

DEUTSCHE BANK AUTO CONFERENCE

Patrick Pélata – RENAULT COO

SEPTEMBER 16TH 2009

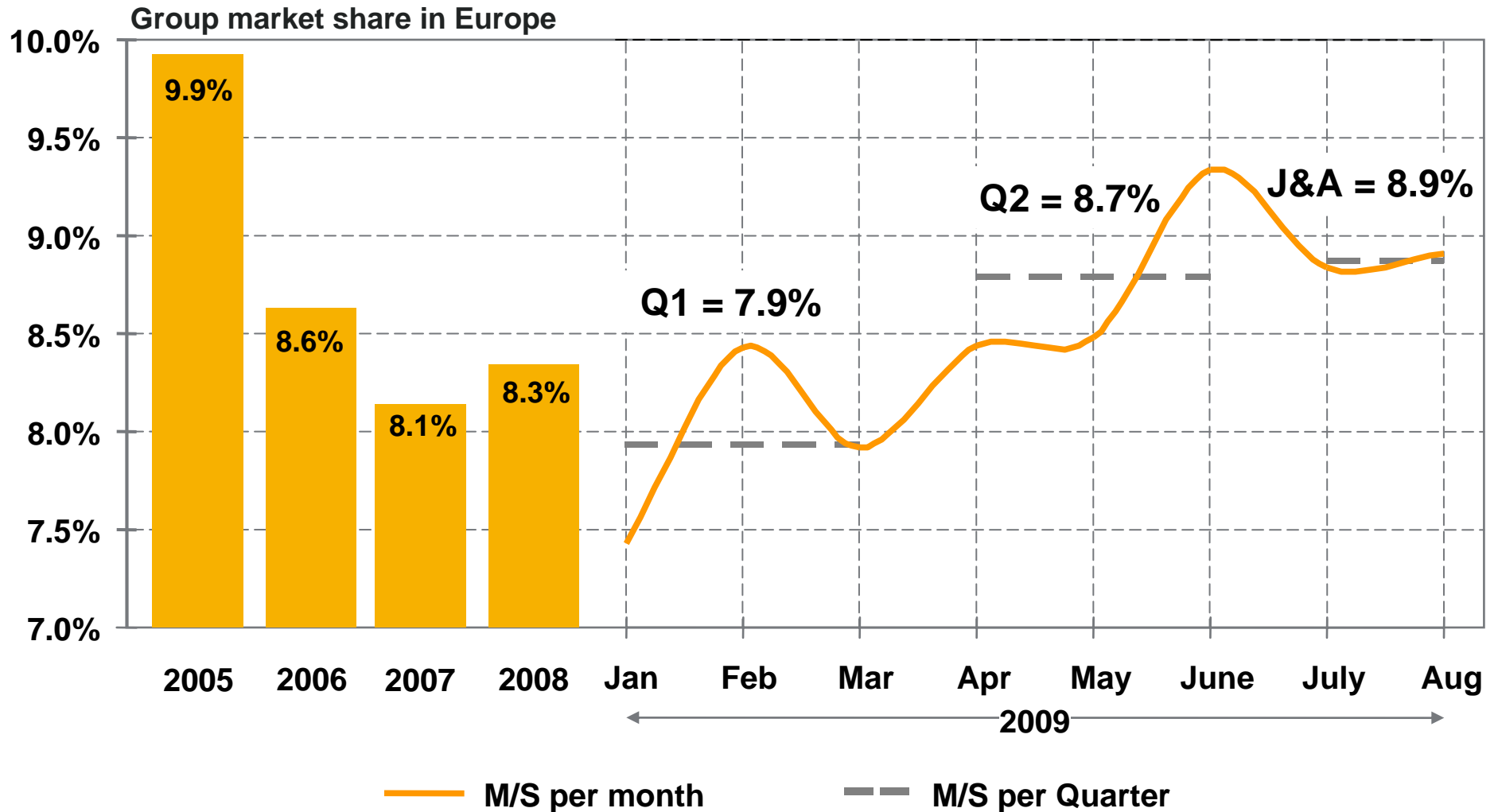


FIRST HALF 2009 – KEY POINTS

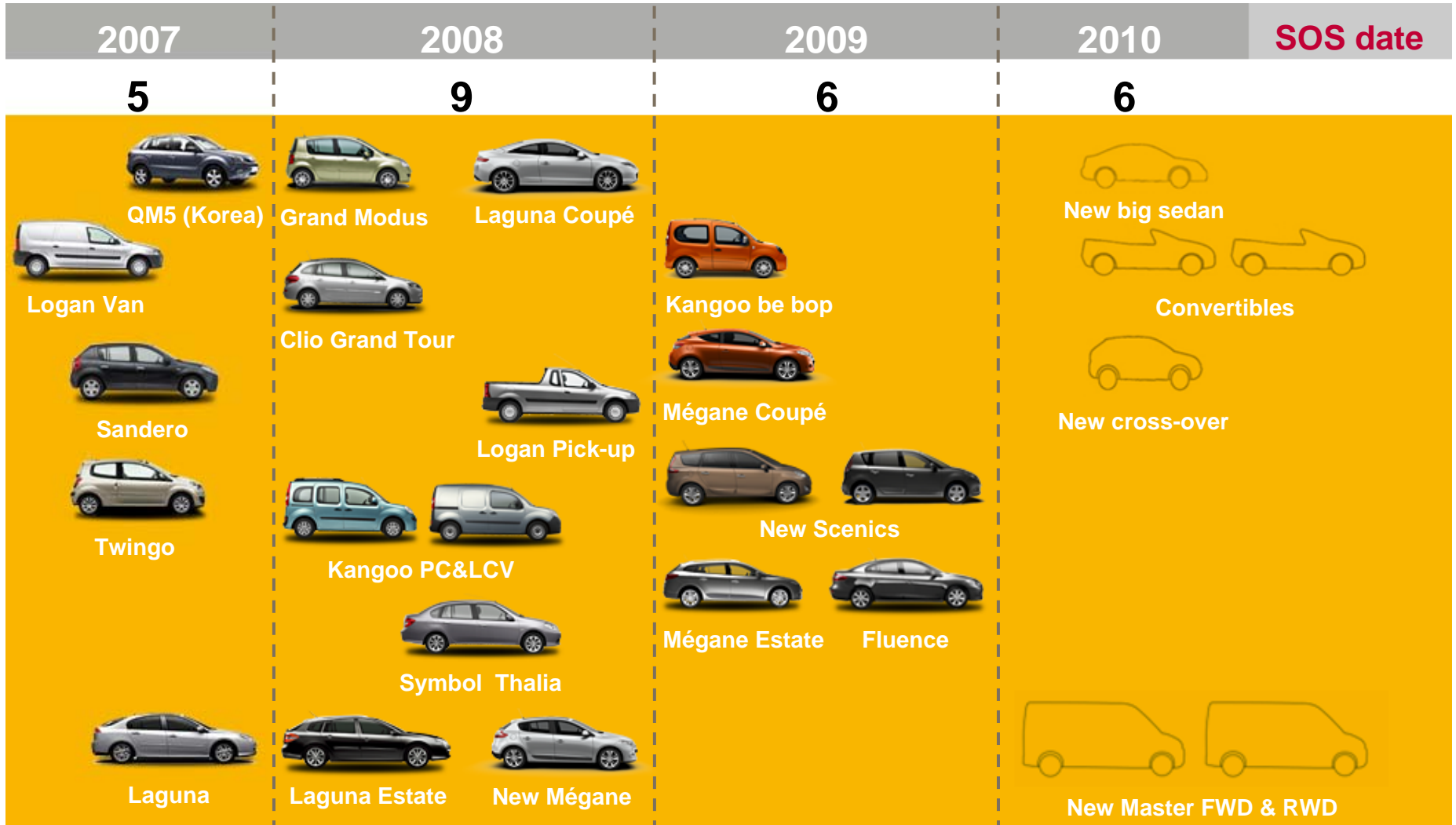
- **FCF : + €848m at end June 2009**
- **Net debt reduced by €0.7bn**
- **2009 Fixed costs -15% vs. 2007**
- **Inventory - €2.1bn in 12 months**



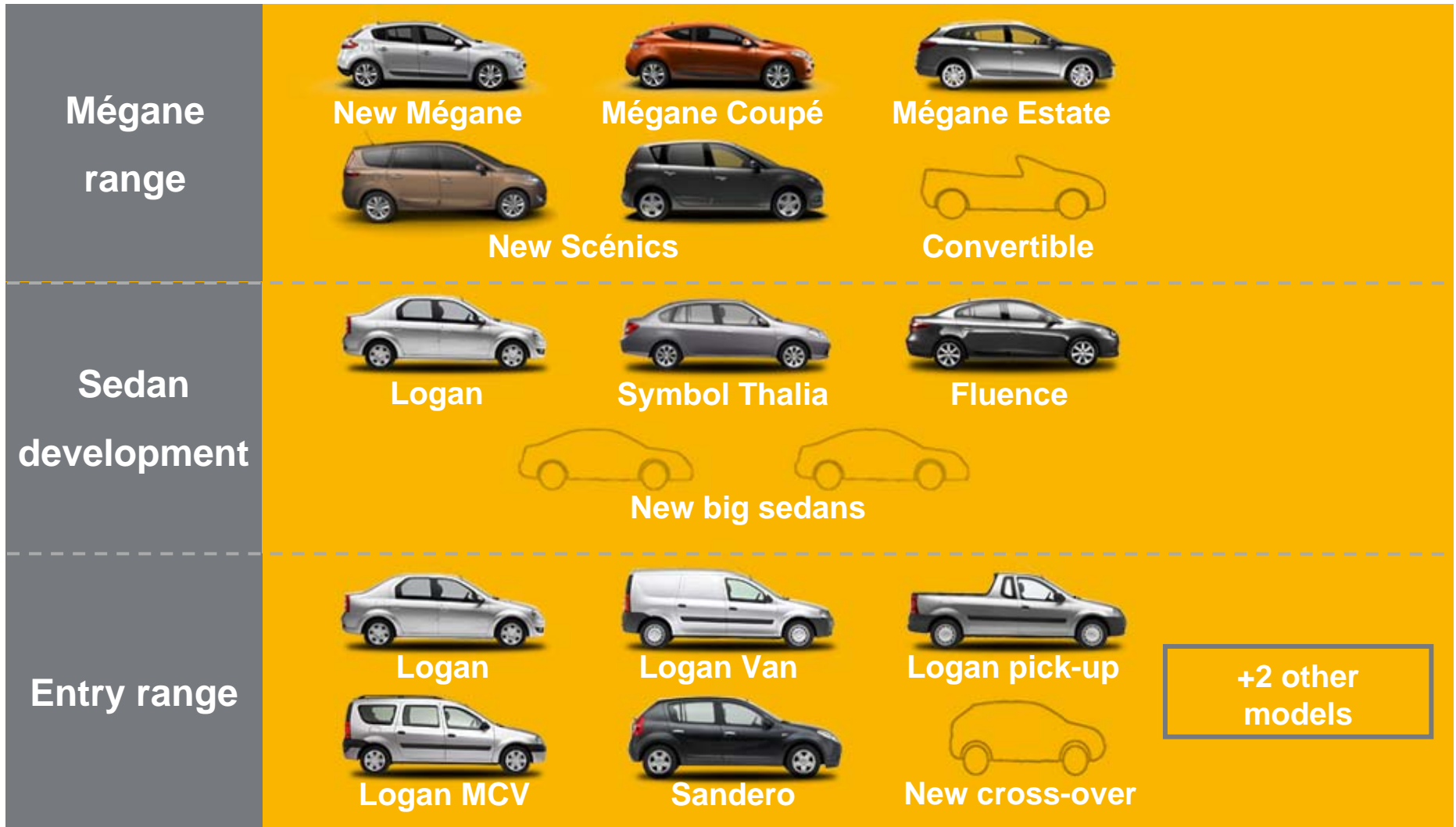
MARKET SHARE MOMENTUM – PASSENGER CARS



2010 – CONTINUING A STRONG PRODUCT MOMENTUM



THE AXIS OF THE PC LINE-UP



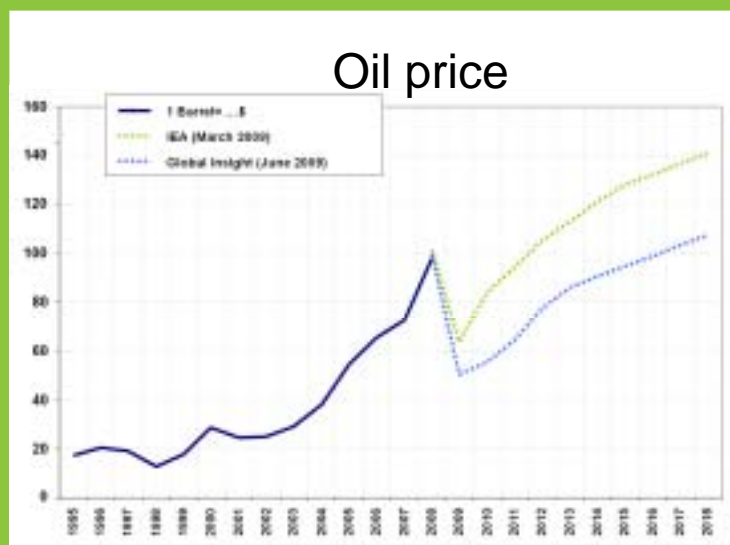
2010 – PRIORITIES

- **Take advantage of the first full year of New Mégane**
 - .. and the 6 new model launches in 2010
- **Reduce fixed costs and maximize the synergies from the Alliance**
- **Be FCF positive**
- **Prepare mass-market EVs and new  engines**

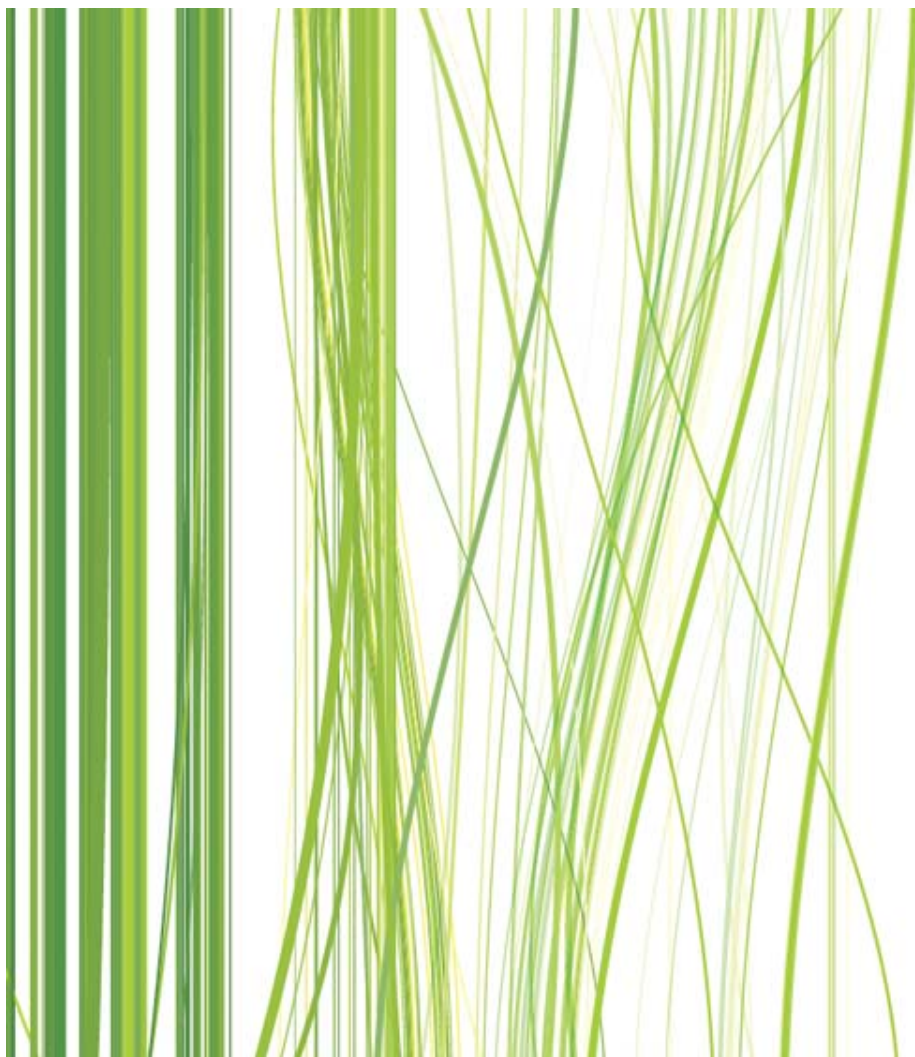


SUSTAINABLE MOBILITY FOR ALL

ENVIRONMENTAL CHALLENGES



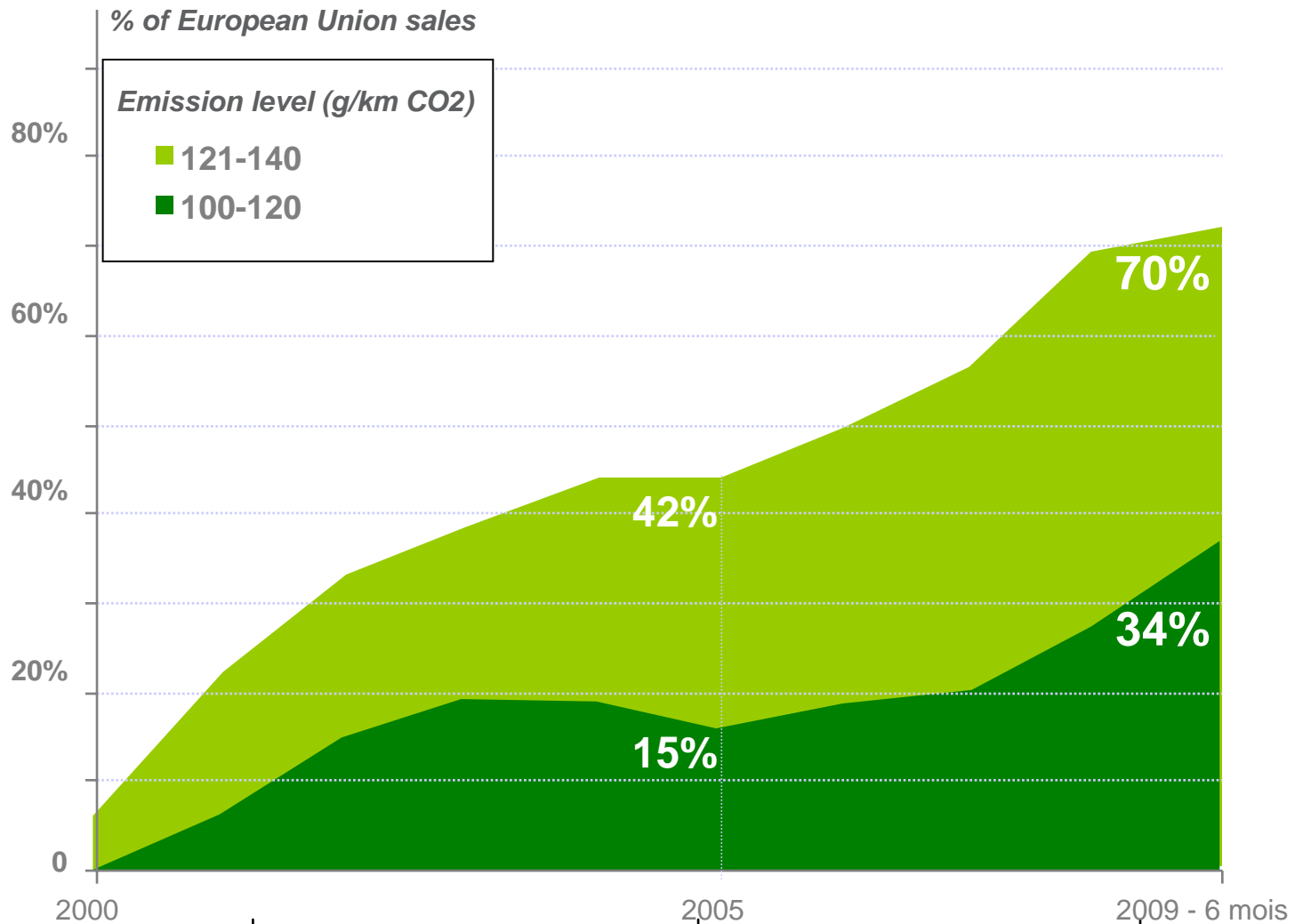
SUSTAINABLE MOBILITY FOR ALL = ECOLOGY + ECONOMY



RENAULT
eco²

Dacia
eco²

H1 2009: 70% OF RENAULT+ DACIA SALES BELOW 140G/KM, 34% BELOW 120G/KM



2010 – NEW CHAMPIONS



dCi 85
94 g



dCi 110 DCT
119 g



dCi 90
99 g



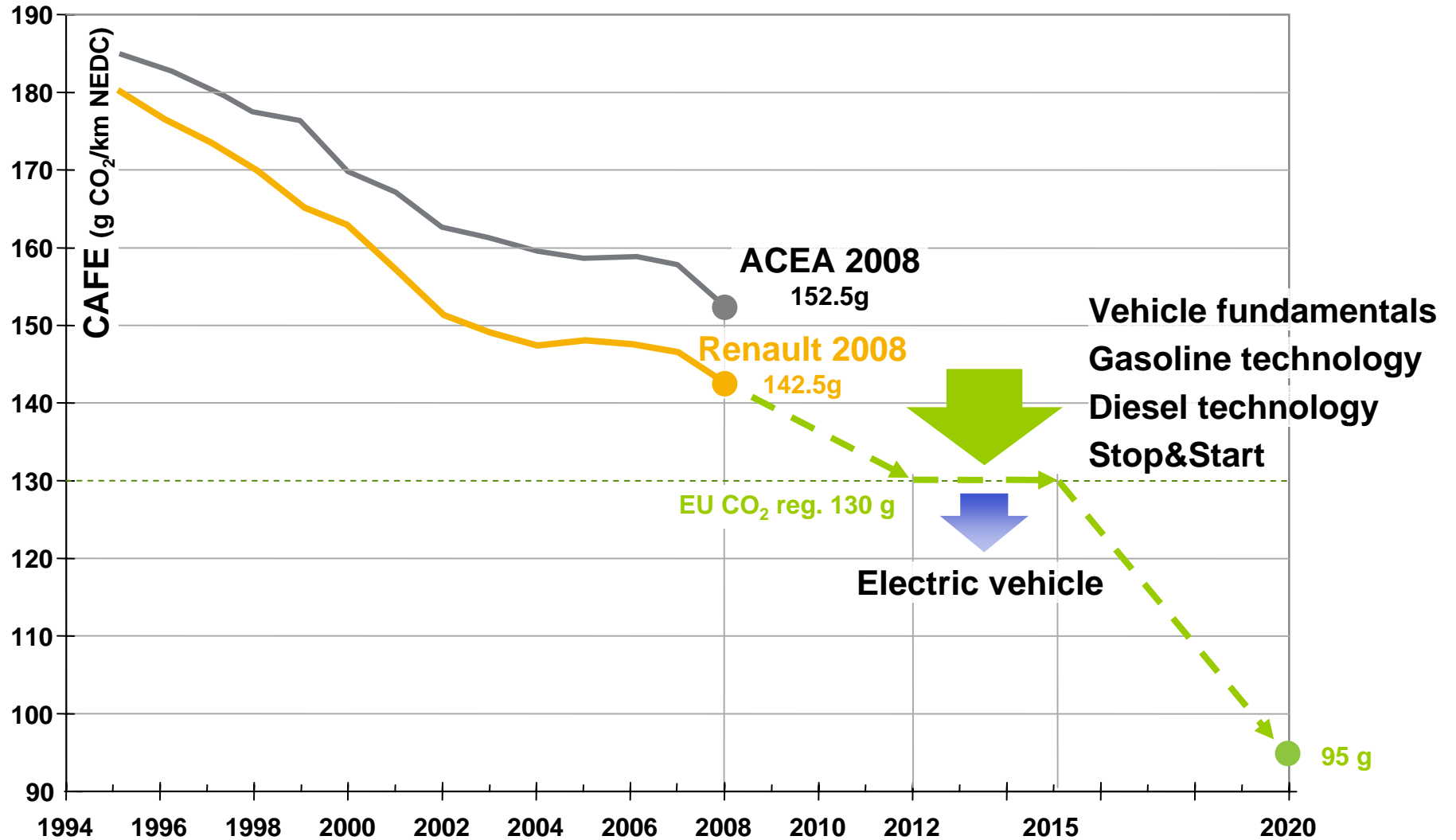
dCi 90
125 g



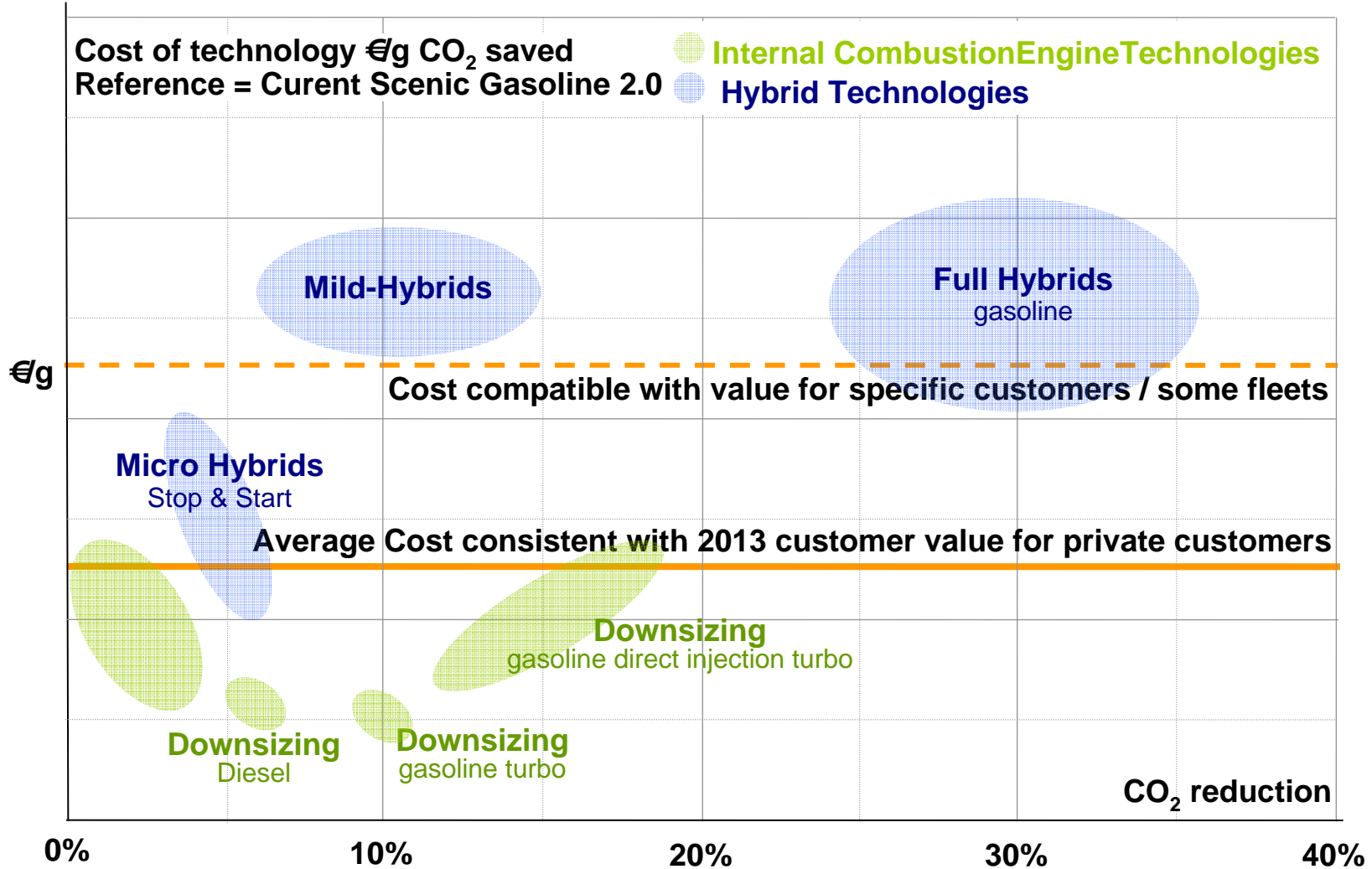
dCi 110
127 g



RENAULT IN LINE TO ACHIEVE 2012-2015 TARGETS



IMPLEMENTING TECHNOLOGIES CUSTOMERS ARE READY TO PAY FOR



ELECTRIC VEHICLE BREAKTHROUGH

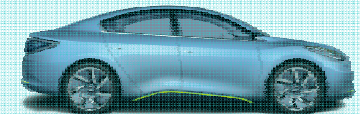
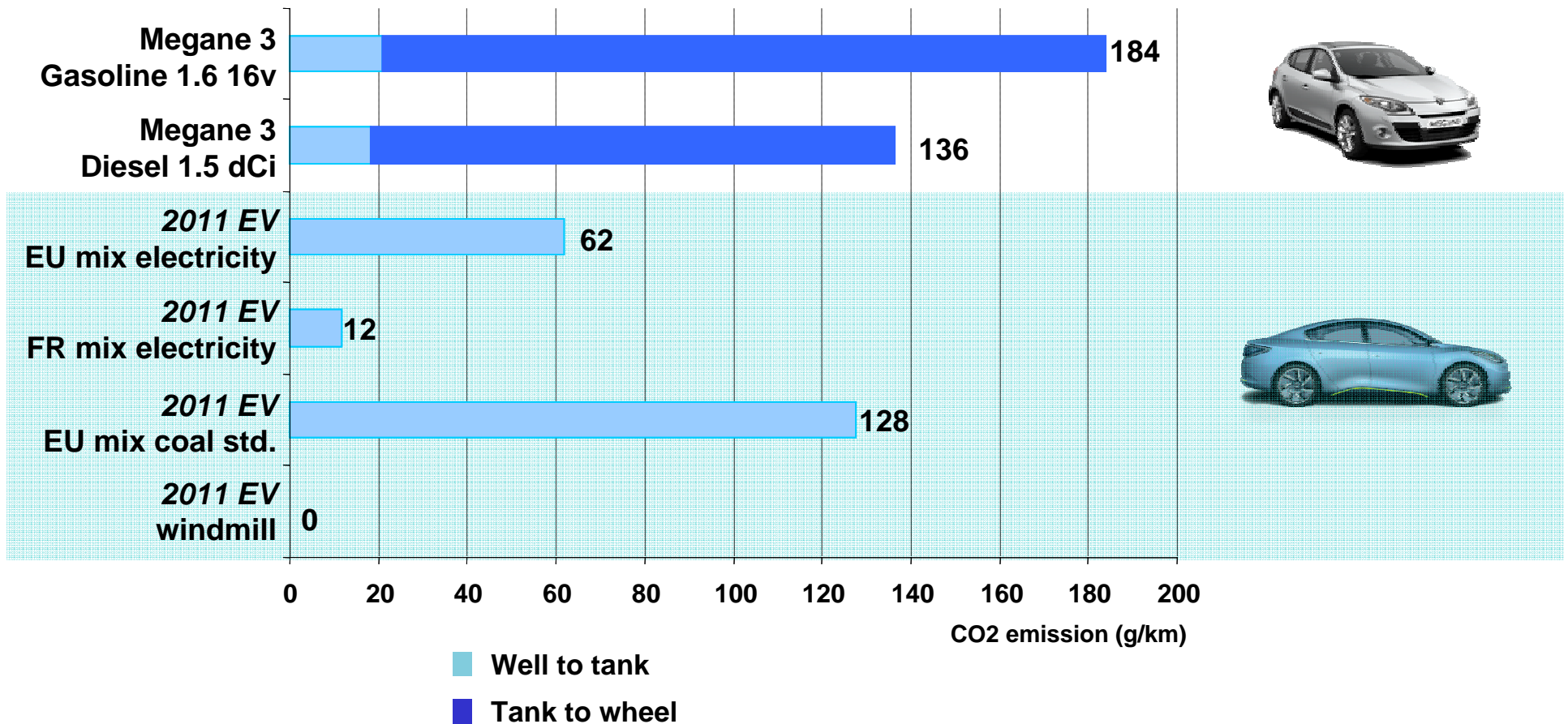
THE BREAKTHROUGH

100% electric vehicle, accessible to all ...



WHY THE ELECTRIC VEHICLE TODAY ?

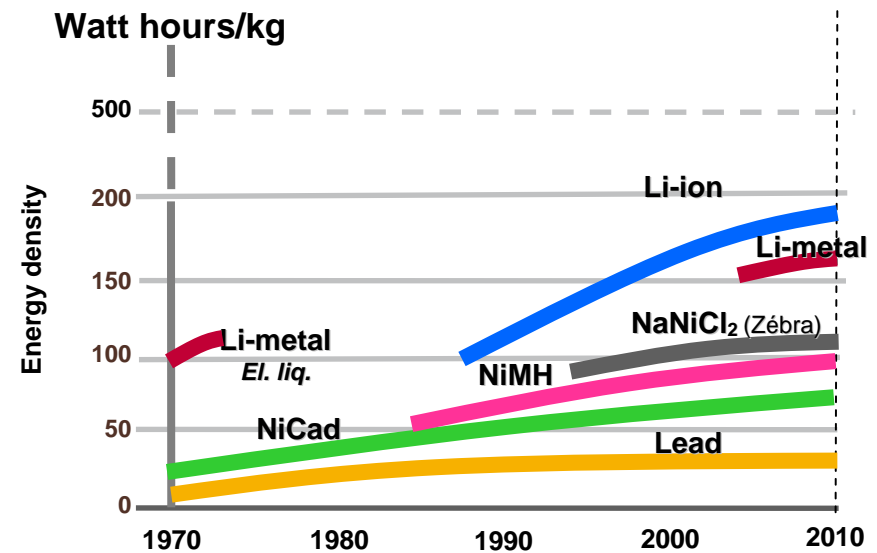
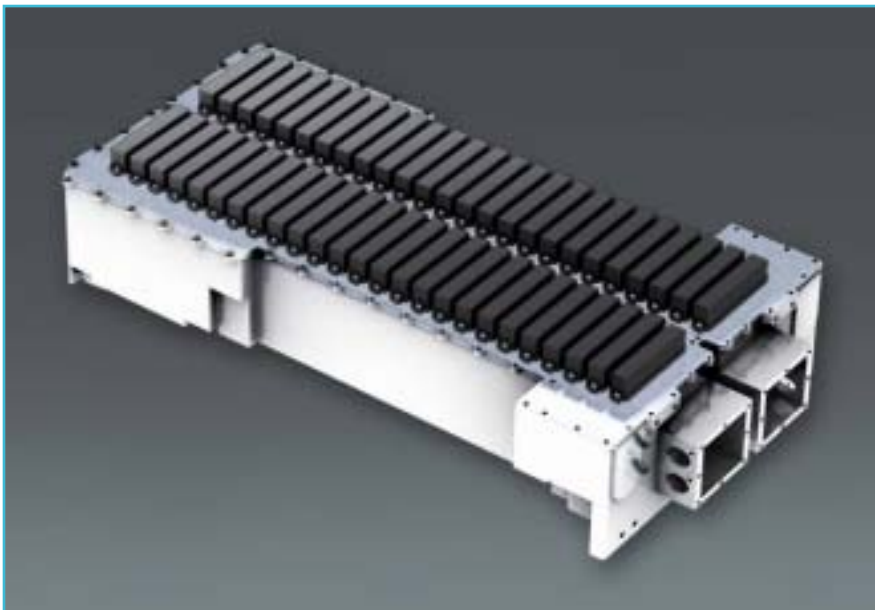
A real answer to curbing well-to-wheel CO2 emissions



WHY THE ELECTRIC VEHICLE TODAY?

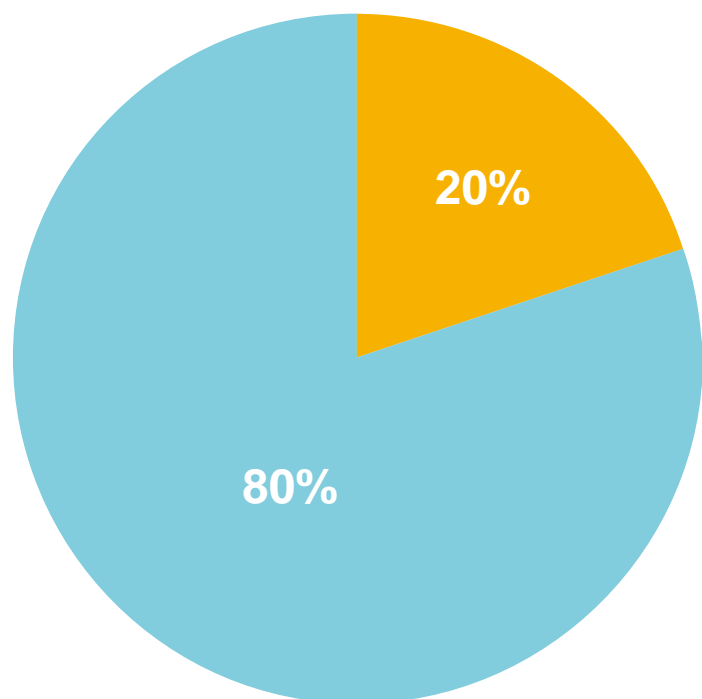
The technical breakthrough : Lithium-ion Batteries

- **New Lithium-ion batteries allowing :**
 - More Autonomy (160km)
 - More Performance (similar to ICE vehicles)
 - Charging every time you need
 - Safety

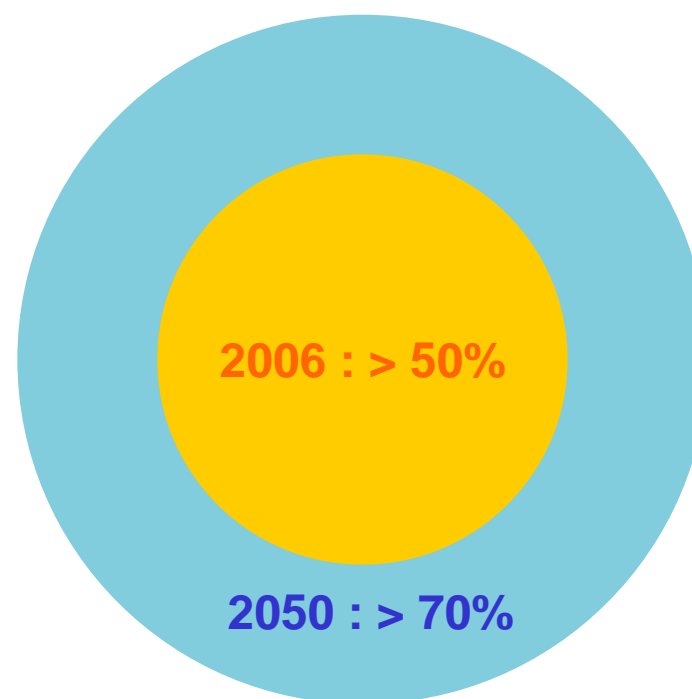


WHY THE ELECTRIC VEHICLE TODAY ?

Growing urbanization : EV fits a large share of mobility needs



80% of daily trips less than 60 km in Europe

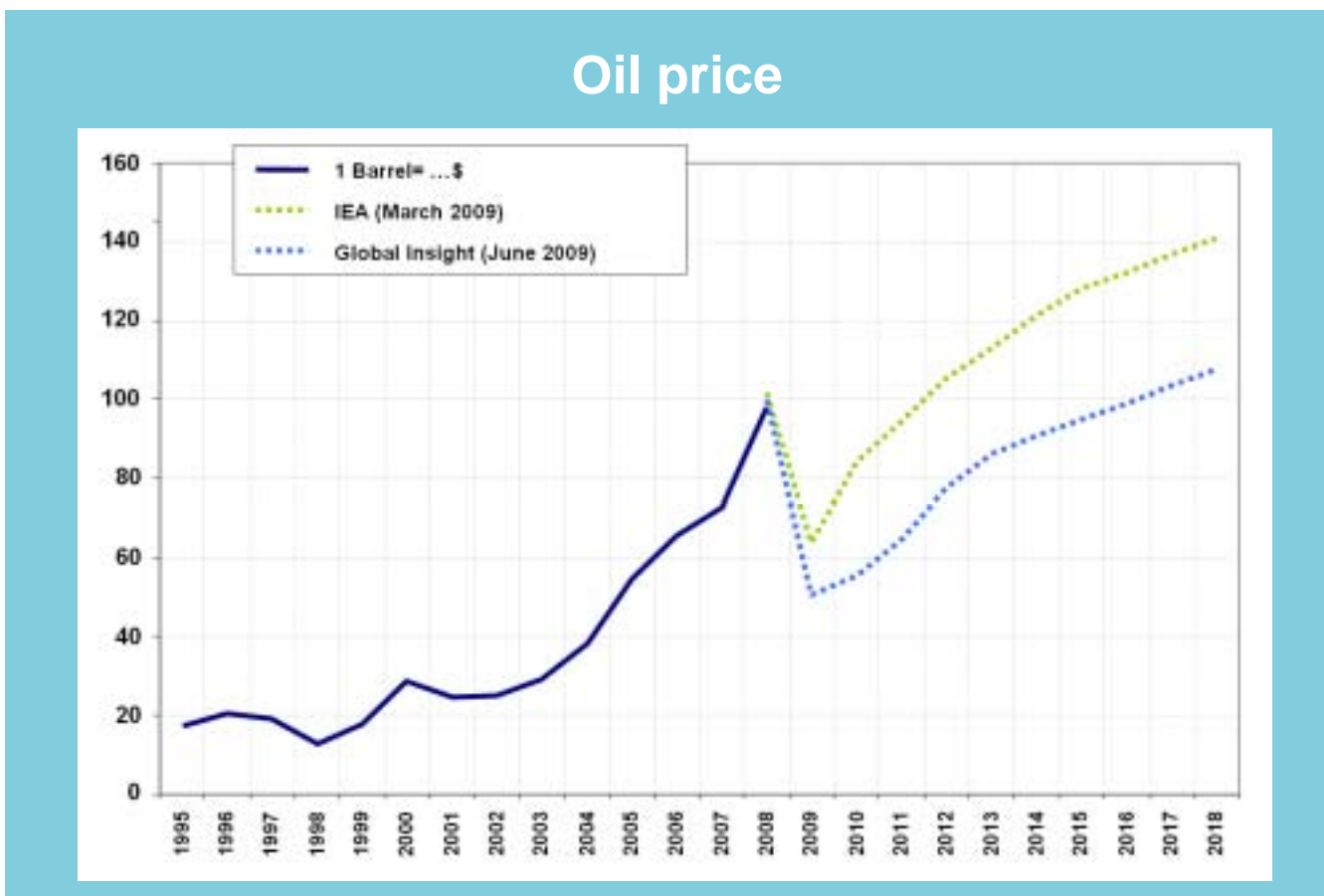


Increasing proportion of people living in urban area



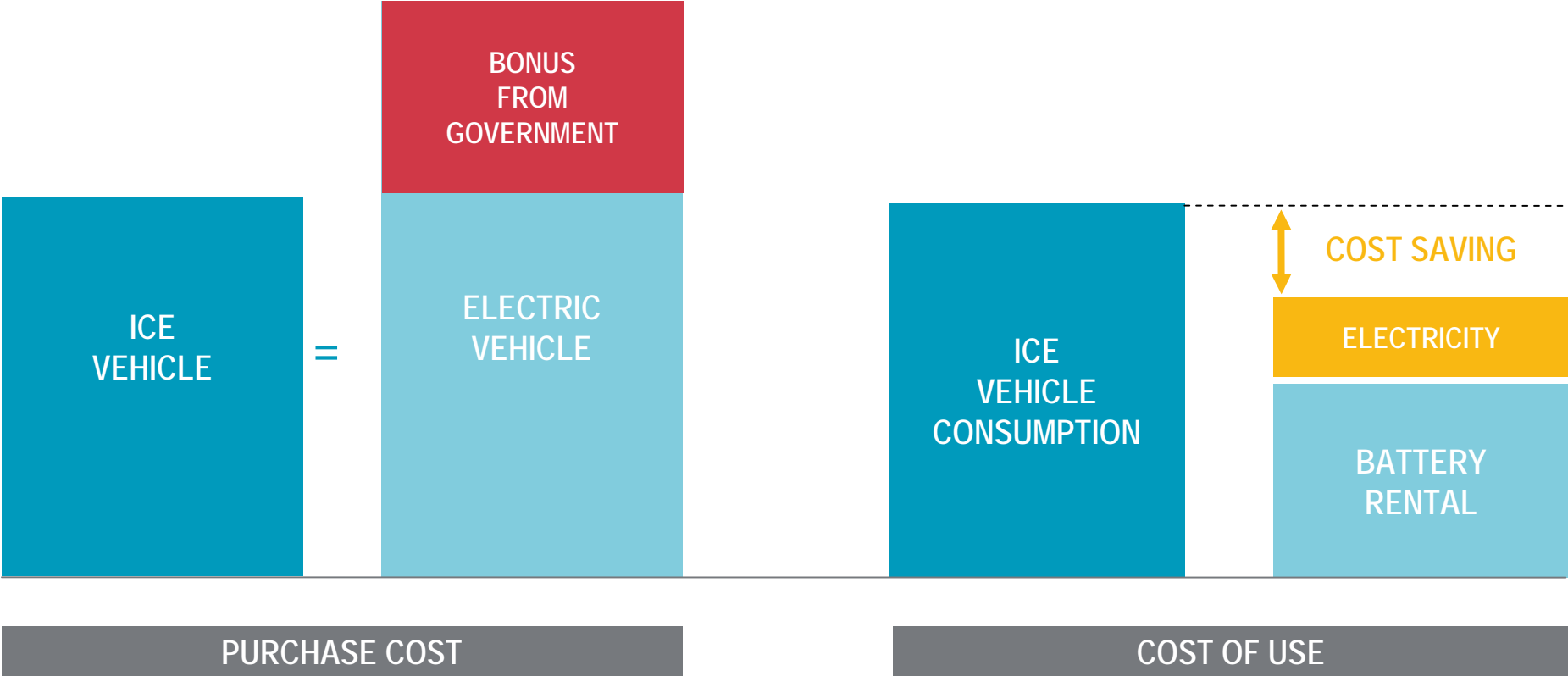
WHY THE ELECTRIC VEHICLE TODAY ?

Nations' motivation



WHY THE ELECTRIC VEHICLE TODAY ?

Economical Benefit for the customer

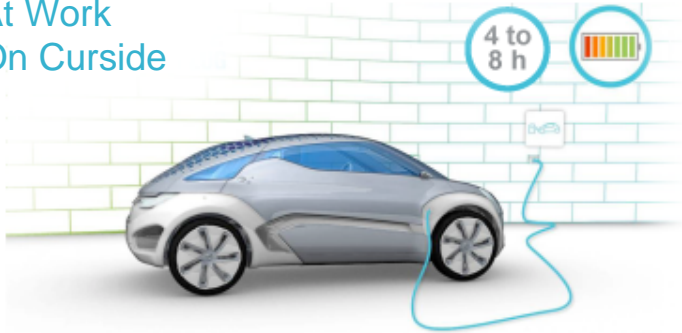


HOW THE ELECTRIC VEHICLE MODEL WILL WORK ?

A recharge network to be installed

1 Standard charge

- At Home
- At Work
- On Curside



3 Quick Drop

- A new battery in 3 min



2 Fast charge :

« Full charge in 30 min. »



4 Smart Navigation

- Locate & Reserve charge spots
- Optimize Trips



5:28 pm

150 km

Autonomy

2:06h - 184 km

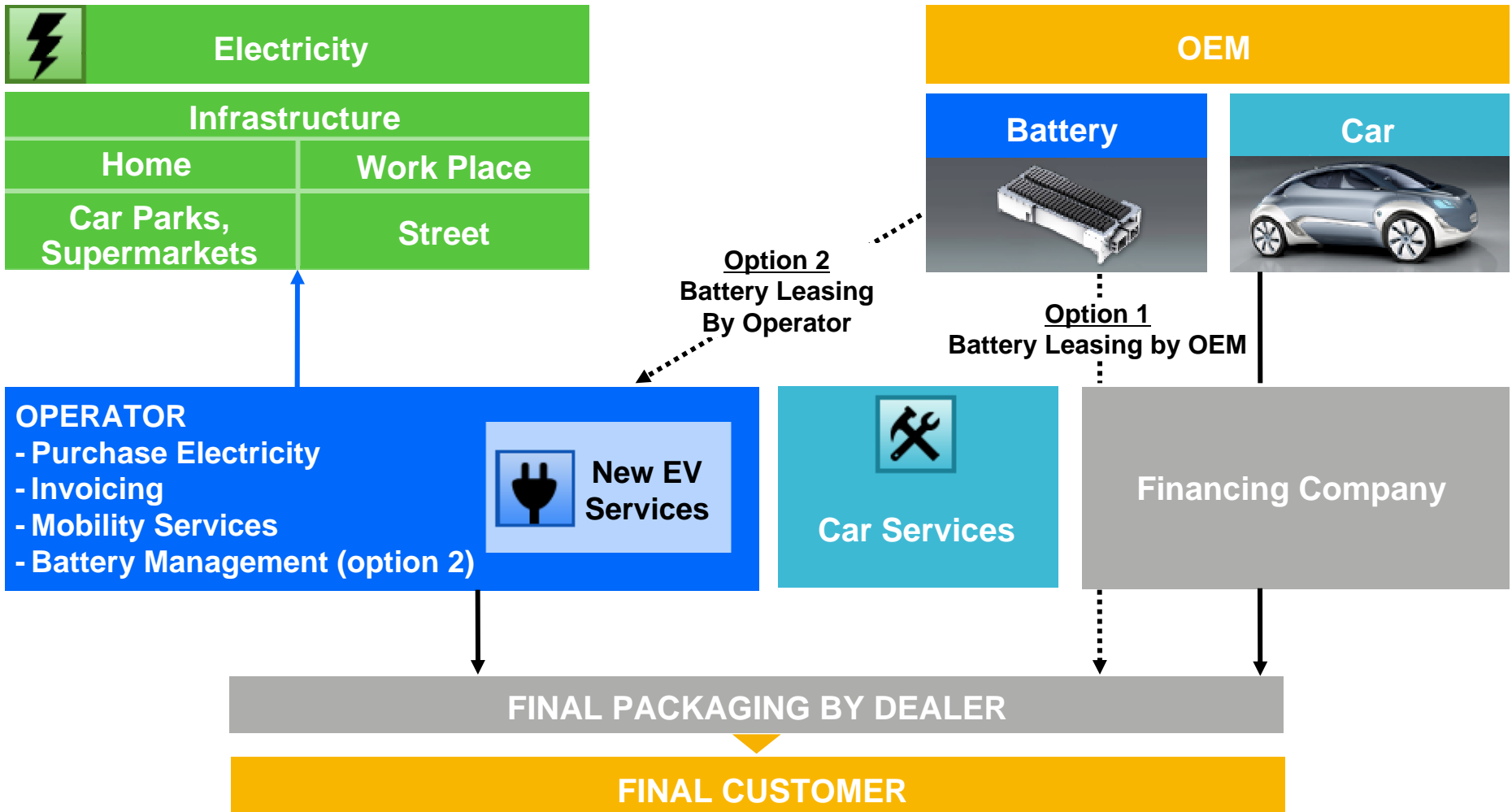


Charge Level



HOW THE ELECTRIC VEHICLE MODEL WILL WORK ?

New interfaces for customers



EV HOW MANY, HOW FAST

5 levers

- Oil price
- CO2 reduction pressure
- Cost of battery and EV technologies
- Availability of Infrastructure
- Changing consumer habits

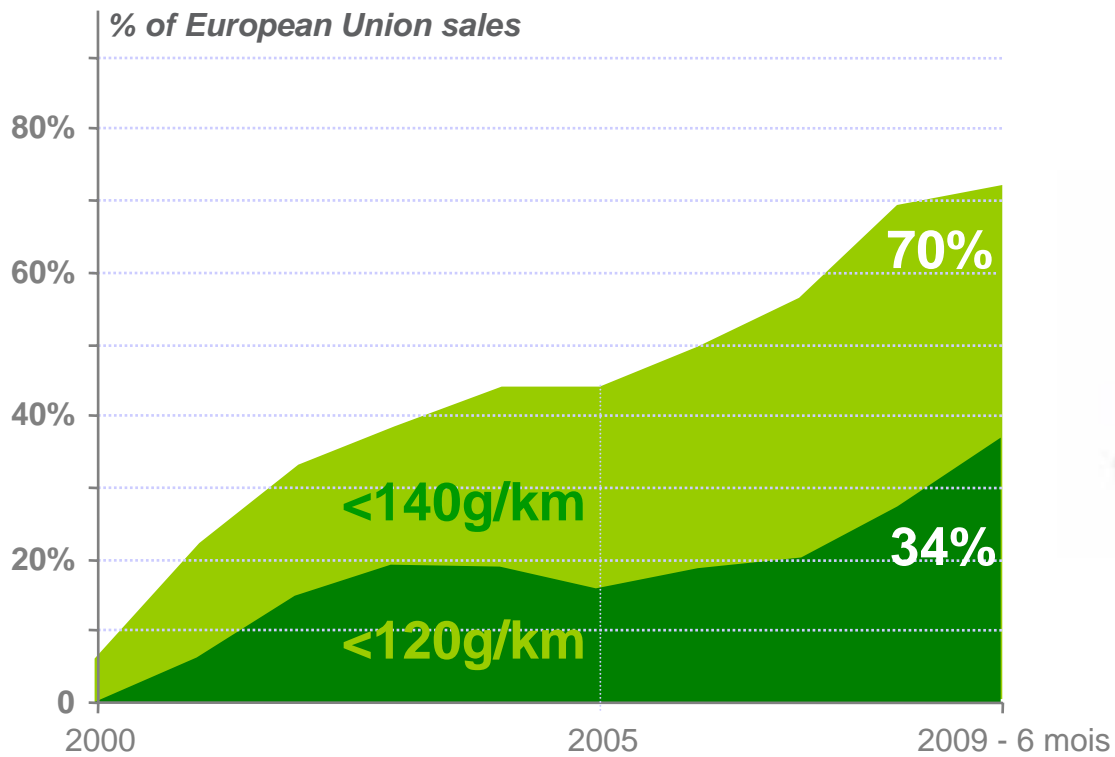
Potential annual market volume	
2016 3M cars	2020 6M cars



ALLIANCE AMBITION



RENAULT eco²



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