

LEON VAN DER MERWE

Vice President, Supply Chain & Manufacturing Support

TOYOTA MOTOR EUROPE



MY SAFETY DECLARATION & MY DIVERSITY COMMITMENT

“I will create an environment to guarantee everyone's safety at work, whilst developing one and all to become the best individual they can be.”

THANK YOU



FROM - TOYOTA MOTOR EUROPE

YTD AUG - TOYOTA KEEPS # 2 POSITION IN EU PC MARKET

FROM 7TH & SUB 5% BRAND IN 2018 TO A SOLID PODIUM POSITION

Jan-Aug 2018					
Manufacturer	Registrations	vs LY	Share	vs LY	
Total	12,962,135	107	(%)		
1 Volkswagen	1,425,540	114	11.0	0.7	
2 Renault	992,458	107	7.7	0.0	
3 Ford	766,715	99	5.9	-0.4	
4 Peugeot	722,678	112	5.6	0.3	
5 Opel/Vauxha	640,005	94	4.9	-0.7	
6 Mercedes	626,753	96	4.8	-0.5	
7 Toyota	618,434	106	4.8	0.0	
8 Skoda	606,022	111	4.7	0.2	
9 Audi	604,345	103	4.7	-0.2	
10 BMW	573,187	100	4.4	-0.3	
11 Fiat	572,732	94	4.4	-0.6	
12 Hyundai	560,892	111	4.3	0.2	
13 Kia	540,935	114	4.2	0.3	
14 Citroen	474,305	107	3.7	0.0	
15 Nissan	457,607	99	3.5	-0.3	

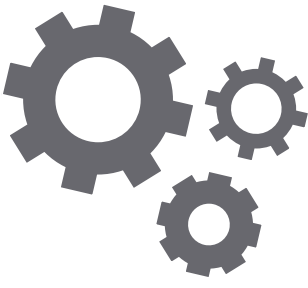
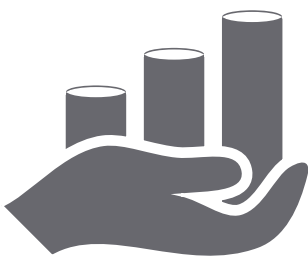

Jan-Aug 2019					
Manufacturer	Registrations	vs LY	Share	vs LY	
Total	12,436,661	96	(%)		
1 Volkswagen	1,321,952	93	10.6	-0.4	
2 Renault	863,344	87	6.9	-0.7	
3 Ford	707,266	92	5.7	-0.2	
4 Peugeot	695,411	96	5.6	0.0	
5 Mercedes	634,564	101	5.1	0.3	
6 Toyota	625,623	101	5.0	0.3	
7 Opel/Vauxha	614,531	96	4.9	0.0	
8 Skoda	609,626	101	4.9	0.2	
9 BMW	573,214	100	4.6	0.2	
10 Audi	557,222	92	4.5	-0.2	
11 Hyundai	551,060	98	4.4	0.1	
12 Kia	524,278	97	4.2	0.0	
13 Fiat	506,832	88	4.1	-0.3	
14 Citroen	477,727	101	3.8	0.2	
15 Dacia	432,423	108	3.5	0.4	




Jan-Aug 2020					
Manufacturer	Registration	vs LY	Share	vs LY	
Total	8,791,347	71	(%)		
1 Volkswagen	921,142	69	10.5	-0.2	
2 Renault	645,570	75	7.3	0.4	
3 Toyota	502,625	80	5.7	0.7	
4 Skoda	490,218	80	5.6	0.7	
5 Peugeot	486,986	70	5.5	-0.1	
6 Mercedes	454,395	72	5.2	0.1	
7 BMW	445,756	78	5.1	0.5	
8 Ford	441,488	62	5.0	-0.7	
9 Kia	422,490	81	4.8	0.6	
10 Hyundai	406,506	74	4.6	0.2	
11 Audi	395,222	71	4.5	0.0	
12 Fiat	353,050	69	4.0	-0.1	
13 Citroen	310,248	65	3.5	-0.3	
14 Opel/Vauxha	304,321	51	3.5	-1.4	
15 Dacia	262,370	61	3.0	-0.5	

Jan-Aug 2021					
Manufacturer	Registrations	vs LY	Share	vs LY	
Total	10,076,971	115	(%)		
1 Volkswagen	1,059,935	115	10.5	0.1	
2 Toyota	643,960	128	6.4	0.7	
3 Renault	609,057	95	6.0	-1.3	
4 Skoda	553,974	113	5.5	-0.1	
5 Peugeot	545,768	112	5.4	-0.1	
6 Hyundai	526,000	129	5.2	0.6	
7 Kia	524,733	124	5.2	0.4	
8 BMW	521,312	117	5.2	0.1	
9 Mercedes	497,626	103	4.9	-0.6	
10 Audi	465,668	118	4.6	0.1	
11 Ford	417,765	95	4.1	-0.9	
12 Fiat	405,739	116	4.0	0.0	
13 Opel/Vauxha	362,638	115	3.6	0.0	
14 Citroen	344,812	112	3.4	-0.1	
15 Seat	322,935	127	3.2	0.3	

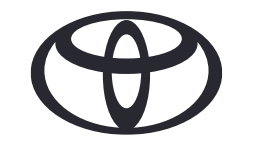


TOYOTA - IN THE WORLD / EUROPE

	Established in 1937	46 manufacturing companies – in 28 regions outside of Japan	€20.2B Net income in FY19-20
	Vehicles sold in 170+ countries & regions	9.53M vehicles sold in CY2020	JAPAN MARKET SHARE 49.9% in CY2020
	17M+ cumulative Electrified vehicles sales	140M+ tonnes CO ₂ saved globally	55 Electrified models

	€10B+ invested since 1990	€6B+ spent with 400 European- based suppliers p/year	Approx. 25k+ Direct employees
	Began selling cars in 1963	1.2 million Vehicles sold in CY21 target	MARKET SHARE 6.0% CY21 target
	3M+ Toyota & Lexus Electrified vehicles sold	54% Electrified mix in CY2020 sales	

~ 370,000 employees worldwide



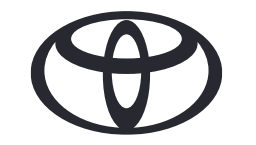
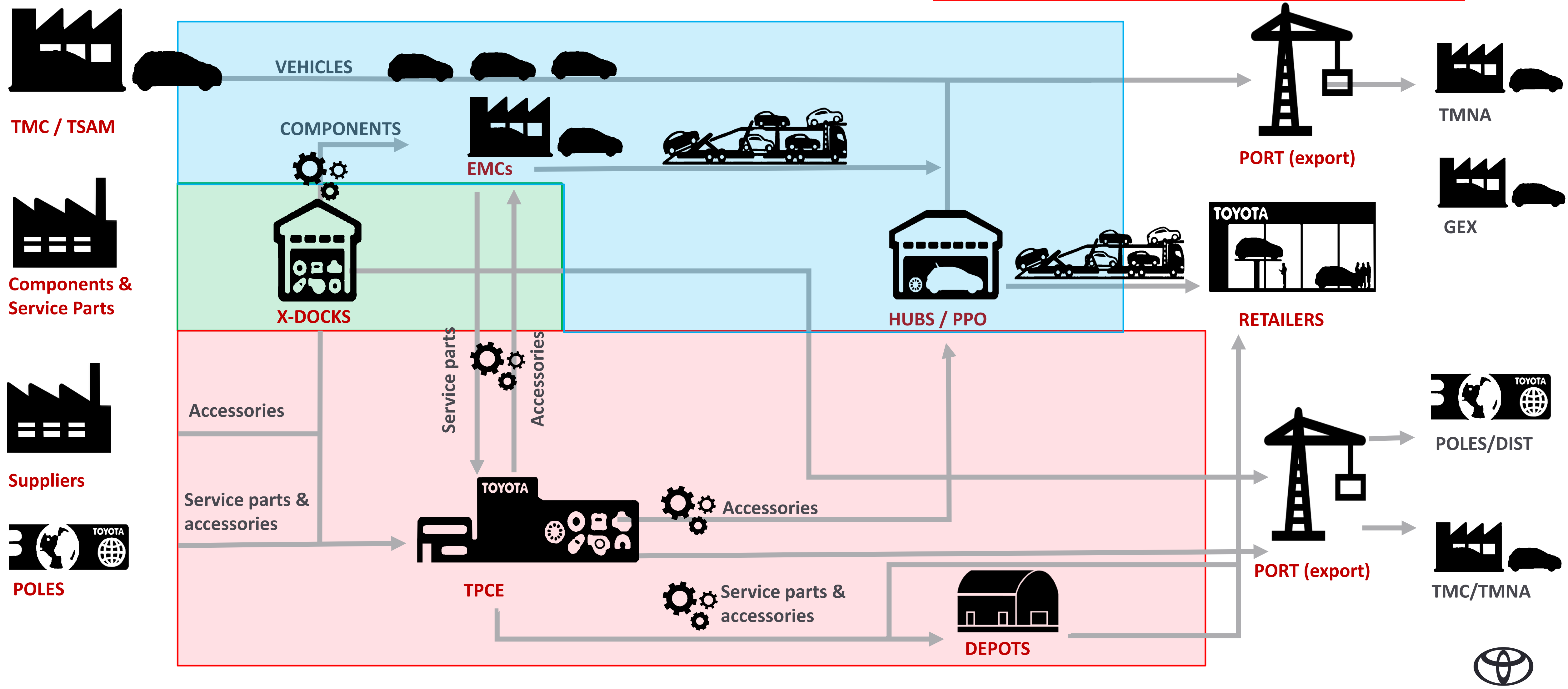
TME SUPPLY CHAIN - SCOPE

PUBLIC
公開
Div: Until: indefinite

Production Parts Logistics Division (PPLD)

Vehicle Logistics Group (VLG)

Parts Supply Chain Group (PSCG)



GROWING OPERATIONS & GROWING SUPPLY CHAIN

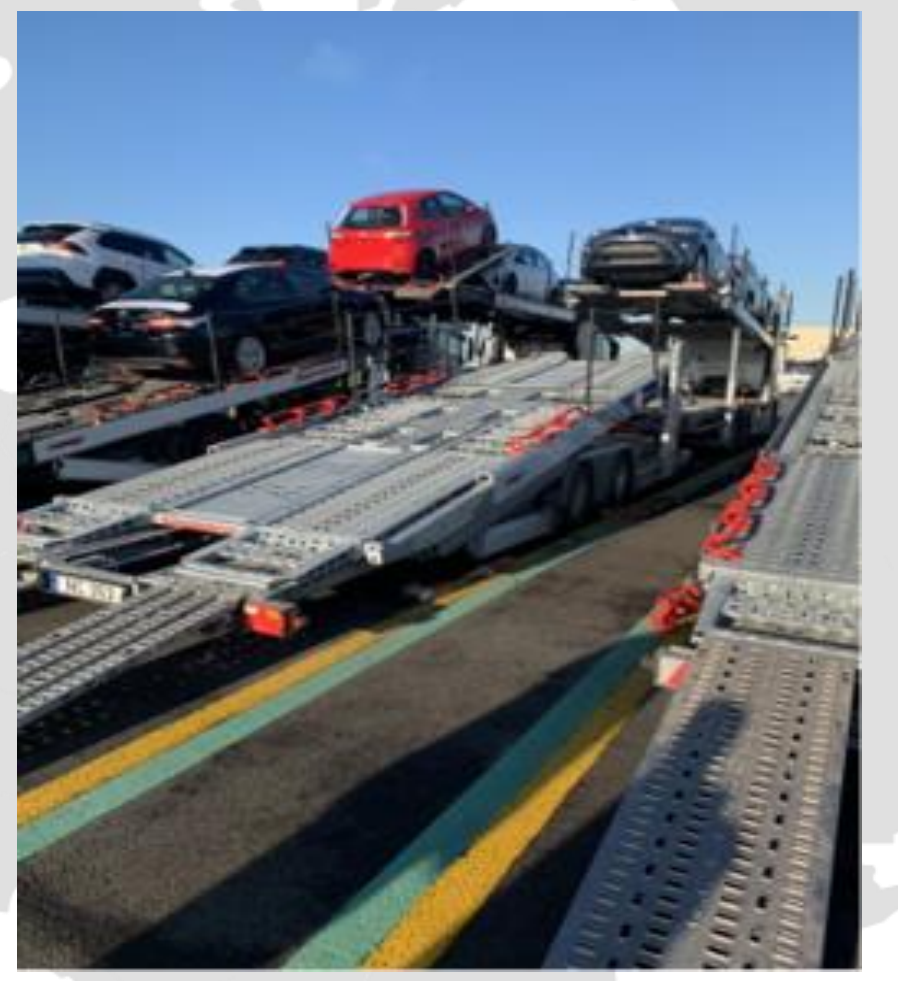
PEOPLE (~4200 members)

	Office	Warehouse	LP/ Support	Dedicated Driver
TOTALS	~350	~1500	~1200	~1500

MOVEMENT (~142 million km per year)

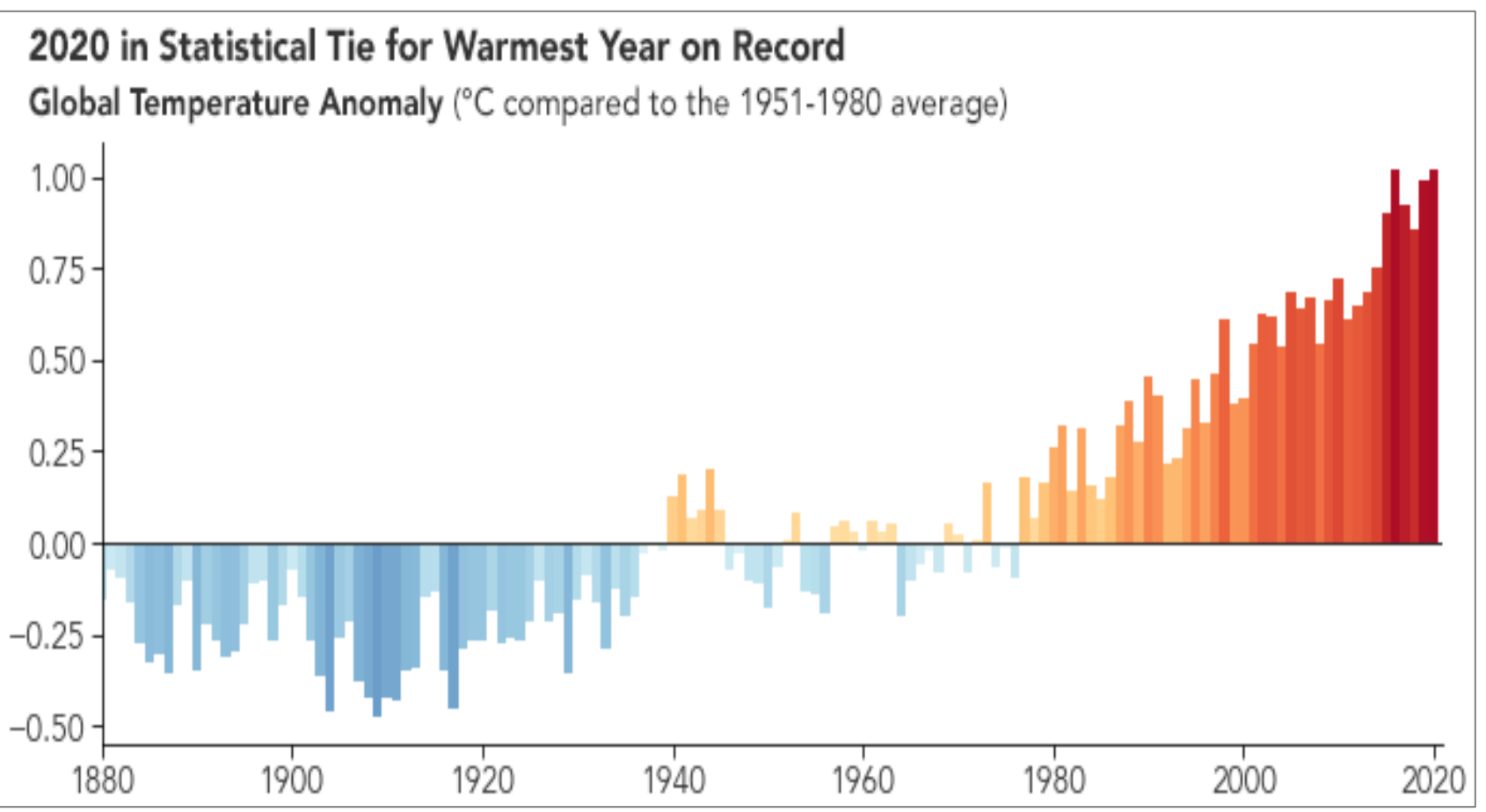
	Trucks KM	Rail KM	Sea KM	Air KM
TOTALS	~110M	~5M	~20m	~12m

STOCK (~ 200k m3 / average ~ 32 days)



2020'S – ENVIRONMENTAL REVOLUTION

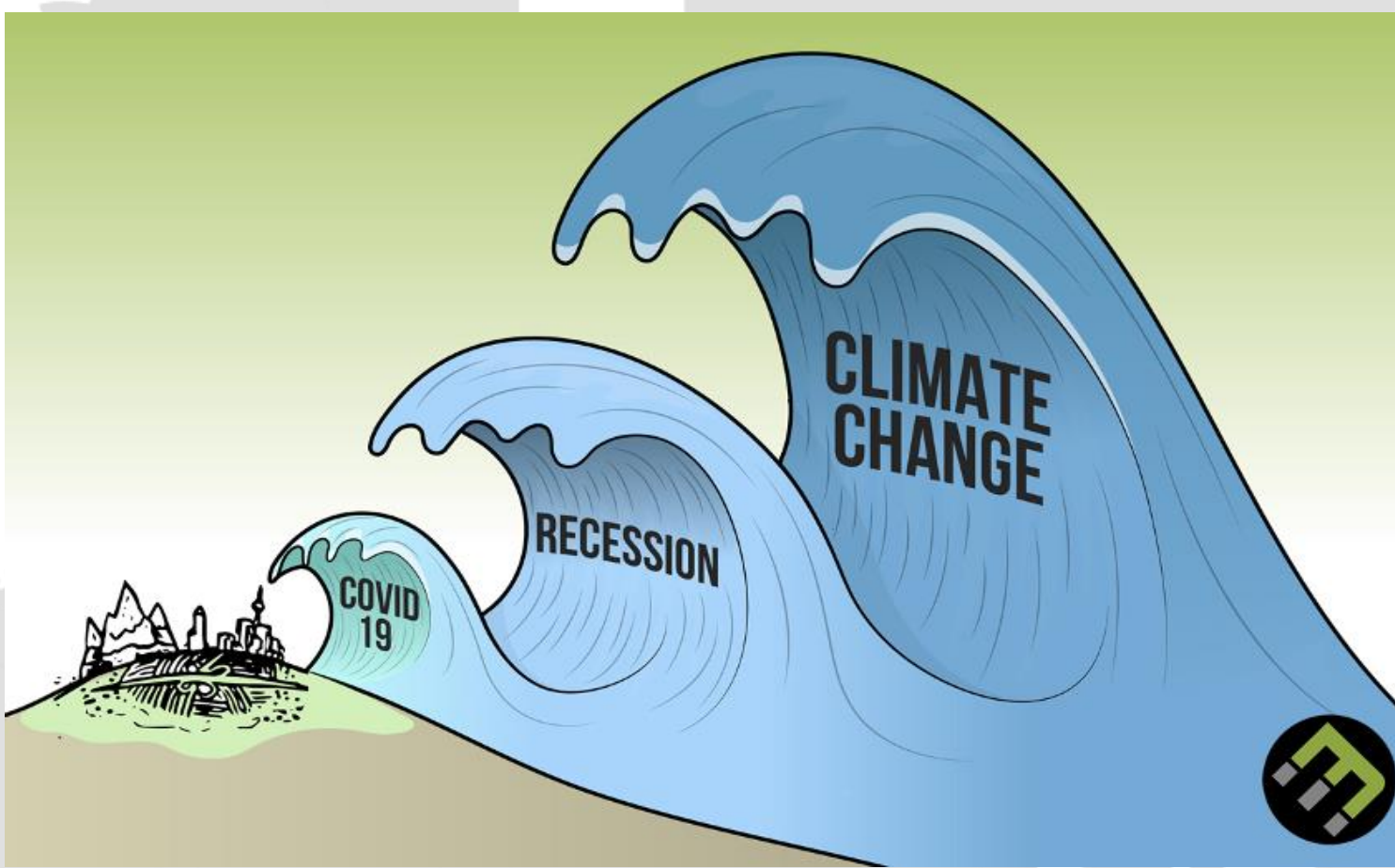
DRIVEN BY CLIMATE DISASTERS AND COVID-19



Global Warming
2020 has seen warmest temperatures recorded, globally

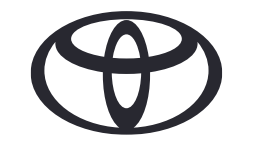


2020 Australian Bushfires
Drought and record heat have contributed to massive bushfires



2020 COVID-19 Pandemic
“Fighting COVID must be our Rehearsal for Fighting Climate Change”

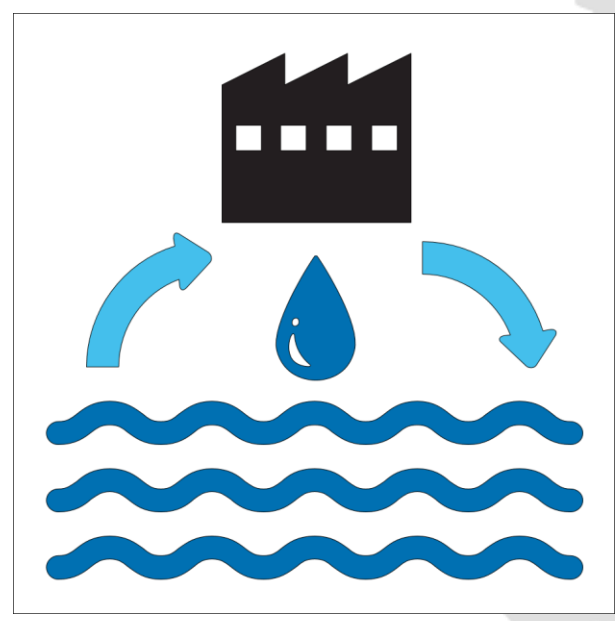
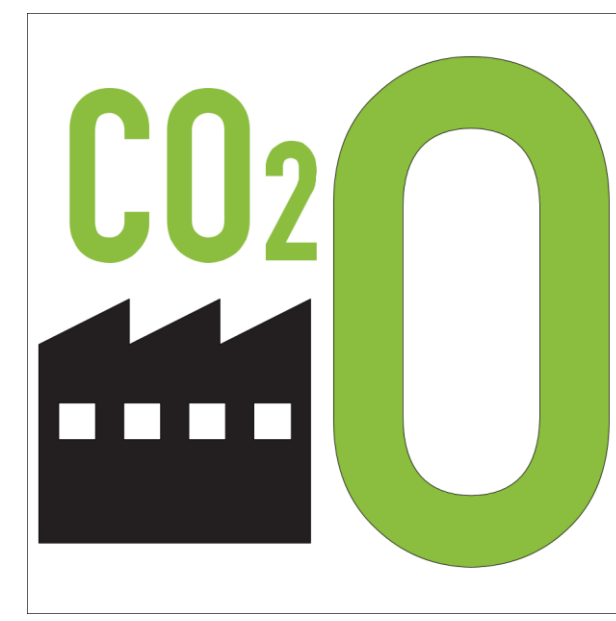
Doing nothing is not an option



TOYOTA - ENVIRONMENTAL CHALLENGE 2050

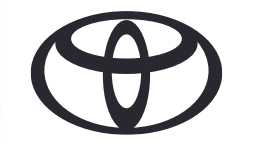
WE HAVE BEEN PIONEERING SINCE 2015

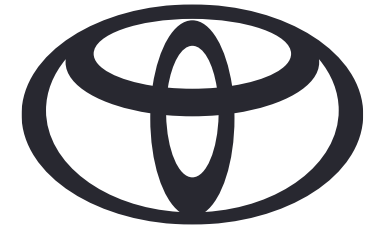
TOYOTA ENVIRONMENTAL CHALLENGE 2050



TOYOTA - ENVIRONMENTAL CHALLENGE 2050

- Challenge** **CO₂ 0** **New Vehicle Zero CO₂ Emissions Challenge**
- Challenge** **CO₂ 0** **Life Cycle Zero CO₂ Emissions Challenge**
- Challenge** **CO₂ 0** **Plant Zero CO₂ Emissions Challenge**
- Challenge** **Challenge of Minimizing and Optimizing Water Usage**
- Challenge** **Challenge of Establishing a Recycling-based Society and Systems**
- Challenge** **Challenge of Establishing a Future Society in Harmony with Nature**





VIDEO HERE

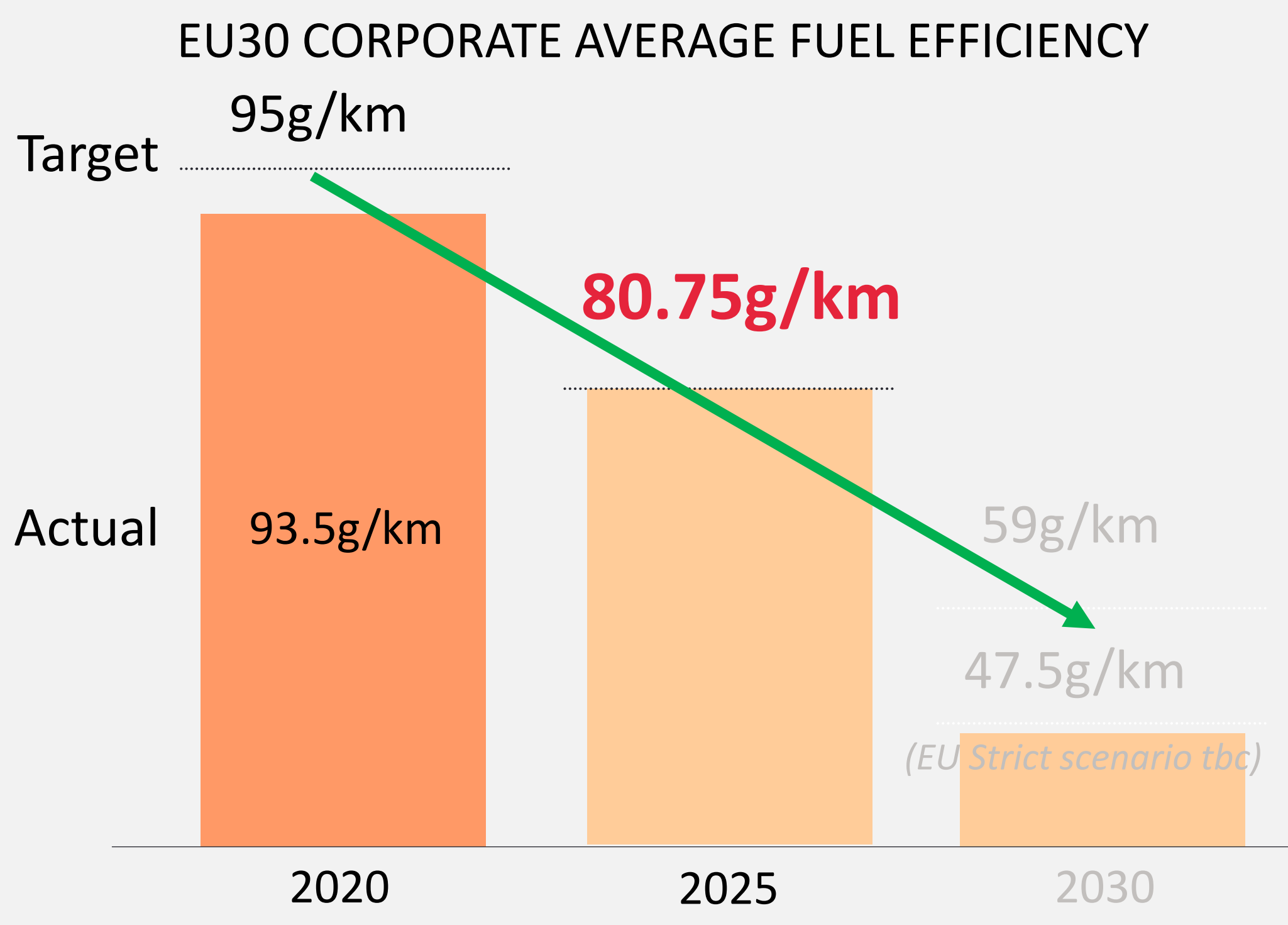
PHASE 2 – 2025 MID-TERM TARGETS

PUBLIC
公開
Div: Until: indefinite

PRODUCT & SALES NETWORK

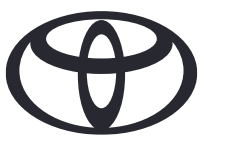
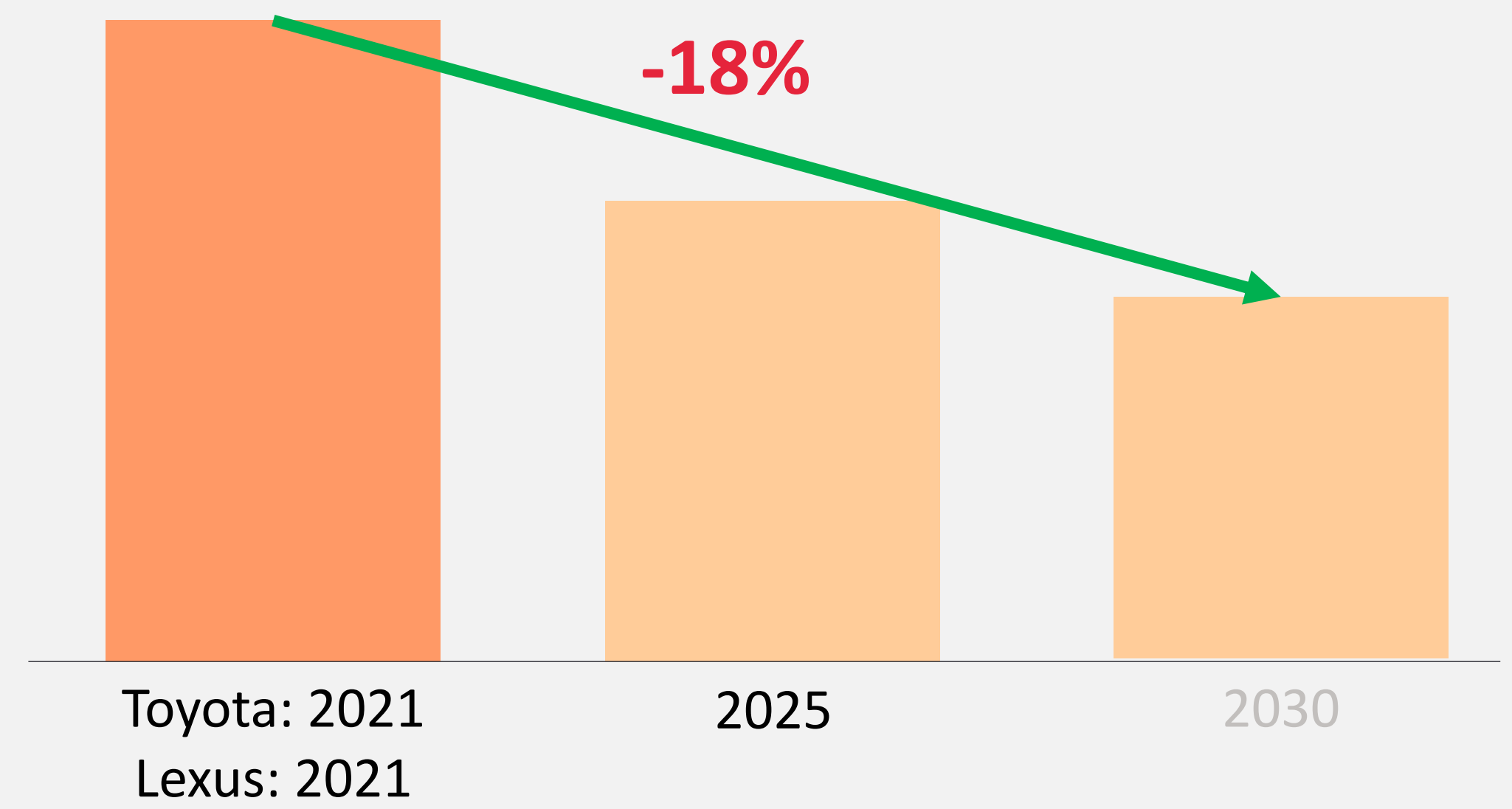


Product



Sales Network

80% OF RETAILERS TO REDUCE CO₂ EMISSIONS BY 18%



PHASE 2 – 2025 MID-TERM TARGETS

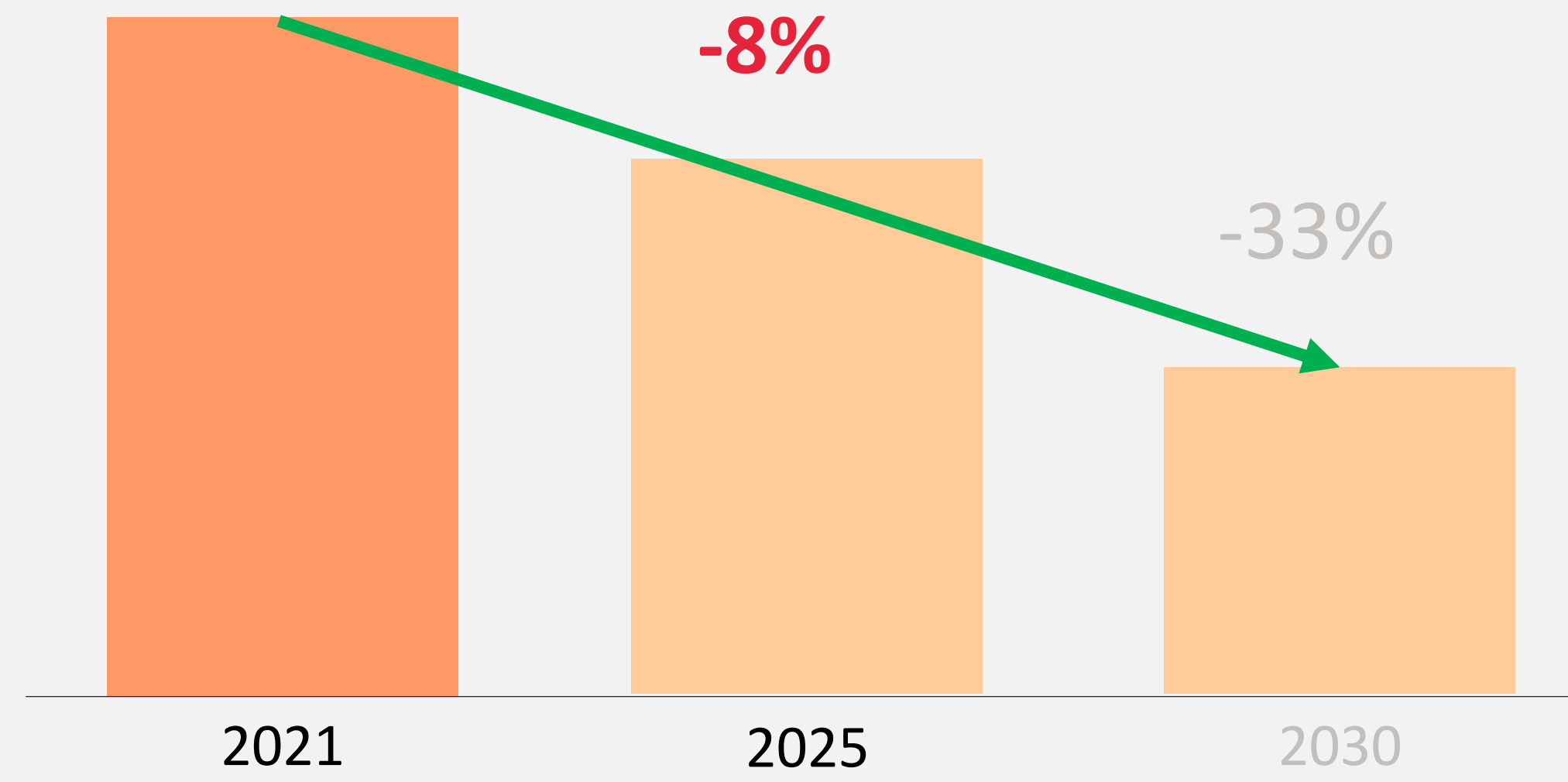


PUBLIC
公開
Div: Until: indefinite

SUPPLIERS & EUROPEAN MANUFACTURING PLANTS

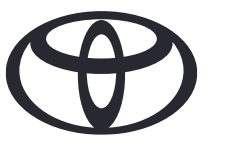
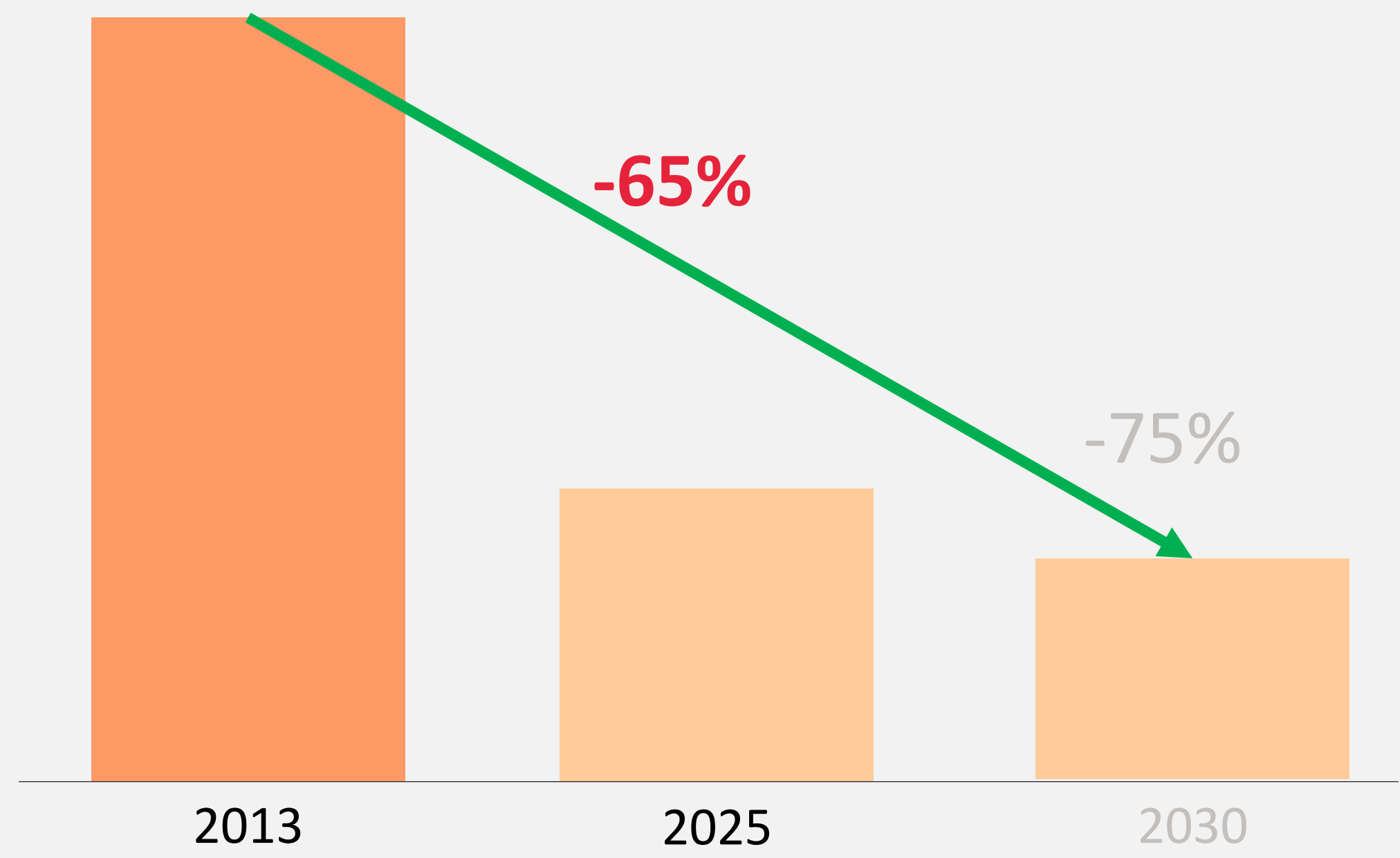
TME suppliers

TIER 1 SUPPLIER CO₂ EMISSION REDUCTION



European manufacturing plants

Absolute Plant CO₂ emissions



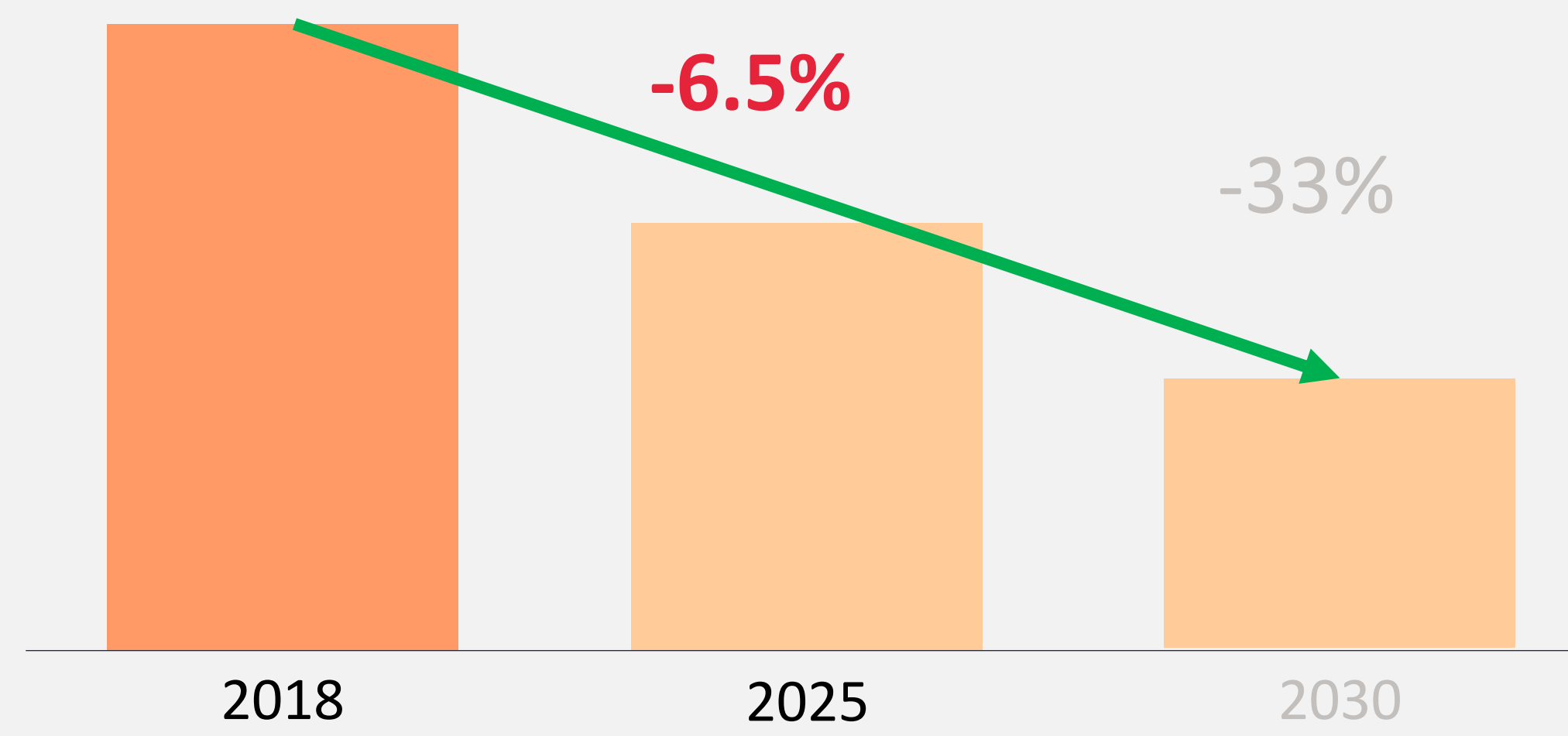
PHASE 2 – 2025 MID-TERM TARGETS



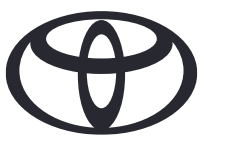
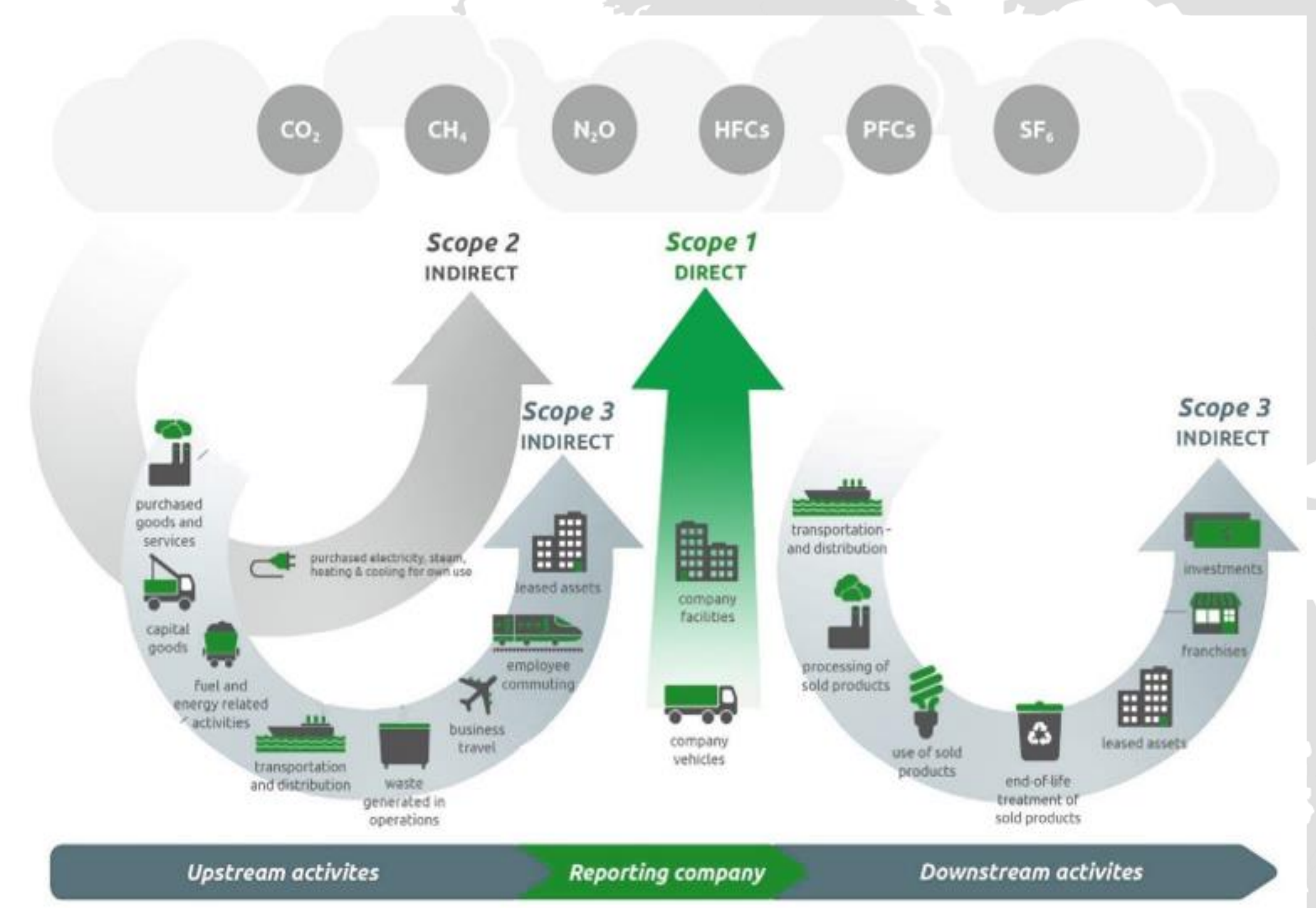
LOGISTICS

Logistics

ABSOLUTE CO₂ EMISSION FROM MOBILE SOURCES



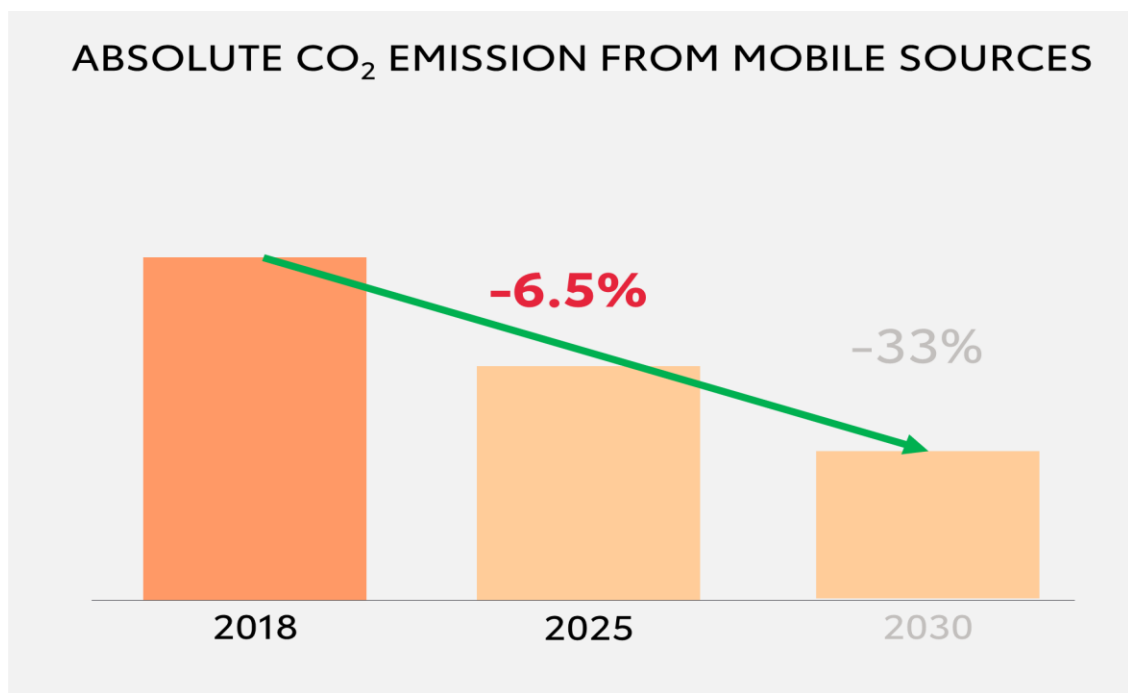
GHG Footprint



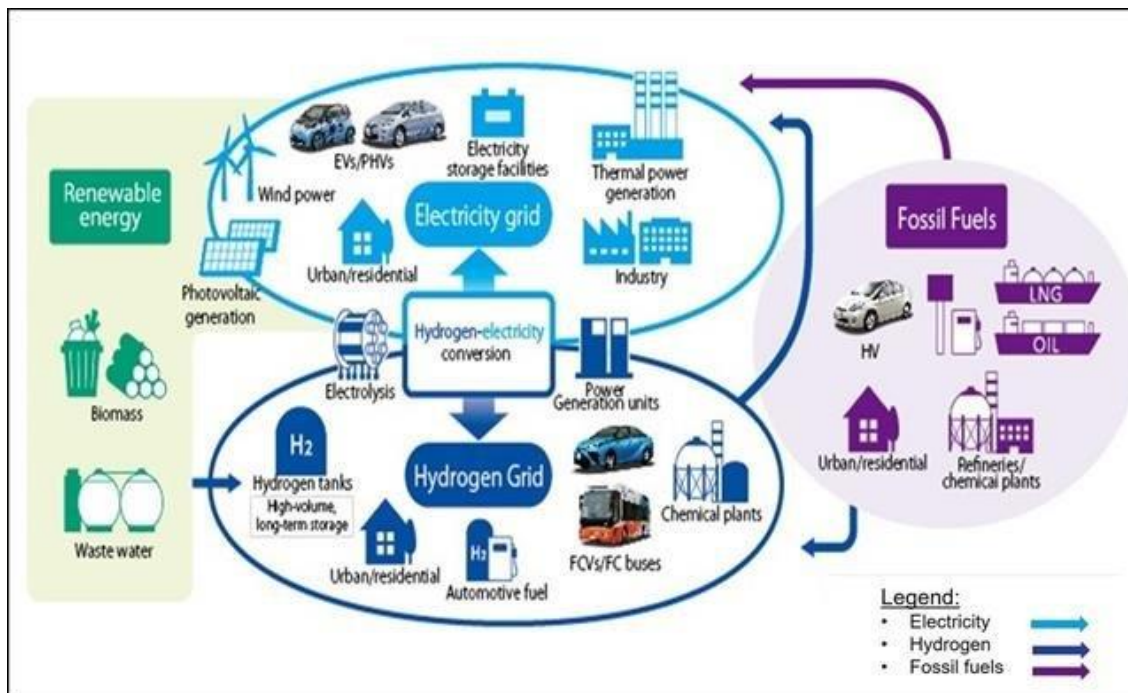
SUPPLY CHAIN – PHASED APPROACH



Reinforce our own assessment by creating a uniformed & robust CO₂ calculation method & scope



Activities to achieve our 2025 mid-term targets

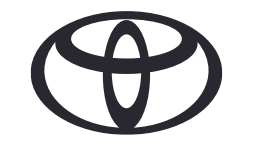
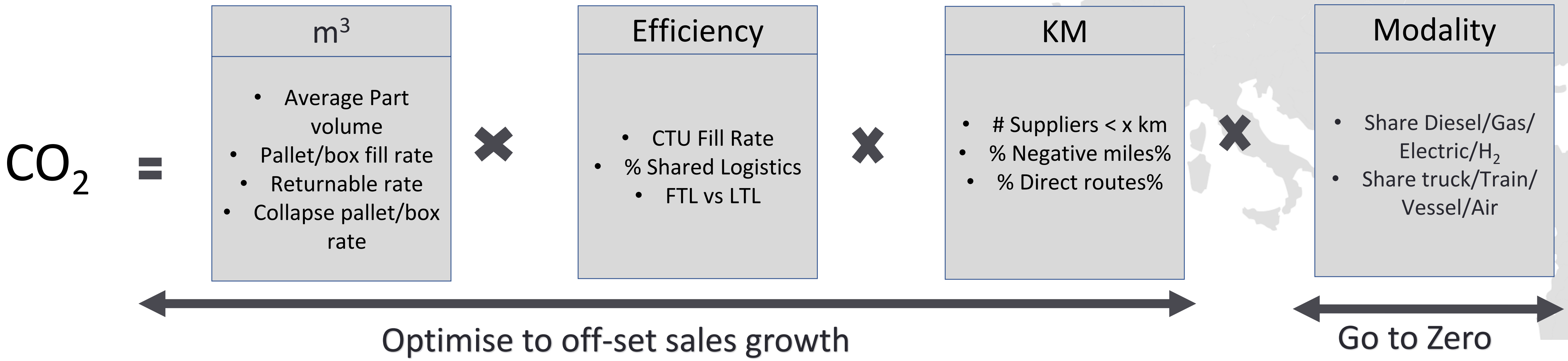


Technology advancements towards a zero-emmission society



REINFORCE OUR OWN ASSESSMENT

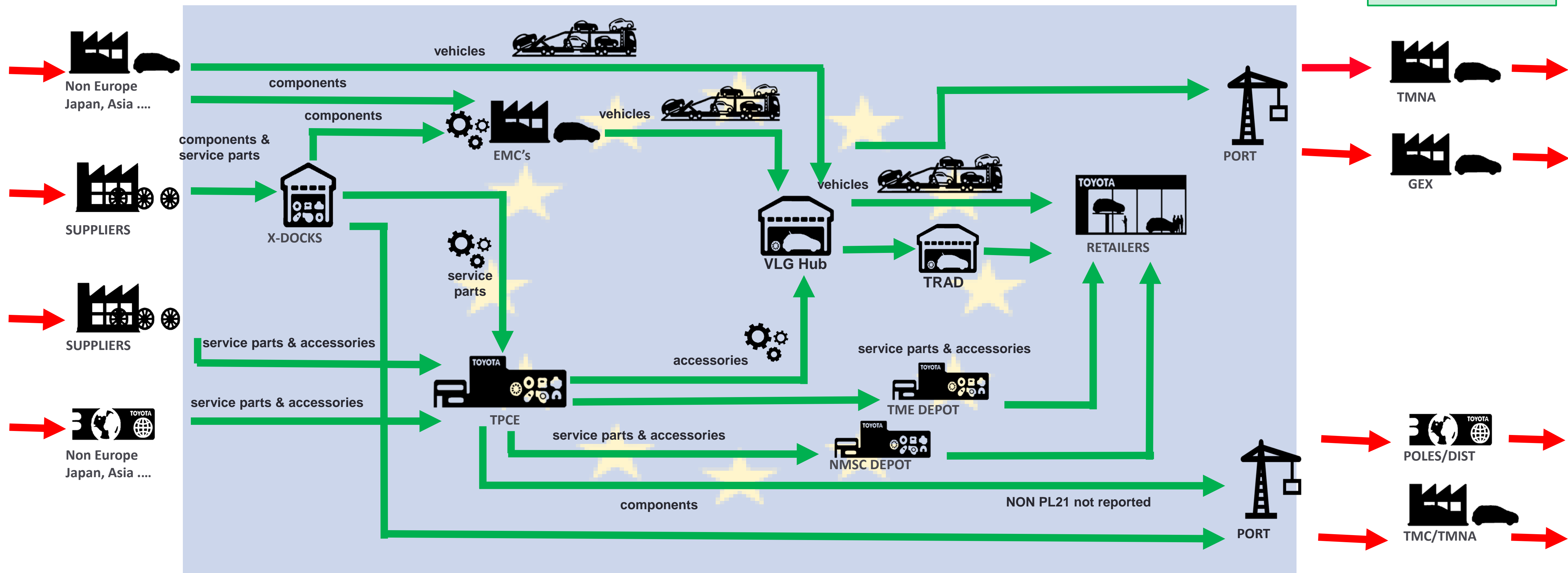
GHG Protocol		Emission		Data availability
Highly Recommended	Scope 3	Upstream Activities	All emissions from Purchase of goods & services	Under study
			Upstream transportation	
		Downstream Activities	Downstream transportation*	



SUPPLY CHAIN SCOPE – FUTURE REPORTING PROPOSAL

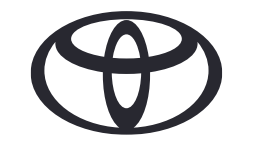
TME not report

TME report



Ideal

Report all emissions related to **Sales within our territory**

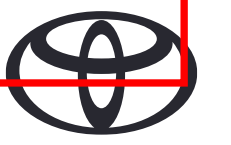
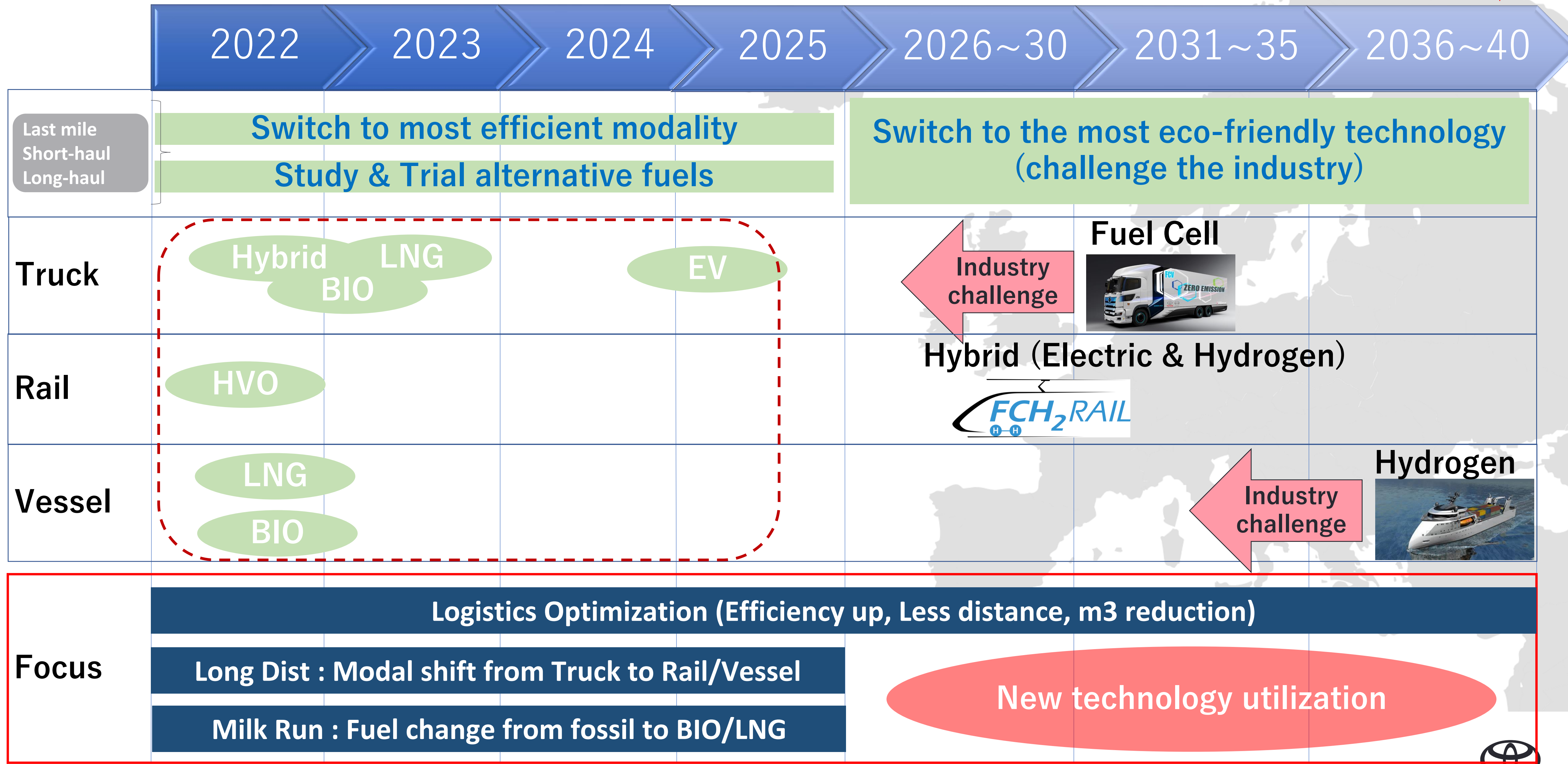


CO2 ROADMAP TOWARDS 2040

-- PROTECTED 関係者外秘

PUBLIC 公開
Date Until: Indefinite

Challenge: Carbon Zero by 2040



TECHNOLOGY ADVANCEMENTS - TOWARDS A ZERO EMISSION SOCIETY

Available now (2021)

BEV Vans



CNG Trucks



HVO trucks



Evolving technology (2025-2030)

BEV mid range trucks (regional distribution)



Volvo FM Electric
Range 300-400 km

Biofuel vessel



(>2024)

Biodiesel / methanol
Ammonia

H2 Train

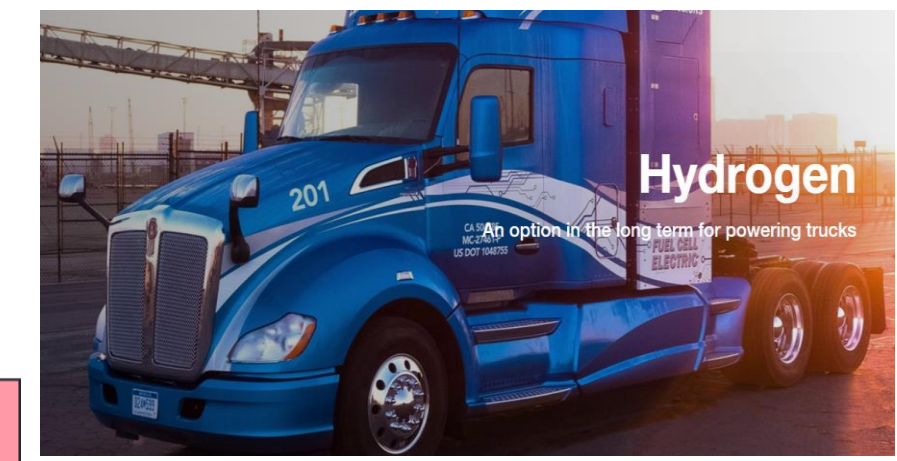


Passenger: 2024/25
Commercial: 2025/26

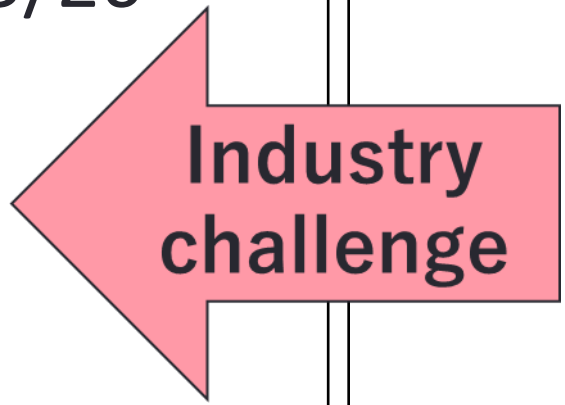


Future technology (2030+)

HGV long haul H₂ /BEV (beyond 2030)



H₂ Vessel (beyond 2030)



To go to zero emission, we are dependent on technology, infrastructure and green fuel availability in all markets we operate

TOKYO – 2020

-- PROTECTED 関係者外秘



TOYOTA
Worldwide Partner



PUBLIC
公開
Div: Until: indefinite



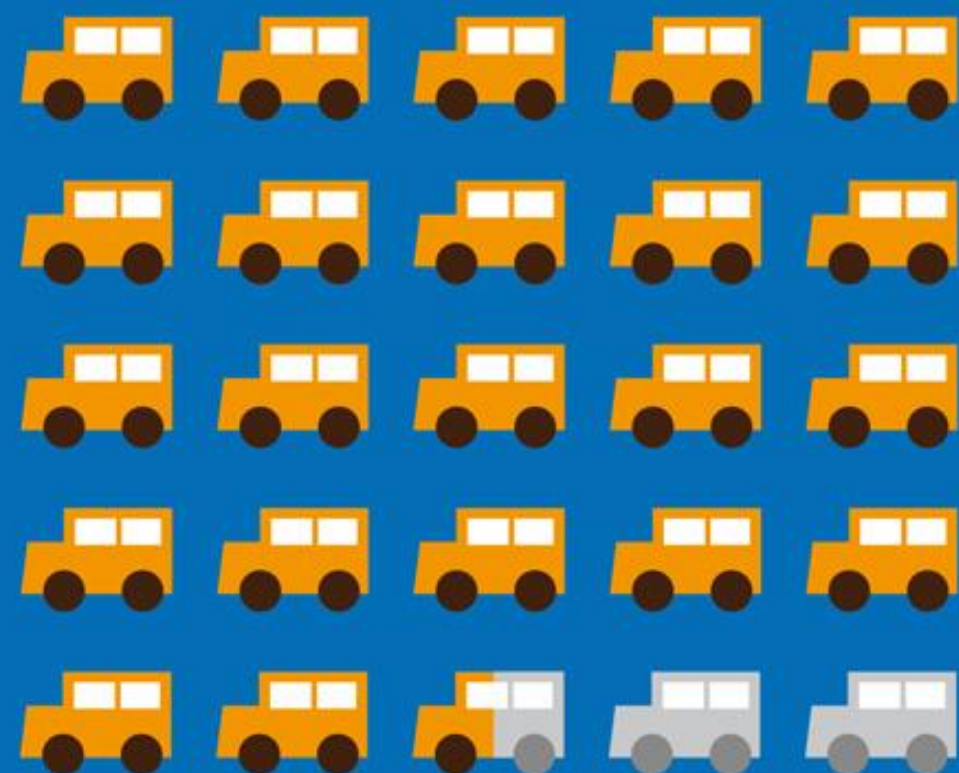
SUSTAINABILITY

Toyota-provided fleet to include
approx.

3,700 vehicles

Electrified vehicles
made up

90%



FCEV



MIRAI

approx.

500

etc. vehicles

BEV



APM



Walking
area BEV



e-Palette

approx.

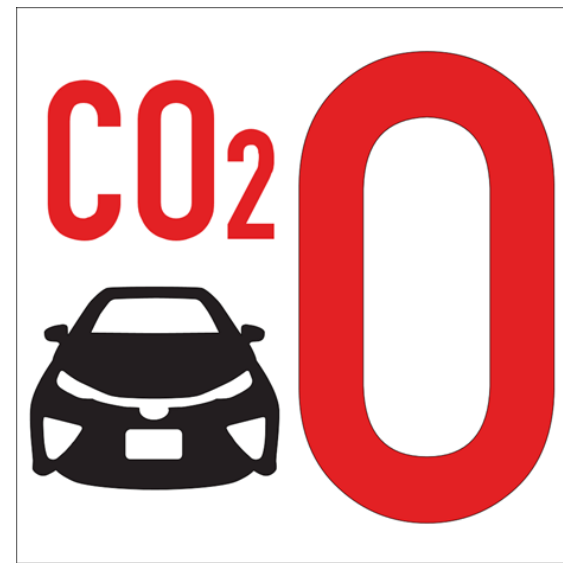
850

etc. vehicles



OUR REQUESTS – TO YOU

WE CANNOT DO THIS ALONE!



TOYOTA ENVIRONMENTAL CHALLENGE 2050

- Please support our environmental activities
- Are you interested in supporting us?
- Let's talk & share good practices, together – we welcome your initiatives

