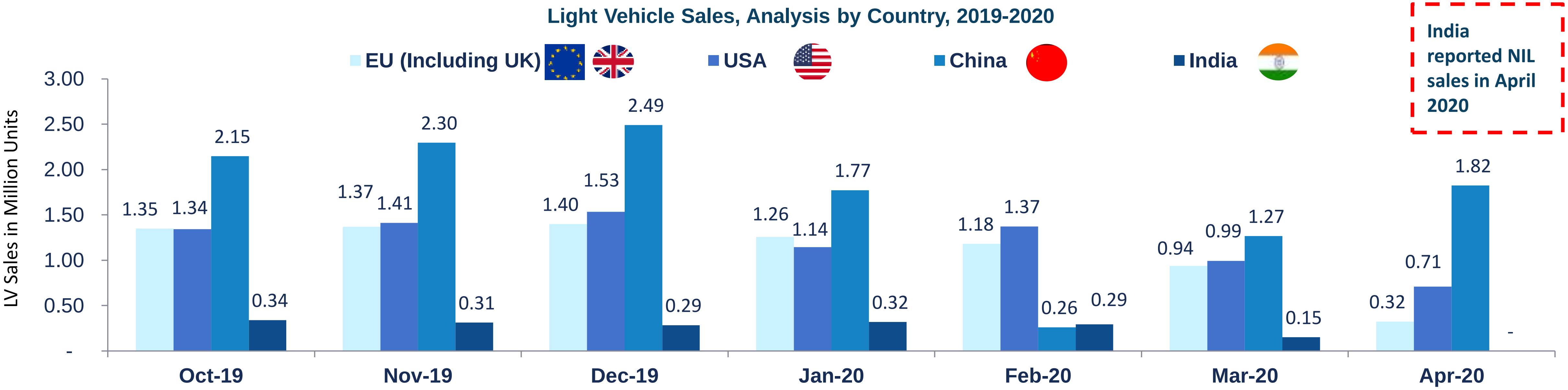
ANNUAL LIGHT VEHICLE PRODUCTION GLOBAL TO DECLINE BY ABOUT 21%



Note: Light Vehicles include Passenger Vehicles and Light Commercial Vehicles with GVWR of up to 6 MT

LIGHT VEHICLE SALES IN KEY COUNTRIES – OCT 2019 TO APRIL 2020

EU car registrations saw their worst drop in April as most dealerships were closed amid strict lockdown measures. Southern Europe was hit the hardest with Italy car registrations down by 97.6%, Spain by 96.5% as both countries struggled with the highest levels of COVID-19 cases in Europe.



SPAIN

- Some factories resume production.
- NSC: workforce temp lay-off

ITALY

- Some factories restart; NSC: cash for retailers
- Active service area; daily sanitization of all areas

FRANCE

- Part time work at Renault, Nissan, PSA.
- Showrooms closed, Maintenance service active

UK

- Most OEM/NSC product teams operating as BAU.
- 50% of dealers equipped to support online sales.

GERMANY

- Some OEMs resumes production.
- Dealerships have been allowed to reopen.

USA

- Many OEMs including Big 3 resume production. Online sales channels activated.

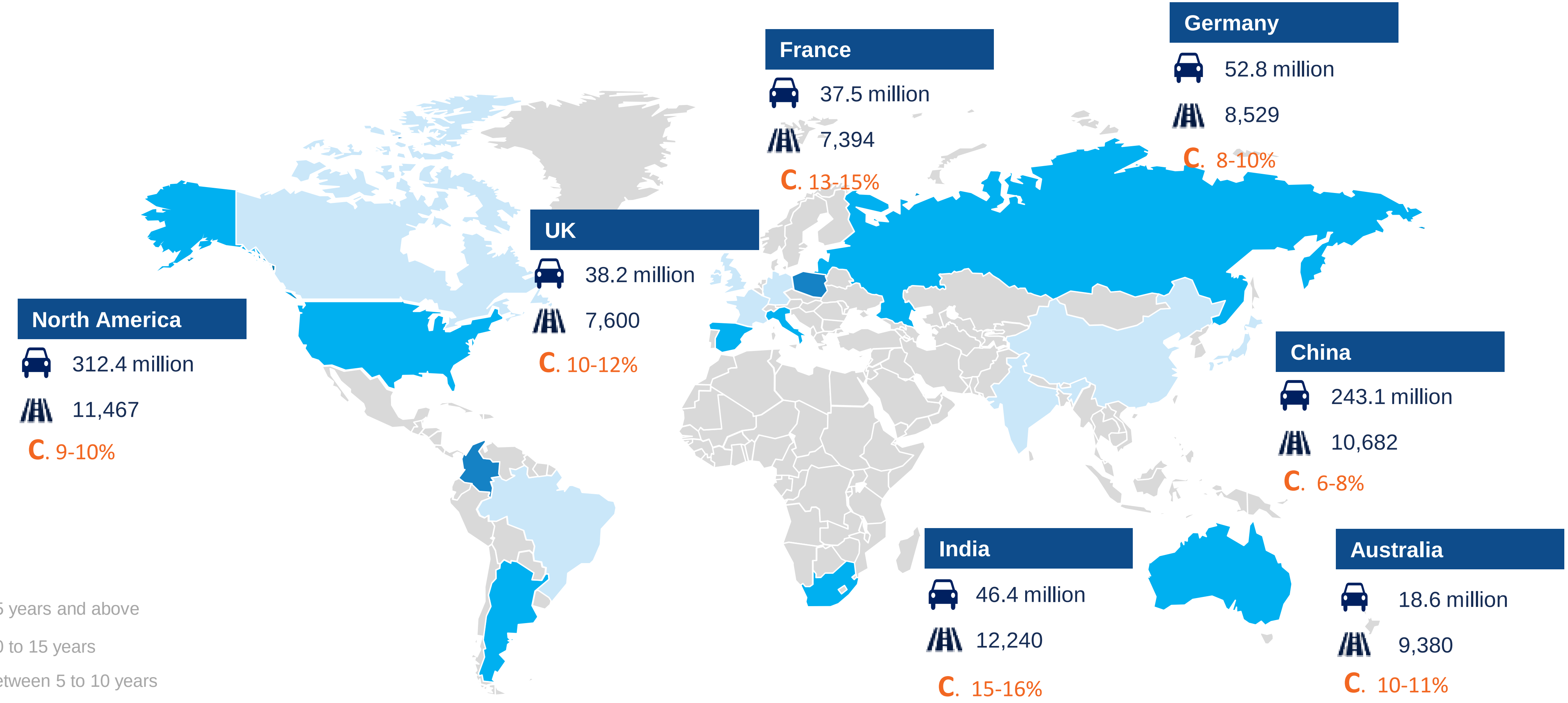
CHINA

- Production has resumed.
- The country is providing cash to car buyers to boost sales.

Note: Light Vehicles include Passenger Vehicles and Light Commercial Vehicles with GVWR of up to 6 MT

Source: Frost & Sullivan

AGEING OF EXISTING VEHICLE WILL CUSHION SOME OF THE BLOW FROM REDUCED ANNUAL MILEAGE ACROSS MOST MARKETS



Age 15 years and above

Age 10 to 15 years

Age between 5 to 10 years

2020 Vehicle in Operation (est.)

Average Annual Miles Travelled (2019)

C. COVID Mileage Decrease

Note: Arrows represent mileage trends Pre-COVID. All figures are rounded. The base year is 2019. Source: Frost & Sullivan

OEMS MITIGATION STRATEGY TO COVID : OEMS WORKING TOWARDS REDESIGNING/ REVISITING SUPPLIER SOURCING, PRODUCT DEVELOPMENT AND DELAYING LAUNCHES

Production

- Freeze smaller batch lines
- Outsource some production
- White labelling /Licensing Platform
- Joint component sourcing & pooling
- 'GLocal' supply chain strategies
- Strategic use of 3D printing
- Automation interest rises

Product and R&D

- Reduced Variants / Trims
- Shift to low-spec vehicles
- Delayed new product launches
- Engineering insourcing
- Delay Autonomous L4 development
- Car as a Vehicle of Health (HWW) services
- Digital platforms and in-car connectivity

Sales

- Virtual showrooms & Online customer journey
- Attractive credit & financing options
- Drive UC 'Certified Programs'
- Distinctive customer management systems.
- Pay freeze/ redundancy, gig economy workers.
- New remote working technologies

Corporate

- Exceptional employee care protocols
- Draw extended credit lines.
- Target Vulnerable Co.'s (M&A)

Areas of investment

IMPACT OF COVID-19 OUTBREAK – MORTALITY MATRIX OF THE AUTOMOTIVE INDUSTRY

Future prospects cover the spectrum from collapse and sharp declines to high and, in some cases, exponential growth

COVID-19 Growth Impact Assessment for the Automotive Industry: Mortality Matrix Of the Automotive Industry

Revenue Growth / Decline (High Decline → High Growth); Degree of Impact by COVID (Low → High)

	Low	High
High Decline	**Endangered Verticals** → Car Sharing → Bike Sharing → Ride Hailing → ICEs	**Moribund Verticals** → Mobility as a Service (MaaS)* → Car Pooling
High Growth	**Immortal Verticals** →Electric Vehicles → Connectivity – eCall → LCV Leasing → Used Car Sales → Short-term Lease - Vehicle Subscription	**Nirvana Verticals** → Digital Retailing → On-demand Service Models → Feature on Demand (FOD) → Contactless Delivery → Health, Wellness & Wellbeing (HWW) → Aftermarket Hygiene related Accessories

Definition:

- **Moribund :** Technologies/Business Models that will decline by nearly 50% because of COVID; perhaps post a late and slow recovery
- **Endangered**: Technologies/Business Models that will see sharp 20 to 30%+ decline during and post Covid will see slow recovery
- **Immortal**: Resilient Technologies/Business Models that will see low impact and high revenue growth post COVID
- **Nirvana** : Technologies/Business Models that will see exponential growth during COVID and continue to sustain growth post-COVID

Note: *Mobility as a Service to see low interest in the short-term, but will slowly recover in Q4

Source: Frost & Sullivan

COVID 19 – DIGITISATION CATALYST FOR AUTOMOTIVE RETAIL AND AFTERSALES

Until recently, most OEMs and dealers viewed digitisation as a 'Plan B', a 'Nice to Have'. As of April 2020 it is the ticket to survival, creating new dimensions of customer engagement

Inspire | **Choose/ Configure** | **Purchase** | **Service/ Aftersales**

Online Entry

"Tesla Way"

Digital Marketing & Social Media - Data Driven Targeted Advertising

Interactive Websites, Web 3D Configurator, Finance Simulator, Virtual Store, Scheduling Test Drive, Virtual Assistance/Chatbots

Online Finance, Insurance and Vehicle Purchase/ Delivery @ Doorstep

Over the Air Updates, Digital Vehicle Assistance, Prognostic Tools, In-Vehicle Parts and Service Purchase Options, etc

"Audi City Way"

Smart Store: Digital Engagement Power Wall, Tablets, Simulators, VR Test Drive, etc

Product Genius, Financial Advisor, Virtual Assistants

Customer ID, Gamification, Robots, AI, AR/VR

Online

Purchase Options

Instore

80% to 100% drop in physical visits to showrooms creates the "Out of the Box Way" – Empowering Dealers with Digital Tools

Digital support: Video/Voice with dealer/sales associate (Telephone, Zoom, Whatsapp, Facetime, etc): personalised video walkthrough, vehicle valuation via video, over the phone financial consultation, etc

Dealership visit: 30 minutes personalised shopping slot, extended business hours, distancing, new safety protocols (new gloves, pens, sanitized room, sanitized vehicle)

Mobile vehicle servicing, auto care concierge services, online collection & delivery booking option, DIY eCommerce & DIFM eCommerce for parts and service, servicing packages for 5 years & older vehicles

ONLINE USED VEHICLE RETAIL: ECOMMERCE MARKETPLACE PLATFORMS

With a broader reach than any other traditional channel, used car marketplaces are emerging as high potential business models

	Basic C2C, B2C Marketplace	Traditional Bricks & Clicks Marketplace	Broker Marketplace	Online car retailer	Aggregators	Big boys arena
	Platform connecting sellers & buyers	Platform of UC/NC dealers, leasing companies, car rental companies, OEM UC programme	Platform to support UC sales of retail customers	Online UC sales platform	Connecting B2B and B2C dealers & wholesaler	Traditional b2c marketplace
Physical store	⊘	✓	⊘	✓	⊘	⊘
Stocking facility	⊘	✓	⊘	✓	⊘	⊘
Direct purchase of UC	⊘	✓	⊘	✓	⊘	⊘
Sale OR listing of UC	UC Listing	UC Sale	UC Listing	UC Sale	UC Listing	UC Listing
Revenue source	Subscription	resale margin from UC sales + Commission from value add	Commission from UC sale & value adds	resale margin from UC sales + Commission from value add	Subscription	UC Sale/ Subscription
Avg. vehicle age	All age group	Majority young	Majority young	Majority young	All age group	All age group
Photo quality	Customer/ dealer photo	High quality with background	Photoshop / High quality photo	High quality with background	High quality with background	Customer/ dealer photo
Business segment	C2C and B2C	B2B and B2C	C2C	B2C, C2C	B2B, B2C	C2C, B2C
	OTOMOTO, mobile.de	PAPPAS, CarNext, AAA AUTO, Das WeltAuto	abracar, CARIZY, karosso, KYUMP	onlinecars.at, InstaMotion, brumbrum	wirkaufendeinauto, CarGurus, cars.cz	ebay MOTORS, amazon vehicles, Alibaba.com

Note: these are Frost & Sullivan classifications

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DIGITIZING THE VEHICLE PARTS AND SERVICE BUSINESS

Worldwide aftersales revenues are expected to grow from about 29Bn to 78Bn by 2025. Growth is driven primarily by increased online sales of parts & accessories and innovative servicing business models

How it Works?

Locate Service Shops

Get Real-Time Quotes

Book and Pay Online

Key Players in this Space

autobutler

AUTO SCOUT24

MyCarNeedsA.com

WhoCanFixMyCar.com

iDGARAGES.com

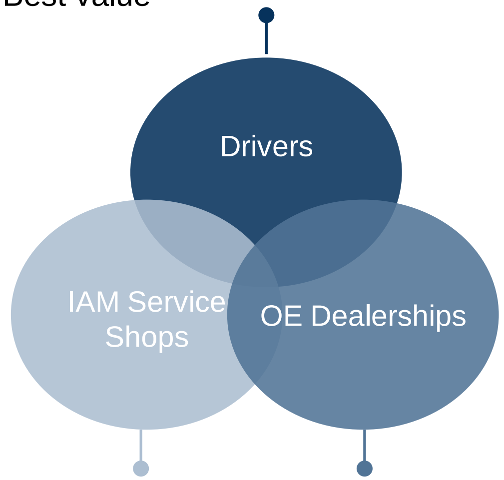
caroobi

FAIRGARAGE – DER KFZ-SERVICE-MARKTPLATZ IM INTERNET

monmecanicien.fr

Benefits

- Ease of service access
- Increased transparency
- Best value



IAM Service Shops:

- Increased competitiveness
- Customer access
- Digital presence, Lead management
- Brand trust

OE Dealerships:

- Access to out-of warranty/IAM customers
- Brand trust & transparency

GROWTH OPPORTUNITIES IN CONNECTIVITY — PAY-AS-YOU-GO FEATURES WILL START SEEING HIGHER POTENTIAL, POST COVID

Connected Services to be Used as a 'Marketing Tool' to Boost Vehicle Sales – Opportunity to Connect more with Customers

Need for 'Biometrics and Associated services' (Eg: Health Wellness and Wellbeing Services)

Need-based 'Feature-on-Demand (FoD)' Services to Take off – Activate/Pay Only When Used

‘HEALTH, WELLNESS, & WELL BEING’ IN CAR CAN BE DEFINED AS A MYRIAD OF HEALTHCARE SOLUTIONS AND WELLNESS FEATURES FOR DRIVERS AND PASSENGERS

GEELY

Latest SUV, Icon, has unique filtration system

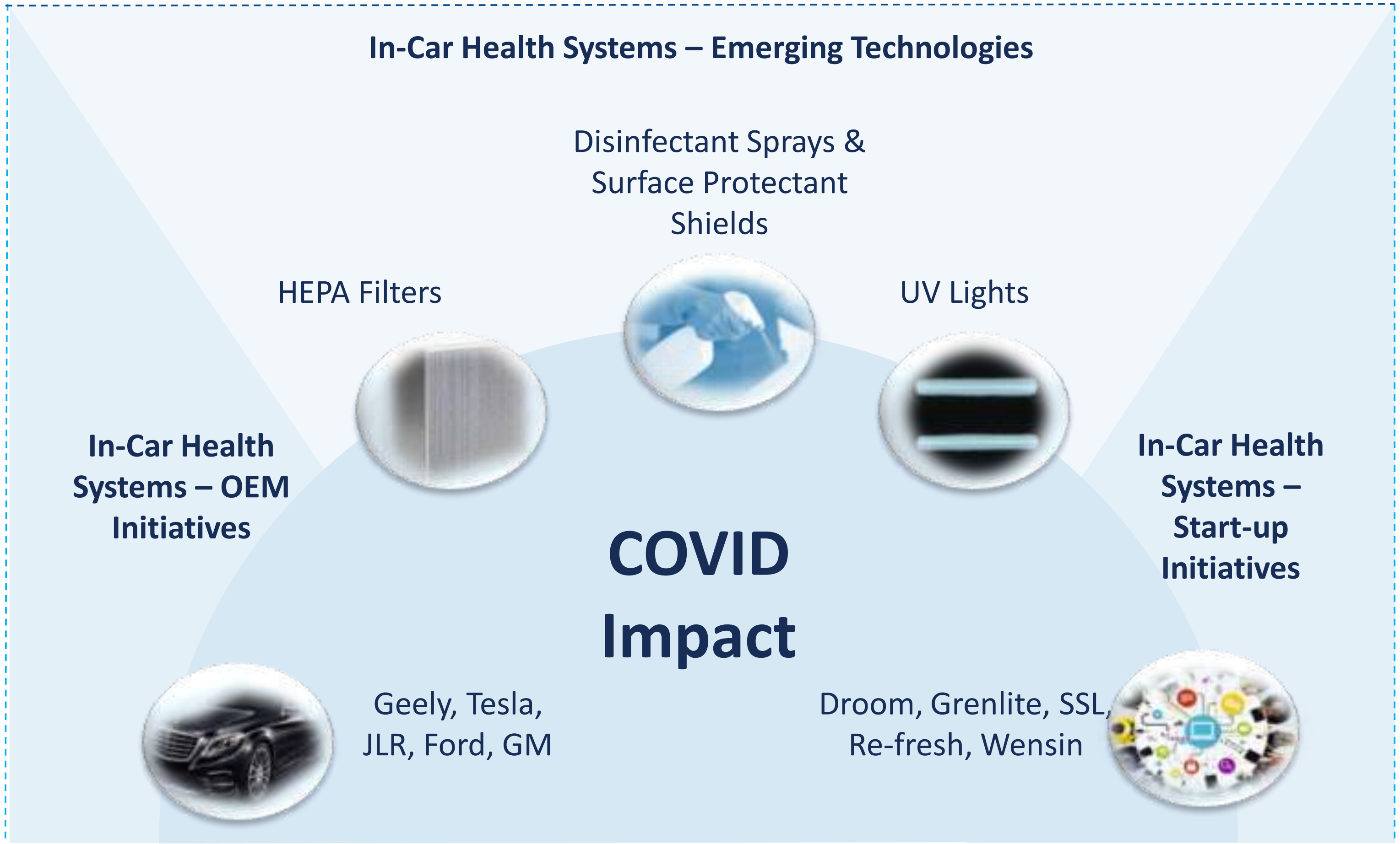
Purifies air & contain viruses

Launched exclusively for China

TESLA

Bioweapon Defense Mode

The HEPA filter is claimed to be 100x superior to other automotive filters



GHSP

GHSP’s new brand: Grenlite

Smart and programmable UV-C products

Automatically treats viruses & bacteria

droom

Droom Health Initiative

Offers antibacterial and antiviral surface protectants for vehicles

GROWTH OPPORTUNITIES IN VEHICLE LEASING & RENTAL — PRODUCT FLEXIBILITY, USED CARS AND LCVS TO BRING MORE BUSINESS THAN TRADITIONAL LEASING PRODUCTS

Increased Demand for Contract Flexibility – ‘Vehicle Subscription’

Greater Uptake of LCV Leasing to ‘Support Deliveries’

Growth in ‘Used Car’ Leasing

EUROPEAN FLEET MARKET – EV LEASING ANALYSIS

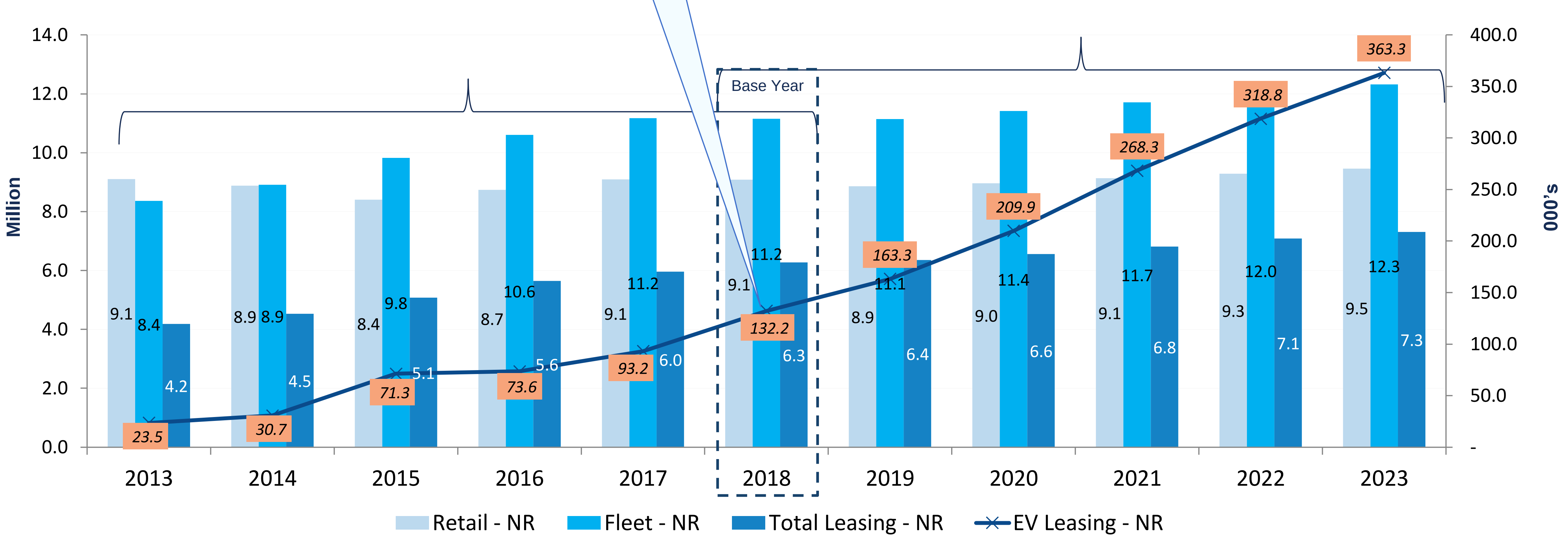
Reliability in technology, availability of brand options and affordable pricing to drive PHEV demand for next 5 years

Evolution: CAGR (2013 to 2018)
Retail – (0.1%)
Fleet – 5.9%
Total Lease – 8.4%
EV Lease – 41.2%

BEV:	PHEV:
46.6%	53.4%

Out of total 132.2K EVs leased we estimate BEV – 61.6K, PHEV, 70.6K

Forecast: CAGR (2018 to 2023)
Retail – 0.8%
Fleet – 2.0%
Lease – 3.1%
EV Lease – 22.4%



Note:
- 1. COVID-19 impacts not considered
- 2. Electric Vehicle (EV) includes sum of both Battery Electric Vehicles (BEVs), and Plug in Hybrid Electric Vehicles (PHEVs)
- 3. EV leasing does not include B2C business
- 4. Data represents sum of EU19: Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Italy, Luxembourg, Netherlands, Norway, Poland, Slovakia,
- Spain, Sweden, Switzerland, Turkey, Ukraine, UK

Source: Frost & Sullivan

GROWTH OPPORTUNITIES IN SHARED MOBILITY — SINGLE OCCUPANCY SHARED MOBILITY TO BOUNCE BACK STRONGER THAN OTHER SHARED MOBILITY MARKETS

‘Bike Sharing’ to Increase in the Short-term

Fleets to be ‘Repurposed for Doorstep Delivery of Essential Goods’

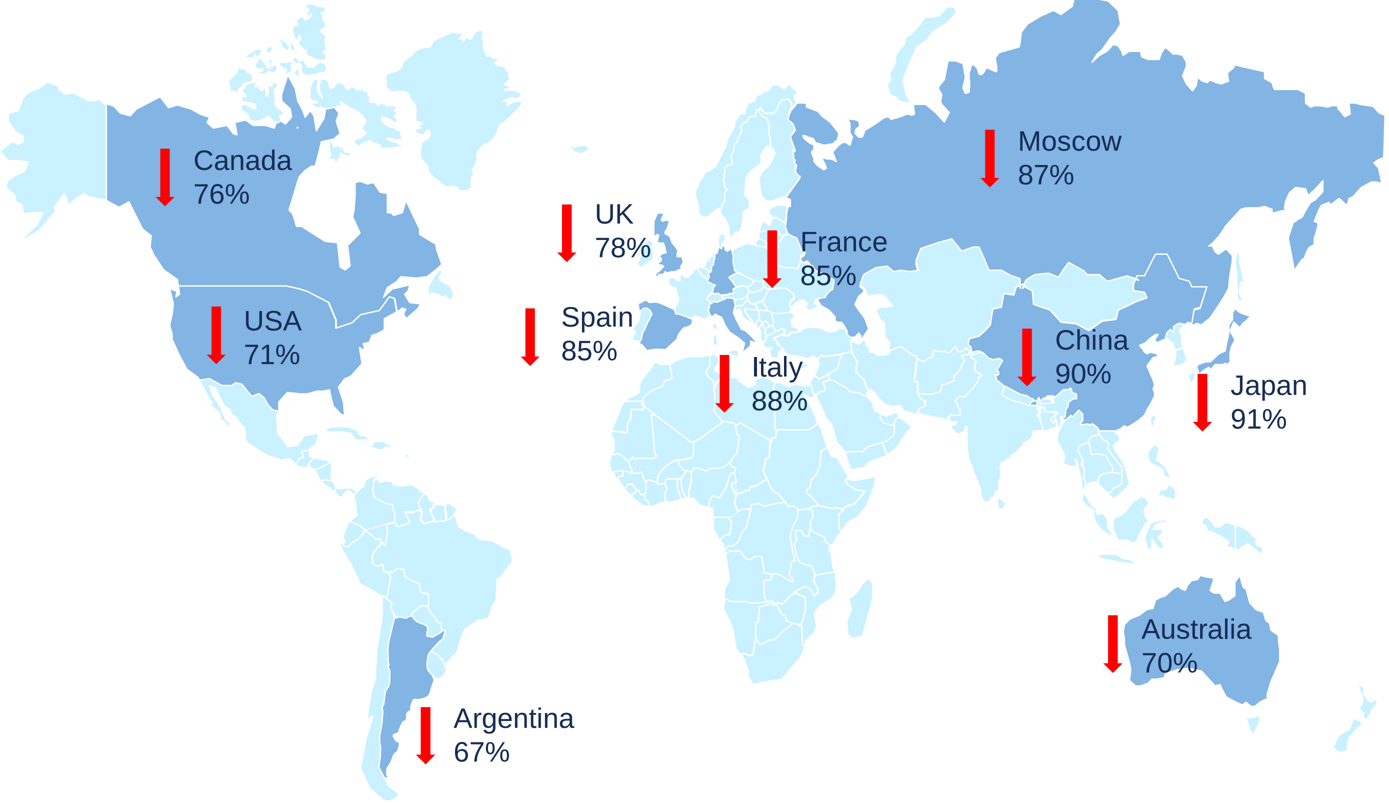
‘Single Occupancy Mobility Modes’ to Make Rapid Recovery

Evolution from Single Shared Mobility Apps to Mega Apps - Continue to ‘Diversify Service Offerings’

COVID-19 TO REDESIGN URBAN MOBILITY IN CITIES – FEAR OF THE CONTAGION PUSHING PEOPLE AWAY FROM PUBLIC TRANSPORT TOWARDS PRIVATE CAR USAGE

Public Transit Usage , Global, April 2020

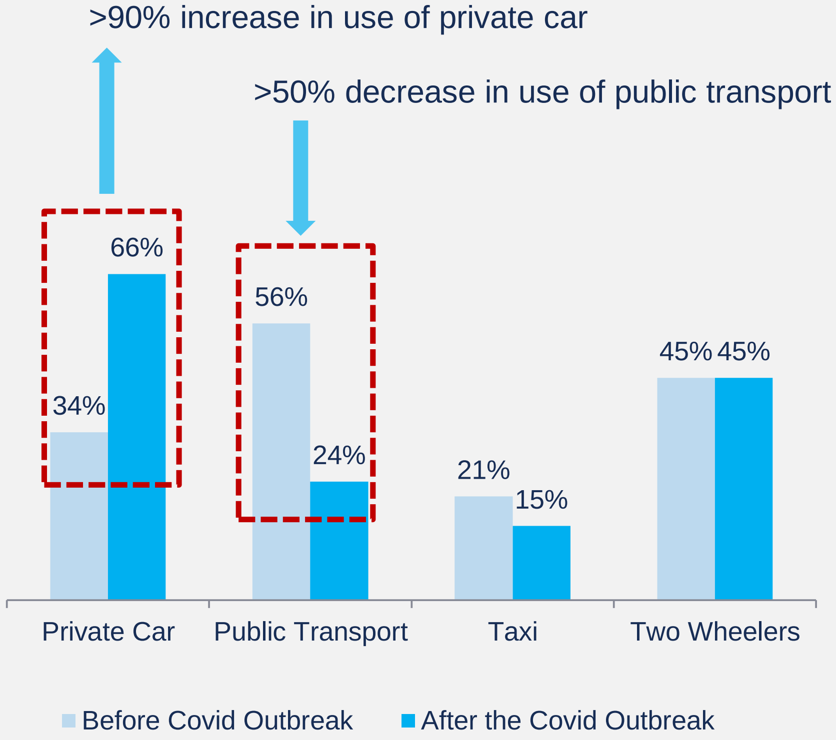
Restricted travel, Work from home policies, fear of crowded spots and social distancing norms has resulted in a decrease of over 80% in public transport usage globally



People deem personal vehicles to be more safe than public transport; they are also likely to to avoid multiple occupancy shared mobility modes like Ridehailing, Ridesharing

***Car Sales** in China had dropped to **96%** during the crisis. However its **gradually improving**, with the drop moderated to **40%** in the third week of March*

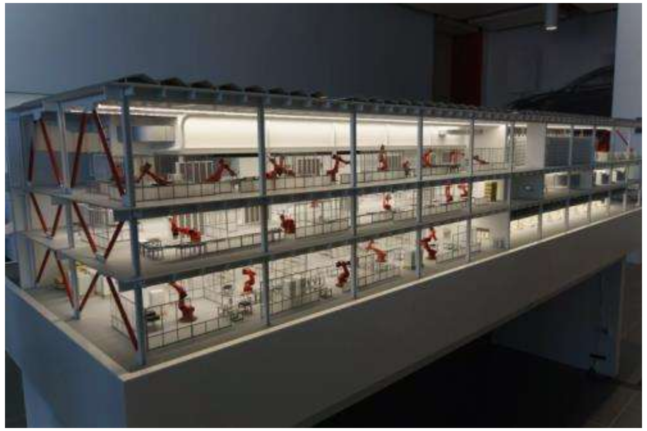
Usage of various travel mode pre and post Covid Outbreak, China



GROWTH OPPORTUNITIES IN ELECTRIC VEHICLES — ELECTRIC VEHICLE SALES WILL NOT BE IMMUNE FROM THE PANDEMIC- HOWEVER PROVIDES MORE ATTRACTIVE GROWTH OPPORTUNITIES VS ICE

Acceleration of New OEM Co-operation Models
Joint Manufacturing, Licensing of skateboard platforms

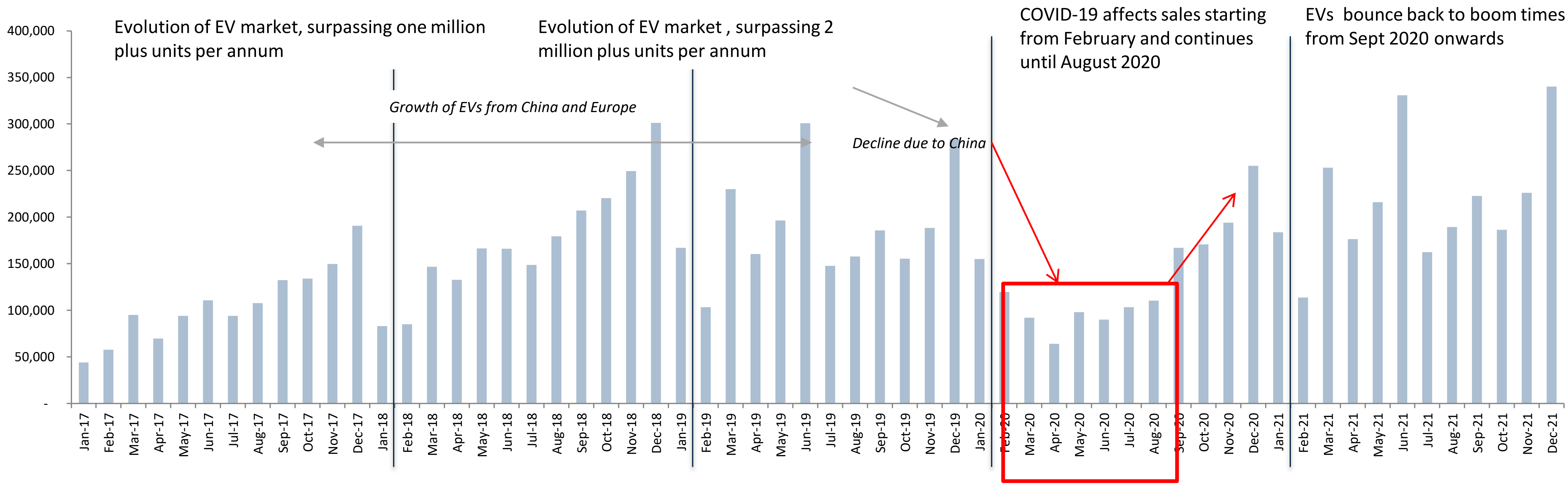
Incubator Strategy
One Gigafactory for multiple Battery Suppliers



Opportunity With 'Broader EV Ecosystem Products'
Charging Stations, Home Energy Products

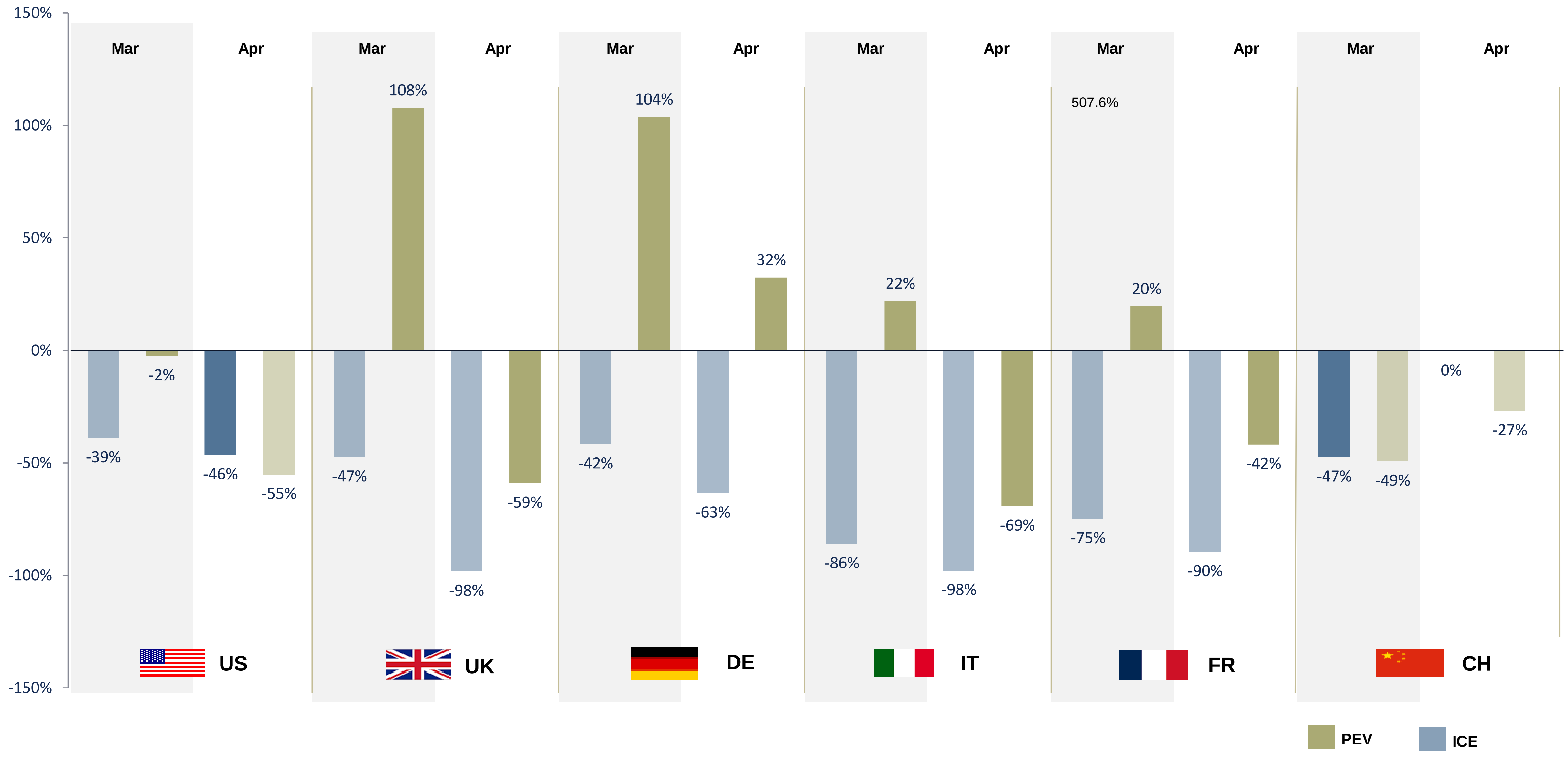
DESPITE AN IMPACT ON ELECTRIC VEHICLE SALES IN THE SHORT-TERM, RECOVERY IS LIKELY TO BE SWIFT DUE TO MORE LOCALIZATION OF FUTURE SUPPLY CHAIN

Impact of COVID-19 : Electric Vehicle Sales by Month, Global, 2017-2021 (estimated)



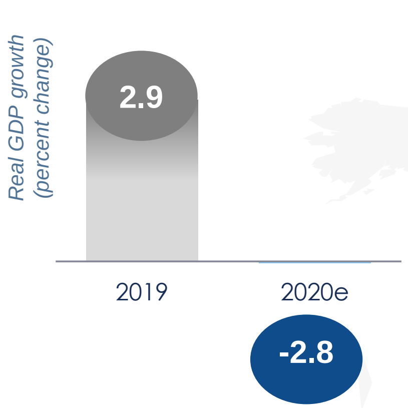
	Models	Charging Stations	Battery Cell Production	EV Estimated Sales
2020 Est. (without COVID Impact)	35	500,000+	108,000 MWH	~2.5 Million
2020 Est. (with COVID Impact)	28	470,000+	100,000 MWH	~2.3 Million
IMPACT	MEDIUM	LOW	LOW	LOW

APRIL 2020: EV ROBUSTNESS CONTINUES



2020 IN NUMBERS — KEY PREDICTIONS

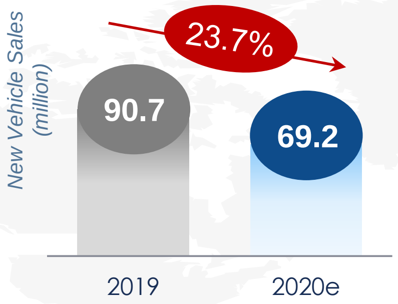
1 GDP



Downturn in consumer demand and industrial production will push global economy into possible **recession**

Leaders: India, China
Laggards: Rest of World

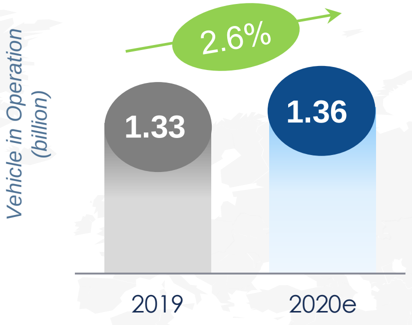
2 Car Sales



Significant sales decline is expected in 2020. **China will still account for more than 1/4th** of the overall sales.

Leaders: China, US, Japan, India
Laggards: Italy, Latin America

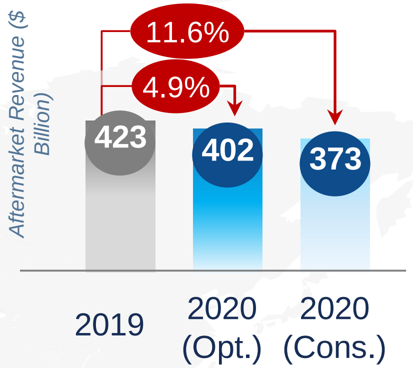
3 VIO



Vehicle parc will grow in 2020, but the **rate of increase will be much slower** as all major markets will see decline in sales

Leaders: China, India, Japan
Laggards: Italy, Spain, US, Latin America

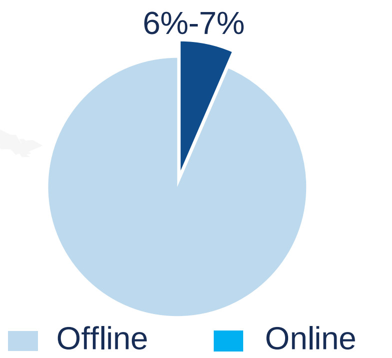
4 Parts $



Reduced average annual mileage under lockdown and hindered customer affordability will adversely impact the aftermarket demand

Leaders: None
Laggards: Global

5 Online $



Adoption of digital channels will pick up hurriedly in parts and accessories retail, expanding by 17% in 2020

Leaders: US, China, India, Germany
Laggards: Africa, LATAM

Source: IMF; World Bank; Frost & Sullivan

2020 IN NUMBERS — KEY HIGHLIGHTS

1 On-demand Services on the Rise

Adoption of on-demand repair services to be fuelled by fear of contamination at workshops, thereby need for contactless options

Hotspots: China, US, Western Europe

2 Consolidation throughout the Value Chain

Under severe stress from financial challenges, **small to medium sized channel participants** (suppliers/resellers/service providers) **will be acquired or merge** with bigger entities

Hotspots: Global

3 OES to Double down on Aftersales Connect

Dwindling new vehicle sales and idle manufacturing lines, OES channel is expected to **proliferate the aftermarket with competitive offerings**

Hotspots: China, US, Western Europe, India

4 New Aftermarket Business Opportunities

Relatively upbeat EV sales and expansion in related parc will create opportunities for **battery refurbishment,** while newer demand pockets to rise from **hygiene and sanitization needs**

Hotspots: US, Germany, Spain, Italy, China

5 ADAS and related service as growth driver

Increasing penetration of ADAS vehicles in global VIO - **particularly in Europe and NA - will create growth** in service categories such as **sensor recalibration**

Hotspots: US, Western Europe, China
Laggards: India, Africa, Latin America

Source: Frost & Sullivan

GLOBAL AFTERMARKET REVENUE MARKET SIZE POTENTIAL

Tires, maintenance related parts and accessories will be the worst hit categories in the replacement aftermarket

		Optimistic Scenario- U Shaped Recovery		Conservative Scenario- L Shaped Recovery	
	2019 Revenue ($ Billion)	2020 Revenue ($ Billion)	Growth Rate (2019-2020)	2020 Revenue ($ Billion)	Growth Rate (2019-2020)
Tires	$90.7	$84.4	(6.9%)	$78.4	(13.6%)
Batteries	$17.2	$16.6	(3.0%)	$15.5	(9.7%)
Brake Parts	$26.4	$25.2	(4.5%)	$23.4	(11.4%)
Filters	$12.6	$12.1	(3.5%)	$11.3	(9.7%)
Collision Body Parts	$39.8	$38.4	(3.4%)	$36.4	(8.5%)
Starters and Alternators	$8.7	$8.3	(4.5%)	$7.7	(11.4%)
Lighting	$7.2	$6.8	(4.7%)	$6.3	(12.0%)
Exhaust Components	$9.9	$9.6	(3.0%)	$8.9	(10.5%)
Spark Plugs	$3.3	$3.1	(5.0%)	$2.9	(11.9%)
Others*	$206.9	$196.9	(4.6%)	$182.5	(11.6%)
Total	**$422.5**	**$401.7**	**(4.9%)**	**$373.4**	**(11.6%)**

Growth Neutral Decline

Low High

*Others include steering system hard parts, Remanufactured engine and transmission, remanufactured rack and pinion steering gear, Heating Ventilation and Air Conditioning (HVAC) and engine cooling components, light vehicle exhaust emission control systems, fuel-delivery systems, engine control units, ignition parts, automotive sensors, ignition wire sets, fuel pumps, selected automotive remanufactured pumps, sports compact under hood components, belt, hoses, gaskets and seals, battery, carburetor, gauge, and internal engine hard parts.

Note: All figures are rounded. The base year is 2019

For more information on scenario considerations, click here.

Source: Frost & Sullivan

HEALTH WELLNESS AND WELL-BEING PRODUCTS FOR IAM

Mann+Hummell: Cabin Air Filter

Purpose: Filtered air flow inside the vehicle cabin

Benefits: FreciousPlus line of cabin air filters blocks PM2.5 particles and also blocks harmful gases and unpleasant smells from entering inside the cabin

Opportunity Market: Among the fastest growing filtration category product in the aftermarket and can find quicker adoption both OE installations and IAM

WAIglobal: Vehicle Disinfectant Kit

Purpose: Comprehensive Vehicle Disinfection Solution

Benefits: Serves vehicle sanitization needs- particularly useful for shared mobility related applications and vehicles associated with fleets

Opportunity Market: Used Cars, Shared Mobility, Public vehicles etc.

Magneti Marelli: Ozone Generator

Purpose: Vehicle/Workshop disinfection Solution

Benefits: No consumables involved as compared to other methods involving sanitizers

Opportunity Market: Possible applications beyond automotive also include- Domestic use

Note: Existing product rebranding

Roberlo: Sanius Workshop Sanitizer

Purpose: Surface disinfectant for use in workshops- launched by Roberlo (company specializing in coating and refinish aftermarket products)

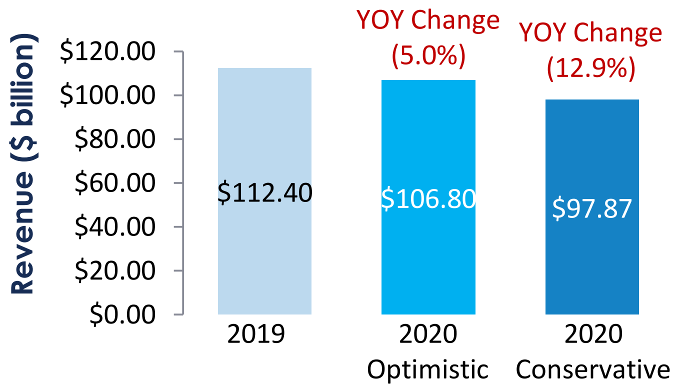
Benefits: Handy solution for workplace safety and hygiene- particularly to address customer fears around contamination

Opportunity Market: Workshops, salvage yards etc.

Source: Frost & Sullivan analysis

2020 AFTERMARKET OUTLOOK– EUROPE

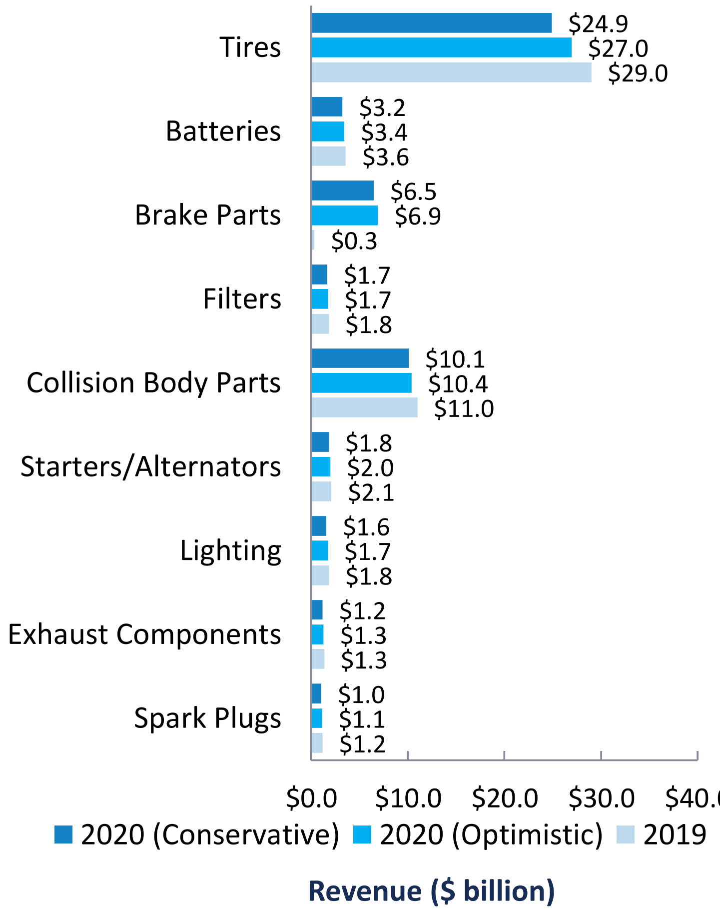
Severe pandemic implications will change both vehicle ownership and travel behavior for vehicle owners, thereby altering the entire mobility landscape in Europe



VIO
(Million Units)
2019: 343.0
2020e: 349.8

2020 Aftermarket Outlook	
1	Western Europe has been more exposed to impact of Corona Virus and will also thereby see the severe impact on aftermarket demand
2	Supply chain alteration- with shifts in production bases to Eastern Europe for more manageable logistics could also happen
3	Other possible shifts include heightened use of e-mobility options like bikes, e-scooters for short-mile while at the same time cross-country travel could see more use of personal vehicles in the long run

Note: Only selected part categories represented in the chart and it is therefore not reflective of overall revenues



Source: Frost & Sullivan analysis

CHINESE AFTERMARKET REVIVAL IN MOTION

From new product innovation to targeted program offerings, industry participants are pulling out all shots to leverage aftermarket opportunity in hand

Ssangyong Motors (South Korea)

Customer Safety Clinic launched at all dealer locations, offering free sanitization and discounted maintenance related services

Tuhu (China)

- Post re-opening of Wuhan, Tuhu- the online parts seller launched a **Wuhan Only Promotion** offer *providing free disinfection, and battery services till end of April 2020*
- Also includes discounted offers on replacement tires and maintenance packages.

Geely Motors (China)

New SUV 'ICON' launched with **cabin air filtration capabilities** comparable to N95 mask

Hyundai & KIA (South Korea)

- Both OEMs are offering financial aid of $1.8 million to repair and maintenance service network affiliations- Bluehands (Hyundai) and Auto Q (KIA)
- Phased approach- complete relaxation in affiliation fee in first month, and then a discounted fee in following months

Source: Company Websites

KEY TRENDS & OPPORTUNITIES EMERGING IN AFTERMARKET POST COVID19 ACROSS GLOBAL MARKETS

New Aftermarket demand pockets to rise from the need of customer safety and well being

'Contactless Delivery' of Parts and Services

Market Opportunity

$75 billion

'Online Marketplace' for Booking Parts and Services

Market Opportunity

$5.7 billion

'On-demand Service Models' to Surge - Demand for Mobile Mechanics and Parts (Eg: Tire, Battery, Fuel)

Market Opportunity

$3.0 billion

Demand for 'Hygiene, Car Care Market' - improved Cabin filters, Vehicle Sanitization and others

Market Opportunity

$2.2 billion

Note: Market Opportunity refers to annual revenue opportunity in 5 years

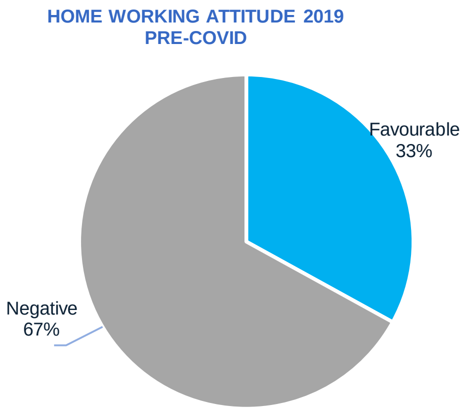
Source: Company Websites

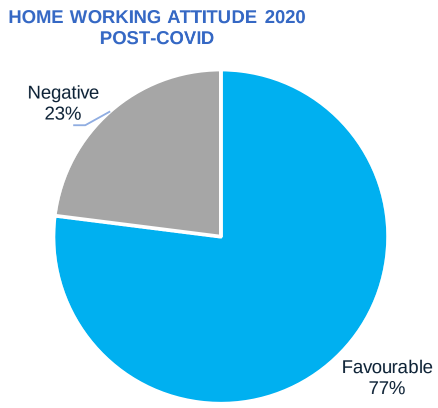
COVID-19 EXPECTED TO SIGNIFICANTLY INCREASE WORKING FROM HOME POLICIES

Together with a shift in corporate mobility policies it is likely to alter urbanisation trends and transform the mobility industry

WILLINGNESS TO WORK FROM HOME ON A GLOBAL EMPLOYEE SAMPLE

Data source: GlobalWorkplaceAnalytics.com

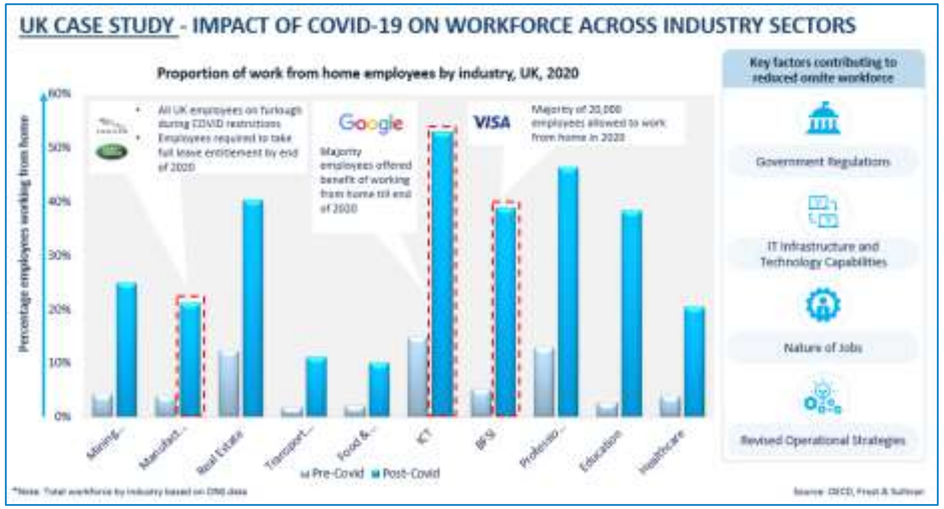




«Home office will be the norm for over 800,000 people post COViD, stating significant office cost reductions» *(HR head of PSA Group)*

«Home working has shown that productivity can be achieved so managers are not in a hurry. The plans we are preparing reduce office capacity by 35% to 50%» (Head of property investor JLL's workplace strategy for Europe)

«People want to come back to the office – not full time, but to see each other and be part of a group and a project» *(Associate, real estate company Cushman & Wakefield)*



IMPLICATION . . .

SHIFT AWAY FROM PUBLIC TO PRIVATE

SHIFT FROM FLEET TO RETAIL

NEW V/S USED CAR

PREFERENCES IN VEHICLE TYPE *(SUV, Hatchback)*

VEHICLE TECHNOLOGIES PREFERENCES *(Powertrain)*

Growth Dialogue

Powering clients to a future shaped by growth

FOCUS ON DECISIVE ACTION, MEASURED STRATEGY ALIGNMENT AND REVISED LONG-TERM ROADMAPS

SHORT TERM

Immediate Actions

- Ensure workforce safety
- Set up quick response team (QRT)
- Draw extended credit lines & financial support mechanism to dealers & suppliers

MEDIUM TERM

Evaluate Options

- Enable complete online customer journey (cars, parts & service)
- Refocus on lower cost, higher margin models and integrate HWW solutions
- Used car business

LONG TERM

Re-Strategize

- Business Model Change through Connected Digital Vehicles
- Continue Supply Chain Diversification
- Prepare contingency plan, *eg Mobility pattern changes*

HOW CAN OUR TEAM HELP YOU?

FutureCasting	• Call for action to CEOs to Respond, Reset and Rebound. To support in RE-PLANNING, RE-FORCASTING & Future proofing
Cars As Vehicles Of Health	• Robust data-backed recommendations on the ideal use cases, packages and pricing to follow for implementation of Health Wellness & Wellbeing features in the Car
Market Due Diligence of Used Car Market	• Evaluate the opportunities in used car market including potential for used electric cars, online sales of used cars, used car leasing and other KPIs of the sector
EV Sales Tracker	• Monthly thought leadership analysis of Global EV models sales by key markets and OEMs
Cell & Battery Manufacturing Feasibility Analysis	• To develop a winning strategy in cell and battery manufacturing business with help of robust and actionable insights
COVID Regulator Tracker	• Bi-Weekly global monitor of Governmental policies at country level to support Automotive Industry players to re-shape strategy and rebound from COVID crisis.,

FOR ADDITIONAL INFORMATION

Franck Leveque

Partner - Business Unit Leader - Mobility Group [Europe]

P: +49 69 77 03 321

M: +49 15 12 76 70 824

franck.leveque@frost.com