

BEV Strategy in China

16.03.2021 | Investor Conference

Disclaimer

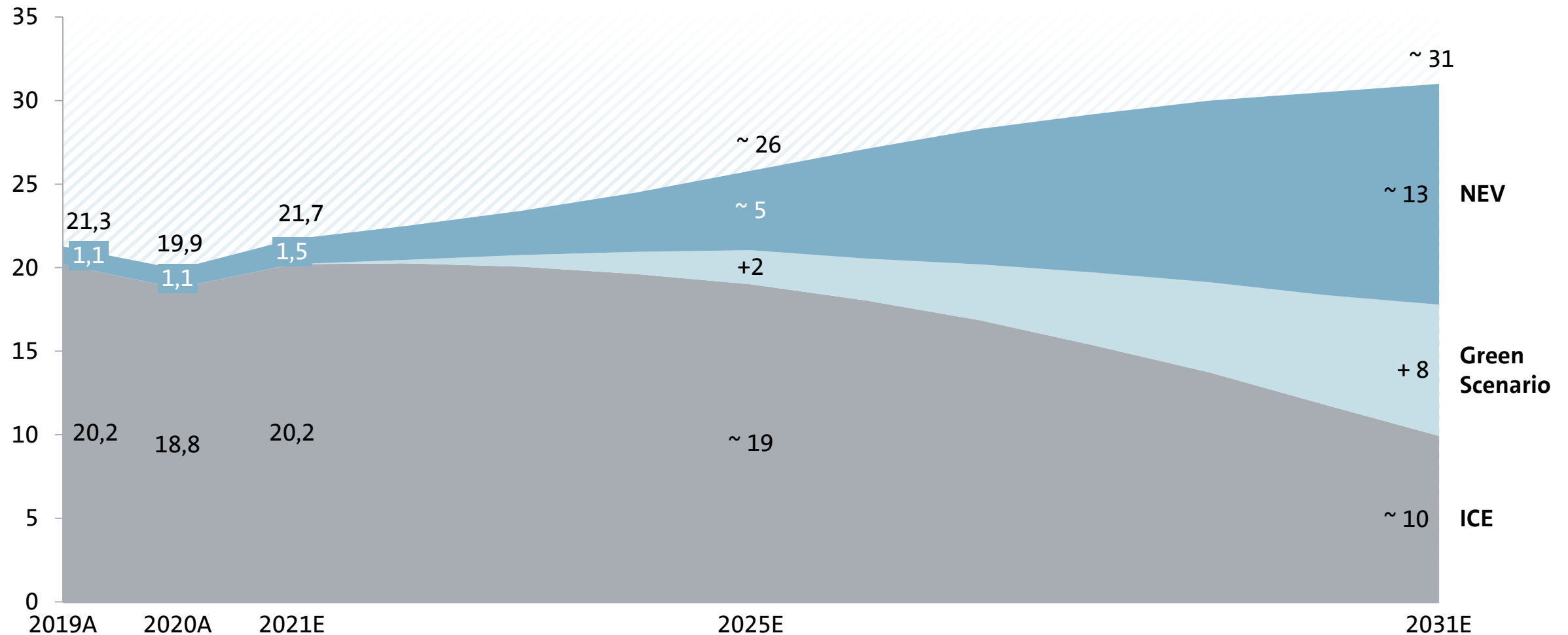
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China NEV market is expected to grow exponentially in the next decade

Volume [in mn]








Source: VGC database

Expand NEV footprint in China across all entities using all platforms

	一汽-大众 FAW-VOLKSWAGEN	上汽大众 SAIC VOLKSWAGEN	大众安徽 VOLKSWAGEN ANHUI	Audi FAW NEV Co., Ltd.
MQB 	Bora BEV Golf BEV Tayron PHEV Magotan PHEV 	Tharu BEV E-Lavida Tiguan PHEV Passat PHEV 		
MLB 	A6L PHEV e-tron ... 			
MEB Capa. 900 Tsd. 	ID. Family ... 	ID. Family ... 	(SOP 2023) 	
PPE Capa. 300 Tsd. 				(SOP 2024) 

Our NEV portfolio is expected to grow to 30+ locally-produced models* until 2030

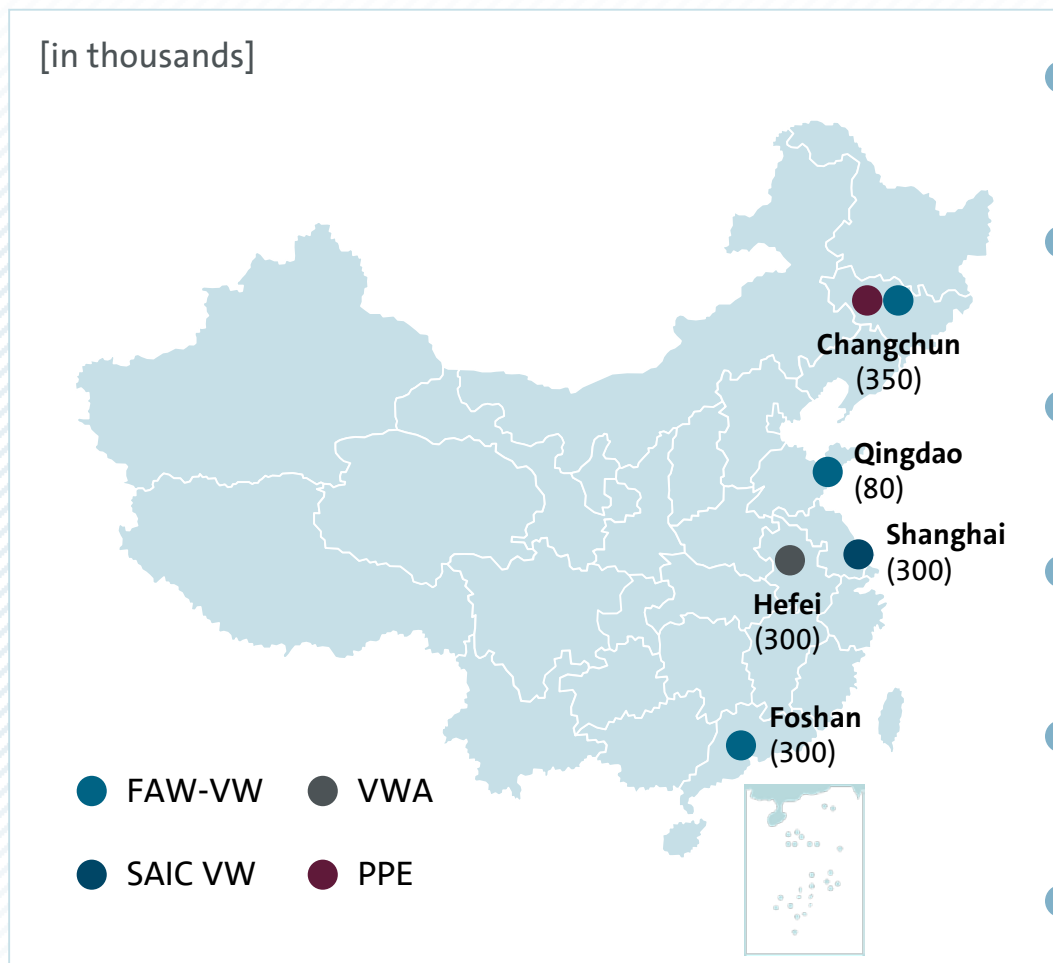
	2021	2025 (est.)	2030 (est.)	
 Total CN market	21.7 mn	25+ mn	30+ mn	
 CN NEV market share	>5%	>25%	>50%	
 VW China NEV models	10+	20+	30+	
Details by brands		10	12	19
		3	6	9
	<i>Other brands</i>	--	2	5
	VOLKSWAGEN GROUP CHINA	13	21	32



Source: VGC database

*Without import vehicles

Enable NEV growth plan with ambitious ramp-up of battery and production capacity



NEV production capacity is expected to be ramped up to > **1.0 mn** by 2025

Continuously growing **battery cell demand**

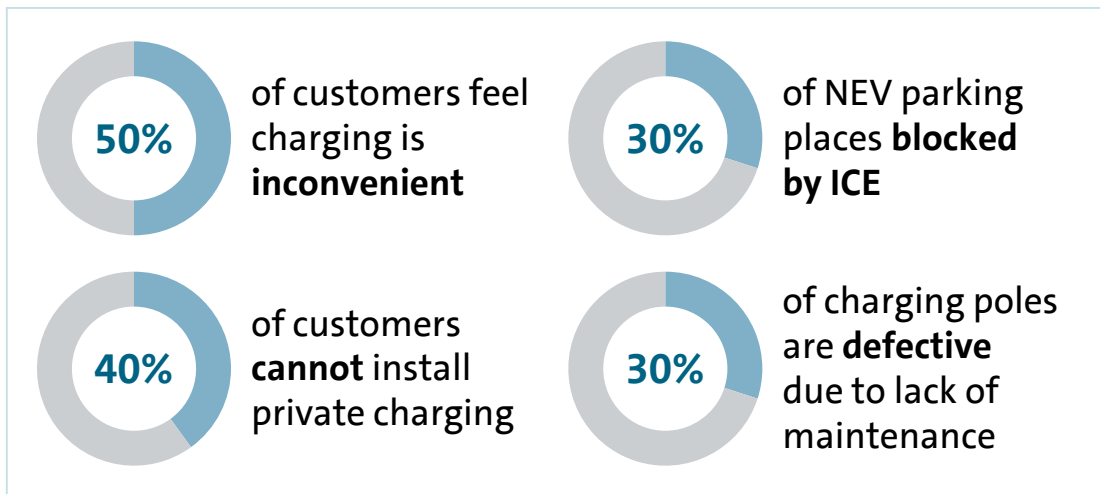
Partnering with **Gotion High-Tech**


Ongoing cooperation with **local suppliers**

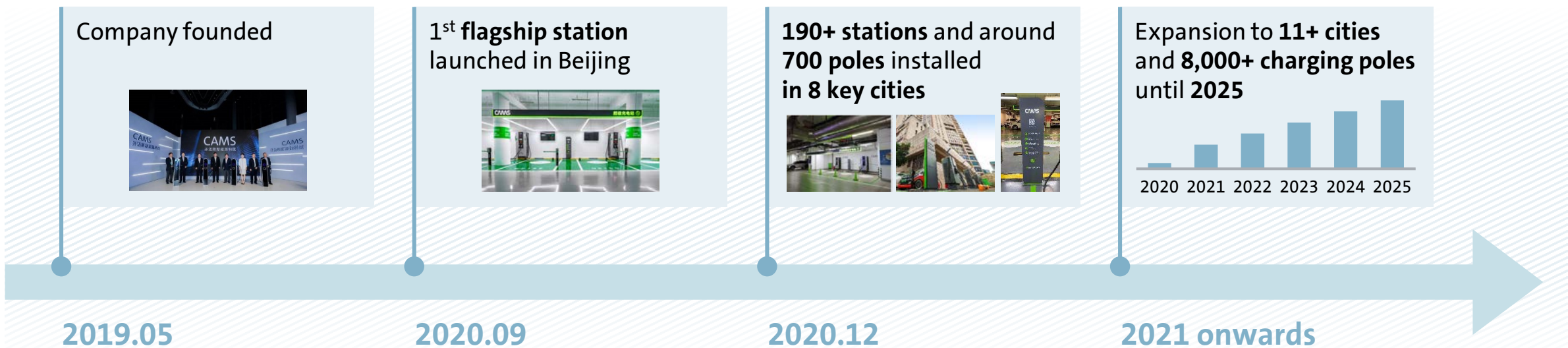
Staggered approach to **build up partnerships**

Continuous **supplier qualification** according to **Volkswagen standards**

Actively tackle customer concerns around charging



- **CAMS** (“Charging as Mobile Service”)  founded with 3 partners: **FAW Group, StarCharge and JAC**
- Aims to provide **first-class, convenient** charging services
- Provides both **public charging stations** and home-based **wall-boxes**



With NEV development running alongside trend towards an ICV*, we are strengthening our R&D capabilities within our R&D network...

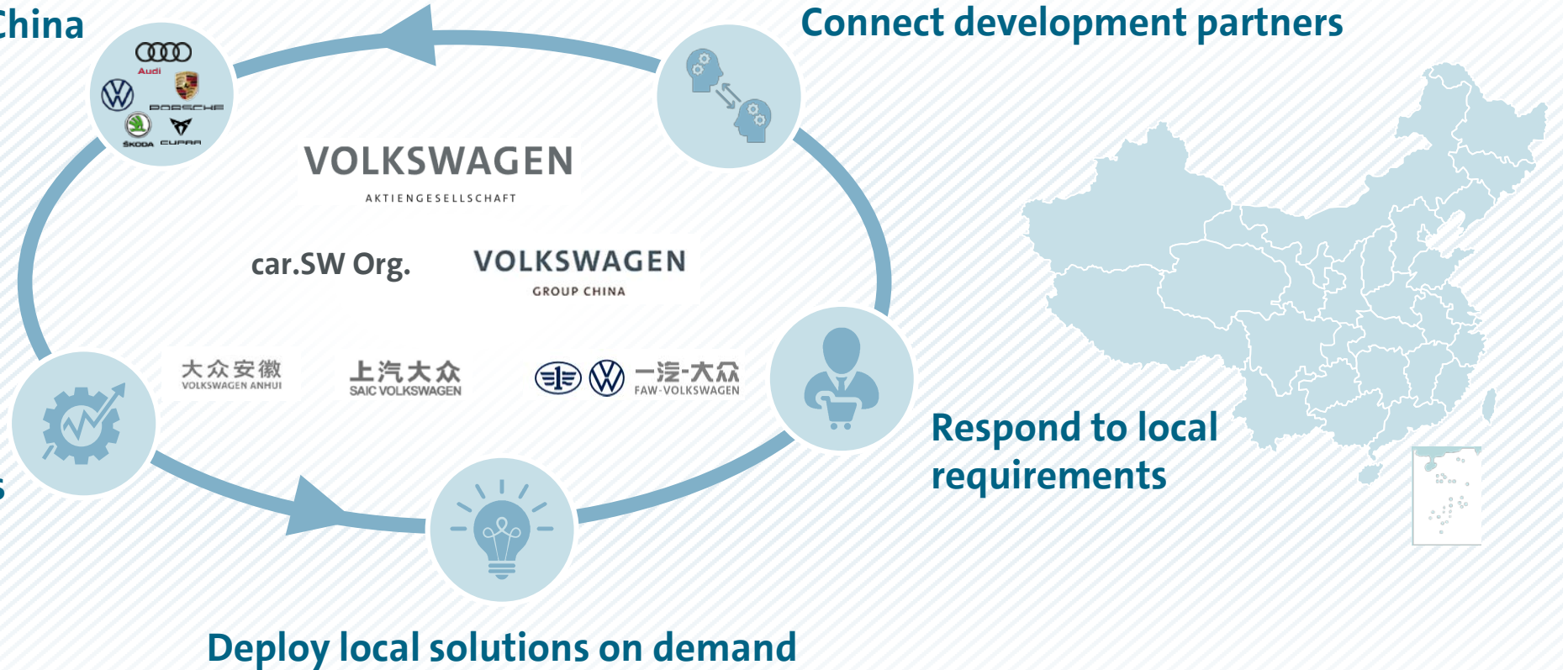
Strengthen brands in China

Connect development partners

Realize synergies

Respond to local requirements

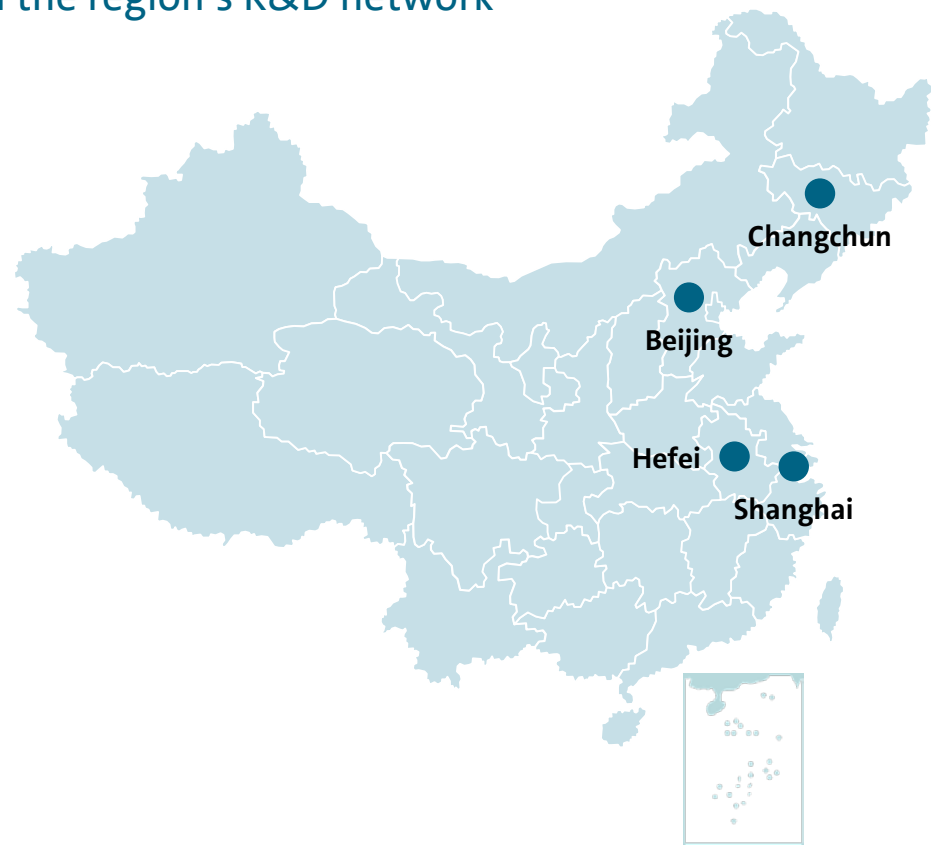
Deploy local solutions on demand



*Intelligent connected vehicle

... and working with strong technology partners In China, For China.

Cooperation in the region's R&D network



Competencies in new technology areas



Volkswagen Group is pursuing a holistic strategy that enables a successful transformation towards intelligent, connected e-mobility

We invest in

Today



Pure-electric companies

- VW Anhui
- Audi FAW NEV Co., Ltd.



Battery production

- Gotion High-Tech



Charging infrastructure

- CAMS



R&D capabilities

to ensure

By 2030



>2 mn units
sales annually



~12 mn
pure-electric car parc
from Volkswagen
Group China