Setting the Stage: The CASE for the Future of the Automotive Industry

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The state of the industry in 2018
Industry sales

Total sales (MM)

Retail sales (MM)

09  10.4  8.6
17  17.2 14.0
19F 16.8 13.6

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Prices & Consumer spend

Transaction prices ($K)

Consumer Expenditure ($B)

09
$25.9
$224

17
$31.7
$444
Pressure is building

Pressure Deck
Incentive spending per unit ($K)
The future of the automotive industry ... ?
Connected Autonomous Shared Electric

CASE
Last things first: State of BEVs
EV share

Battery Electric (BEV)

Plug-In Electric (PHEV)

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Are EVs overpriced?

<table>
<thead>
<tr>
<th>EV MSRP</th>
<th>Federal Incentives</th>
<th>OEM Incentives</th>
<th>EV CFTP</th>
<th>Delta</th>
<th>ICE CFTP</th>
<th>OEM Incentives</th>
<th>ICE MSRP</th>
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<td>$35.0k</td>
<td>$7.5k</td>
<td>$9.6k</td>
<td>$17.9k</td>
<td>$0.7k</td>
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<td>$4.2k</td>
<td>$22.8k</td>
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Near-term is mild, not wild
CASE

- Autonomous
- Connected
- Electric
- Shared