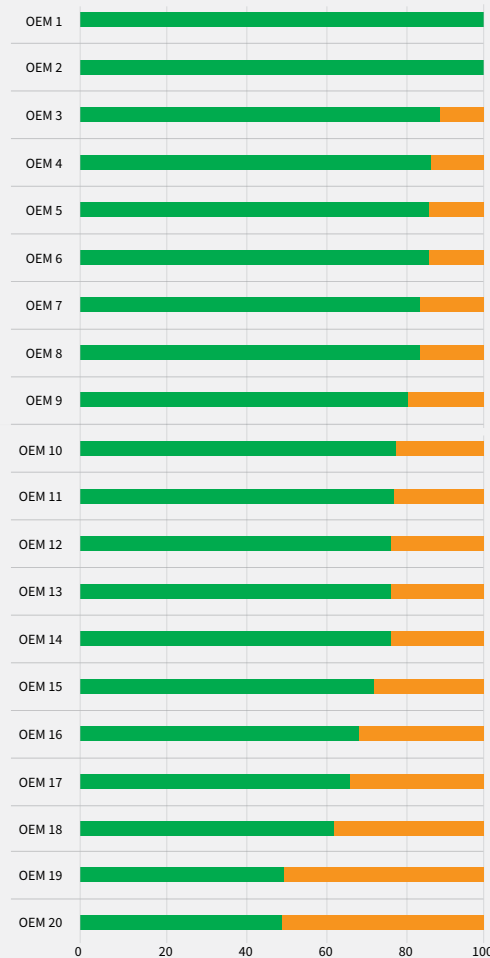




Will your vehicle fleet be compliant?

Many OEMs will still be challenged to meet future emissions regulations (US Passenger Car Fleet)



18 out of 20

are facing a 2025 CAFE compliance challenge

Compliant Missing to Compliant

\$400 Billion

Estimated global automotive R&D spend on technology solutions for light-duty vehicle fuel efficiency, between 2015 and 2020.

Source: IHS Markit research based upon various independent R&D forecasts for the entire sector, with an assumed average 70% of total R&D being allocated to environmental regulatory compliance and electrification combined.

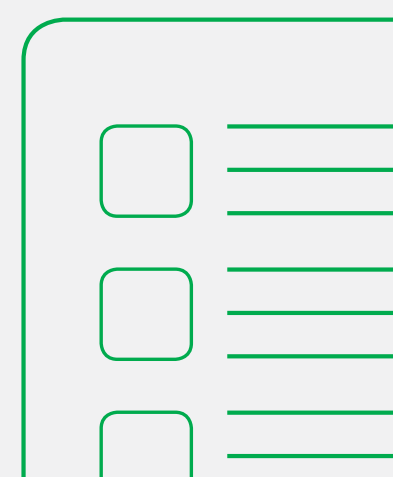
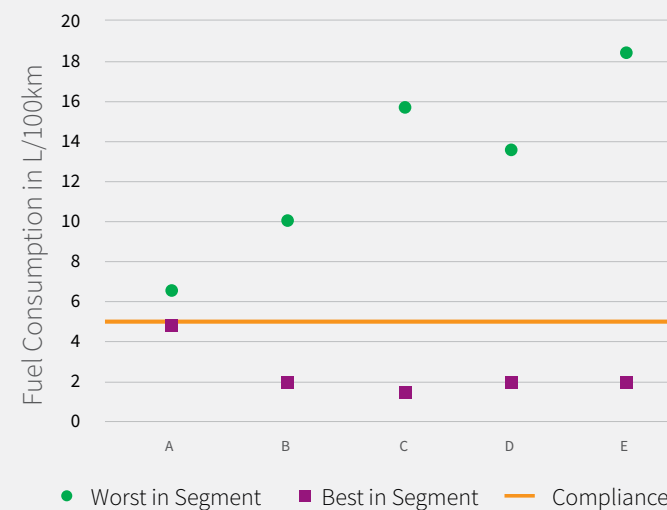
24g/km average reduction in CO<sub>2</sub>

across the Top 10 (by CO<sub>2</sub> reduction) EU28 passenger car fleets (between 2015 and 2020)



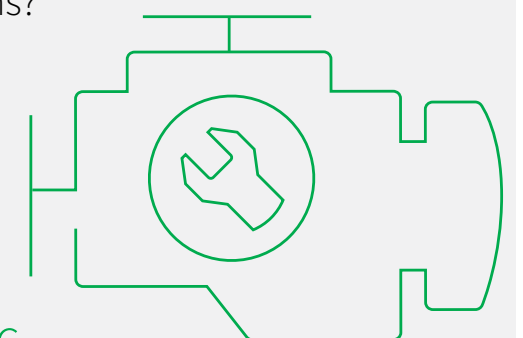
Each segment tells a different compliance story

China Passenger Car Fleet in 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.ihsmarkit.com/vpac](http://www.ihsmarkit.com/vpac).



All figures are subject to change as part of the regular forecasting process.