



Renault
Group

Investor Meeting - ReFactory

October 14th 2022

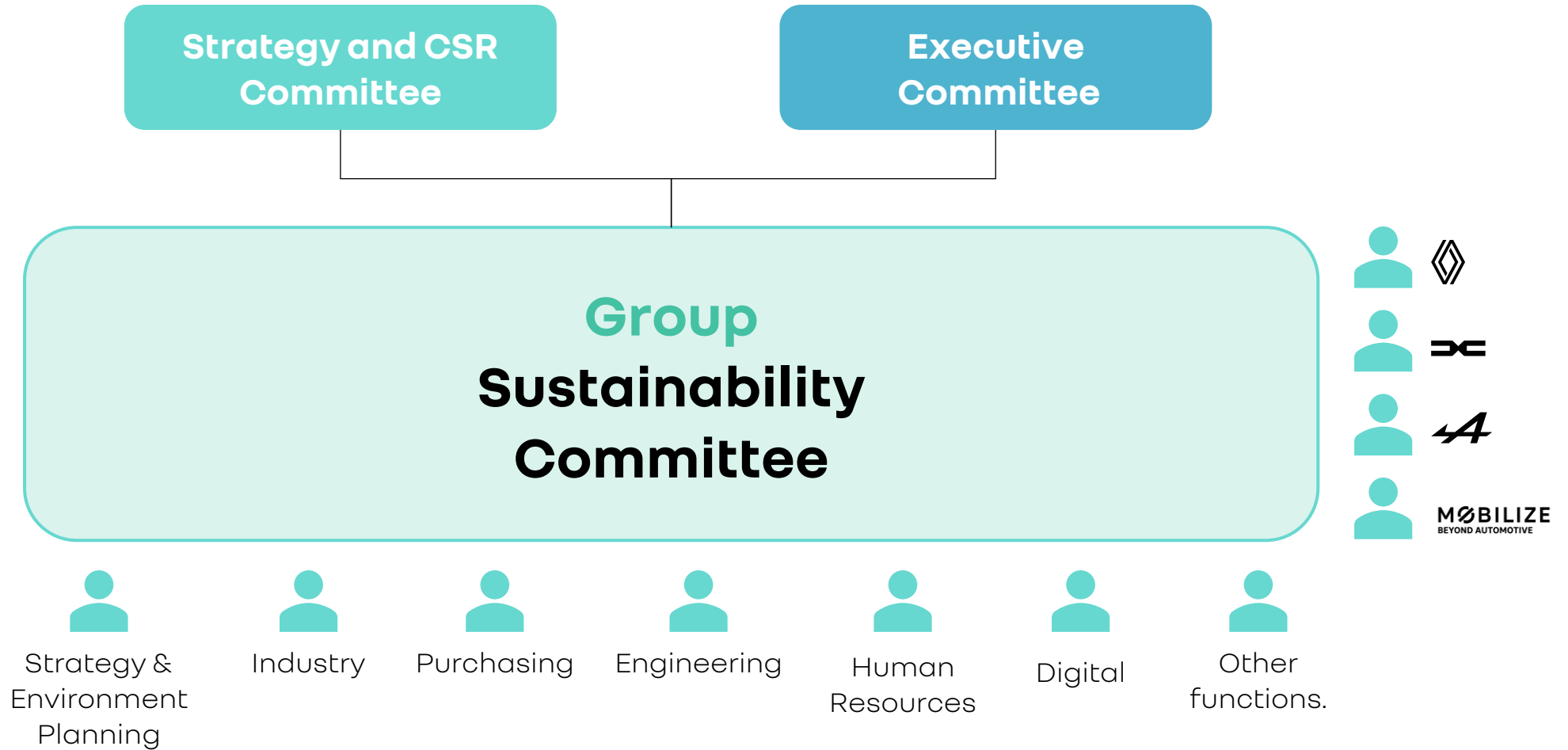
01

SUSTAINABILITY AT RENAULT GROUP

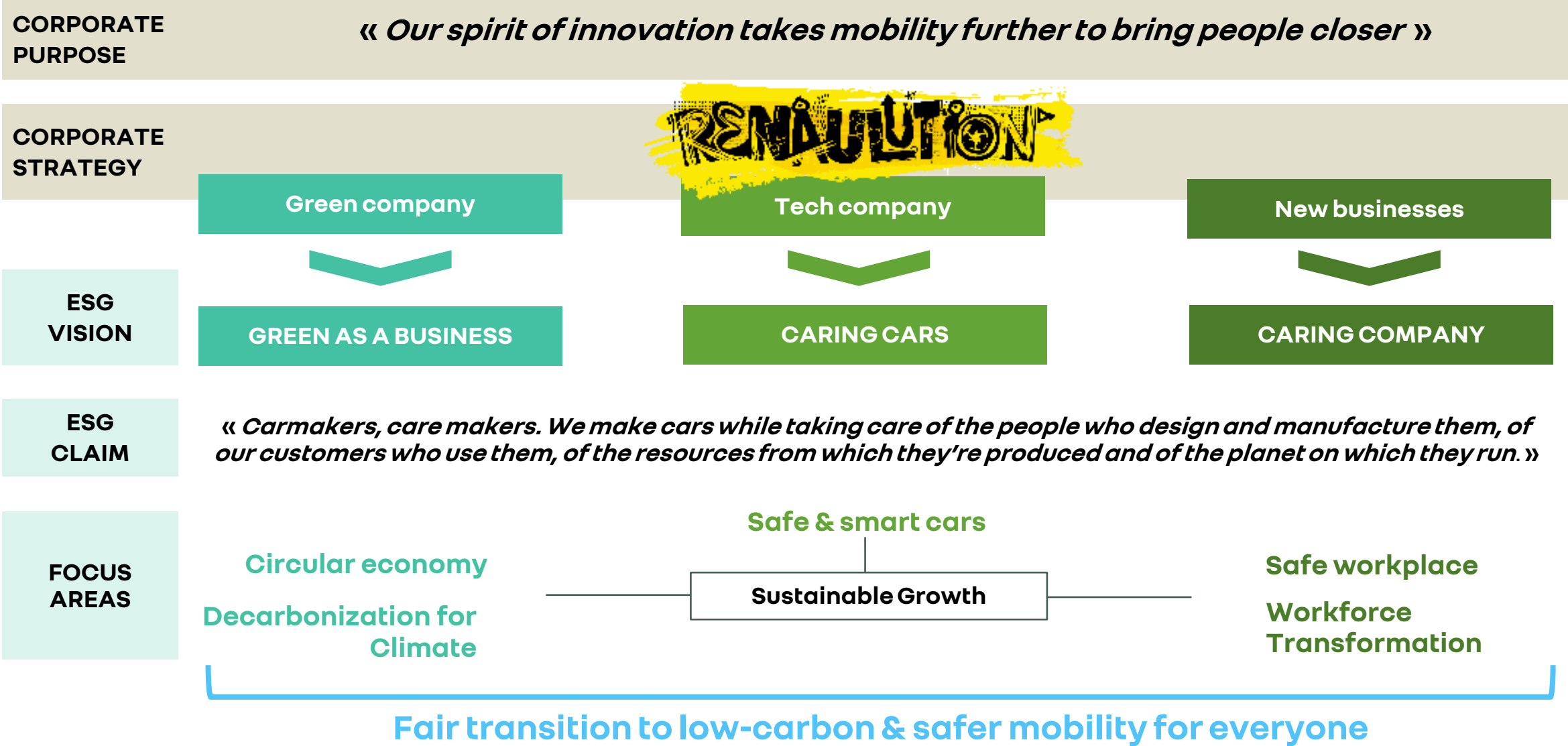
CLÉA MARTINET
VP SUSTAINABILITY



A dedicated governance for ESG



Our ESG strategy ensures Renault's sustainable deployment



Strong ambitions & strategic partnerships revealed in 2021

Decarbonization: engaged



Suppliers



RG
2030

-30%
CO₂ materials*
-35%
CO₂ battery*

**Decarbonization
of all European
plants
by 2030**

-65%
well-to-wheel
emissions in
Europe*



IBERDROLA **ElectriCity**

W WHYLOT

New initiatives
& partners

Carbon neutrality
Europe 2040 & **Worldwide 2050**

Circular economy: accelerate



120,000 vehicles
refurbished/year
20,000 batteries
repaired/year

80% of recycled
battery minerals
injected in new
batteries

Refactory



€1bn

Revenue by 2030

* versus 2019

A new ambition for sustainability
Scenic Vision concept-car

RG

change**NO**W

Safety

-70% accidents
No-stress tech

Climate

Zero CO₂ in
production & in use

Inclusion

Easy access

Hydrogen

Range extender



95% Recyclable,
incl. the battery

Ressources

70% Recycled

02

CIRCULAR ECONOMY

JEAN-PHILIPPE BAHUAUD

VP CIRCULAR ECONOMY, CEO THE FUTURE IS NEUTRAL



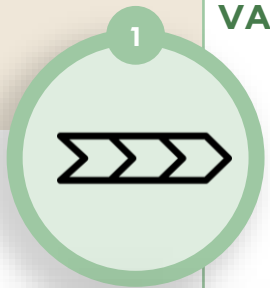
Circular economy's potential leaning on 5 deep mutations in the auto industry

ENERGY TRANSITION



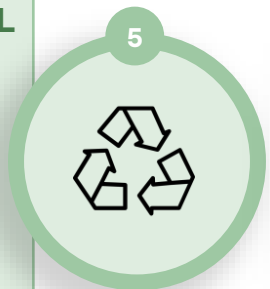
- **BEV push:** from **9% EVs** in the sales (EU) in 2021 to **45%** in 2030¹⁾
- **ICE vehicles phase-out:** 0% ICE sold in 2035

VALUE CHAIN PARADOX



From mining to recycling, **new areas** triggering **partners needs**
vs
Needs to secure supply of **scarce resources** via **control** of the chain

CIRCULAR ECONOMY POTENTIAL

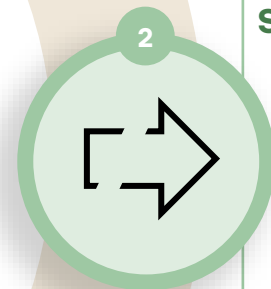


- **Cars are recyclable champions:** 78% of veh' materials are recycled
- **But new cars don't use recycled materials:** 79% of material inputs for NV comes from virgin sources

Automotive industry

Renault Group

SUPPLY CHALLENGES



- **E.g; Nickel Class 1/ Cobalt** 65% from China²⁾
- **E.g; Primary aluminum** 63% from China and Russia²⁾

REGULATION BOOMING



- **Old Vehicles:** mandatory ELV³⁾ collection and recycling in 2023
- **Batteries:** recycled rates of 12% Co, 4% Ni, 4% Li by 2030
- **Plastics:** 15% of post-consumer recycled plastic in NV by 2028⁴⁾

VIRGIN PRICE VOLATILITY



- **E.g; Lithium** price x7 in 1 year
- **E.g; Steel** price x1,5 in 2 years

1) Internal Forecast; Passenger cars only.

2) internal data

3) End Of Life Vehicles (ELV) : vehicles ready to be dismantled for recycling.

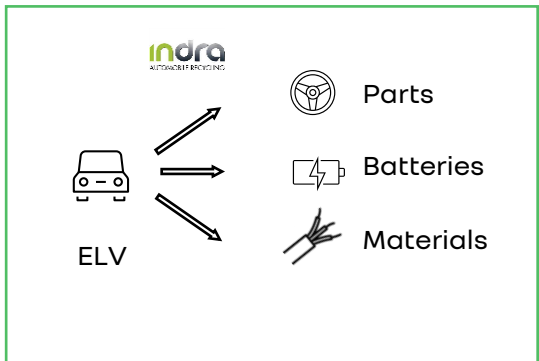
4) Alliance assumption.

Our answer to circular economy potential

THE FUTURE IS NEUTRAL  Renault Group's holding of Circular Economy businesses

INDRA

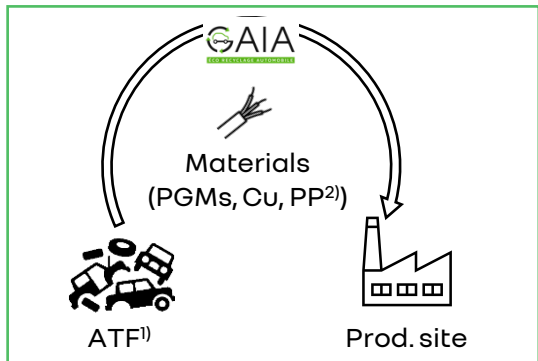
End-Of-Life dismantling



Parts, batteries & materials for recycling

GAIA

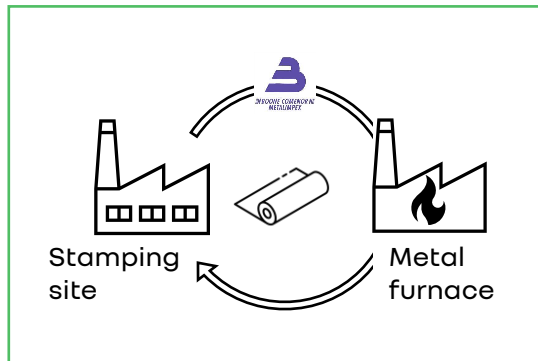
Materials Short Loop



Recycling loops "from car to car"

BOONE COMENOR

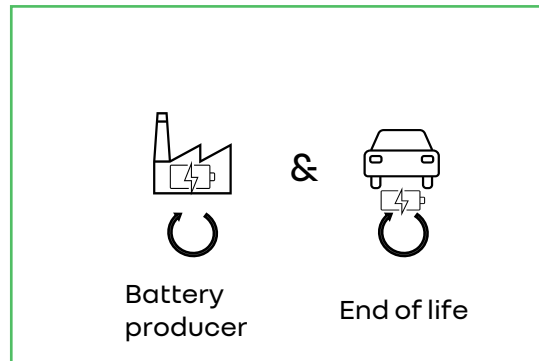
Metal production scrap recycling



Increase of recycled steel content in vehicles

BATTERY RECYCLING NEW

Recycling of scrap & End of Life



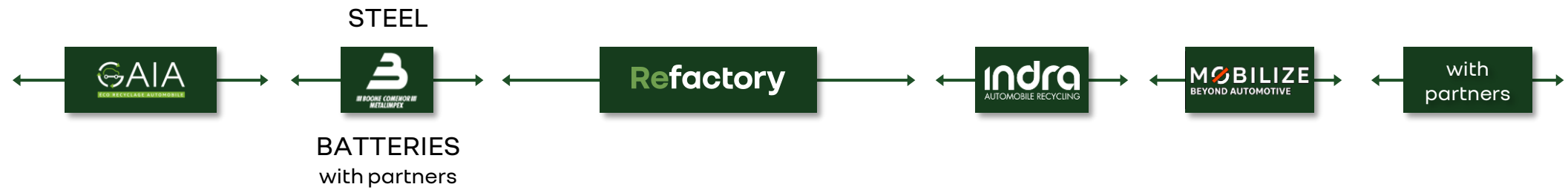
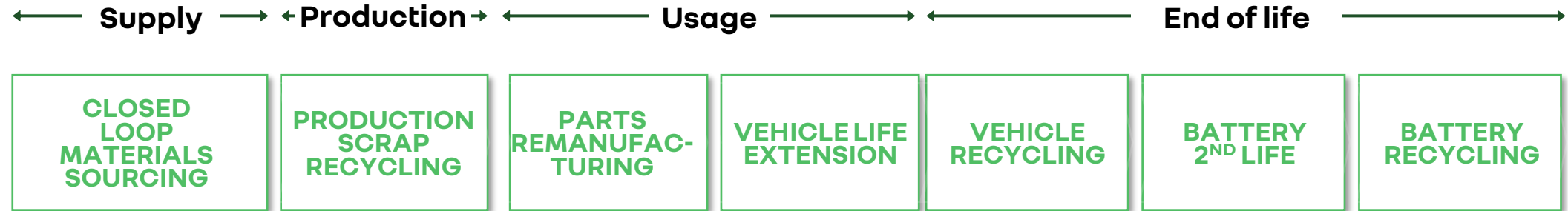
Recycled Co/Ni/Li for new auto batteries



Note: Circular Economy consulting services and part of Refactory's activities (e.g Reman to be part of The Future Is Neutral activities as well)

1) Authorized Treatment Facility; 2) Platinum Group of Metals (Platinum, Palladium, Rhodium); Copper & Polypropylene (plastics)

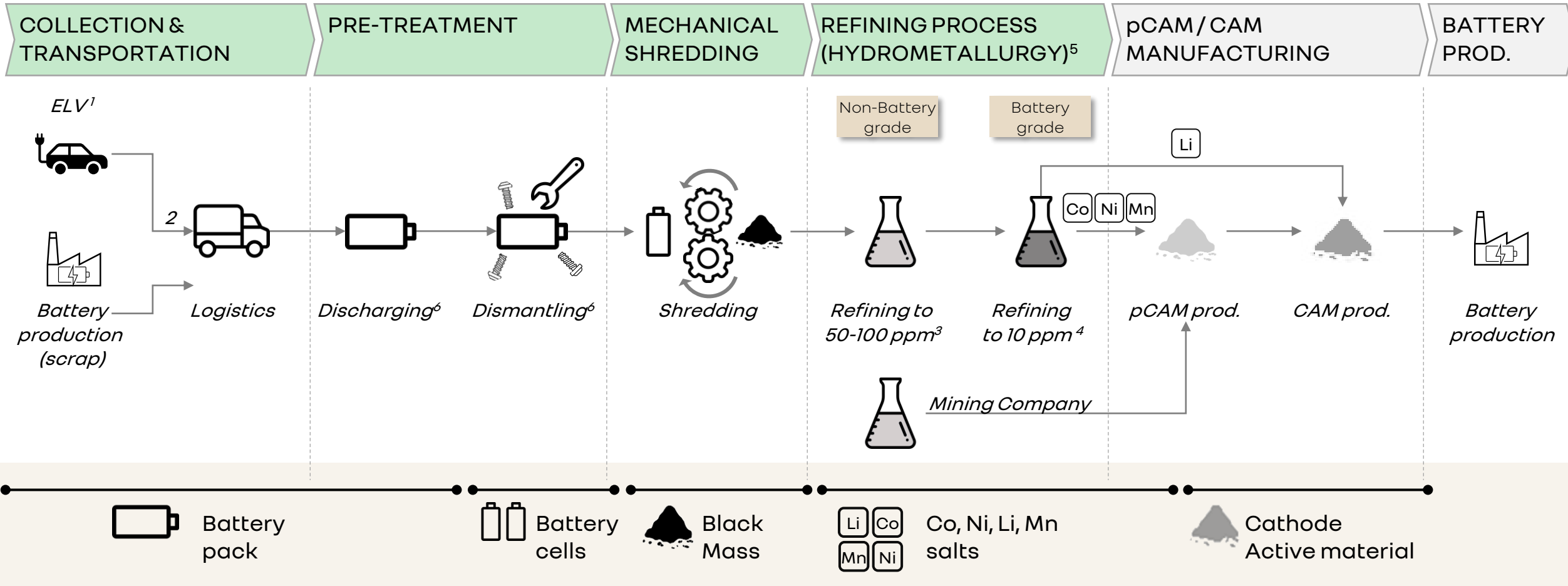
Circular economy solutions throughout the car's lifecycle



Battery recycling : the Future Is Neutral involved in recycling to battery-grade material

THE FUTURE IS NEUTRAL PRESENCE ON ENTIRE RECYCLING SCOPE

PRODUCTION

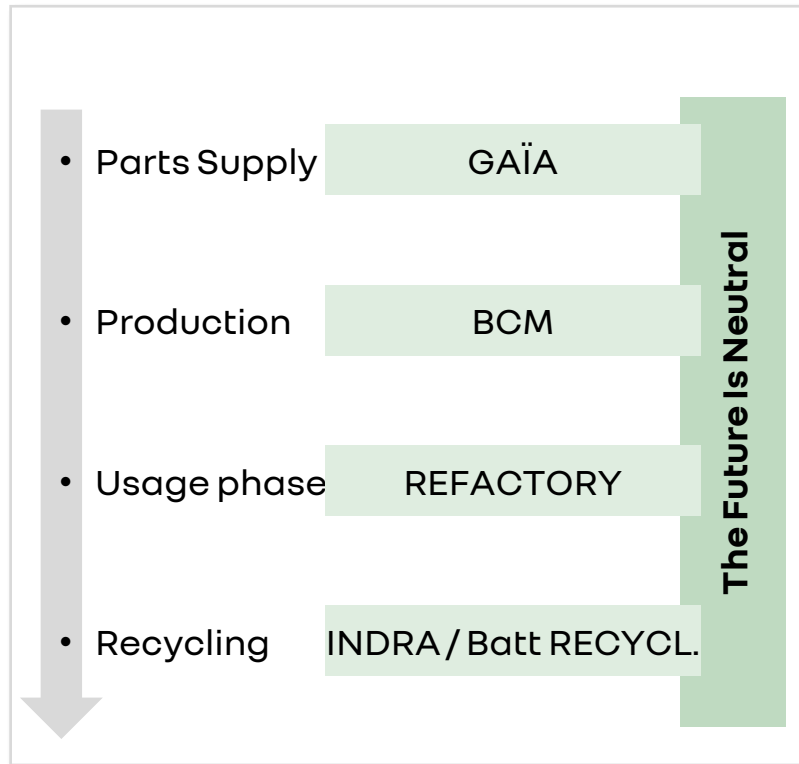


1) ELV: End of Life Vehicle; 2) For tested batteries that need to be recycled; 3) Not battery grade; 4) Automotive battery grade; 5) Pyrometallurgy out of scope; 6) only applies to EoL batteries

The Future Is Neutral is unique in the automotive world

FIRST 360° SOLUTION IN THE AUTO WORLD

Unique « one stop shop » providing **circular solutions for each step of the car lifetime**



ONLY OEM WITH OPERATIONAL BUSINESS (EU)

Only player of the automotive world having launched **closed recycling loops**

2021 highlights	
GAÏA	Revenue ~€50m High margin
BCM	Revenue >€600m High margin
REFACTORY	1 st site dedicated to circular eco. in EU
INDRA	Revenue >€60m High margin

SIGNIFICANT KNOW-HOW IN ELECTRIC VALUE CHAIN

10+ years of experience in the EV space
Advantages of **battery leasing**

Largest EV park size (2021)	600k EVs (RG) 300k EVs (N)
Largest Recycled batteries (2021, open loop)	2,000 units

The Future Is Neutral poised to significantly grow in next 8 years

REALIZED IN 2021



STEEL

RECYCLED FROM PRODUCTION SCRAP

>1.8m

TONS



TARGET 2030: x2

>3m

TONS



PLASTICS & COPPER

RECYCLED FROM END-OF-LIFE VEHICLES

>1,300

TONS



TARGET 2030: x6

>9,000

TONS



PLATINOIDS

(PLATINIUM, PALLADIUM, RHODIUM)
RECYCLED FROM END-OF-LIFE VEHICLES

>300

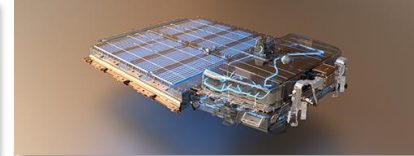
KG



TARGET 2030: x3

>1,000

KG



BATTERY MATERIALS

(LITHIUM, COBALT, NICKEL)
RECYCLED FROM POST CONSUMER & PRODUCTION SCRAP

2024

START



4,500

TONS



EOL VEHICLES

DISMANTLED

>300_K

VEHICLES



TARGET 2030: x4

>1,200_K

VEHICLES



CAPITAL OPENING TO EXTERNAL INVESTORS

03

THE FLINS PLANT



A major Renault plant since 1952

RG

KEY FIGURES

232 hectares, inc. 65 built

2,100 in house staff

700 temp workers

75% direct labour

1 shift

60 vehicles / hour
maximum capacity



Nissan Micra

since 2016
47%
of production



Renault ZOE

since 2019
53%
of production



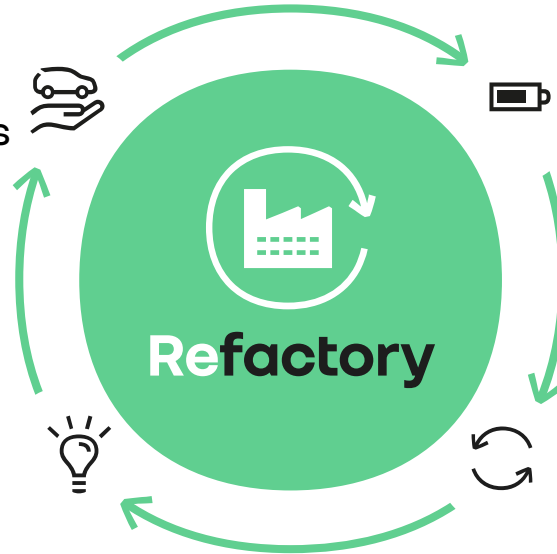
360

vehicles per day

The first European Factory dedicated to the circular economy of mobility **RG**

Re-trofit

Extending significantly the life of vehicles



Re-energy

Offering solutions for the production, storage and management of green energies

Re-start

Promoting innovation and knowledges dedicated to the circular economy of mobility

Re-cycle

Optimizing the management of resources to support the ecosystem



Objectives 2030 →

👥 **3,000** employees



Negative CO2

ReKnow University: ensuring employability and training future generations

Academic training

Applied research, co-development of certified and qualifying training, promoting apprenticeships

Vocational training

Pooling of design and diffusion of qualifying training courses

AN ECOSYSTEM OF KNOWLEDGE

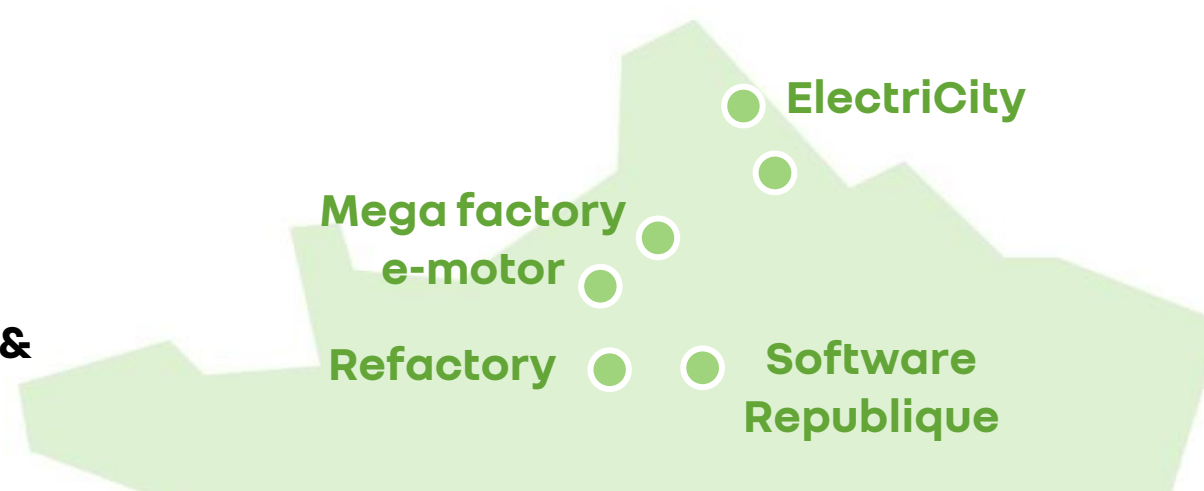


1 Electric Mobility Academy

2 Circular Economy Academy

3 Cybersecurity, Data & Software Academy

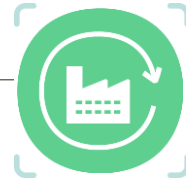
3 KNOWLEDGE AREAS
5+ CAMPUSES



Upskilling / reskilling
12,000 people
of our industrial
ecosystem
by 2025

The first campus dedicated to circular economy for mobility

A unique place combining industrial and educational resources



An ecosystem offer open to the territory and its industries

5 axes for 5 target audiences

1 Academic Education



- Training modules for students from CAP to Master

2 Professional Trainings



- Training modules for adults / professionals
- Blue & white collars (incl. Flins employees)

3 Applied Research



- Research projects with major universities and researchers

4 Inclusive Trainings



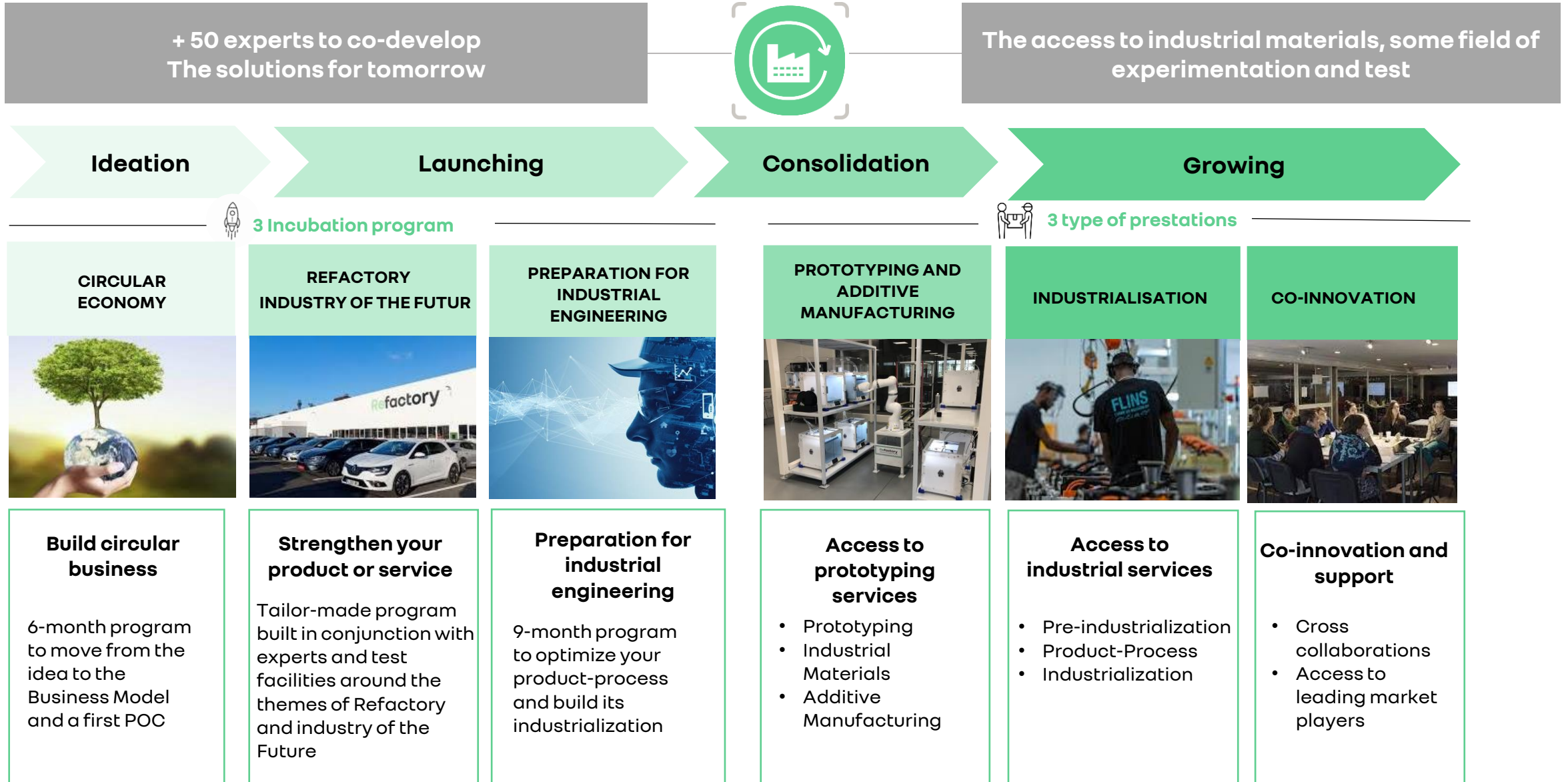
- Training modules for people left-out of the education system

5 Team & Projects Advisory



- Team seminars (Learning Expeditions)
- Project implementation support

An Open Innovation Hub to support start-ups at each stage of its growth





Thank you