



# **NISSAN INTELLIGENT MOBILITY FORUM**

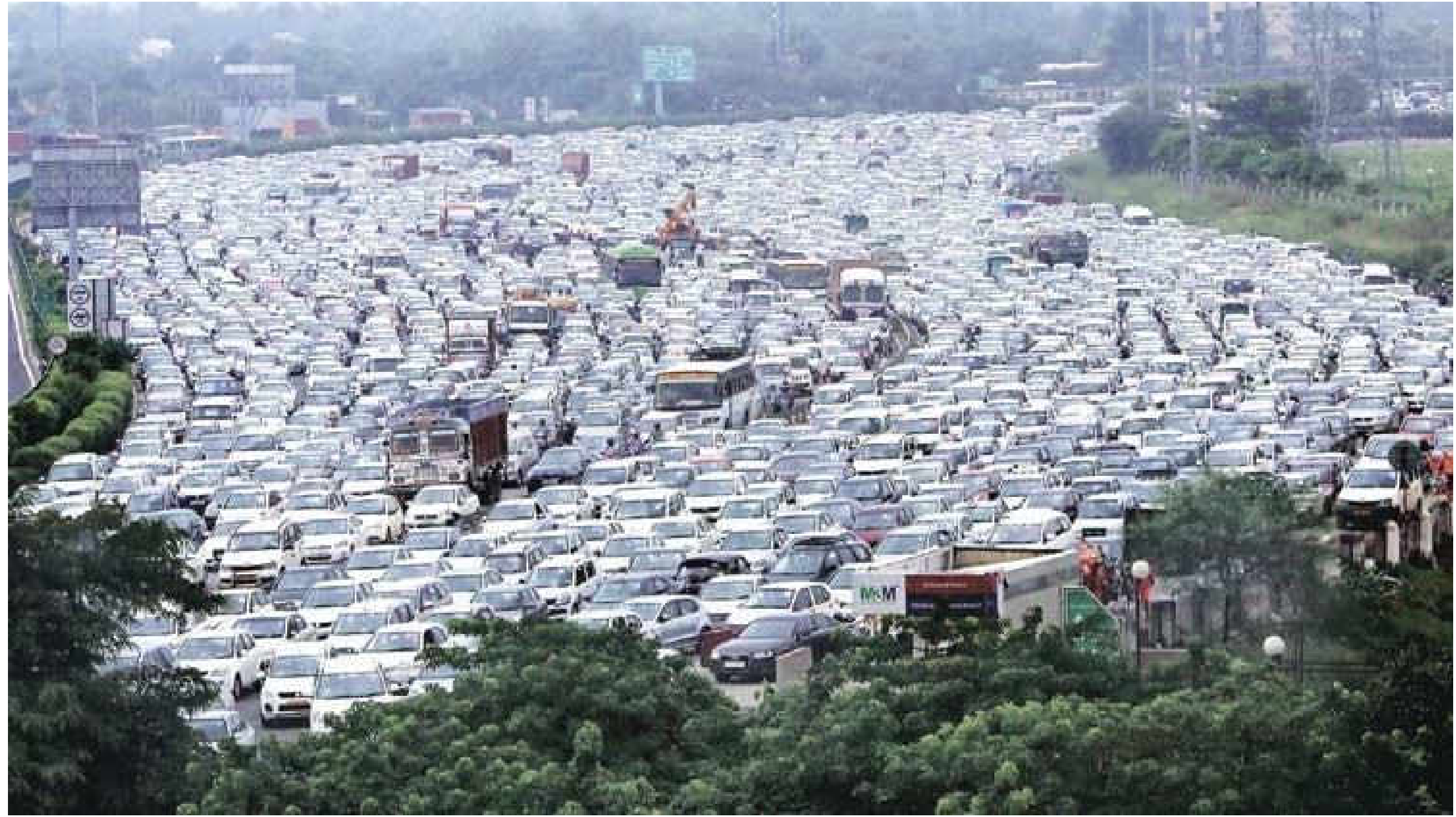
**OEIRAS – FEB 7<sup>th</sup> 2018**

PONZ M. PANDIKUTHIRA

VP, PRODUCT PLANNING & ADVANCED PRODUCT STRATEGY

NISSAN EUROPE







**>30%**

**EFFICIENCY**

**1.25M**

**DEATHS**

**INTELLIGENT?**

**80M**

**CARS SOLD**

**10%**

**UTILISATION**



# THINGS WILL GET WORSE UNLESS WE MAKE FUNDAMENTAL CHANGES

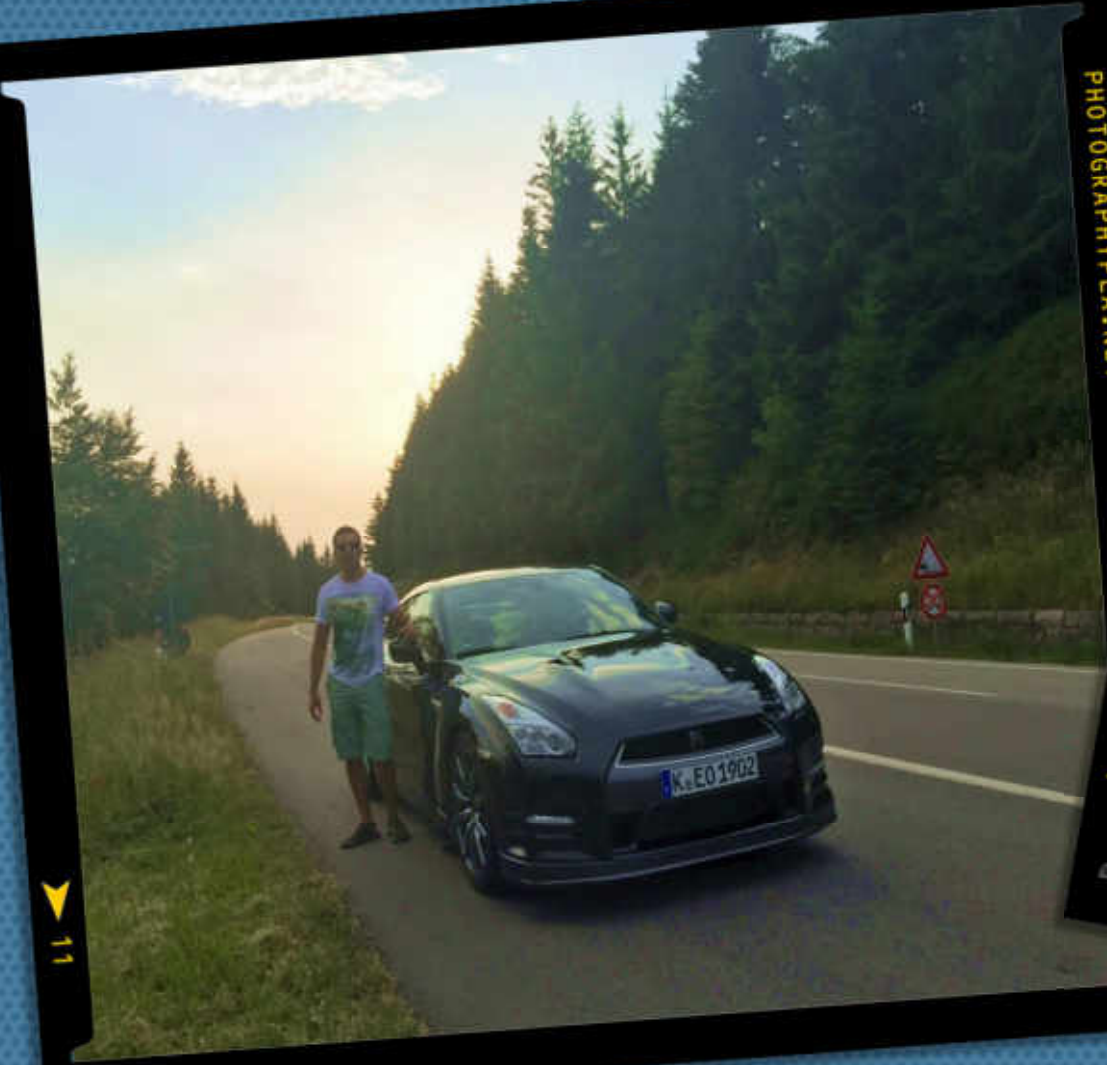
- **Efficiency**
- **Safety**
- **Sustainability**

INTELLIGENT MOBILITY



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PHOTOGRAPHYPLA.NET

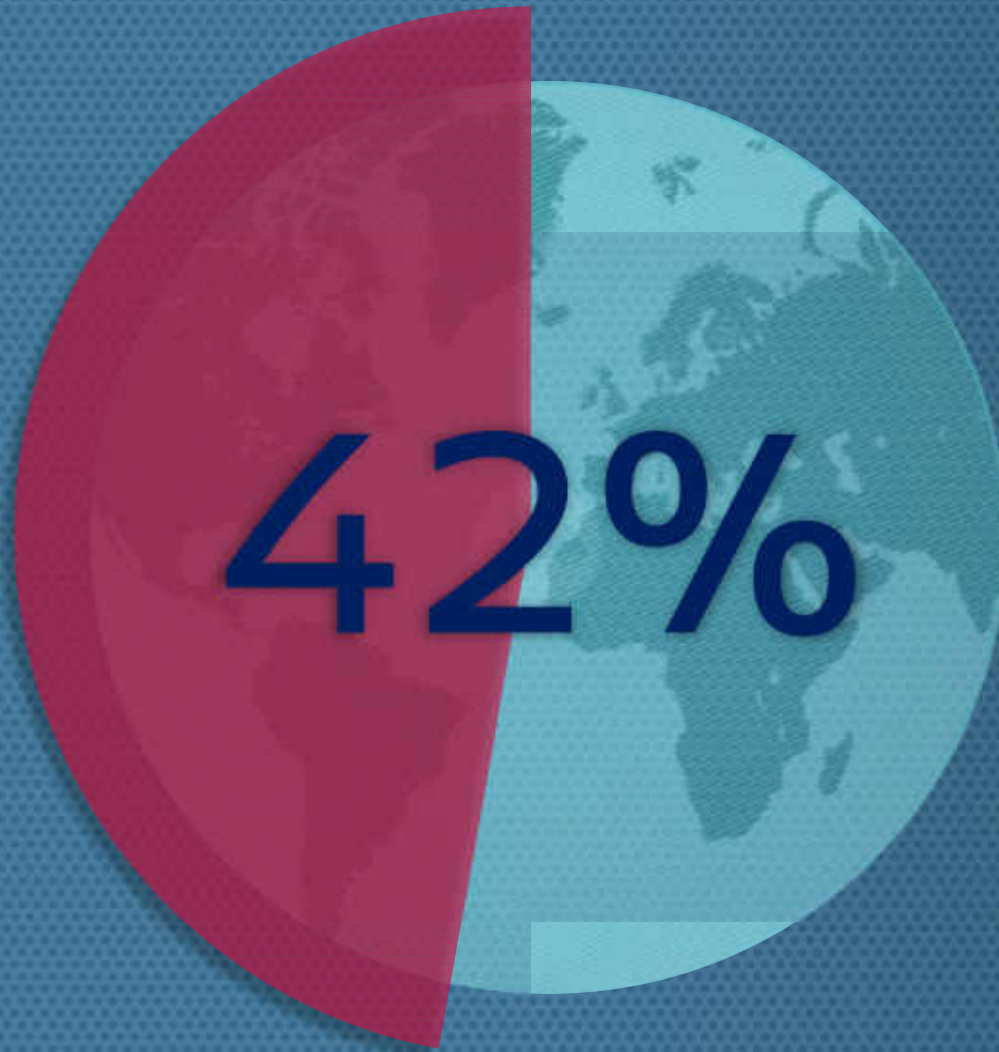
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**WHAT WILL DRIVE THE  
PROBLEM? ...**

**AND EVENTUALLY THE  
SOLUTION**





**MIDDLE CLASS BY 2020**



**68%**

**CHINA**

**62%**

**INDIA**

**66%**

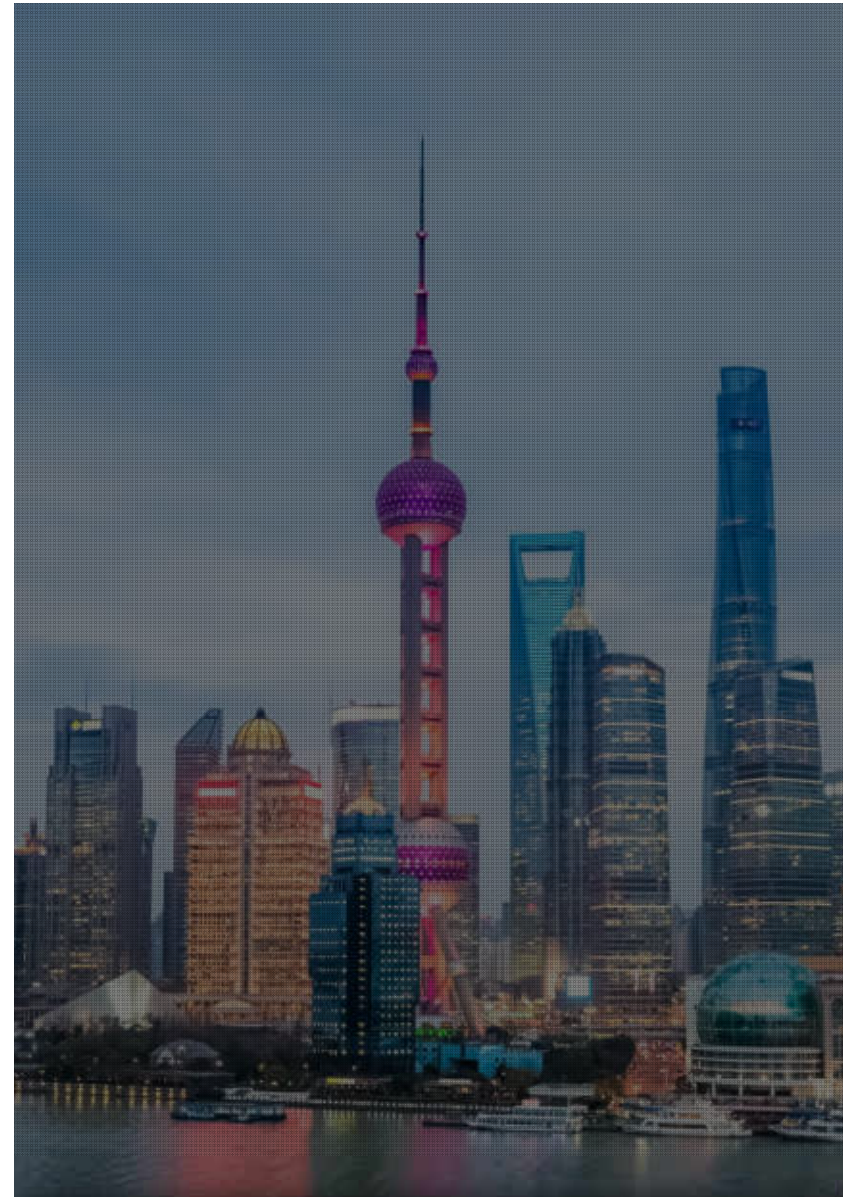
**BRAZIL**

**72%**

**TURKEY**

**MIDDLE CLASS BY 2020**





MEGA CITIES



MEGA REGIONS



MEGA CORRIDORS

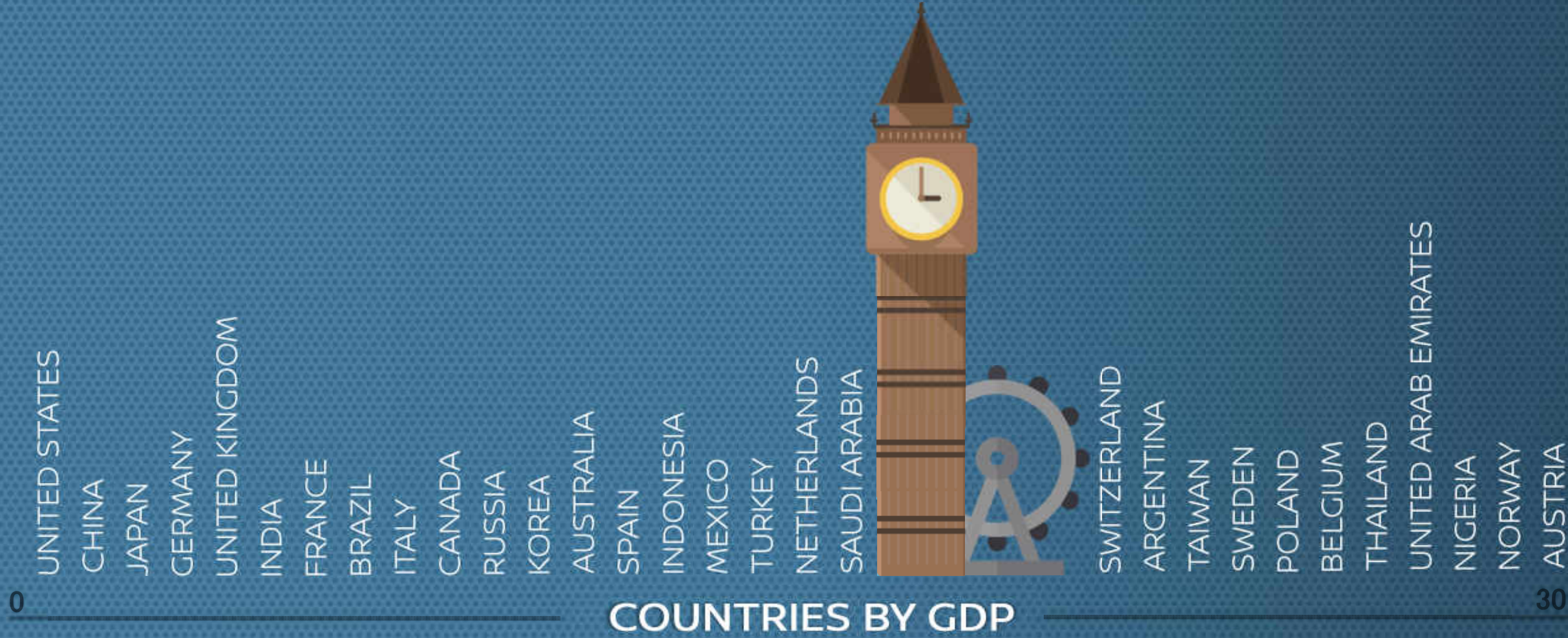


# THE RISE OF THE CITY





# THE RISE OF THE CITY





# THE RISE OF THE CITY

LISBON DRIVES 37% OF PORTUGAL'S GDP



23%

PARIS



28%

ISTANBUL

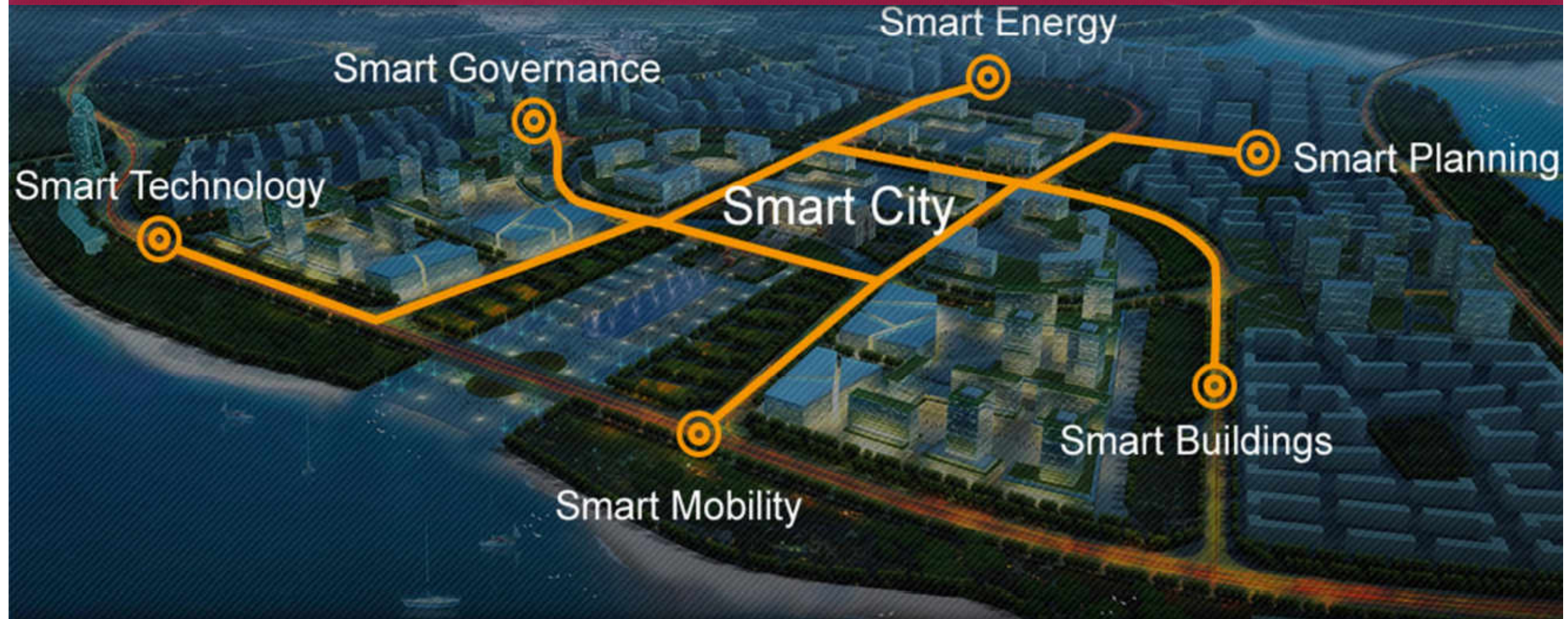


25%

MADRID



# CITY AS THE PRIMARY CUSTOMER



POWERFUL & DEMAND SMART SOLUTIONS







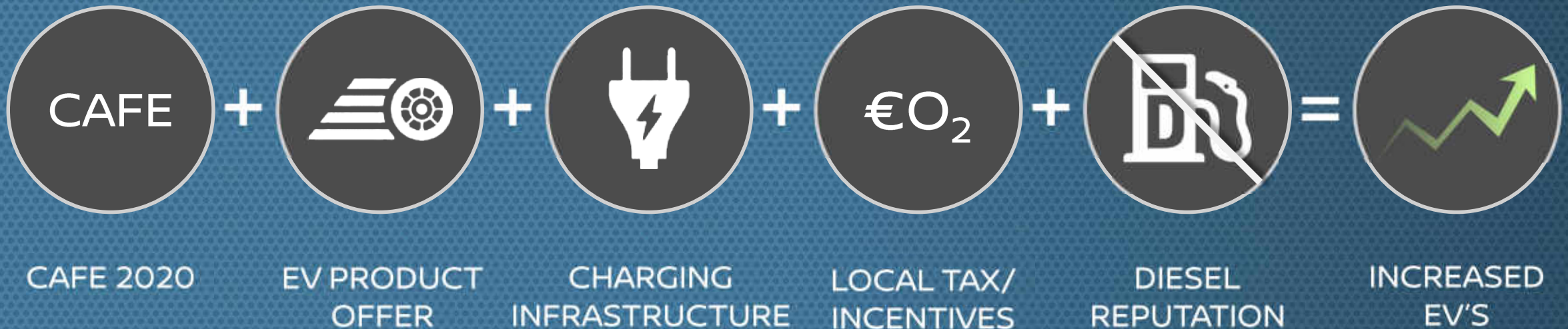
# **EFFICIENCY**



# WE ARE HEADED TO AN EV FUTURE

OFFER DRIVERS

DEMAND DRIVERS



## FASTEST GAINS IN EFFICIENCY



EFFICIENT AND ZERO EMISSION

500,000 EV'S worldwide



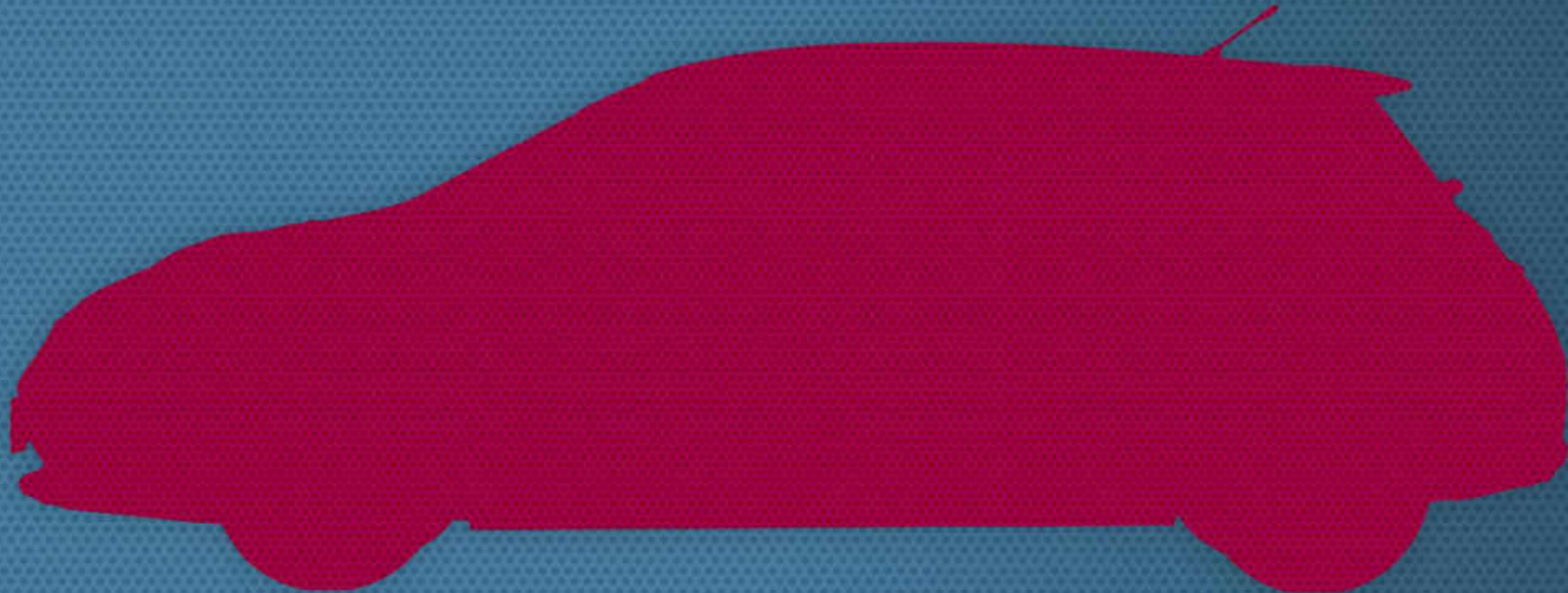
RENAULT NISSAN MITSUBISHI ALLIANCE



**2017**

100,000 EV's / year in Europe

**Nissan Leaf launched in 2010**

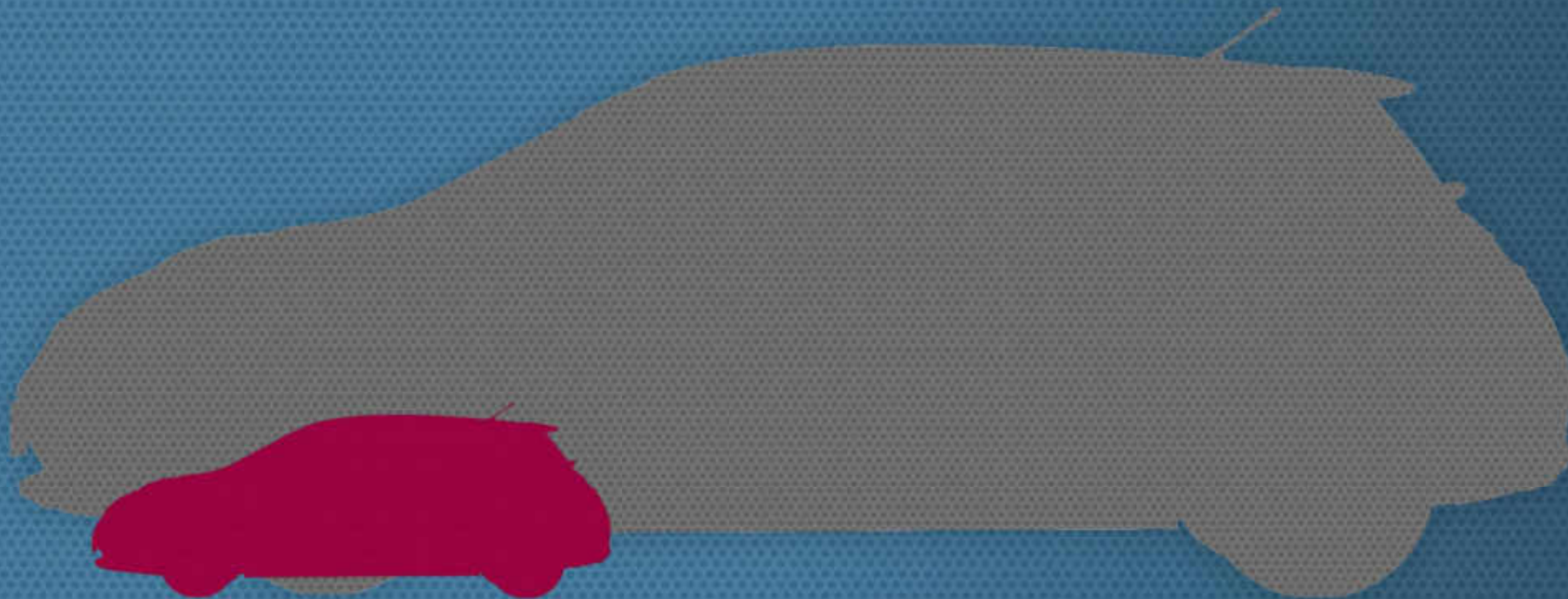




# 2020

300,000 EV's / year in Europe

**Based on public announcements from  
various automotive brands**





# 2025

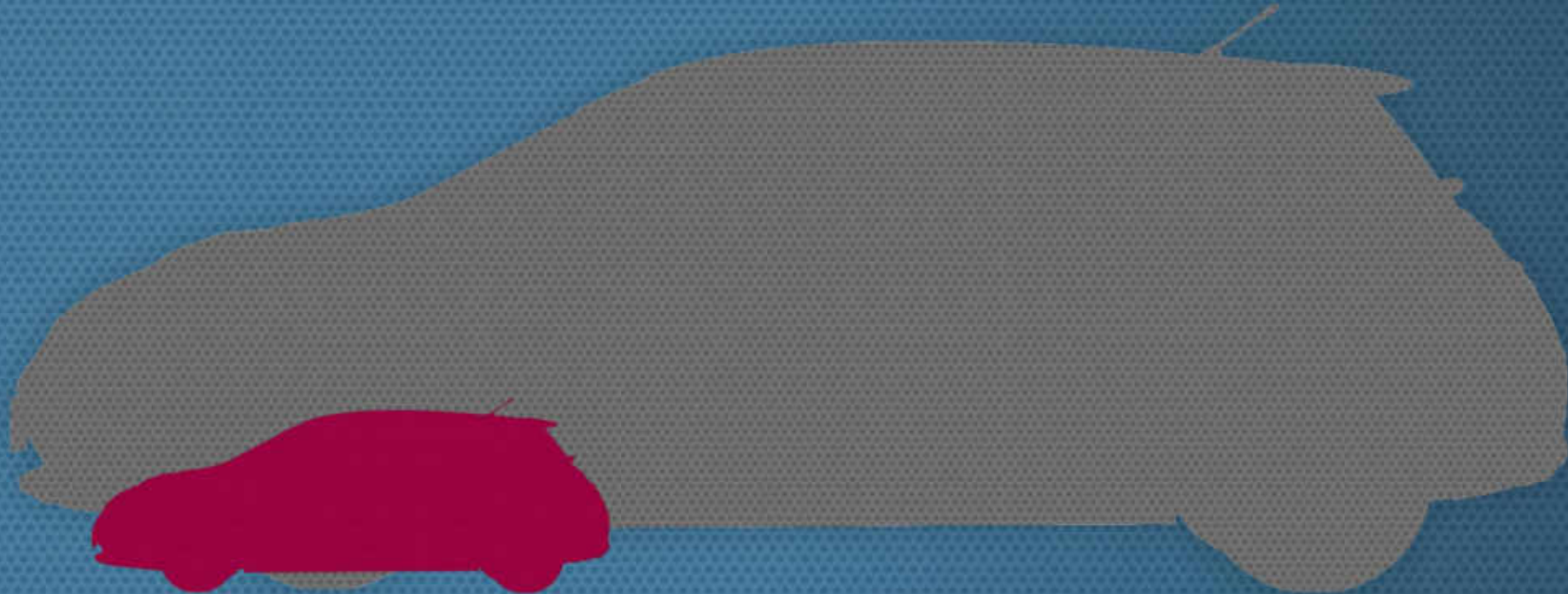
## PREDICTIONS

LMCA DATABASE  
**600k / yr**

BLOOMBERG  
**1.4m / yr**

NORWAY  
PROJECTION  
**2.8m / yr**

COP21 COMMITMENT  
**2.6m / yr**

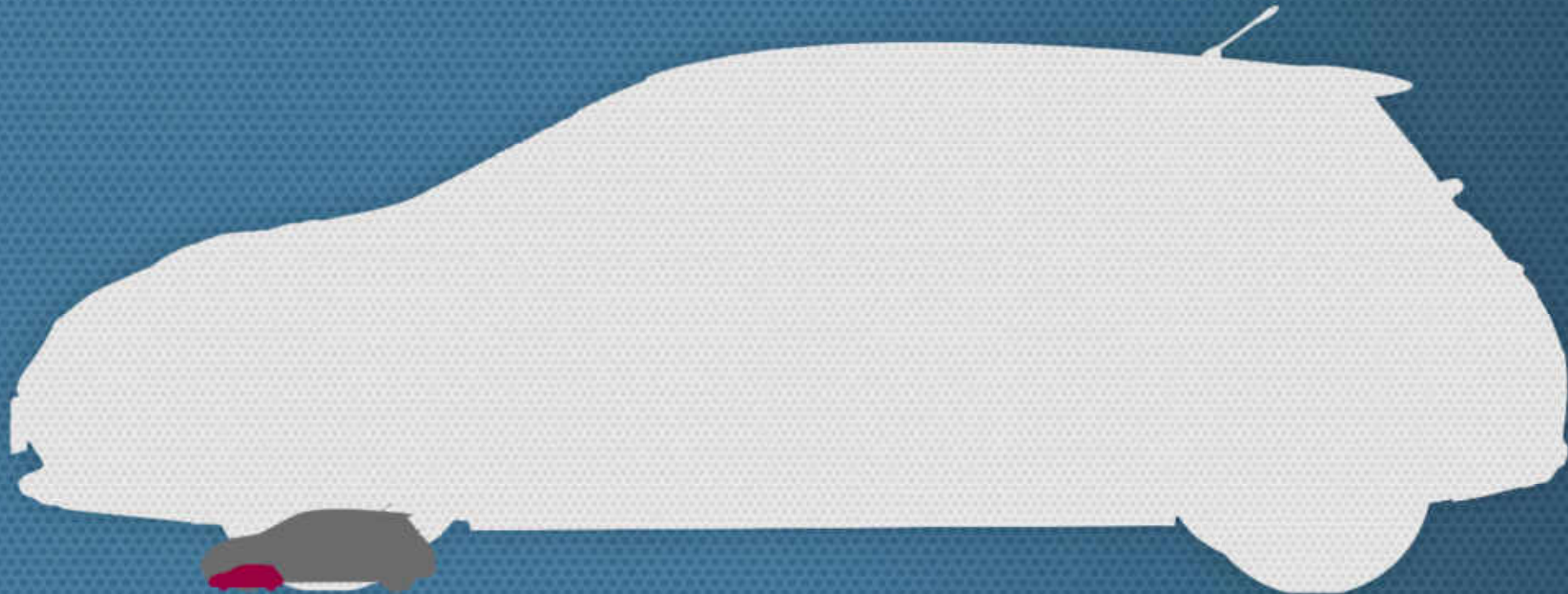




# 2025

2,000,000 EV's in Europe

**2.0 Million / yr on AVERAGE**





# SAFETY





1.25M DEATHS

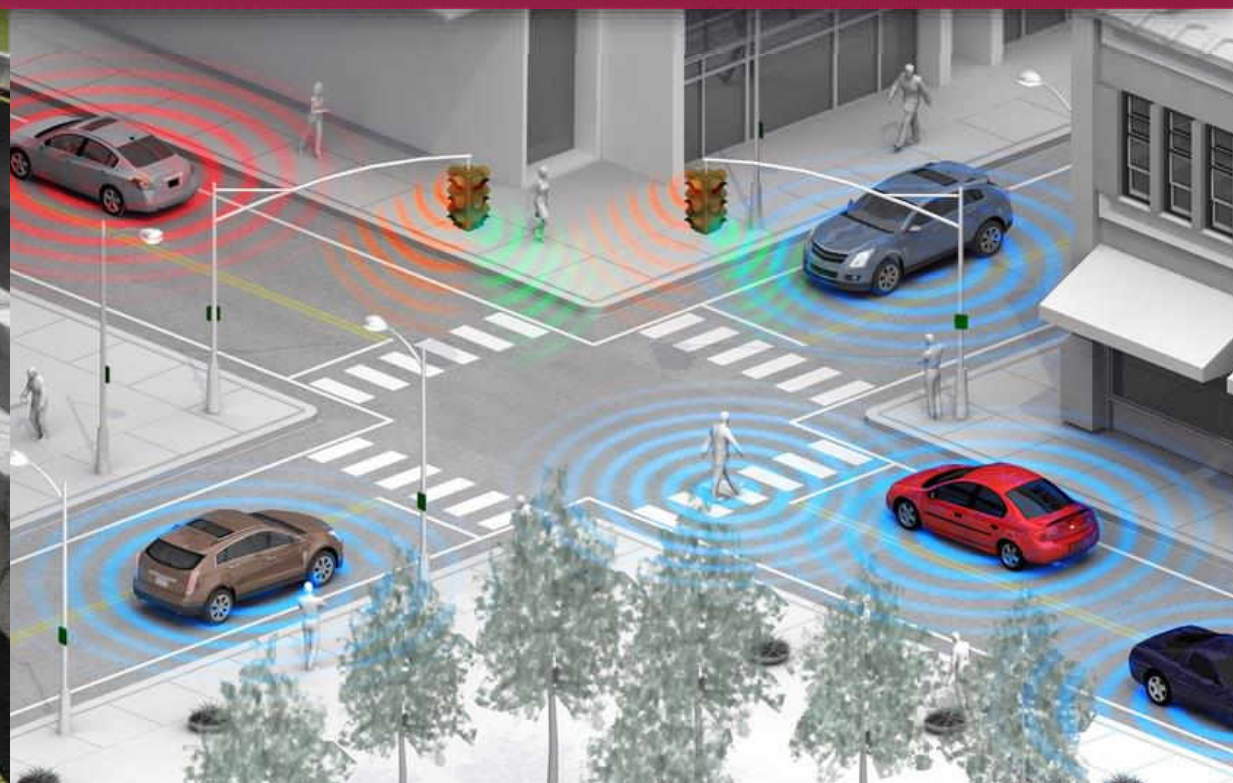




**AN AUTONOMOUS FUTURE**



# AUTONOMOUS & CONNECTED



SAFER, FASTER, LESS CONGESTION & EMISSIONS



CAR TO CLOUD & CLOUD TO CAR



**5G**

THE GAME CHANGER BY 2020



**SUSTAINABILITY**





**RENEWABLE ENERGY SOURCES TO  
POWER AN EV FUTURE**





**STORE, TRANSPORT & USE ENERGY  
WHEN AND WHERE YOU NEED IT**





Innovation  
that excites



# STABILIZING THE GRID & REDUCING ENERGY COSTS



**300,000 Nissan Leafs: 4 Billion km**



**1.5 Million tonnes of CO2 saved  
Equivalent: 25 x Lisbon in dense forest**



**INVESTING IN THIS  
INTELLIGENT MOBILITY  
FUTURE**



## TRADITIONAL VIEW

$$\begin{array}{ccccc} 80\text{M} & & & & \\ \text{New cars sold} & \times & \sim\$20\text{k}/ & = & \sim\$1.6 \\ & & \text{New car} & & \text{Trillion} \end{array}$$

## CONTEMPORARY VIEW

$$\begin{array}{ccccc} 1\text{Bn} & & & & \\ \text{Existing} & \times & 10,000 & \times & \sim\$1 \\ \text{vehicles} & & \text{Miles/year} & & \text{Per mile} \\ & & & = & >\$10 \\ & & & & \text{Trillion} \end{array}$$

# VALUING THE INDUSTRY



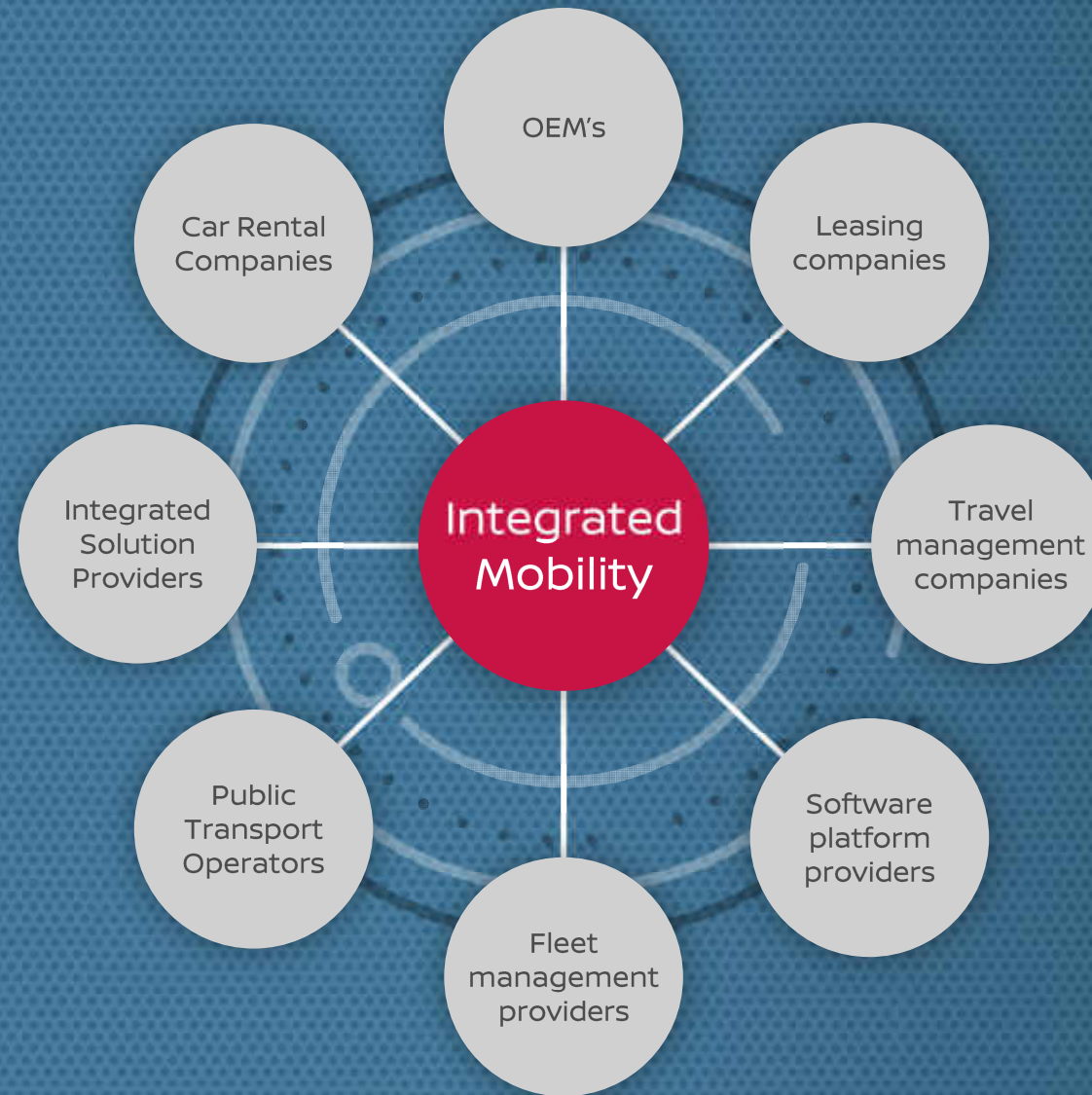
$$10\text{Tn Miles/Yr} \times 25 \text{ mph} = 400\text{Bn Hours}$$

**THE MARKET OPPORTUNITY**



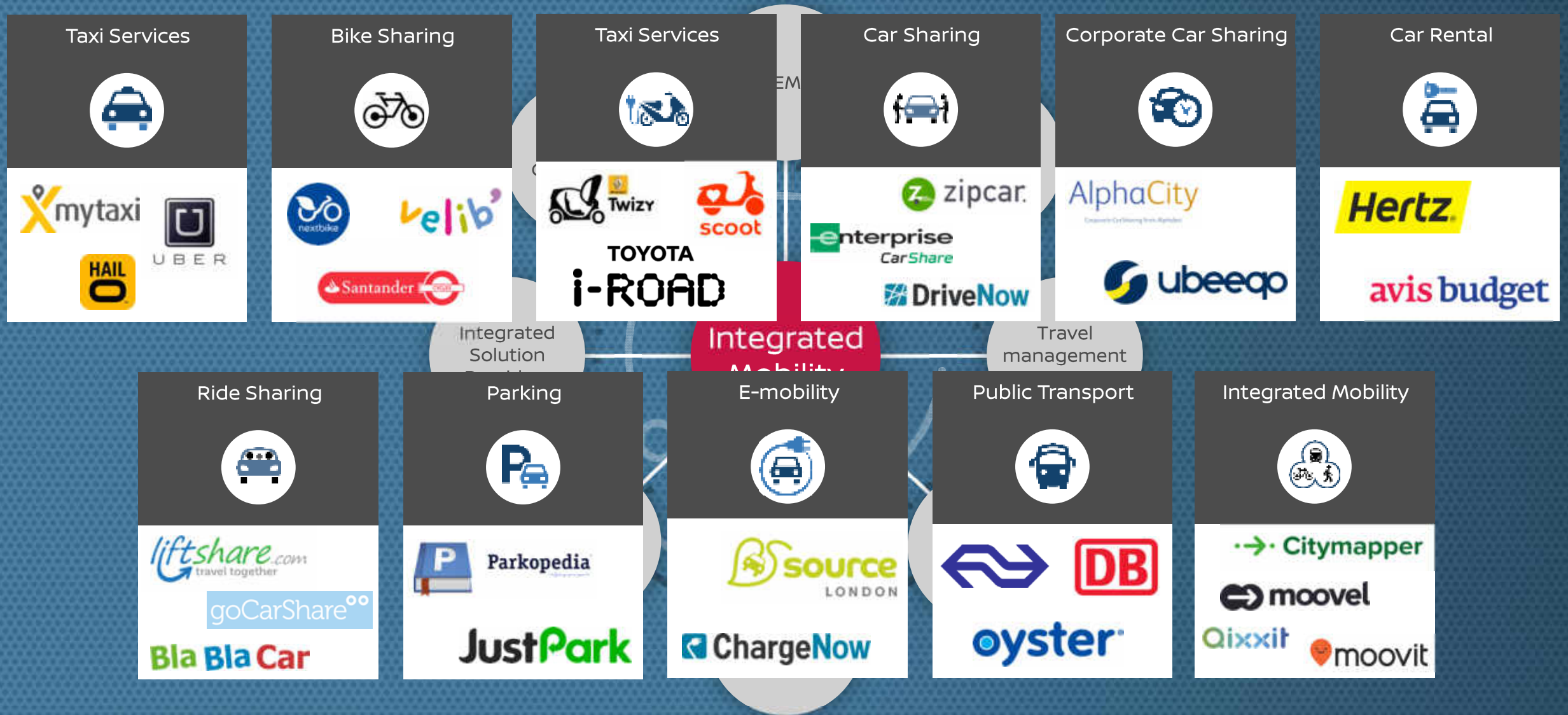
**WHAT WILL THIS  
MOBILITY FUTURE LOOK  
LIKE?**





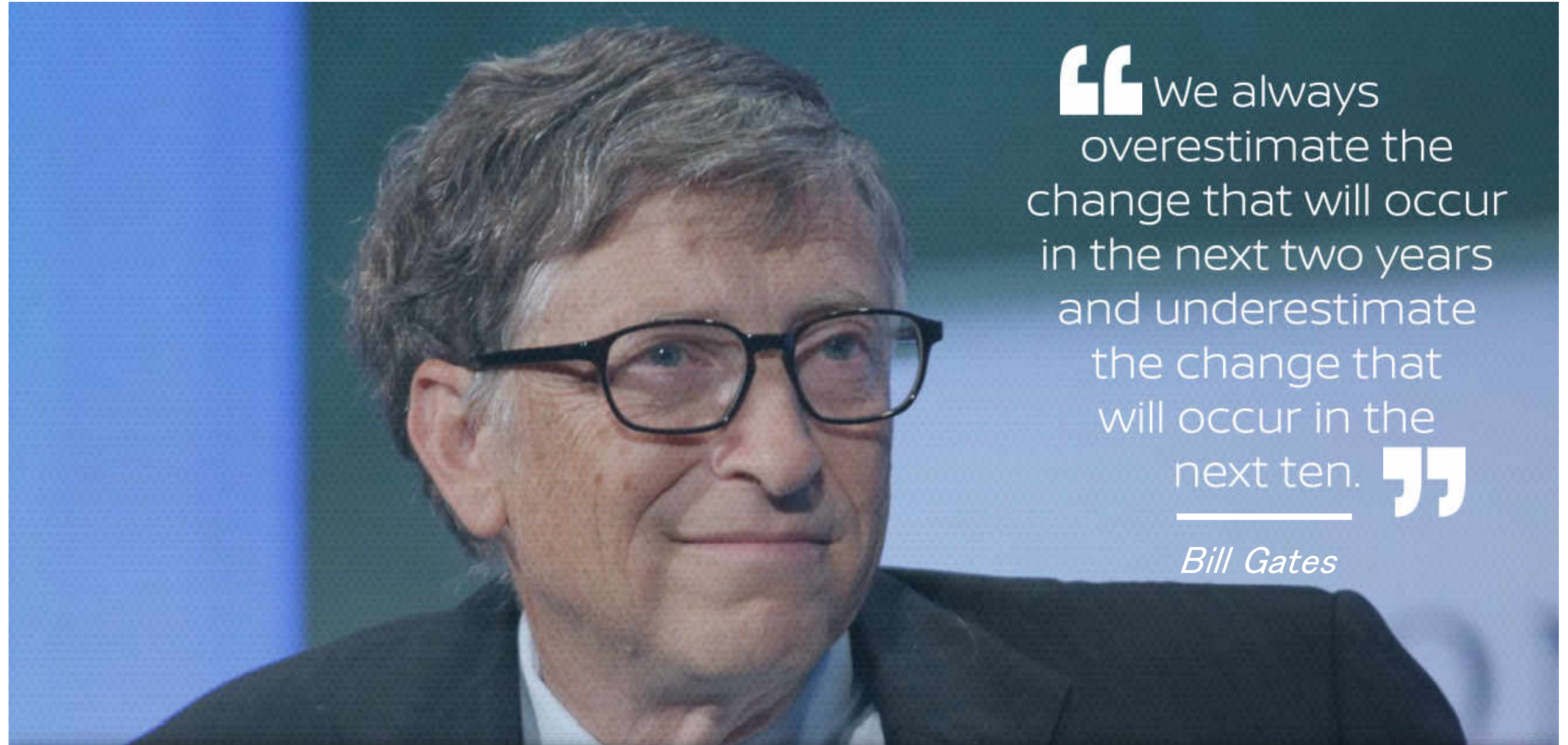
# A FULLY INTEGRATED PLATFORM





# A FULLY INTEGRATED PLATFORM



A portrait of Bill Gates, wearing his signature black-rimmed glasses and a dark suit jacket over a light blue shirt. He is looking slightly to the right with a thoughtful expression. The background is a soft-focus blue and green.

“ We always  
overestimate the  
change that will occur  
in the next two years  
and underestimate  
the change that  
will occur in the  
next ten. ”

*Bill Gates*

CHANGE IS INEVITABLE  
BUT THE PACE IS UNPREDICTABLE



**THANK YOU**