New Clio CMF-B
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New Renault CLIO
Renault CLIO 4

2.6 million since 2013
451,000 in 2018
#1 B-Segment
In Europe since 2013
#1 French car in the world

15 million in 30 years
Smart cockpit
Driver oriented
New Renault CLIO
Renault CLIO 4
New Renault CLIO
Renault CLIO 4
New Renault CLIO
Life on board & Perceived Quality
Renault CLIO 4

330L

New Renault CLIO

391L
Best in class
New Renault CLIO
New Renault CLIO
New Renault CLIO
New Renault CLIO
Technology & Innovations
CMF-B Platforms Family
0.640 CdA
Petrol engine range

Best price / economy ratio

1.0 SCe 65 MT-5
1.0 SCe 75 MT-5

Best selling

1.0 TCe 100 MT-5
1.0 TCe 100 MT-5
1.0 TCe 100 LPG MT-5
1.3 TCe 130 EDC7

Performance, fun to drive
1.0 TCe 100
MT-5

Power: 74 kW at 5,000 rpm
Torque: 160 N.m at 2,750 rpm

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INVESTOR RELATIONS – CLIO 5 TEST DRIVE
JUNE 26, 2019
PROPERTY OF GROUPE RENAULT
Power: 96 kW at 5,000 rpm
Torque: 240 N.m at 1,600 rpm

1.3 TCe 130 EDC7

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TCe 120
Diesel engine range

1.5 Blue dCi 85
MT-6

1.5 Blue dCi 115
MT-6
E-TECH Hybrid powertrain

Hybrid powertrain technology

Battery
1.2 kWh
Electric motor 1
Electric motor 2
Internal combustion engine
Multimode clutchless gearbox
EASY DRIVE

SAFETY

- Active Emergency Brake System
- Blind Spot Warning
- Traffic Sign Recognition with Speed Alert
- Lane Departure Warning / Lane Keeping Assist

DRIVING ASSIST

- Highway & Traffic Jam Companion
- Adaptive Cruise Control
- Cruise Control & Speed Limiter
- Automatic High-Low Beam

PARKING

- 360° camera
- Front / Rear / Side Park Assist
- Easy Park Assist
Highway & Traffic Jam Companion
360° camera
EASY LINK
Fully customizable
One line search with Google
Connected navigation
ANDROID AUTO
APPLE CARPLAY
Auto update
MULTI-SENSE
All-new Renault CLIO

MARKET CONTEXT, LAUNCH, COMPETITIVENESS
EUROPE MARKET EVOLUTION BY SEGMENT

- **C Seg**: 39% → 41% → 42% → 41% → 41% → 42% → 41% → 40%
- **B Seg**: 29% → 29% → 29% → 30% → 30% → 29% → 31% → 33%
- **D Seg**: 15% → 13% → 13% → 14% → 14% → 14% → 13% → 13%
- **A Seg**: 10% → 10% → 9% → 9% → 9% → 8% → 8% → 8%
- **E Seg**: 7% → 6% → 6% → 6% → 6% → 6% → 6% → 5%

EUROPE B SEGMENT EVOLUTION BY BODYTYPE

- HATCH
  - 2012: 75%
  - 2013: 73%
  - 2014: 70%
  - 2015: 66%
  - 2016: 64%
  - 2017: 64%
  - 2018: 59%
  - 2019: 58%

- MPV
  - 2012: 6%
  - 2013: 10%
  - 2014: 14%
  - 2015: 20%
  - 2016: 23%
  - 2017: 25%
  - 2018: 33%
  - 2019: 36%

- SUV
  - 2012: 6%
  - 2013: 10%
  - 2014: 14%
  - 2015: 20%
  - 2016: 23%
  - 2017: 25%
  - 2018: 33%
  - 2019: 36%

- SW
  - 2012: 6%
  - 2013: 10%
  - 2014: 14%
  - 2015: 20%
  - 2016: 23%
  - 2017: 25%
  - 2018: 33%
  - 2019: 36%
### Segment ranking

<table>
<thead>
<tr>
<th>Rank</th>
<th>Segment</th>
<th>2018 volume</th>
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<tbody>
<tr>
<td>#1</td>
<td>B-HATCH</td>
<td>2.974 ku</td>
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<tr>
<td>#2</td>
<td>C-SUV</td>
<td>2.824 ku</td>
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<tr>
<td>#3</td>
<td>C-HATCH</td>
<td>2.004 ku</td>
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### B hatch evolution

- **2013**: 2698 units
- **2018**: 2974 units

**TIV (M units)**

- 2013: 13.8
- 2018: 17.7
CLIO: LEADER IN EUROPE

CLIO 4 sales in Europe

Leader in B-Segment since 2013

#2 in overall market since 2013
TCO COMPETITIVENESS

TCO evolution – Clio 4 to New Clio

<table>
<thead>
<tr>
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<th>Diesel</th>
<th>Petrol</th>
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<tr>
<td>Clio 4</td>
<td>1.5 dCi 90</td>
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<tr>
<td>NEW Clio</td>
<td>1.5 Blue dCi 85</td>
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<td>Key Competitor</td>
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<tr>
<td>Clio 4</td>
<td>0.9 TCe 90</td>
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<tr>
<td>NEW Clio</td>
<td>1.0 TCe 100</td>
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<tr>
<td>Key Competitor</td>
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</tbody>
</table>

-15%  
-14%

Targeting top level RV +5pt vs Clio 4

High Fuel Efficiency
-14% or -0.8L

TCO performance to be further improved with upcoming E-TECH hybrid

TCO Fleet - 36m/90,000km

Running cost €/m
Ownership cost €/m

INVESTOR RELATION – CLIO 5 TEST DRIVE
JUNE 26, 2019
PROPERTY OF GROUPE RENAULT
ENLARGED PRICE COVERAGE

France, ICE versions, excluding Sport versions (RS220, GTI...)

Clio4  Polo  C3  Fiesta
All-new Renault CLIO

CMF-B
CUSTOMERS BENEFIT

- Multi Energy
- Weight Reduction & Fuel Economy
- Agile Drive
- Passive Safety

E-TECH
HYBRIDS
FOR EVERYONE

Structure in engine bay, Structure of passenger compartment, B-Pillar structure have been reinforced in order to improve passengers protection.

-50kg and full undercover CO2 bricks at best level

Steering more responsive
Reduce brake pedal stroke
Suspension: body motion control and vertical comfort improved
Aerodynamics
Best in Class

SCx = 0.640

-3g CO₂

Innovative
Hybrid Powertrain Technology

RENAULT 1st HYBRID

Fun to drive
80% of total urban journey time using electric
40% economy in fuel consumption when driving in urban areas
CMF-B STRATEGY

V-PF
Micra, Note

B-PF
Clio, Captur

B0-PF
Logan
Family

Costly Body swap

Performance Improvement
(CO2, Weight reduction, Electrification,
Safety incl. ADAS, 4WD etc.)

Cost reduction

CMF-B convergence Platform

Specifications

Right Content

Alliance strategy is to **converge 3 platforms to 1 platform** for all the **B range** worldwide

✓ Platform update needed to improve performance & to keep competitiveness in the market

✓ **Right sizing** and **right content** for each brand and each market
BIG MODULES

ENGINE BAY
FRONT UNDERBODY
COCKPIT
REAR UNDERBODY
E/E(2) ARCHITECTURE

COMMON MODULE FAMILY

HEV / PHEV
ICE / LPG

Adapted to markets

5 Variations by Driving Position

4 Length Variations for WheelBase

Materials adapted to markets

Medium 2/4WD
Long 2/4WD
Long PHEV
X-Long 7 seats

Commonality + interchangeable(1) parts

(1) Parts are different (material, shape, thickness) but interfaces are similar. These parts are interchangeable.

(2) E/E: Electronic and Electrical

INVESTOR RELATIONS – CLIO 5 TEST DRIVE
JUNE 26, 2019
PROPERTY OF GROUPE RENAULT
## FROM STRATEGY TO IMPLEMENTATION

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**Quick Implementation** of the strategy

- Reduced launching timeline: 14 vehicles in 4 years
- Some global vehicles addressing international markets
BODY TYPE AND VEHICLE DIMENSIONS

More than **20 models**
3 body types
5 brands
Large range of width and length
Alliance B-Segment

Market coverage potential:
97% of worldwide B-Segment
Global CMF-B > 4 million units per year by 2025

Worldwide presence
All Regions, 15 Plants
DIVERSITY

4 or less number of variants for **83%** of the platform components

# of variants by component of the CMF-B

<table>
<thead>
<tr>
<th>CMF-B components</th>
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<td>25%</td>
</tr>
<tr>
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</tr>
<tr>
<td>75%</td>
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<tr>
<td>100%</td>
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Maximum = 7

- 4 variants
- 4 or less for 83% of the platform components
CMF-B COST PERFORMANCE AND CONTENT

CMF GAIN

REGULATION, SAFETY & CO2

VEHICLE PERFORMANCE

PREVIOUS

CMF-B platform cost for New Clio

NEW

Cost gap maintained

CMF cost performance covers regulation needs
DEVELOPMENT COST

3 to 1 Platform

4 million units

Reduced launching timeline

Reduced Development Cost

PREVIOUS

NEW

~ -40%