

PICK UP RENAULT

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PRODUCT PLANNING

GROUPE RENAULT

SUMMARY

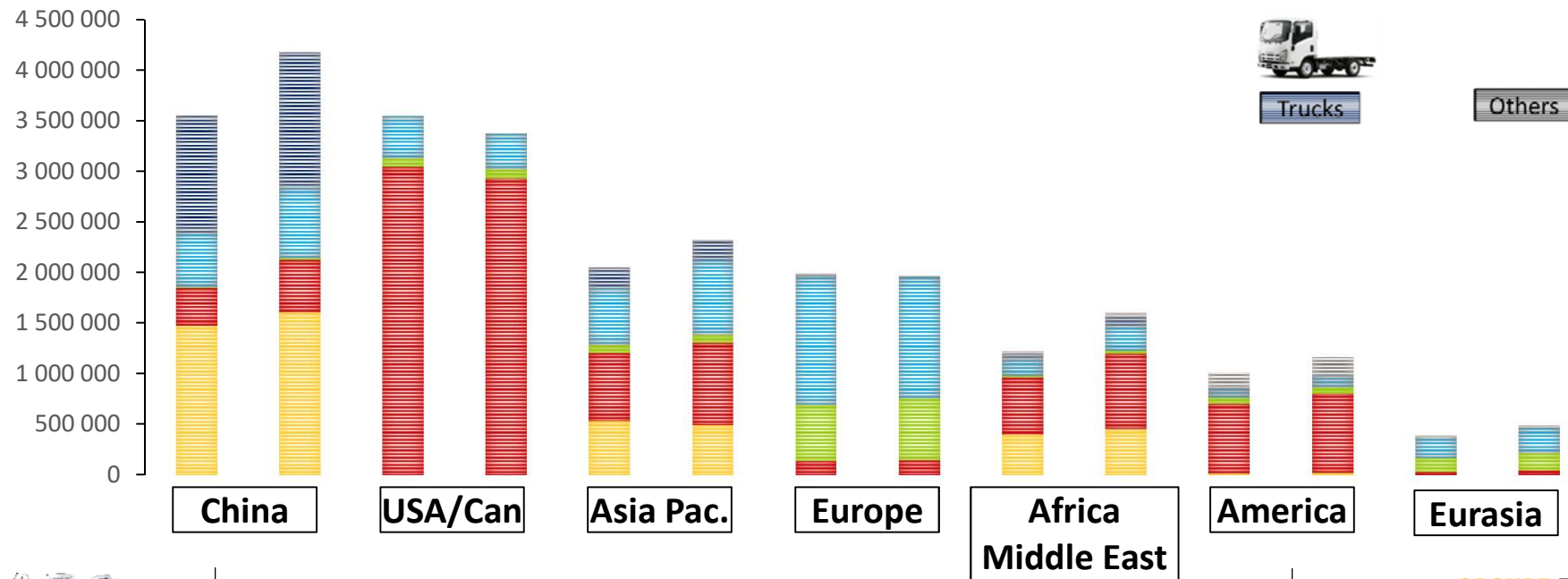
1. LCV and Pick up market
2. Pick up – range and specific features
3. Pick up – customers and usages
4. Renault Duster Oroch
5. Renault Alaskan



LCV and Pick up market



LCV World market 2016-2021

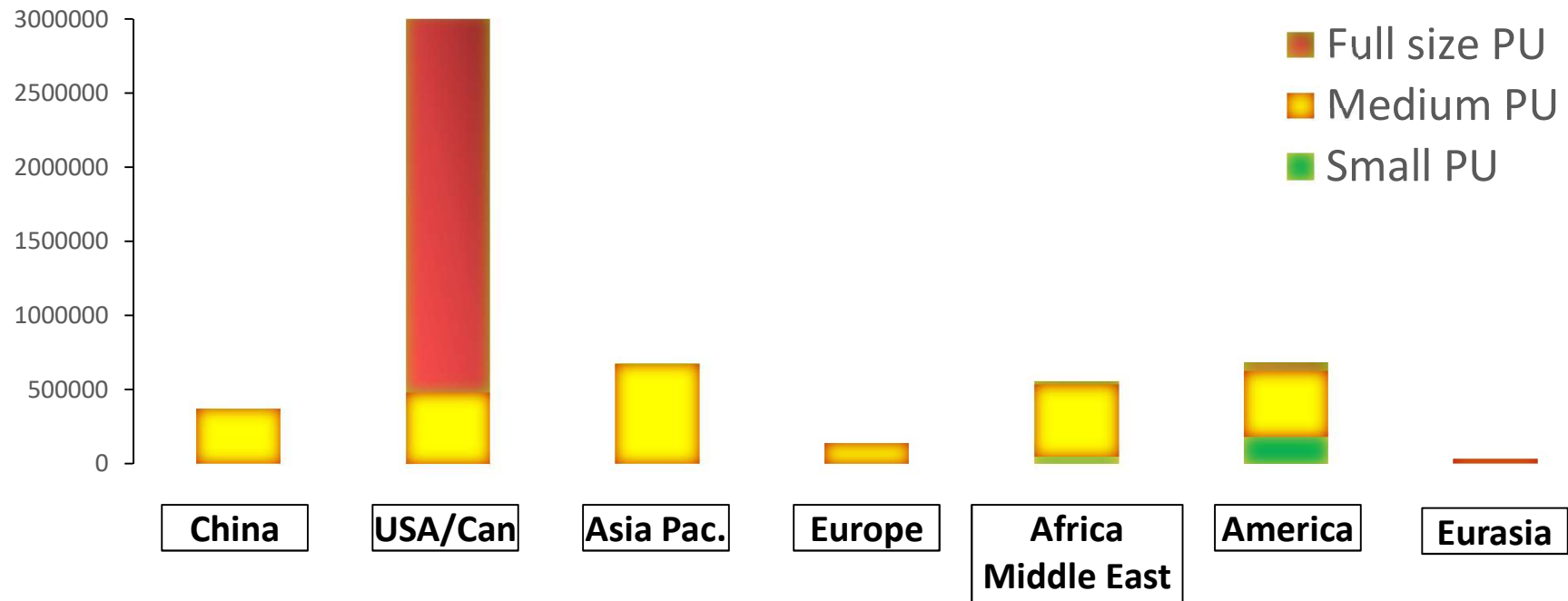


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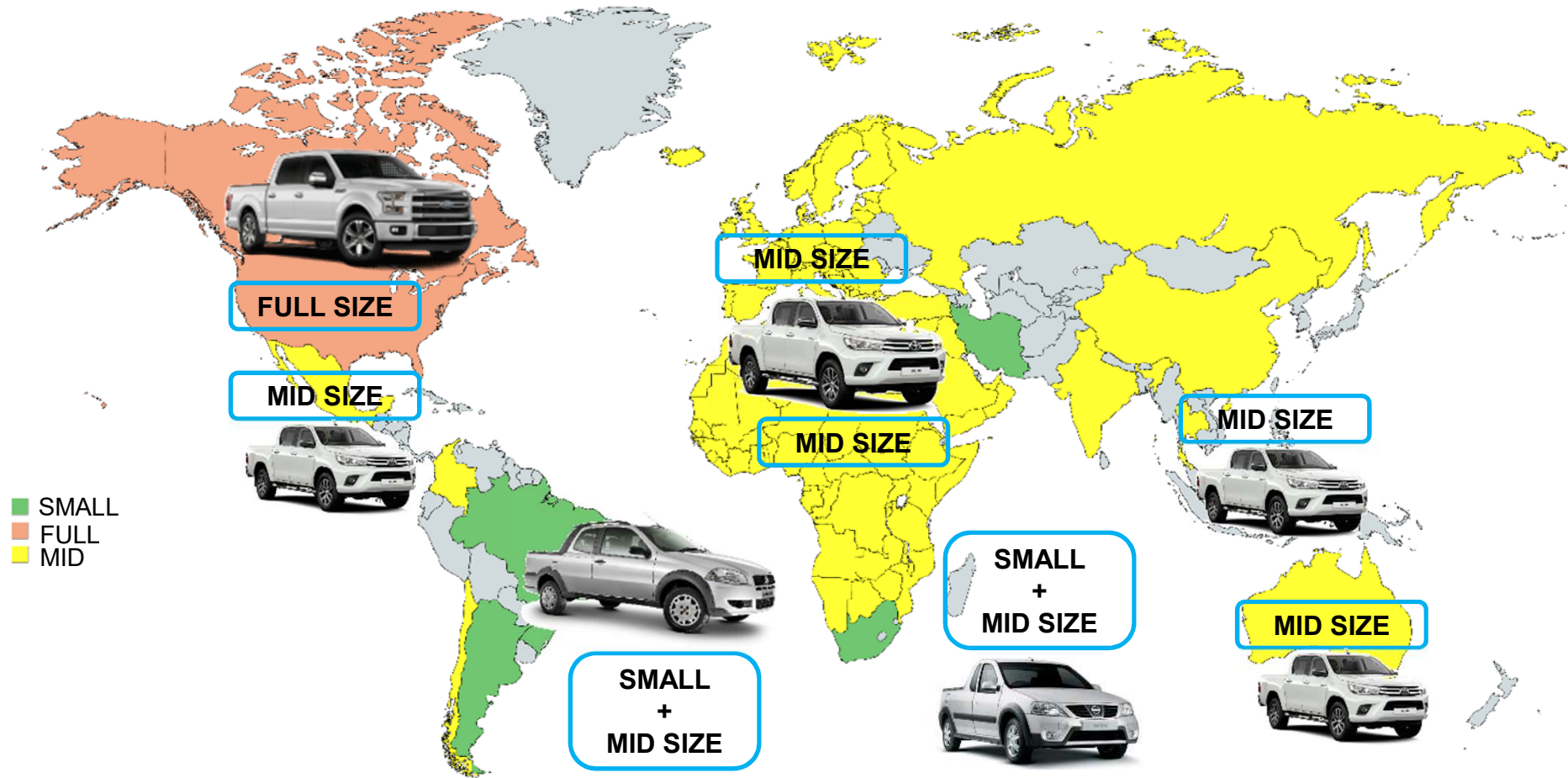
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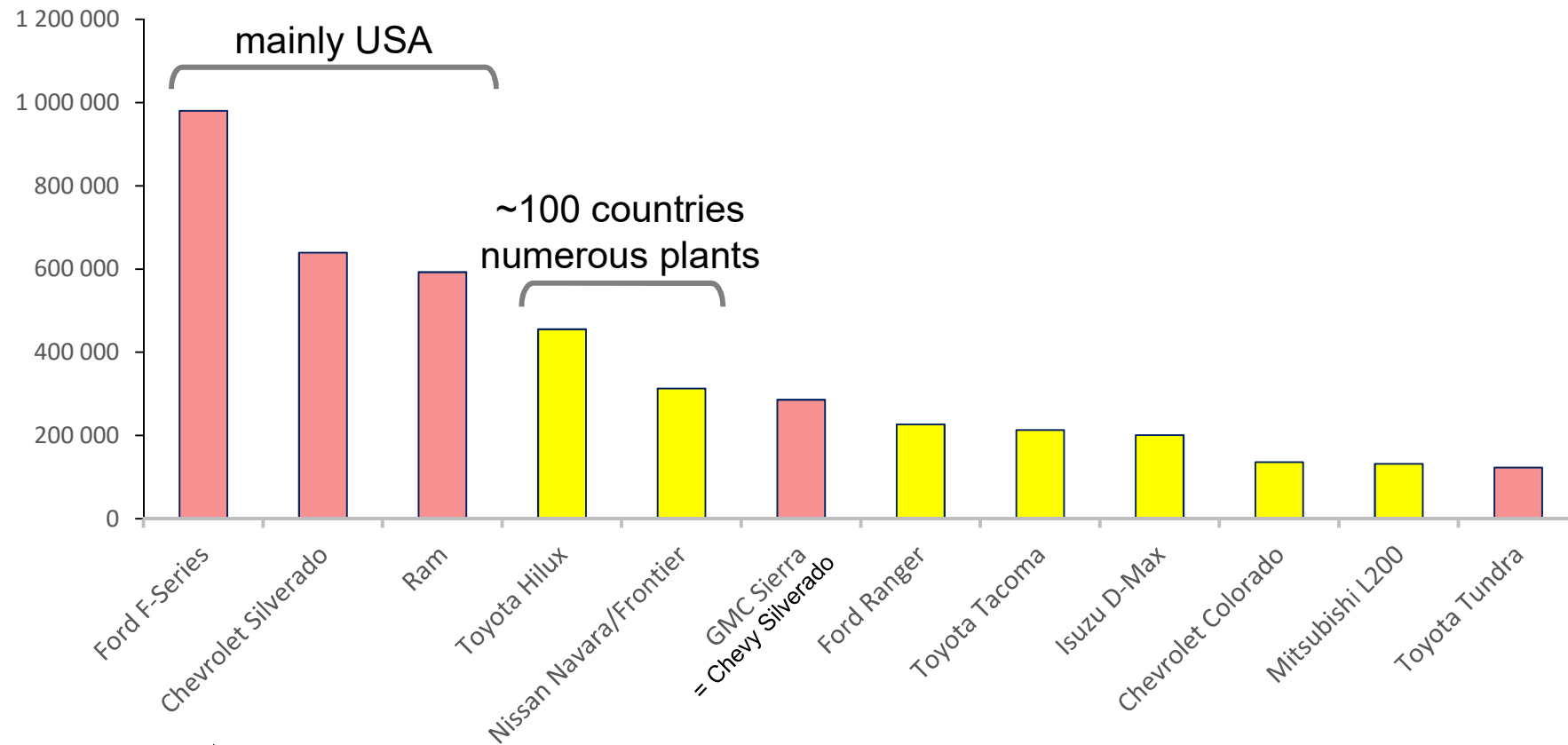
Pick up market 2016



Pick up expansion



Pick up top 12 models 2016



2016 top sales by market & model

United States			Brazil			Argentina			South Africa			Australia		
1	Ford F-Series	808 656	1	Hyundai HB20	163 194	1	Toyota Hilux	32 315	1	Toyota Hilux	34 837	1	Toyota Hilux	41 832
2	Chevrolet Silverado	573 847	2	Chevrolet Onix	145 126	2	Fiat Palio	30 820	2	Ford Ranger	30 632	2	Toyota Corolla	40 844
3	Ram P/U	490 562	3	Ford Ka	98 787	3	Volkswagen Gol	28 352	3	Volkswagen Polo Vivo	29 081	3	Hyundai i30	37 419
4	Toyota Camry	386 359	4	Fiat Palio	71 470	4	Renault Clio	25 836	4	Volkswagen Polo	20 451	4	Ford Ranger	37 082
5	Honda Civic	366 079	5	Toyota Etios	68 603	5	Toyota Etios	22 779	5	Toyota Ses'fikile	13 940	5	Mazda 3	35 977
6	Honda CR-V	355 870	6	Chevrolet Prisma	66 340	6	Chevrolet Corsa Classic	20 715	6	Nissan NP200	12 581	6	Holden Commodore	30 623
7	Toyota Corolla	354 644	7	Renault Sandero	64 331	7	Ford Focus	20 516	7	Isuzu D-Max	12 449	7	Mazda CX-5	24 508
8	Toyota RAV4	350 293	8	Toyota Corolla	63 411	8	Ford Ecosport	19 631	8	Chevrolet Chevy Utility	11 922	8	Toyota Camry	23 608
9	Honda Accord	343 202	9	Fiat Strada	60 358	9	Ford Fiesta	19 625	9	Ford Fiesta	11 715	9	Holden Colorado	22 068
10	Nissan Rogue	316 432	10	Honda HR-V	57 631	10	Peugeot 208	19 034	10	Ford Ecosport	11 628	10	Mitsubishi Triton	21 713
						11	Volkswagen Amarok	18 143						
						12	Ford Ranger	17 717						

Full size Pick ups

Mid size

Small size

Source : IHS



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Pick up market moved from historical American to Worldwide dominated by the Asian manufacturers

It all starts with
Ford Model T
Runabout in 1925



Today's PUP range is very
wide - from very basic



... to a premium
vehicle fully equipped



Colorale was the first
Renault Pick Up in 1950



Hilux – Leader in 1 Ton Pick up since 1968

8 generation of Toyota Hilux

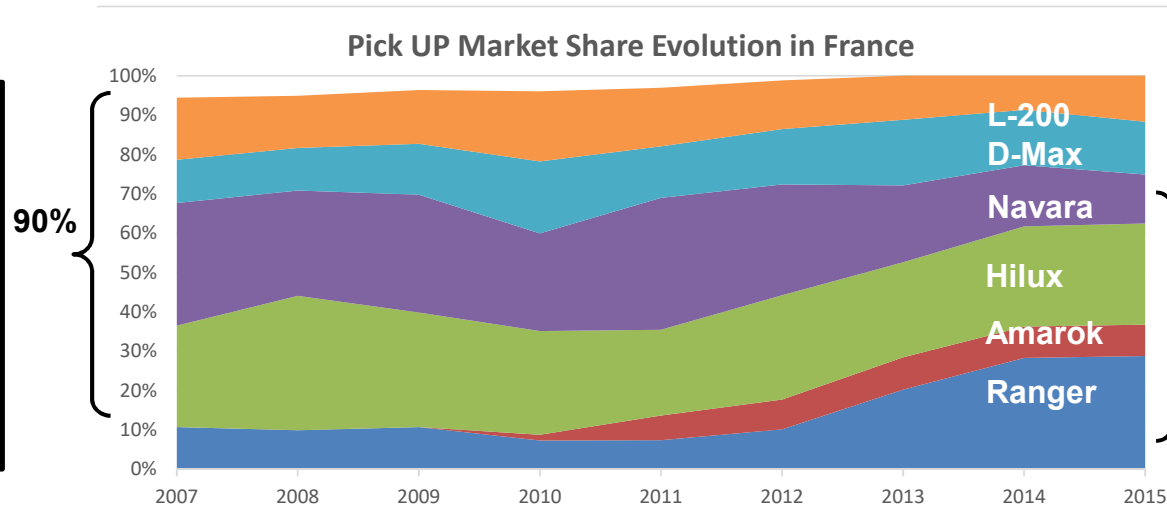


The first generation of Toyota Hilux was based on Renault 4CV and manufactured by Hino Motors



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Recent evolution in Europe



Partnerships in 1 ton Pick up



Example of alliance synergies



Background

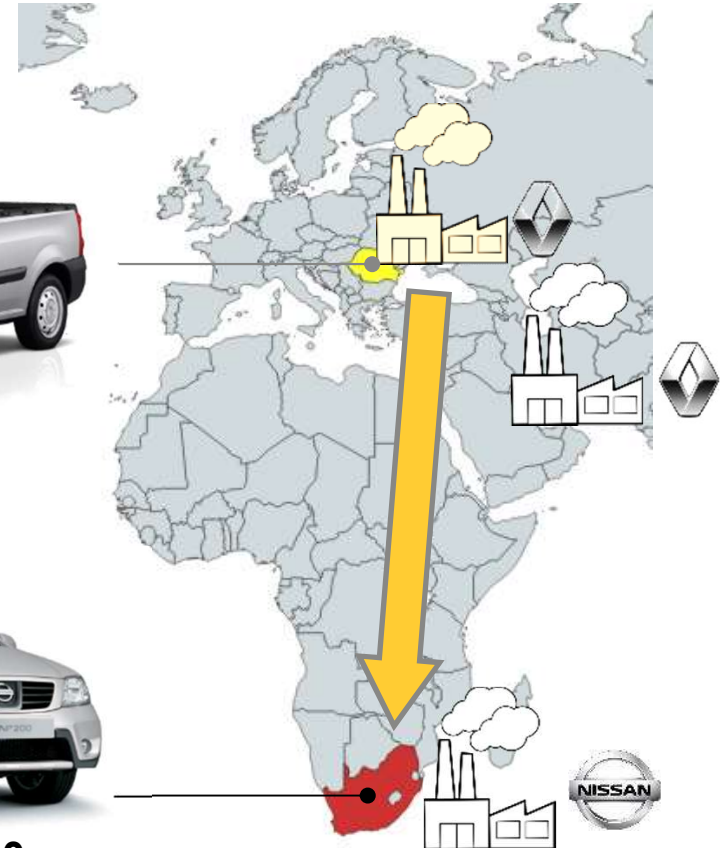
- Launched in 2008 in Romania for Europe market
- Stopped in 2012
- Industrial tools transferred in Nissan's South Africa plant
- NP200 has 50% segment share in South Africa



Logan Pick Up



Nissan NP200



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Product - Pick up range and specific features



Customer & product focus : what is a Pick up?

SMALL PICK UP
ex. Fiat Strada



Payload: 0,5-0,8T

*Car derived pick up
Unibody*

*Engine: < 2L
Diesel and gas L4*

MID SIZE PICK UP
Toyota Hilux



1T

Body on frame

*2,0-3,2L
Diesel and gas L4 L5 V6*

FULL SIZE PICK UP
Ford F-150



1,5T-3T

Body on frame

*4L-6L
Diesel and gas V6 V8*



Pick up – a range of product

Chassis-cabine



Simple Cabine



Extended Cabine



Double Cabine



Pick up – a range of product

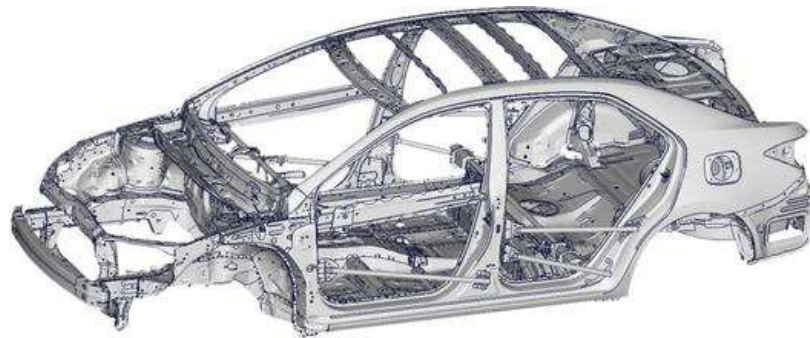
WORK HORSE



LIFE STYLE



Small Pick up Caisse autoporteuse



Light and compact

Mid-size / Full size – chassis-échelle



Capable

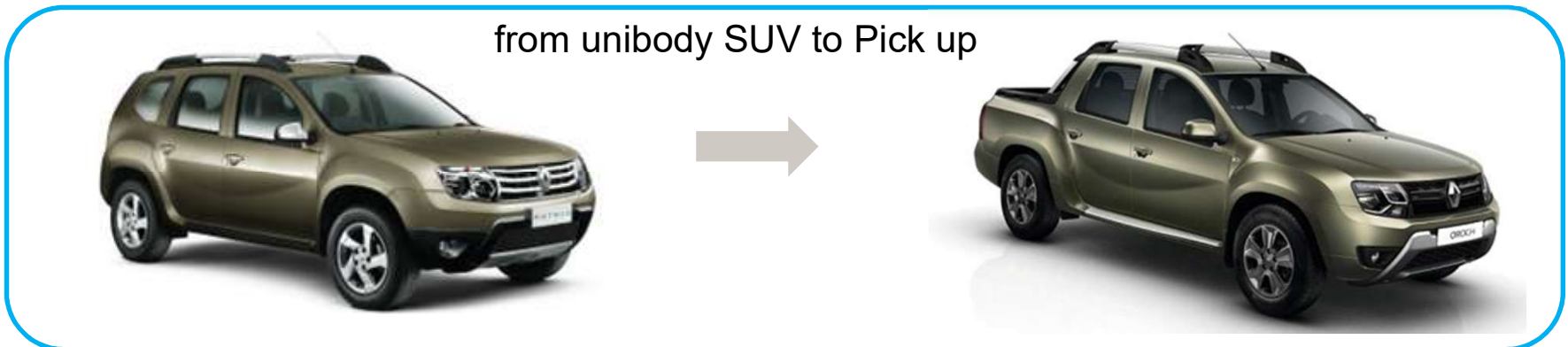


Pick up – a range of product

from Pick up to frame based SUV



from unibody SUV to Pick up



Trends & innovations : lighter and electric



Ford F-150 Hybrid in 2020



| NEWS



www.facebook.com/ford



www.twitter.com/ford

Ford Adding Electrified F-150, Mustang, Transit by 2020 in Major EV Push; Expanded U.S. Plant to Add 700 Jobs to Make EVs, Autonomous Cars

- Ford confirms seven of 13 new global electrified vehicles coming in the next five years, including F-150 Hybrid, Mustang Hybrid and Transit Custom plug-in hybrid



Tesla : un pick-up et un camion 100% électriques bientôt programmés !

PUBLIÉ LE 19 AVRIL 2017 À 17:21 | MIS À JOUR LE 20 AVRIL 2017 À 15:41 | PAR JULIEN JODRY

1K
partages



Elon Musk l'a annoncé lui-même : Tesla lancera bientôt un pick-up et un camion, évidemment 100% électriques.



Trends & innovations : unibody 1T payload

Fiat Toro, unibody 1t, sold from 2016



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Hyundai Creta Pick Up announced for 2018



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Pick up: tailormade range of conversions

- Examples of heavy conversions : Tow trucks , cherry pickers, Aerial bucket, tipper, flatbed, workshops vehicles, Road safety patrol vehicle...



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Bed accessories

Hard Top	Tonneau cover (2 types)	Load carrier	Bedliner (2 types)
			
Bed rail caps	Sliding Tray	Tool Box	Bed Divider
			
Water defense kit (for tailgate)	Metallic Step	Tailgate assist	Guard Frame
			



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Exterior & comfort accessories

Roof bar on rails



Towbar



Bike, ski carrier



Roof box



COMFORT, LIFE ON BOARD, etc.



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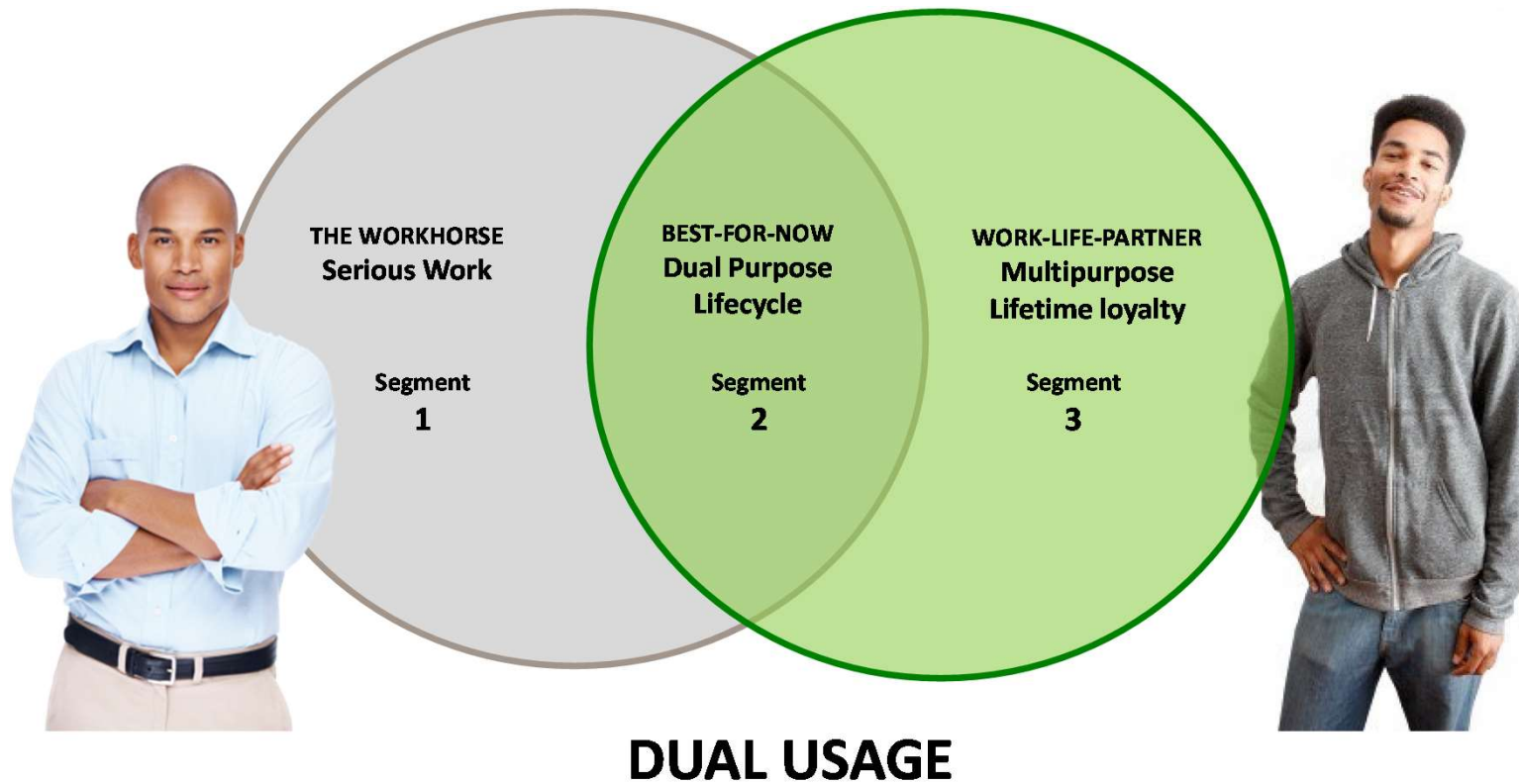
Customers and usages



Who are our customers ?



Who are our customers ?



WHO is Alaskan CUSTOMER ? FROM WORKHORSE TO WORK-LIFE-PARTNER

Workhorse

Primary reason for purchase is **work**, the vehicle plays an essential role in the daily duties.

Usages:

Mainly work in different business areas,
Heavy daily usage,
Taught circumstances,
Off-road usages



Work – Life – Partner

Primary reason is still **work** but dual usages are frequent.

Usages:

Work varied depending on job,
Both heavy and light loading,
Large scale of private lifestyle usages:
towing/ house maintenance/
transporting family/hobbies/
shopping/ holidays



A usage can be very intensive (1/2)



Common use of
3t Payload instead of
1t allowed



That's why frame body
and leaf suspensions
are appreciated

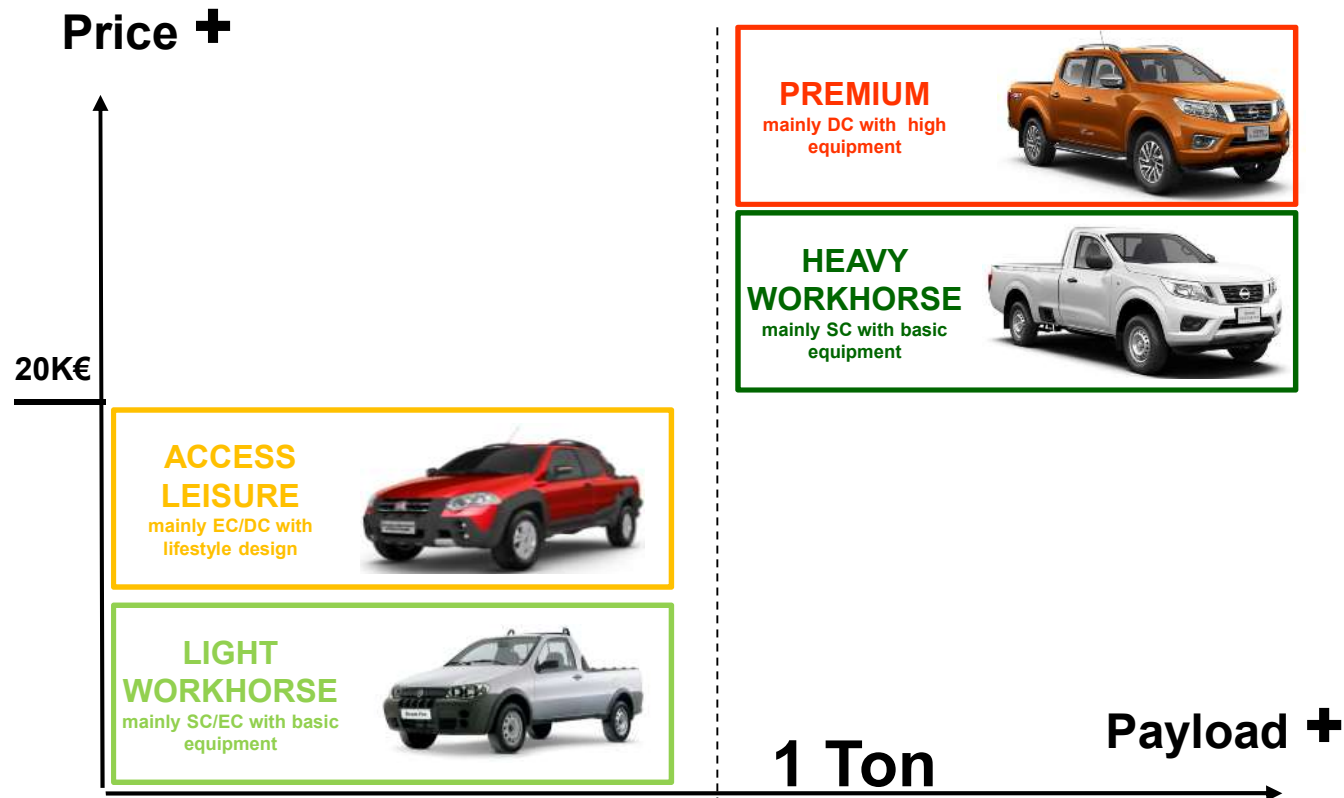


A usage can be very intensive (1/2)

Towing 7,5t instead of 3t !



Leisure and workhorse in all segments



Why does customer prefer Pick up ?



What is an ideal MSPU?



It's a capable, credible tool, to be used, to get dirty.

Capable



- ✓ Accommodates all types of cargo in an open bed (i.e., camping equipment, bikes, skis, mulch, furniture)
- ✓ Handles all weather and terrain

Versatile



- ✓ Complete capability in a manageable size, making it easy to maneuver, park, fit in garage, and drive into the city

Authentic



- ✓ It looks like a true truck – not a hybrid truck
- ✓ It will be used like a true truck – not for projecting an image



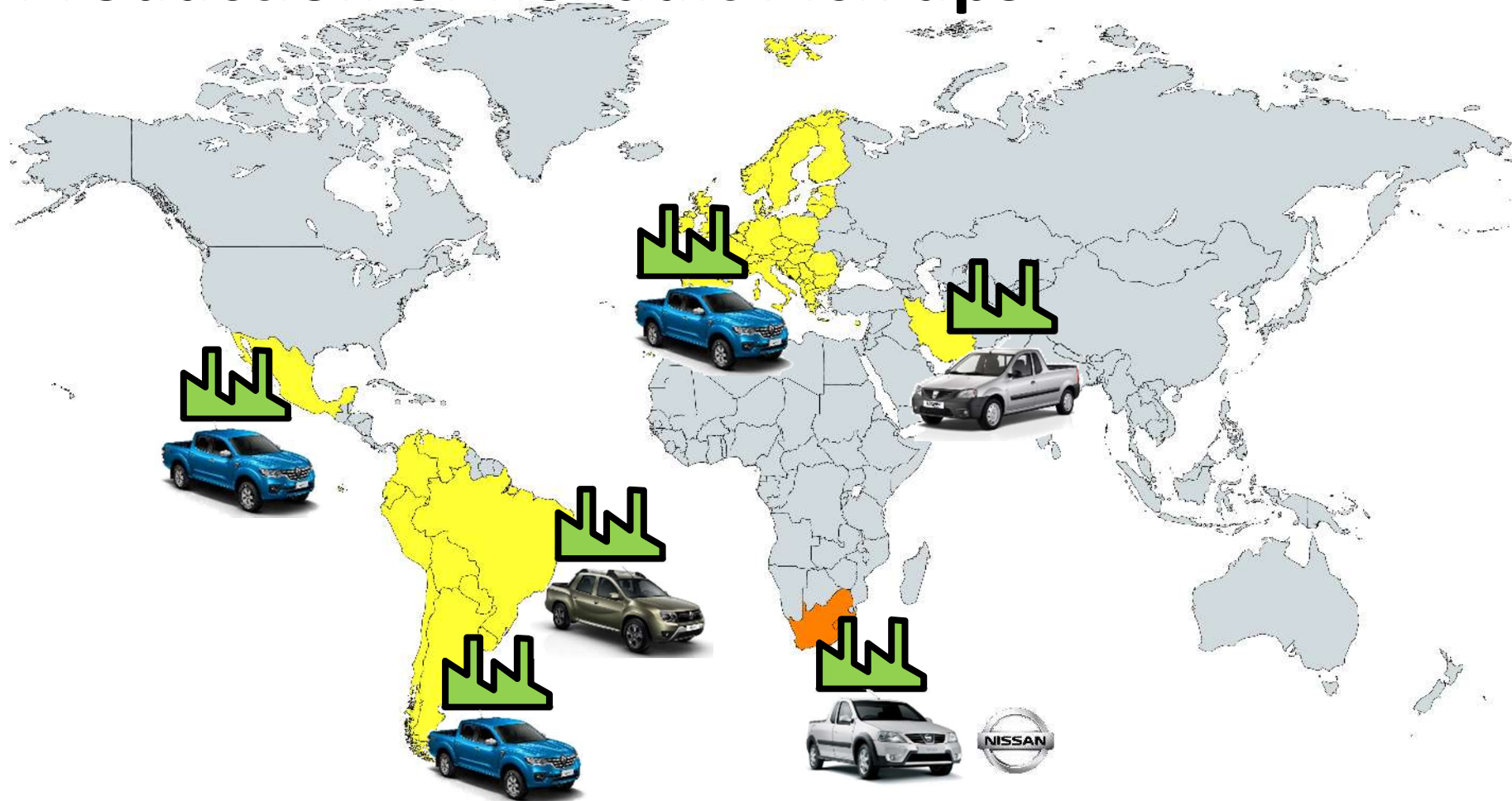
Why Renault is entering Pick up market ?

Renault strategy for Pick Up market

- Market coverage (introduce / reinforce in markets with strong Pick up exposition). Pick Up segment accounts for 42% of world LCV sales.
- Model coverage (in developing Pick up markets : complete the model range with Pick up opportunity)
- Alliance synergies



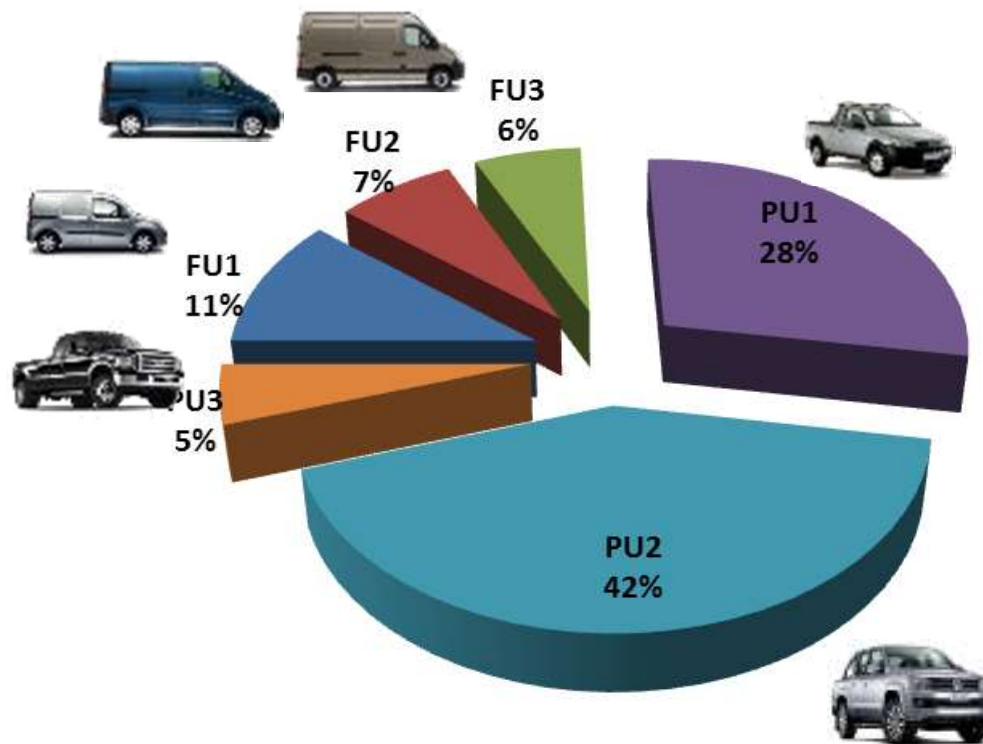
Production of Renault Pick ups



RENAULT DUSTER OROCH



South America 1,2 M units LCV Market



is mainly Pick Up



Main competitor

FIAT STRADA



Duster Oroch, a new concept, creating a new segment

PUP 1



Fiat Strada



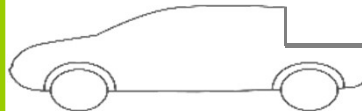
VW Saveiro



Chevrolet
Montana

PUP 1.5

Renault
Duster
Oroch



Double Cabin
Duster carry-
over
Unibody

PUP 2



Chevrolet S10



Toyota Hilux



Mitsubishi L200



Ford Ranger



Nissan Frontier



VW Amarok



Customer target : constrained fine-looking pick-up seekers

WHO ARE THEY?

Who are they?

- Customers with both private and professional use
- Young adults (from 28 to 40 years old) mainly single or recently married with children
- Own Pick Up 1 (Strada, Montana) and old Chevrolet S10

Usage

- **Moderate use** of vehicle : sometimes load **big volumes** but **do not overload**
- Also traveling for **leisure** and pleasure
- Daily usage on roads and motorways
- For a minority: non-paved roads but drive with precarious ground conditions

RELATION TO CAR

Main purchase criteria

- 1 - Price
- 2 - Design
- 3 - Brand

Car attitude

- They want a new vehicle
- They are loyal to the Pick Up segment
- Car is symbol of social growth, status and life style
- They would like a Double Cab Pup 2 but can't afford it



MARKET POSITIONING

The unique and tough « **Sport Utility** Pick-up »

USP

A SUV INHERITANCE

A REAL
DOUBLE CABIN
[4doors/5seats]

BSP

RIGHT BALANCE
BETWEEN CABIN
AND BED

PRACTICAL
ACCESSORIES

A RELIABLE
FELLOW TRAVELLER

Extends the limits of Pick-Up territory...



Attractive Design
Real 4 doors with windows
Spacious interior
Big bed

Intelligent range of accessories



Intelligent range of accessories



*Exemplo de utilização



Intelligent range of accessories



Nova Renault DUSTER OROCH

#PickUpYourLife



RENAULT ALASKAN



Alaskan in few words



A tailor made offer based on a muscular Pick up : exterior design

Muscular, Robust, Comfortable, Powerful , Ingenious



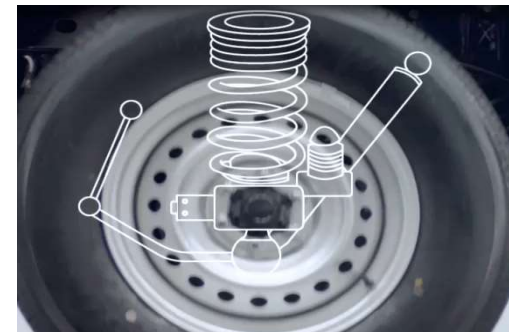
Robust & comfortable

New 5-link rear suspension



CUSTOMER BENEFIT:

- ▶ Combines excellent ride and handling with premium comfort for all passengers, with no compromises in off-road capabilities or strength
- ▶ Better filtration capacity => better acoustic and less vibration rise of the road
- ▶ Good stroke and damping in wavy road
- ▶ High lateral rigidity and light weight suspension
- ▶ Gives high stability by steer properties
- ▶ Best driving experience



Robust & comfortable

A SPACIOUS, COMFORTABLE CABIN



CUSTOMER BENEFITS:

- ▶ Seats are adjustable with lumbar support to reduce fatigue on long journeys
- ▶ Heated seats for more comfort



Unexpected comfort of a passenger car

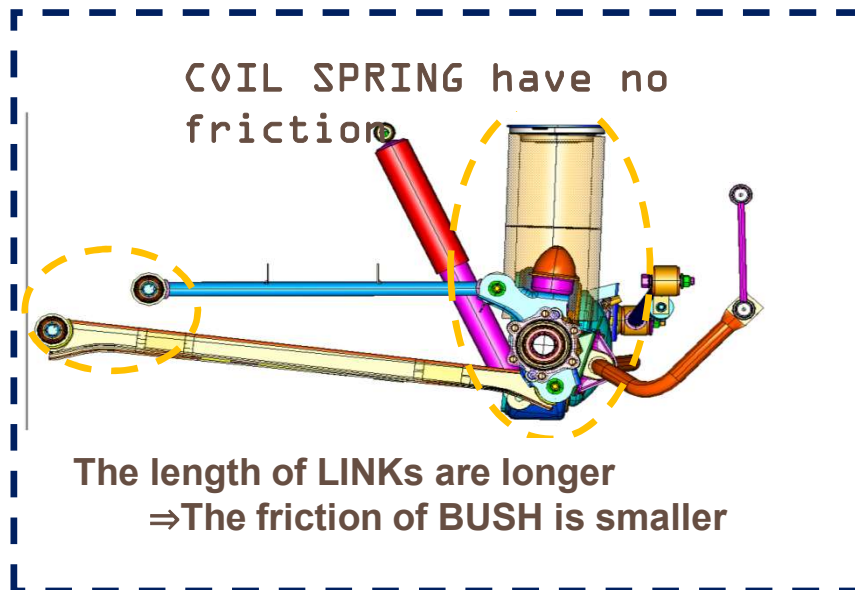
- ▶ Zero gravity seats with lumbar support and body pressure distribution on seating surface (Inspired from NASA seats)
- ▶ 4, 6 or 8 way adjustability seats
- ▶ Manual or power with leather seats & Heating function



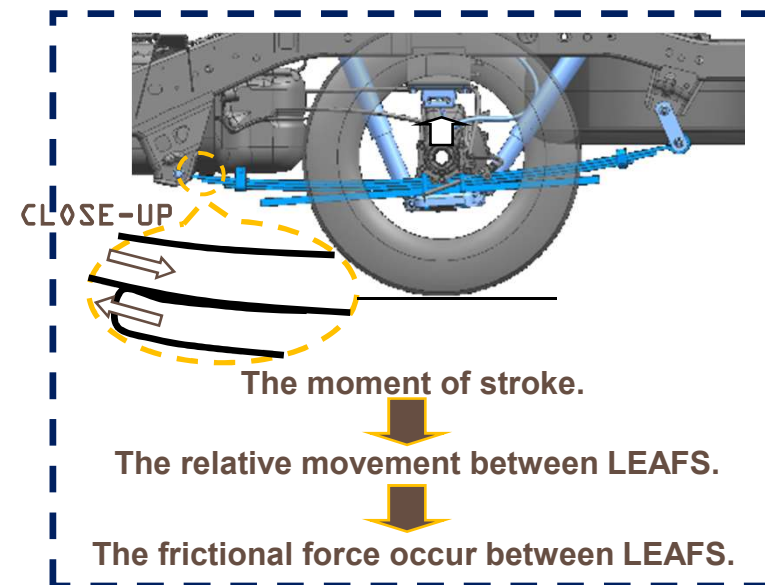
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Road comfort : 5-link rear suspension vs leaf spring

5-LINK Suspension



LEAF Suspension



Powerful & ingenious

DIESEL ENGINE RENAULT M9T 2.3 litre dCi, a simple four-cylinder twin-turbo diesel engine



CUSTOMER BENEFITS:

- ▶ Expected best in class ratio fuel consumption vs power/ torque
- ▶ Outstanding acceleration with benchmark fuel economy and CO2 emissions

160HP

190HP

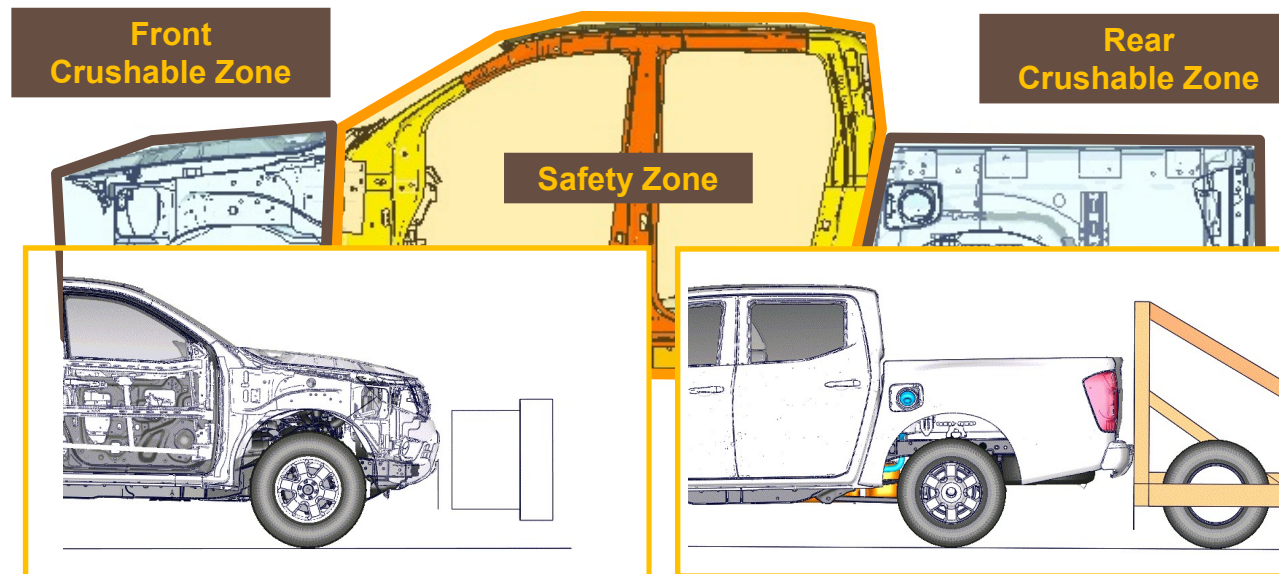
RELIABLE AND PERFORMANT

- ▶ Proven features on new Master
- ▶ Expected best in class consumption
- ▶ CO2 improvement by downsizing
- ▶ Twin-turbo technology for performance at low and higher revs
- ▶ Quiet and responsive engine
- ▶ Designed specially for commercial vehicles



Technical features – safety

When the accident is unavoidable, the safety zone minimize the risk of occupant injuries in case of accidents.



**Thank you
for your attention**



PRODUCT PLANNING



**Thank you
for your attention**

