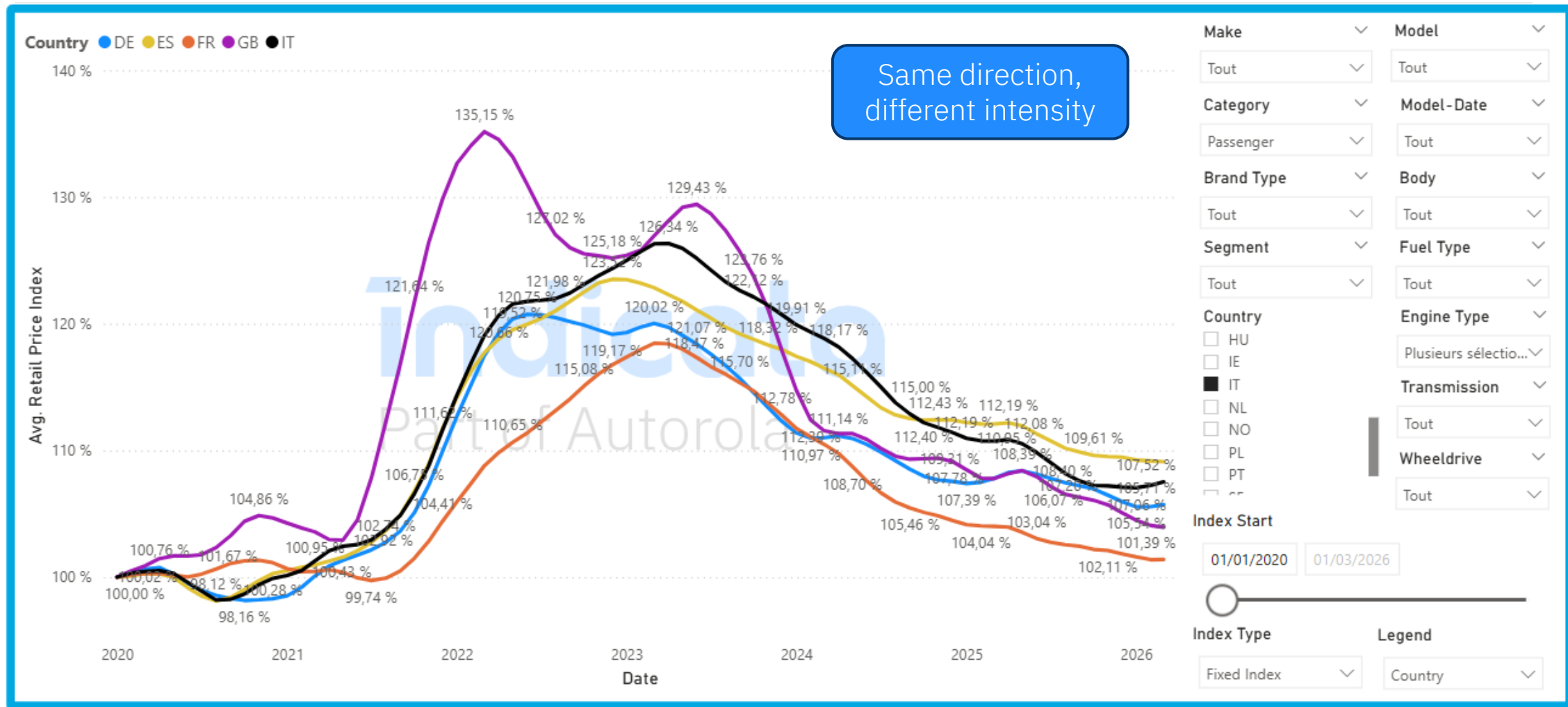


Navigating a Regulation-Driven UK Automotive Market

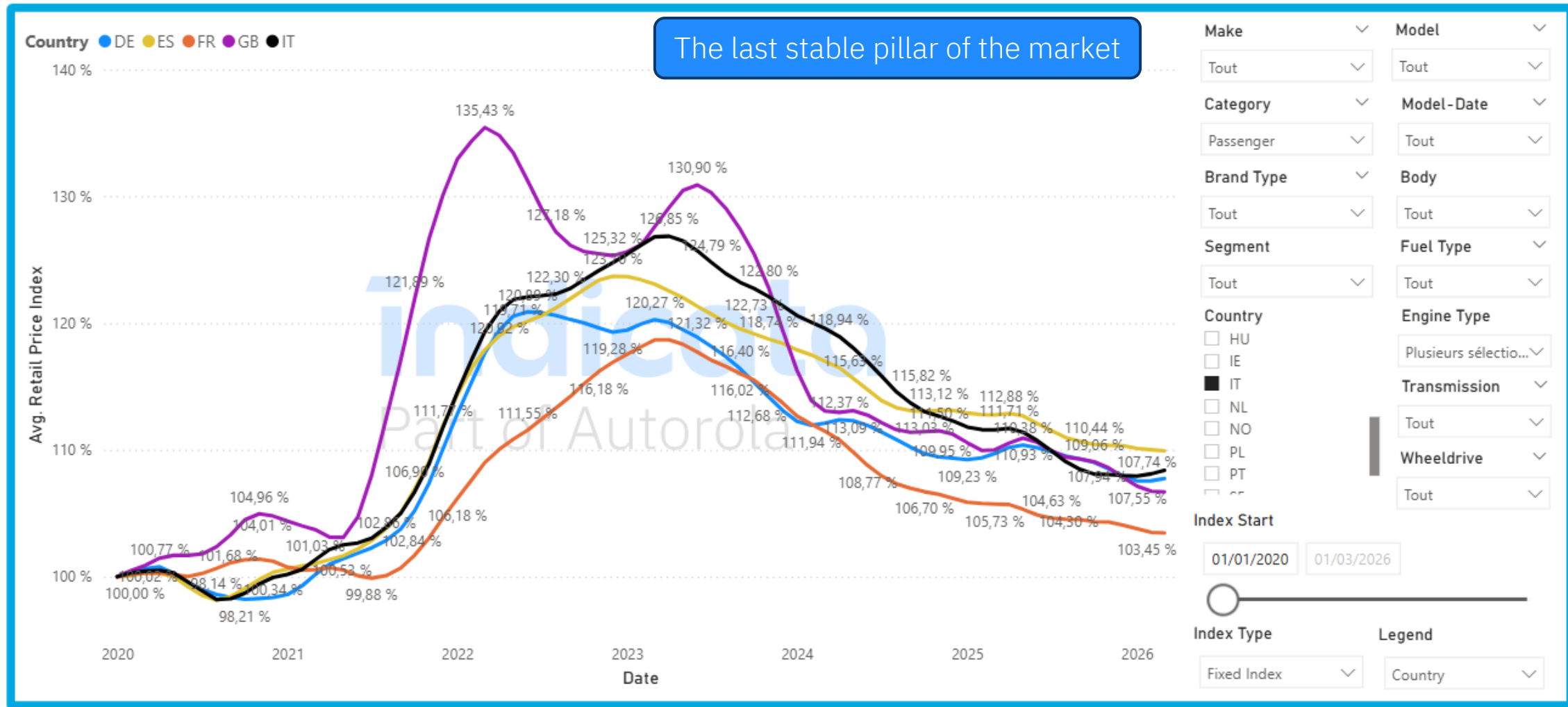
*Pricing pressure, BEV imbalance and growing
risks on residual values*



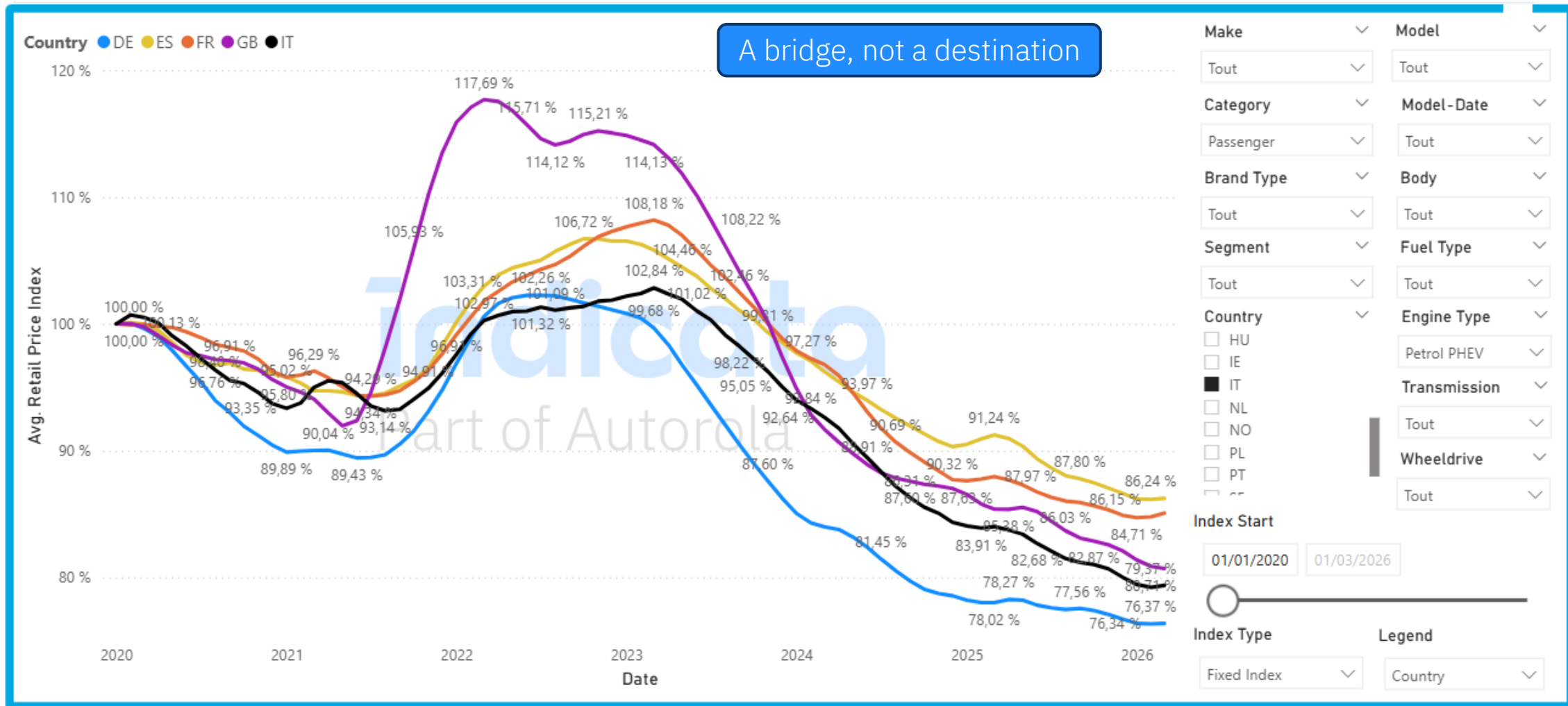
UK vs G5 – A common trend, different reality



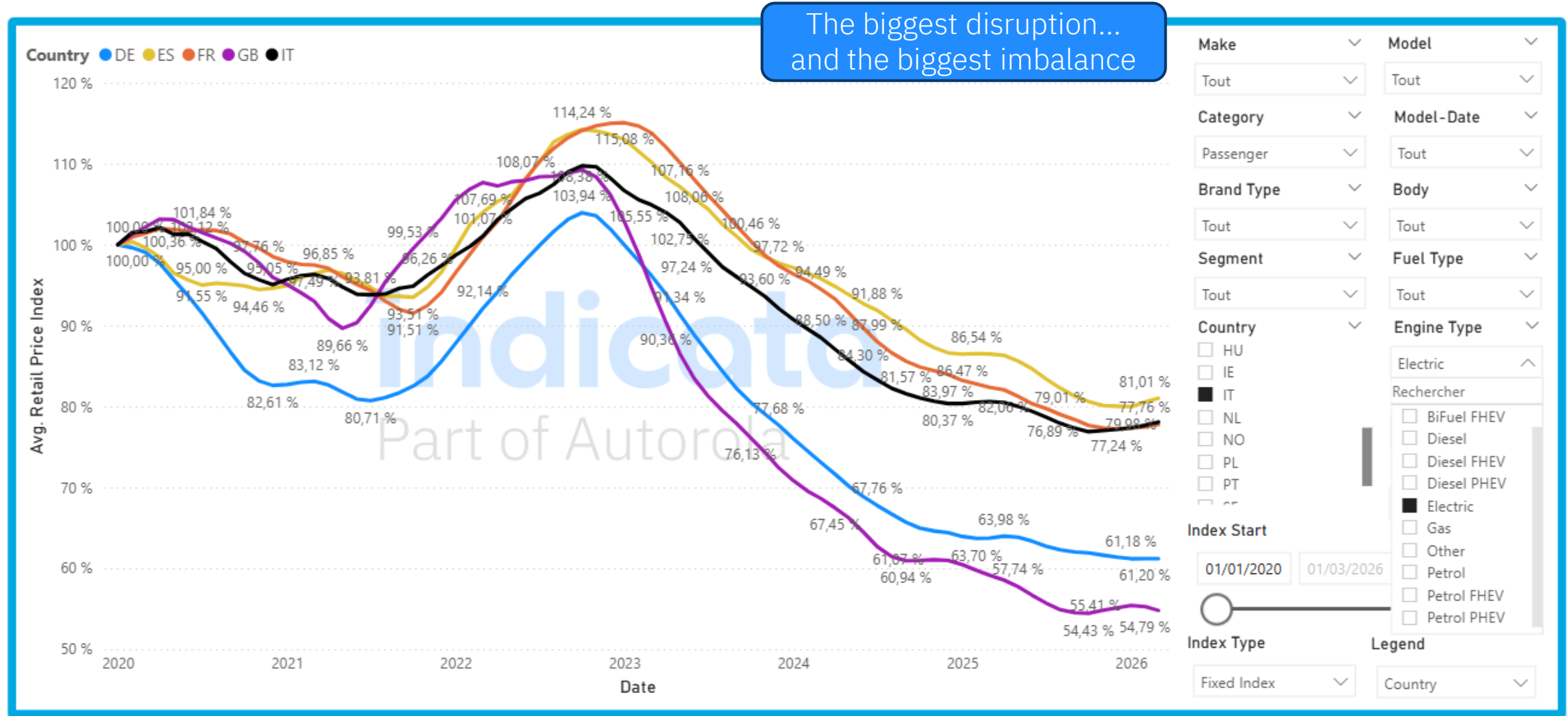
ICE – Stability across markets



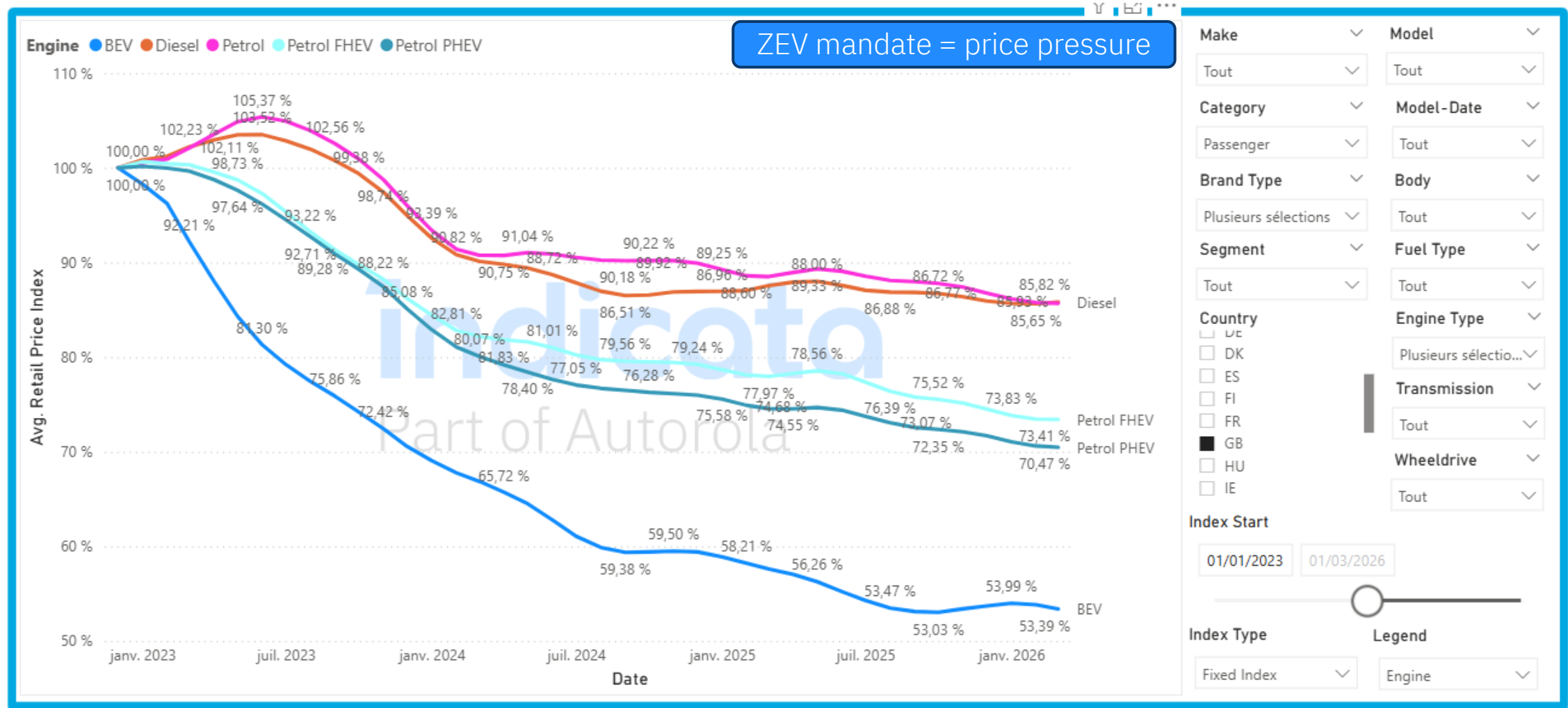
PHEV – A transitional segment



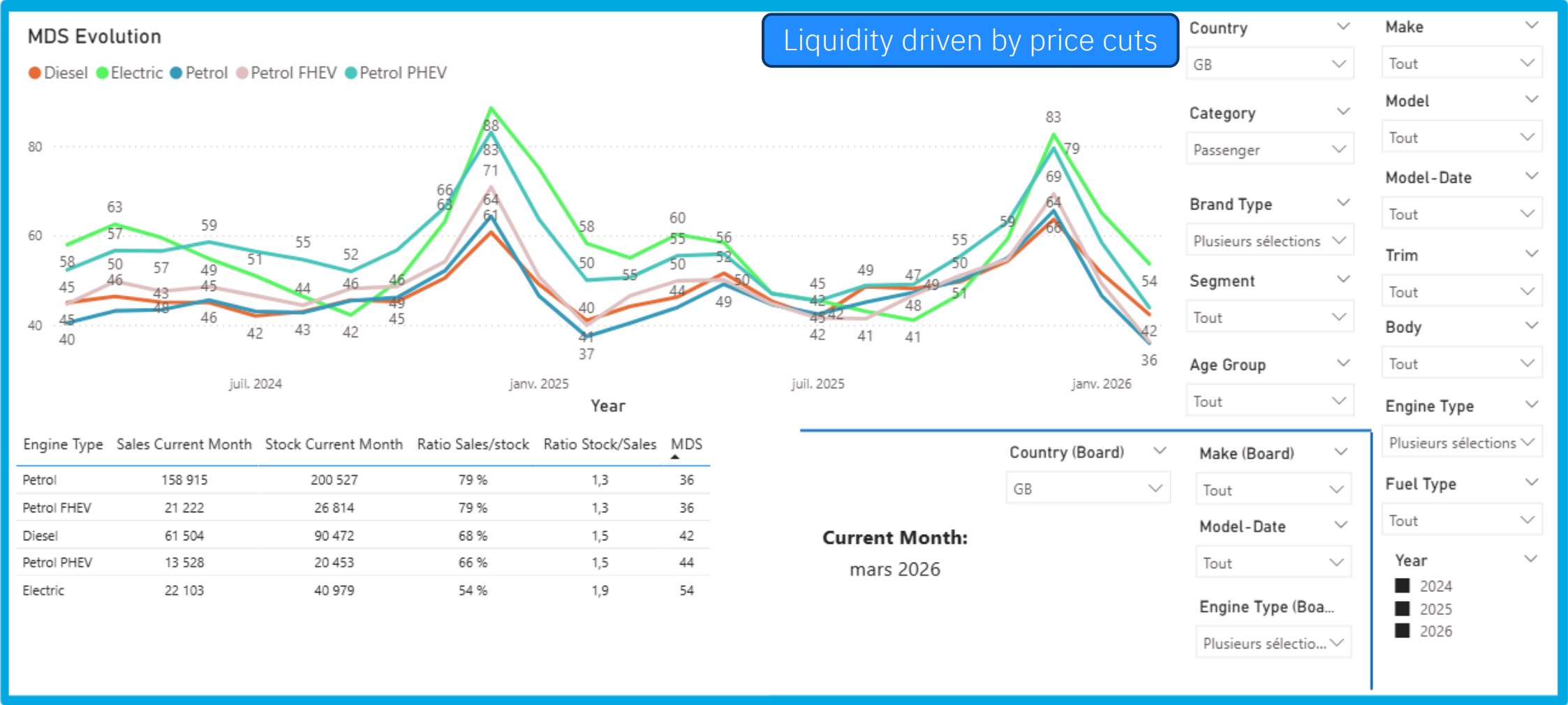
BEV – A fragmented market



UK Pricing – BEV under pressure



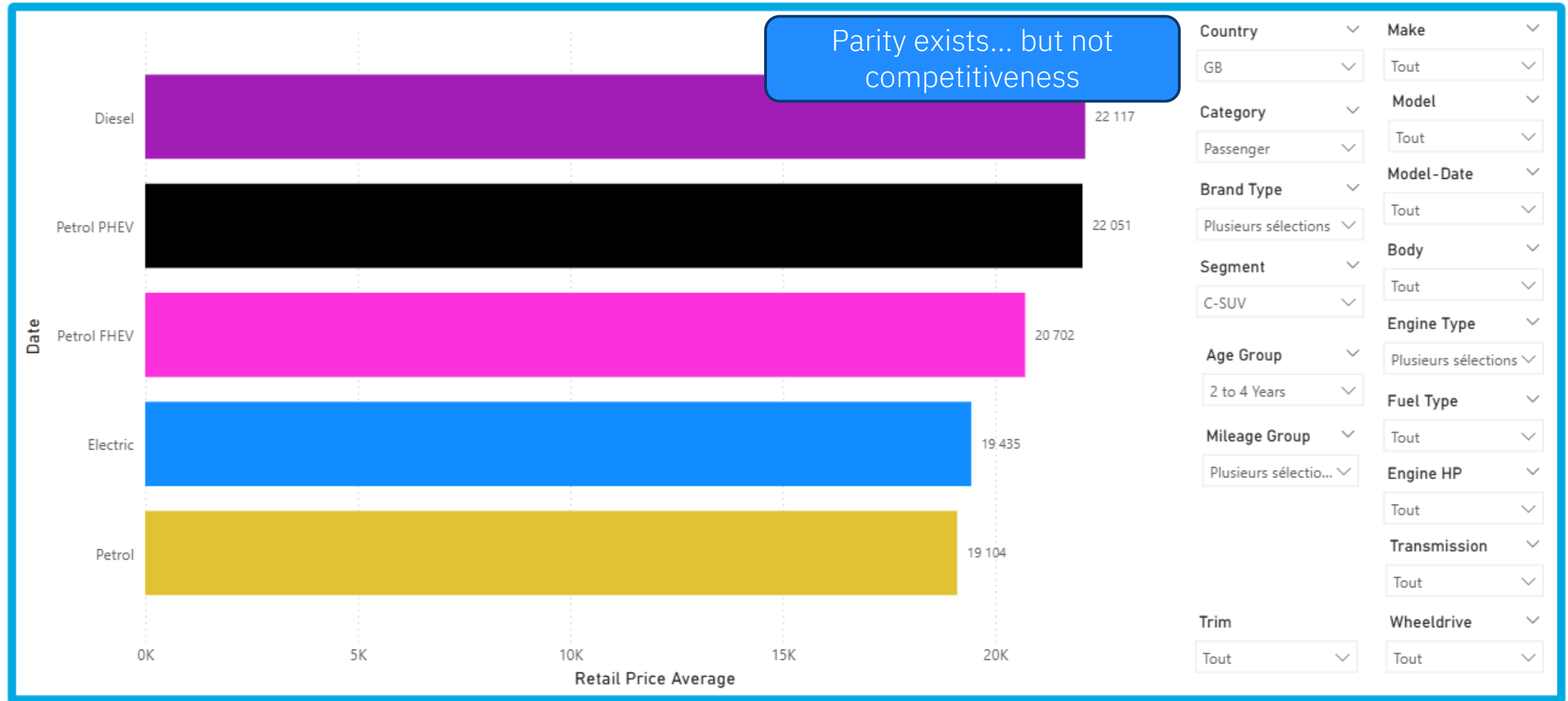
Supply vs Demand – Artificial balance



indicata

Part of Autorola

BEV vs ICE – The parity illusion

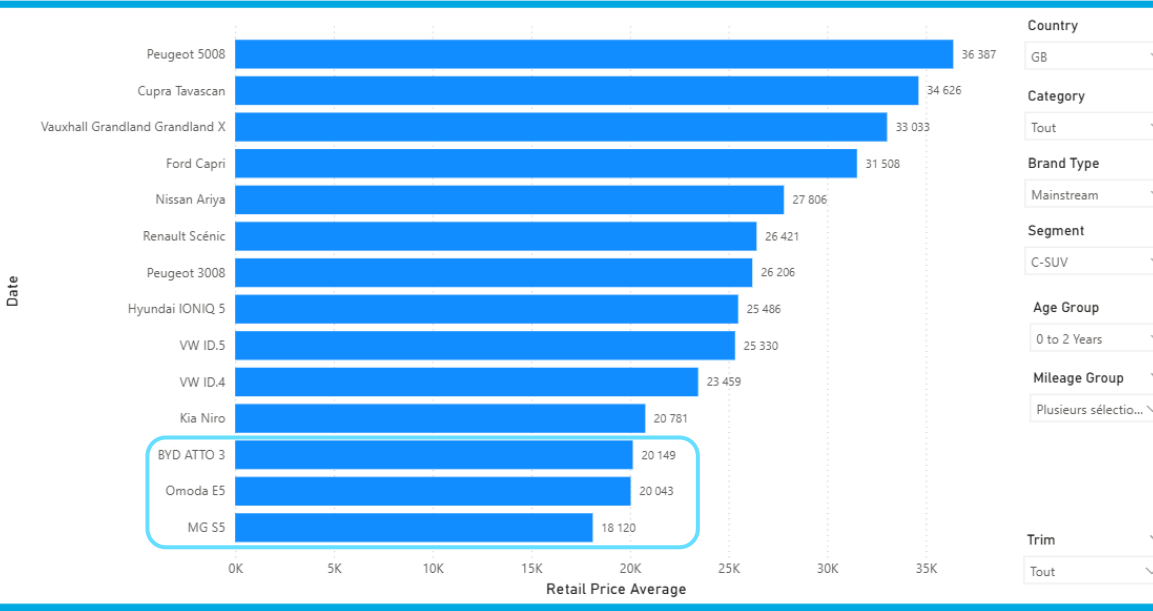


Chinese OEMs and the New BEV Price Floor



12 months – 18 650 Miles

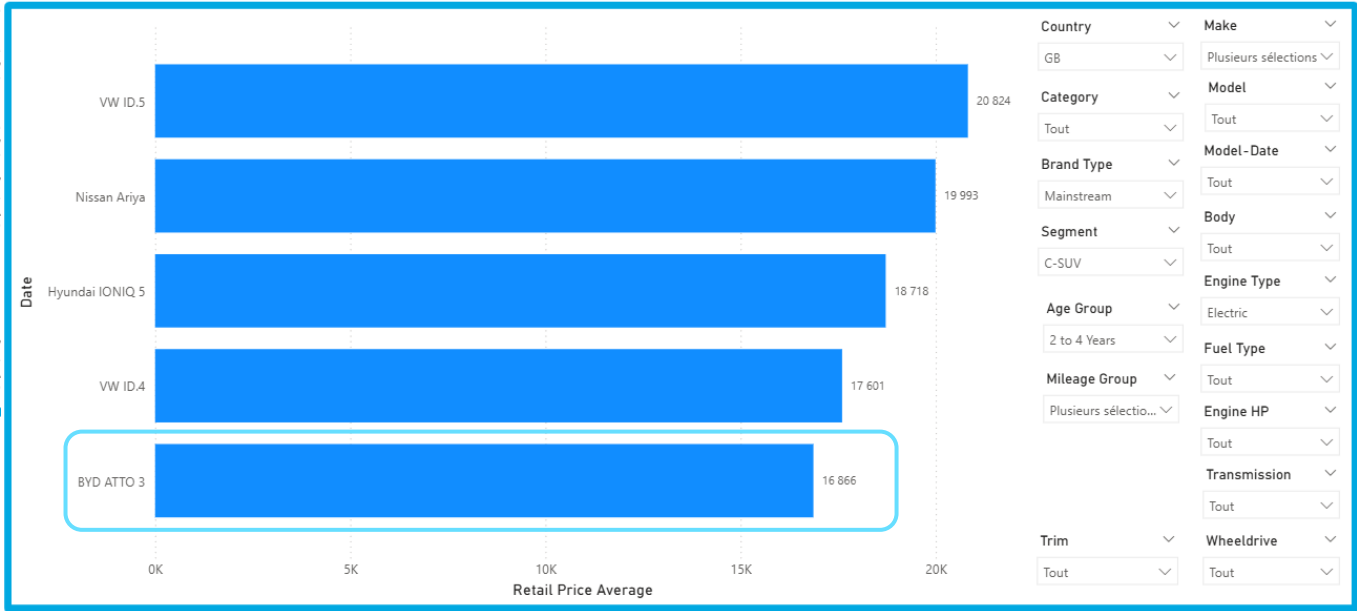
RETAIL PRICE COMPARISON (Local Currency Unit)



Chinese OEMs crystallise
the price floor

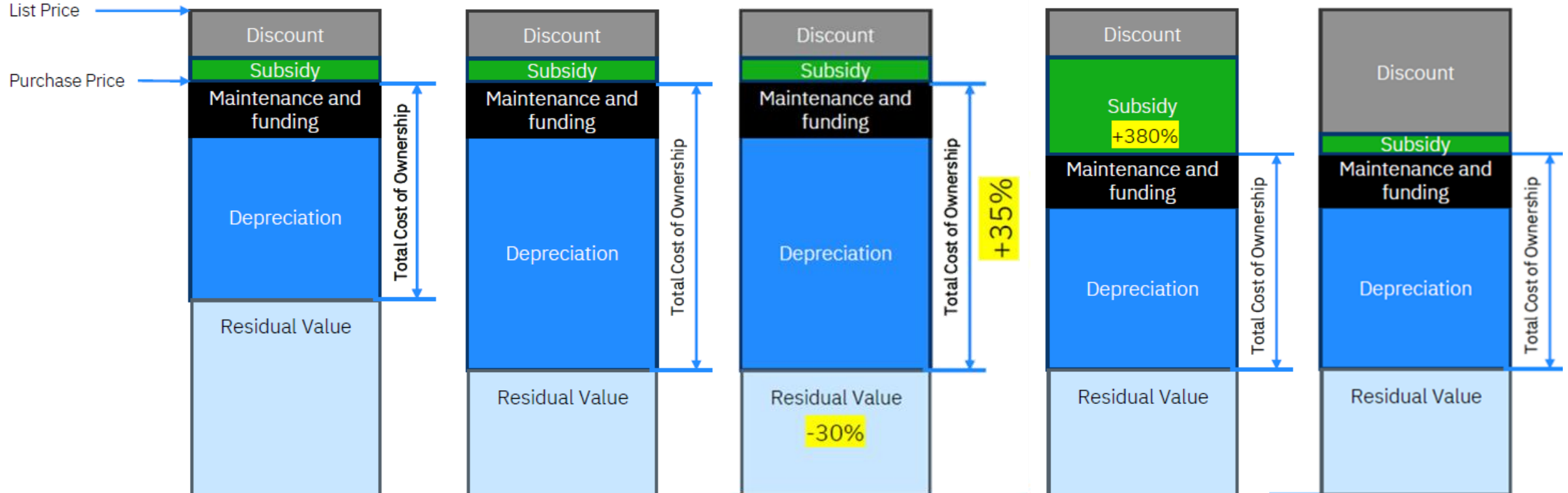
36 months – 37 300 Miles

RETAIL PRICE COMPARISON (Local Currency Unit)



Residual Values – The hidden risk

competitiveness is
financed by tomorrow's



The challenge is no longer growth, it's sustainability

UK Market driven by regulation

BEV under structural pressure

Profitability at risk

Q & A



Thank you

