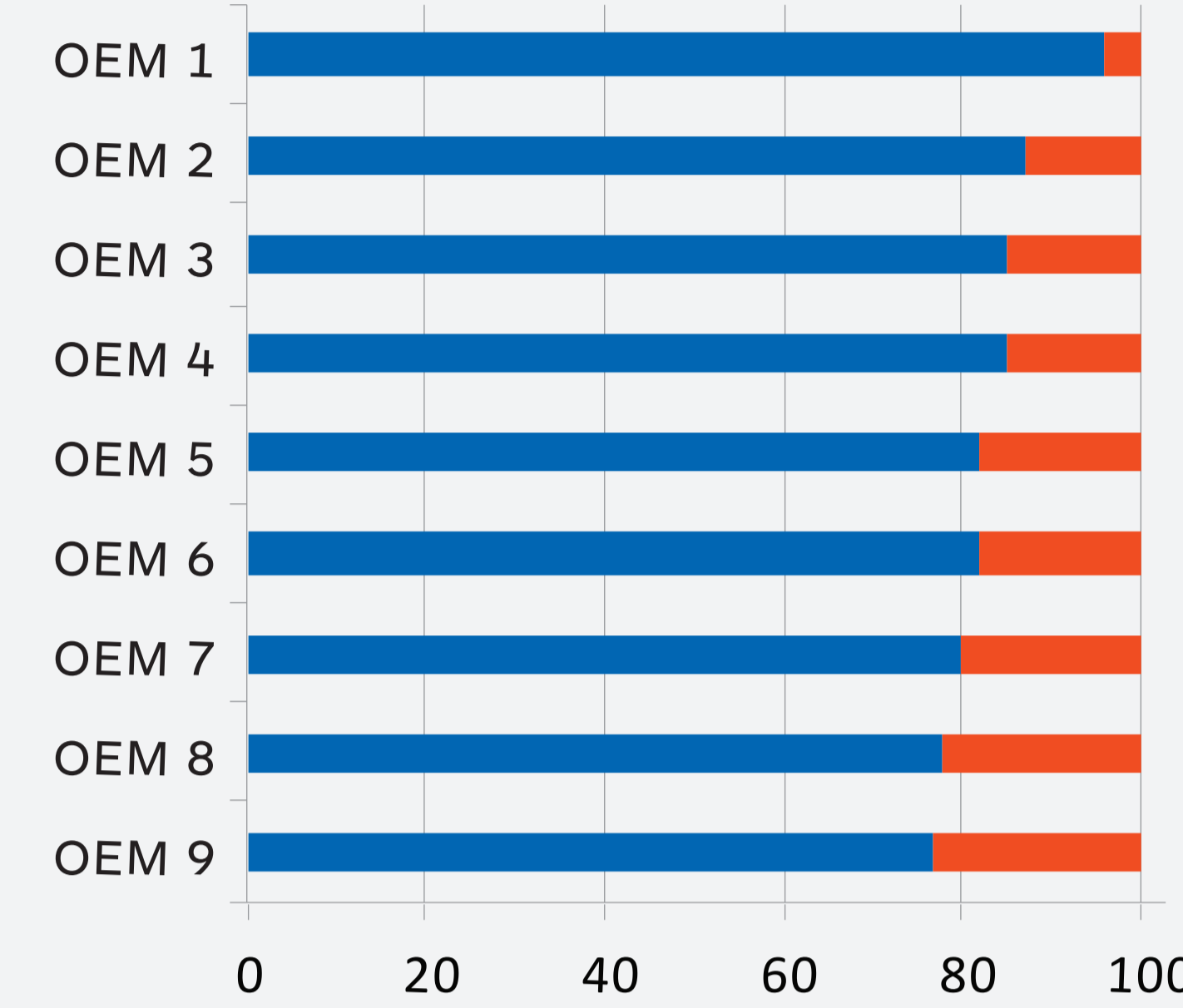


Many OEMs will still be challenged to meet future emissions regulations

9 out of 9

US passenger car manufacturers of record

- Compliant
- Missing to Compliant
- Overcompliant



Competitive Trade-off

U.S. OEMs that are further behind may have to sacrifice vehicle performance to become compliant.



GMC leads the pack in the "fun to drive" category with highest HP:MPG = 9.7

C Segment Average HP:MPG= 5.5

Lowest Brand HP:MPG=4.2

Will your vehicle fleet be compliant?

IHS AUTOMOTIVE
driven by POLK



\$400 billion

Estimated global incremental spend on technology solutions for light-duty vehicle energy management to 2020.

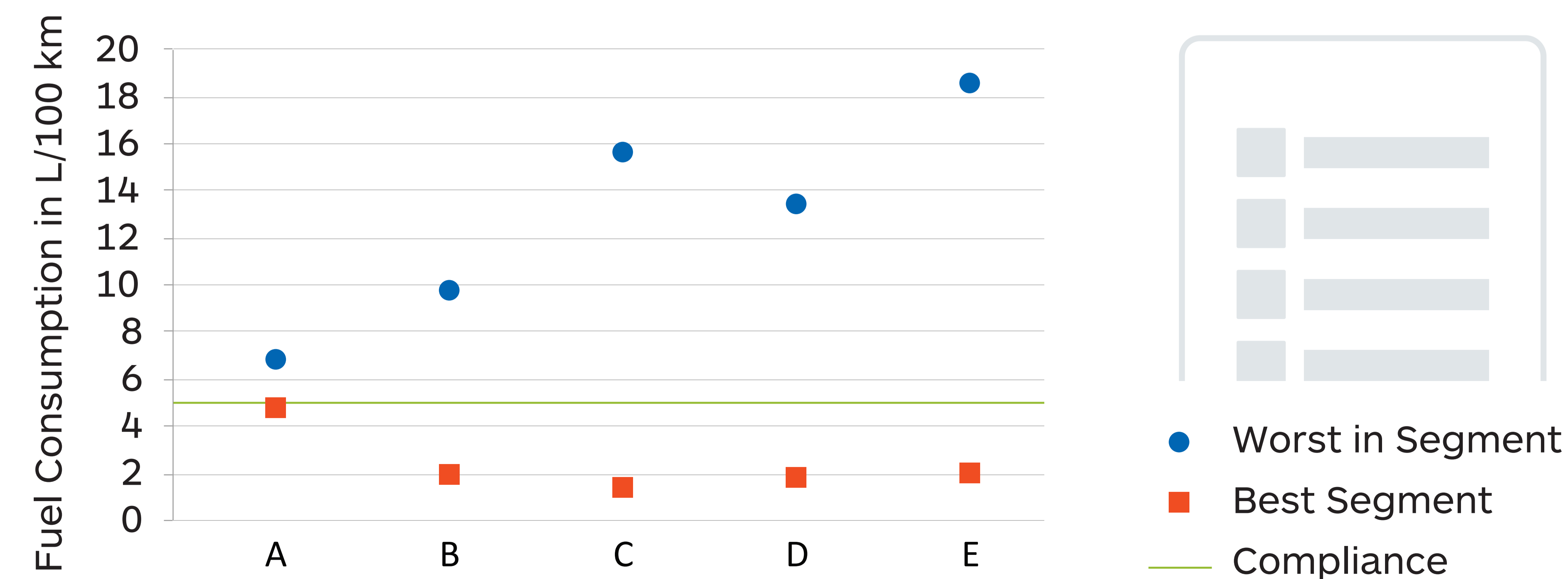
15.1g/km
average reduction in CO₂

across the Top 30 EU28 Fleets (between 2015 and 2021)



Each segment tells a different compliance story

China; 2021



Balancing powertrain R&D with market demand and regulatory compliance can be complex and costly. Are you leading or lagging the market? What are the implications?

Learn more at www.ih.com/automotive.

