

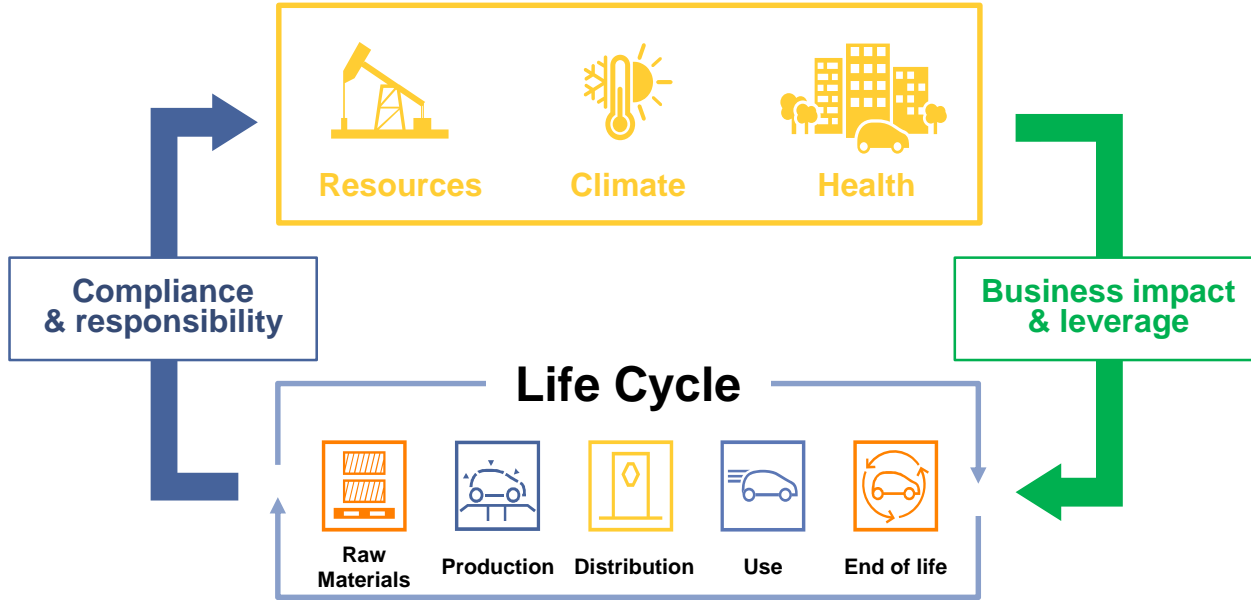
2017-2022 MTP & ENVIRONMENT

FROM ENVIRONMENTAL CHALLENGES TO COMPETITIVENESS LEVERS

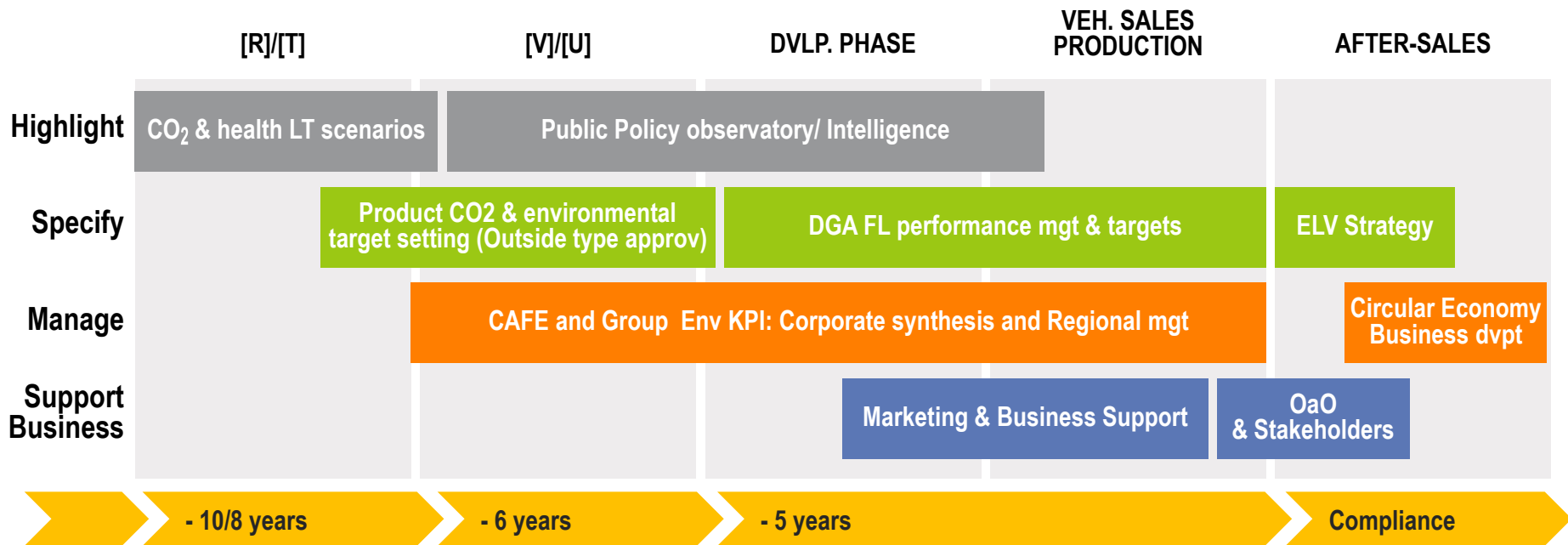
RENAULT STRATEGIC ENVIRONMENTAL PLANNING
30 MARCH 2018



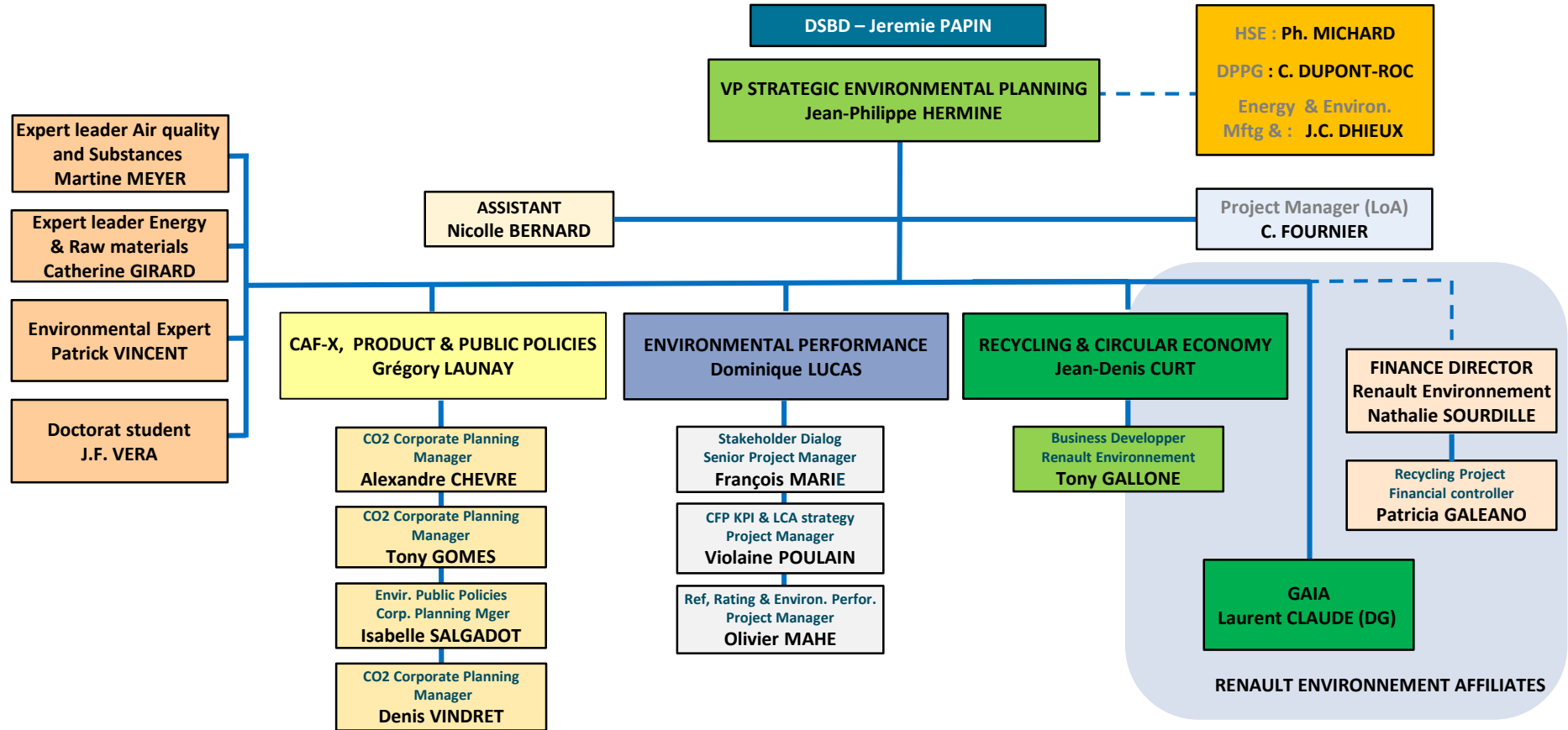
SCOPE



SCOPE & MISSIONS

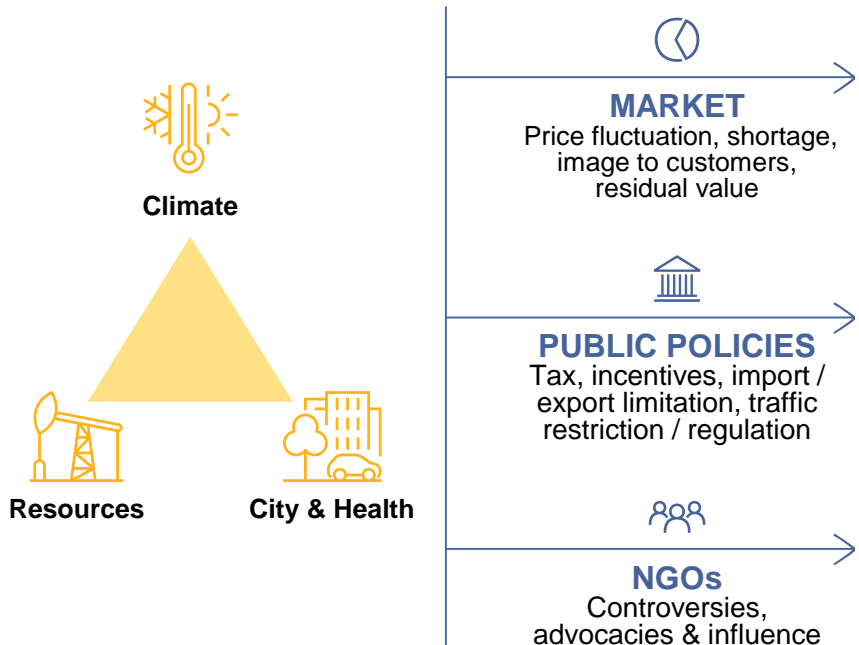


STRATEGIC ENVIRONMENTAL PLANNING & RENAULT ENVIRONNEMENT

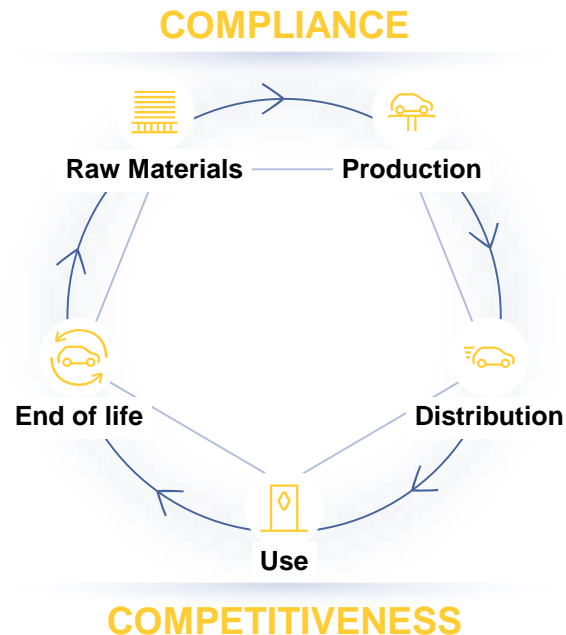


ENVIRONMENTAL STAKES, MARKET & STAKEHOLDERS PRESSURE CHALLENGE THE CAR INDUSTRY BUSINESS COMPLIANCE & COMPETITIVENESS

3 MAJOR ENVIRONMENTAL STAKES CHALLENGING...

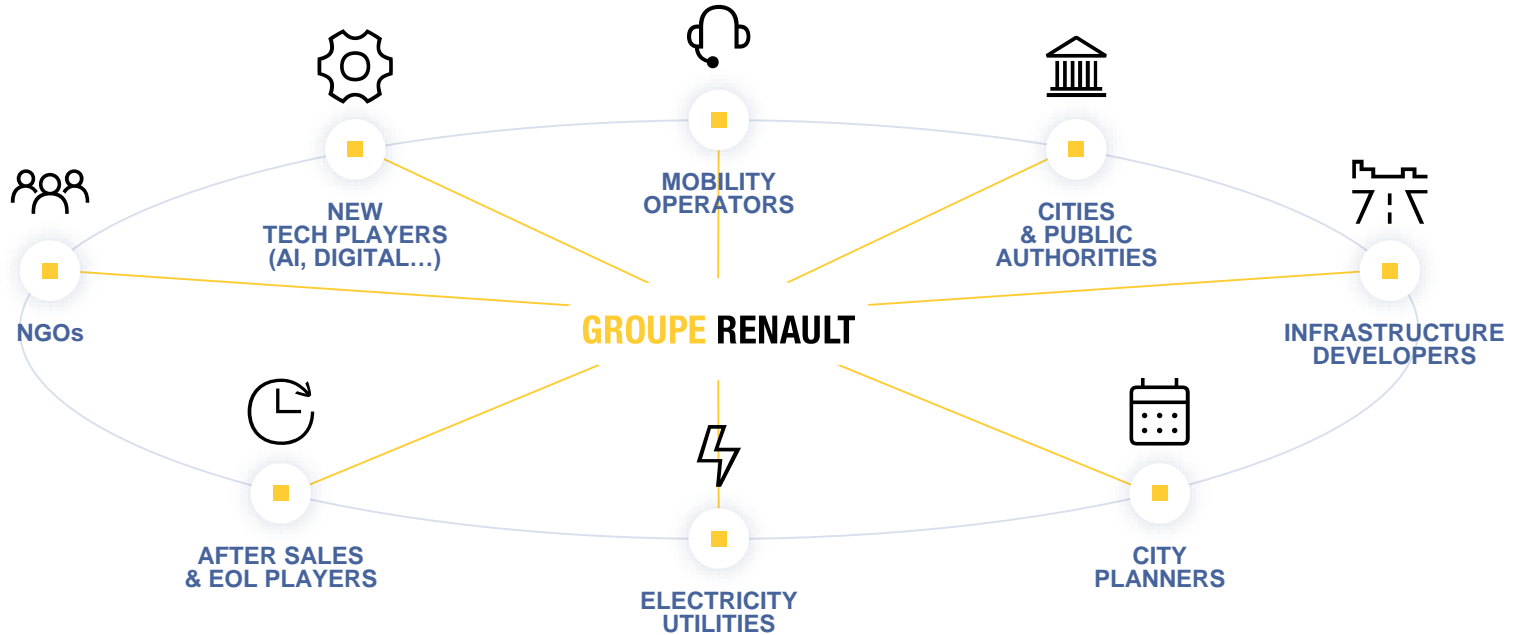


...THE AUTOMOTIVE INDUSTRY LIFE CYCLE



RENAULT'S ACTIONS INCREASINGLY NEED TO INTEGRATE INTO ECO-SYSTEMIC SOLUTIONS TO DELIVER EFFICIENT RESULTS

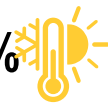
STRATEGIC ENVIRONMENT MUTATION (NEW COMPETITORS, NEW PARTNERS)



ENVIRONMENTAL STAKES



THE CAR INDUSTRY NEEDS TO CUT ITS GREENHOUSE GASES EMISSIONS BY 32% IN 2050 TO REACH COP21 OBJECTIVE AND LIMIT CLIMATE CHANGE TO 2°C

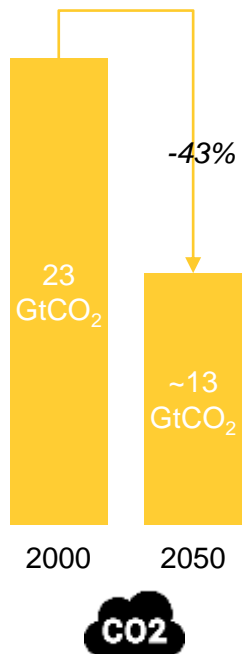


Climate change

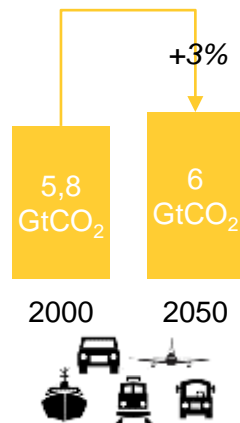
PARIS 2015
LEADERS' SUMMIT
CLIMATE CHANGE CONFERENCE

Target
+2°C
between 1990
and 2100

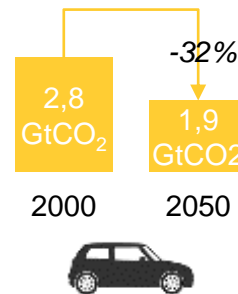
Global GHG emissions



Transports emissions



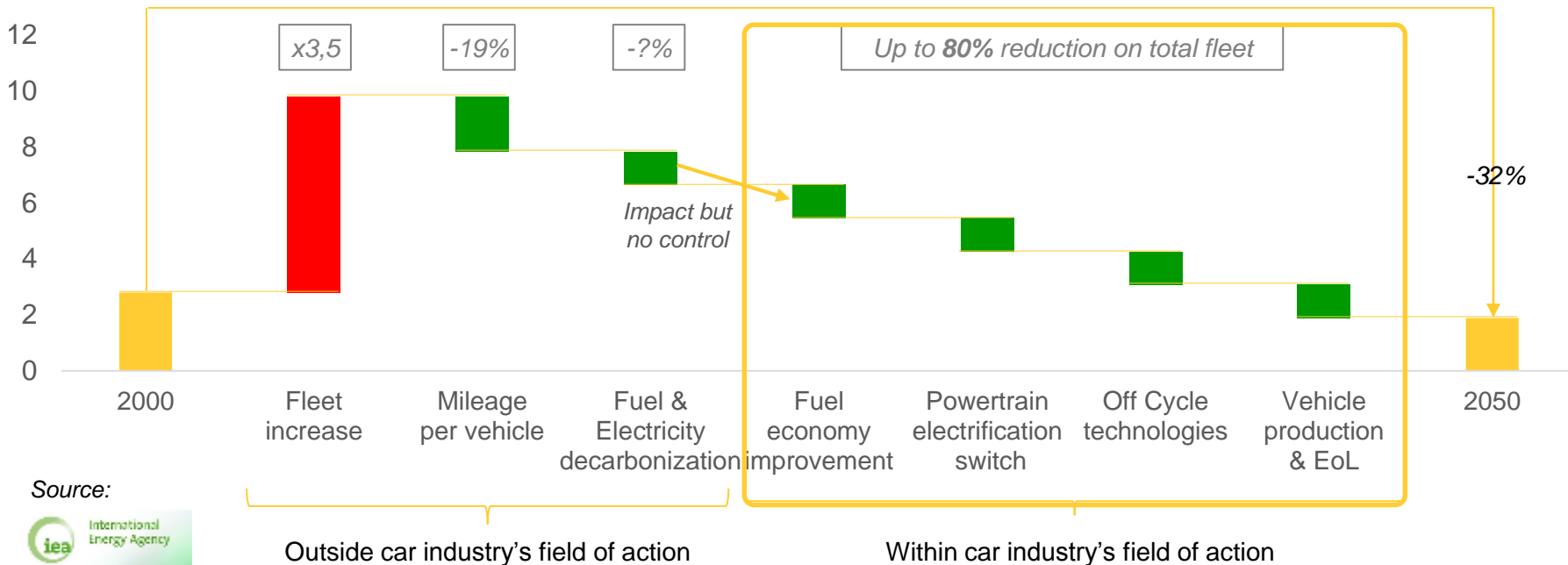
PLDV emissions



THE CAR INDUSTRY WILL ABSORB THE BULK OF THE EFFORT THROUGH POWERTRAIN TECHNO SWITCHES, ICE IMPROVEMENT AND OTHER INNOVATIONS



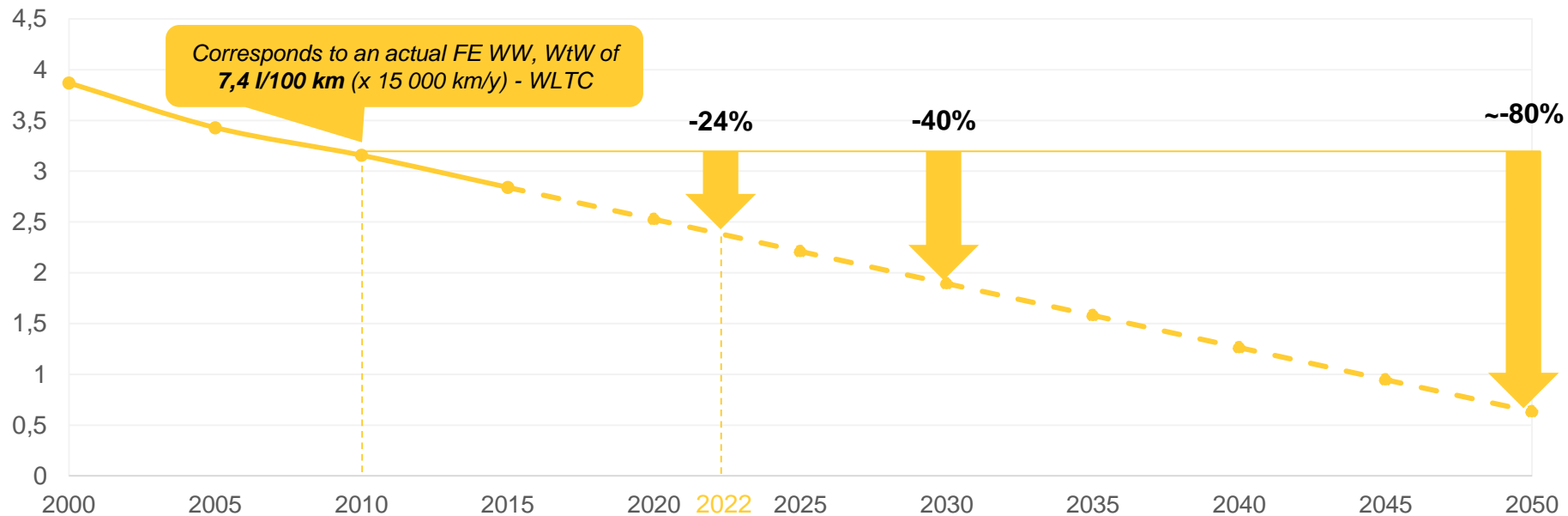
LDV GHG emissions (GtCO₂eq)



THIS TARGET REQUIRES THAT LIFE-CYCLE EMISSIONS OF NEW VEH. SHOULD DECREASE BY 24% IN 2022 FROM 2010



Industry target on its field of action (WtW tCO₂eq / veh sold / y)



Source:  International Energy Agency

Reference



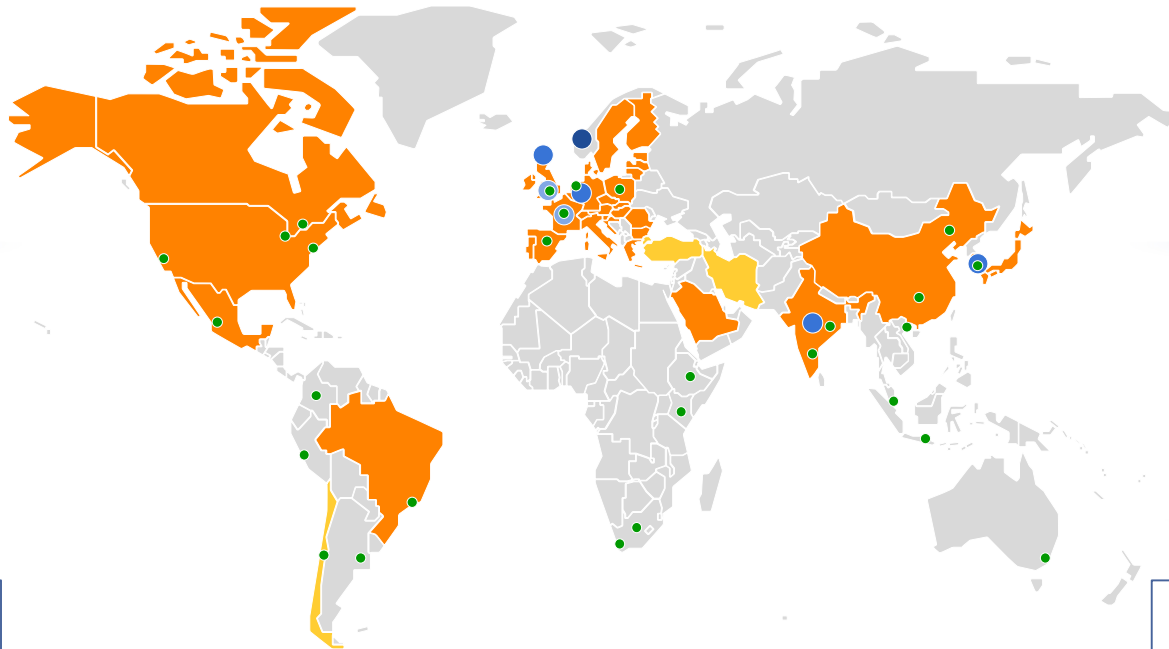


RENAULT MUST COMPLY WITH AND ANTICIPATE THESE POLICIES THAT COVER MOST OF ITS STRATEGIC MARKETS ON THE SHORT AND LONG-TERM

FUEL ECONOMY REGULATION

- 2017 CAFE regulation
- CAFE regulation not yet voted

~80%
of Renault 2017 sales

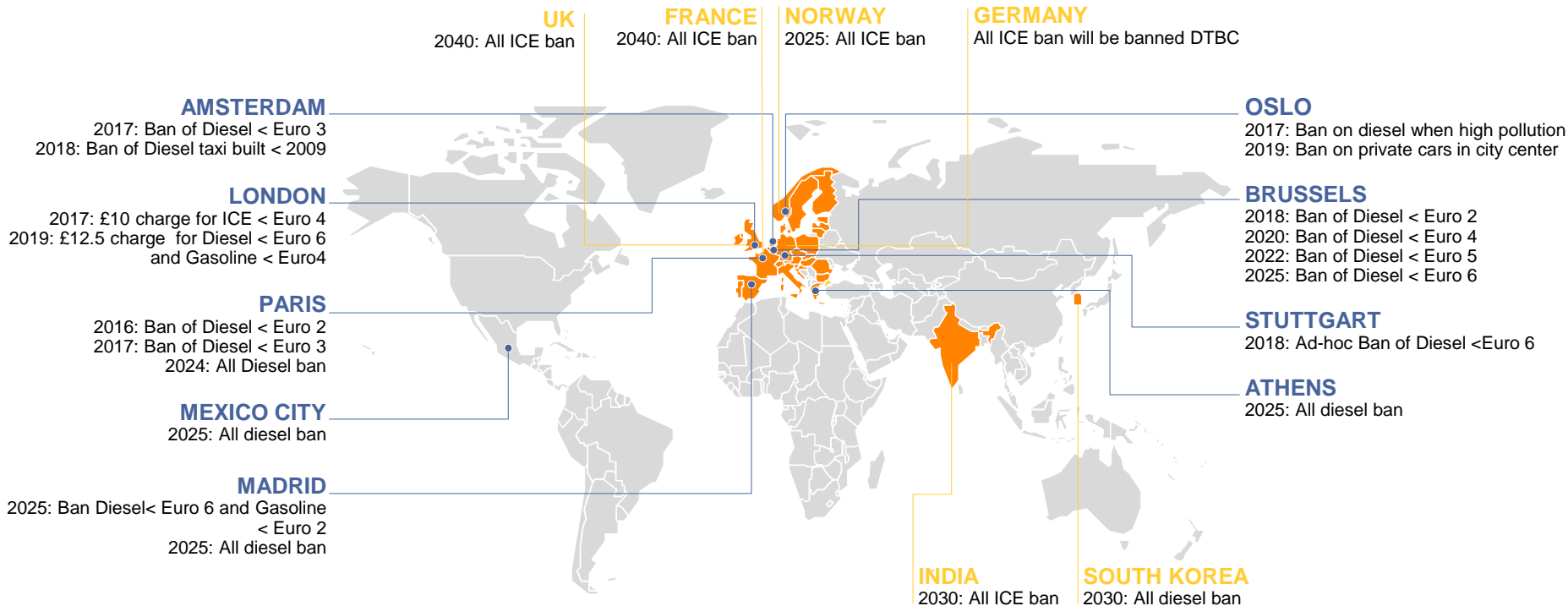


CIRCULATION RESTRICTION

- 2025
- 2030-2032
- 2040
- Main C40 cities

~40%
of Renault 2017 sales

RENAULT MUST COMPLY WITH AND ANTICIPATE THESE POLICIES THAT COVER MOST OF ITS STRATEGIC MARKETS ON THE SHORT AND LONG-TERM



THE MTP 2022 EMBEDS THE ENVIRONMENTAL LEVERS AND LANDING POINT



TECHNOLOGY DISRUPTION



- Electric
- Connected
- Autonomous
- Mobility services

NEW CUSTOMER TRENDS



- Digital customer
- Mobility services in cities
- Individual Mobility in emerging countries

REGULATIONS



- CAFE
- Euro 6
- China 6
- ULeV 5
- LeV 7
- City regulations

BENEFITS TO SOCIETY



- **-25% carbon footprint*** (2022 vs 2010)

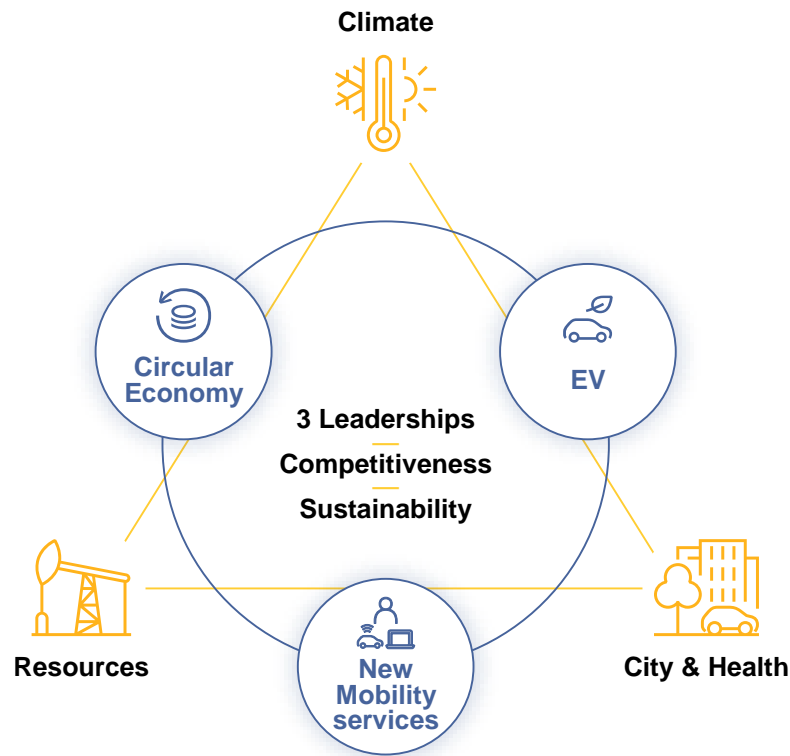
* per vehicle

RENAULT ADDRESS THE 3 ENVIRONMENTAL STAKES THROUGH 3 LEADERSHIP BUSINESS CLAIMS

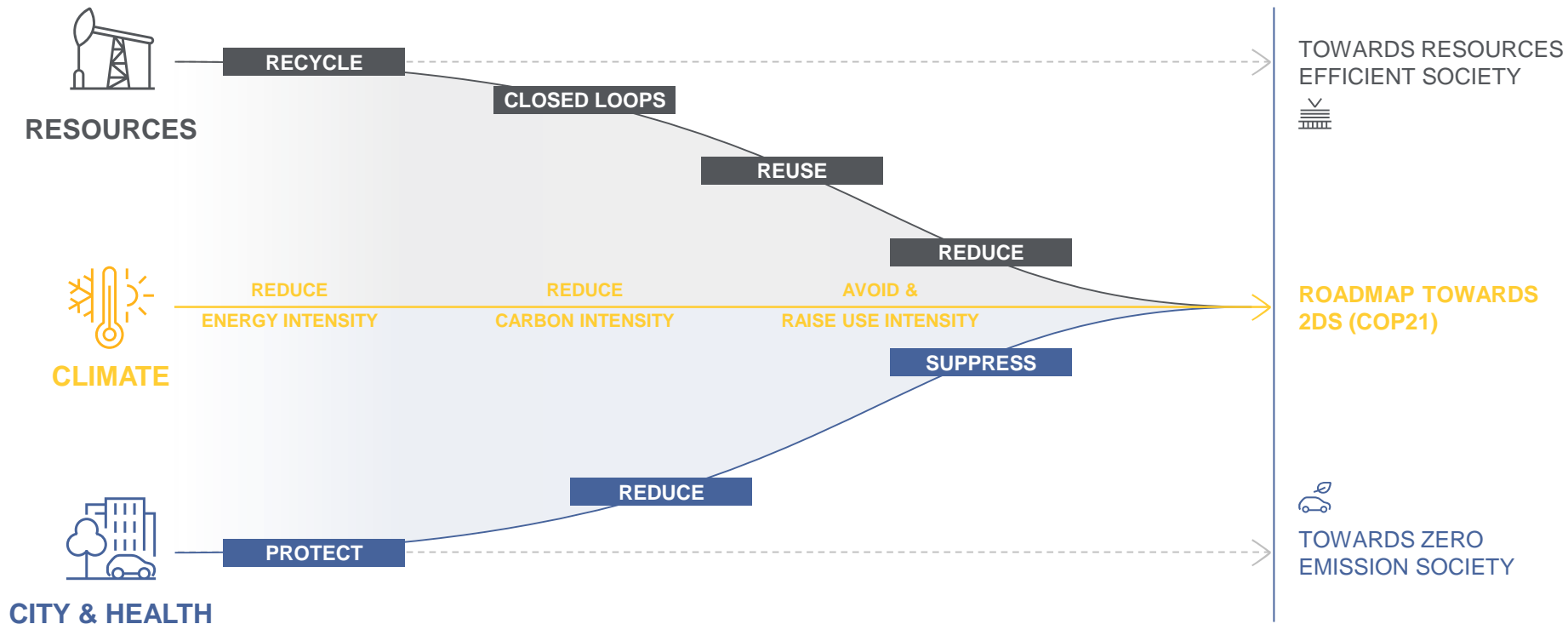


- △ **3 environmental stakes** challenge automobile industry & reshape the market
- Renault address those stakes through **3 transversal leadership claims** able to enhance innovation and transformation

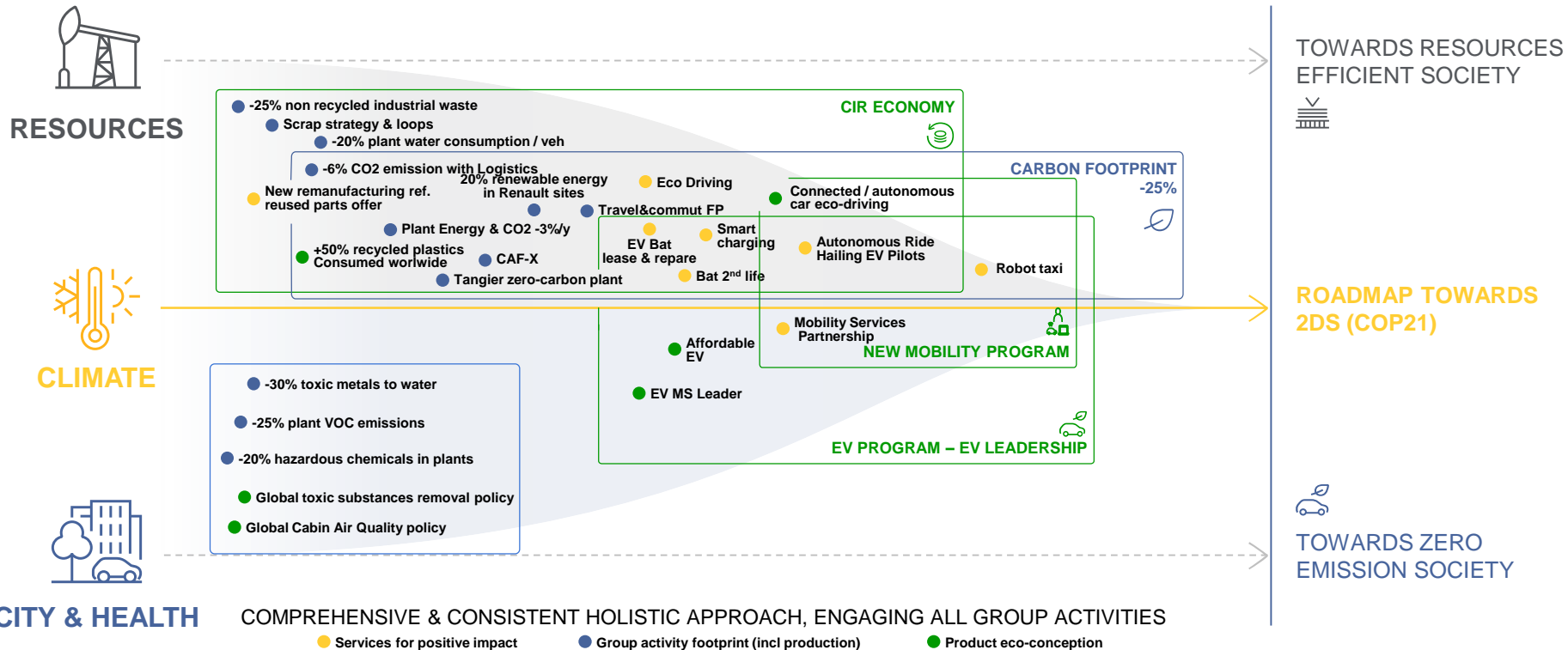
ONE INDICATOR FOR OVERALL GLOBAL PROGRESS:
CARBON FOOTPRINT -25%
 (2022/2010 PER VEH SOLD) IN LINE WITH COP21 2DS OBJECTIVE



RENAULT STAYS ON COURSE ON A HOLISTIC, DETAILED AND BALANCED ROADMAP TOWARDS AN EFFICIENT, ZERO EMISSIONS AND COP21 COMPLIANT SOCIETY



THIS APPROACH IS BUILT ON SPECIFIC ACTIONS AND COMMITMENTS SUPPORTING THE LEADERSHIP CLAIMS



THANK YOU