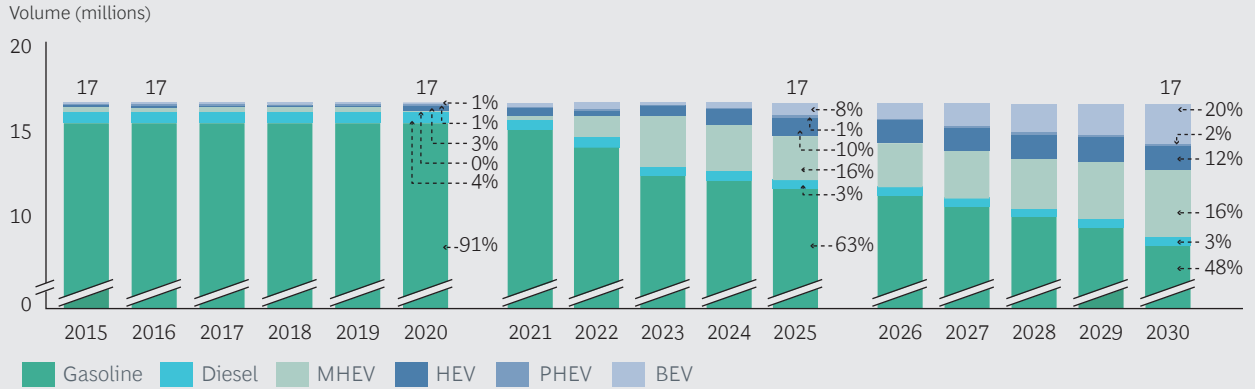


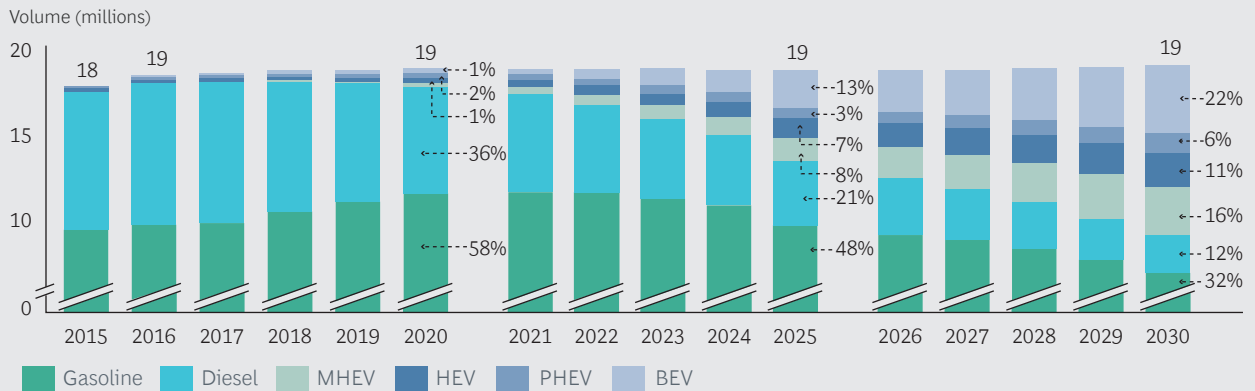
APPENDIX: BCG'S POWERTRAIN FORECASTS BY REGION

The US Market Will See Increased MHEV Growth Starting in 2021



Source: BCG analysis.
 Note: Percentages may not add to 100 because of rounding.

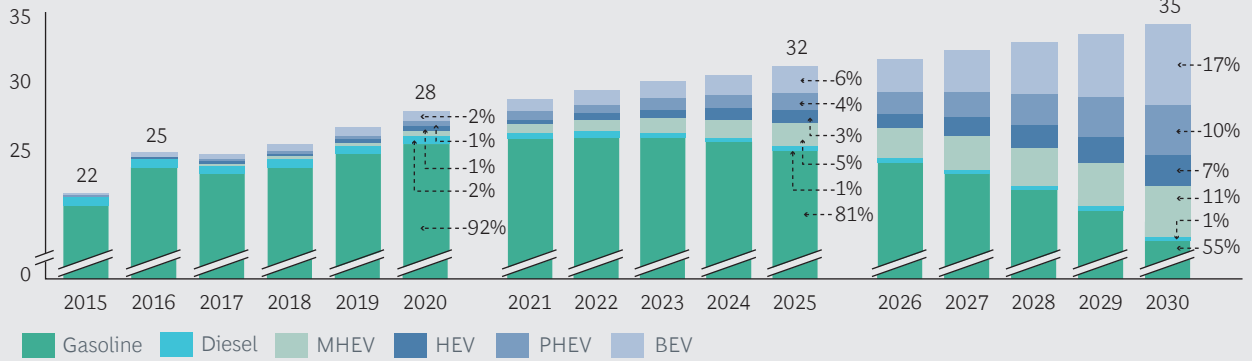
European Market Growth in BEVs Will Occur Between 2023 and 2025



Source: BCG analysis.
 Note: Percentages may not add to 100 because of rounding.

Volume in China Will Be Driven by BEVs and PHEVs

Volume (millions)

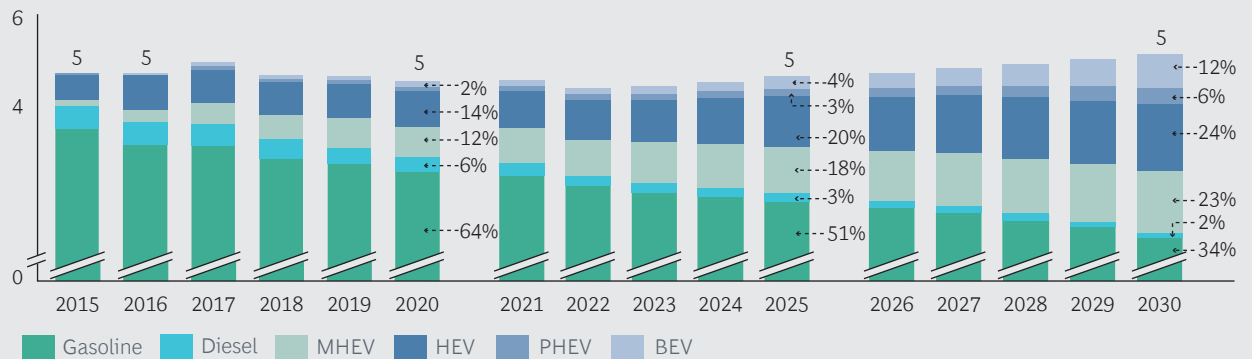


Source: BCG analysis.

Note: Percentages may not add to 100 because of rounding.

In Japan, HEVs and MHEVs Will Grow Fastest, Thanks to Driving Patterns and OEM Focus

Volume (millions)



Source: BCG analysis.

Note: Percentages may not add to 100 because of rounding.