

**Renault  
Group**

**LUCA DE MEO**  
CEO RENAULT GROUP

# CIRCULAR ECONOMY FULLY EMBEDDED INTO GROUP'S METAMORPHOSIS

REVOLUTIONS IN THE AUTOMOTIVE INDUSTRY



**ELECTRIC**



**DIGITAL**



**MOBILITY**



**SUSTAINABILITY**

Renault  
Group

← PREPARING TO HARNESS THE NEW VALUE CHAINS →

# CAR INDUSTRY DRAWS SIGNIFICANT SHARE FROM NATURAL RESOURCES

## STRUCTURAL CHALLENGES FROM VIRGIN MATERIAL



DECLINING RESERVE



ENVIRONMENTAL  
IMPACT



SOCIAL RESPONSABILITY



COMPLEX  
SUPPLY CHAINS



GEOPOLITICAL  
CONCERNS

## SHARE OF AUTOMOTIVE INTO GLOBAL CONSUMPTION [%]

Palladium  
& Rhodium

85%

Platinum

40%

Lithium

40%

Cobalt

24%

Nickel

10%

Copper

8%

# ENERGY TRANSITION: ADDITIONAL PRESSURE ON RESOURCES

## BEV PENETRATION IN NEW VEHICLE SALES EUROPE

8%

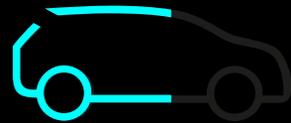


2021

TO

2030

~ 55%



## INCREASE IN RESOURCES CONSUMPTION FROM AUTOMOTIVE

LITHIUM



X7 (70%)

COBALT



X5 (53%)

NICKEL



X8 (40%)

2021

TO

2030

# NEW VEHICLES MOSTLY MADE FROM VIRGIN MATERIALS

**85%**

OF THE VEHICLE IS RECYCLABLE

YET

**< 30%**

SHARE OF RECYCLED MATERIAL  
INPUTS FOR NEW VEHICLES



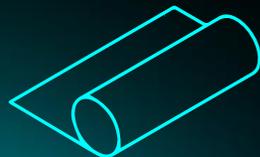
# OUR VISION: USING OLD CARS TO BUILD NEW ONES

**11m** VEHICLES REACHING  
END-OF-LIFE



**AUTOMOTIVE PRODUCTION EQUIVALENT POTENTIAL**

**> 8m**  
STEEL



**> 5m**  
PLASTICS & COPPER



# WE ARE ON THE WAY

## ALREADY RECYCLED



### STEEL

FROM  
PRODUCTION SCRAP

> **14m** TONS



### PLASTICS & COPPER

FROM  
END-OF-LIFE VEHICLES

> **12,000** TONS



### PLATINOIDS

(PLATINUM, PALLADIUM, RHODIUM)  
FROM END-OF-LIFE VEHICLES

~ **1m** CATALYSTS

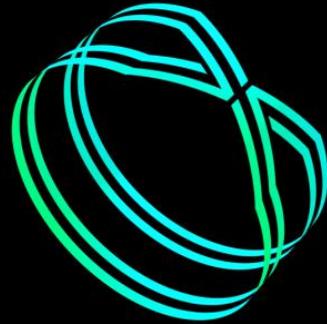
**1 YEAR**  
INDUSTRY EQUIVALENT

← ...OF STEEL CONSUMPTION  
BY CAR INDUSTRY IN EUROPE

...OF RENAULT MEGANE PRODUCTION  
NEEDS OF PLASTICS

...OF DACIA PRODUCTION NEEDS  
IN G5 + UK →

THE FUTURE  
IS **NEUTRAL**



# OUR UNIQUE SET UP OF ACTIVE ASSETS TO SERVE THE INDUSTRY

Renault  
Group

THE FUTURE  
IS NEUTRAL 



AUTOMOTIVE  
CLOSED LOOPS

€33m



METAL SCRAP  
RECYCLING

€651m



VEHICLE  
DISMANTLING

€63m

BATTERY  
RECYCLING

BATTERY-GRADE  
CLOSED LOOPS

NEW

Refactory

←—————→  
ECOSYSTEM OF CIRCULAR ECONOMY ACTIVITIES

# THE FUTURE IS NEUTRAL ADDRESSING ALL AUTOMOTIVE STAKEHOLDERS

FOR ALL CAR MAKERS, SUPPLIERS, PROFESSIONALS & INDIVIDUALS



**PRODUCTION**

WE INCREASE YOUR  
VEHICULE RECYCLED  
CONTENT RATE



**USAGE**

WE PROVIDE YOU  
WITH AFFORDABLE  
& ECO-FRIENDLY PARTS



**END-OF-LIFE**

WE DISPOSE OF YOUR OLD  
VEHICLES RESPONSIBLY



WE OFFER CIRCULAR ECONOMY CERTIFIED TRAINING & CONSULTING SERVICES

# THE FUTURE IS NEUTRAL TO DOUBLE BUSINESSES

## TRIPLE TOPLINE AND QUADRUPLE MARGINS

**X2**  
# OF BUSINESSES

**3** EXISTING

- Process scrap recycling
- ELV<sup>(1)</sup> valorization
- Post consumer material closed loop

**+**

**3** NEW

- Circular economy parts
- Battery recycling
- Training & Consulting services

**X3**  
IN REVENUE<sup>(2)</sup>



**X4**  
OPERATING MARGIN<sup>(2)</sup>

**> 10%**  
2030 MARGIN RATE<sup>(2)</sup>

(1) End-of-Life Vehicle

(2) Total scope, sum of the parts

# CIRCULAR ECONOMY SOLUTIONS THROUGHOUT THE CAR'S LIFECYCLE

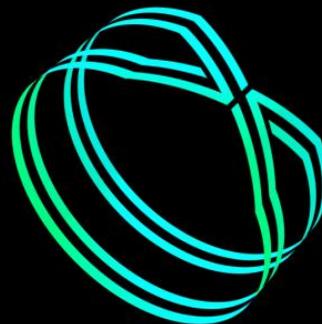
← SUPPLY → PRODUCTION → USAGE → END-OF-LIFE →



← VALUE CHAIN COVERAGE →

TODAY ~ 50%      2030 > 90%

THE FUTURE  
IS **NEUTRAL**



**JEAN-PHILIPPE BAHUAUD**  
CEO THE FUTURE IS NEUTRAL

# THE FUTURE IS NEUTRAL BASED ON 4 PILLARS



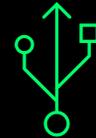
## FOCUS

OWN BRAND,  
POSITIONING,  
MISSION & VALUE



## LEADERSHIP

COMBINATION  
OF BEST-IN-CLASS  
PLAYERS



## TECHNOLOGY

ASSOCIATION  
OF AUTO, WASTE  
& DIGITAL



## ACCOUNTABILITY

DEDICATED ENTERPRISE  
& P&L WITH AMBITIOUS  
MID TERM PLAN

# OUR PORTFOLIO OF LEADERS

THE FUTURE  
IS **NEUTRAL** 



**PIONEER  
IN AUTOMOTIVE  
CLOSED LOOPS**



**GLOBAL LEADER  
IN METAL PROCESS  
SCRAP RECYCLING**



**RECOGNIZED  
GLOBAL LEADER  
OF VEHICLE DISMANTLING**

**BATTERY  
RECYCLING**

**FUTURE LEADER  
IN BATTERY  
CLOSED LOOPS**

**Refactory**

**FIRST EUROPEAN SITE DEDICATED TO CIRCULAR ECONOMY OF MOBILITY**

# THE FIRST ON-SITE CAMPUS DEDICATED TO CIRCULAR ECONOMY

## CIRCULAR ECONOMY CAMPUS AT **Refactory**



LABEL OF EXCELLENCE



EXCLUSIVE CONTENT



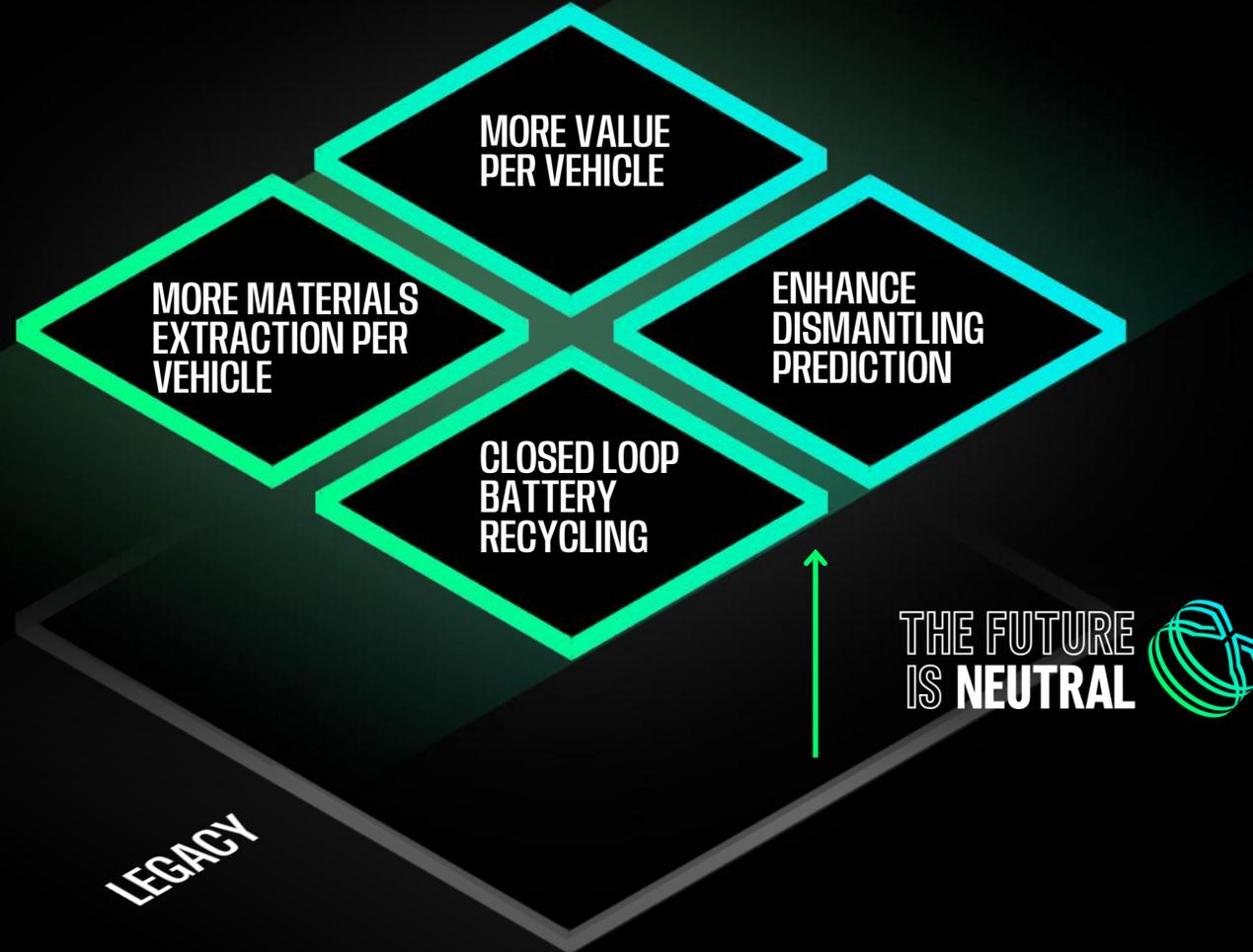
REFACTORY-FLINS

BY **2025**

**4,000**  
PEOPLE TRAINED

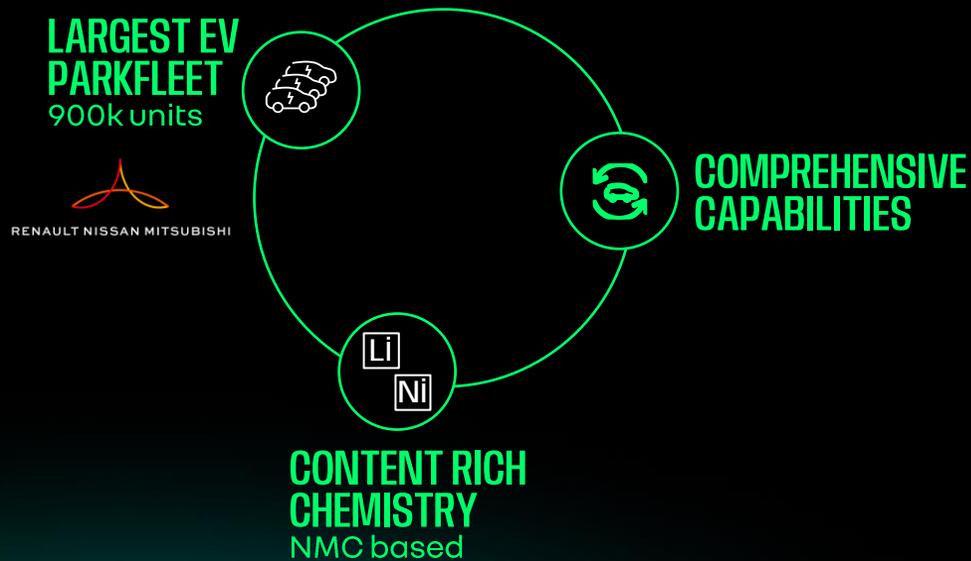
**€20m**  
INVESTED

# LEVERAGING TECHNOLOGY TO MAXIMIZE VALUE CREATION



# THE FUTURE IS NEUTRAL FRONTRUNNING IN EV BATTERY RECYCLING

## ← OUR ASSETS IN BATTERY RECYCLING →



## ← OUR CAPABILITIES →



# FUTURE IS NEUTRAL POISED TO SIGNIFICANTLY GROW IN NEXT 8 YEARS



STEEL



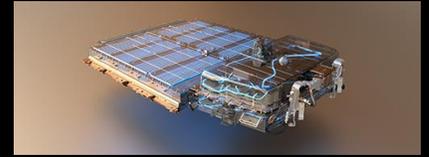
PLASTICS  
& COPPER



PLATINOIDS



END-OF-LIFE  
VEHICLES



BATTERY  
MATERIALS

RECYCLED  
IN 2021 > 1,8m TONS

> 1,300 TONS

> 300 KG

> 300 K VEHICLES

START IN 2024



TARGET  
2030 > 3m TONS

X6  
> 9,000 TONS

X3  
> 1,000 KG

X4  
> 1,200 K VEHICLES

4,500 TONS

# CAPITAL OPENING TO EXTERNAL INVESTORS

**€300m**  
SCALE EXISTING  
BUSINESSES



**€200m**  
LAUNCH NEW  
BUSINESSES

# UNIQUE CO-INVESTMENT OPPORTUNITY WITH RENAULT GROUP

Renault  
Group

INVESTOR(S)



THE FUTURE  
IS NEUTRAL



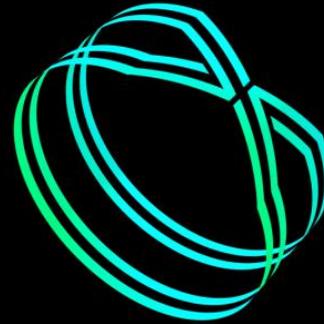
BATTERY  
RECYCLING

Refactory

FIRST EUROPEAN SITE DEDICATED TO CIRCULAR ECONOMY OF MOBILITY

**THE FIRST 360° CIRCULAR ECONOMY ENTERPRISE**  
IN THE AUTOMOTIVE WORLD

THE FUTURE  
IS **NEUTRAL**



THE FUTURE  
IS **NEUTRAL**

