



**VOLKSWAGEN GROUP** | **Product & Tech Update**  
Munich, 9 September 2025



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.

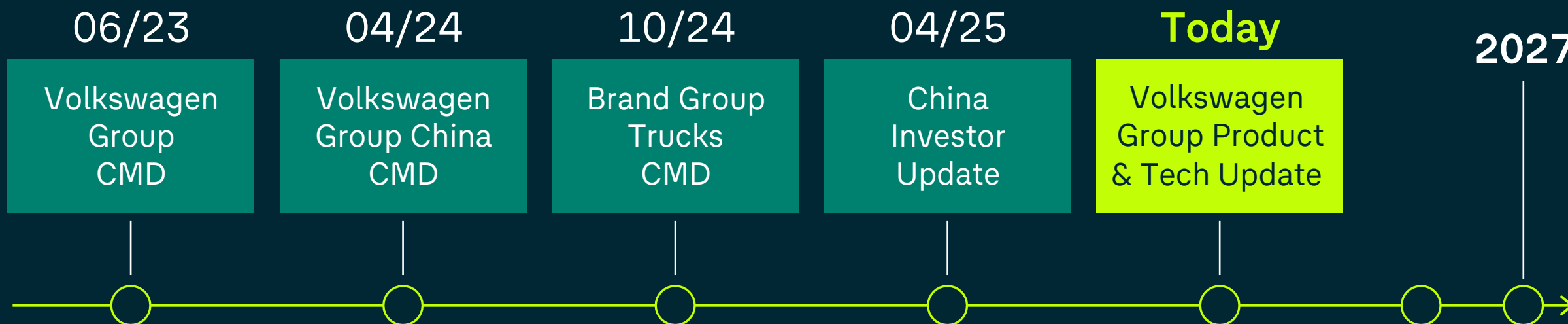
All figures are rounded, so minor discrepancies may arise from addition of these amounts.

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

16:00 ○  
17:30 ○  
~19:00 ○

## Group Update

- ① Welcome
- ② Group CEO Update
- ③ Group CFO & COO Update
- ④ Q&A

## Brand Group Product & Tech Update

- ⑤ Brand Group Core
- ⑥ Brand Group Progressive
- ⑦ Brand Group Sport Luxury
- ⑧ Q&A followed by Get-Together

# Today's presenters of the 1<sup>st</sup> 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



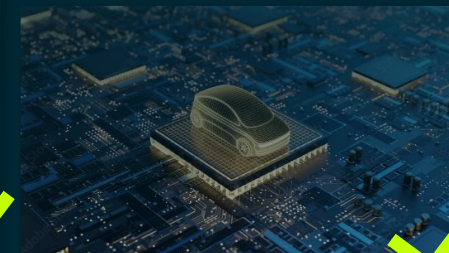
Design & Quality improved



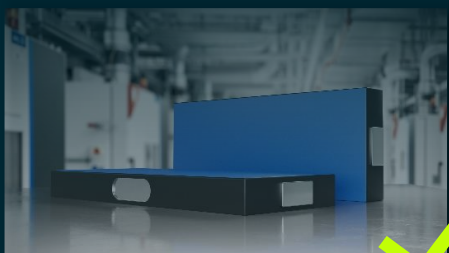
"In China, for China" Strategy



Growth plan NAR, Scout established



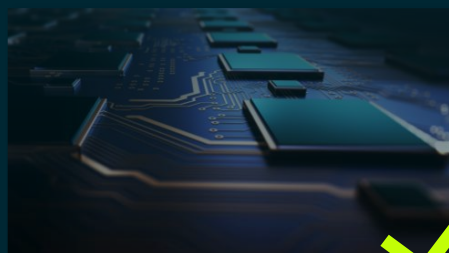
Redesign of software architecture



Battery strategy adapted



New platform strategy  
First PPE models and flexible SSF<sup>1</sup>



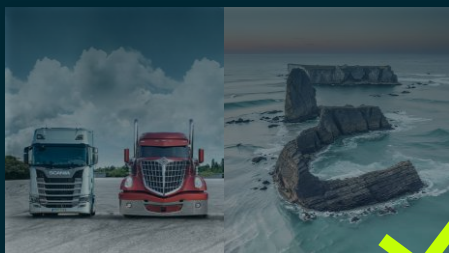
Smart Technology partnerships



Performance Programs implemented



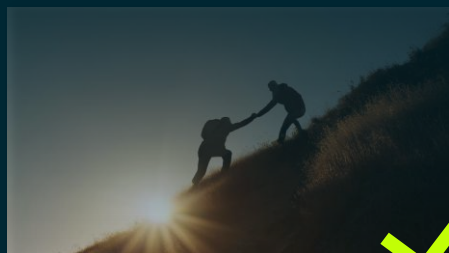
Realignment CARIAD



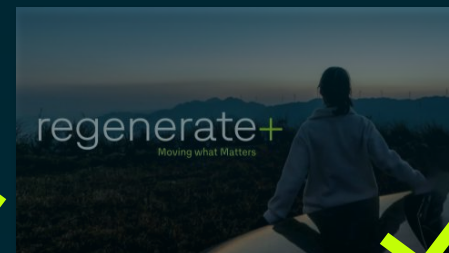
Active Portfolio Management



Complexity reduced  
Speed increased



Strong cooperation culture established



Sustainability strategy, MSCI resolved



Strong Capital Market Focus

1. Software Stack Family

# Structural changes and altered processes



## Group steering

Group Strategy  
2035 implemented ✓

Strengthened independence  
for regions ✓



## Brand Groups & Regions

Brand Groups  
strengthened ✓

Matrix management  
implemented at Group level ✓



## Technology

Software Governance  
defined ✓

Technology committees  
realigned ✓



## Cross section & use phase

Design steering realigned  
within the Group ✓

Quality steering implemented  
across the Group ✓



## Lean corporate

Group complexity  
reduced ✓

Reduced number  
of committees ✓



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



01

## UNLEASHED BRANDS



02

## REGIONAL LEADERSHIP



03

## TECHNOLOGY AT SCALE



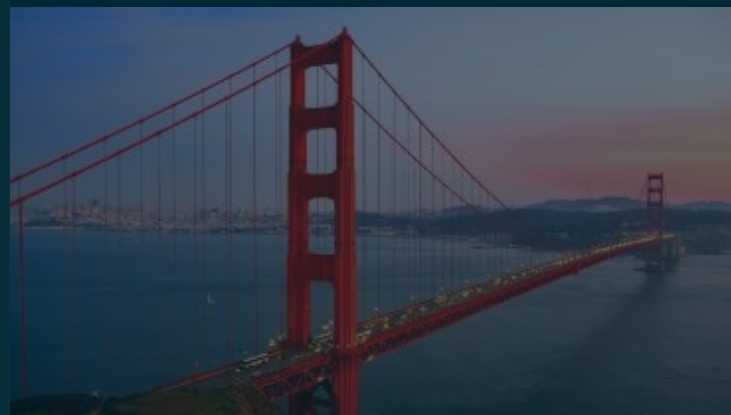
01

## UNLEASHED BRANDS



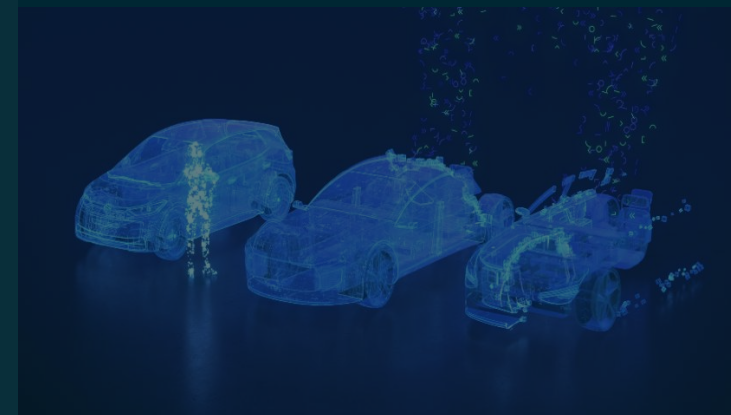
02

## REGIONAL LEADERSHIP



03

## TECHNOLOGY AT SCALE



# Design is a measurable value lever



**Comprehensive redesign**  
implemented group-wide

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Focus on **distinctive**  
**brand differentiation**

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**Holistic brand**  
**design** approach

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# Quality programs are effective and show valuable results

**Structured programs** rolled out across all brands

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**Measurable quality improvements** in **factory** and **field**

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Proactive processing and implementation of **customer feedback**

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From technology laggard to tech driver

# SMARTER, FASTER, LEANER.

Strong  
**partnerships**

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**Speed &  
execution** focus

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Tailored **local-for-  
local** strategies

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Scale for **cost  
competitiveness**

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# 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**

# Winning awards again

VOLKSWAGEN GROUP

SELECTED





# Strong product momentum continues...



**>20**  
new models  
in 2026

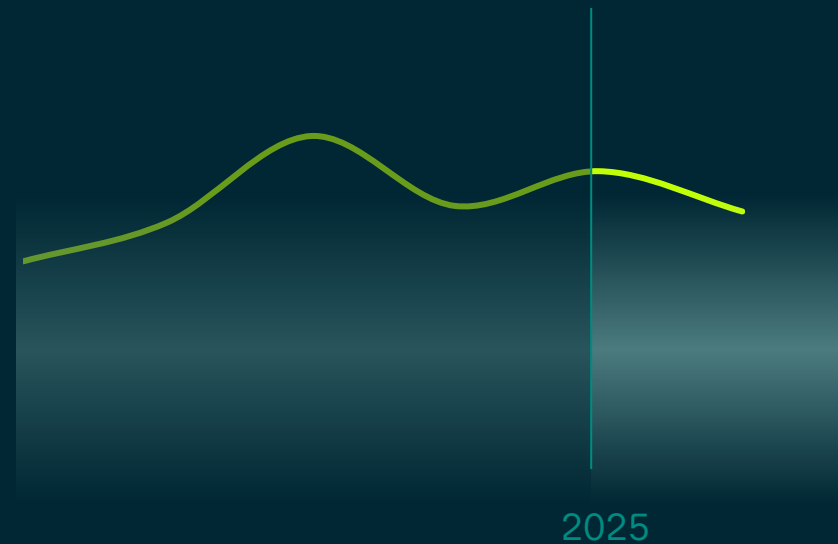


**30**  
new models  
in 2025



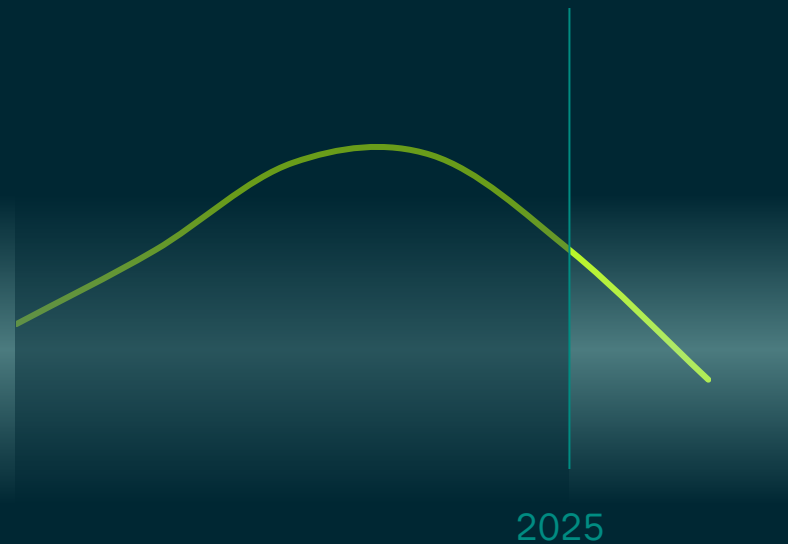
...and brings portfolio age back to well balanced levels

**Brand Group  
CORE**



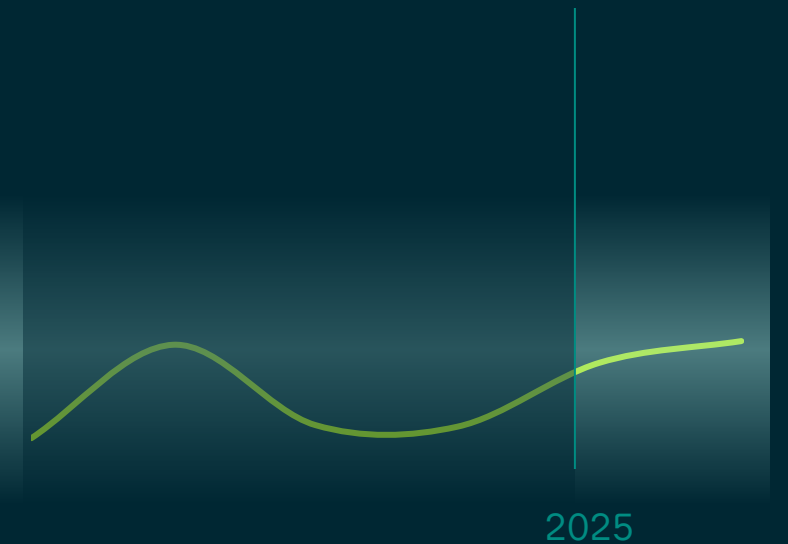
Fleet age lowered to **highly competitive levels across Brand Groups**

**Brand Group  
PROGRESSIVE**



**Renewed & attractive product line-up drives customer demand**

**Brand Group  
SPORT LUXURY**



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

5,808k

+1% y-o-y

**TOTAL**

622k

+44% y-o-y

11% global **BEV** share

# Today's focus: product and technology

01

## UNLEASHED BRANDS



02

## REGIONAL LEADERSHIP



03

## TECHNOLOGY AT SCALE



# Group Strategy - Balanced regional footprint



**WIN**  
North America

**STRENGTHEN**  
Europe

**STABILIZE**  
China

# Volkswagen strengthens market leading position in Europe

VOLKSWAGEN  
GROUP

Strengthened market  
position in **ICE segment**

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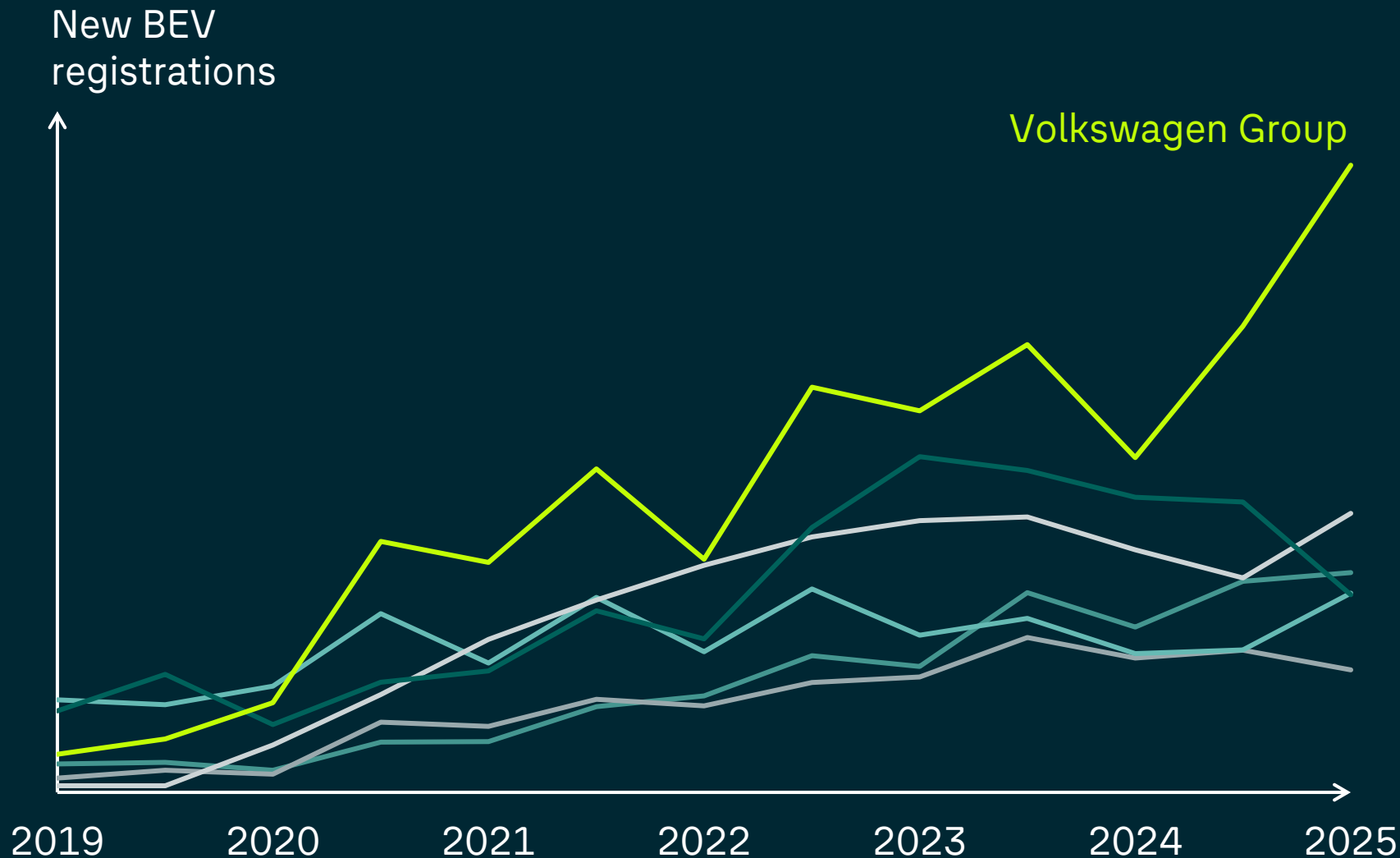
**Leading the market** with a  
share exceeding 20%

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A0/A00 segment as  
additional **opportunity**

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# Volkswagen Group leading in European BEV market



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



# Strong scale opportunity in European entry-level segments

Total Market (Passenger Cars) in Europe (27+4), 2024



**Growing gap** in entry level segment since 2019

VW complementing portfolio with **entry-level BEVs**

**Huge volume opportunity** for ID. Every1 and Urban BEV family<sup>1</sup>

1. Cupra Raval, Skoda Epiq, Volkswagen ID. Polo, Volkswagen ID. Cross

# Volkswagen sets course for growth in North America

VOLKSWAGEN  
GROUP

**Strengthen localization and independence** with local development & production

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**Entering electrified pick-up/SUV segment** with Scout

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**Strategic Tech Partnership** with Rivian ensures state-of-the-art technology

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# Execution of China strategy on track



**Local development** and **speed** to match customer taste

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Smart tech partnerships to push **tailored and superior NEV/ICV** product offering

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Localized supply chain and R&D to achieve **cost parity with local leaders**

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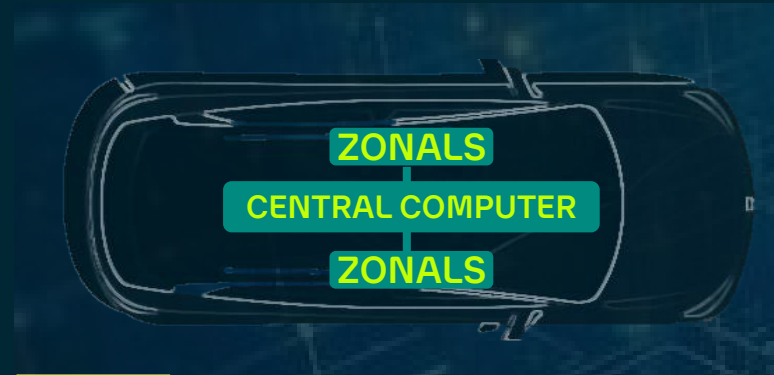
# 'In China, for China' Strategy - From Promise to Delivery

WE ARE  
**FAST**



**24 - 30** months  
time to market

WE ARE  
**SMART**



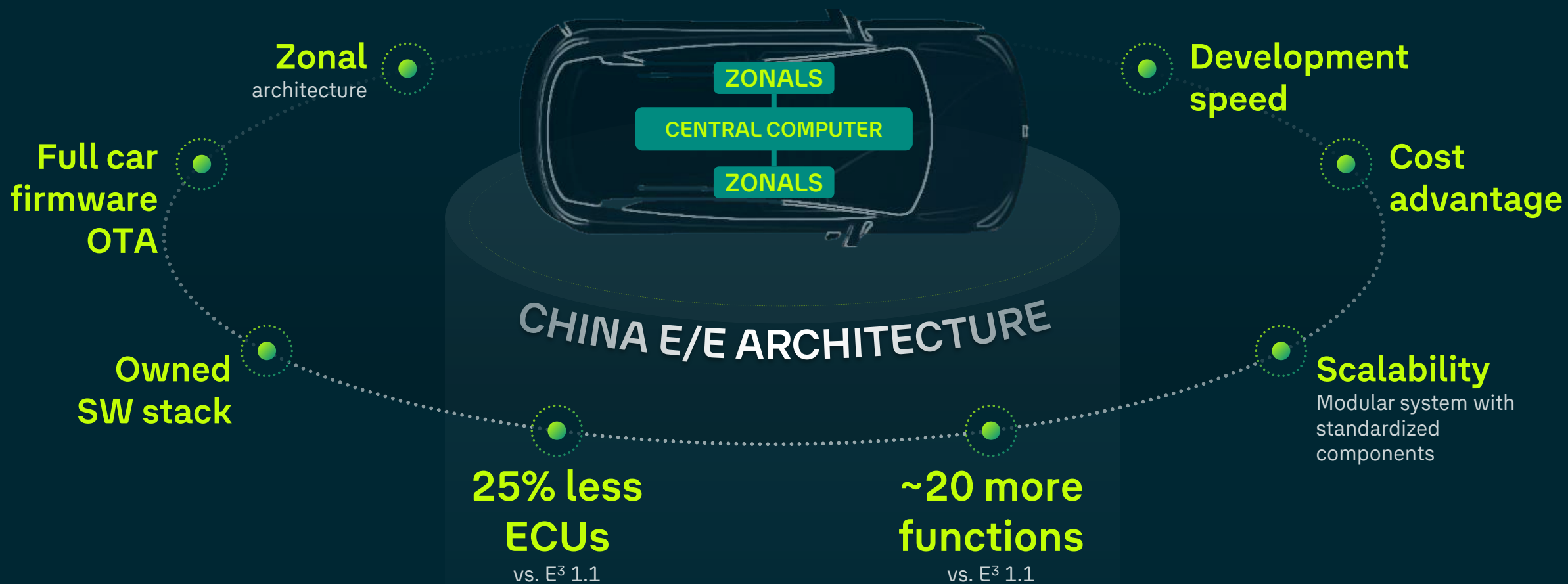
1<sup>st</sup> **locally developed** zonal  
architecture + **in-house  
developed** ADAS L2++

WE ARE  
**COST COMPETITIVE**



**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



**50** NEW MODELS UNTIL 2030

# China will remain key for Volkswagen Group



Target  
Picture  
2030

**#1 international OEM**  
& among **TOP 3**  
in Chinese market

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Top position in **ICE**;  
tailored, superior **ICV**  
**product** offerings

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Strategic ambition of  
**~€ 3.0bn** prop. operating  
profit<sup>1,2</sup> in 2030

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# Significant potential beyond core regions

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

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**Local production** combined with targeted **import strategies**

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Flexible strategies to address **diverse customer preferences**

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# Today's focus: product and technology

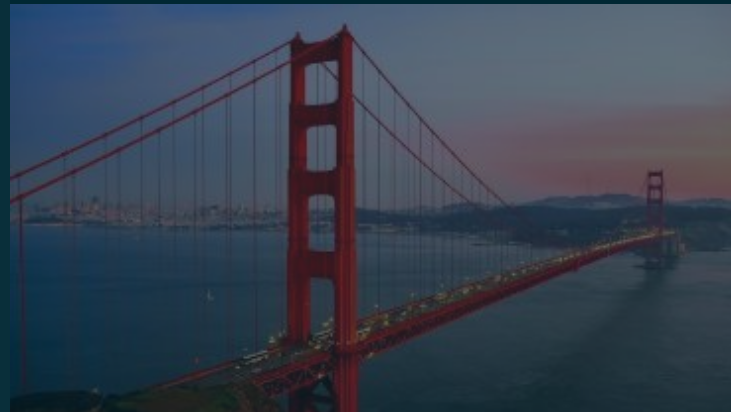
01

## UNLEASHED BRANDS



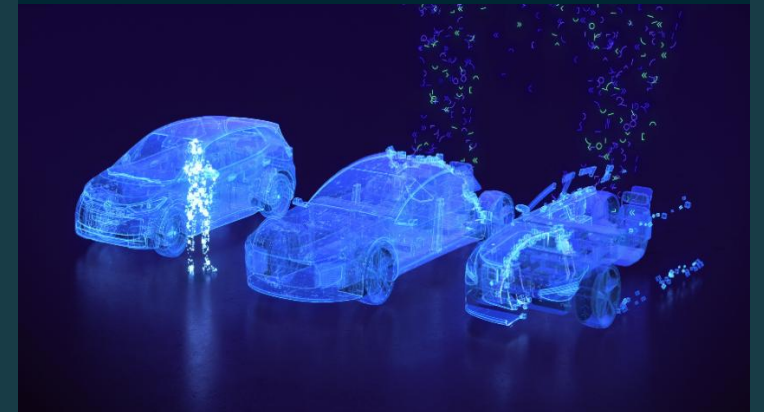
02

## REGIONAL LEADERSHIP



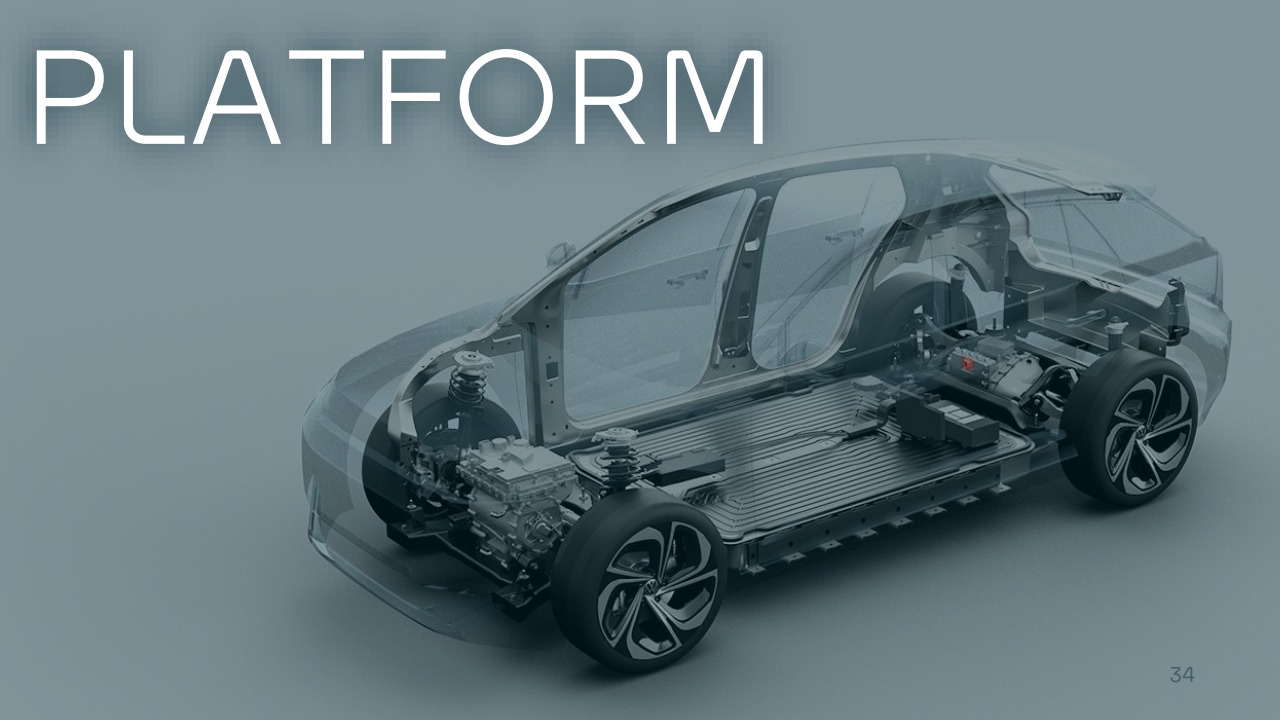
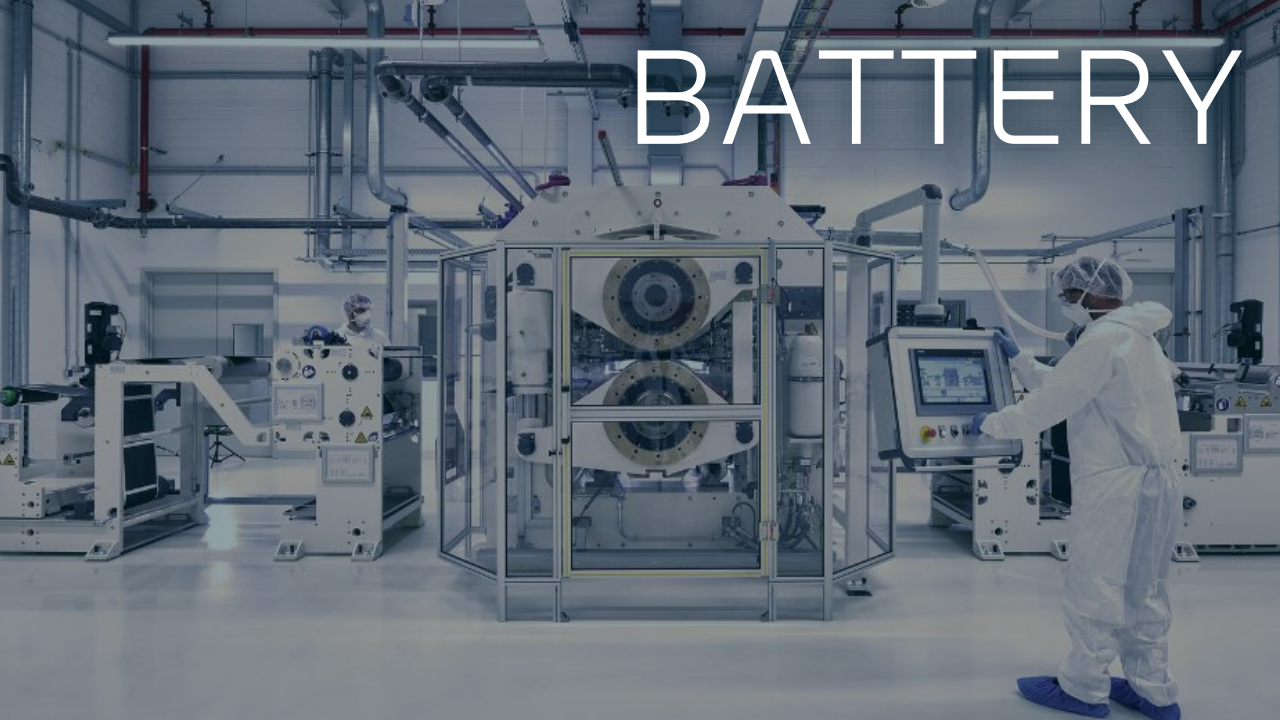
03

## TECHNOLOGY AT SCALE





# SOFTWARE MOBILITY



# BATTERY PLATFORM

# New electrical architectures enable cutting-edge software solutions

RIVIAN | VOLKSWAGEN GROUP  
TECHNOLOGIES

CARIAD  
A VOLKSWAGEN GROUP COMPANY

 XPENG

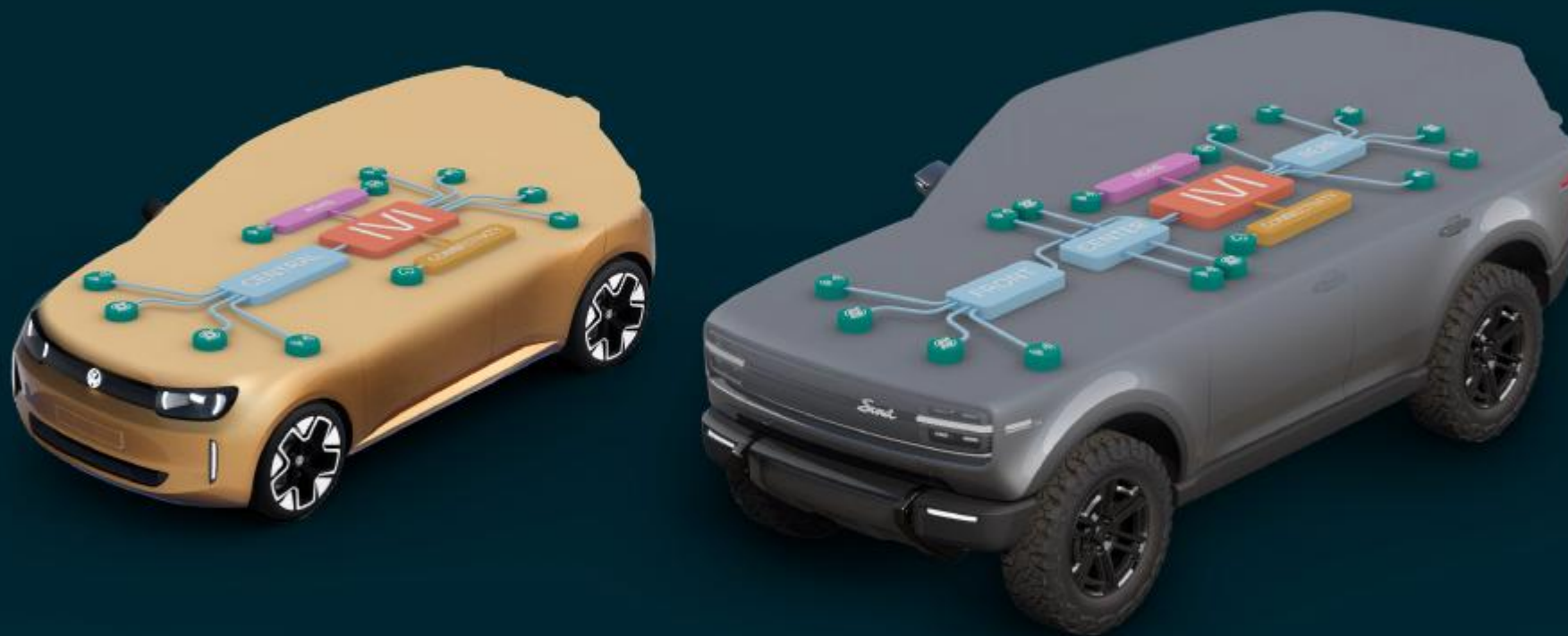
Creating **cutting-edge software** and **electronics architectures**

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

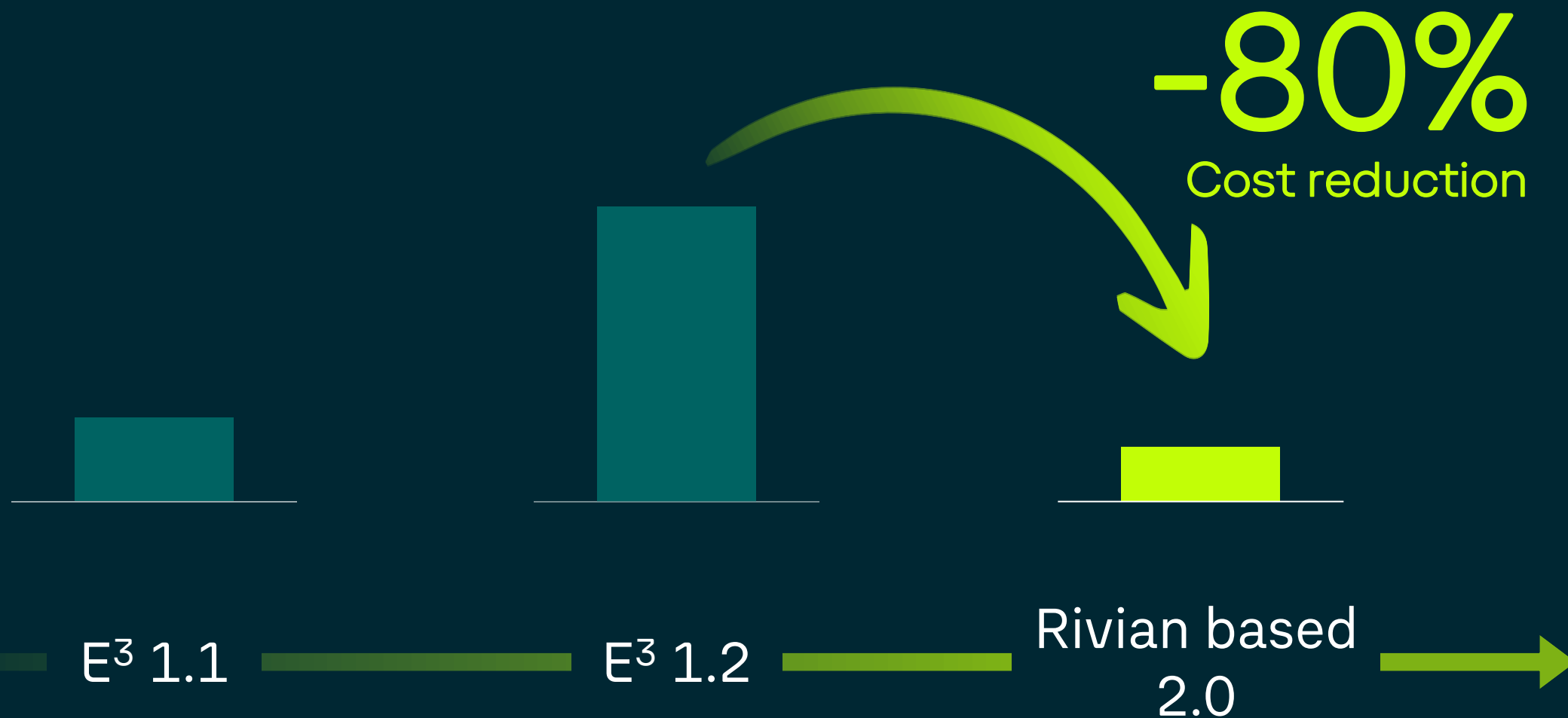
**Platform & software** partnership with Xpeng: joint development of CEA<sup>1</sup>

1. China Electrical Architecture (CEA), a zonal Electrical/Electronic (E/E) architecture.

# 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

# PowerCo

## TECHNOLOGY

Unified Cell Concept (UFC)

Global technology platform

## FLEXIBILITY

Diverse chemistry roadmap

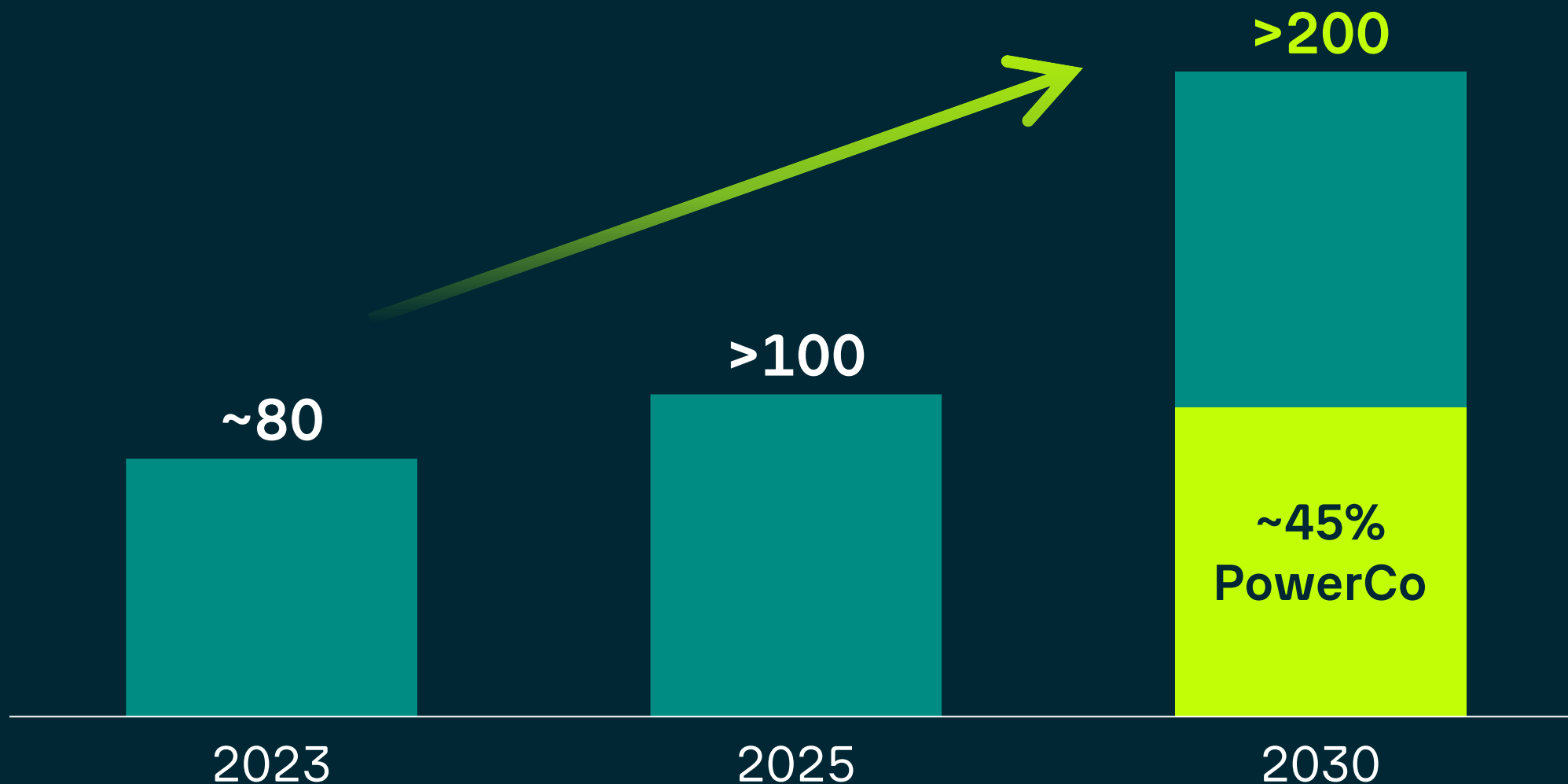
From entry segment with LFP/  
sodium to high end like solid state

## SCALE + COST COVERING

Low complexity for scaling

Possible coverage of 80%  
product portfolio

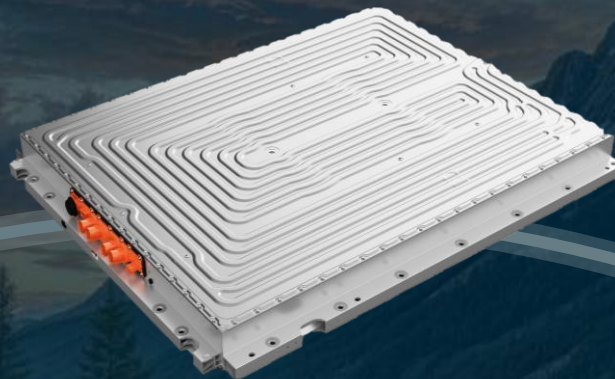
# Volkswagen Group's demand of unified cells adapted to new market conditions





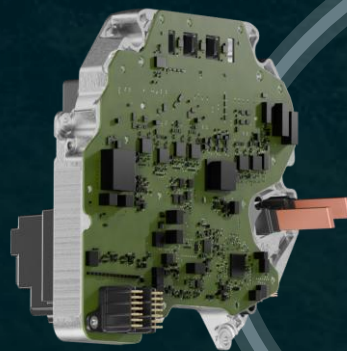
Closed-Loop-Approach: Boosting drivetrain efficiency  
through in-house system design

**BATTERY**

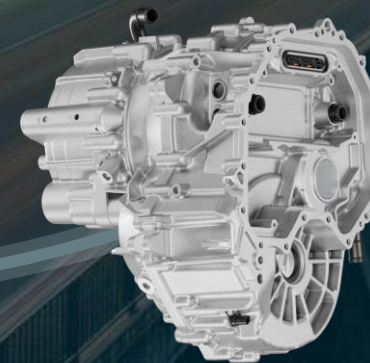


**THE GLOBAL AUTOMOTIVE  
TECH DRIVER**

**INVERTER**



**E-DRIVE**



# Converging platforms and E/E architecture key



**One platform** - Maximum efficiency and scale

Basis for **~30 million vehicles<sup>1</sup>** across all Brand Groups

Strong scale effects leading to **lower production costs**

1. Cumulative SOPs from 2027 to 2032.

# Key Facts SSP



**A- to C/D-  
Segments**

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Total 30mn  
vehicles



**6 Brands**

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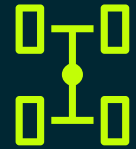
Covering all  
brand Groups



**33 Hats**

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SOPs  
2027 to 2032

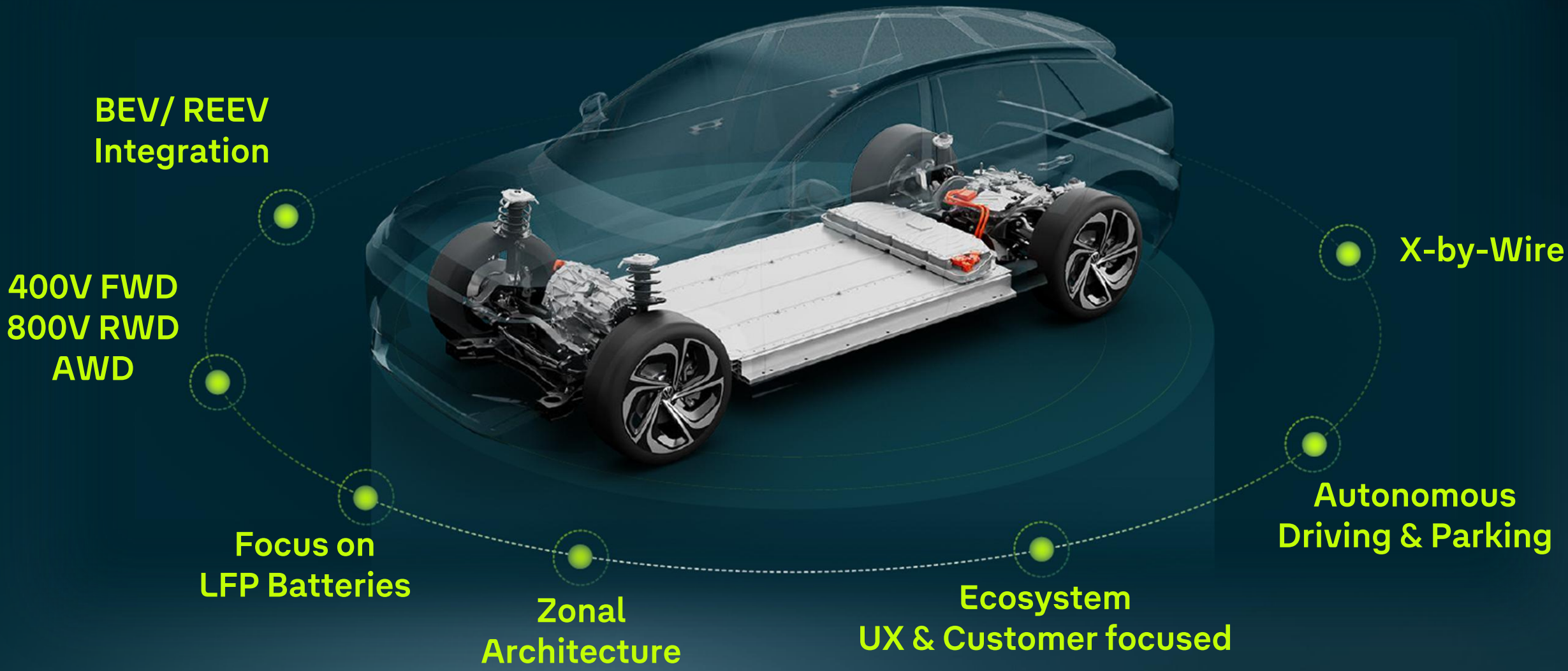


**5 Main  
Platforms**

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Regions  
EU/NAR;  
China: CSP/ CEA

# Technical Specifications SSP



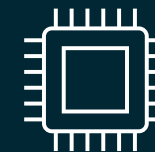
# Success factors SSP



**Competitive  
& attractive  
products**



**Significant  
cost  
advantages**



**Digital competitive-  
ness & 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

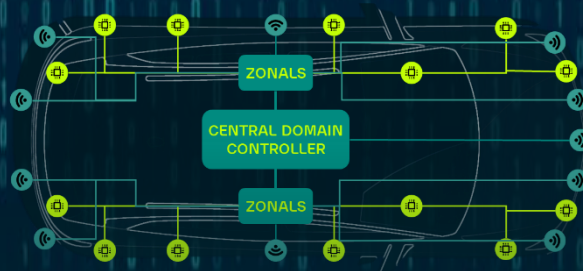
**Scale technology** utilizing size to unlock operational and financial leverage

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

## PLATFORM COOPERATION

## E/E ARCHITECTURE PARTNERSHIP

## CHARGING NETWORK



**Two full-sized BEVs**  
1<sup>st</sup> 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

CARIAD  
A VOLKSWAGEN GROUP COMPANY



Horizon  
Robotics

60%

40%

CARIZON

# CARIZON



**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



## JV's Tech Scope

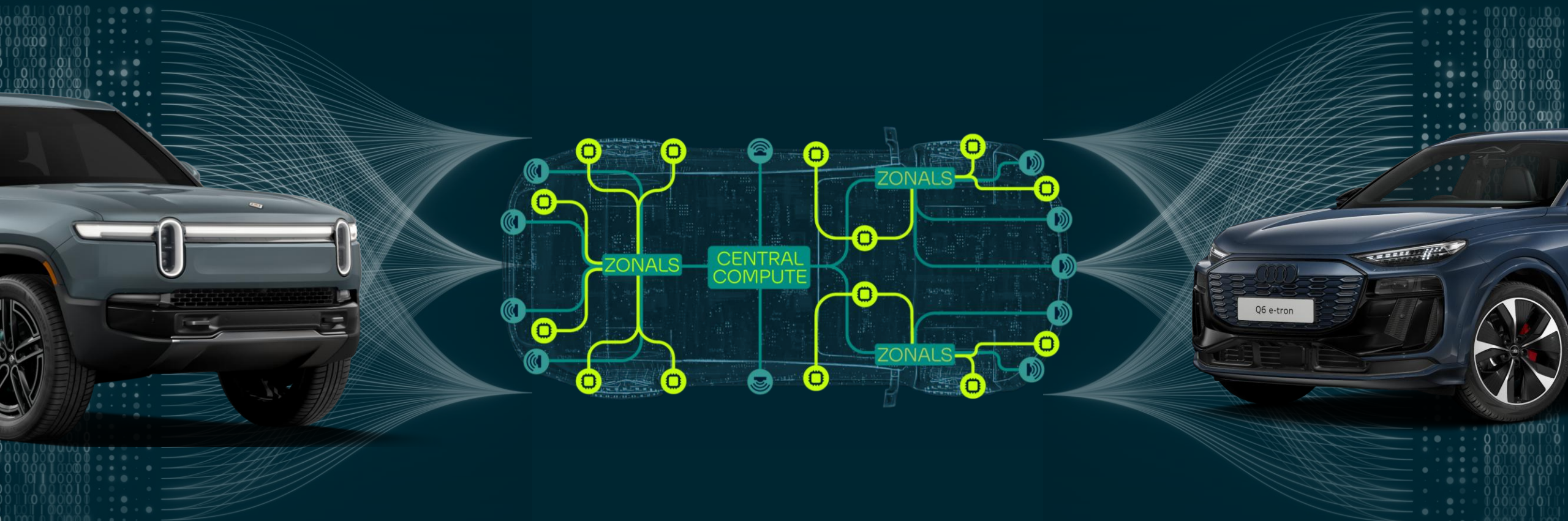
-  Software Platform Development
-  Connectivity
-  App & HMI Development
-  CARIAD fully owning IP

**Combination of competencies** from CARIAD and ThunderSoft

Further step to **speed up our digital transformation** in China

**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-the-air update** and **diagnostic capabilities**

# MOIA provides a turnkey solution for fully autonomous mobility services



A complete system:  
**safe, scalable,  
turnkey**

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Equipped with **27 sensors**  
generating **comprehensive  
360° view** of surroundings

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**Strategic partnership  
with Uber** to deploy  
autonomous ID. Buzz

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# Key takeaways



## 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



**WIN**  
North America

**STRENGTHEN**  
Europe

**STABILIZE**  
China



# Group Strategy - creating balanced regional footprint

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

North America

12%

Europe

42%

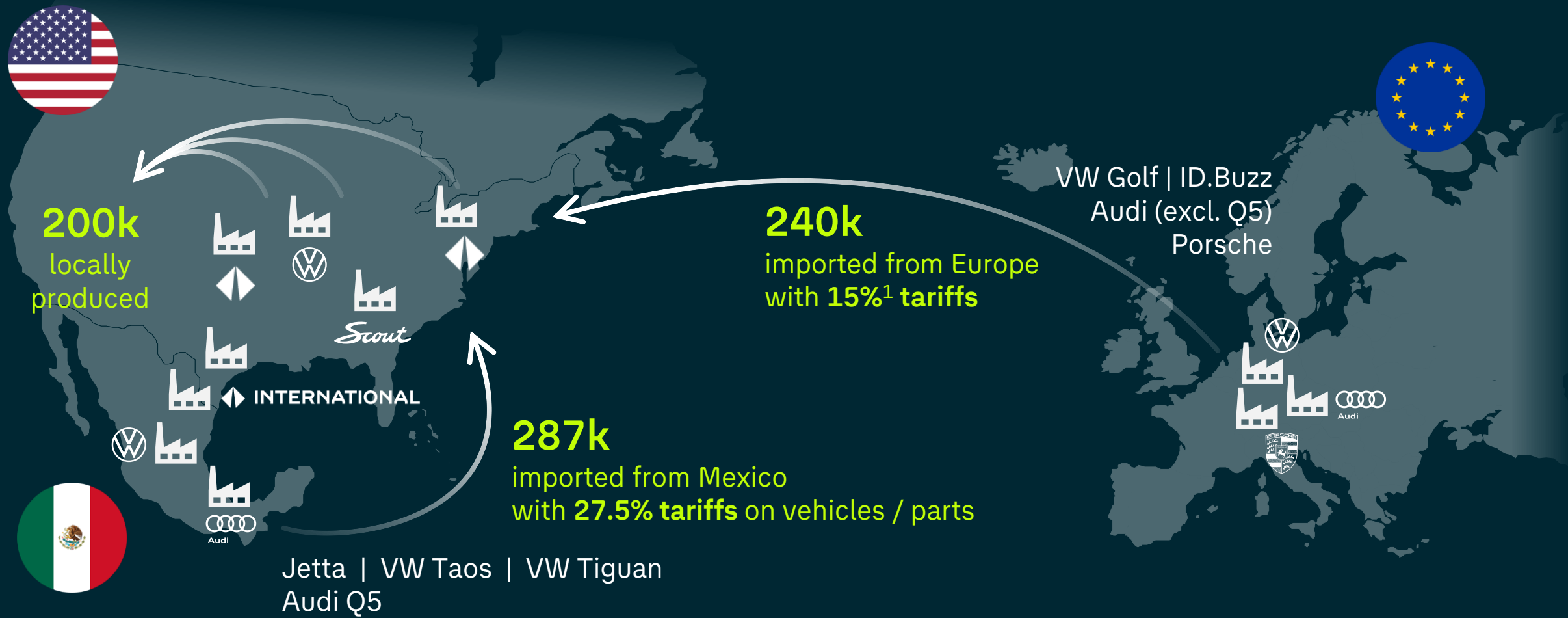
China

32%

South America

7%

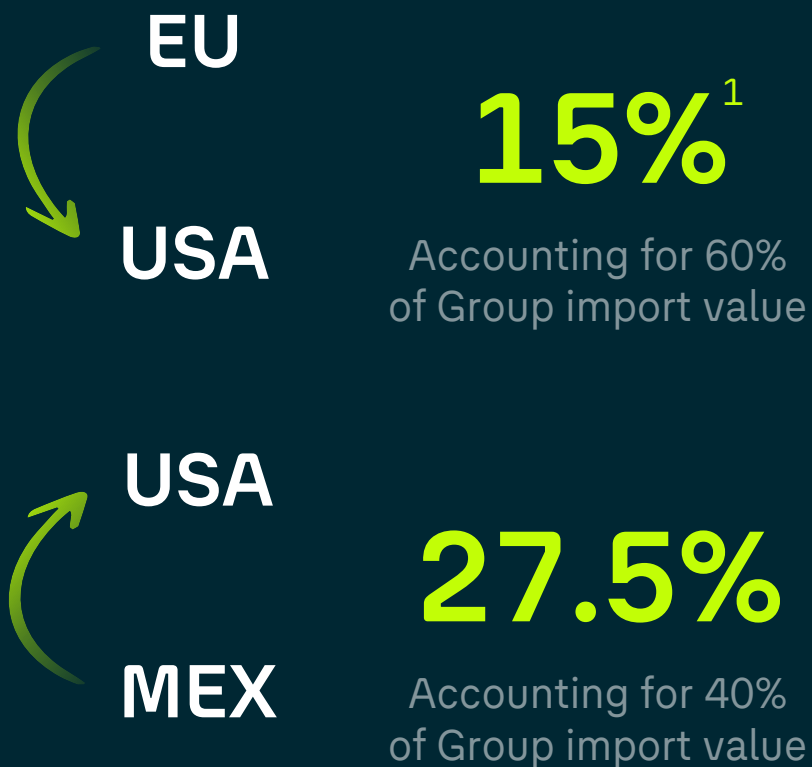
# North American production footprint and vehicle flows of Volkswagen Group in 2024



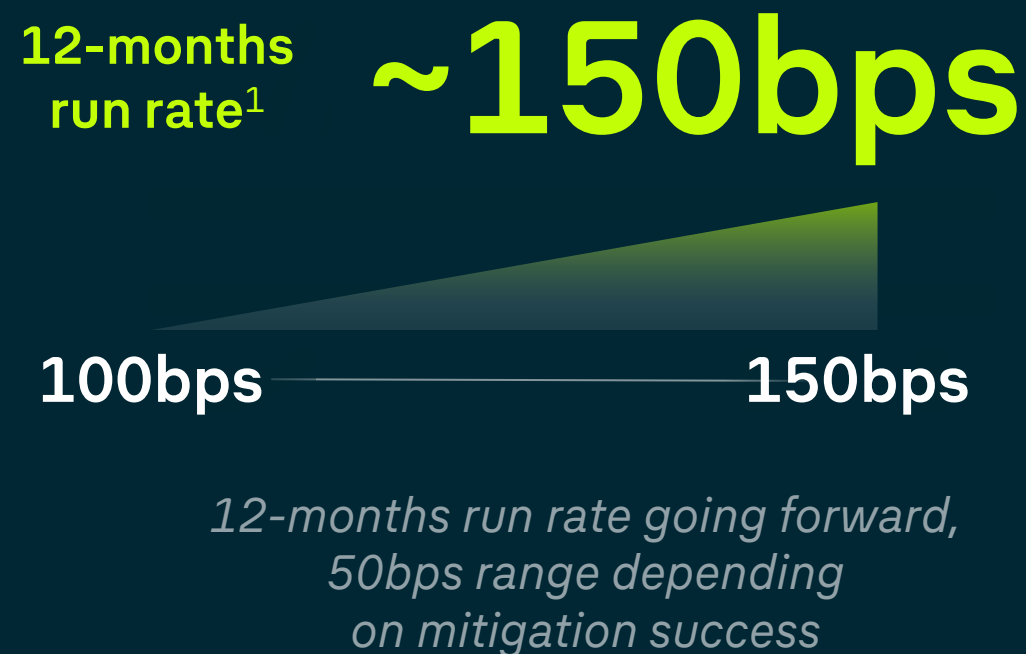
1. Current 27.5% US import tariff expected to be reduced to 15% retroactively from 1 August 2025, implementation of reduced tariff pending.

# Increased US tariffs with significant effect on earnings

## Underlying tariff regime



## Return on Sales impact



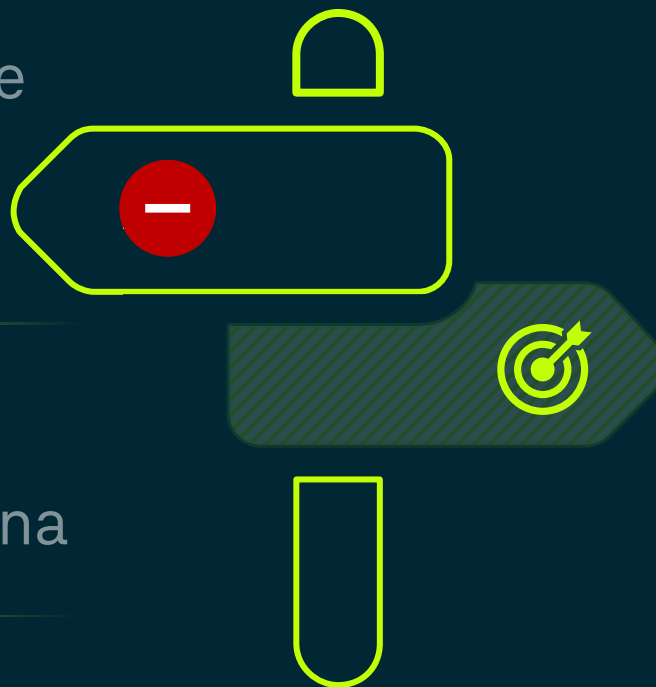
1. Current 27.5% US import tariff expected to be reduced to 15% retroactively from 1 August 2025, implementation of reduced tariff pending.

# Volkswagen Group in USA at a crossroads

Concentrate on Europe  
in terms of vehicle  
specification

R&D/CAPEX  
focus on Europe & China

Rethink localization



Broaden **portfolio**



Developing **US concepts**



**Quality** focus (J.D. Power)

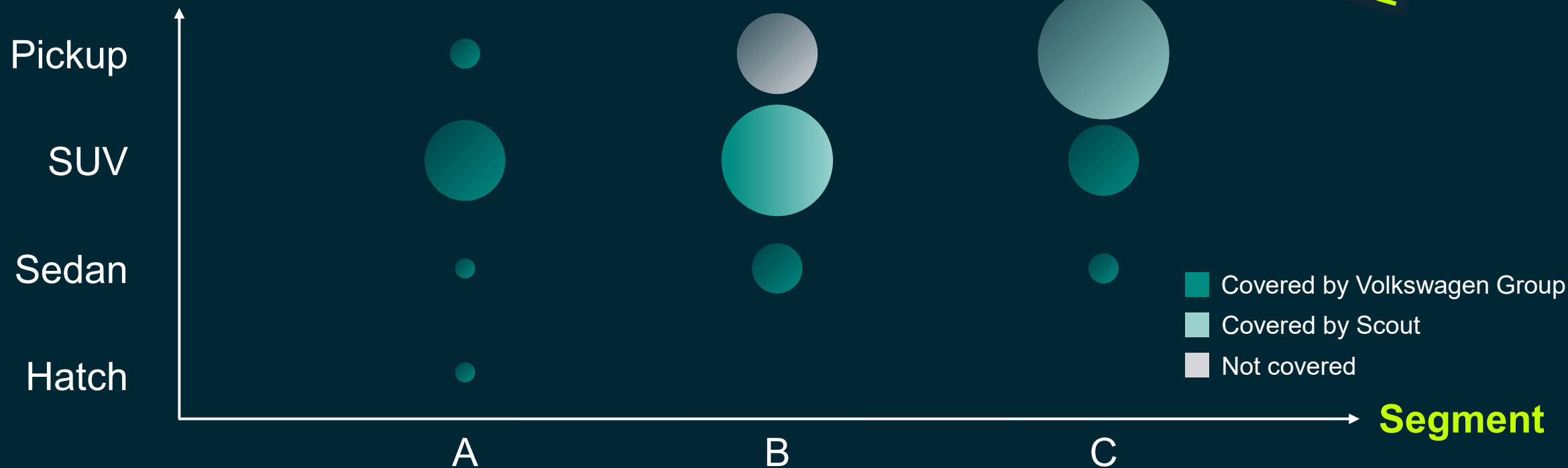


Further **localization:**  
Scout decided, Volkswagen  
and Audi under review

# Scout to complement current product portfolio

## Bodystyle

Expected US market profit pools in 2030



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



Entrance via highly attractive segments from 2028 on:  
**Pick-ups & rugged SUVs**

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**Heritage brand meeting customers' desires** to strengthen NAR position

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High adaptability of BEV offering with **gasoline range extender offers**

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# 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

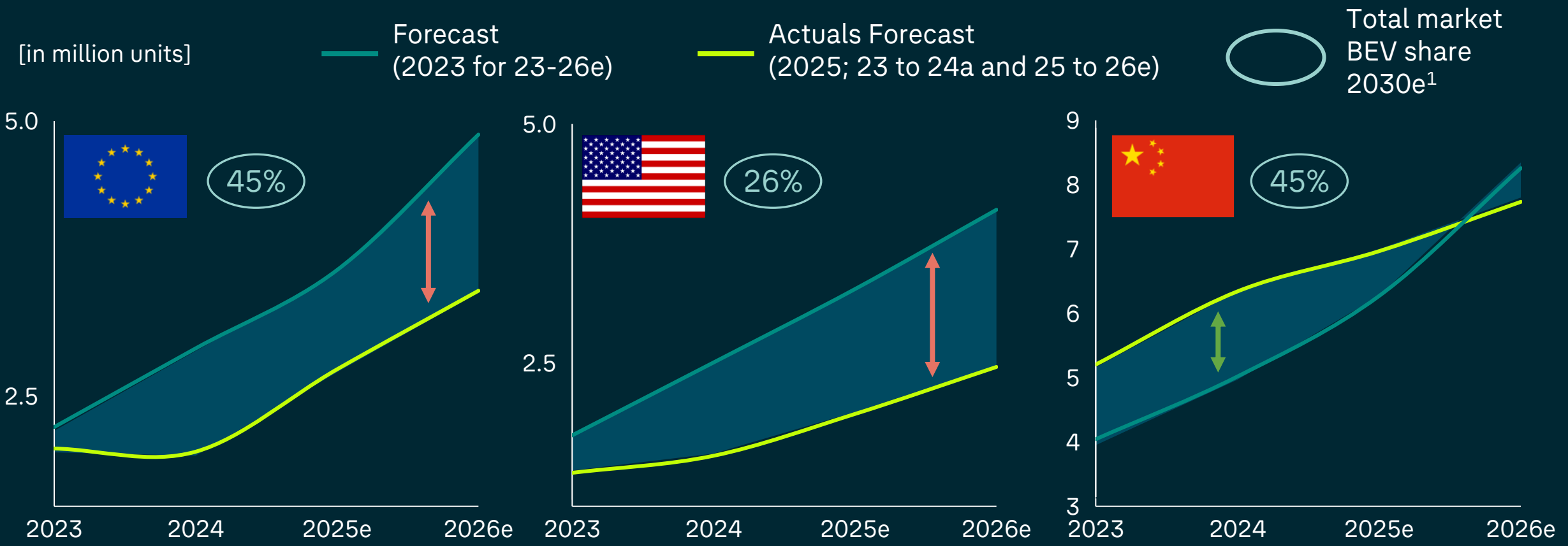
Focused approach  
to **equity  
investments**



Aligned  
management  
incentivization



# Significantly slower BEV adoption in core regions



**EU/NAR lags expectations** by cumulated ~8 million<sup>2</sup> BEVs

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

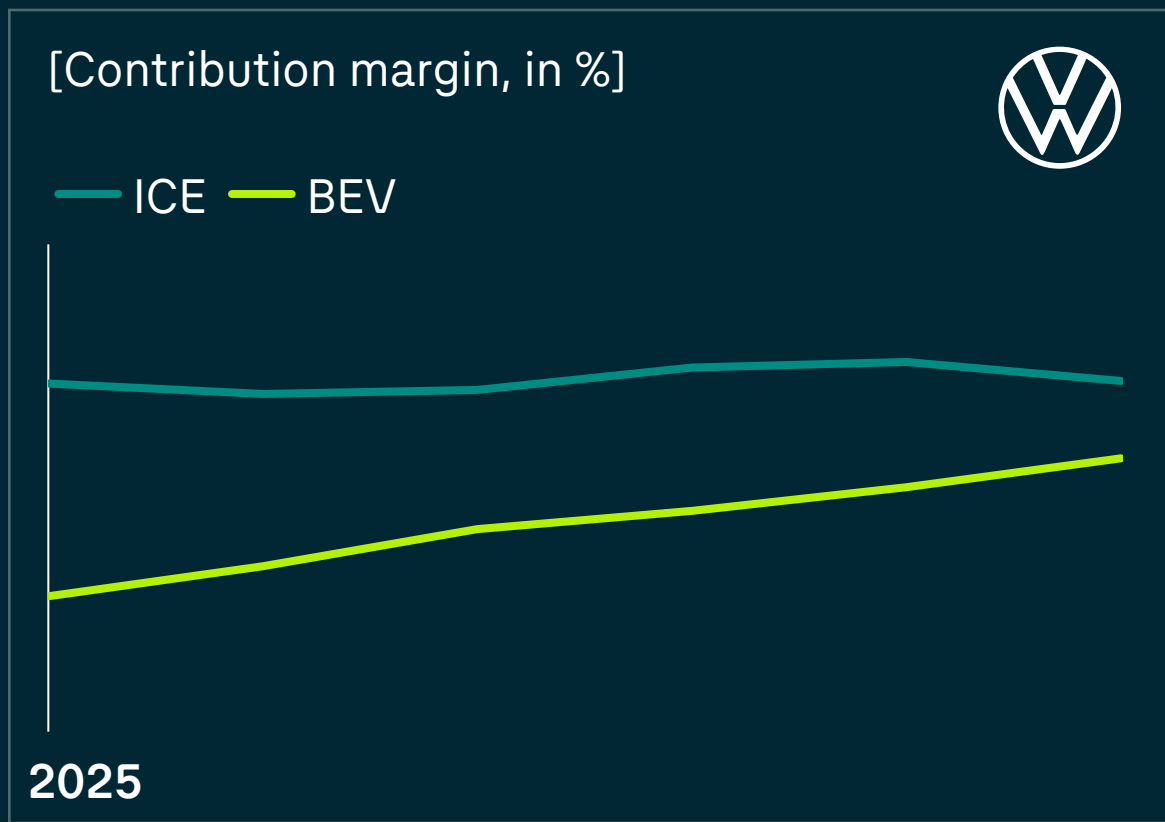
**Slower BEV ramp-up** resulted in **scale inefficiencies**

1. Source: selected broker reports | 2. In the period from 2023 to 2026e

# 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**



# Complementing portfolio in all European market segments



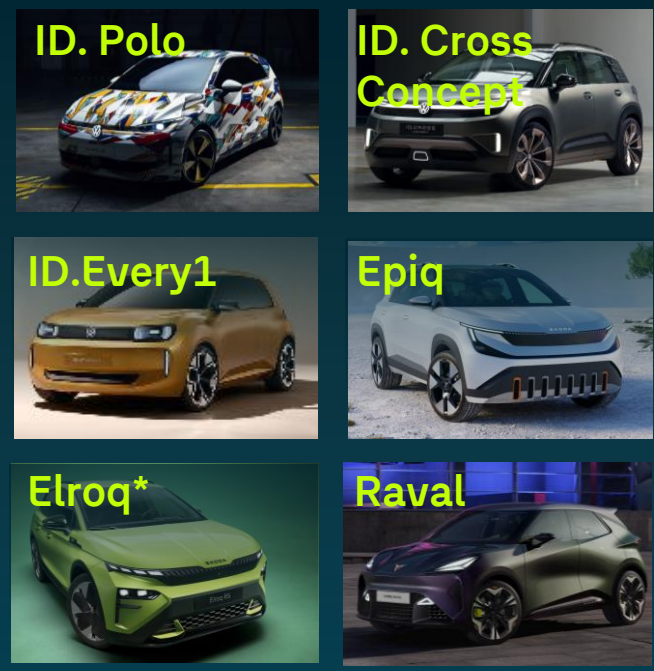
## 1. Wave Middle of the market



## 2. Wave Fleet and high-end



## 3. Wave Entry-level



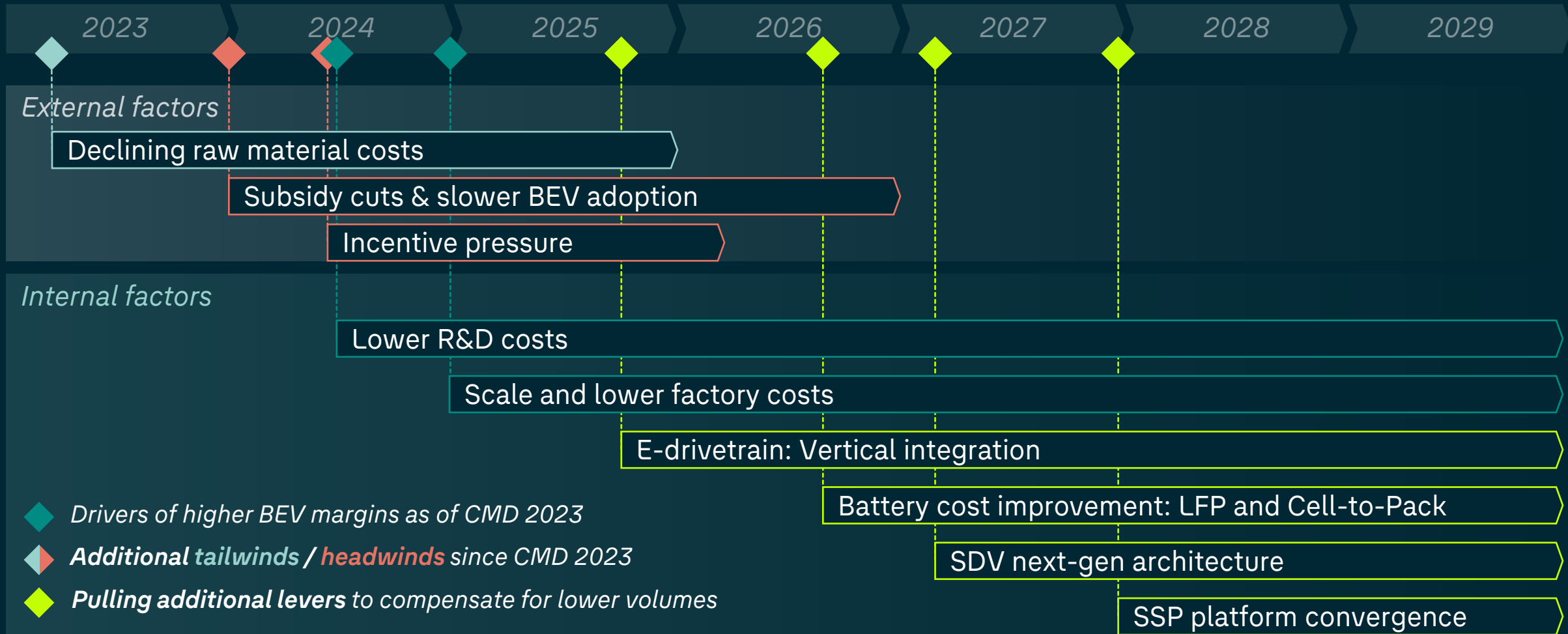
2020 ...

2024 ...

2026 ...

\*already launched in 2025.

# Levers towards BEV margin parity



- ◆ Drivers of higher BEV margins as of CMD 2023
- ◆ Additional tailwinds / headwinds since CMD 2023
- ◆ Pulling additional levers to compensate for lower volumes

# 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

The image consists of four vertical panels, each representing a different cost program. The first panel shows two white flags with the Volkswagen logo and 'VOLKSWAGEN AKTIENGESELLSCHAFT' text. The second panel shows an Audi logo above a green Audi sedan. The third panel shows a hand holding a gold Ferrari shield above a row of gold coins. The fourth panel shows a blue wireframe car model above the word 'CARIAD'.

Future  
**Volkswagen**

**Audi** agreement  
for the future

**Porsche** strategic  
Realignment

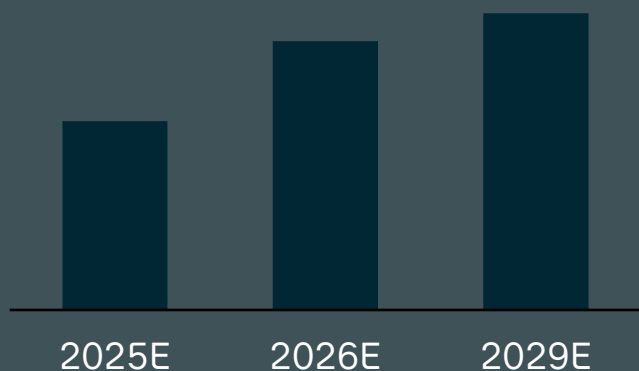
**Cariad**  
streamlining

# "Future Volkswagen" agreement addressing three core areas

## Tariff agreement

Net cost effects  
[in € bn]

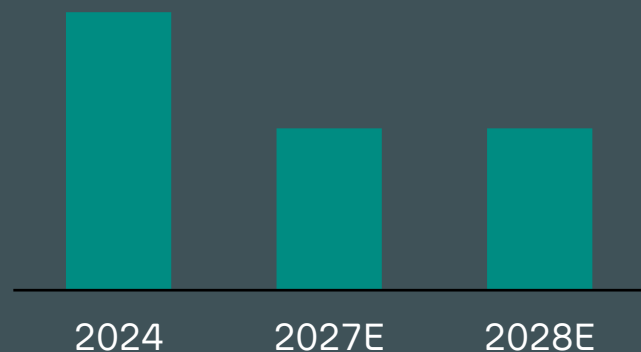
**€ 1.5bn  
cost savings**



## Technical capacity

Installed technical capacity VW AG in Germany<sup>1</sup>  
[in mn units]

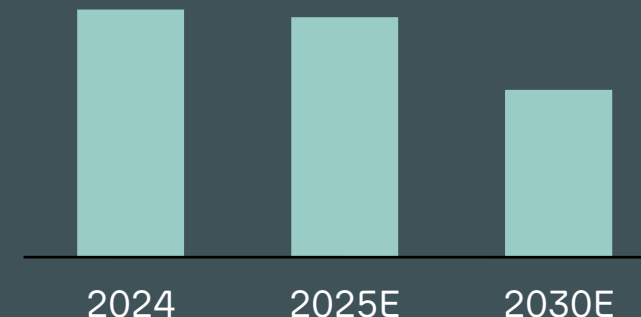
**Reduction by  
~730k units**



## Workforce

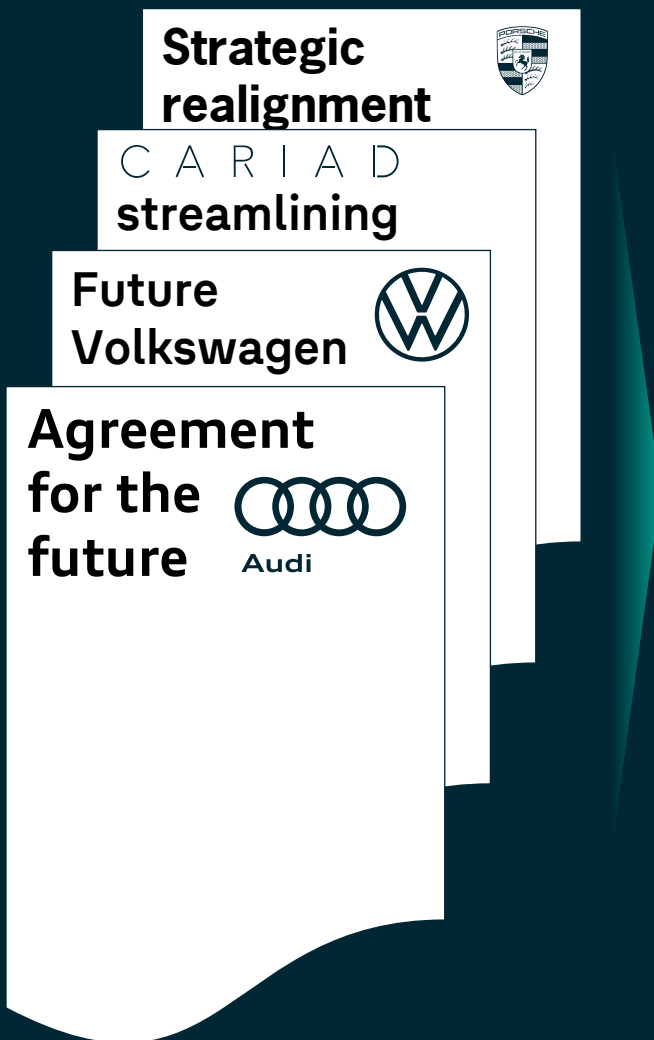
Number of German Volkswagen employees<sup>1</sup>  
[active<sup>2</sup> workforce in '000]

**Reduction by  
>35,000 employees**



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

>1mn<sup>1</sup>

units by YE2027

Rightsizing European capacity to optimize utilization, factory productivity & cost

Re-alignment of workforce

~50k

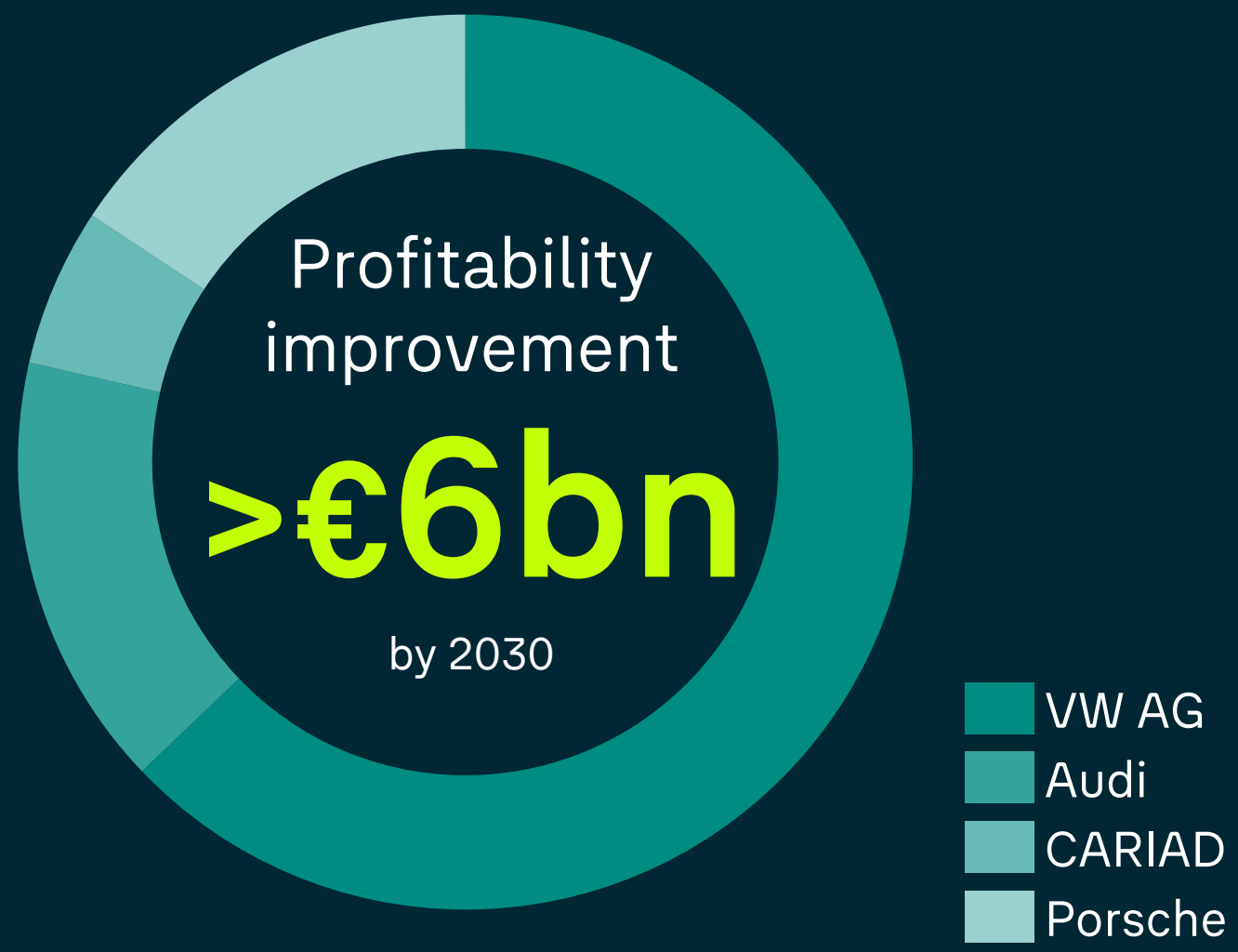
headcount reduction by 2030<sup>2</sup>

Realignment of workforce at German locations in a socially responsible manner

1. Including Audi Brussels | 2. Compared to year-end 2024.



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

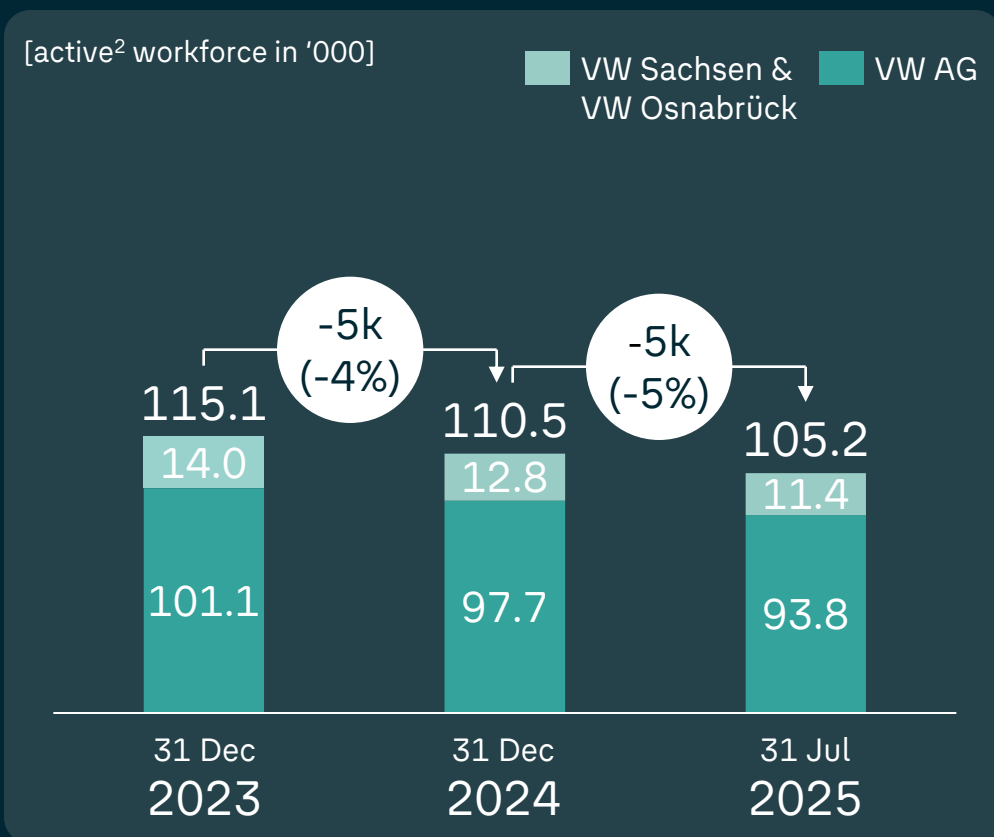


Implied Group RoS effect  
**>150bps**  
by 2030

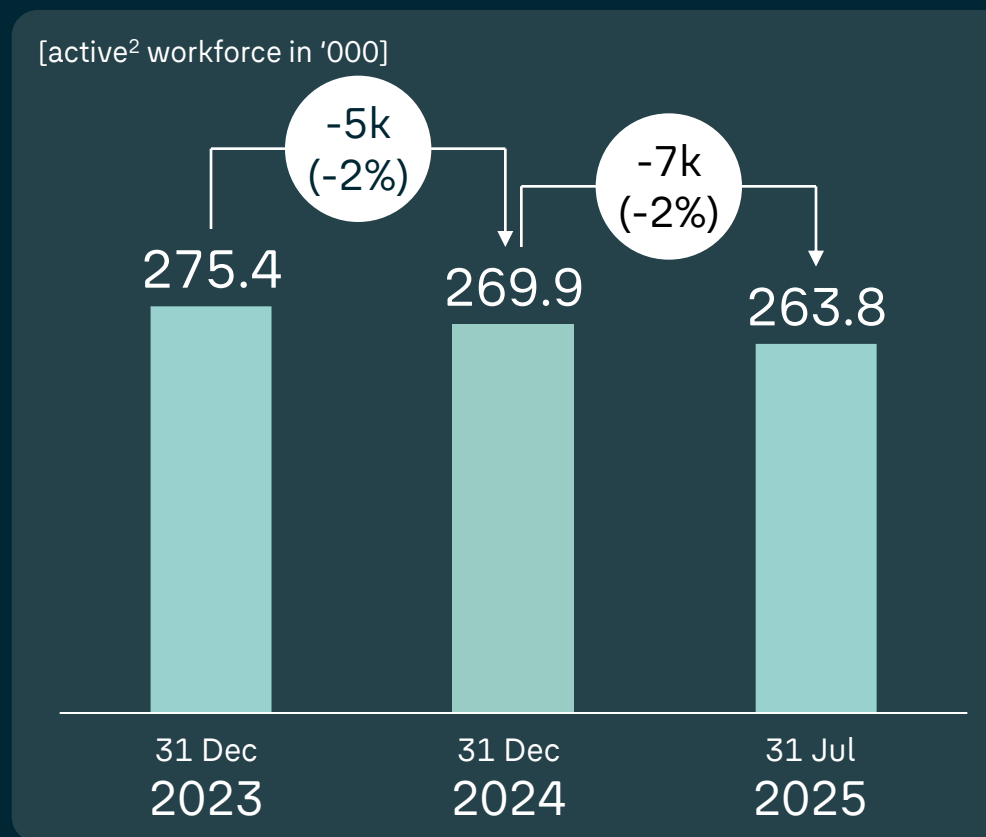
# ... and we are delivering

German headcount development, 2023 to July 2025

## Volkswagen AG<sup>1</sup> (Germany)

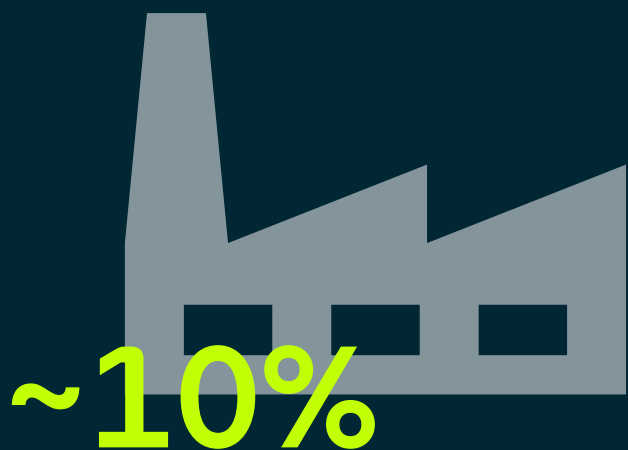


## Volkswagen Group (Germany)

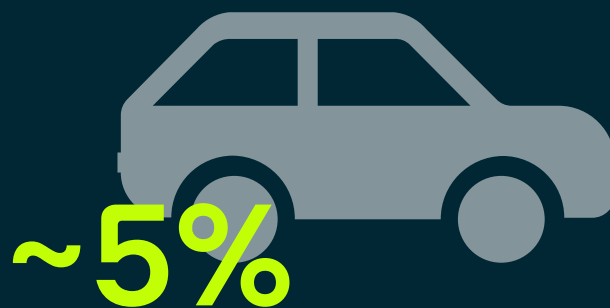


1. Scope: Volkswagen AG, Volkswagen Sachsen GmbH, VW Osnabrück GmbH | 2. Active Workforce (excluding employees in the passive phase of partial retirement and apprentices)

# Factory cost strongly improved with further potential



Reduction of factory cost per vehicle<sup>1</sup> until end 2025



Further cost potential per vehicle<sup>1</sup> 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

# 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

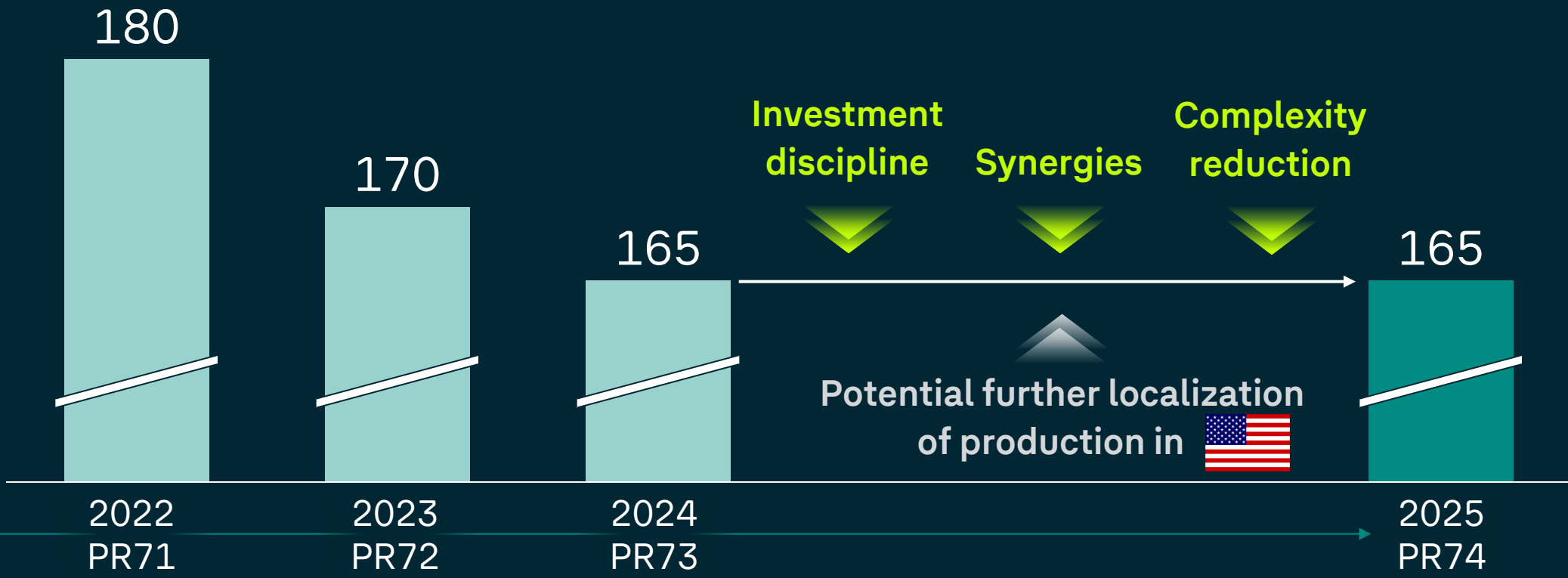
**>€ 600mn** *Combined savings over product lifetime*

SELECTED EXAMPLES



# €165 billion mid-term invest plan committed

5-year combined capex and R&D plan [€ bn]



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



> 250

Non-controlled  
shareholdings  
on Group level

Opening capital structure  
of **ADMT & PowerCo**

Increase of free float  
**TRATON** shares

Evaluating options  
for **Everllence**

Active management  
of **NCS<sup>1</sup>** continuing

1. Non-controlled shareholdings

# Progress along 2023 Group CMD action fields



# Changes of assumptions & input factors for upcoming planning round compared to CMD 2023<sup>1</sup>

## 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**

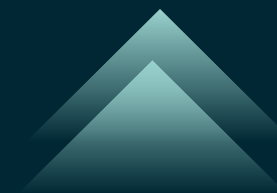
## Tailwinds

**Implementation of extensive Group-wide cost programs**

**CO<sub>2</sub> / 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

1. PR74 expected to be completed by year-end 2025; compared to PR72 in 2023.



# 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 2<sup>nd</sup> part



**Thomas Schaefer**

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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



Commercial  
Vehicles



SKODA



SEAT



CUPRA

We are the CORE of the VW Group

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

VISION  
SIX

# Unlocking value through brand diversity



People's  
Brand

Progressive modern  
mainstream



SKODA

Let's  
Explore

VISION 75

Functionality  
seeking



CUPRA

Unconventional  
Challenger

Image  
seeking



SEAT

Fun &  
Accessible

Cross-attitudinal  
youngster



Commercial  
Vehicles

Space for Needs  
& Dreams

People on  
a mission

# Strong sales footprint in all world regions

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

Revamp  
North America

**16%**  
AMERICA (+4.3%)

Strong position & further  
growth in South America

Defend  
Europe

**46%**  
EUROPE (+4.2%)

In China  
for China

**30%**  
CHINA (+1.1%)

**8%**

Rest of World  
(+13.0%)

Strengthen market penetration  
in Rest of World

# Quality that matters – For our customers



Commercial Vehicles



SKODA



CUPRA



**GOLF**

Goldenes Lenkrad



**ID. Buzz**

J.D. Power APEAL Award



**Octavia Combi RS**

Goldenes Lenkrad



reddot

**TAVASCAN**

Red Dot Winner



**ID.7**

German Car of the Year



**Amarok**

Pick-up of the Year



**Best In Class Award**

Die Elektroautos des Jahres (DE)

**TERRAMAR**

Shortlisted for the Car of the Year 2025 award



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

≤A0

A

≥B

ICE / xHEV



 Polo mHEV  T-Cross mHEV  Taigo	 Kamīq mHEV  Fabia	 Arona mHEV  Ibiza	 Tiguan PHEV  Tayron PHEV  T-Roc HEV  Golf Fam. HEV  Caddy PHEV	 Kodiaq PHEV  Octavia Fam. HEV  Karoq HEV  Scala PHEV	 Terramar PHEV  Formentor PHEV  CU Leon Fam. PHEV	 Leon Fam. PHEV	 Passat PHEV	 Superb Fam. PHEV	 Crafter  Amarok  B Transporter Fam. PHEV
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BEV



 ID. Every1*  ID. Polo*  ID. Cross*	 Epiq*	 Raval*	 ID.4  ID.3	 Enyaq+Coupe  Elroq	 Tavascan  Born	 ID.7 Fam.	 Space BEV	 ID. Buzz  Transporter
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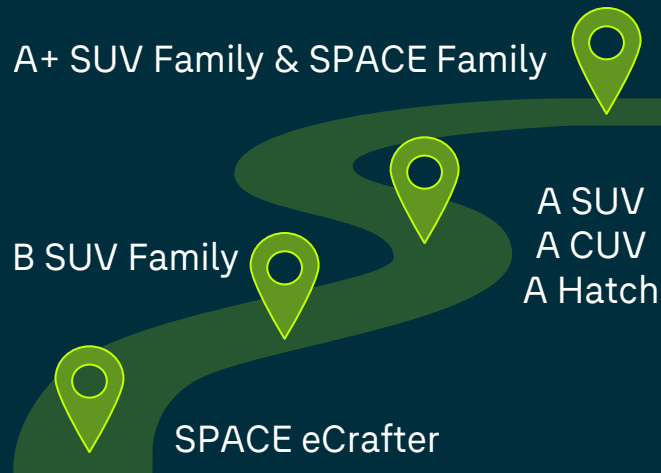
\* Pictures shown are concept cars/ near production vehicles



# With a clear portfolio strategy moving forward 2035

1

**Consistent BEV transformation:**  
**24 new BEV-models**



2

**Increase portfolio efficiency:**  
**130k<sup>1</sup> units per hat**

Number of Hats



Units per Hat



3



**Enormous scale effects by global synergetic clustering**

**SSP synergy cluster**

A0

A Hatch / Estate

A SUV / CUV

A+ SUV

B SUV

SPACE (LCV)

<sup>1</sup>Brand Group Core Passenger Car models only



OUR DNA

HUMAN TOUCH "EYES"

ID. EVERY1

SMILE!



BEYOND  
REBEL

0026 NRA

RAV4



VISION 79

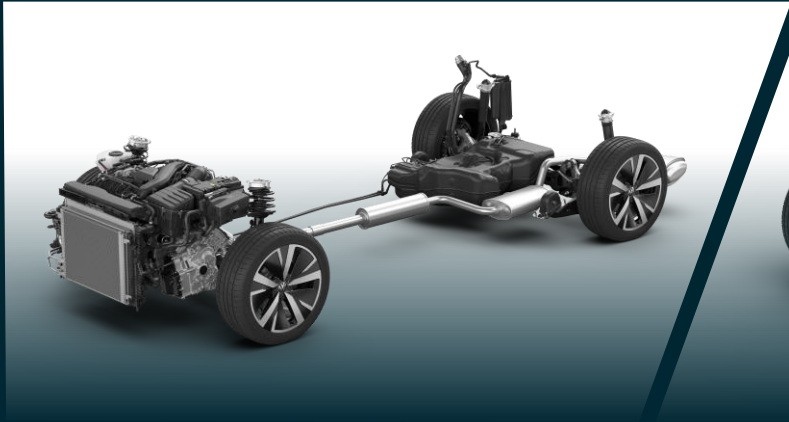


VOLKSWAGEN NUTZFAHRZEUGE DESIGN

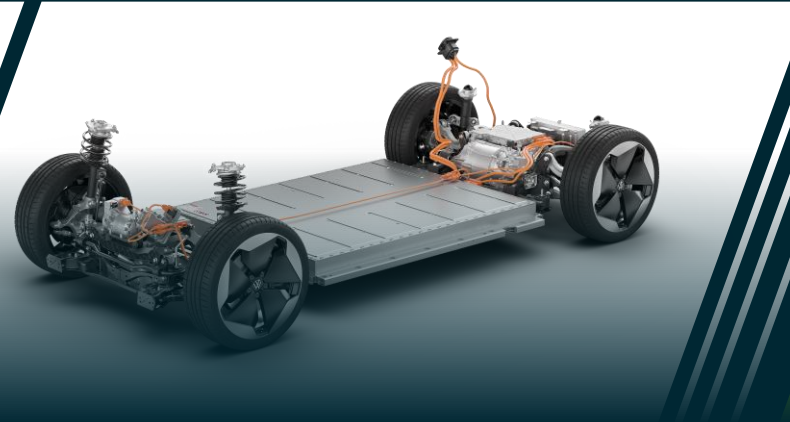
# Smart **platforms strategy** gains flexibility and **optimal allocation** across Brand Group Core

strengthening of today's platforms

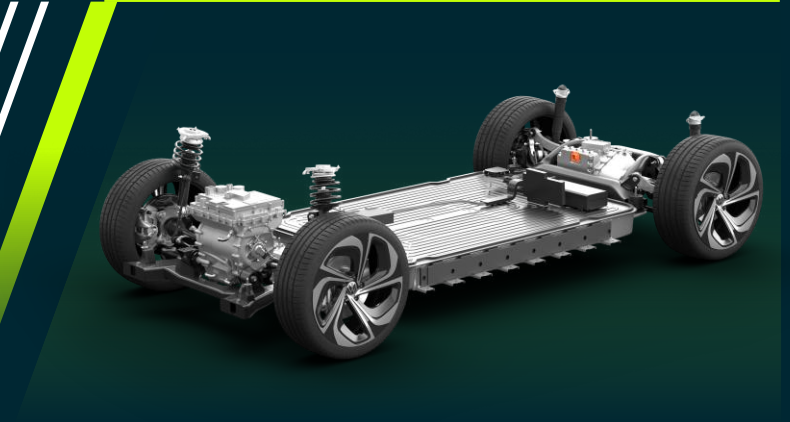
**winning with future platform**



MQB for ICE & xHEV



MEB+ for EV



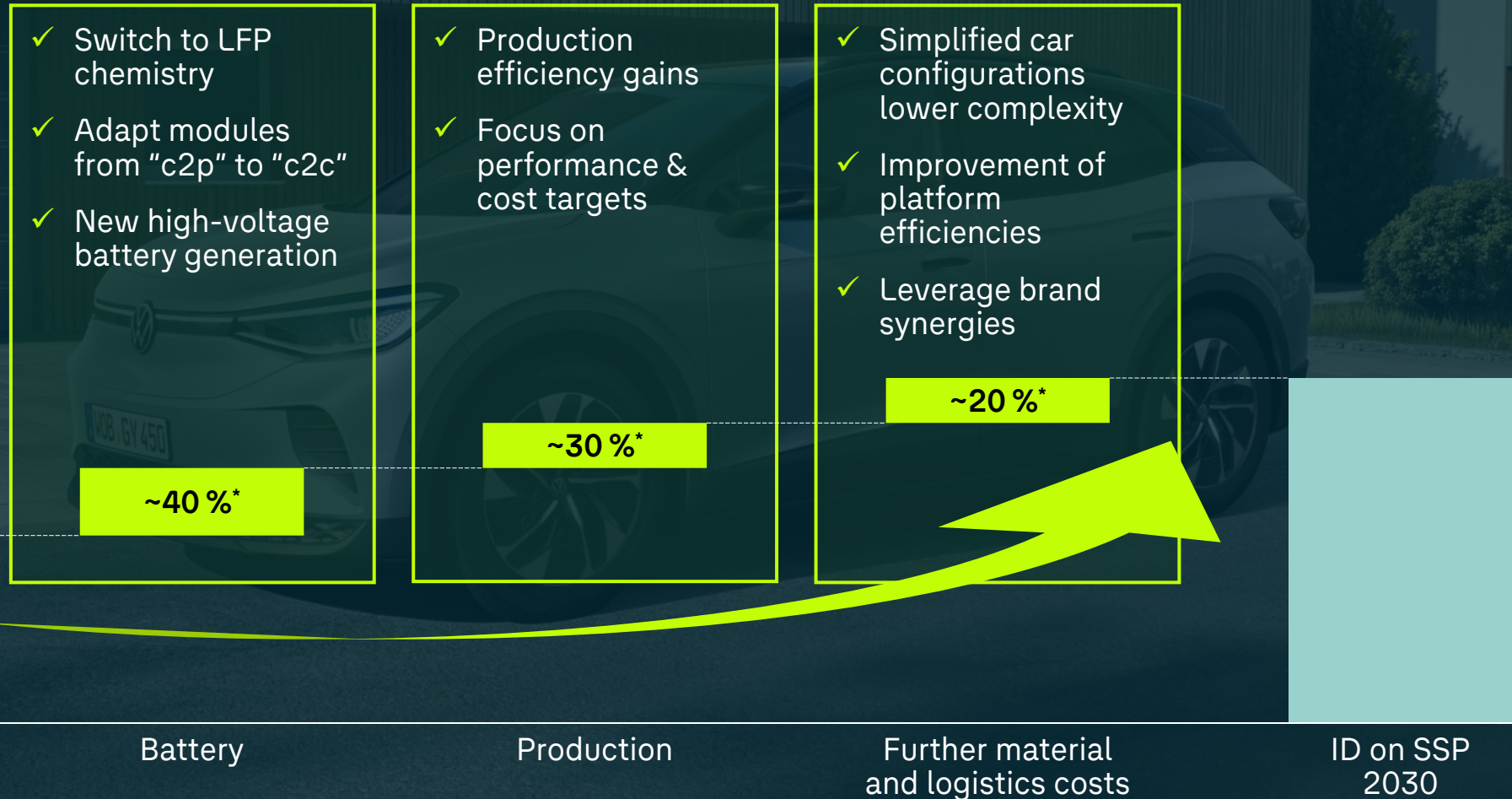
**SSP for a NEW ERA of MOBILITY**



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

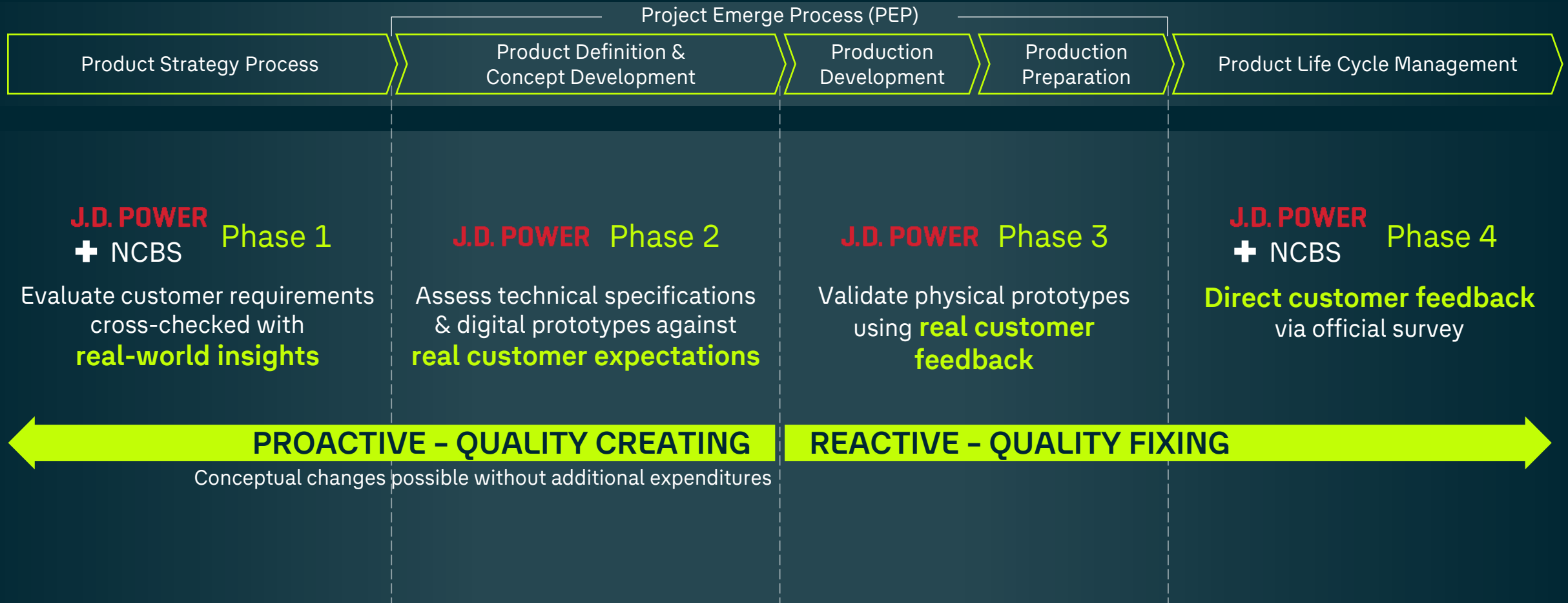
# Significant improvement through value chain to enable profitable tech

ILLUSTRATIVE



\*Comparison based on contribution margin, optimization of cost blocks

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





# Innovation for all – Bringing premium features to every segment

SELECTION

## 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.Each1

**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



ID. Polo



ID. CROSS Concept



SKODA



EPIQ



CUPRA



URBAN REBEL



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

**Prices starting**  
**at ~25,000 EUR**

**>600m EUR**  
**synergies<sup>1</sup>**

Pictures shown are concept cars/ near production vehicles , interior/ exterior pictures for ID. Polo based on ID.2ALL Concept car 1) savings over lifetime



# Volkswagen ID. Polo & ID. CROSS Concept



*ID. Polo - The Golf among small cars*



*ID. CROSS Concept - An unlimited compact-SUV*

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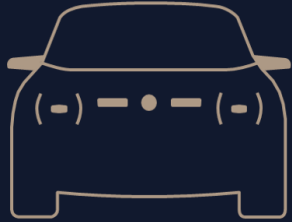
**Making premium features  
accessible for many**

---

**From Europe  
for Europe**

---

**Optimal use of space  
& functionality**

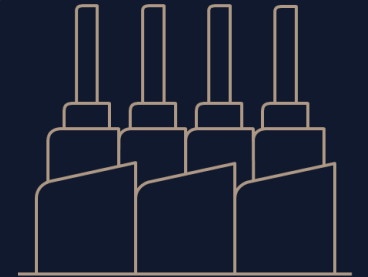


We lead

**TECHNOLOGY**

We are a

**HIGH-PERFORMING  
ORGANISATION**



Volkswagen  
**BOOST**  
2030



We are a

**GLOBAL BRAND**

OUR

**CUSTOMERS AND  
EMPLOYEES ARE INSPIRED**





# Key Takeaways of Brand Group Core



Commercial  
Vehicles

Governance as enabler

➤ **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**



SKODA

Targeting the right profit pools with the most desirable products

➤ **Consistent BEV transformation while keeping balanced ICE/ hybrid presence**



SEAT

Desirable products that excite our customers

➤ **Our Electric Urban Car Family sets new standards**



CUPRA

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**

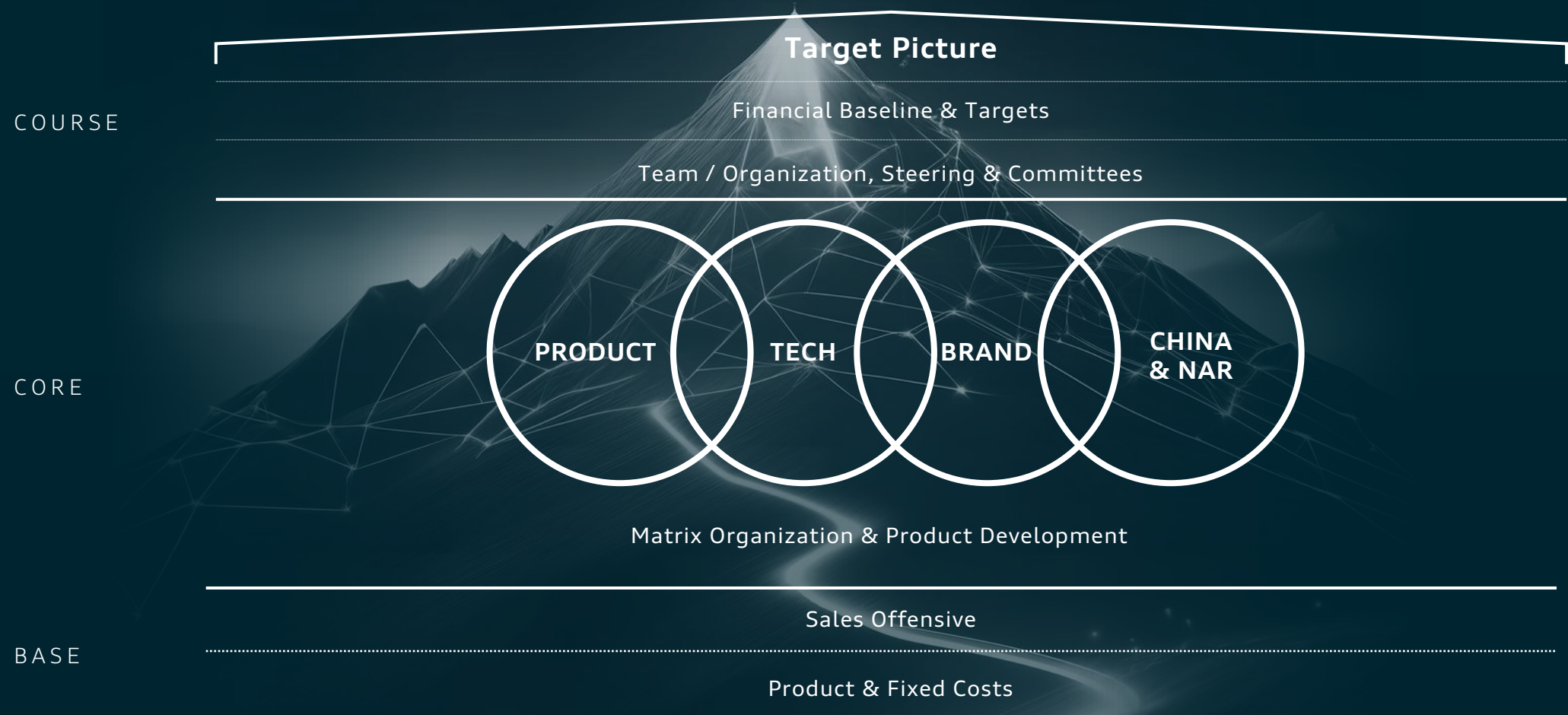
- Unparalleled **racing icon** – on the **street**, and recently also **offroad**
- High customer **loyalty** and enthusiastic **community** of **Ducatisti**





# Audi Agenda

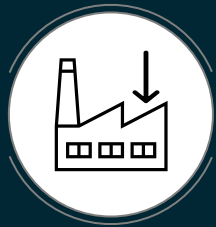
Clear strategic guidance and a solid foundation for a comprehensive transformation since 09/2023





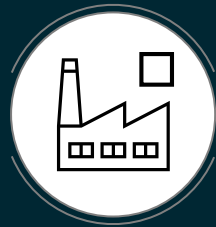
# Restructuring of the company is in full swing

## Decisive steps taken



capacity reduction  
of German sites

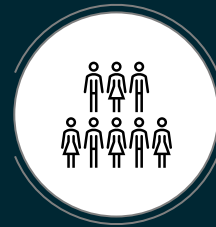
**-25%**



closure of the  
Brussels site,

**-120k**

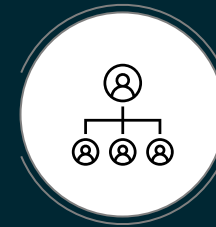
capacity



**-7.5k**  
jobs cut agreed, variable  
pay adjusted, leading to

**>€1bn**

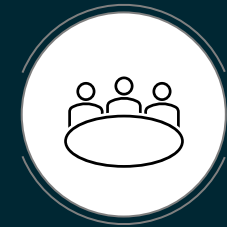
mid-term savings p.a.



reorganization  
in functional areas,  
reduction of approx.

**-400/-20%**

management positions



streamlined  
decision-making

**-85%**

committees reduction



# Largest model initiative of Audi's history

More than 20 new models by the end of 2025

Previous model launches<sup>1</sup>



BEV



Audi Q4 e-tron (FL)



Audi Q6 e-tron



Audi A6 e-tron



Audi e-tron GT (FL)



Entry BEV

2024/25

2026



ICE



Audi A5



Audi Q5



Audi A6



Audi Q3



Audi Q7



Audi Q9



PHEV



∅ Portfolio age reduced by ~3 years

PPE/PPC as backbone

Broad range of RS/S models

10 new PHEV by the end of 2025

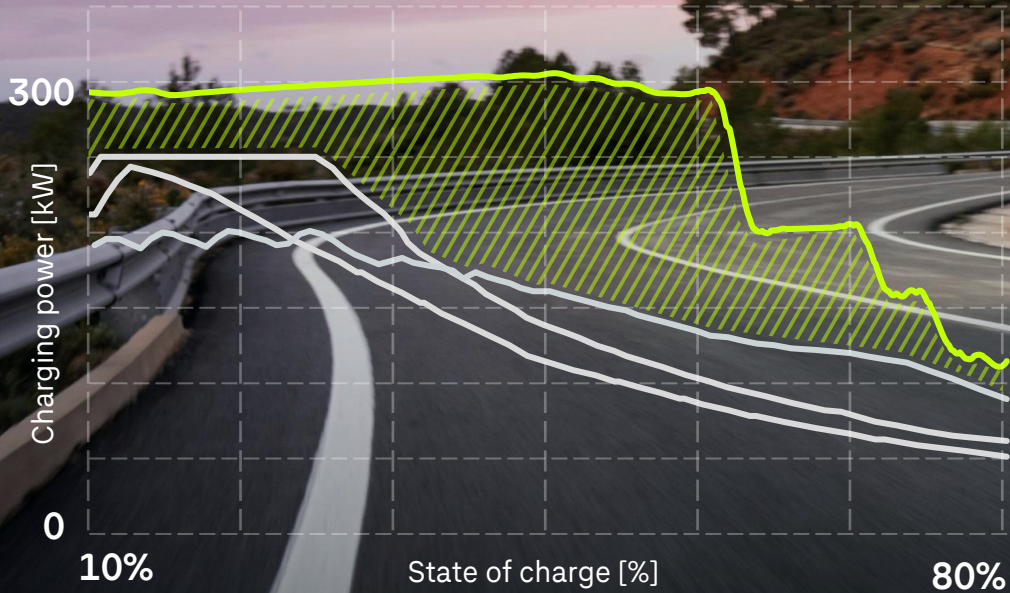
<sup>1</sup> Market Introduction in Germany



# Audi RS e-tron GT performance

## Benchmark for performance and charging

Audi e-tron GT ~ 18 min  
Competitor 1-3 ~ 25-38 min



Power up to 925 hp,  
2.5s (0-100 km/h)

Maximum range  
592 km

Charging 10-80%  
in approx. 18 min

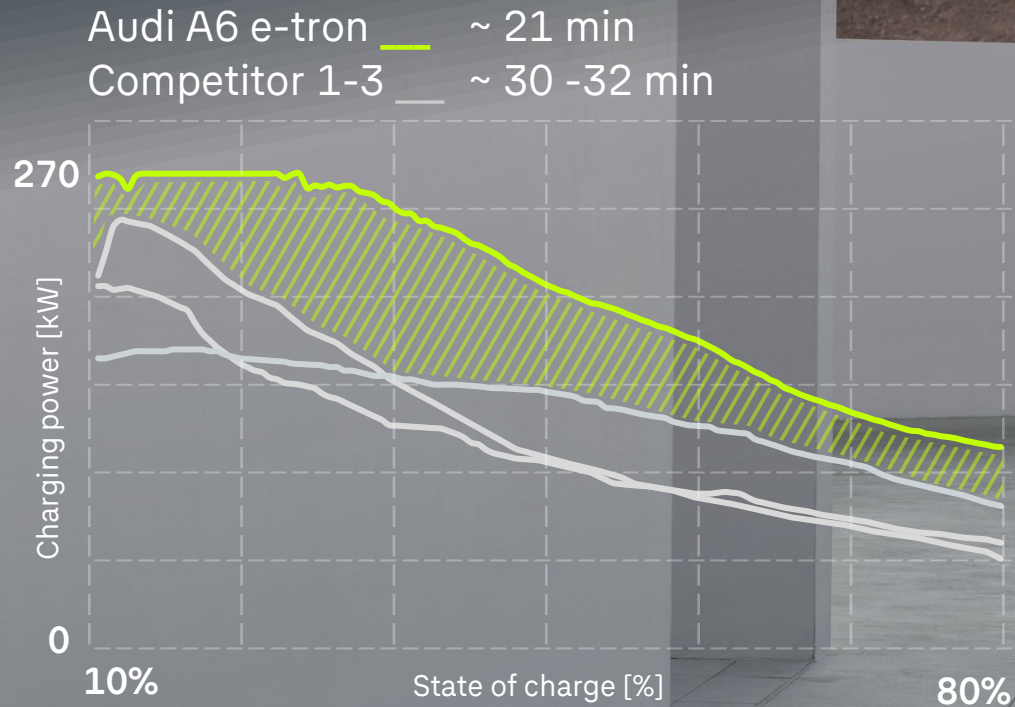
Up to 320 kW  
charging power





# 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



-BEV



- Convincing performance, range, efficiency and charging experience



-ICE



- MHEV plus enhances performance and comfort and reduces CO<sub>2</sub>



-PHEV



- 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



# New AUDI brand: E5 Sportback as a pioneer

We are tapping into new and tech-savvy customer segments in China



  
**3.4s**  
 0-100 km/h

  
**AUDI**  
 Assistant

  
**OTA**  
 ability

  
**800V**  
 technology

  
 Range up to  
**750 km**

  
**quattro**  
 drivetrain

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

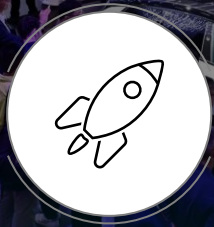
Benchmark  
 for time-to-market

Based on the Advanced  
 Digitized Platform (ADP)

1st gen includes  
 3 ICV until 2027

# Shanghai Motorshow 2025

Overwhelmingly positive feedback and broad reach



5 world premieres



99% positive feedback



161m net reach on the first day

奥迪时代：  
由此启程！

The Audi momentum:  
This is our time!





# 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

Targets will be disclosed at a later stage

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)

**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 AI 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**

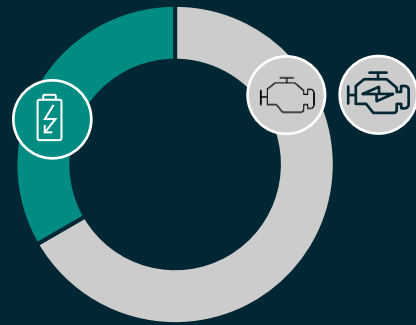
**Cost Discipline & Group Synergies**

**Sustainability as Value Driver**

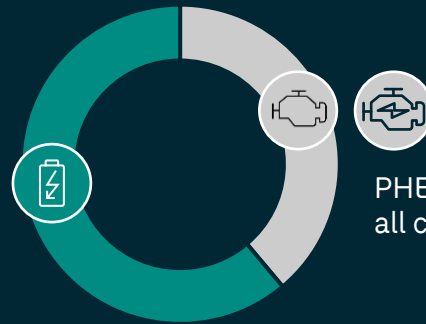


# High flexibility on our way to a BEV-only-portfolio

Streamlined FBU target portfolio with 11 BEV model lines



2025



2030s

PHEV offering in all core ICE model lines



Long-term

Maximum flexibility in transition phase

Selected icons to enhance desirability

Higher positioning (Progressive Premium)

Focus on localized products China/NAR



# Streamlining platforms, amplifying Group synergies

## Significant reduction in complexity towards SSP and SDV

Overview of platforms and E/E architectures (EU and NAR)



RIVIAN | VOLKSWAGEN GROUP  
TECHNOLOGIES

BEV



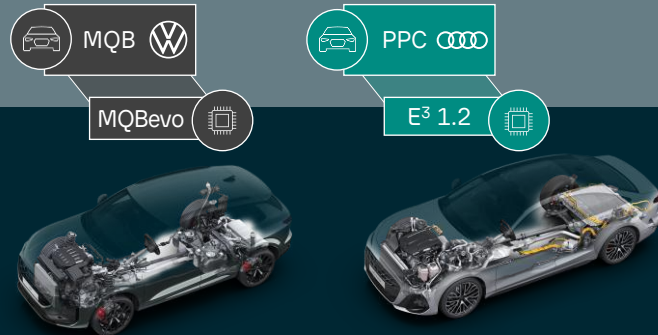
2027\*  
1st SDV



Scalable System Platform (SSP)



ICE/PHEV



ICE adaption SDV under final review

Phase-out based on customer demand and regulations

\* Initial SOP Audi brand perspective

= Audi Lead

= Hardware

= E/E



# Strong partnerships on the path to software-defined-vehicles

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

RIVIAN | VOLKSWAGEN GROUP  
TECHNOLOGIES

**BOSCH** **mobileye** **Qualcomm** **harman/kardon**

ADAS SEMICONDUCTORS APPS

CARIAD VOLKSWAGEN GROUP  
CHINA TECHNOLOGY CO.

Premium Platform Electric / E³1.2 China Electronic Architecture

CARThunder **ThunderSoft** CARIAD **HUAWEI** CARIZON **SAIC** **AUDI** **momenta**

CONNECTIVITY & INFOTAINMENT ADAS

Streamlined CARIAD governance

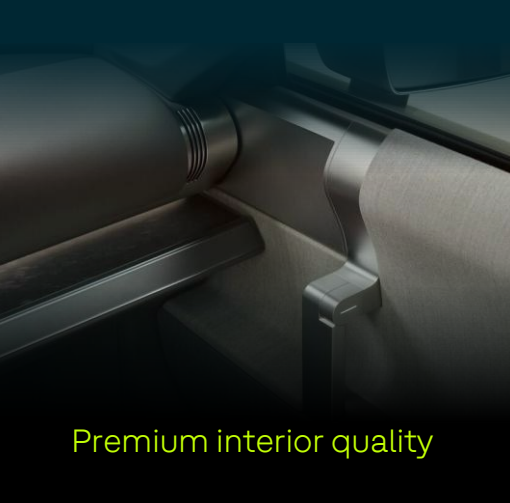
Strong partnerships with a clear job split

Superior features and reduced time-to-market



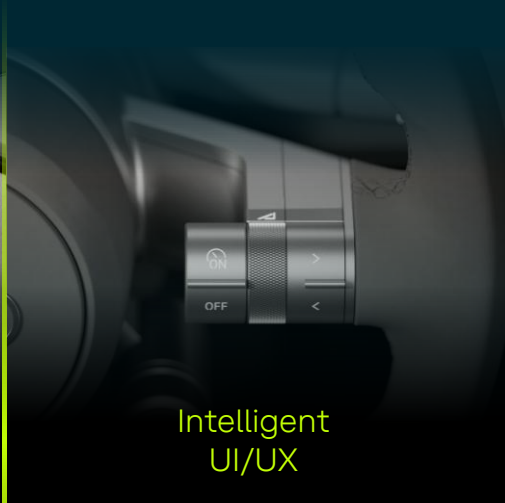
# A fully connected interior with intelligent UI/UX

Personalized experiences – the car becomes an empathetic companion



Premium interior quality

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



Intelligent UI/UX

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



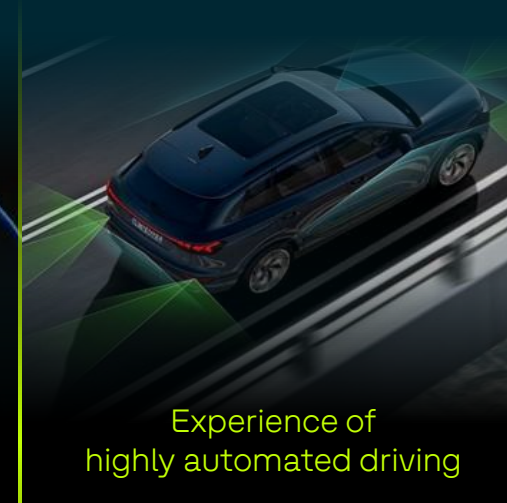
Fully connected interior

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



Empathetic AI assistant

- 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



Experience of highly automated driving

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

»» The result is a stronger emotional relationship between user, product and brand ««



# Audi Concept C: manifestation of a new design philosophy

Concept car embodies radical simplicity and technical precision



# Brand Group Progressive | Key takeaways



- 01** Decisive actions taken since 2023 – driving Audi's turnaround
- 02** Audi's model initiative is in full swing – youngest lineup among core competition
- 03** In response to current challenges, Audi is advancing its transformation with full force
- 04** Audi's Strategy 2030+ tackles core issues and provides a focused path forward
- 05** 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

# Porsche – A unique Story



ICONIC  
BRAND

RESILIENT  
PERFORMANCE

SUSTAINABLE  
LUXURY

PERFORMANCE  
CULTURE

911 Carrera 4S (WLTP): Fuel consumption combined: 11.0 – 10.5 l/100 km; CO<sub>2</sub> emissions combined: 249 – 237 g/km; CO<sub>2</sub> class: G; Status 09/2025

# We have a strong foundation

## CUSTOMER

STRONG CUSTOMER  
BASE

UNIQUE COMMUNITY

EXCEPTIONAL  
CUSTOMER LOYALTY

## PRODUCT

DESIRABLE PRODUCTS

BALANCED DRIVETRAIN  
OFFERING

INDIVIDUALISATION  
EXPERIENCE

## BRAND

STRONG BRAND

HERITAGE &  
EXCLUSIVITY

PERFORMANCE &  
MOTORSPORTS

# Porsche Product Lineup

NEW

NEW

NEW

NEW

NEW



*Macan*

*Taycan*

*718*

*Cayenne*

*Panamera*

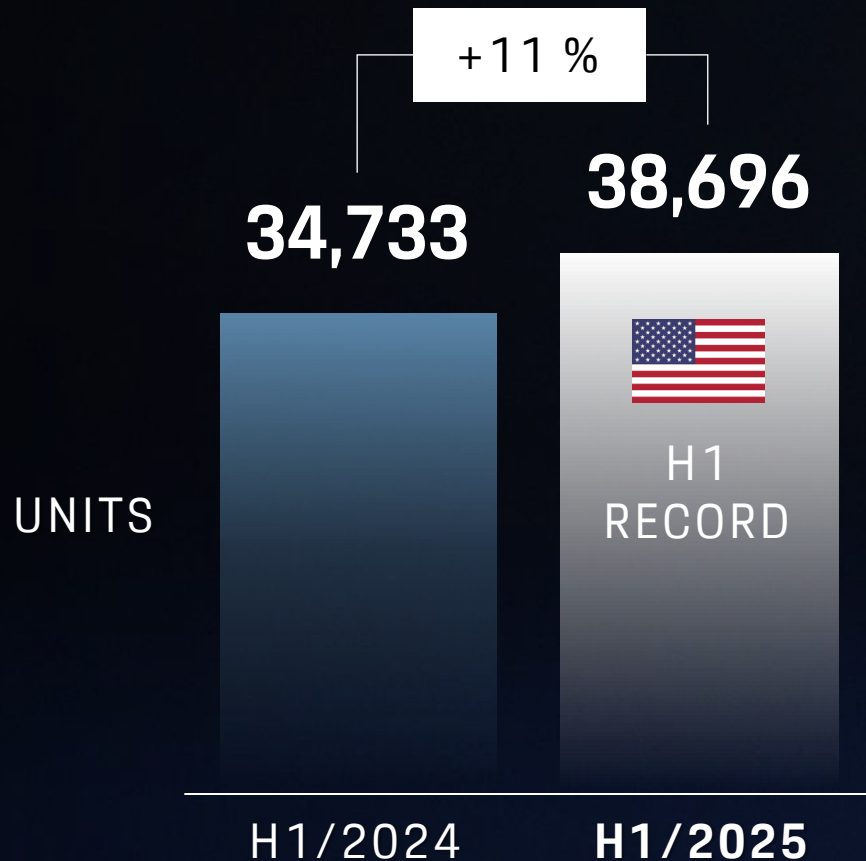
**911**

# 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



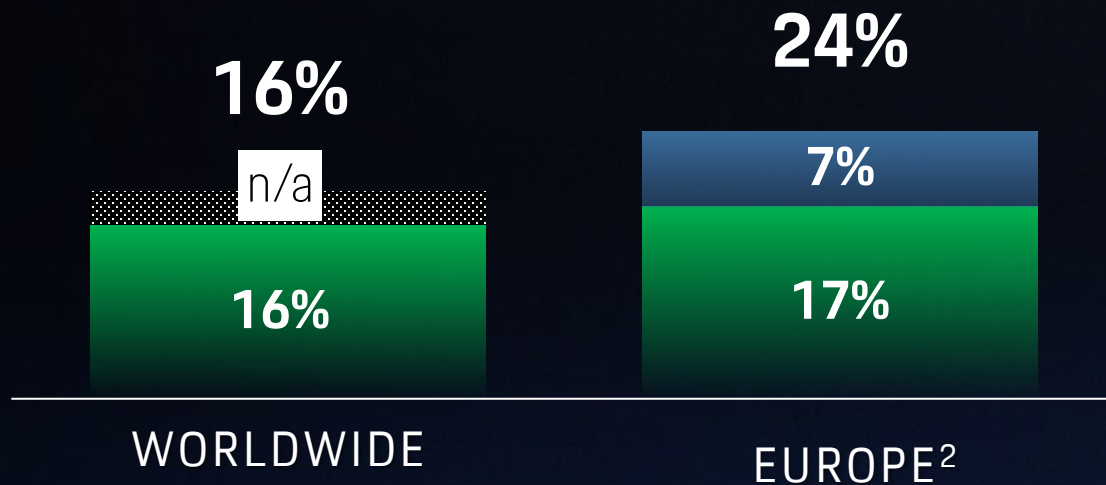
**Tariff mitigation in process**

Utilization of pricing strategies and strong brand equity

# Porsche BEV/PHEV performance significantly ahead of total market

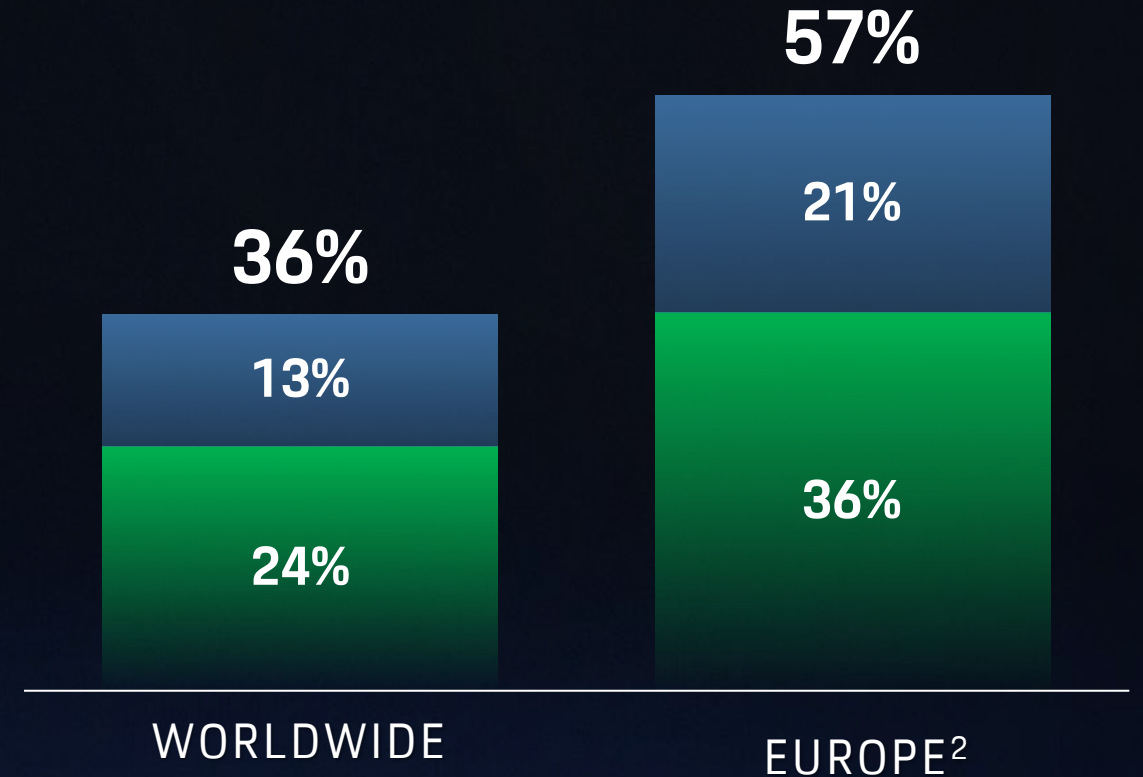
## Total Automotive Market<sup>1</sup>

BEV/PHEV-Share H1/25



## Porsche

BEV/PHEV-Share H1/25<sup>3</sup>



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<sup>1</sup> H1/25

PORSCHE

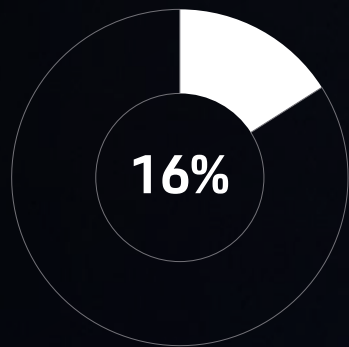
*Taycan*

*Macan*

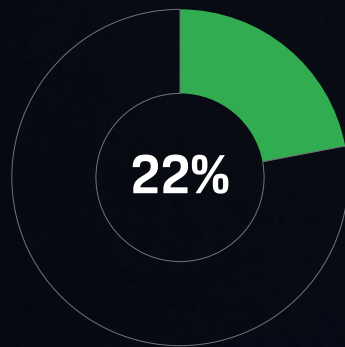
All models

Taycan Segment

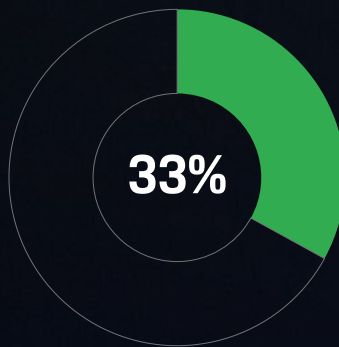
Macan BEV Segment



16%



22%



33%

**Porsche BEV-Share<sup>2</sup>: 36 %**

**Porsche BEV/PHEV-Share<sup>2</sup>: 57 %**

1) Source: 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 best-selling model in Europe<sup>2</sup>**

# Extensive measures initiated to strengthen financial resilience

## ENVIRONMENT

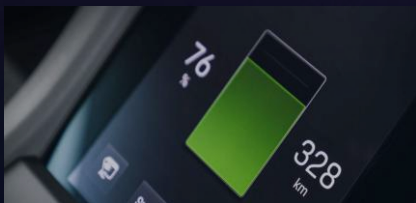
China



USA



BEV-Transition



## REACTION: STRATEGIC REALIGNMENT

**Product Portfolio**



**Focus on the Core**



**Push-to-Pass**

Push-to-Pass



**Structural Package**



- in negotiation -



## EFFECT

### Short-term (2025)

Extraordinary expenses in connection with strategic realignment → lower margin

### Mid- / Long-term

Increased financial resilience

# Extensive measures initiated to strengthen financial resilience and profitability

## Product Portfolio



FOCUS TODAY

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

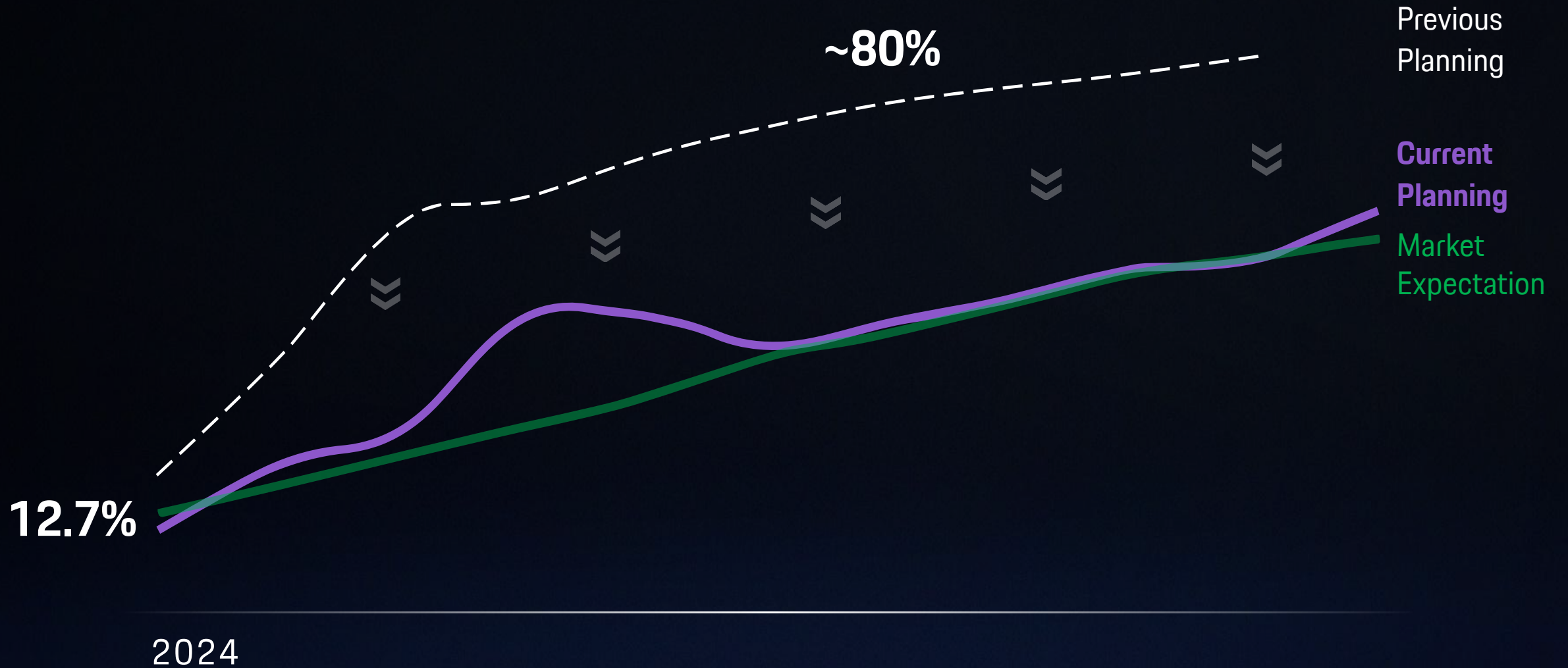


ICE

PHEV

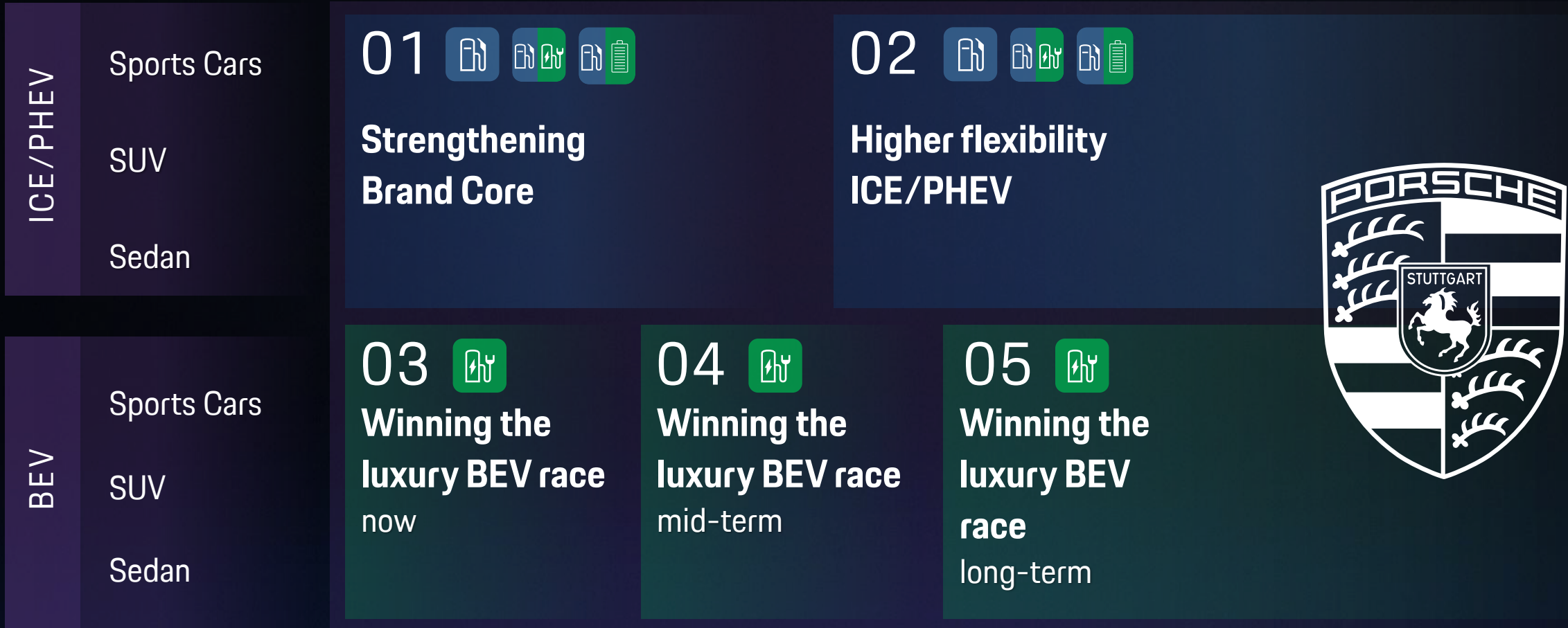
BEV

# Aligning the BEV transition to market expectations










# Porsche Product Strategy

- schematic visualization -



# Strong product portfolio offering flexibility in the transition

	SPORTS CARS	SPORTS LIMOUSINES	SPORT UTILITY VEHICLES
	<p><b>911</b></p> 	<p><i>Panamera</i></p> 	<p>NEW</p> 
	<p><b>718</b></p> 	<p><i>Taycan</i></p> 	<p><i>Cayenne</i></p> 
			<p><i>Macan</i></p> <p>NEW</p> 
	ICE/HEV ✓	ICE/PHEV ✓	ICE/PHEV ✓
	BEV ✓	BEV ✓	BEV ✓

**Offering**  
well into  
the 2030s



# STRENGTHENING OUR BRAND CORE

911 Dakar (WLTP): Fuel consumption combined: 11.3 l/100 km; CO<sub>2</sub> emissions combined: 256 g/km; CO<sub>2</sub> class: G; Status 09/2025



# Elevating Individualisation Experience



DESIRABILITY



INDIVIDUALISATION

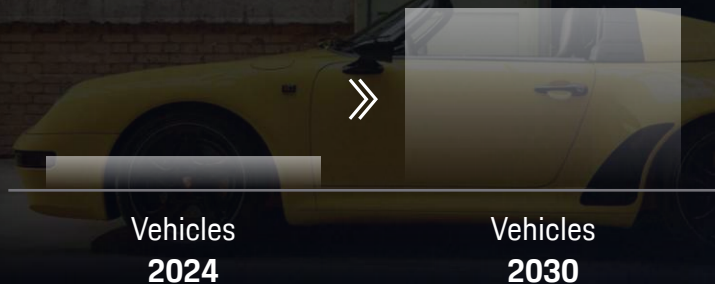


SPECIAL EDITIONS

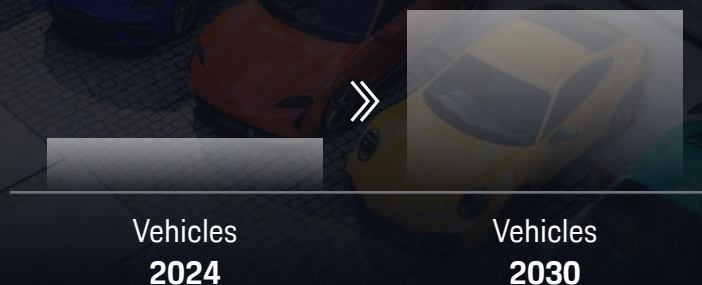
911 Spirit 70 (WLTP): Fuel consumption combined: 10.9 – 10.7 l/100 km; CO<sub>2</sub> emissions combined: 246 – 242 g/km; CO<sub>2</sub> class: G; Status 09/2025

# Exploiting the strong potential of Individualisation with clear focus on exclusivity

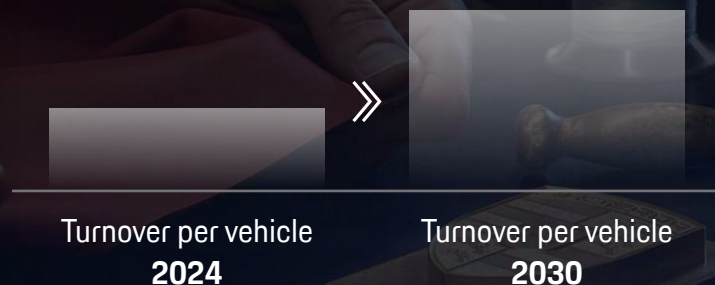
*Sonderwunsch*



Paint to Sample



*Exclusive Manufaktur*



HOME OF  
INDIVIDUALISATION  
& CLASSIC

even more **"Halo-Vehicles"**

CORE

HERITAGE

OFFROAD ...

# HALO Strategy with Lighthouse Projects that strengthen Porsche brand



GT



ADVENTURE



HERITAGE



URBAN

ULTIMATE  
PERFORMANCE

OUTDOOR SPORTS  
AND ADVENTURES

ICONIC DESIGNS  
AND MATERIALS

COSMOPOLITAN  
DESIGN

TRACK »

« LIFESTYLE

Cayenne Turbo GT - no offer in Europe; 911 Dakar (WLTP): Fuel consumption combined: 11.3 l/100 km; CO<sub>2</sub> emissions combined: 256 g/km; CO<sub>2</sub> class: G; Status 09/2025

# 911

## SPIRIT 70



COMBINES OUR HERITAGE  
WITH STATE-OF-THE-ART  
TECHNOLOGY



STARTING AT  
240,000 €



LIMITED TO JUST  
1,500 UNITS

911 Spirit 70 (WLTP): Fuel consumption combined (model range): 10.8 – 10.7 l/100 km, CO<sub>2</sub>-emissions combined (model range): 246 – 242 g/km

# 911

## TURBO S



911 Turbo S

523 kW **711 PS**

0 – 200 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**

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

# 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



**V4SMART**  
German battery expertise since 1887



  
Porsche Werkzeugbau Group

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 l/100 km; CO<sub>2</sub> emissions combined: 289 – 277 g/km; CO<sub>2</sub> class: G; Status 09/2025

**911 Carrera GTS (WLTP):** Fuel consumption combined: 11.0 – 10.4 l/100 km; CO<sub>2</sub> emissions combined: 248 – 236 g/km; CO<sub>2</sub> class: G; Status 09/2025

**Panamera GTS (WLTP):** Fuel consumption combined: 12.5 – 11.6 l/100 km; CO<sub>2</sub> emissions combined: 284 – 265 g/km; CO<sub>2</sub> class: G; Status 09/2025



# WINNING THE LUXURY BEV RACE

**Taycan Turbo (WLTP):** Electrical consumption combined: 20.0 – 17.7 kWh/100 km; CO<sub>2</sub> emissions combined: 0 g/km; CO<sub>2</sub> class: A; Status 09/2025

**Macan Turbo (WLTP):** Electrical consumption combined: 20.7 – 18.9 kWh/100 km; CO<sub>2</sub> emissions combined: 0 g/km; CO<sub>2</sub> class: A; Status 09/2025

**Macan 4S (WLTP):** Electrical consumption combined: 20.7 – 17.7 kWh/100 km; CO<sub>2</sub> emissions combined: 0 g/km; CO<sub>2</sub> class: A; Status 09/2025



# Cayenne

Next Level E-Performance

> 735 kW > **1000 PS**

0 – 100 km/h

**<< 3 s**

WLTP Range

**> 600 km**

Charging Highlights

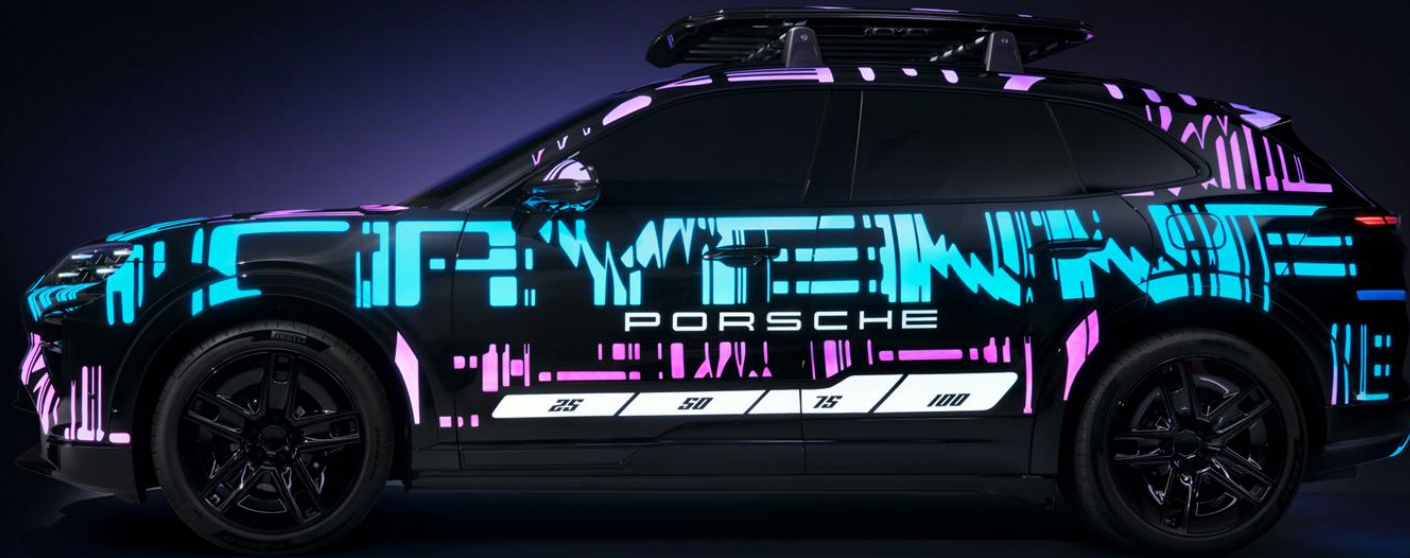
**400 kW DC Charging**

**Wireless Charging**

Typical Cayenne

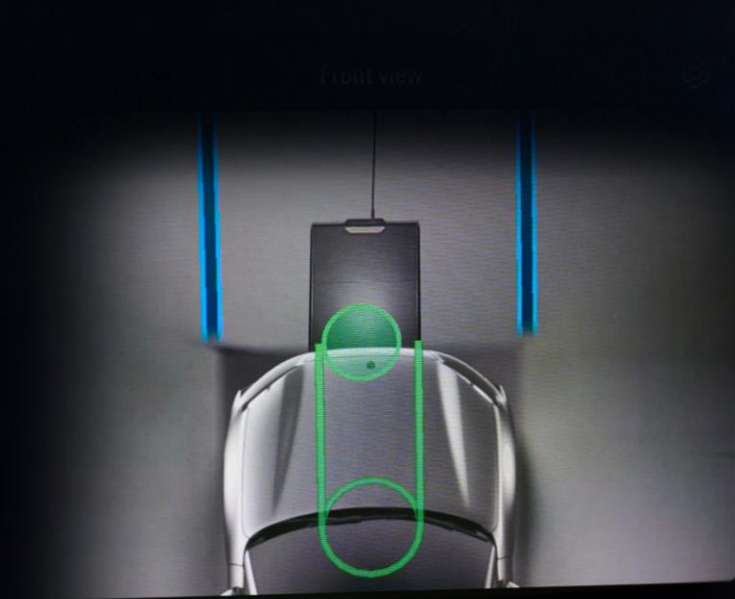
**Offroad Capabilities**

**3.5 t Towing Capacity**



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.

# 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 AI 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**



911 Carrera 4S (WLTP): Fuel consumption combined: 11.0 – 10.5 l/100 km; CO<sub>2</sub> emissions combined: 249 – 237 g/km; CO<sub>2</sub> class: G; Status 09/2025

**VOLKSWAGEN GROUP**

# Range / consumptions / emissions

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

# Range / consumptions / emissions

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

# Range / consumptions / emissions

Model	Fuel consumption combined (WLTP)	Electrical consumption combined (WLTP)	CO <sub>2</sub> emissions combined (WLTP)	Electric range combined (WLTP)
<b>Bentley</b>				
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
<b>Lamborghini</b>				
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.			
<b>Seat / Cupra</b>				
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 data under review.			



# Range / consumptions / emissions

Model	Fuel consumption combined (WLTP)	Electrical consumption combined (WLTP)	CO <sub>2</sub> emissions combined (WLTP)	Electric range combined (WLTP)
<b>Audi</b>				
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
<b>Scout</b>				
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 emission data under review.			
<del>Jetta (China)</del>				
Jetta (VA7, China)	The vehicle is not offered for sale in Europe.			