NISSAN MOTOR COMPANY

Nissan Motor's Global Strategy & Two Vision ZERO

November 18, 2013

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www.nissan-global.com

NISSAN POWER 88

POWER

Brand & sales power

FY13 Outlook

8

Global market share by FY16 (%)

6.4%

8

Sustainable COP (%)

5.4%

Global Strategy

Offensive Strategy

Emerging markets

Entry markets

DATSUN

启辰 VENUCIA

Premium market

INFINITI

Leadership Strategy

Zero Emission

Autonomous driving

Partnership Strategy

RENAULT NISSAN

DAIMLER

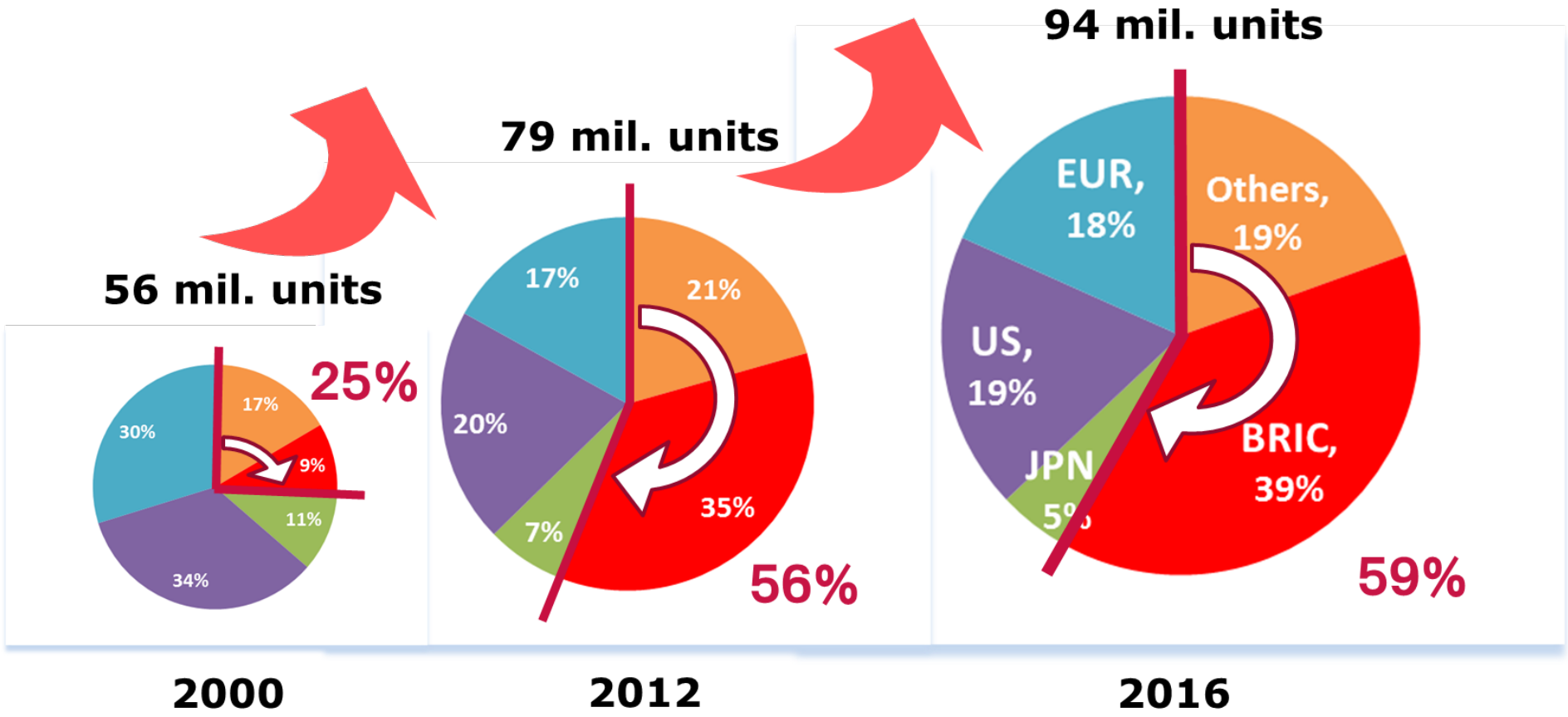
DONG FENG

MITSUBISHI MOTORS

ASHOK LEYLAND

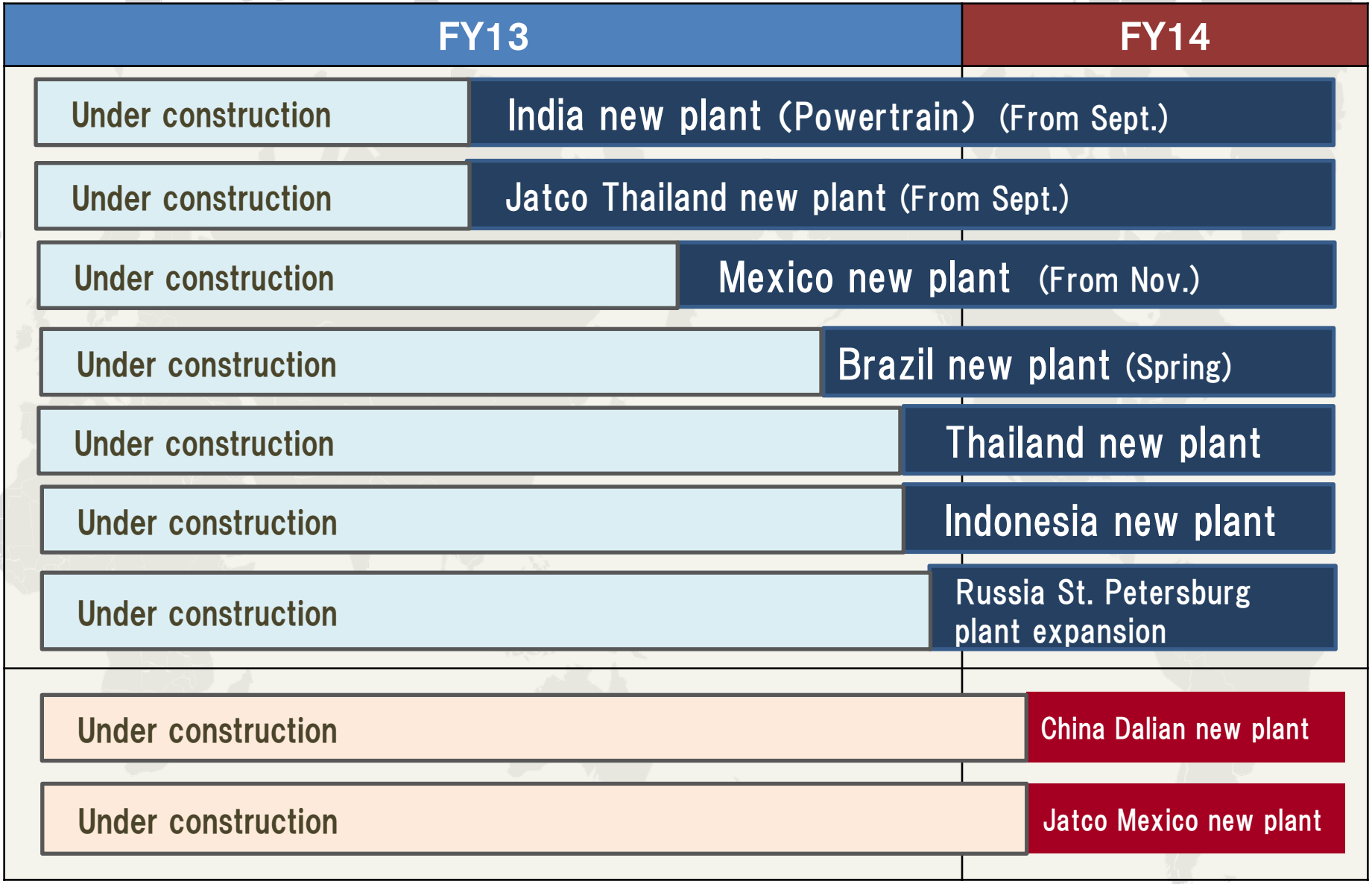
AVTOVAZ

Emerging Countries Leading the Growth



Source: Nissan Motor

New plant investments



New Car Source of Sales
(mature markets vs. growth markets)

Structure of New Car Demand

Mature Market

Replacement

High Growth Market

New

NISSAN

DATSUN

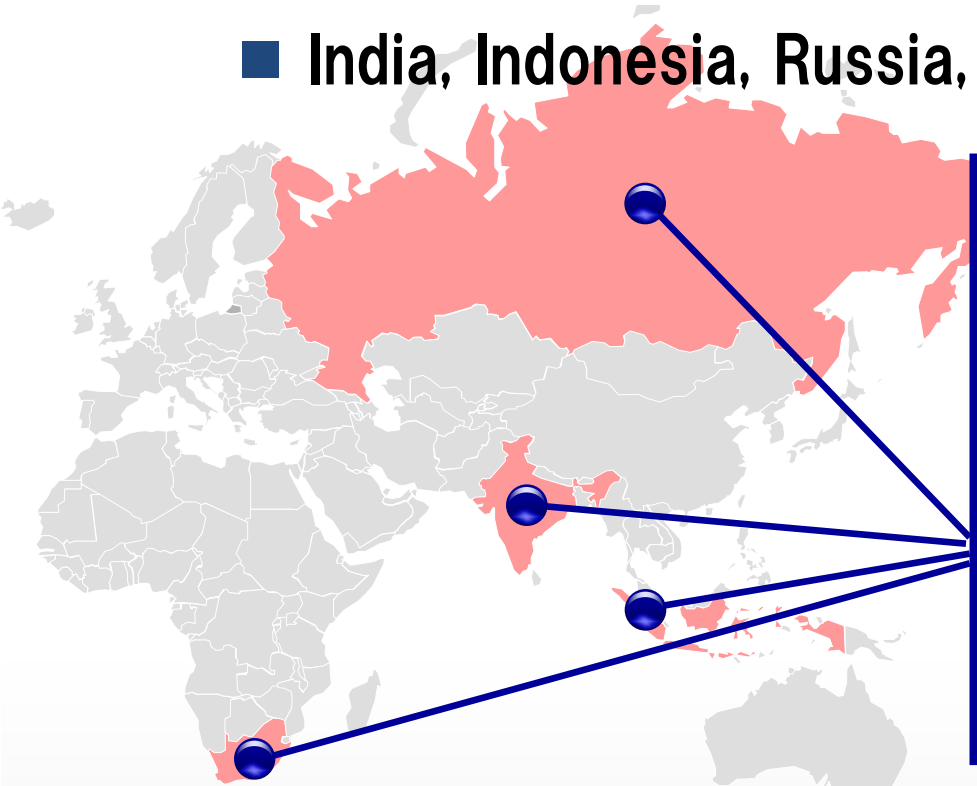
Require products / services that cater to the needs of first-time buyers

Typical scene in an emerging market

Datsun brand offers new values

Introduction of Datsun

- India, Indonesia, Russia, & South Africa in 2014

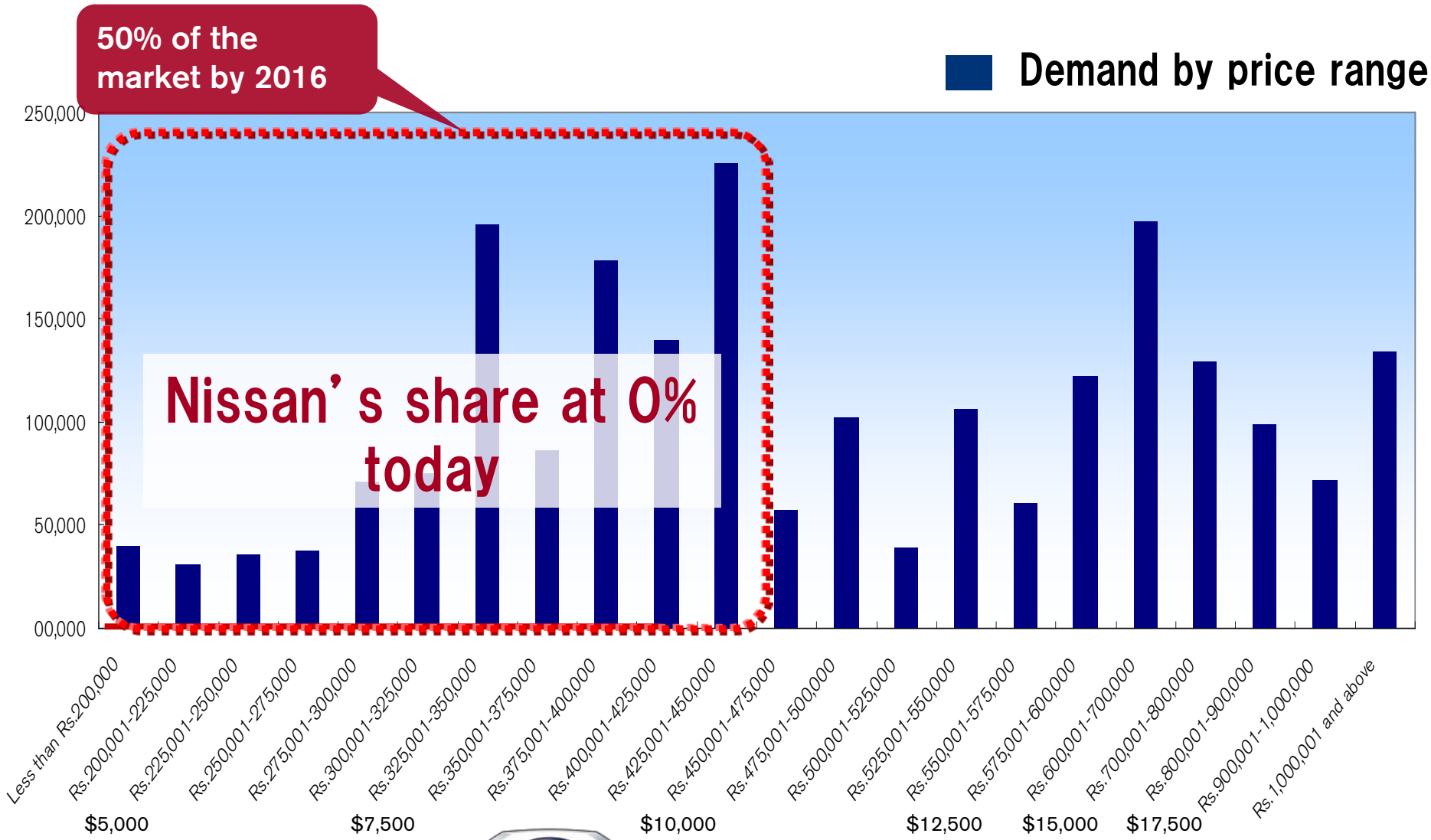


Datsun's target customers

Risers

Dream
Access
Trust

Market Needs & Opportunities in India



1USD=45.7 INR

DATSUN

Progress & Goal of Infiniti Business

Premium Market Analysis

Premium brands account for 11% of total light-vehicle sales.

11%

But represent 50% of industry profits

50%

Building Stronger Infiniti Business

Relocation of HQ to Hong Kong

Grand opening ceremony held on May 2012

Currently IML

15 nationalities

Active Recruitment of Dedicated Personnel

Develop Asia's first premium brand with a team of professionals and experts

Johan

SVP of NML in charge of global Infiniti since last July.
Served as president of Audi's American operation

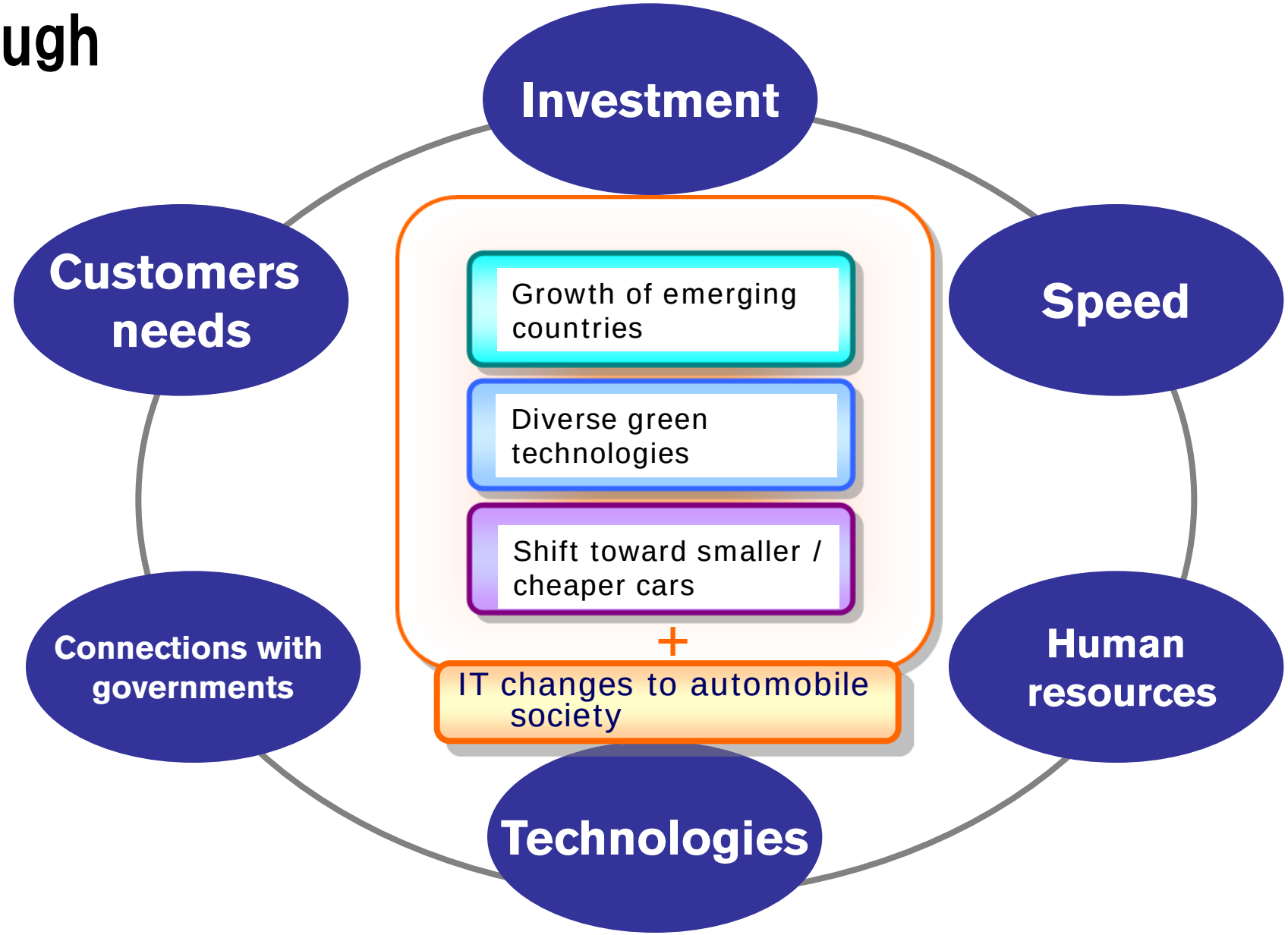
Michael

VP of Infiniti Americas since this September.
Served as COO of Porsche Cars North America

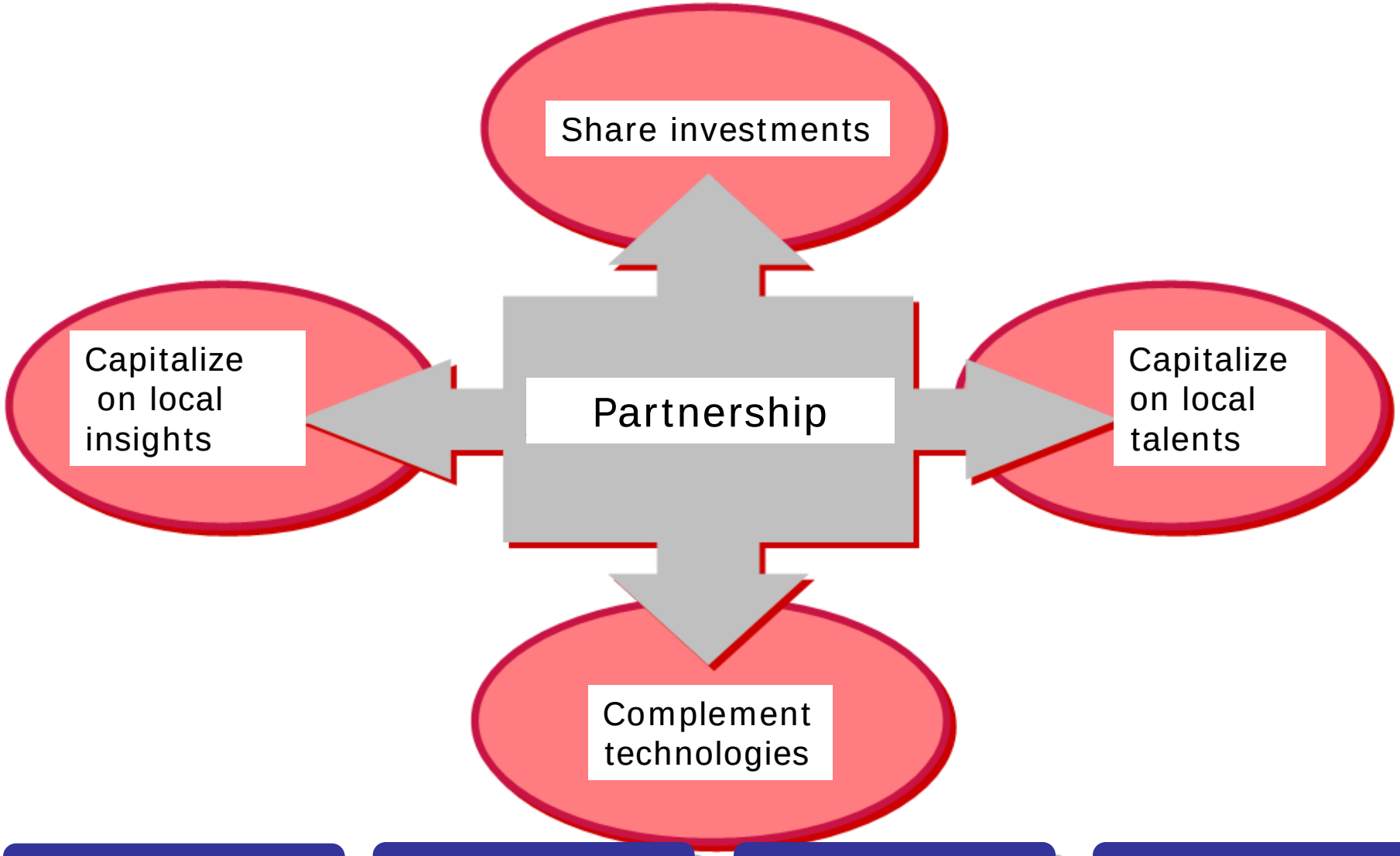
Daniel

Managing Director of Infiniti China since this May
Served as
Previous vice president of BMW's joint venture in China
Speaks fluent Chinese

Adapting to the changing environment alone is tough



Capitalize on partnerships and local resources



Complementarity | Synergy | Alternative | Offset

Partnerships created so far

RENAULT NISSAN

RENAULT

DAIMLER

AVTOVAZ

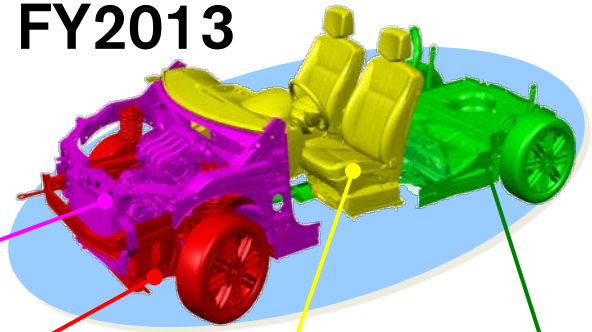
DONG FENG

ASHOK LEYLAND

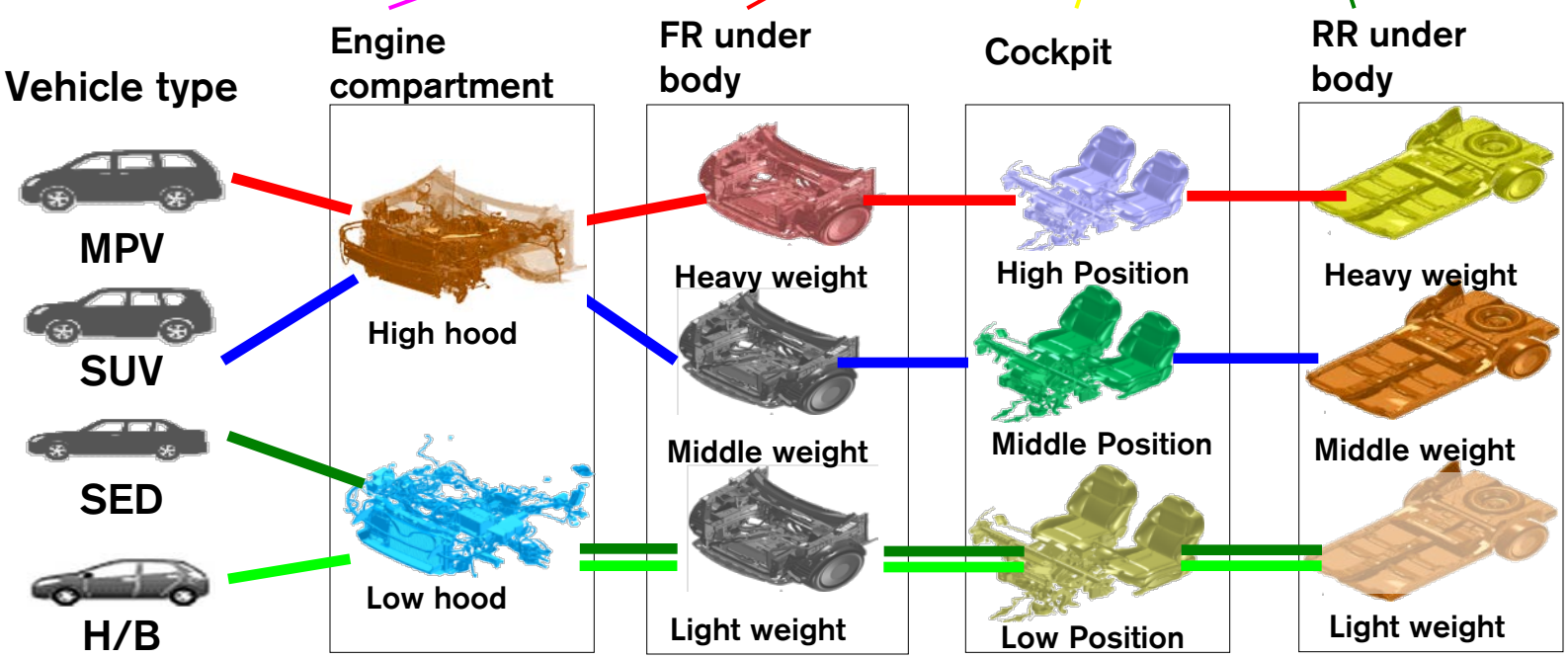
MITSUBISHI MOTORS

Case①:Renault Nissan Alliance Common Module Family

Applied from Rogue / X-Trail in FY2013



Electrical & Electronics architecture



Case②: Partnership Strategy with Daimler

- Infiniti Q50
  Diesel engine essential for Europe and downsizing turbo

- Joint production of 4-cylinder gasoline engine in Tennessee, U.S. starting from mid-2014. Applied to Mercedes Benz C Class & Infiniti models

- Infiniti Q30
  adopt some components of Daimler

Leadership Strategy

Preparations to accomplish Nissan Power 88 hit the climax in FY2013, the end of the first half of the plan. Investments will bear fruits going forward.

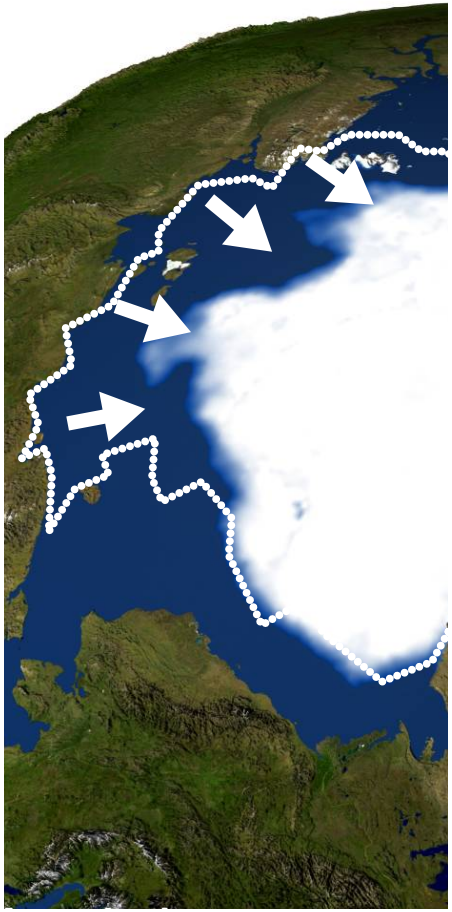
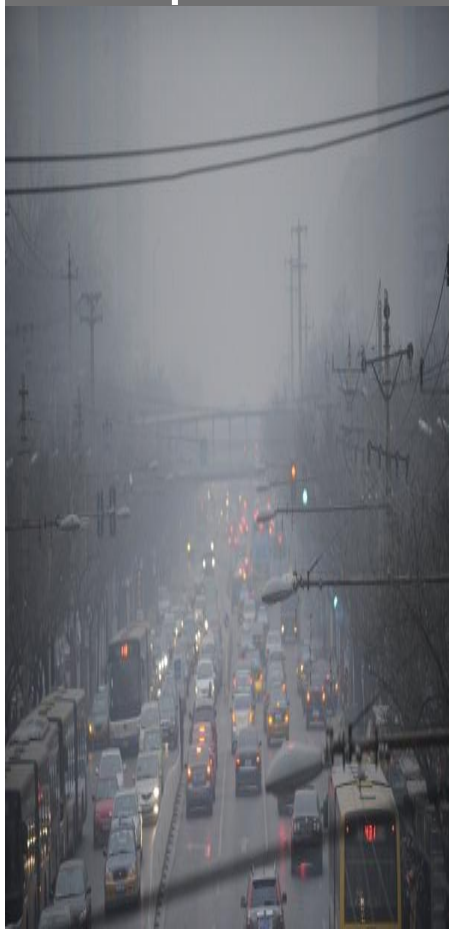
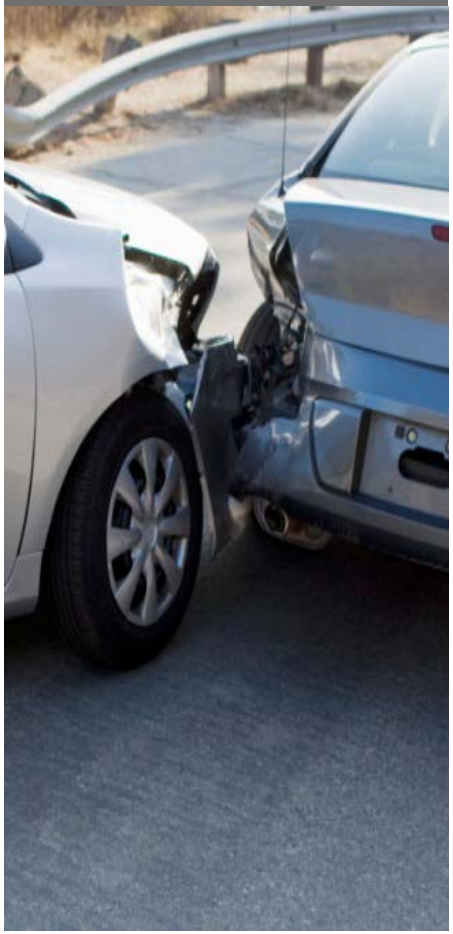
+

At the same time, Nissan is pursuing sustainable mobility under the vision and leadership strategy.

Challenges by Nissan

Challenges by Nissan

Challenges to Develop Sustainable Mobility

Energy	Global warming	Air pollution	Accidents
			
Fossil fuels	**Emission**		**Safety**

Vision : 2 ZERO

Energy	Global warming	Air pollution	Accidents

Zero emission

Zero fatality

2 Approaches of Leadership Strategy

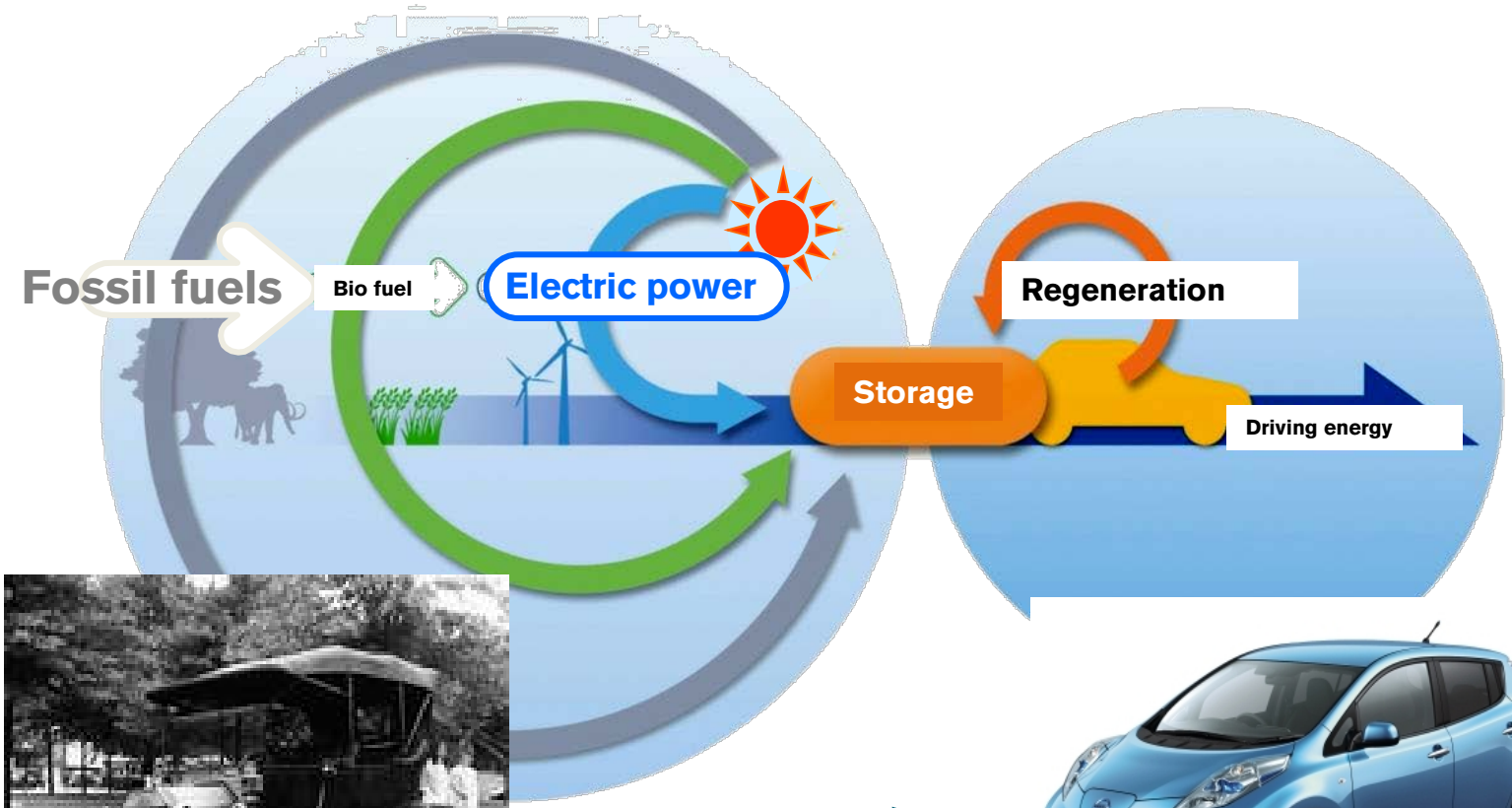
Energy | Global warming | Air pollution | Accidents

Electrification

Vehicle Intelligence

Electrification for Zero emission

Shift from fossil fuel-powered cars to cars powered by renewable energy



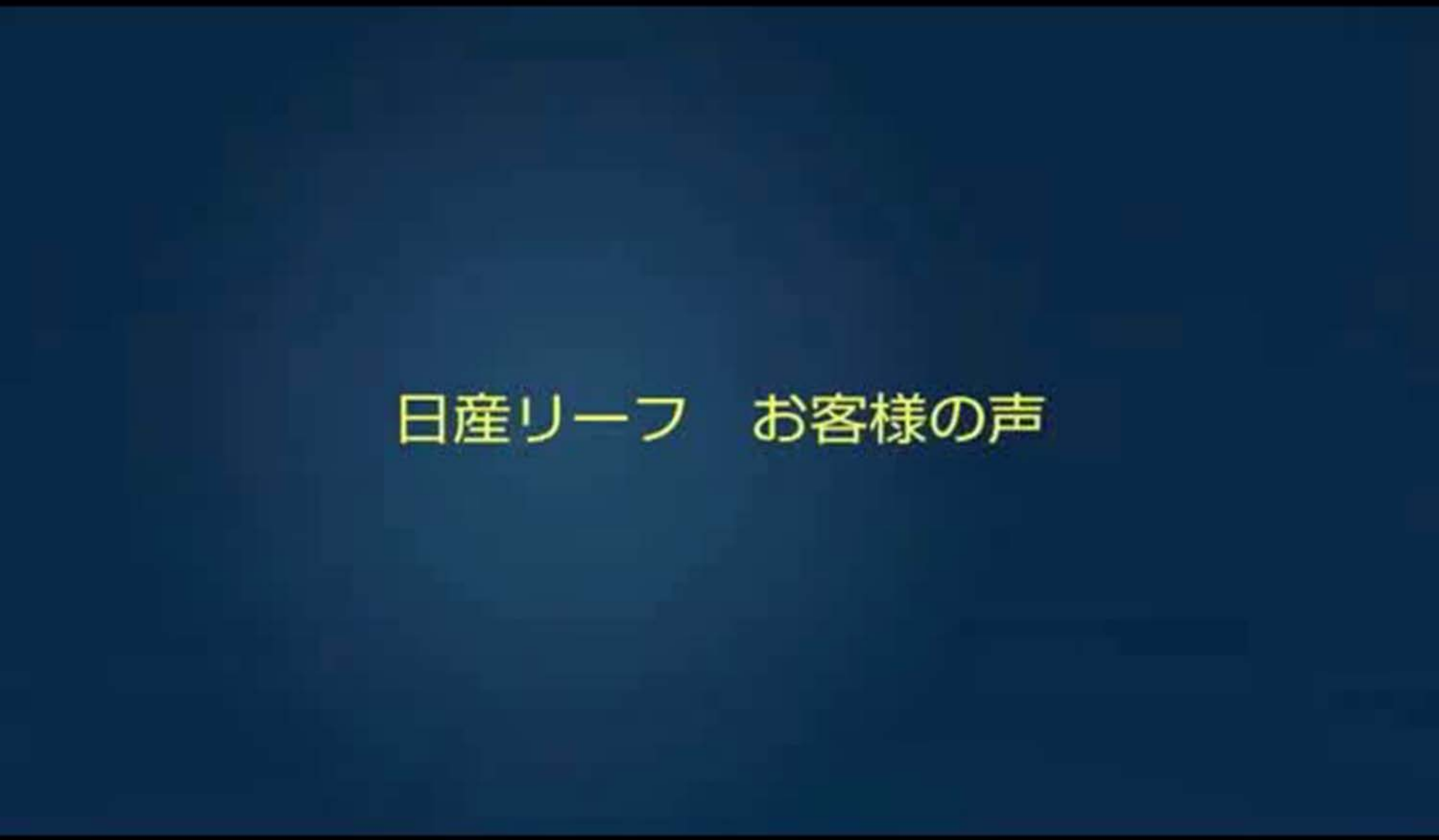
Ford Model T of 1908

Electric Vehicle

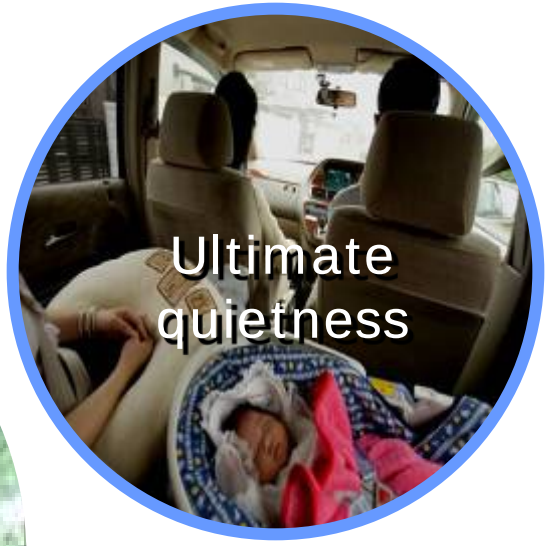
100% EV Nissan LEAF

- **Launched in December 2010**

Nissan LEAF Users' Voice



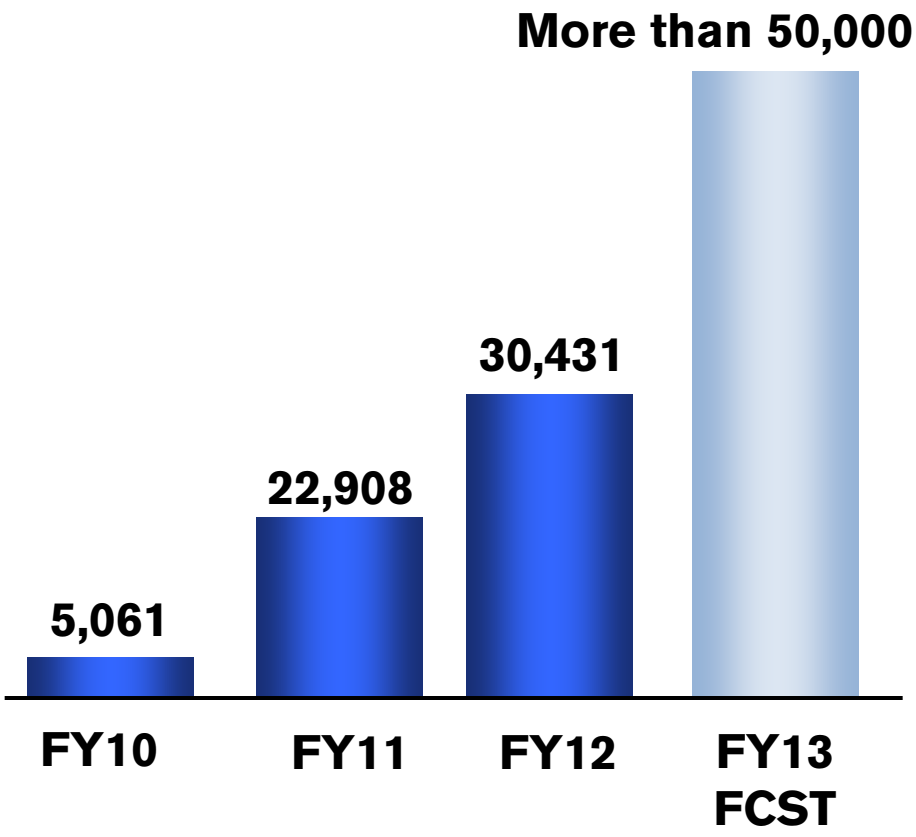
Compelling Attributes of EV



Aggregate Global Sales of Approx.87,000 units

(as of October 2013)

History of Nissan LEAF Sales Volume



JPN

US

EUR

Kanagawa Prefecture

Nissan LEAF Owners' Event in San Francisco

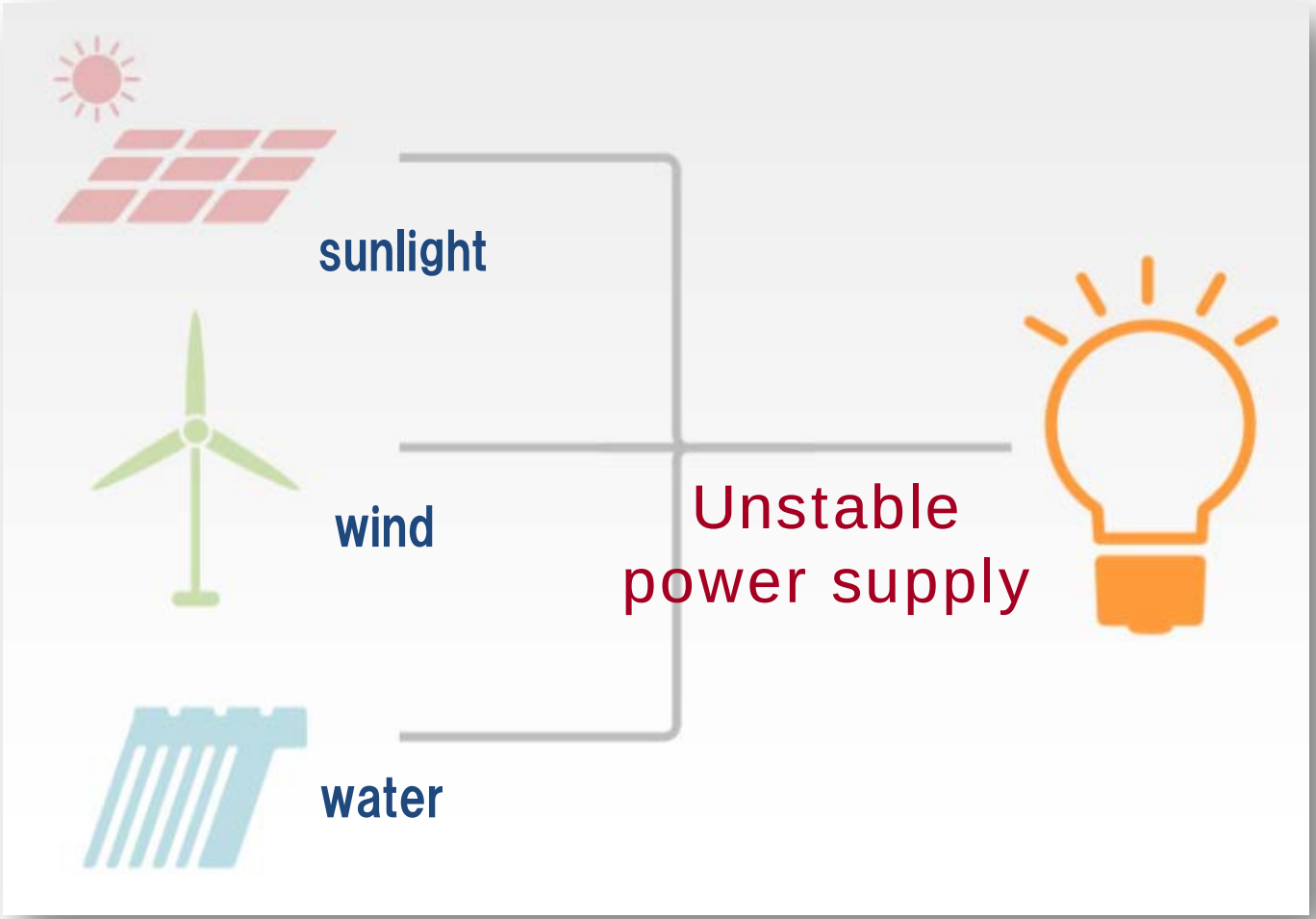
Switch EV Project in U.K.

FAQ

No matter how much you boost the number of eco-friendly EV, wouldn't the issue remain unsolved as long as the power is generated by fossil fuels such as oil and coal?

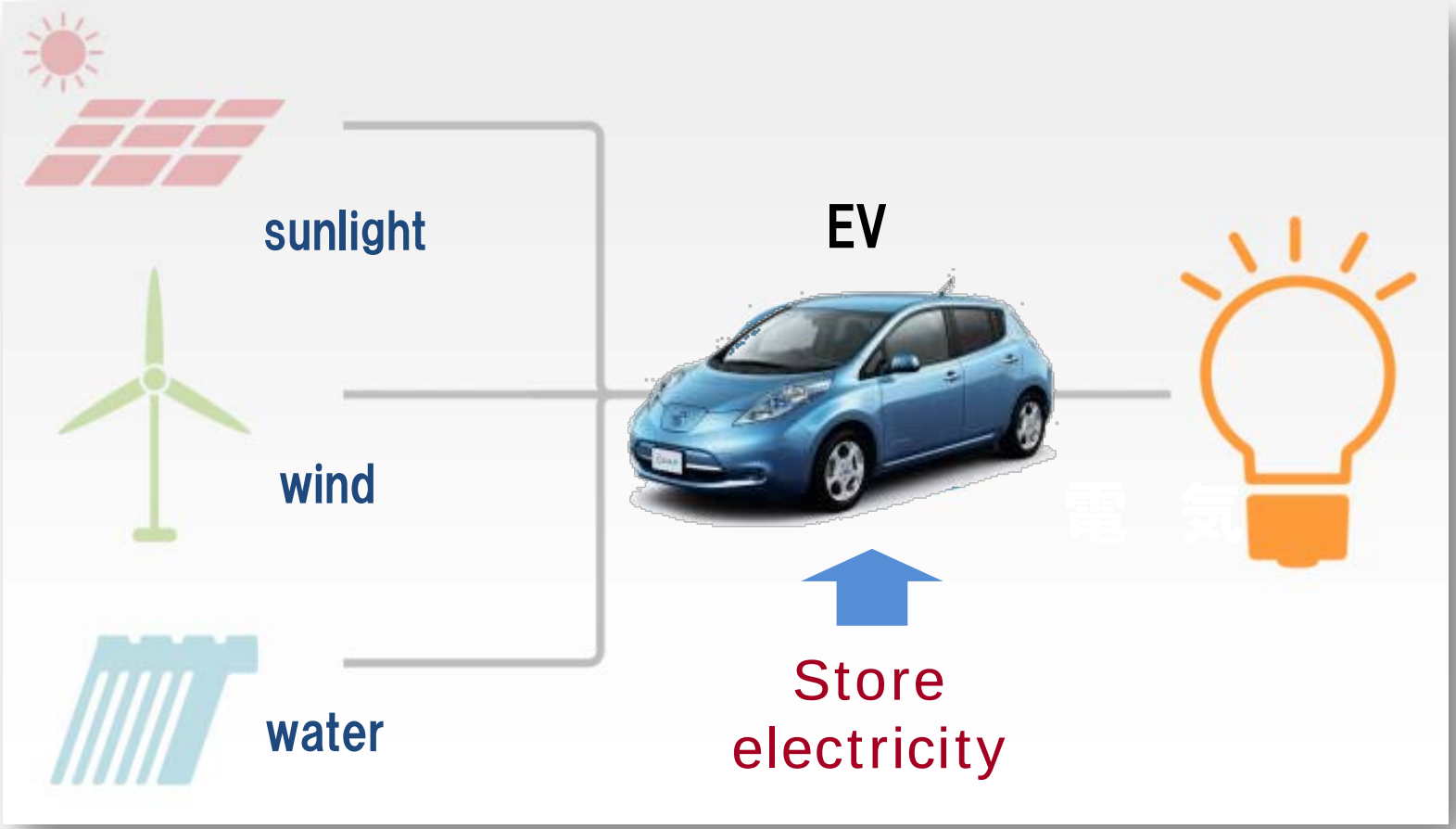
Adoption of renewable energy is key

However, power generated by natural energy is unstable.
It is a challenge to supply at need.

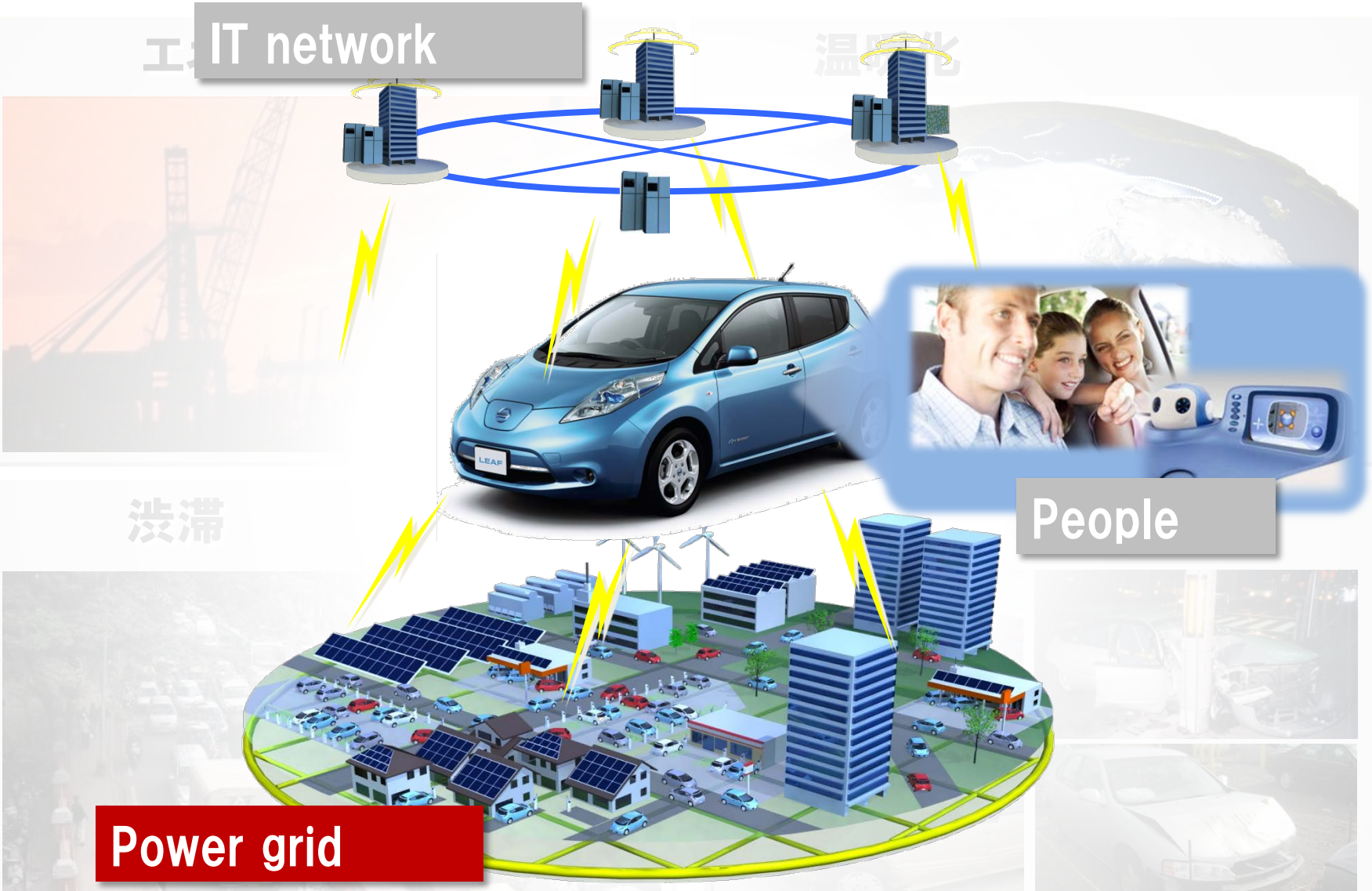


EV for Energy Storage

Using EV as energy storage enables practical use of renewable energy.



Connect with power grid



Power Storage Capacity

EV Battery Capacity

Power Consumption

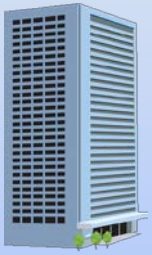
1

24 kWh

Average Household
10 kWh/day

400

Approx.10 MWh



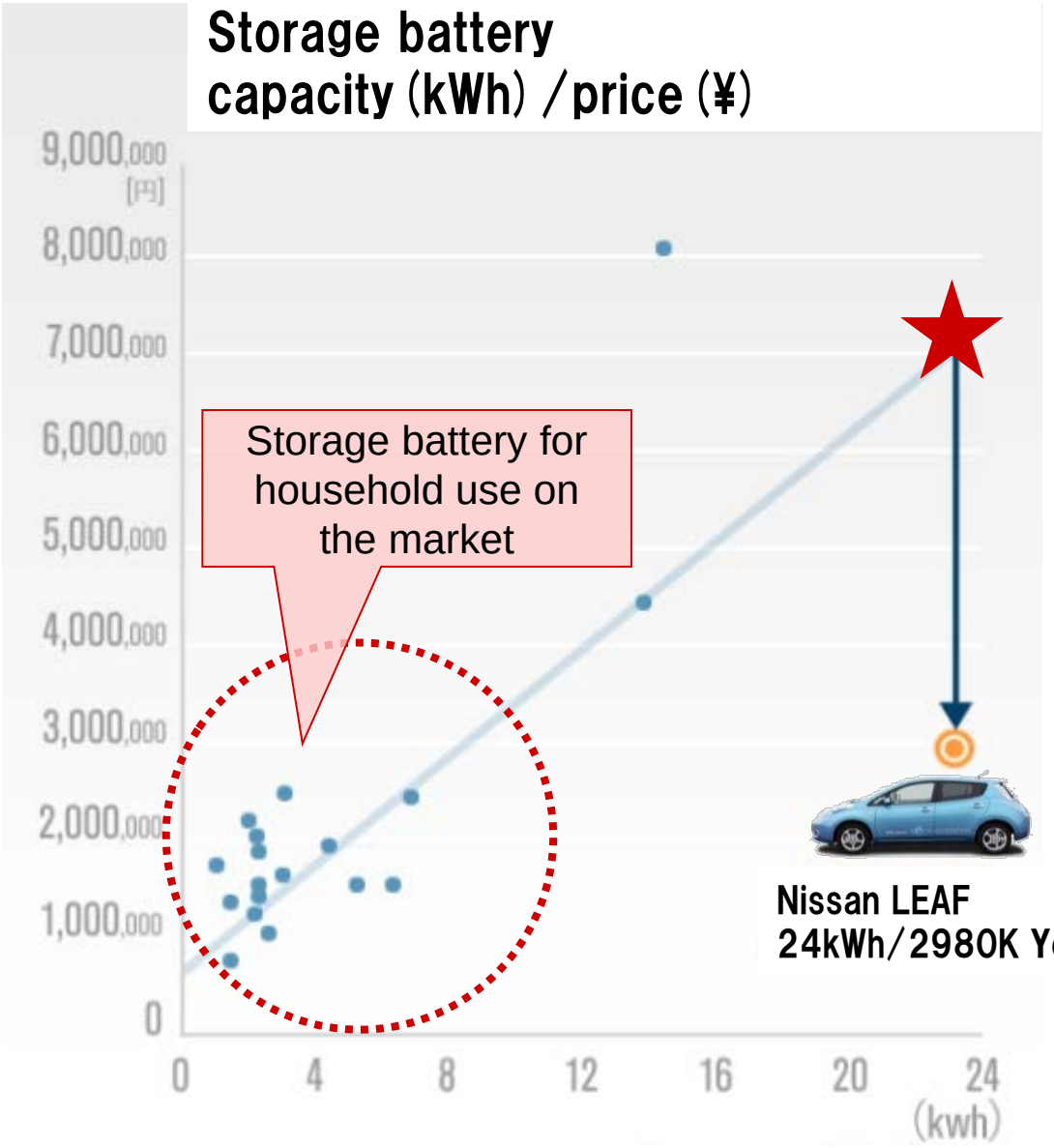
Nissan GHQ
10MWh/day

22,000

Approx.530 MWh

Nishi-ku, Yokohama
（53,000 households)
530MWh/day

Nissan LEAF's Value as Storage Battery



LEAF has ¥7 million value as storage battery (excluding vehicle value)

Power supply capacity of a LEAF (24KWh)

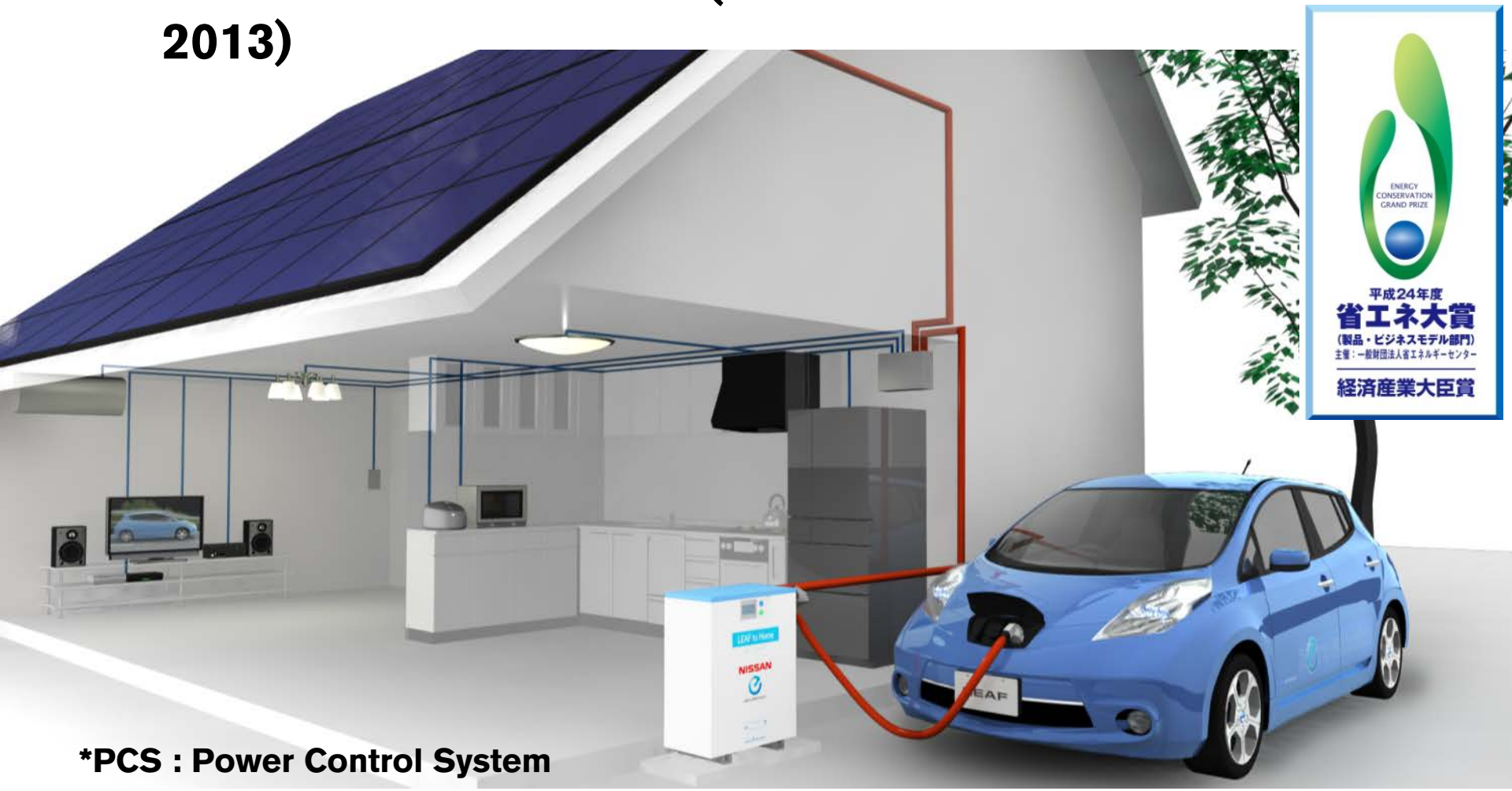
For about 160 Days

For about 29 Days

For about 10 Days

LEAF to HOME

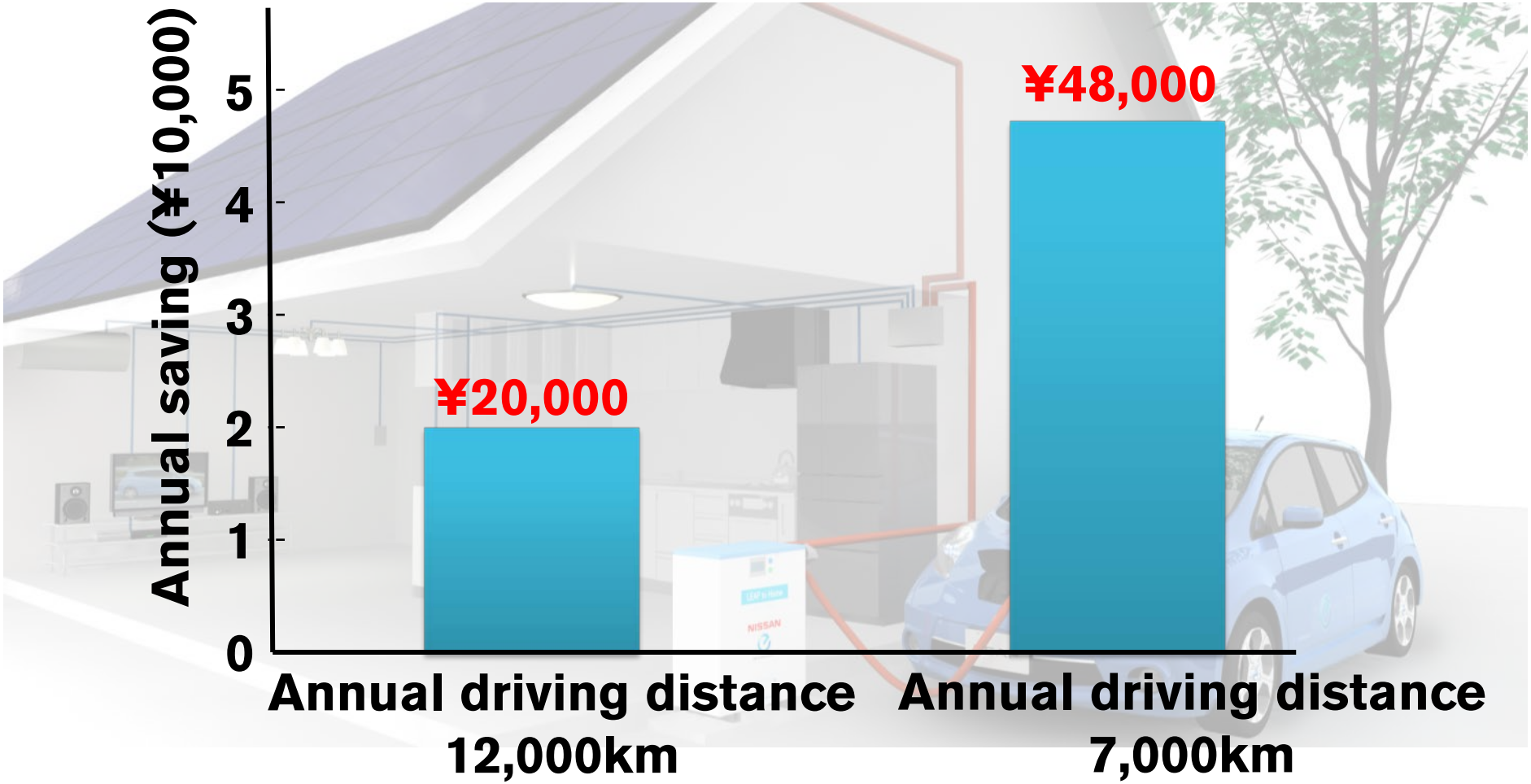
- 2-way energy management by PCS*
- Sold about 2000 units (as of the end of October 2013)



*PCS : Power Control System

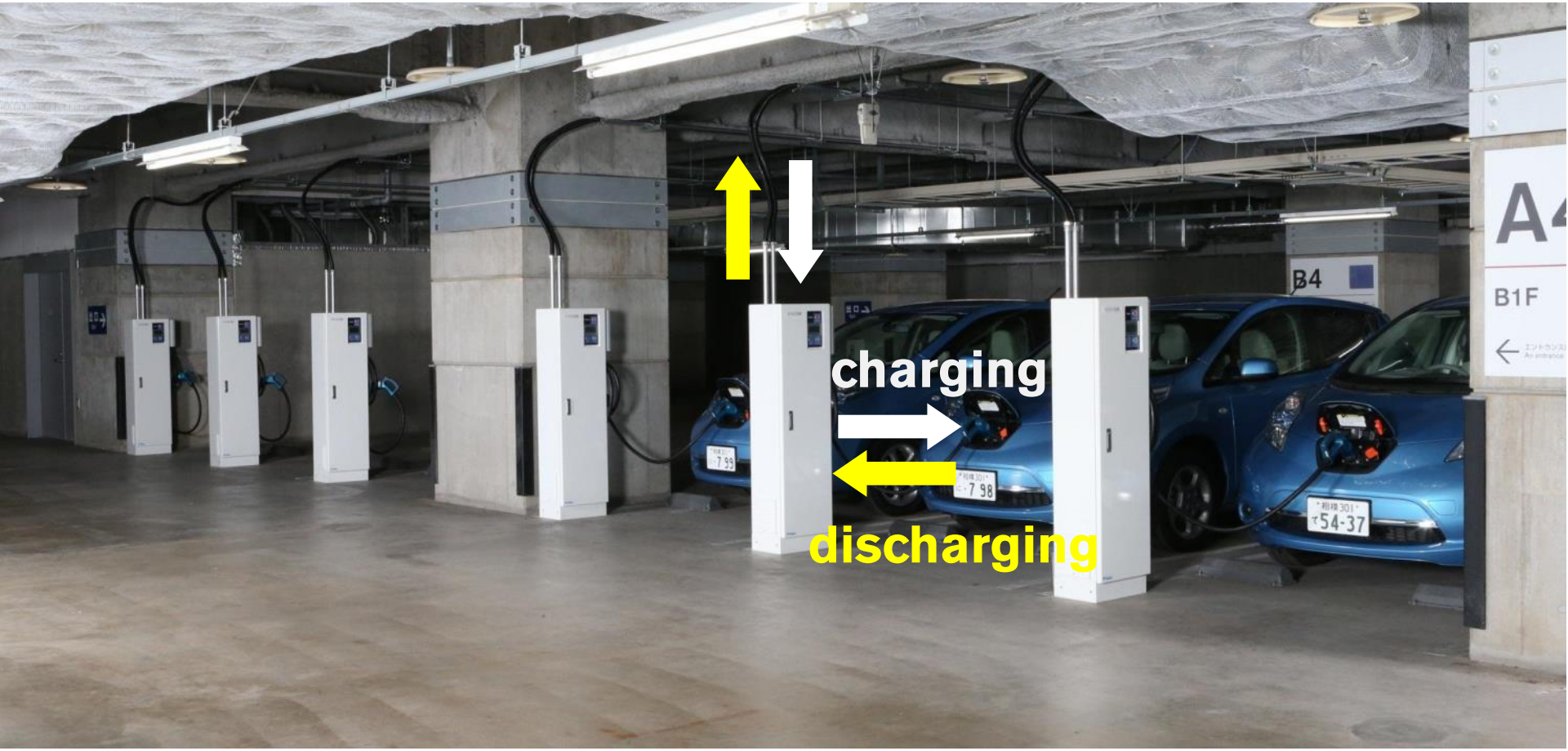
Power Saving Initiative with Nissan LEAF

- A trial in Osaka Prefecture delivered expected results.



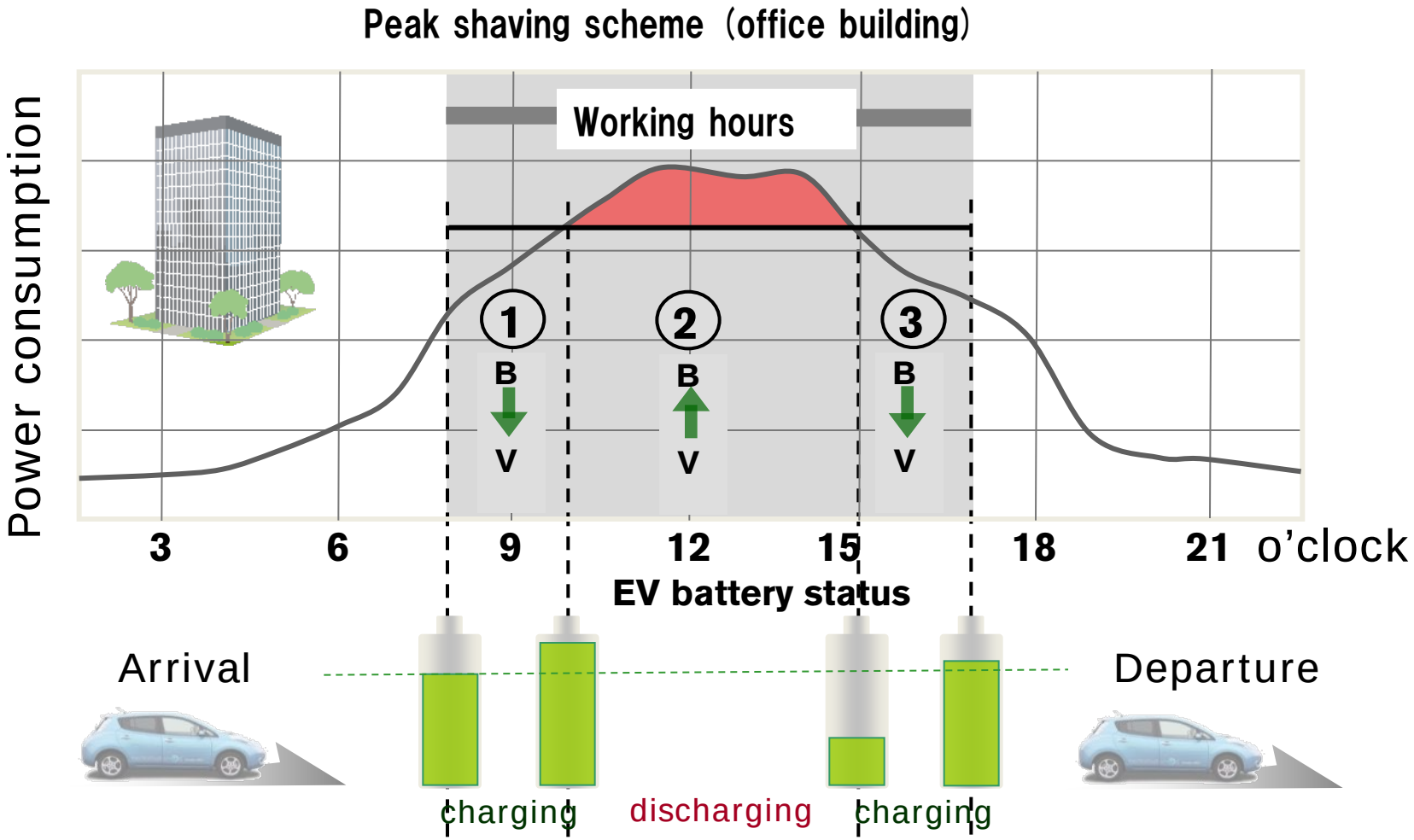
Real-world Evaluation at NATC (Nissan Advanced Technical Center)

- Peak shaving by EV commuters



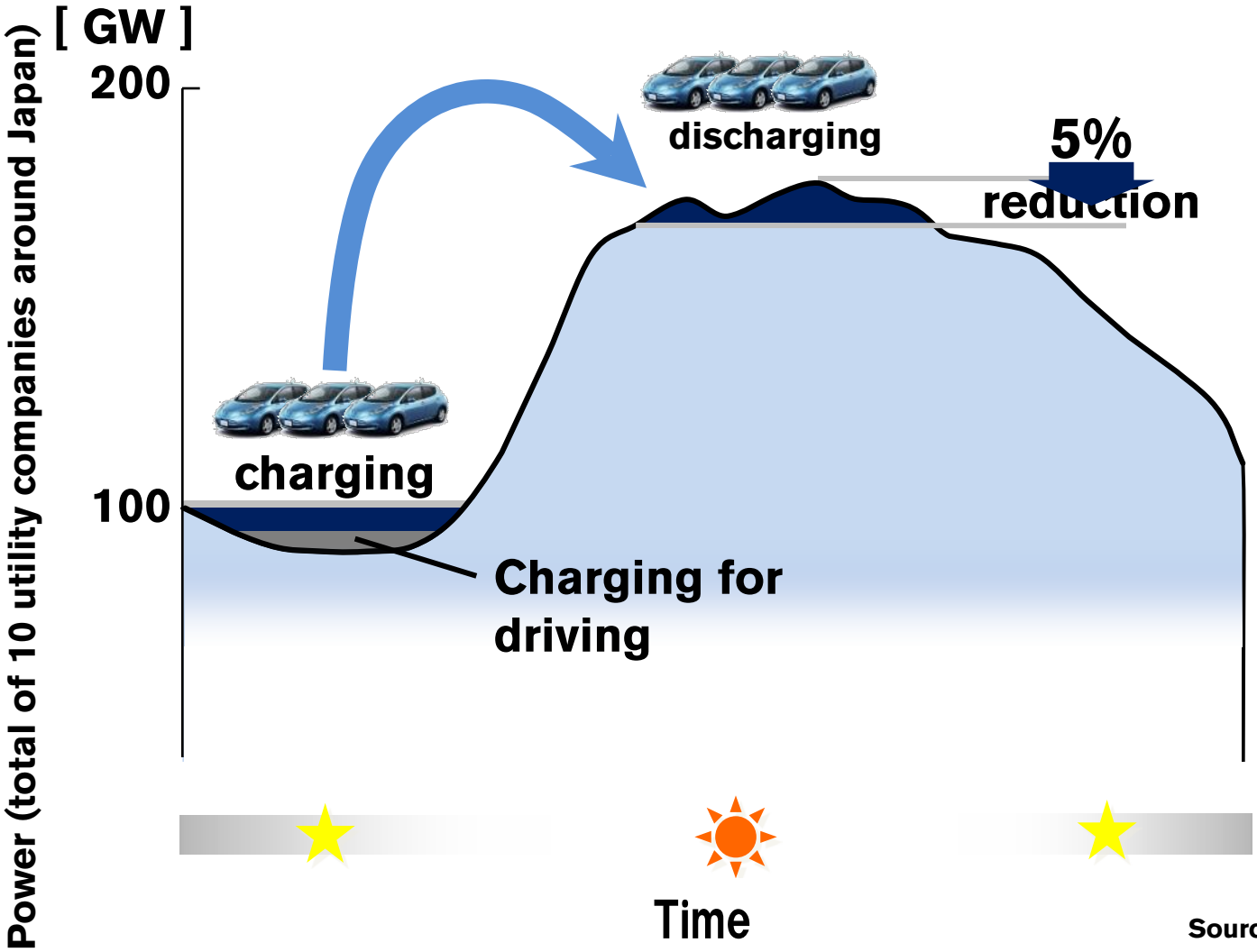
V2B (Vehicle to Building)

- EVs parked at the office supply electricity and contribute to peak shaving
- EVs are charged by the time when an employee leaves



Leveling Power Consumption with EV

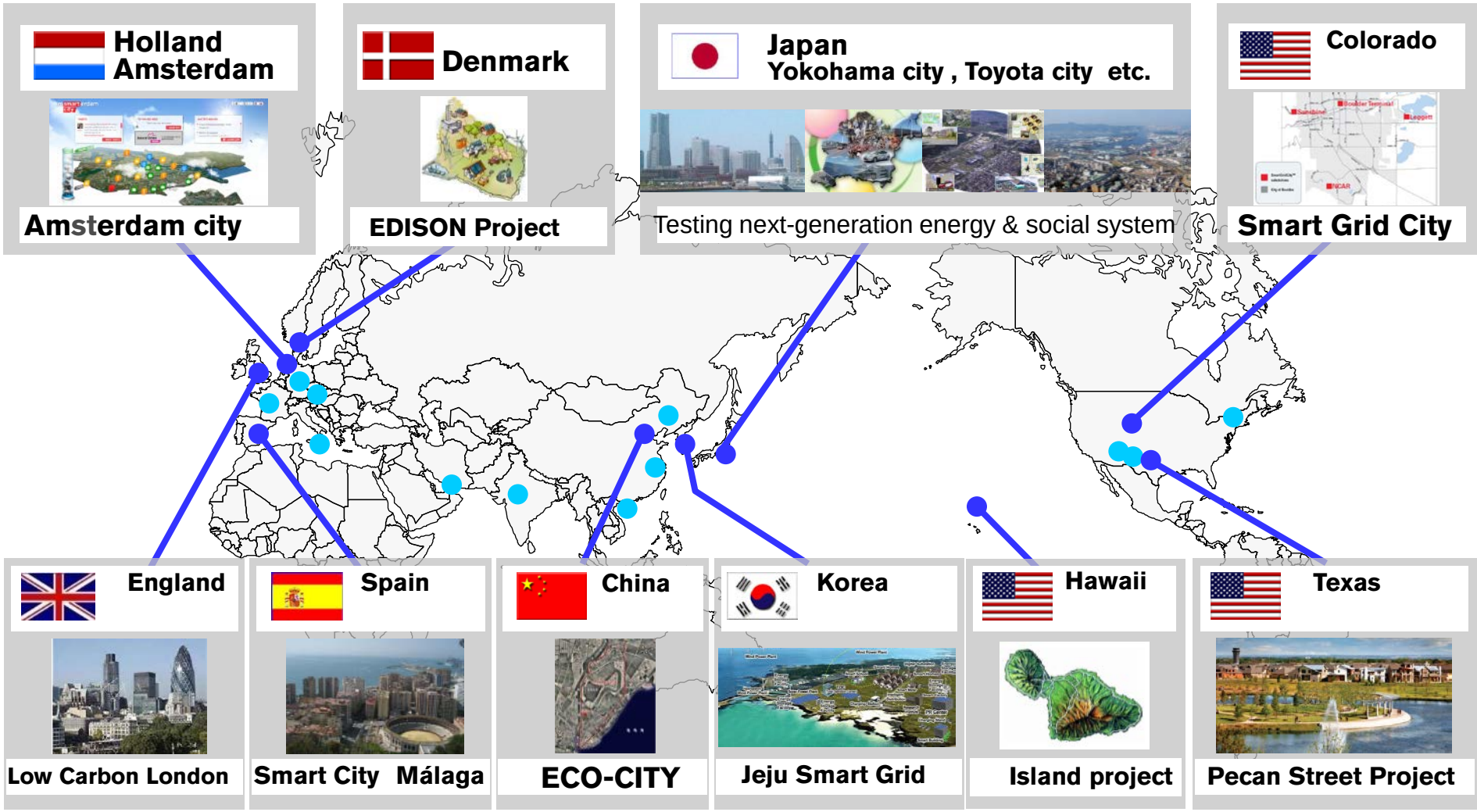
- If 10% of cars in Japan are replaced with EV, it results in 5% peak shaving



Source: Nissan Motor

In Pursuit of Smart Community

- **Big-scale real-world evaluation is underway around the world**



Proposal of New Mobility

ちょこっとカーシェア。
さくっとリターン。

チョイモビ

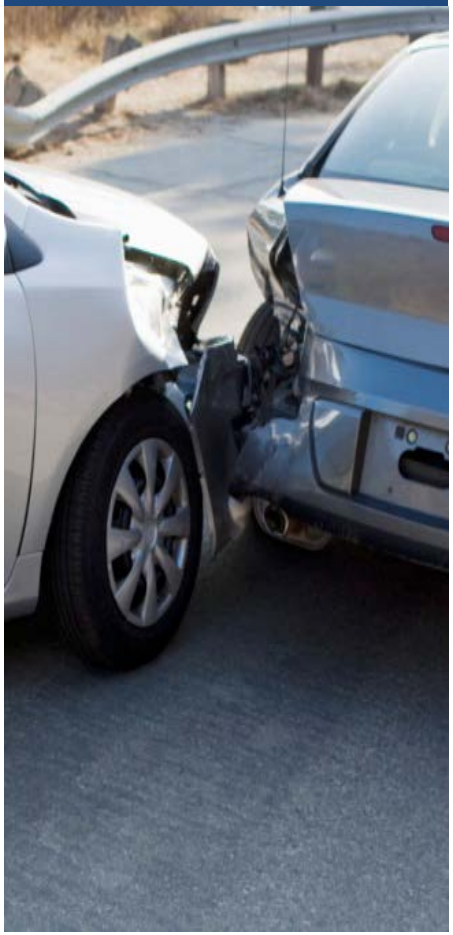
“Choimobi “
Yokohama city

- revolutionary
- clean
- safe
- accessible

OAL×OAW×OAH	**: 2340 × 1230 × 1450 (mm)**
Capacity	**: 2 persons (in the front & the rear)**
Max speed	**: approx. 80km/h**
Weight	**: 470kg(w/ doors) 500kg(w/out doors)**
Output	**: rated power 8kW, max.15kW**
Range	**: approx. 100km**
Charging method/time	**: standard 200V, approx.4 hrs**

Vehicle Intelligence for Zero Fatality

Traffic accident



Traffic Fatalities

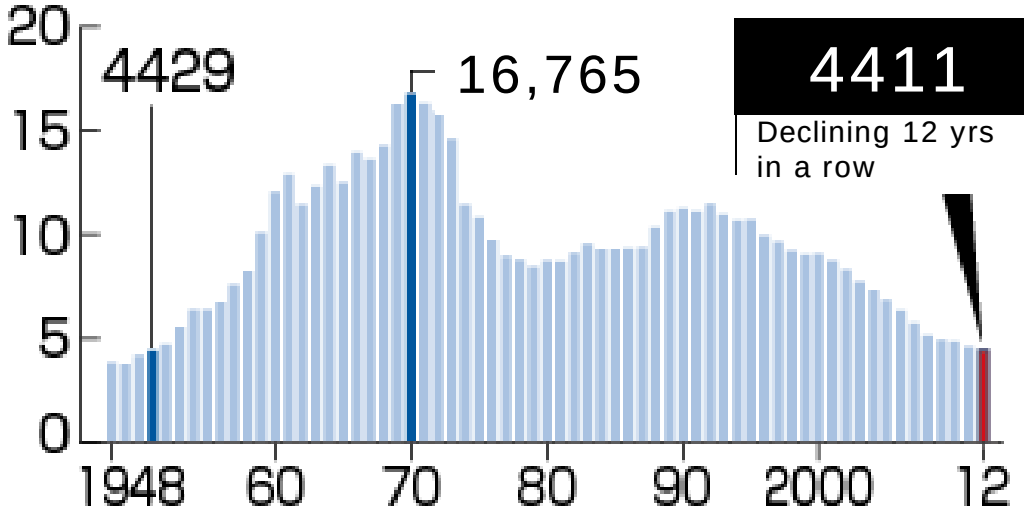
- More than 1.2 million people die in traffic accidents around the world.

	Rank	fatalities (1000 people)
1	India	**126**
2	China	**67**
3	US	**34**
4	Russia	26
5	S. Africa	13
	⋮	
13	Japan	4

＜2009 WHO＞

- #of fatal accidents in Japan peaked in 1970 and is on the decline.
- Yet over 4,000 people die every year.

History of traffic fatalities in Japan



Economic loss inflicted by traffic accidents around the world

Approx. ¥60 tril. / year

※Estimated by Nissan Research Ce

Economic costs of road traffic congestion

Approx. 44 tril. / year

※Estimated by Nissan Research Cente

Economic opportunity of autonomous driving (per year)

Accident loss ¥60tril

Congestion loss¥44tril

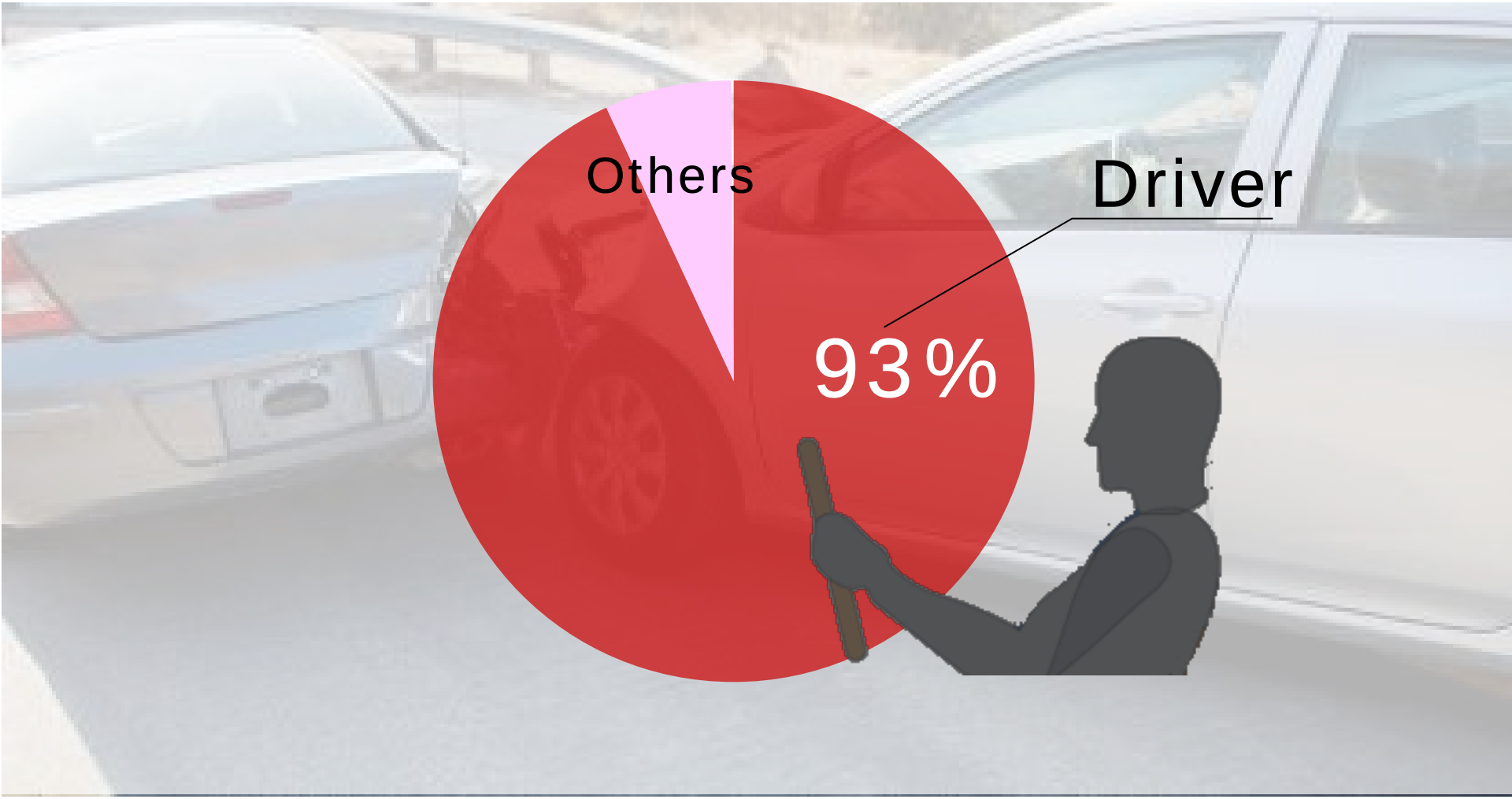
¥104tril.*

Equivalent to 2% of global GDP

(equivalent to GDP of South Korea)

Impediment to safety

- More than 90% of traffic accidents are caused by human errors



3 Factors of Vehicle Intelligence

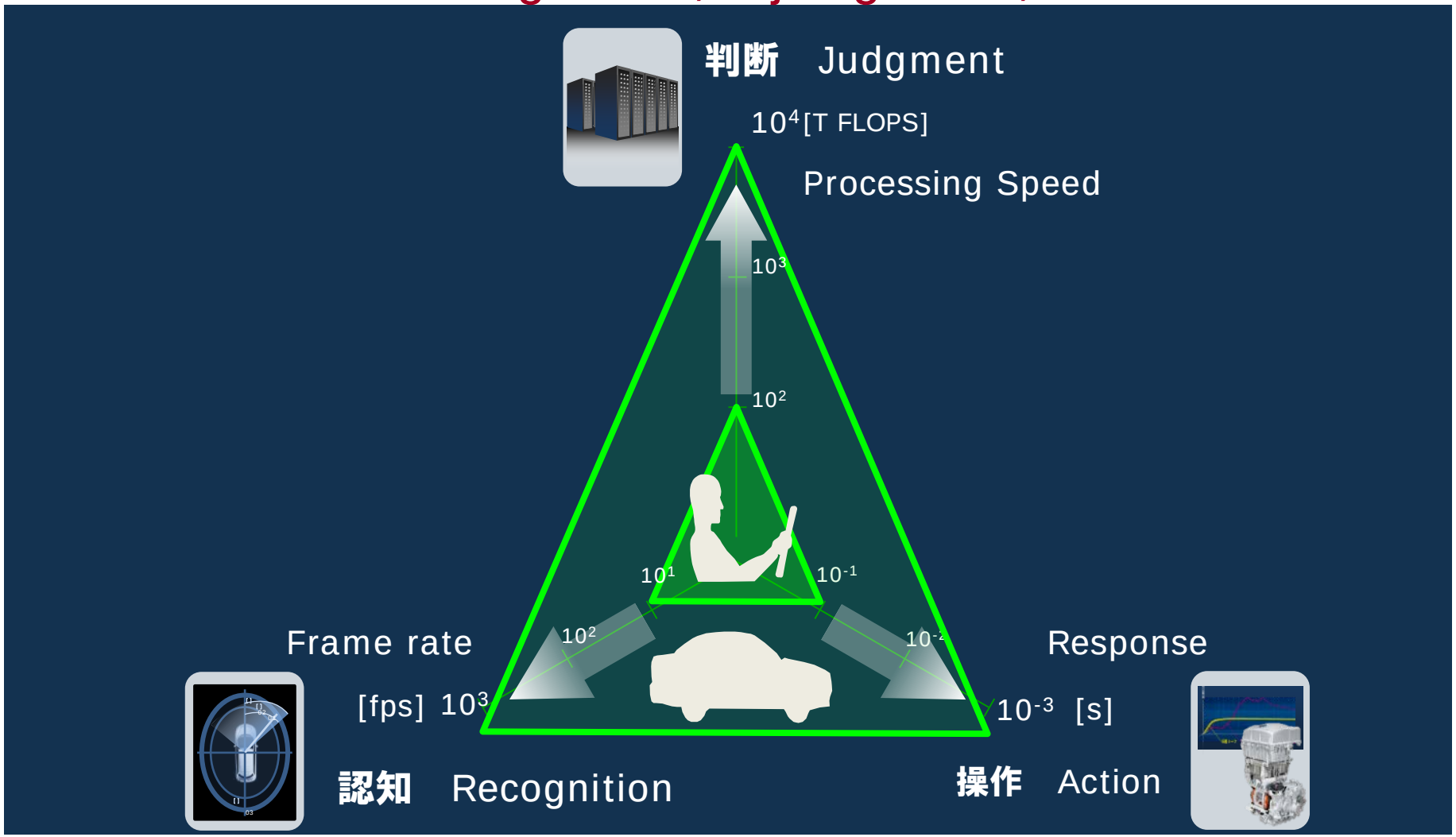
recognition

judgment

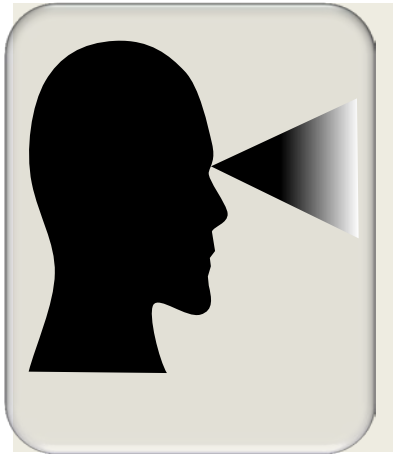
action

Application of State-of-the-art Technologies

- 100 times more capable than a human being in terms of “recognition,” “judgment,” and “action”



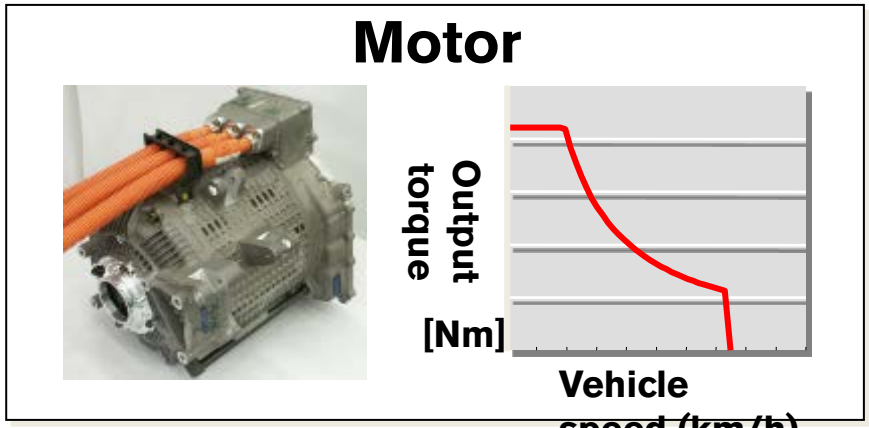
Better Recognition

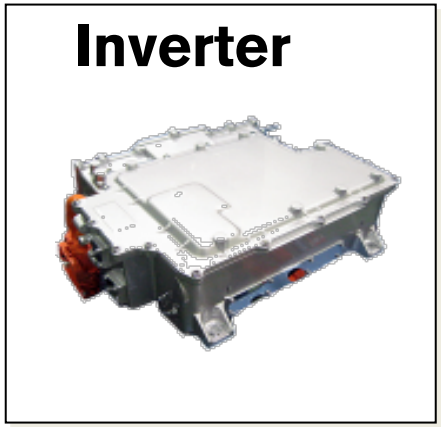


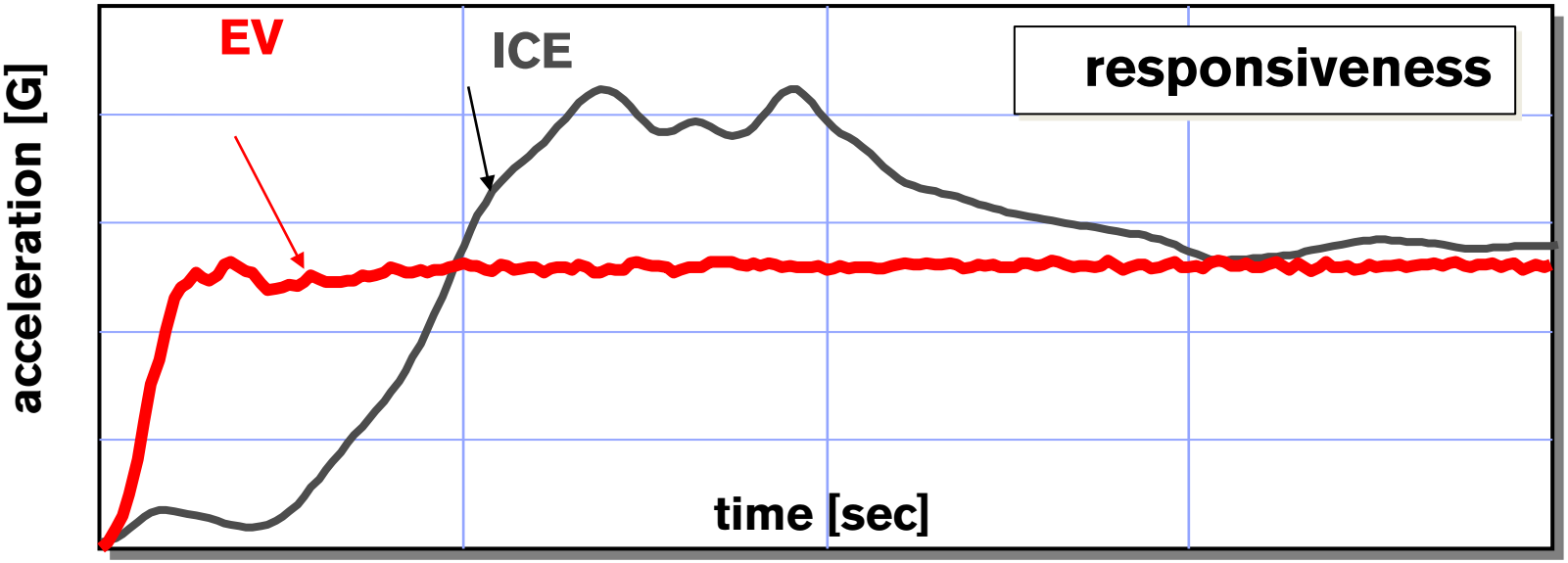
High speed camera recognizes images in slow motion

Affinity between EV and autonomous driving

- Motor generates maximum torque in low-speed revolution zone.
- Inverter control ensures quick acceleration and sharp response in whole speed range.



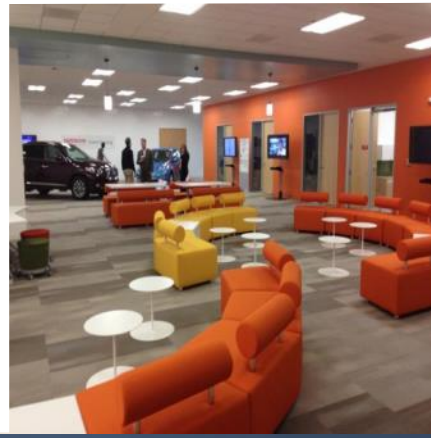




Value of Vehicle Intelligence（VTR）

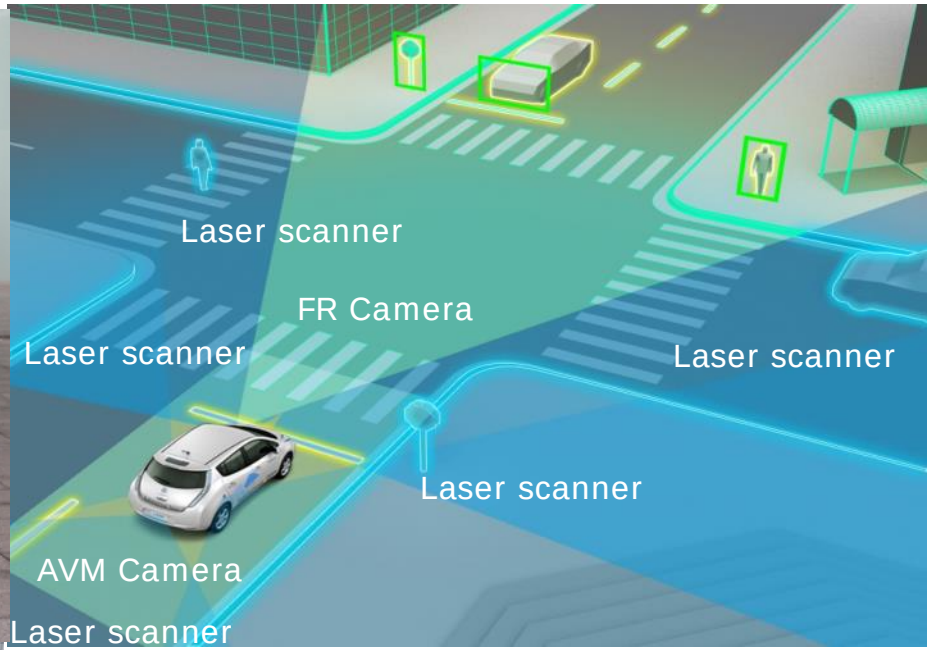
- **Safe mobility for everyone through autonomous driving**

Silicon Valley Office, Nissan Research Center opened in 2013



Autonomous driving technologies will be applied to multiple models by 2020

The first proving ground specifically designed for autonomous driving vehicle is under construction in Japan.



Car becomes your partner

Source : Wikimedia Commons

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