

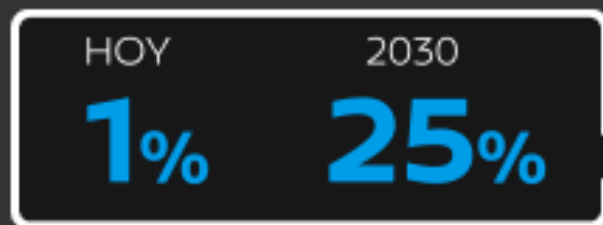


# Jornada Nuevos Combustibles: Fiscalidad, Eficiencia y Digitalización

## MESA: FABRICANTES DE VEHÍCULOS

Juan Luis Plá de la Rosa  
Director de Relaciones Institucionales de NISSAN  
(18 de Mayo de 2021)

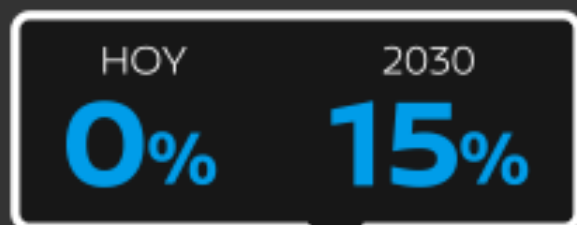
## TENDENCIAS DEL SECTOR DE AUTOMOCIÓN



Fuente: Bloomberg



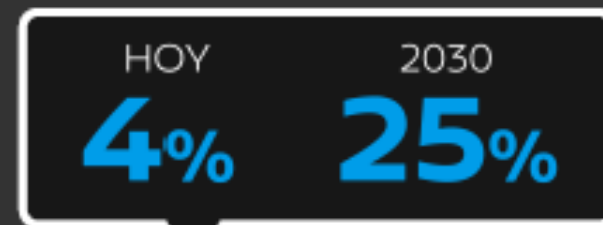
VEHÍCULOS ELÉCTRICOS



Fuente: McKinsey



CONDUCCIÓN AUTÓNOMA



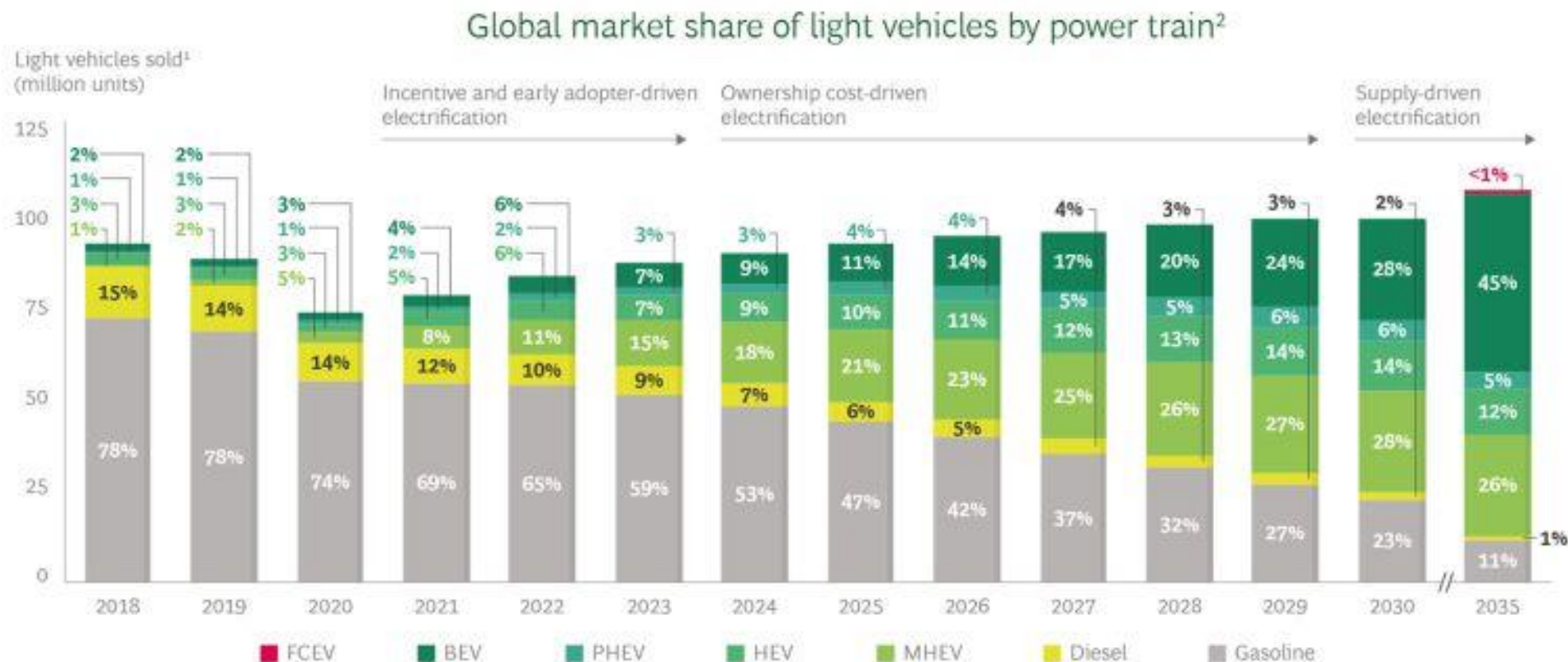
Fuente: Morgan Stanley



MOVILIDAD COMPARTIDA

# Tendencias

## Exhibit 1 - The Global Market Share of Electrified Vehicles Will Grow Dramatically Through 2035



Source: BCG analysis.

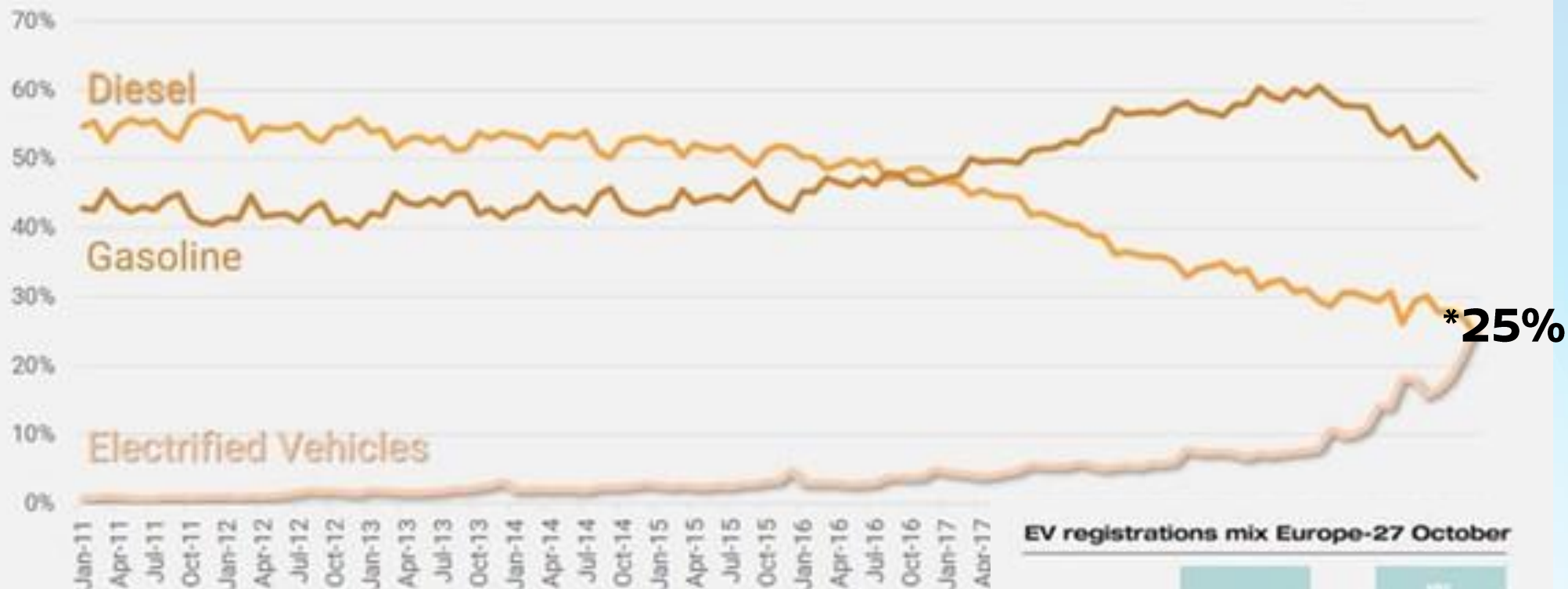
Note: FCEV=fuel-cell electric, BEV=battery electric, PHEV=plug-in hybrid electric, HEV=full hybrid electric, MHEV=mild hybrid electric. Because of rounding, the percentage total for a particular year may not equal 100%.

<sup>1</sup>Sales for 2018, 2019, and 2020 are actual data. Data for 2021 onward are BCG projections.

<sup>2</sup>Forecast includes cars, SUVs, and all other light passenger vehicles except heavy-duty vans.

# Tendencias

**Monthly Car registrations by fuel type  
As % of total. 2011 - 2020 Europe-27**



\*Electrified Vehicles: BEVs, PHEVs, HEVs

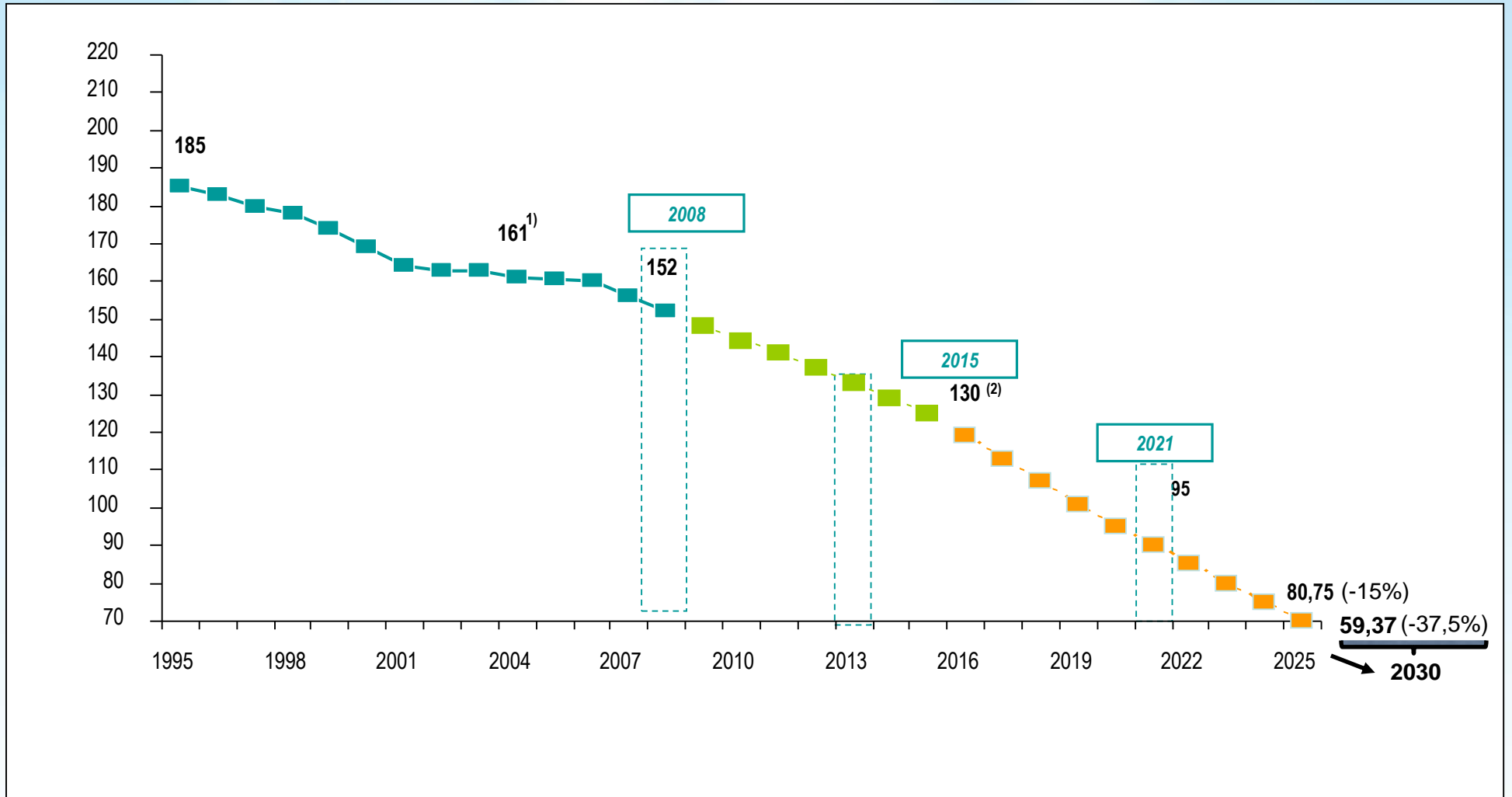
**EV registrations mix Europe-27 October**



# Tendencias

Global sales target	EV	PHEV	HEV	ICE	Target Year	Ref
<b>VW group</b>						
VW	>70%				2030 (EUR)	<a href="#">link</a>
Audi						-
Porsche	80%				2030	<a href="#">link</a>
Bentley	100%				2030	<a href="#">link</a>
<b>BMW group</b>						
BMW	50%				2030	<a href="#">link</a>
Mini	50%				2027	<a href="#">link</a>
	100%				2030	
Daimler	>50%				2030	<a href="#">link</a>
<b>Stellantis</b>						
		38%			2025 (EUR)	<a href="#">link</a>
		70%			2030 (EUR)	
PSA		80%			2023 (EUR)	<a href="#">link</a>
Peugeot		100%			2023 (EUR)	
<b>Volvo</b>						
		50%	50%		2025	<a href="#">link</a>
		100%			2030	
<b>JLR</b>						
Jaguar		100%			2025	<a href="#">link</a>
Land Rover		60%	10%	30%	2030	
		100%			2036	
<b>Ford of Europe</b>						
		100%			2026 (EUR)	<a href="#">link</a>
		100%			2030 (EUR)	

## OBJETIVOS CO<sub>2</sub> FLOTA COMERCIALIZADA EN LA UE (g/km) (Reglamento 443/2009)



1) UE15

2) 120 g/km vehículos; 10 g/km adicionales mediante mejoras en neumáticos, AC

# OBJETIVOS CO<sub>2</sub> FLOTA COMERCIALIZADA EN LA UE (g/km)

## CAFE (Corporate Average Fuel Economy) for M1

$$\text{OEM's CO}_2 \text{ Actual} = \frac{\text{SUMPRODUCT ( Powertrain CO}_2 \times \text{Powertrain Volume )}}{\text{SUM ( Powertrain Volume )}}$$

$$\text{CAFE Target} = 95 + 0.0333 * (\text{Mass} - \text{Mo})$$

Individual CO<sub>2</sub> target for a vehicle with a given **Nissan** powertrain

CO<sub>2</sub> target for the **entire industry**

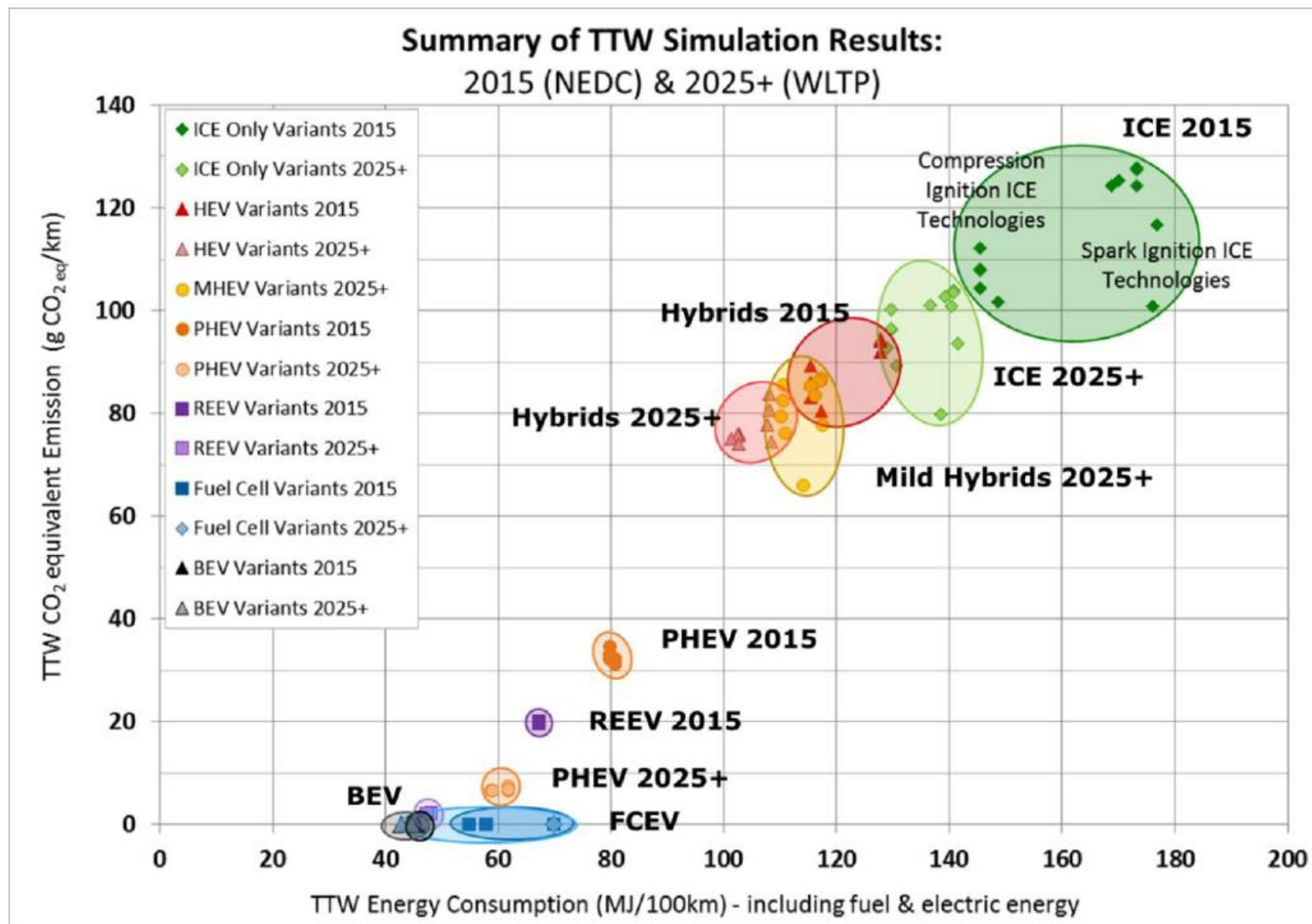
Mass in running order [kg] of the vehicle where the given **Nissan** powertrain is located

Average Mass [kg] of all Passenger Cars of **all Brands** registered during 3 consecutive years.

	CY20	CY21	CY22	CY23	CY24
<b>CAFE target:</b> Industry Average	95 <sub>NEDC</sub>	111,6 <sub>WLTP</sub>	111,2 <sub>WLTP</sub>	110,7 <sub>WLTP</sub>	95,2 <sub>WLTP</sub>
<b>Phase-In:</b> Take into account only the % less emitting cars in the line-up	95%	100%	100%	100%	100%
<b>Super-Credits:</b> each vehicle with <50g CO <sub>2</sub> counts as...	2	1.67	1.33	1	1
	-7.5g* CO <sub>2</sub> max over CY20-22				
<b>Eco-Credits**:</b> Off-cycle technologies helping to save CO <sub>2</sub>	-7g CO <sub>2</sub> max per year				

# ¿Porqué el VE? – Impacto ambiental

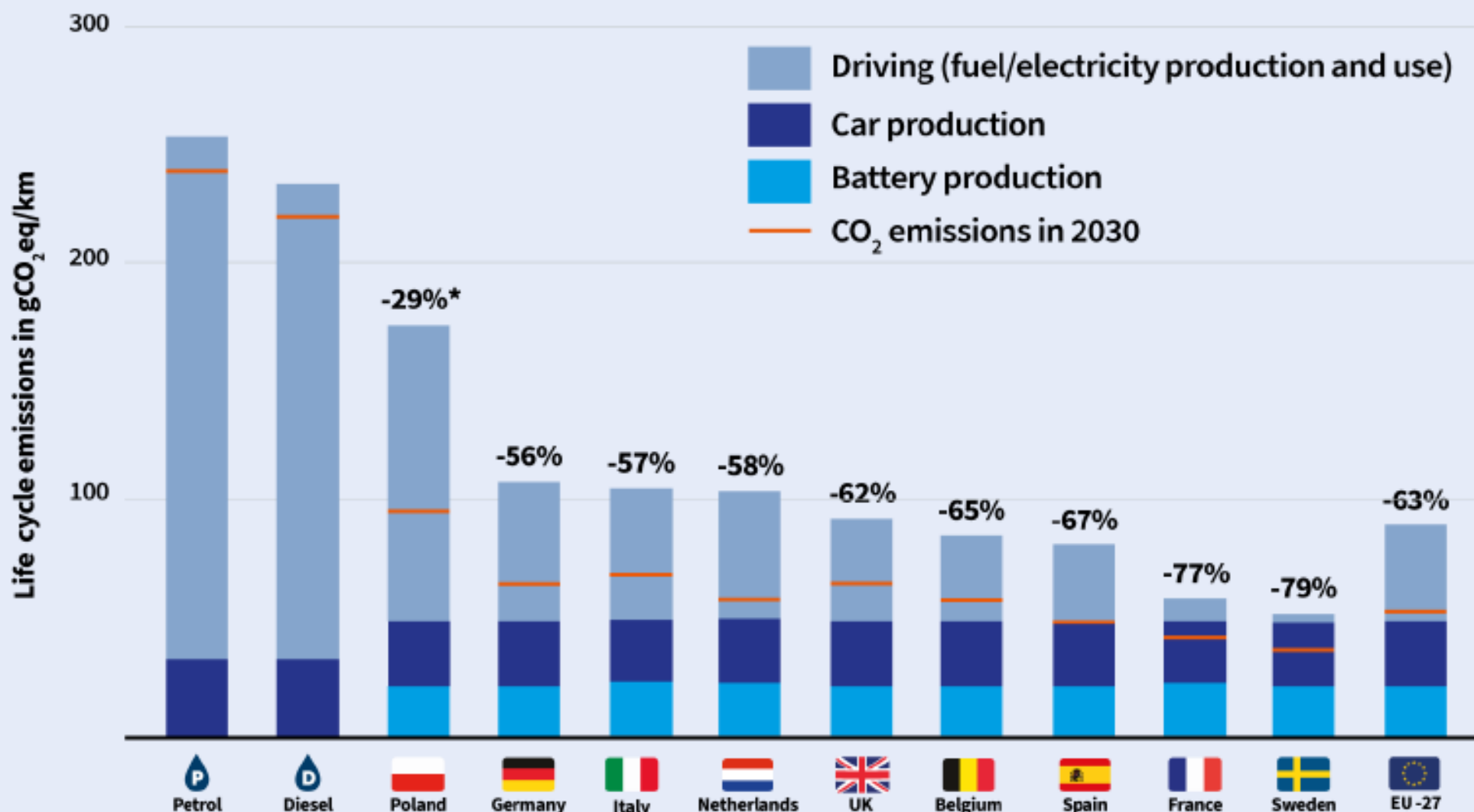
**Figure 13:** Summary of TTW Simulation Results for 2015 (NEDC) & 2025+ (WLTP) Variants; note that electric energy consumption includes charging losses





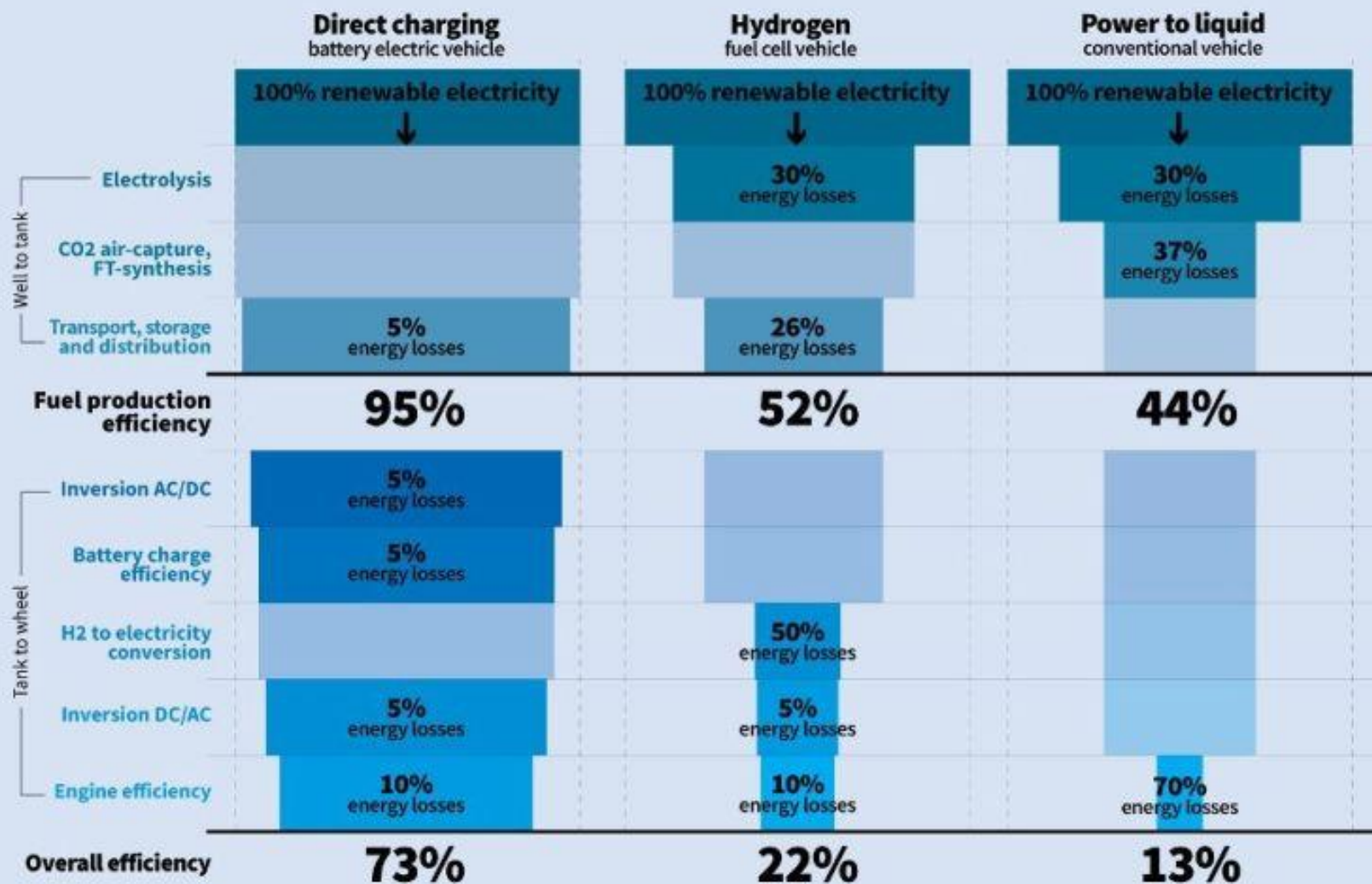
# ¿Porqué el VE? – Impacto ambiental

**Today petrol and diesel cars emit almost 3 times more CO<sub>2</sub> than the average EU electric car**



Scenario where average EU electricity is used to produce the batteries and the cars

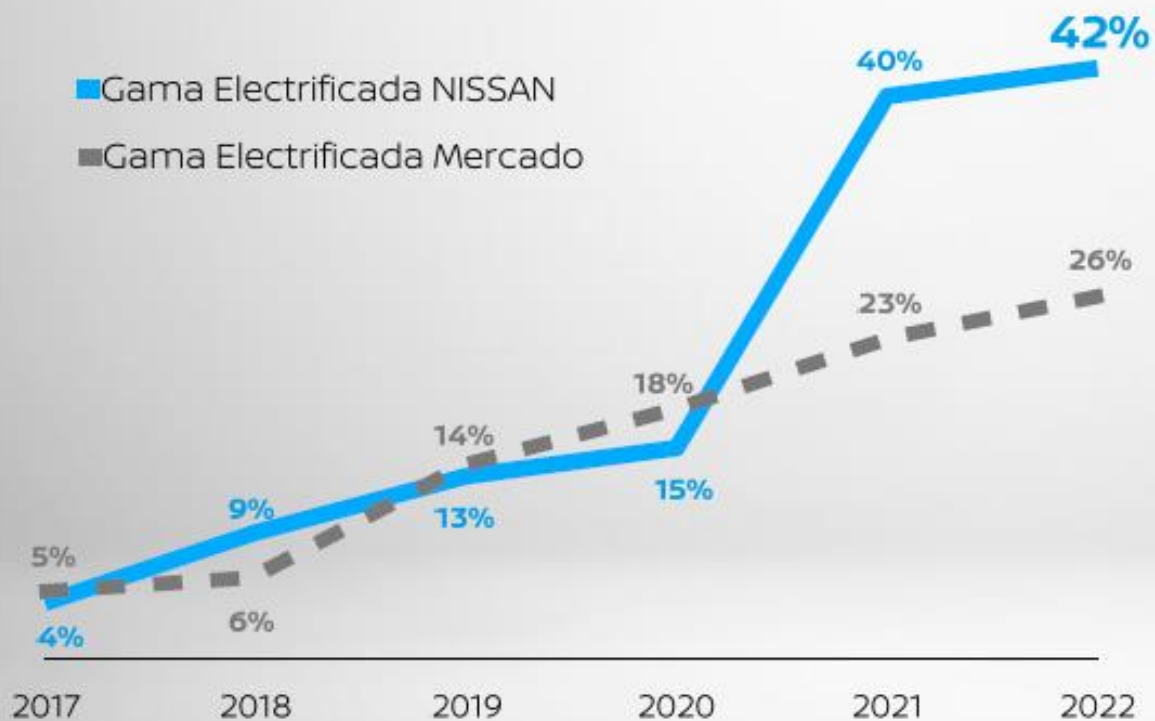
## Cars: Battery electric most efficient by far



Nuestra visión de crear un futuro  
más **SOSTENIBLE** para todos  
es ahora una **REALIDAD**



## NISSAN: 42% GAMA ELECTRIFICADA EN 2022



**Zero Emission**



**Más vendido en el mundo**



**e-POWER**



**Más vendido en Japón**



## MOTORES DE CoMBUSTIÓN **CON BAJAS EMISIONES**



**2007**



**HOY**

**-85%**

NOx

**-99%**

Partículas

**-30%**

CO2

## EL PAPEL DEL **VEHÍCULO ELÉCTRICO**

AYER



**MOVILIDAD**



HOY



**EFICIENCIA ENERGÉTICA**

**Generación**



**Almacenamiento**



Estacionario



Móvil

NISSAN  INTELLIGENT MOBILITY

0

EMISIONES

0

ACCIDENTES

**¡GRACIAS!**