

VOLKSWAGEN GROUP

Product & Tech Update Munich, 9 September 2025



Disclaimer

The following presentations as well as remarks/comments and explanations in this context contain forward-looking statements on the business development of the Volkswagen Group. These statements are based on assumptions relating to the development of the economic, political and legal environment in individual countries, economic regions and markets, and in particular for the automotive industry, which we have made on the basis of the information available to us and which we consider to be realistic at the time of going to press. The estimates given entail a degree of risk, and actual developments may differ from those forecast.

All figures are rounded, so minor discrepancies may arise from addition of these amounts.

Any changes in significant parameters relating to our key sales markets, or any significant shifts in exchange rates, energy and other commodities or the supply with parts relevant to the Volkswagen Group will have a corresponding effect on the development of our business. In addition, there may also be departures from our expected business development if the assessments of the factors influencing sustainable value enhancement and of risks and opportunities presented develop in a way other than we are currently expecting, or if additional risks and opportunities or other factors emerge that affect the development of our business.

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Volkswagen Group's building blocks strategy



Selected Group events to look forward to

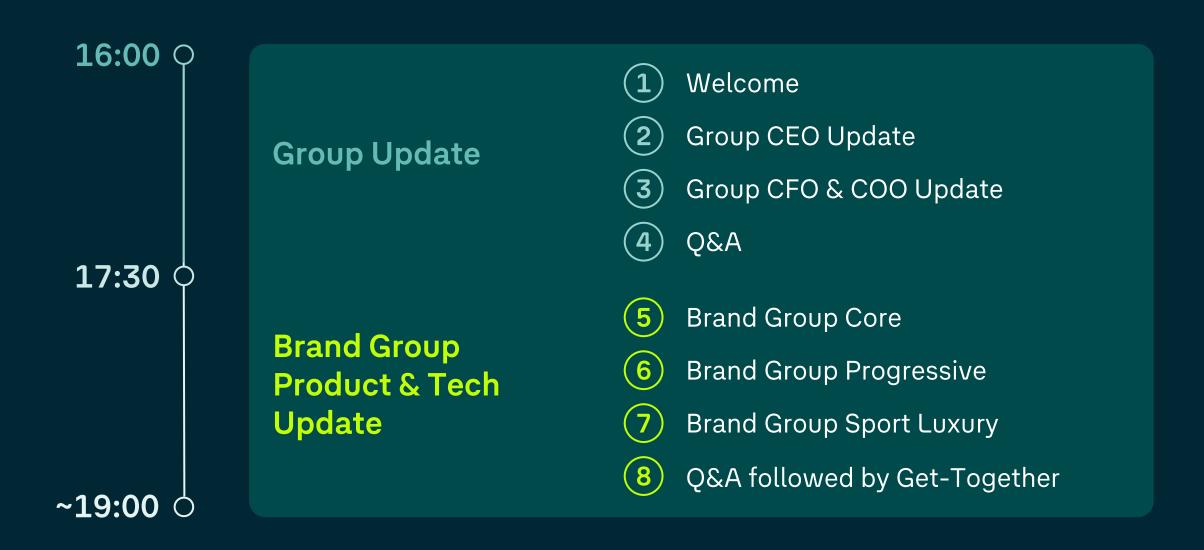




Battery Strategy Update

VW Group Mobility Day

Today's agenda



Today's presenters of the 1st part



Oliver Blume

Volkswagen Group CEO Porsche CEO



Arno Antlitz

Volkswagen Group CFO and COO

We are making progress on 'our promise' from Group CMD













Delivering on promises since June 2023



New flexible drivetrain & product strategy



Design & Quality improved



"In China, for China" Strategy



Growth plan NAR, Scout established



Redesign of software architecture



Battery strategy adapted



New platform strategy First PPE models and flexible SSF¹



Smart Technology partnerships



Performance Programs implemented



Realignment CARIAD



Active Portfolio Management



Complexity reduced Speed increased



Strong cooperation culture established



Sustainability strategy, MSCI resolved



Strong Capital Market Focus

Structural changes and altered processes



We are making progress on 'our promise' from Group CMD













Today's focus: product and technology

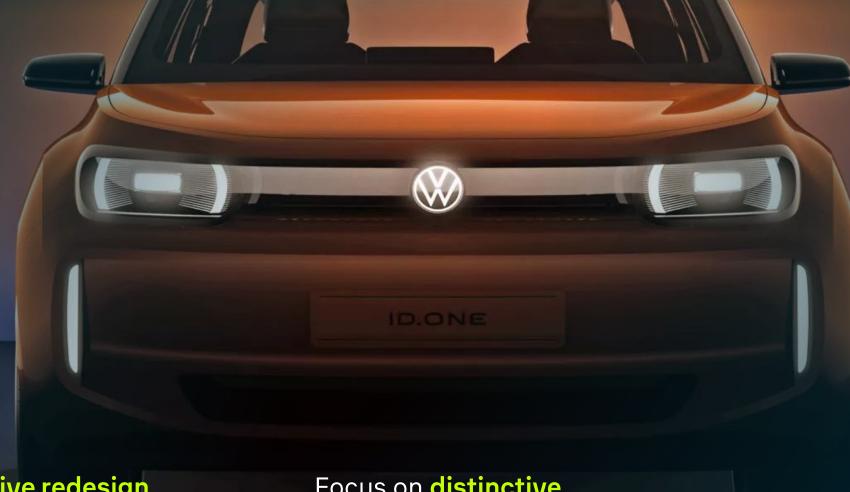
03 01 02 **UNLEASHED REGIONAL TECHNOLOGY BRANDS LEADERSHIP AT SCALE**

Today's focus: product and technology



VOLKSWAGEN GROUP

Design is a measurable value lever



Comprehensive redesign implemented group-wide

Focus on distinctive brand differentiation

Holistic brand design approach



From technology laggard to tech driver

SMARTER, FASTER, LEANER.

Strong partnerships

Speed & execution focus

Tailored local-forlocal strategies Scale for cost competitiveness

Winning the award as most innovative automotive Group



Broad-based innovation capabilities at a high technological level

Clearly leading the ranking with more than 100 innovations

Volkswagen and Audi honored as most innovative volume and premium brand

VOLKSWAGEN GROUP

Winning awards again



















Strong product momentum continues...

































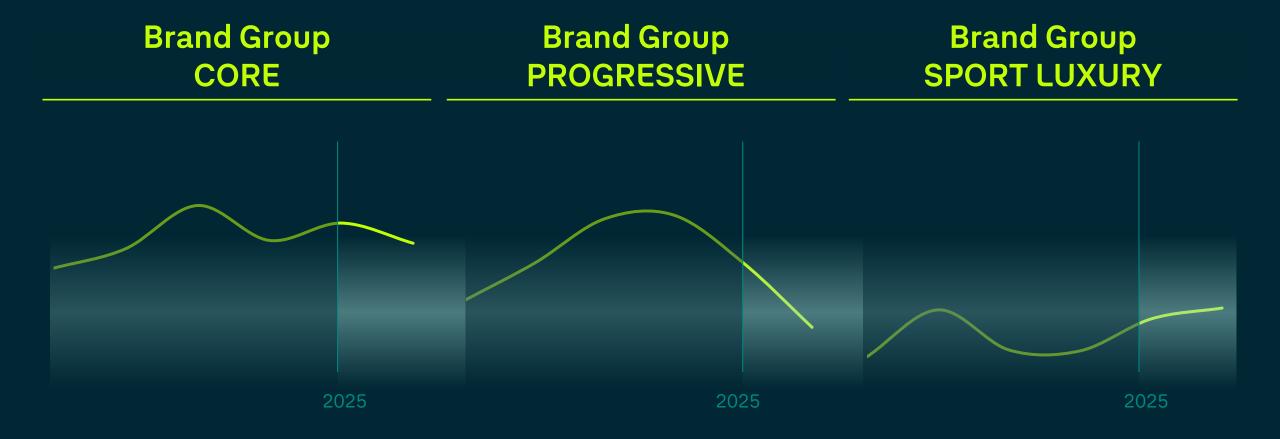








...and brings portfolio age back to well balanced levels



Fleet age lowered to highly competitive levels across Brand Groups

Renewed & attractive product line-up drives customer demand

Supporting price/mix helping to mitigate headwinds

Increasingly attractive product portfolio driving strong order intake growth YTD

2,224K

+16% vs. 2024

TOTAL

489K

+63% vs. 2024

BEV

Strong European deliveries overcompensating decline in North America



+1% y-o-y **TOTAL**

6224

+44% y-o-y

11% global BEV share

Deliveries worldwide from January to August 2025.

Today's focus: product and technology



Group Strategy - Balanced regional footprint



STRENGTHEN

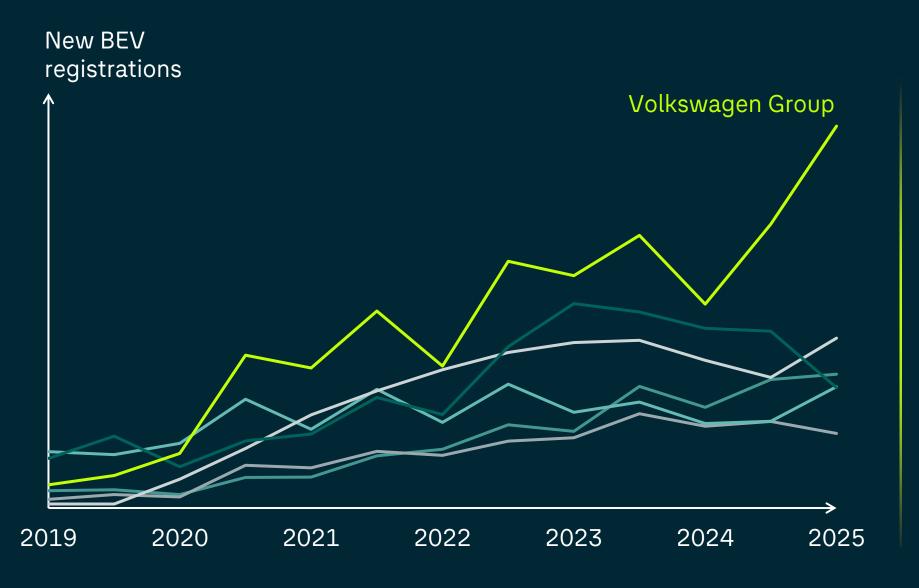
Europe

STABILIZE China

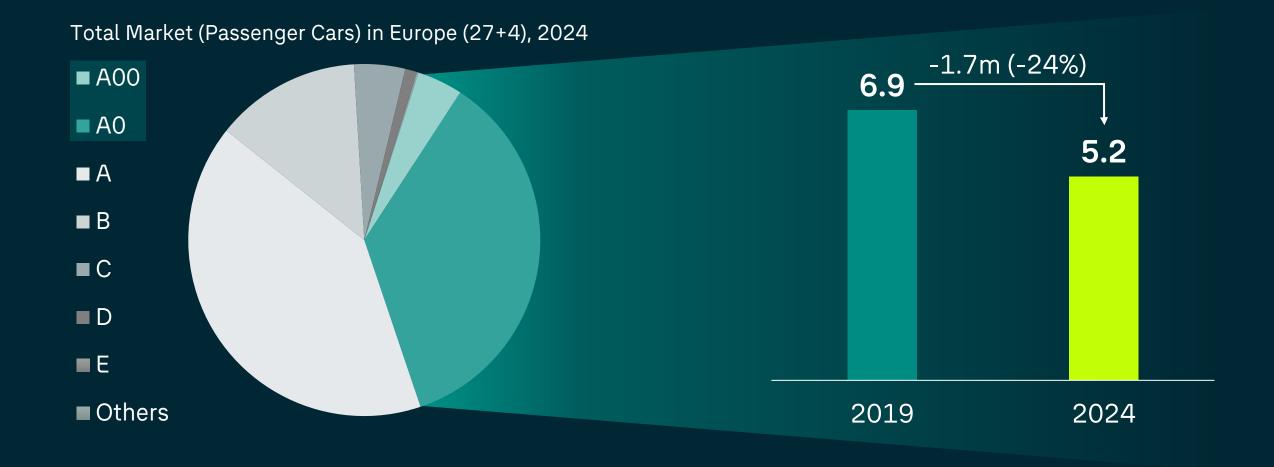
Volkswagen strengthens market leading position in Europe



Volkswagen Group leading in European BEV market



Volkswagen is further strengthening its **position** as market leader in the BEV segment with >25% market share



Growing gap in entry level segment since 2019

VW complementing portfolio with entry-level BEVs

Huge volume opportunity for ID.Every1 and Urban BEV family¹

Volkswagen sets course for growth in North America



Execution of China strategy on track



In China, for China' Strategy - From Promise to Delivery

WE ARE FAST

WE ARE SMART

WE ARE COST COMPETITVE





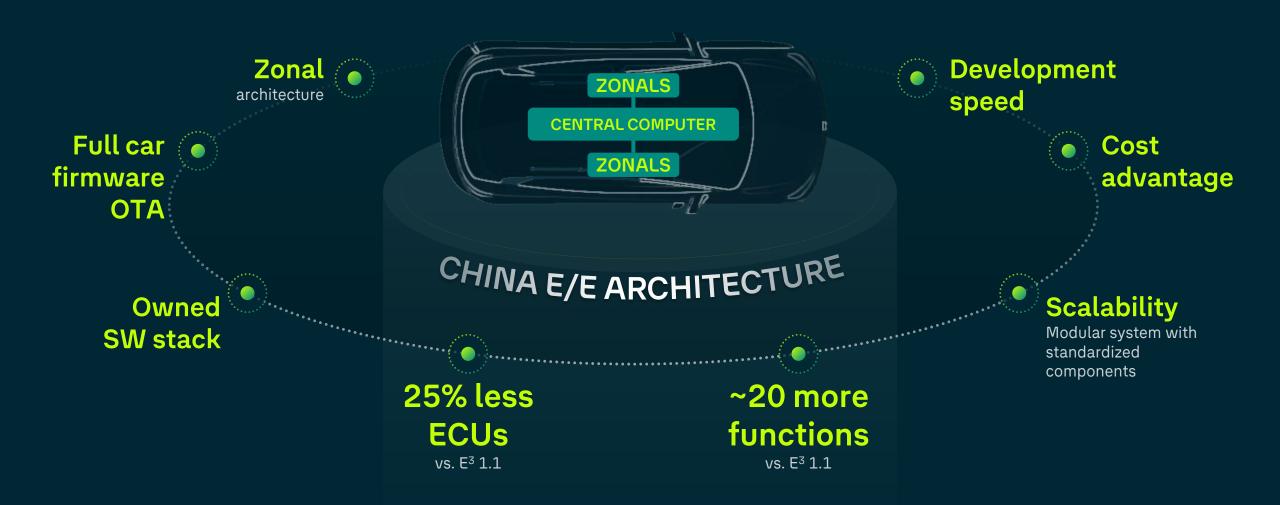


24 - 30 months time to market

1st locally developed zonal architecture + in-house developed ADAS L2++

Smart, cost-efficient and market-tailored solutions to drive cost reduction

CEA is key lever to realize our cost targets while significantly improving product substance



Highly competitive products to enter showrooms in China











5 NEW MODELS UNTIL 2030

China will remain key for Volkswagen Group



Target
Picture
2030

#1 international OEM & among TOP 3 in Chinese market

Top position in ICE; tailored, superior ICV product offerings

Strategic ambition of ~€ 3.0bn prop. operating profit^{1,2} in 2030

Significant potential beyond core regions

South America, India,
ASEAN & Middle East offer
high growth potentials

Local production combined with targeted import strategies

Flexible strategies to address diverse customer preferences

Today's focus: product and technology





New electrical architectures enable cutting-edge software solutions

RIVIAN | VOLKSWAGEN GROUP





Creating cutting-edge software and electronics architectures

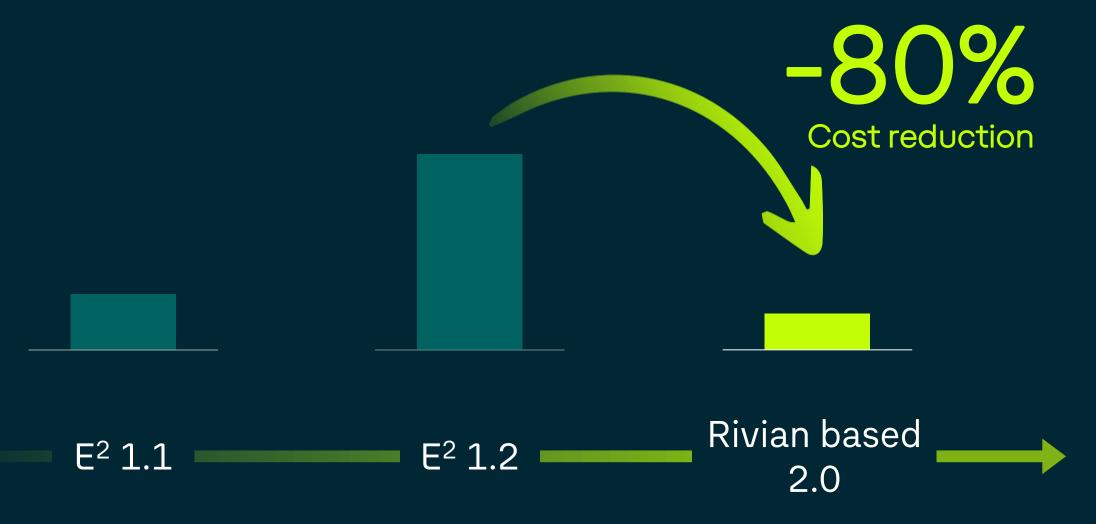
CARIAD with key role in ADAS, infotainment, connectivity, cloud data and back-end

Platform & software partnership with Xpeng: joint development of CEA¹

Software Defined Vehicle (SDV)



Highly competitive software stack at significantly lower cost [£/vehicle]



Volkswagen Group Battery Strategy: We are securing global synergies despite increasing volatilities



Ensure resilient supply amidst rising geopolitical uncertainties

Leverage economies of scale across Volkswagen Group brands

Our in-house expertise: Steer and control a future key technology

PowerCo as a partner - for a balanced mix between make & buy



TECHNOLOGY

Unified Cell Concept (UFC)

Global technology platform

FLEXIBILITY

Diverse chemistry roadmap

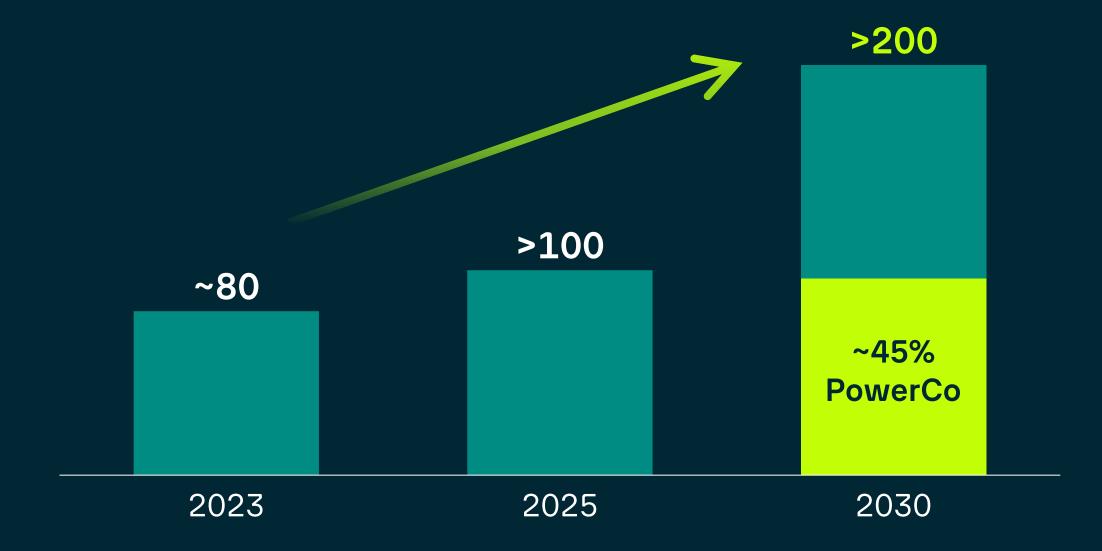
From entry segment with LFP/ sodium to high end like solid state

SCALE + COST COVERING

Low complexity for scaling

Possible coverage of 80% product portfolio

Volkswagen Group's demand of unified cells adapted to new market conditions



Closed-Loop-Approach: Boosting drivetrain efficiency through in-house system design



BATTERY



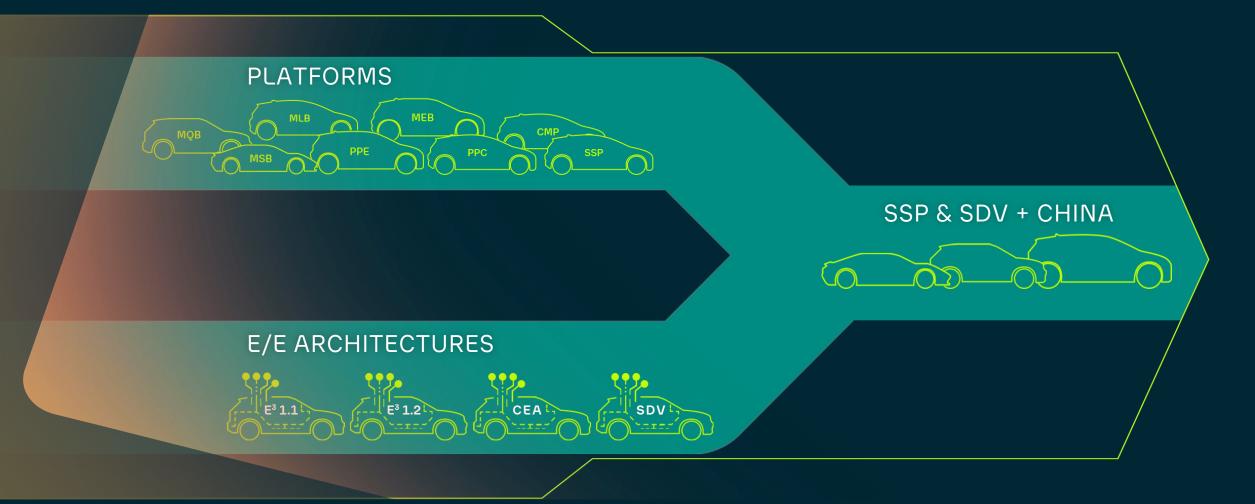
THE GLOBAL AUTOMOTIVE TECH DRIVER

INVERTER



E-DRIVE

Converging platforms and E/E architecture key



One platform - Maximum efficiency and scale

Basis for ~30 million vehicles¹ across all Brand Groups

Strong scale effects leading to lower production costs

Key Facts SSP

ス レ リ

A- to C/D-Segments

Total 30mn vehicles



6 Brands

Covering all brand Groups



33 Hats

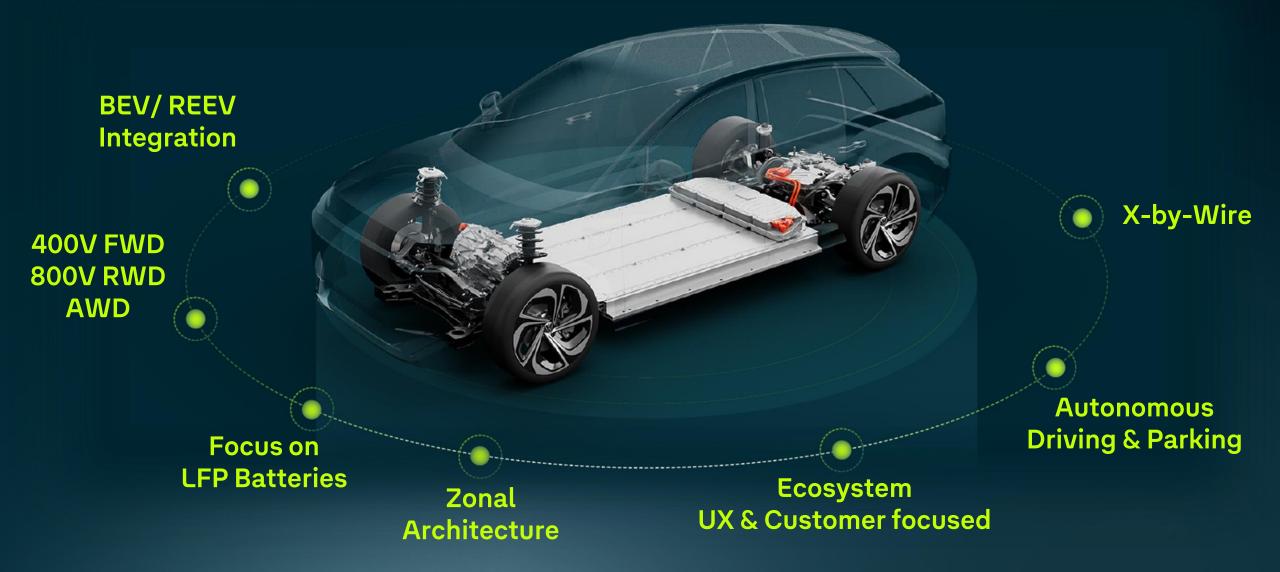
SOPs 2027 to 2032



5 Main Platforms

Regions EU/NAR; China: CSP/ CEA

Technical Specifications SSP



Success factors SSP



Competitive & attractive products



Significant cost advantages



Digital competitiveness & lifecycle capability



Optimized production concepts



Complexity reduction



Enhanced customer experience

Enhancing competitiveness with new technology fields

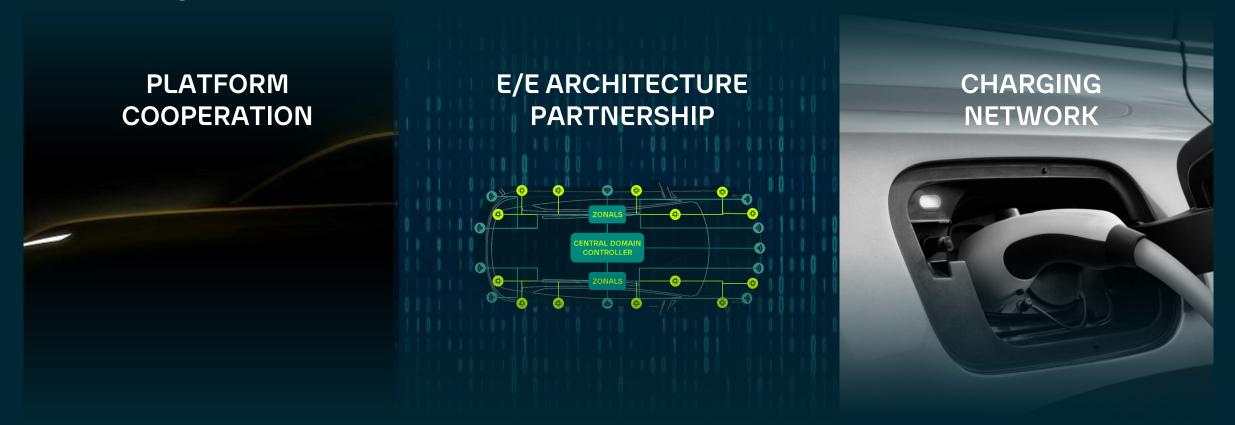


Partnering up with best-in-class solution providers

Internalizing key IP to enhance value creation and technology control

Scale technology utilizing size to unlock operational and financial leverage

Strategic Tech Partnership with XPENG strengthens Volkswagen Group's 'in China, for China' approach



Two full-sized BEVs 1st SOP in Q1 2026

Zonal E/E architecture
Drivetrain carrier done, SOP in 2025

>20k charging poles across 420 cities

CARIZON bringing Volkswagen Group to forefront of Driver Assistance Systems in China



L2+ in 2025; L2++ powered by CEA and E2E AI model in 2026 ADAS offer highly adaptable to end customer requirements

CARIZON solutions are Volkswagen reliable and safe

CARThunder accelerates the localization of In-Car software in China



Combination of competencies from
CARIAD and ThunderSoft

Further step to speed
up our digital
transformation in China

JV's Tech Scope



Software Platform Development



Connectivity



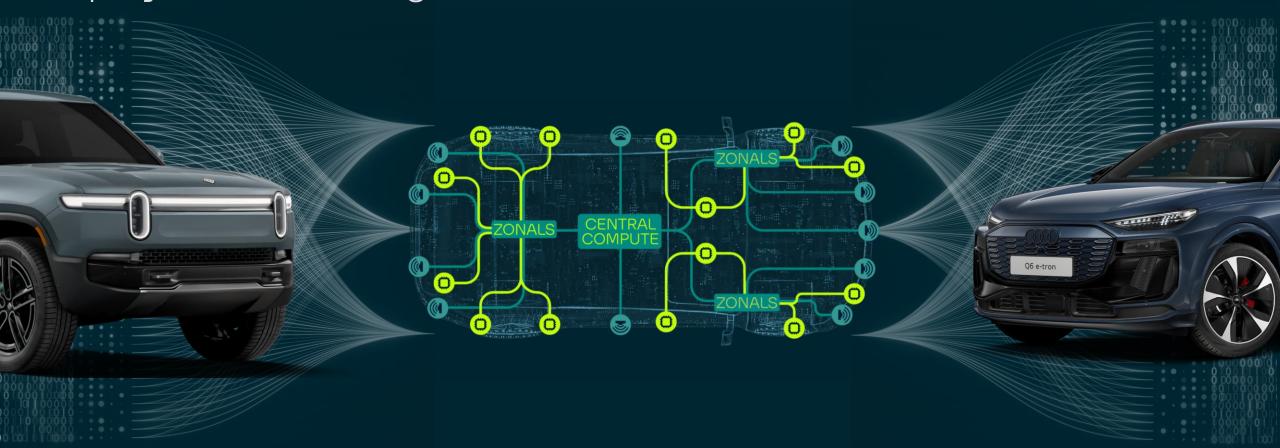
App & HMI Development



CARIAD fully owning IP

Ensuring delivery while keeping know-how in house

Rivian and Volkswagen Group Technologies accelerate deployment of next-generation SDV stack



State-of-the art E/E architectures with in-house owned SW stack

Earlier convergence & higher cost efficiency

Best-in-class over-theair update and diagnostic capabilities

MOIA provides a turnkey solution for fully autonomous mobility services



A complete system: safe, scalable, turnkey

Equipped with 27 sensors generating comprehensive 360° view of surroundings

Strategic partnership with Uber to deploy autonomous ID. Buzz

Commercial launch



- MOIA AD Ecosystem launch-ready
- ▶ 1st commercial launch with safety driver in the US

Q3 2026

Switch to fully driverless



- Launch with Uber in LA (closed user group)
- ▶ 1st commercial driverless launch

Q4 2026

Kick-off scaling



- Commercial launch of500+ AVs with Uber in LA
- Ramp-up to 1,000+ AVs in further cities globally

Q3 2027



Product Leadership

We win again - and we are just at the start





Regional Execution Strength

EU and China lead in execution while North America is our biggest opportunity for growth





Scaling with SSP

Acceleration of scale opp. across three strategic pillars: E/E Architecture, Software and Unified Cell



What to expect until year-end 2027: Strengthening robustness and resilience

Product

>50 new models across all brands incl. Urban BEV family

China

operating performance improved, turnaround and profit targets achieved

North America

resilient set-up and enhanced governance, Scout ramp-up

Software

execution of strategy (East & West), Rivian JV architecture launched

Battery

ramp-up and delivery of highly competitive unified cells

Platform

ready to launch SSP

ADAS

state-of-the-art L2+/++
offers to customers in
Europe and NAR;
China L3-ready

Production

productivity improved, capacity rightsized and progress on synergies

Financials

tangible progress in
Group margin and
Automotive net cash flows

Cost

stringent execution of group-wide performance programs

Investments

significantly reduced, paving way for lower capital intensity

Complexity

corporate structure, governance and shareholdings streamlined

Update on Group steering under current framework conditions Volkswagen Group CFO & COO Arno Antlitz

Volkswagen Group Product & Tech Update

Progress along 2023 Group CMD action fields











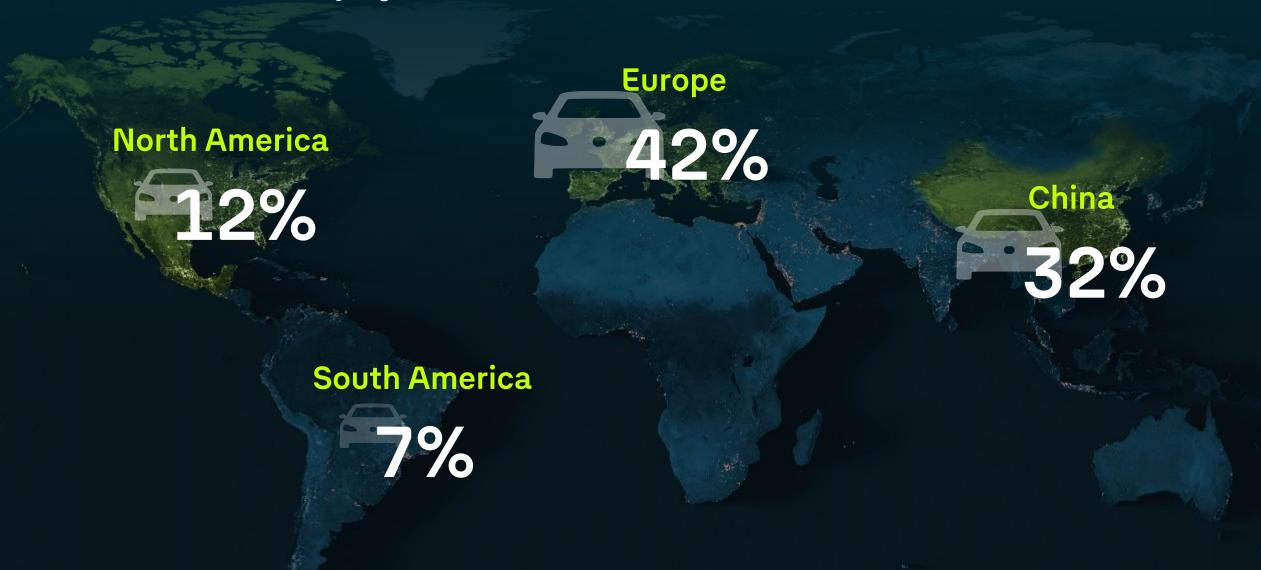


Group Strategy - creating balanced regional footprint



Group Strategy - creating balanced regional footprint

[Deliveries to customers by region, in % of total, FY2024]



North American production footprint and vehicle flows of Volkswagen Group in 2024



Increased US tariffs with significant effect on earnings

Underlying tariff regime

EU

USA

15%¹

Accounting for 60% of Group import value

USA

MEX

27.5%

Accounting for 40% of Group import value

Return on Sales impact

12-months run rate¹

~150bps

100bps

150bps

12-months run rate going forward, 50bps range depending on mitigation success

Volkswagen Group in USA at a crossroads

Concentrate on Europe in terms of vehicle specification



R&D/CAPEX focus on Europe & China







Broaden portfolio



Developing **US** concepts

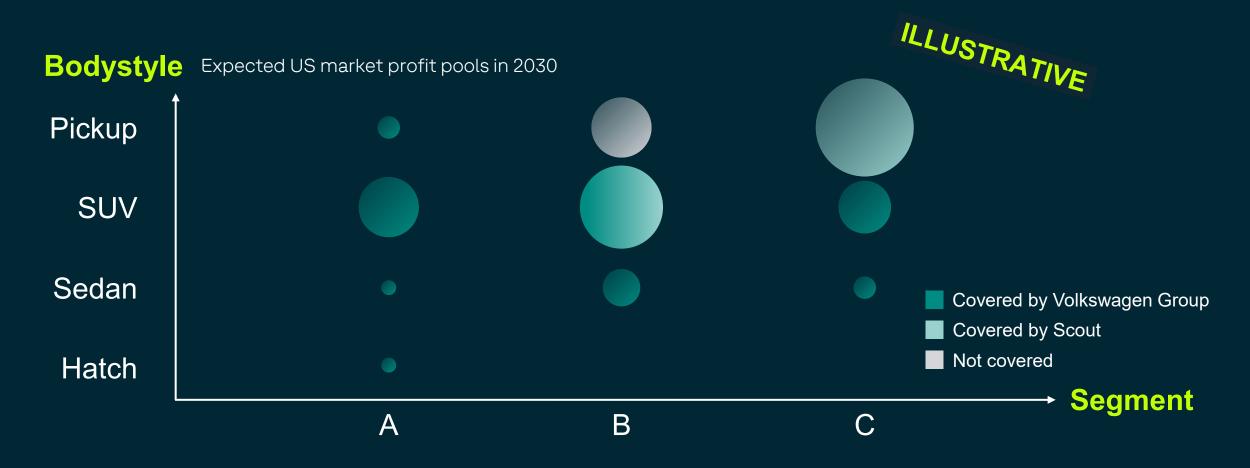


Quality focus (J.D. Power)



Further localization: Scout decided, Volkswagen and Audi under review

Scout to complement current product portfolio



Most promising future profit pools addressed

Dedicated **SUV & pick-up** portfolio to be established

Revival of iconic **Scout** brand to complement portfolio

WIN Strategy North America: Focus on Range Extender



Progress along 2023 Group CMD action fields













Fostering entrepreneurship & faster decision-making

New steering model

"Value over volume"

1

Clear focus on profitability, fixed costs & cash flow

2

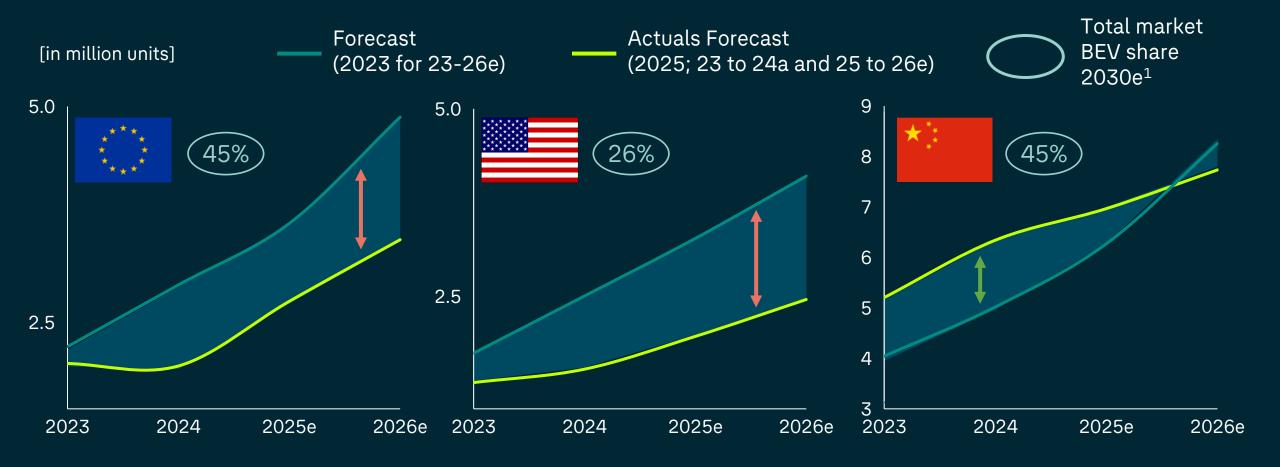
Capital efficiency & disciplined investments

3

Focused approach to equity investments

Aligned management incentivization

Significantly slower BEV adoption in core regions



EU/NAR lags expectations by cumulated ~8 million² BEVs

Fast BEV expansion in China, but slowing due to EREV trend

Slower BEV ramp-up resulted in scale inefficiencies

Flexible drivetrain strategy paying off

While convergence of BEV margins is held back by slow expansion of volumes ...



... Volkswagen Group is benefiting from its flexible drivetrain strategy



ID. Cross

Complementing portfolio in all European market segments



2. Wave

Fleet and high-end











3. Wave

ID. Polo

ID.Everv1

Entry-level





Middle of the market

1. Wave

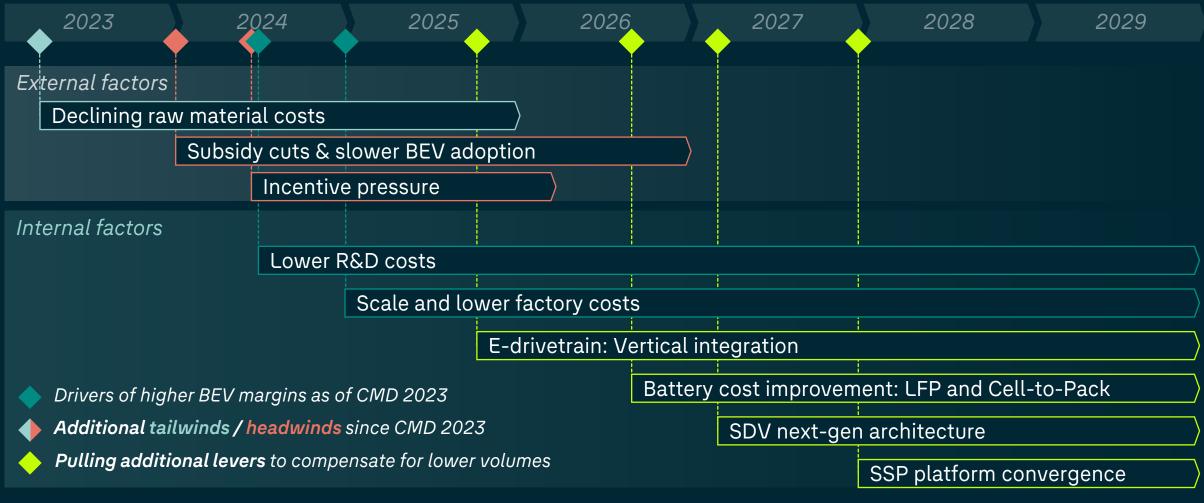


2020 ... 2024 ...

2026 ...

*already launched in 2025.

Levers towards BEV margin parity



ID. Cross Concept contribution margin already almost on par with T-Cross

Contribution margin / car [in € per car]



>80% of ICE contribution already achieved

T-Cross

ID. Cross Concept

Strong progress achieved through production set-up, LFP, rigorous cost work

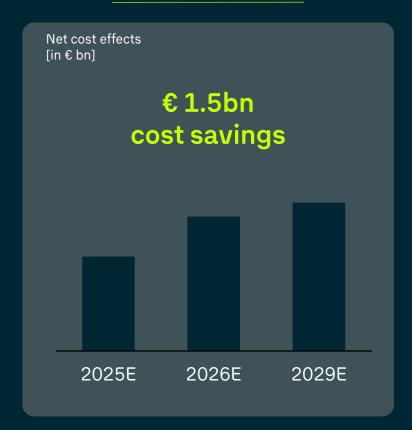
Additional levers for margin parity: E/E architecture and SSP scale

Group-wide cost programs launched



"Future Volkswagen" agreement addressing three core areas

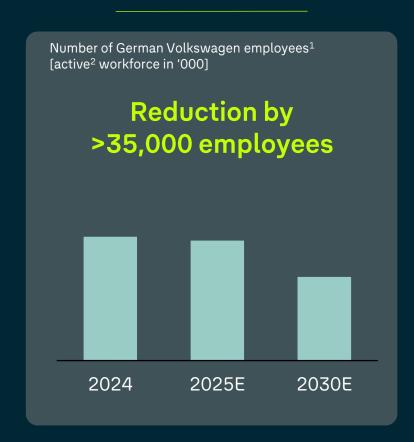
Tariff agreement



Technical capacity



Workforce



^{1.} Including Volkswagen Passenger Car brand, Volkswagen Commercial Vehicles and Volkswagen Group Components, including Volkswagen Sachsen Car Manufacturing and Volkswagen Osnabrueck
2. Excluding employees in the passive phase of partial retirement and trainees.

Group performance programs structured in 3 pillars



Stabilization of wages

~€ 2bn

short-term

Wage increases suspended, revised bonus & new remuneration systems Alignment of capacity to market realities

>1mn¹

units by YE2027

Rightsizing European capacity to optimize utilization, factory productivity & cost

Re-alignment of workforce

~50k

headcount reduction by 2030²

Realignment of workforce at German locations in a socially responsible manner

Net cost savings of more than € 6bn by end of decade



VW AG
Audi
CARIAD
Porsche

Implied Group RoS effect

>150bps

by 2030

... and we are delivering

German headcount development, 2023 to July 2025

Volkswagen AG¹ (Germany)



Volkswagen Group (Germany)



Factory cost strongly improved with further potential



Reduction of factory cost per vehicle¹ until end 2025



Further cost potential per vehicle¹ until 2026

Average factory cost of German plants lowered by >20% YoY in H1 2025

Multi-brand production and development boosts synergies and flexibility

Several **productivity improvements** benefit
factory costs in addition

1. Cost per vehicle, w/o PAG and China

Multi-brand production as source to reduce investments

ICE station wagon

VW Passat & Skoda Superb in Bratislava

€ 650mn Saving over product lifetime

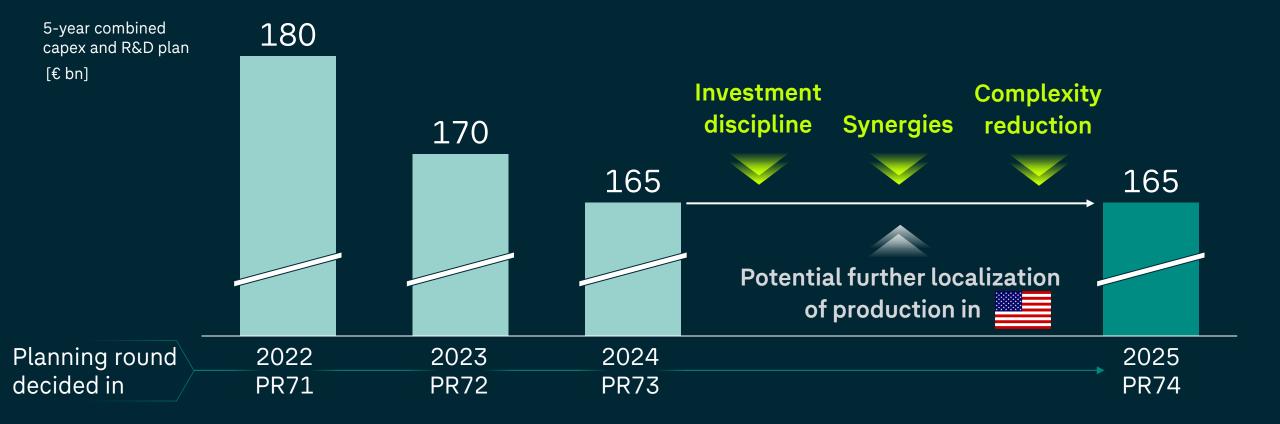
Urban BEV family

VW ID. Cross Concept & Skoda Epiq in Pamplona & VW ID. Polo & Cupra Raval in Martorell SOP in 2026

>€ 600mn Combined savings over product lifetime



€165 billion mid-term invest plan committed



Effect from potential further US localization to be offset in upcoming planning round

~1/4 of PR73 still in ICE competitiveness, supporting flexible drivetrain strategy

Focus on the core



Opening capital structure of ADMT & PowerCo

Increase of free float
TRATON shares

Evaluating options for **Everllence**

Active management of NCS¹ continuing

1. Non-controlled shareholdings

Progress along 2023 Group CMD action fields













Changes of assumptions & input factors for upcoming planning round compared to CMD 2023¹

Headwinds





Substantial increase of US tariffs

Economic outlook and lower volume growth assumptions

BEV Premium/luxury market China (Porsche/Audi)

Slower BEV volume expansion delaying margin parity

Implementation of extensive Group-wide cost programs

CO₂ / emissions regulation in EU and US

Lower share of BEVs in product mix

Flexible drivetrain strategy paying off



Planning Round in development - update of mid-term and strategic targets thereafter

Key takeaways

- 1 Successful BEV ramp-up in Europe with margin convergence in sight
- 2 New software strategy strengthens tech competitiveness while lowering costs
- 3 Convincing comeback plan for China in full implementation
- 4 Green shoots from restructuring of volume business Skoda at >8% margin
- 5 Commitment to lower invest leading to higher cash conversion mid-term
- 6 Active portfolio management in implementation with initial success

Today's presenters of the 2nd part



Thomas Schaefer

Volkswagen Brand CEO Brand Group Core CEO



Gernot Doellner

Audi CEO Brand Group Progressive CEO



Oliver Blume

Volkswagen Group CEO Porsche CEO

Brand Group Core

Volkswagen Brand & Brand Group Core CEO Thomas Schaefer

Volkswagen Group Product & Tech Update











We are the CORE of the VW Group

The most desirable brands for our customers. With top technology at competitive costs.

Unlocking value through brand diversity



Progressive modern mainstream



Functionality seeking



Image seeking



Cross-attitudinal youngster



People on a mission

Strong sales footprint in all world regions

Brand Group Core **3.31m** vehicle sales in H1 2025 (+3.9%)



Quality that matters - For our customers

















Engineered for excellence

Proven in comparison tests

Substance that drives loyalty

Europe 2027: Most desirable portfolio

ONE Brand Group

FIVE Brands

FOUR Drivetrains

FOURTY-SEVEN Models

ICE /

XHEV

Polo

Ramiq

Arona

Arona

T-Cross

Fabia

Ibiza

PHEV

PHEV

PHEV

RATOR

FABIA

RATOR

FABIA

PHEV









≥B





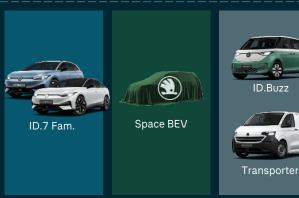
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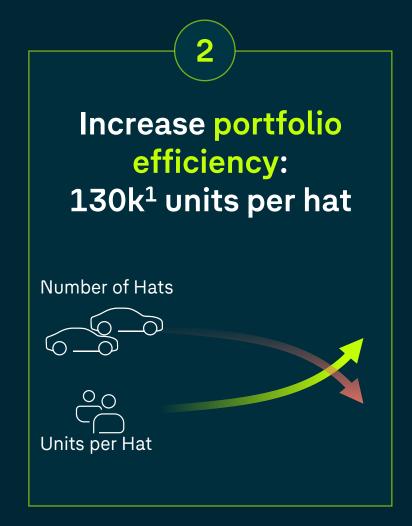


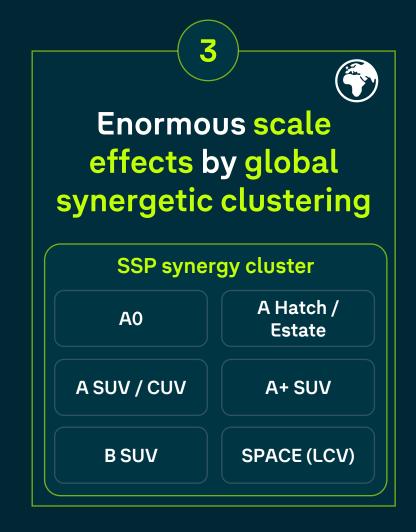




With a clear portfolio strategy moving forward 2035















Smart platforms strategy gains flexibility and optimal allocation across Brand Group Core

strengthening of today's platforms

winning with future platform



MQB for ICE & xHEV

MEB+ for EV

SSP for a NEW ERA of MOBILITY



Customer needs vary by region – Our platforms will be developed efficient by BGC team and enable us to scale globally but customize regionally

Significant improvement through value chain to enable profitable tech

✓ Switch to LFP chemistry

- ✓ Adapt modules from "c2p" to "c2c"
- New high-voltage battery generation

~40 %*

- Production efficiency gains
- ✓ Focus on performance & cost targets

~30 %*

- Simplified car configurations lower complexity
- ✓ Improvement of platform efficiencies
- Leverage brand synergies

~20 %*

ID.4 Battery Production Further material ID on SSP and logistics costs 2030

Embedding the customer voice in every product phase – backed with JD Power and NCBS insights

Project Emerge Process (PEP) **Product Definition &** Production Production Product Life Cycle Management **Product Strategy Process** Concept Development Development Preparation J.D. POWER J.D. POWER Phase 1 J.D. POWER Phase 2 J.D. POWER Phase 3 Phase 4 + NCBS **+** NCBS Evaluate customer requirements Assess technical specifications Validate physical prototypes **Direct customer feedback** cross-checked with & digital prototypes against using real customer via official survey real-world insights real customer expectations feedback **REACTIVE - QUALITY FIXING PROACTIVE - QUALITY CREATING** Conceptual changes possible without additional expenditures

Innovation for all – Bringing premium features to every segment

EFFICIENCY/ RANGE__

>700km electric range

@Future ID.4/Enyaq

Fast charging

10-80 % in <25min @Electric Urban Car Family

Low power consumption

16.4 - 13.6 kWh/100km @ID.7 Pro S TECHNOLOGY

Premium class FAS level

Travel assist with traffic light recognition

New zonal software architecture

starting with @ID.Every1

Smart Spaces effortless tech integration for partners

@VW commercial

COMFORT

Extensive boot space

> 410l @Electric Urban Car Family

2.2t towing capacity

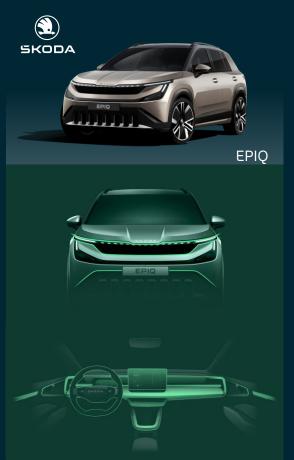
@A-SUV segment

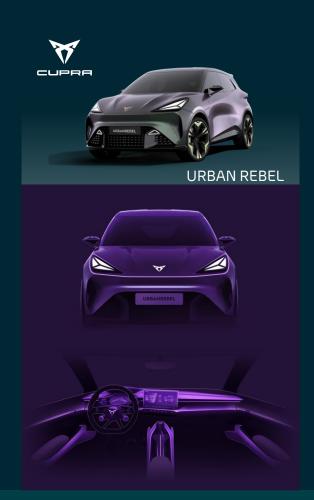
Flex Cab / L-Shape

additional cargo space @Caddy, New Transporter

Beyond Urban Electric Mobility







4 products | 3 brands |
1 platform | 2 production sites

Prices starting at ~25,000 EUR

>600m EUR synergies¹



Volkswagen ID. Polo & ID. CROSS Concept





Making premium features accessible for many

From Europe for Europe

Optimal use of space & functionality

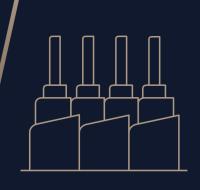


We lead

TECHNOLOGY

We are a

HIGH-PERFORMING ORGANISATION







We are a

GLOBAL BRAND

OUR

CUSTOMERS AND EMPLOYEES ARE INSPIRED









Key Takeaways of Brand Group Core





> Continuous execution to unlock full synergy potential



All Brand Group Core brands aligned on performance execution

> Brand specific programs driving financial performance and operational excellence



Consistent BEV transformation while keeping balanced ICE/ hybrid presence



Desirable products that excite our customers

Our Electric Urban Car Family sets new standards



Regional strategies powered by strong brand identities

> Leveraging distinct brand positioning to unlock growth potential

Brand Group Progressive Audi & Brand Group Progressive CEO Gernot Doellner

Volkswagen Group Product & Tech Update

Brand Group Progressive

Four iconic and strong brands











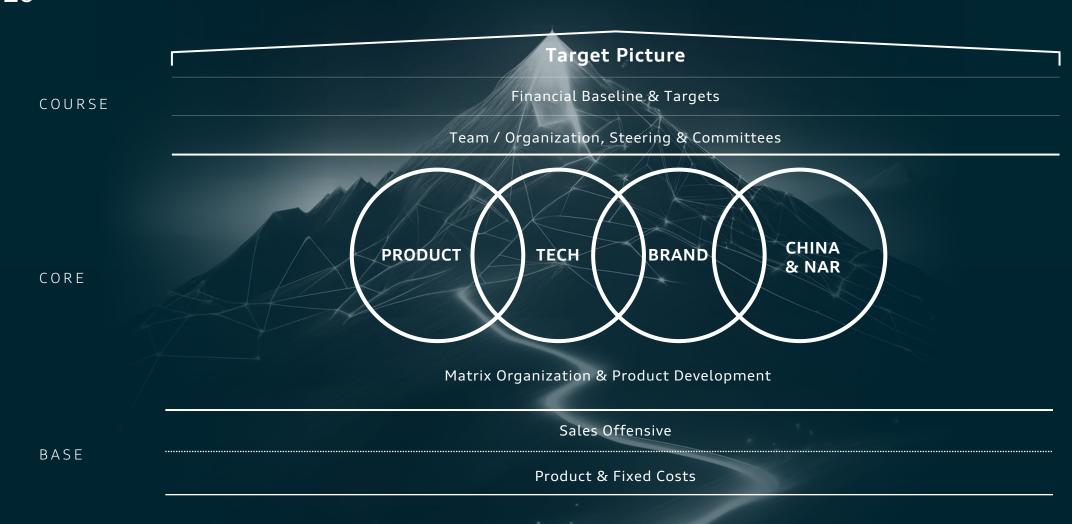
- Since 2023, decisive steps made for Audi's restructuring
- Strong product momentum under challenging market conditions
- The Concept C defines identity and embodies "The new Audi"

- Uncompromising luxury business
- Since 2025, fully hybridized model range (HPEV)
- Clear **BEV roadmap** defined
- Leader in bespoke craftmanship/ hyper-personalization
- Concept EXP 15: glimpse into the brand's electric future
- Unparalleled racing icon on the street, and recently also offroad
- High customer loyalty and enthusiastic community of Ducatisti



Audi Agenda

Clear strategic guidance and a solid foundation for a comprehensive transformation since 09/2023





Restructuring of the company is in full swing Decisive steps taken









capacity reduction of German sites

-25%

closure of the Brussels site,

-120k capacity

-7.5k

jobs cut agreed, variable pay adjusted, leading to

>€1bn

mid-term savings p.a.

reorganization in functional areas, reduction of approx.

-400/-20%

management positions

streamlined decision-making

-85%

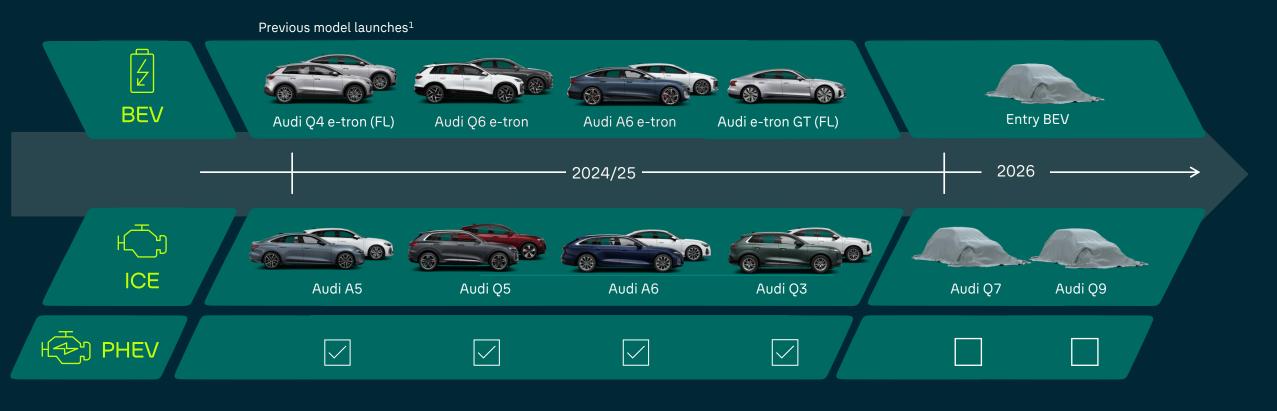
committees reduction

OM .

10 new PHEV

by the end of 2025

Largest model initiative of Audi's history More than 20 new models by the end of 2025



Broad range of

RS/S models

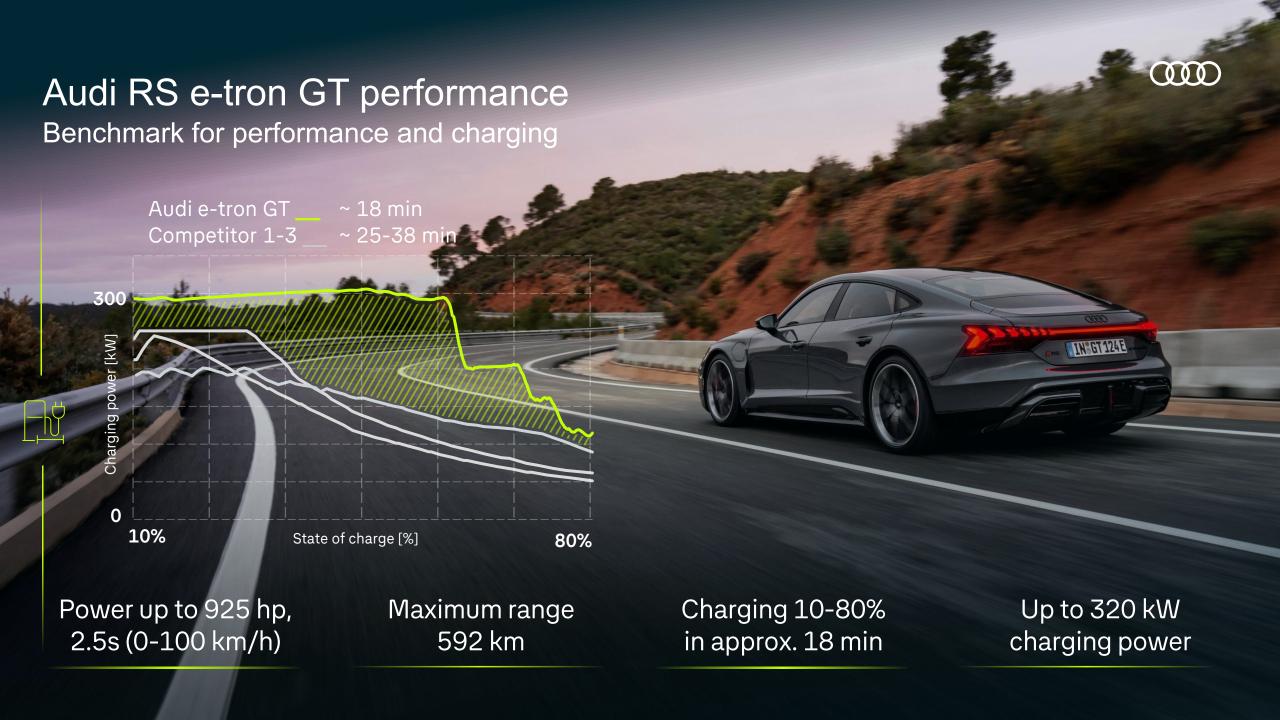
PPE/PPC

as backbone

¹ Market Introduction in Germany

Ø Portfolio age

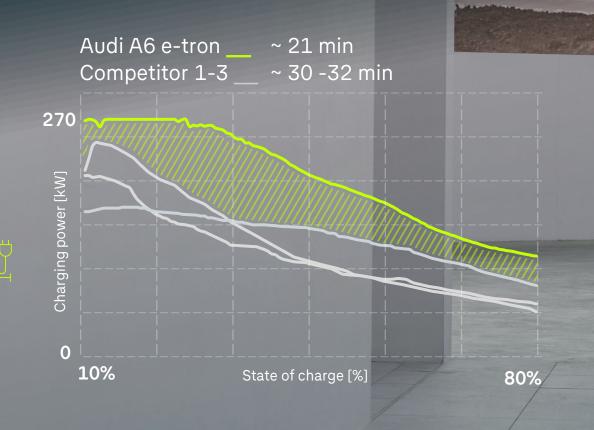
reduced by ~3 years





Audi A6/S6 Sportback e-tron

With PPE, Audi sets standards in aerodynamics and electrical range



Most aerodynamic Audi ever (Cd 0.21) Maximum range up to 756 km

System output up to 503 hp

Adding up to 310 km in 10 min





Broad drivetrain offering

Maximum flexibility in transition phase – the customer has the choice



- Convincing performance, range, efficiency and charging experience
- MHEV plus enhances performance and comfort and reduces CO₂

- Audi's refreshed PHEV-lineup offers superior efficiency and performance across all major model lines (A3, A5, A6, Q3, Q5, Q7, Q8)
- Audi Q3 e-hybrid at the IAA (electric range: 119 km)



Driving success in China with 2-brand-approach United by one core with different characters and target customers



2 different customer groups and growing profit pools

2 brands united by one core and a shared DNA

2 technologies: Strong in ICE and accelerating momentum in BEV/ICV

2 strong partners: FAW and SAIC with a unique network in China

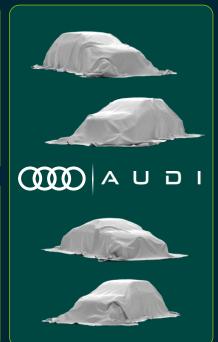


Strong product momentum in China 14 new localized models until 2027















Auto Shanghai 2025: 2 brands, 5 debuts

China-specific features/ecosystem

Technology Lead: First L2++ in ICE car BEV/ICV transformation and strong ICE business

AUDI

New AUDI brand: E5 Sportback as a pioneer We are tapping into new and tech-savvy customer segments in China



1st co-development with a Chinese OEM in premium segment

Benchmark for time-to-market

Based on the Advanced Digitized Platform (ADP)

1st gen includes 3 ICV until 2027





Audi Strategy 2030+: Mission Vorsprung

Despite progress, Audi must keep evolving to meet customer demands in challenging markets

Clarity Creates Character

Clarity in products, processes and decisions

Products | Radical reduction to the essential – putting an end to the complex or unnecessary

Products | Clear lines, elegant, simplistic interior, intuitive UI/UX and smart assistants

Organization | Focused teams with straightforward, lean processes and a strong cost culture

Character in attitude, design and output

Products | Unique, empathetic Audi character in every Audi vehicle

Organization | Result-driven team with a challenger mindset and an uncompromising execution culture



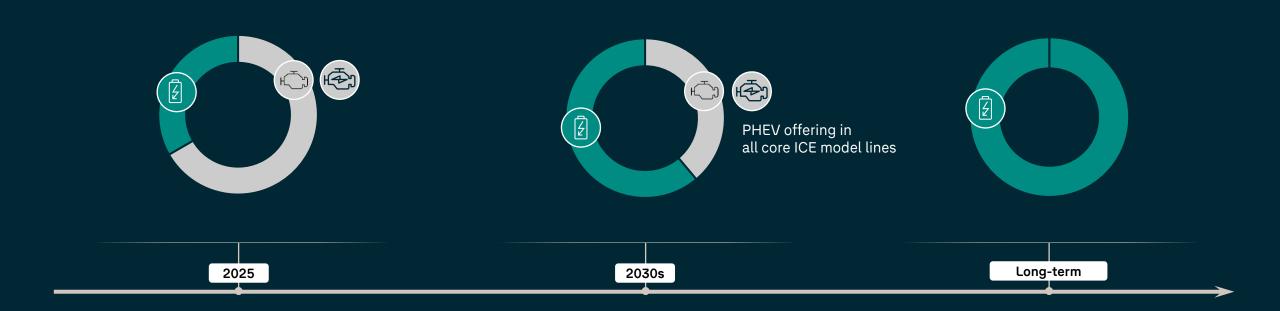
Audi Strategy 2030+

"Mission Vorsprung" outlines a clear strategic direction for Audi

	Mission Vorsprung ————————————————————————————————————						
Cornerstones	Clarity creates character Desirable brand and products with Vorsprung durch Technik		Viable scaling Volume growth plan driven by FBU and new business model (China)			Targets will be disclosed at a later stage Sustainable profit growth	
					Ambitious – yet realistic – targets for RoS and Net Cash Flow		
Future fields	Radical Leap in Design and Product Offering		Interior Experience with Al Integration		Market-proven AD Technology based on Strong Partnerships		
Enablers	Speed, Organization and Team		Future-proof Value Creation		Software & Data in Products, Company and for Customers		
Ambition	Drive for Innovation	Quality Leadership	Customer Excitement	Strong Audi Team	Cost Discipline & Group Synergies	Sustainability as Value Driver	



High flexibility on our way to a BEV-only-portfolio Streamlined FBU target portfolio with 11 BEV model lines



Maximum flexibility in transition phase

Selected icons to enhance desirability

Higher positioning (Progressive Premium)

Focus on localized products China/NAR



= Audi Lead

Streamlining platforms, amplifying Group synergies Significant reduction in complexity towards SSP and SDV

* Initial SOP Audi brand perspective

RIVIAN | VOLKSWAGEN GROUP Overview of platforms and E/E architectures (EU and NAR) ECHNOLOGIES 2027* 1st SDV BEV E³ 1.1 E³ 1.2 MLBevo Scalable System PPE O Platform (SSP) Phase-out based on мов 🛞 PPC 0000 customer demand and regulations E³ 1.2 MQBevo ICE/PHEV ICE adaption SDV under final review



Strong partnerships on the path to software-defined-vehicles

New governance for E/E Architectures offers region-specific solutions



Streamlined CARIAD governance

Strong partnerships with a clear job split

Superior features and reduced time-to-market

A fully connected interior with intelligent UI/UX

Personalized experiences – the car becomes an empathetic companion



- Clean and minimalist interior architecture
- Premium craftmanship
- High-quality materials
- Physical controls (incl. "click" feedback)



- Recognition of intentions and emotions anticipates user needs and desires
- Information and inter-action offered at the right moment
- Technology available when needed



- Immersive experience (e.g. in-car cinema)
- Integration of Audi and customer ecosystems
- Al-enabled integration of all sensors and actuators



- Orchestrator and intelligent companion in a self-learning vehicle
- The character of the Audi brand becomes tangible
- Human-like conversation creates an emotional bond between user and vehicle



- Al assistant explains autom. driving behavior – building trust
- AI enhances the driving experience (e.g. by mimicking personal driving style)
- The vehicle understands its surroundings





Audi Concept C: manifestation of a new design philosophy

Concept car embodies radical simplicity and technical precision











Brand Group Progressive | Key takeaways

- Decisive actions taken since 2023 driving Audi's turnaround
- 102 Audi's model initiative is in full swing youngest lineup among core competition
- In response to current challenges, Audi is advancing its transformation with full force
- Audi's Strategy 2030+ tackles core issues and provides a focused path forward
- Concept C paves the way for redefining Audi's design language and the company as a whole driven by clarity, focus, and a strong commitment to execution

Brand Group Sport Luxury Volkswagen Group & Porsche CEO Oliver Blume

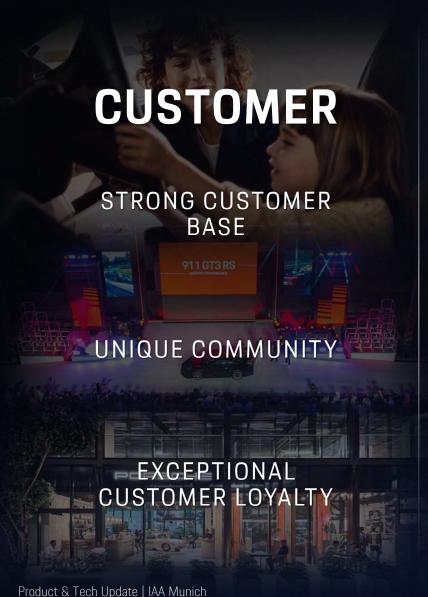
Volkswagen Group Product & Tech Update



911 Carrera 4S (WLTP): Fuel consumption combined: 11.0 – 10.5 l/100 km; CO₂ emissions combined: 249 – 237 g/km; CO₂ class: G; Status 09/2025



We have a strong foundation







Porsche Product Lineup

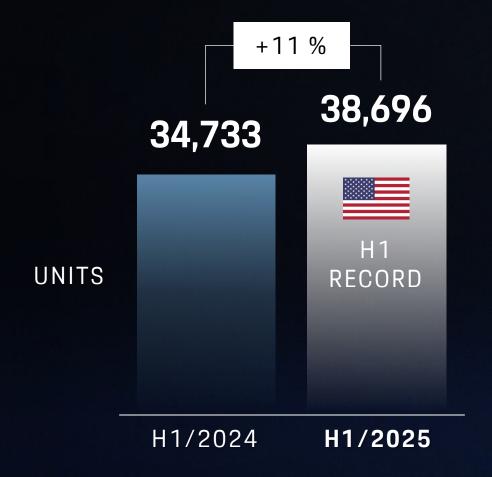


Record deliveries and strong customer base in the U.S.



Deliveries to U.S. Customer

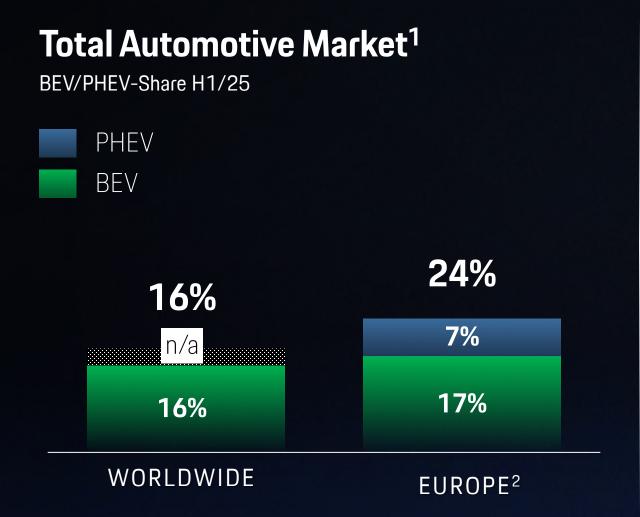
H1/25 vs. H1/24 total and per model line

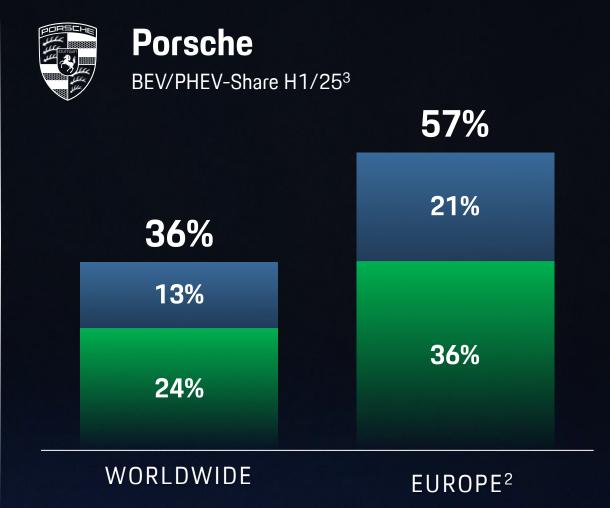


- >> Strongest 911 Market
- >> Top Ranking in J.D. Power's APEAL study
- Brand Loyalty
 no.1 purchasing reason
- Tariff mitigation in processUtilization of pricing strategies and strong brand equity



Porsche BEV/PHEV performance significantly ahead of total market





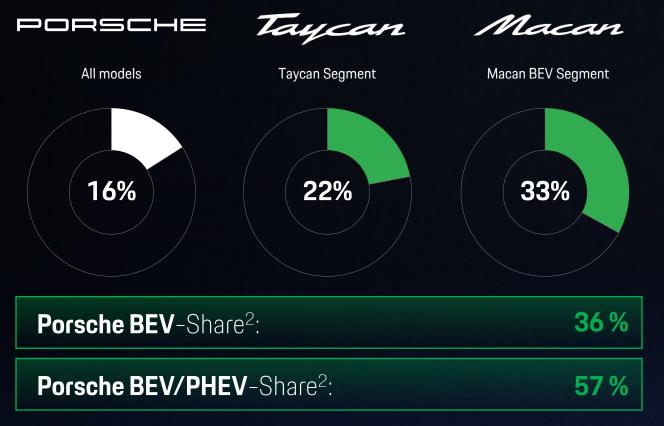
¹⁾ Source: S&P Global Mobility - MarketInsight (Data Status 06/2025), 2) Europe = EU27+4; 3) BEV/PHEV Share based on customer deliveries H1/2025



All-electric Macan and Taycan with strong development in Europe



Porsche Segment Share H1/25

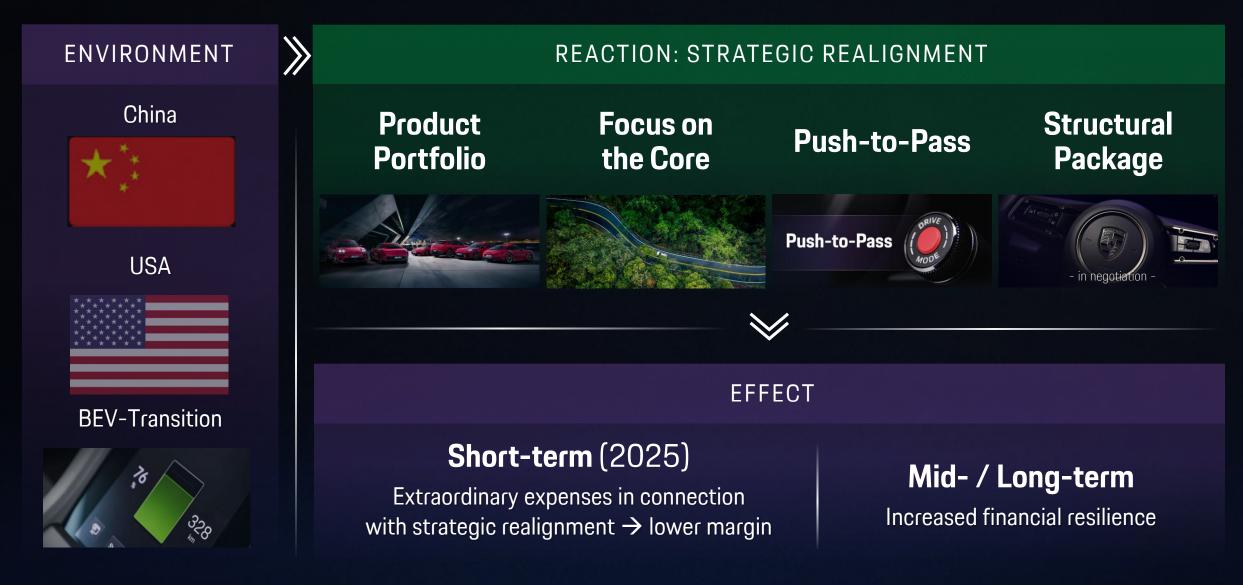


¹⁾ Source: S&P Global Mobility - MarketInsight (Data Status 03/2025); Porsche core segment shares Europe according to S&P Global, 12 months rolling (Apr 2024 - Mar 2025), considered competitors: All models comprise all key competitors based on Porsche's segmentation definition; Taycan segment (Audi e-tron GT, BMW i5, Mercedes EQE, Polestar 5, Tesla Model S, Lucid Air), Macan BEV segment (Audi Q6 e-tron, BMW iX3, MB EQC, Jaguar i-Pace); 2) Based on customer deliveries H1/2025

- Over 50% of Porsche deliveries in Europe are now electrified
- Achieving the global IPO target for 2025 in Europe on schedule
- **Exclusive segment** in the **BEV market** is developing **slower** than initially anticipated
- All-electric Macan is Porsche's bestselling model in Europe²



Extensive measures initiated to strengthen financial resilience



Extensive measures initiated to strengthen financial resilience and profitability

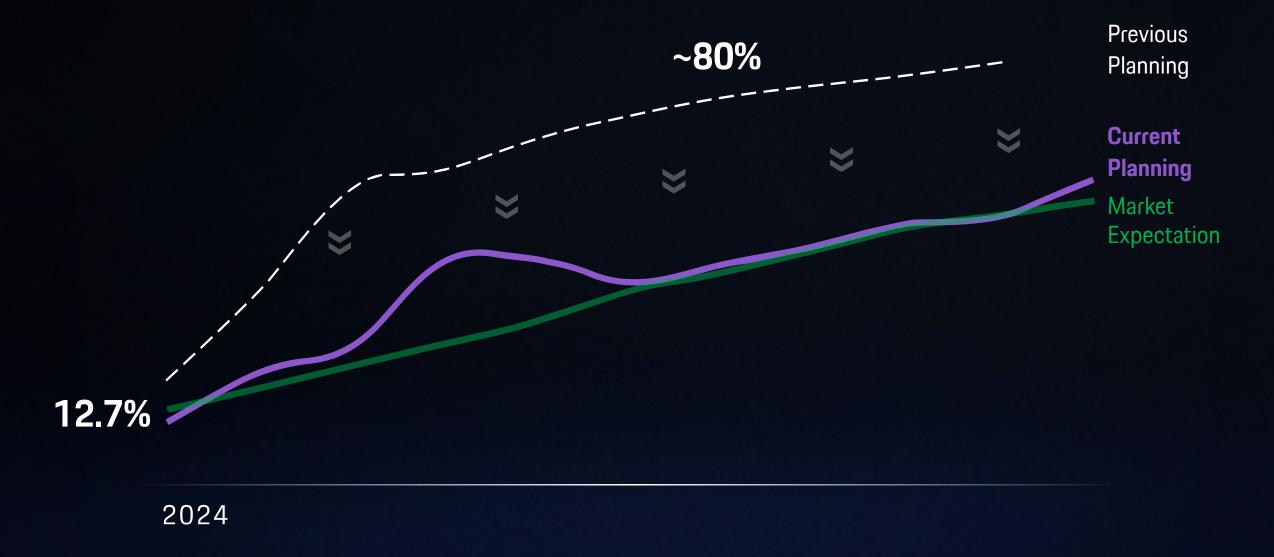


FOCUS TODAY

Balanced offering of ICE, PHEV and purely electric drives well into the 2030s



Aligning the BEV transition to market expectations



Porsche Product Strategy

schematic visualization -

ICE/PHEV

Sports Cars

SUV

Sedan

Sports Cars

SUV

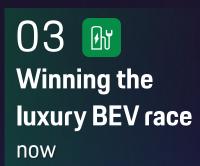
BEV

Sedan

Strengthening Brand Core

02 1 00 01

Higher flexibility ICE/PHEV



O4 Winning the luxury BEV race mid-term

O5 Winning the luxury BEV race long-term



Strong product portfolio offering flexibility in the transition

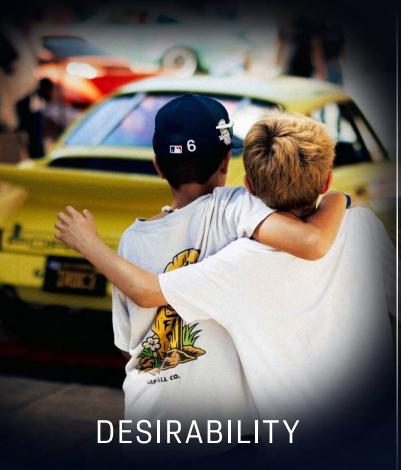




STRENGTHENING OUR BRAND CORE

911 Dakar (WLTP): Fuel consumption combined: 11.3 l/100 km; CO₂ emissions combined: 256 g/km; CO₂ class: G; Status 09/2025

Elevating Individualisation Experience







SPECIAL EDITIONS

911 Spirit 70 (WLTP): Fuel consumption combined: 10.9 – 10.7 I/100 km; CO₂ emissions combined: 246 – 242 g/km; CO₂ class: G; Status 09/2025

Exploiting the strong potential of Individualisation with clear focus on exclusivity



HALO Strategy with Lighthouse Projects that strengthen Porsche brand



ULTIMATE PERFORMANCE

OUTDOOR SPORTS AND ADVENTURES

ICONIC DESIGNS AND MATERIALS

COSMOPOLITAN DESIGN

TRACK >>



Cayenne Turbo GT - no offer in Europe; 911 Dakar (WLTP): Fuel consumption combined: 11.3 I/100 km; CO2 emissions combined: 256 g/km; CO2 class: G; Status 09/2025









240,000 €

911 Spirit 70 (WLTP): Fuel consumption combined (model range): 10.8 – 10.7 l/100 km, CO₂-emissions combined (model range): 246 – 242 g/km



TURBO S



911 Turbo S (WLTP): Fuel consumption combined: 11.8 – 11.6 l/100 km; CO2 emissions combined: 266 – 262 g/km; CO2 class: G

911 Turbo S

523 kW **711 PS**

 $0 - 200 \, \text{km/h}$

8.4 s

Top Speed

322 km/h

Nordschleife

Around 14 seconds faster than its predecessor

(7:03.92 min)

Tech Highlights

T-Hybrid (Bi-Turbo)
Active Aerodynamics



High-performance lithium-ion booster cells

Powering the T-Hybrid concept of the 911 GTS and Turbo S

Lightweight with high power density

Compact to fit into the overall vehicle architecture

Fast charge & discharge for rapid energy recovery







PORSCHE FAMILY

Cells are developed and produced in Germany by V4Smart in collaboration with Porsche Werkzeugbau Group.



Expanding ICE offering with strong updates in late 2020s/early 2030s



NEW CAYENNE



NEW 911



NEW PANAMERA

Cayenne GTS (WLTP): Fuel consumption combined: 12.7 – 12.2 I/100 km; CO₂ emissions combined: 289 – 277 g/km; CO₂ class: G; Status 09/2025 **911 Carrera GTS (WLTP):** Fuel consumption combined: 11.0 – 10.4 I/100 km; CO₂ emissions combined: 248 – 236 g/km; CO₂ class: G; Status 09/2025 **Panamera GTS (WLTP):** Fuel consumption combined: 12.5 – 11.6 I/100 km; CO₂ emissions combined: 284 – 265 g/km; CO₂ class: G; Status 09/2025





WINNING THE LUXURY BEV RACE

Taycan Turbo (WLTP): Electrical consumption combined: 20.0 – 17.7 kWh/100 km; CO₂ emissions combined: 0 g/km; CO₂ class: A; Status 09/2025 **Macan Turbo (WLTP):** Electrical consumption combined: 20.7 – 18.9 kWh/100 km; CO₂ emissions combined: 0 g/km; CO₂ class: A; Status 09/2025 **Macan 4S (WLTP):** Electrical consumption combined: 20.7 – 17.7 kWh/100 km; CO₂ emissions combined: 0 g/km; CO₂ class: A; Status 09/2025

Cayenne



Pre-series model. All information is based on preliminary internal measurements and may change until type approval. Official WLTP values will be available at market launch.

Next Level E-Performance

> 735 kW > **1000 PS**

 $0 - 100 \, \text{km/h}$

<<3s

WLTP Range

> 600 km

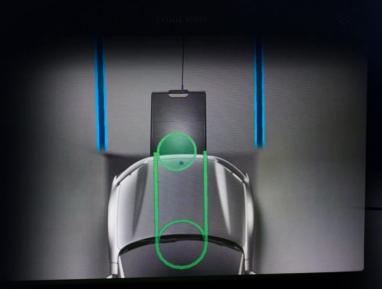
Charging Highlights

400 kW DC Charging Wireless Charging

Typical Cayenne

Offroad Capabilities
3.5 t Towing Capacity

Tech Highlight: Porsche Wireless Charging







NOVELTY AT MARKET

NEW CHARGING CONVENIENCE

INTELLIGENT PROTECTION

TECHNOLOGY FOR FUTURE PORSCHE BEV MODELS

Pre-series model. All information is based on preliminary internal measurements and may change until type approval. Official WLTP values will be available at market launch.



Porsche Tech Update

EXPAND IN-CAR TECH CAPABILITIES



Expand OTA-capabilities in upcoming launches to maximize time-to-market

EXCITE WITH CUSTOMER EXPERIENCE



Launch of market tailored Infotainment in China in 2026 to address local customer needs LEVERAGE AI
IN CUSTOMER FUNCTIONS



Massively deploy Al in customer applications to elevate personalized experience



Key Takeaways

Pro-active strategic realignment will further strengthen long-term financial resilience

More balanced drivetrain portfolio from 2028 onwards will even further enhance market positioning

Porsche offers novel tech highlights such as t-Hybrid and high-performance Wireless Charging



S&BL 911

VOLKSWAGEN GROUP

Model	Fuel consumption combined (WLTP)	Electrical consumption combined (WLTP)	CO ₂ emissions combined (WLTP)	Electric range combined (WLTP)		
VW						
Golf R	8.1 – 8.5 l/100km	n/a	184 -193 g/km	n/a		
Golf 8 GTI	7.3 – 7.1 l/100km	n/a	167 -162 g/km	n/a		
ID.3 Pro S	n/a	14,9 kWh/100km	n/a	402 – 575km		
ID.4 Pro	n/a	17.5-16.1 kWh/100km	n/a	395 – 545km		
ID.5 Pro	n/a	15.5 – 18.0 kWh/100km	n/a	492 – 567km		
ID.7 Pro	n/a	16.1 - 14.0 kWh/100km	n/a	618km		
ID.7 GTX	n/a	18.8 – 16.6 kWh/100km	n/a	584km		
Evo / Aura / Era	The vehicle is not offered for sal	le in Europe.				
ID. Buzz Pro	n/a	20.5-21.7 kWh/100km	n/a	420 - 461km		
ID. Buzz GTX	n/a	21.6 - 20.5 kWh/100km	n/a	402 – 423km		
ID. Buzz LWB Pro	n/a	21.2 - 19.5 kWh/100km	n/a	487km		
ID. EVERY1		The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review.				
ID. Polo / Cross	The vehicle is not yet offered for Consumption and emission data	r sale and is therefore not subject to Directiv a under review	re 1999/94/EC.			
Caravelle	7.9 – 7.2 l/100km	n/a	207 - 188 g/km			
Talagon	The vehicle is not offered for sal	le in Europe.				
Taos	The vehicle is not offered for sal	le in Europe.				
Tayron	0.4 – 0.8 l/100km	17.2 - 23.9 kWh/100km	9 – 18 g/km	n/a		
Tayron China Version	The vehicle is not offered for sale in Europe.					
Teramont	The vehicle is not offered for sale in Europe.					
T-Roc	5.6-6.0l/100km	n/a	128-136g/km	151		

Model	Fuel consumption combined (WLTP)	Electrical consumption combined (WLTP)	CO ₂ emissions combined (WLTP)	Electric range combined (WLTP)	
Skoda					
Epiq	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review.				
Enyaq Laurin & Klement 85	n/a	15.7 - 20.3 kWh/100km	n/a	565 - 589km	
Enyaq Sportline	n/a	15.8 – 16.6 kWh/100km	n/a	410 - 428km	
Elroq 85	n/a	15,2 - 16,6 kWh/100km	n/a	540 – 580km	
Kaylaq	The vehicle is not offered for sale in Europe.				
Vision 7S	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review.				
Porsche					
Macan S	n/a	21,1 - 17,9 kWh/100km	n/a	516 - 613km	
Taycan Turbo S	n/a	18.8-16.6 kWh/100km	n/a	558 - 630km	
Panamera 4S E-Hybrid	10.4 – 9.3 l/100km	28.6 - 26.0 kWh/100km	33 -24 g/km	83 - 91km	
Porsche Taycan GTS Sport Turismo	n/a	24.1 - 21.0 kWh/100km	n/a	424 - 490km	
Taycan 4	n/a	20.6 - 17.6 kWh/100km	n/a	478 – 559km	
Porsche 911 Carrera	10,7 – 10,1 l/100km	n/a	244 - 230 g/km	n/a	
Porsche GT3	13,8 - 13,7 l/100km	n/a	312 - 310 g/km		
Porsche 911 Turbo S	11,8 - 11,6 l/100 km	n/a	266 - 262 g/km		
Porsche Cayenne Electric	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review				

Model	Fuel consumption combined (WLTP)	Electrical consumption combined (WLTP)	CO ₂ emissions combined (WLTP)	Electric range combined (WLTP)	
Bentley					
Continental GT Speed	10.3 l/100 km	28.1 kWh/100km	29 g/km	n/a	
Bentayga Speed	14.7 l/100 km	n/a	335 g/km	n/a	
Lamborghini					
Revuelto	11,86 l/100km	n/a	276 g/km	n/a	
Urus S	14.1 l/100km	n/a	320 g/km	n/a	
Urus SE	2,08 l/100km	39,5 kWh/100 Km	51 g/km	n/a	
Temerario	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review.				
Seat / Cupra					
Born	n/a	14.9 - 16.7 kWh/100km	n/a	up to 594km	
Tavascan VZ 250 kW 77kWh	n/a	16.6 kWh/100km	n/a	up to 522km	
Terramar VZ 1.5 e-HYBRID 200 kW	0,4-0,5 l/100 km	7,6-19,0 kWh/100 km	10-12 g/km	n/a	
Raval	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission dat review.			nsumption and emission data u	

Model	Fuel consumption combined (WLTP)	Electrical consumption combined (WLTP)	CO ₂ emissions combined (WLTP)	Electric range combined (WLTP)		
Audi						
A5	7.7 – 4.8 l/100km	n/a	176 - 125 g/km	n/a		
A5L	The vehicle is not offered for sale in Europe.					
Concept C	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review.					
AUDI E5	The vehicle is not offered for sale in Europe.					
Q4 e-tron 55	n/a	16.8 - 19.5 kWh/100km	n/a	449 - 523km		
Q5	7.9–5.9 l/100km	n/a	180-148 g/km	n/a		
Q6L e-tron	n/a	17.5 - 18.4 kWh/100km	n/a	566 – 598km		
Q8 55 e-tron	n/a	20.6 - 24.4 kWh/100km	n/a	460 - 595km		
S5 Avant	7.5-7.9 l/100km	n/a	169-180 g/km	n/a		
A6 Avant e-tron	n/a	17.5 - 14.4 kWh/100km	n/a	520 – 720km		
S6 Avant e-tron	n/a	17,2-17,0 kWh/100km	n/a	627 - 720km		
Scout						
Terra	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and emission data under review.					
Traveler	The vehicle is not yet offered for sale and is therefore not subject to Directive 1999/94/EC. Consumption and					
Jetta (China)	emission data under review.					
Jetta (VA7, China)	The vehicle is not offered for sale in Europe.					