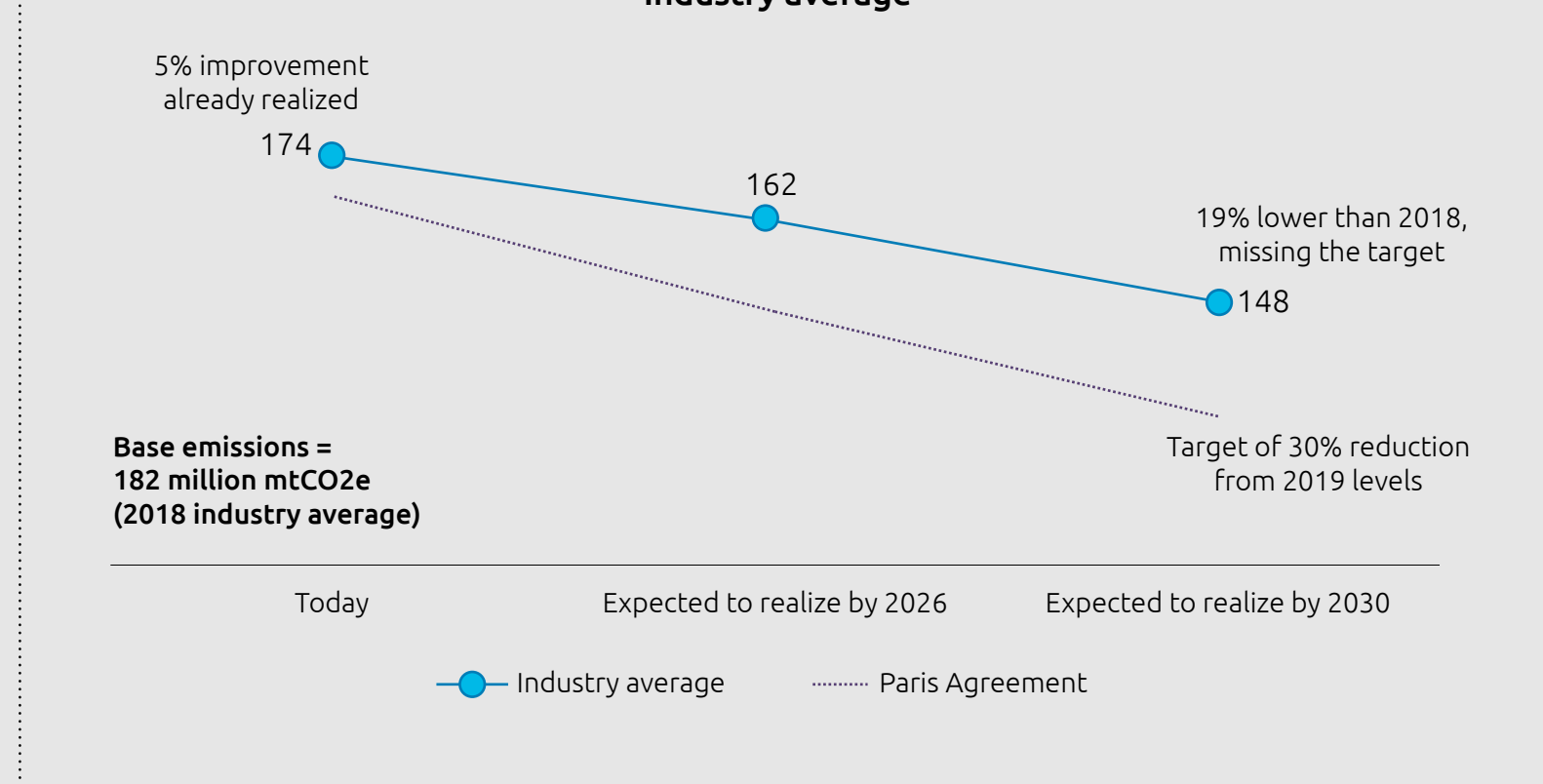


SUSTAINABILITY IN AUTOMOTIVE

FROM AMBITION TO ACTION

Since 2019, the automotive industry has shown little progress on sustainability

Automotive industry is falling short of Paris Agreement target



Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=183 automotive organizations, CDP, Bloomberg New Energy Outlook 2021. Emission numbers are in million mtCO₂e. Industry average = Average of all emissions, including Scope 1, Scope 2, and Scope 3 of 20 large global OEMs for years 2018 and 2021 sourced from CDP (disclosed by OEMs).

Maturity in sustainability strategies has improved only marginally

30% in 2019 vs. 35% in 2022

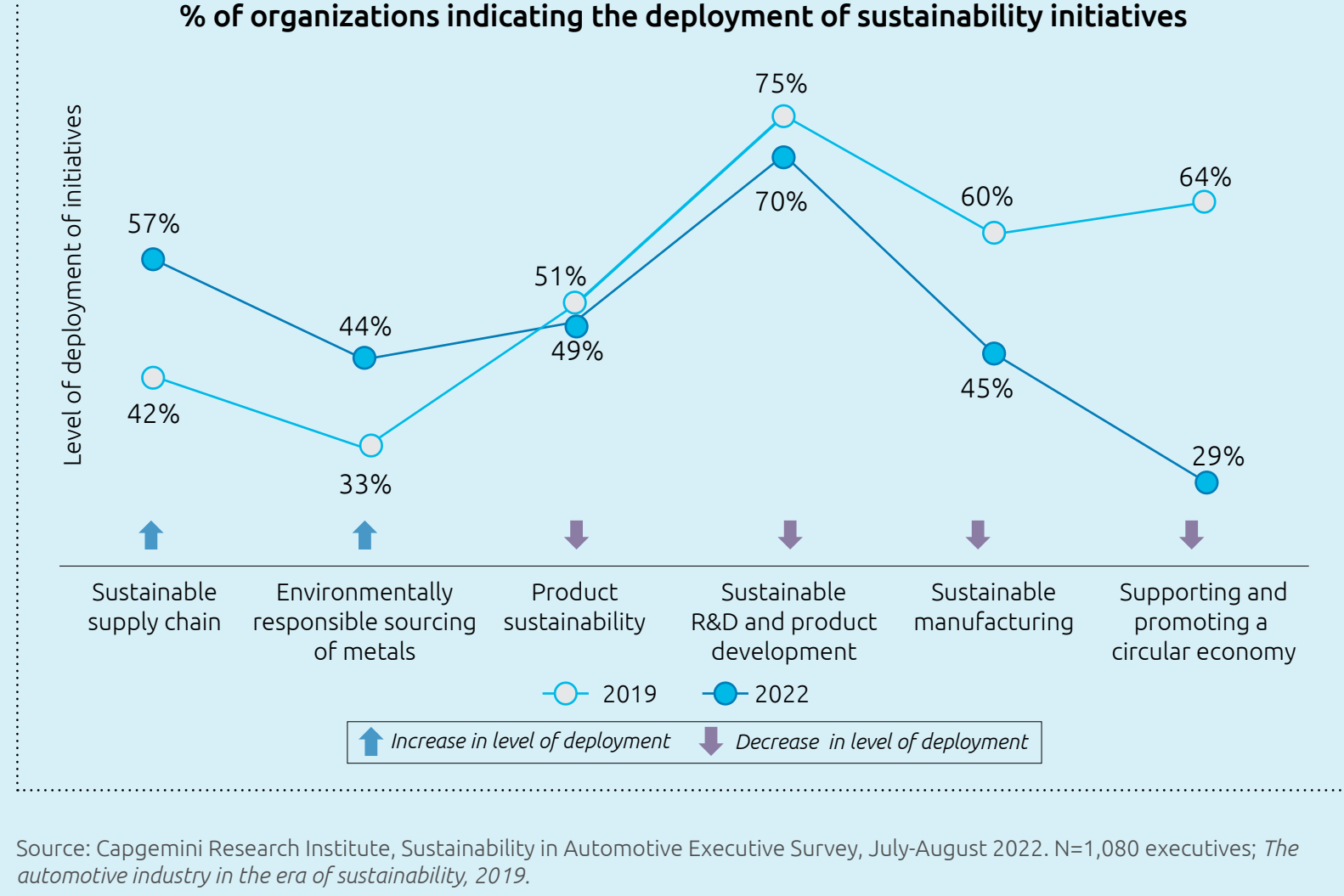
Don't have a sustainability strategy but have multiple sustainability initiatives across the group

62% in 2019 vs. 65% in 2022

Have a comprehensive sustainability strategy with well-defined goals and target timelines

Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=1,080 executives; *The automotive industry in the era of sustainability*, 2019.

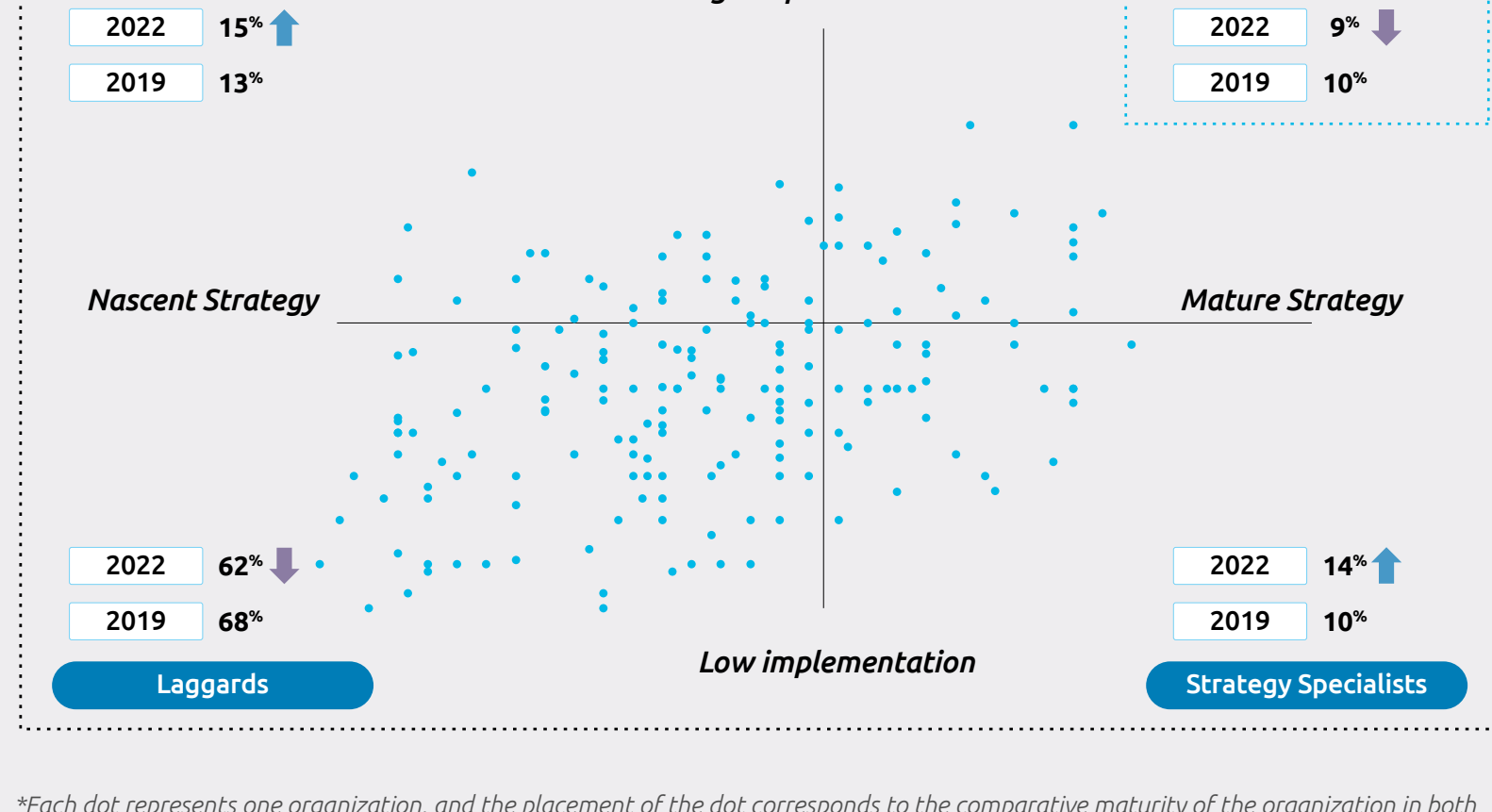
Implementation of top sustainability initiatives has declined



Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=1,080 executives; *The automotive industry in the era of sustainability*, 2019.

Less than 10% of organizations are mature in their sustainability strategies as well as implementation

Maturity of sustainability strategies and its implementation: Automotive industry

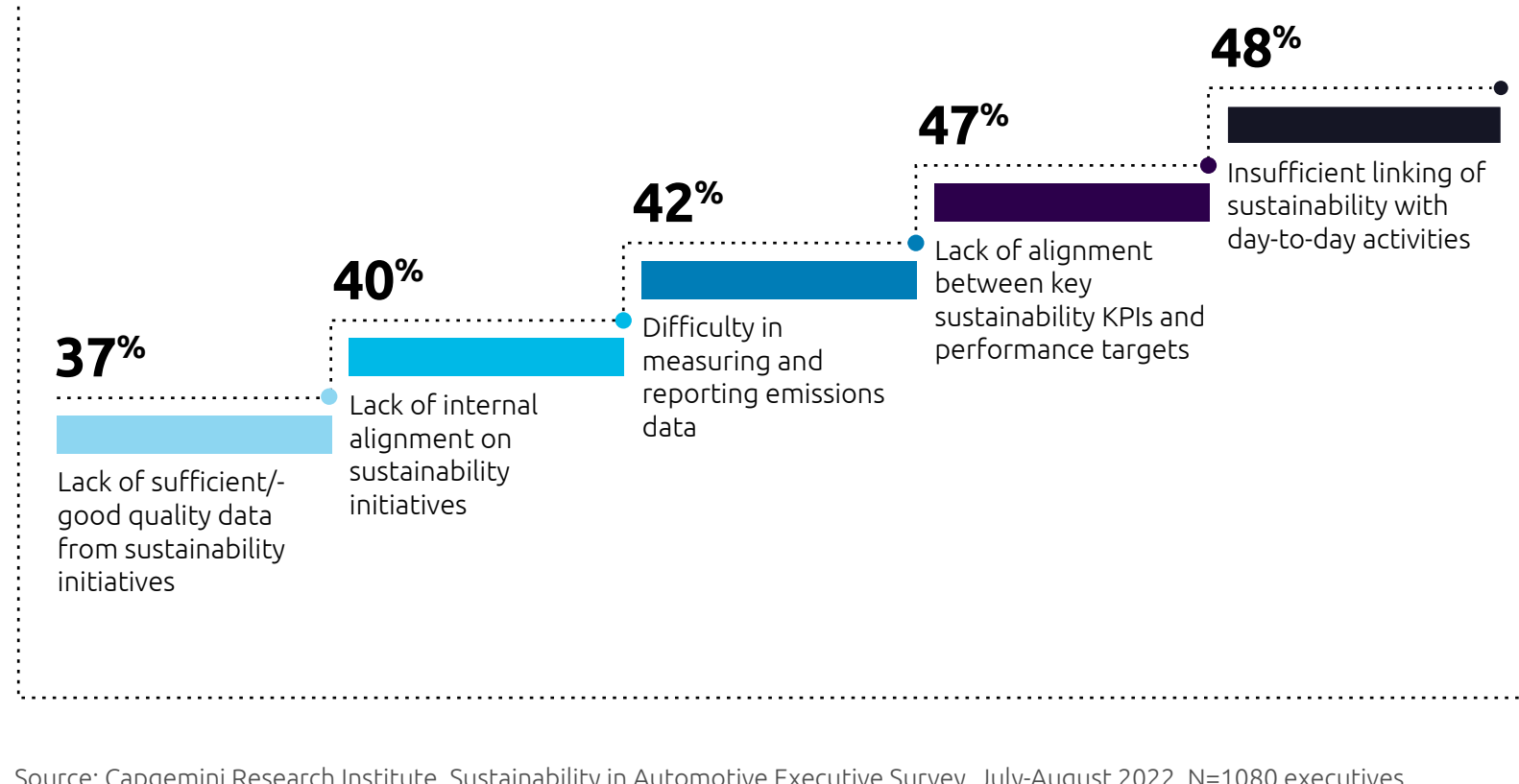


*Each dot represents one organization, and the placement of the dot corresponds to the comparative maturity of the organization in both strategy and implementation of sustainability. The percentages represent the share of organizations in each quadrant.

Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=183 automotive organizations (including OEMs and Suppliers); *The automotive industry in the era of sustainability*, 2019.

Challenges to sustainability initiatives

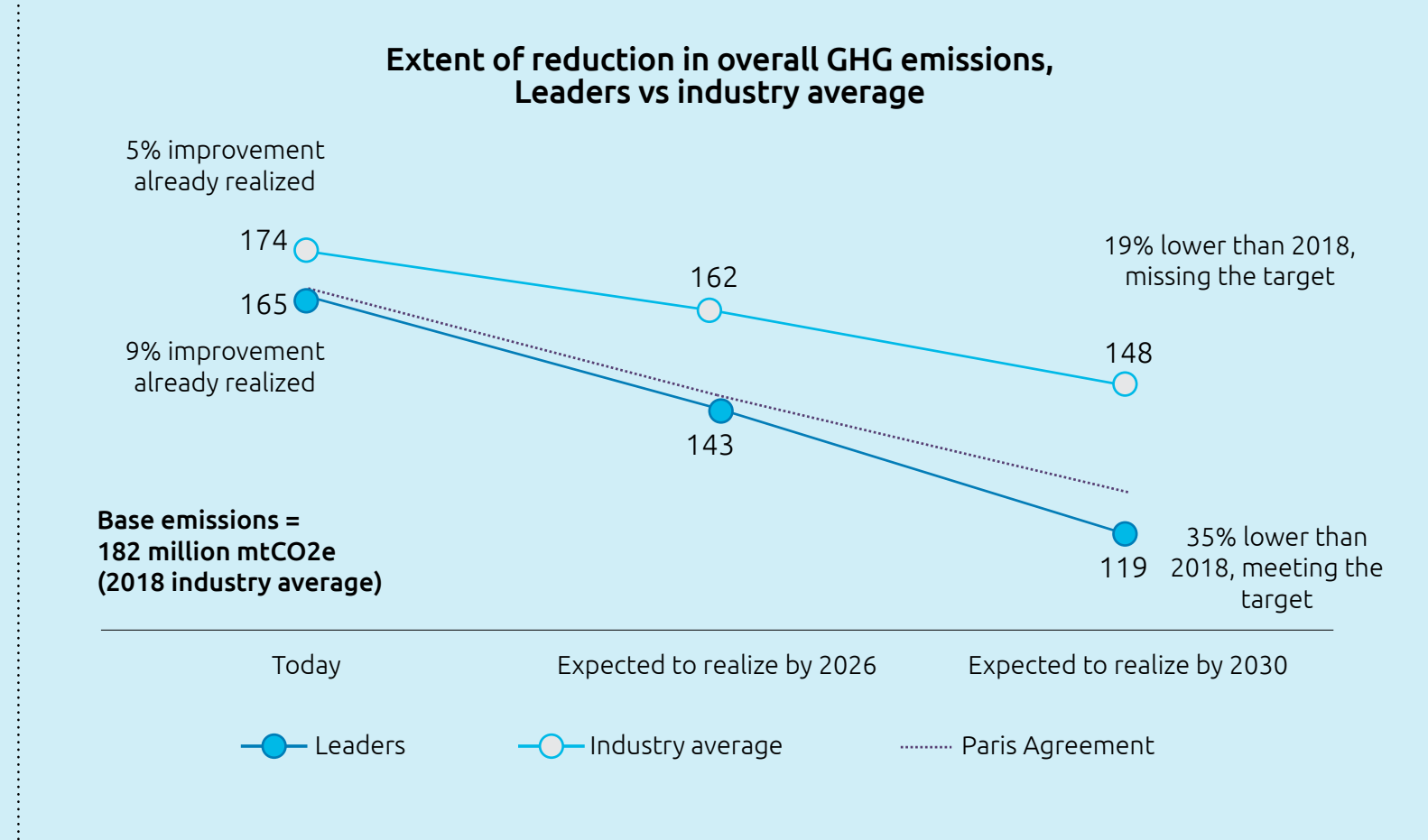
Top challenges faced by the automotive industry in their sustainability journey



Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=1080 executives.

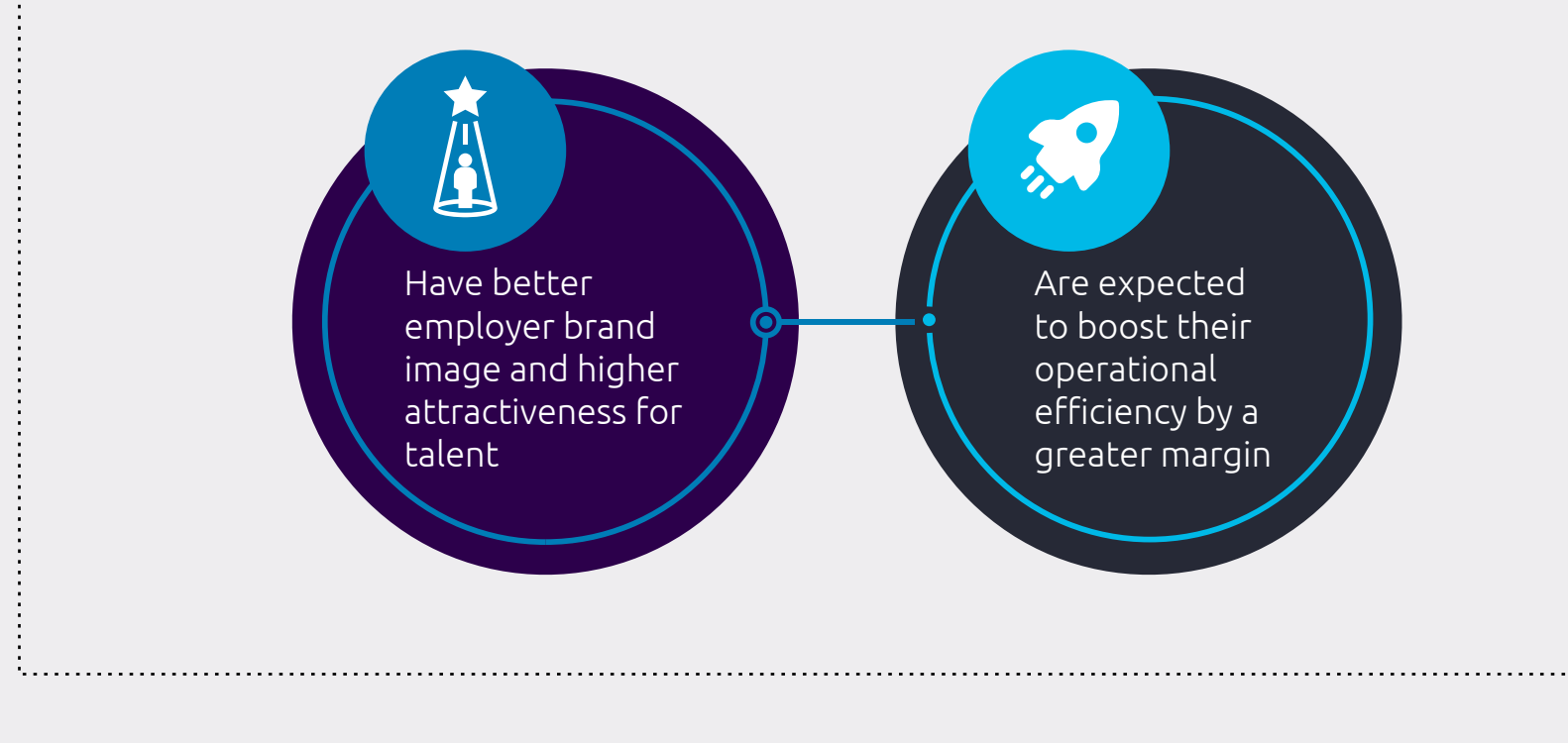
Sustainability Leaders derive higher benefits

Sustainability Leaders are reducing their GHG emissions faster



Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=183 automotive organizations, CDP, Bloomberg New Energy Outlook 2021. Emission numbers are in million mtCO₂e. Industry average = Average of all emissions, including Scope 1, Scope 2, and Scope 3 emissions of 20 large global OEMs for years 2018 and 2021 sourced from CDP (disclosed by OEMs).

Further, Sustainability Leaders benefit in terms of operations and attracting talent



Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=183 automotive organizations.

How can automotive organizations accelerate towards a sustainable future?



Source: Capgemini Research Institute analysis.

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