

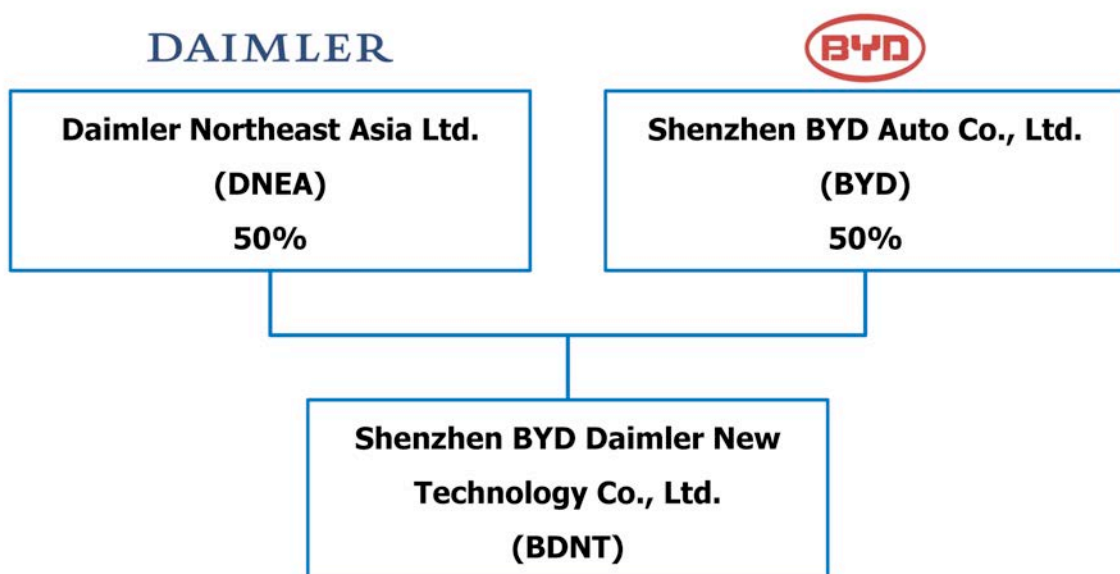
Building a new Brand in China

Arno Roehringer

Shenzhen BYD Daimler New Technology Co., Ltd., Beijing



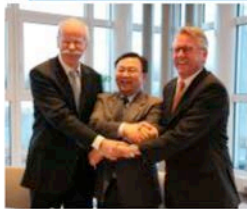
BDNT: Joint-Venture by BYD and Daimler





BDNT: Joint-Venture by BYD and Daimler

First to jointly develop and produce a new EV!
First sharing Daimler technology for EV!
First to create a local brand for China NEV market!



Cooperation Established



Prototype



DENZA Brand Launch



Concept Car Premier

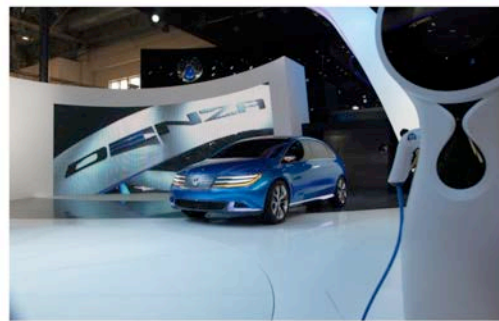
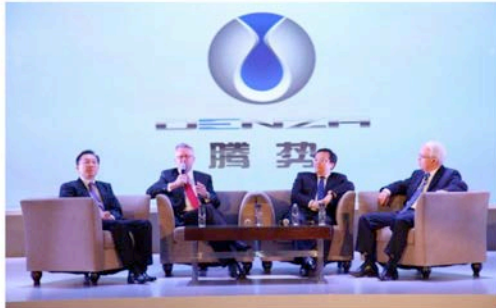


BDNT: Joint-Venture by BYD and Daimler





DENZA – Events of the Brand



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DENZA(Téng Shì)



DENZA

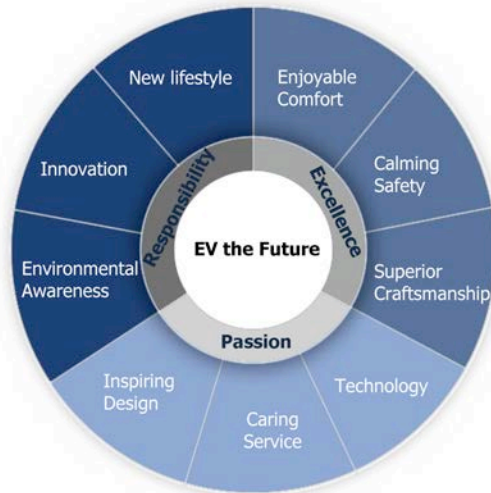
腾 势

EV the Future

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DENZA: Core Value



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China Auto Industry: Dynamic and Dramatic

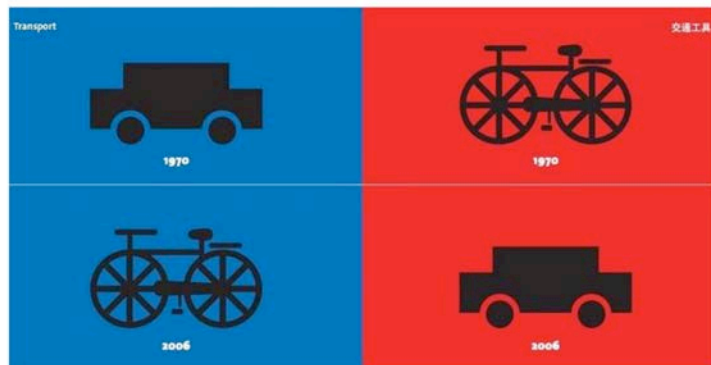
Just Now:

- Political, social and economical reasons boost the auto market
- Increasingly more tier-1 city residents drive cars to work
- NEV Market seems promising

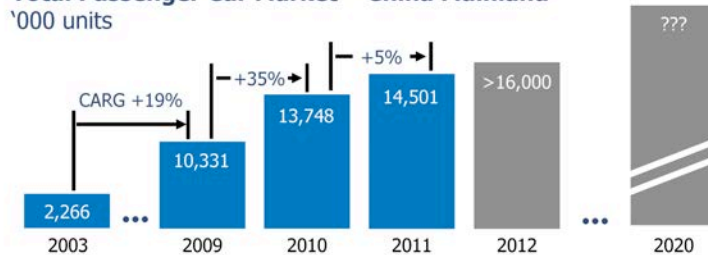
Now:

- Various municipal policies to restrict car purchase to improve traffic condition
- After strong booming in past two years, passenger car market growth in China is expected to stabilize since 2011
- NEV Market: support expected

What will happen in 2020?

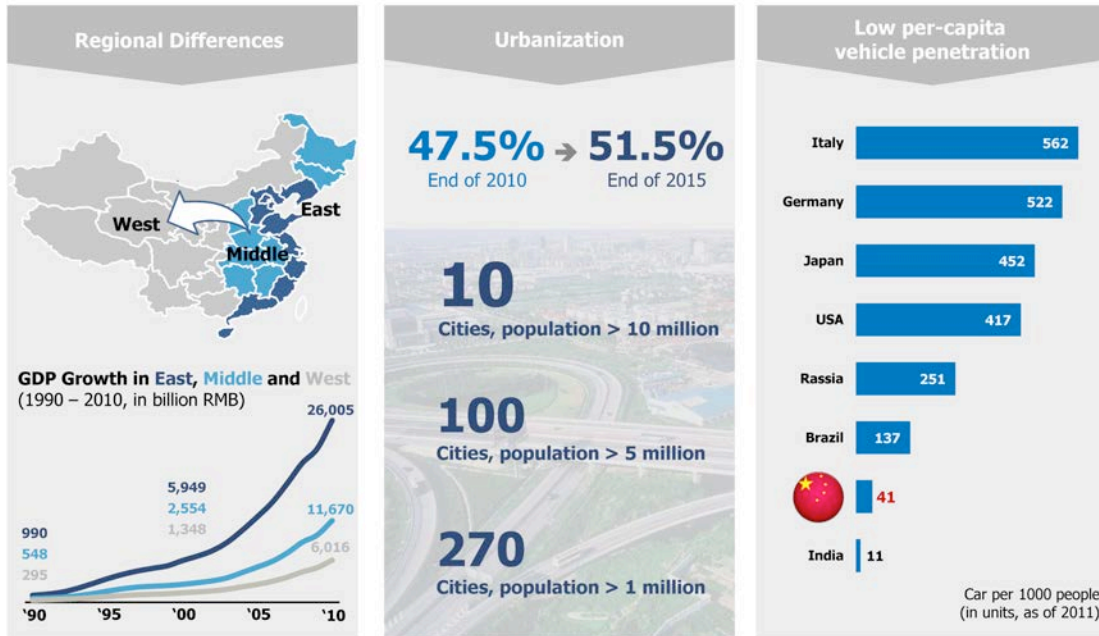


Total Passenger Car Market – China Mainland





China Auto Industry: Great potential for future growth

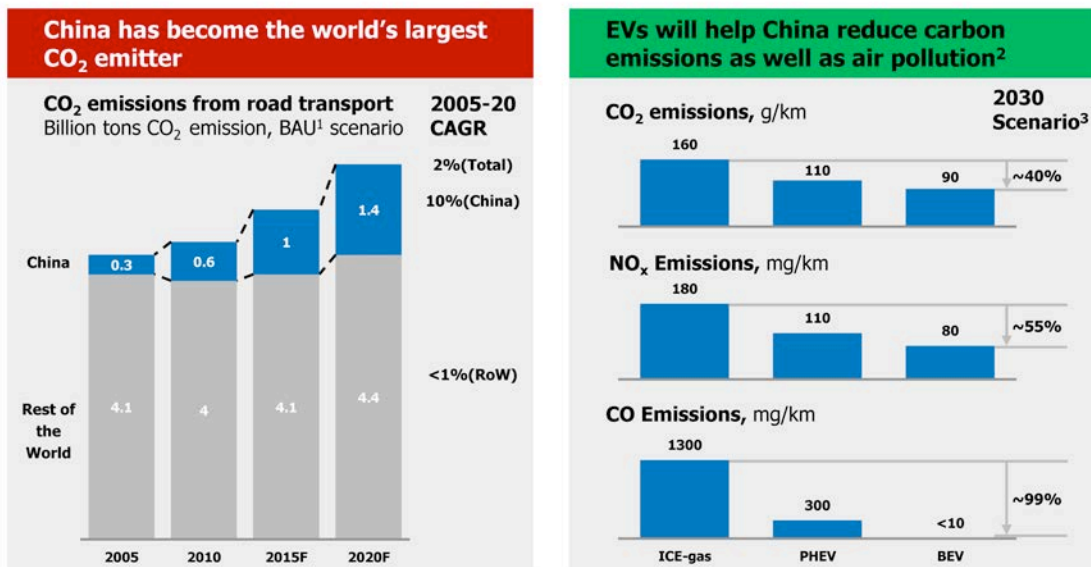


Source: China State Statistics Bureau

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NEV Market: Opportunities and Challenges



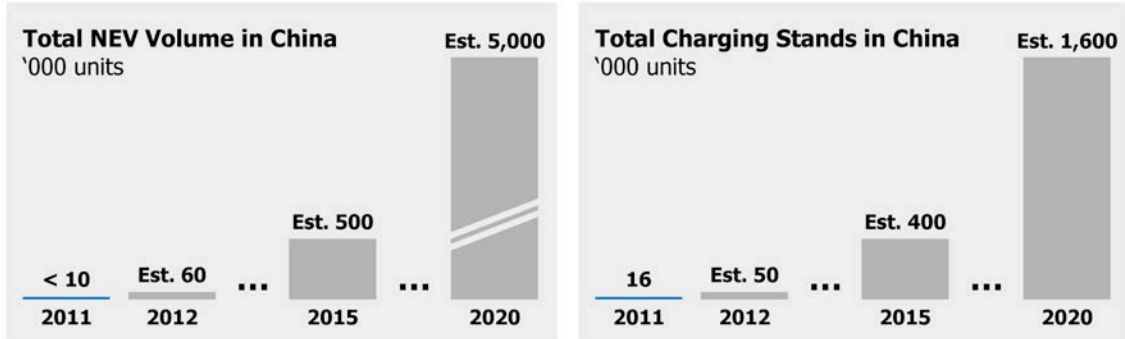
1. Business-as-usual;
 2. ICE-gas: Internal Combustion Engine; PHEV: Plug-in Hybrid; BEV: Battery Electric Vehicle;
 3. Fuel cycle emission for 2030 scenario, key assumptions include: fuel economy 5.6 L/100 km for ICE, 3.9 L/100 km for hybrid, 20 kWh/100 km for BEV, PHEV with 66% electric share; share of coal-based electricity 60%, energy efficiency of coal-based power plants 48%, 80% SCR penetration with 90% removal efficiency for NO_x, fleet in compliance with EU VI emission standards.

Source: McKinsey <Recharging China's electric vehicle aspirations>

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NEV Market: Opportunities and Challenges



Open Topics:

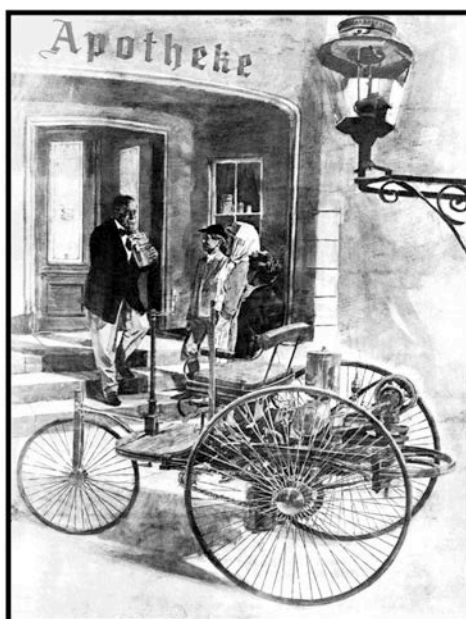
- Opinions: Plug-in Hybrid vs. Pure Electric, Battery Charging vs. Battery Swap, etc.
- Technology: Battery; Electric Motor; Electric Motor Controller, etc.
- Commerce: Development cost, Battery price, Charging infrastructure support, etc.
- Availability: less than 10 car makers in the business; Less than 10 models in market.
- Support: EV and Infrastructure Industrialization; Government Subsidy; Plate/Vehicle Restrict;

Source: Ministry of Industry and Information Technology, Ministry of Science and Technology.

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126 years ago... And now...



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From 1980 to 2012...

