

Porsche AG Investors Workshop

SHANGHAI, NOVEMBER 25TH

PORSCHE

Porsche AG Investors Workshop

OLIVER BLUME

Chairman of the Executive Board
Dr. Ing. h.c. F. Porsche AG

PORSCHE

The background of the slide is a silhouette of the Shanghai skyline at sunset, featuring prominent buildings like the Oriental Pearl Tower and the Shanghai Tower. The sky is a warm, golden-yellow color. The Porsche logo is centered at the bottom of the slide.

Introductory Speech by Oliver Blume

“Good afternoon everyone – and welcome. It’s great to be back here in Shanghai. It’s been a good 14 years. And it was right next door to where we are tonight. Back in 2009, a whole new chapter of the Porsche story began. When we welcomed a new member to the Porsche family and first presented our luxury and comfort flagship – the Panamera. As always, we were aiming high – as during our last endeavour. Some of you may remember, it involved a hair-raising elevator ride. But you must admit it was spectacular. From the moment it reached the top of the World Financial Center, the Panamera started to excite Porsche customers around the globe.

Today, here, we are a little more grounded. In a place with a fascinating history, while also being so very modern. Where tradition and innovation blend into something special. Just like at Porsche. What we have always had in mind with the Panamera, is the perfect interaction of: iconic Porsche design, a dominant appearance, exceptional driving dynamics, the ultimate long-distance comfort, and generous space for four adults as well as luggage. Altogether, in a four-door sports car.

When we launched it, back in 2009, we were venturing into a new segment. We had done it before, when we introduced the Cayenne. Once again, it would go on to be a great success. More than 375,000 examples of the Panamera have so far been delivered to our customers all over the world. Here in China especially, the Panamera has always been very popular. Since 2011, China has been the largest market for the Panamera almost every year. With the second generation we have more than doubled the sales figures of the first. And those sales figures keep getting better and better. They're outpacing the growth of a segment of which the Panamera's market share is nearly a third. What has always set Porsche apart is that we listen very carefully to our customers' wishes. And a product like the Panamera reflects these wishes down to the smallest details. With numerous options for individualisation, for example – reflecting the evolving notion of luxury. Chinese customers also appreciate a good balance between the enjoyment of driving a sports car and its suitability for business use. This has led to an increasing demand for our long wheelbase Panamera in the Chinese market.

From the very beginning, the Panamera has set the standards in its class. It has paved the way for technological innovations. The air suspension with switchable additional volume, for example. Or the dual-clutch transmission – a first in the luxury class. Already in 2011, two years after the start, we offered the first generation of the Panamera as a hybrid vehicle – absolutely new territory in the luxury class and already showing the potential. This is our goal with the new Panamera. It underpins our claim to offer the most innovative car in its segment. With a focus on comfort, quality, individualisation and performance.

The third-generation is even more cutting-edge, with a completely upgraded engine range – state-of-the-art, more sustainable, more efficient.

For the first time, it has an innovative chassis with active damper control – as an option for all hybrid models. We call it Porsche Active Ride. It enables a totally new level and a whole new range between performance and comfort. Dynamic and nimble on winding country roads. While practically floating over cobbled city streets. Its dynamic spectrum is simply enormous.

And its new design has made the way it looks even more dominant. We have given both its exterior and interior a completely new design. We have also developed several features that are exclusive to the turbo models. We call this the turbo differentiation.

We also want the new Panamera to show our commitment to hybrids. We offered three e-hybrids for the second-generation car. Now we are adding a fourth plug-in hybrid model: the new Turbo E-Hybrid. Its new V8 engine and the new 140-kilowatt electric motor combined provide a total system output of 680 PS or 500 kilowatt – with 930 Newton meters of torque.

This new, high-performance addition fits perfectly into our line-up.

All the new Panamera hybrid models offer improved e-performance, in terms of driving dynamics, charging speed and electric-only range. This range is now up to 93 kilometres. An increase of 75 per cent compared to before.

It's our response to strong customer demand. In some countries, the proportion of Panamera's that are e-hybrids is almost 100 per cent.

And we are once again underlining our powertrain strategy, consisting of internal combustion engines, hybrids and pure-electric systems.

No question about it: electromobility is our top priority. But the ramp-up is not happening at the same speed in every part of the world. We are very well-positioned for this. And the new Panamera really shows just what a hybrid drive is now capable of.

As you all may know, we are celebrating 75 years of Porsche sports cars this year. For 75 years, Porsche has been all about dreams. And about making them come true. In our view, nothing is as individual as a dream. And we believe that the same applies to a dream car.

But we do not only want to present you this amazing new product today.. We will also give you an update on our business in China including our research and development activities, the growth and profit potential in our "Region Number Five" and our individualization strategy.

But before we start with the presentations, let me give you a brief update on our Porsche strategy. "In the beginning I looked around and could not find the car I dreamed of. So, I decided to build it myself." These are Ferry Porsche's famous words.

He made his vision come true.

And this is what we are still doing today: we continue to keep our drive, our innovation, and continuously question the status quo. We are putting all our efforts together to make our customers' dreams come true.

For many of them it's the dream of a lifetime. They are not simply buying a car; they are buying into the Porsche dream. This is the vision that drives us.

This is what we want to be, this is what we always have been: the brand for those who follow their dreams.

Doing so has positioned us in a unique position in the automotive market – all powered by the Porsche story.

We believe that Porsche is well equipped for the future.

Porsche is an iconic brand with a rich heritage.

A brand that stands for sustainable modern luxury.

A brand with a proven track record that helps us to continuously deliver stellar financial results.

A brand that is powered by the Porsche team, driven by our performance culture.

We have a clear strategy for the future of Porsche – which we are consistently enforcing. Our priorities are:

- *Continuous investments in our brand & our ecosystem such as sales concepts or charging hubs and infrastructure*
- *Extension of derivate portfolio & optimisation of our offer strategy – with a clear focus on price & mix*
- *Strengthen our ESG activities while pushing electric & digital transformation*
- *Improving our results with a luxury at scale strategy - focusing on disciplined sales growth at a higher price point*
- *Stringent efficiency management by our Road to 20*

With the launch of the Panamera, we initiated the most extensive product renewal cadence within Porsche's history in the upcoming quarters.

With respect to product, we see the following Porsche core competencies as particularly relevant: quality, unmistakable design, our unique sports car performance, driver experience, and in addition, we focus on fast travelling for our electric vehicles and sustainability as differentiating criteria.

All these points reflected in our Q3-results where we demonstrated our strength at top line and with robust incoming orders.

Our order bank is unchanged on quite a strong level covering production well into 2024:

- *The mix and quality of our orders and order book show that our customers appreciate our exclusive product offerings. The opportunity to personalize our vehicles is utilized to a great extend by our customers - currently we observe the highest option load per vehicle ever and it keeps growing.*
- *As before, the 911 has the largest order book, a strong model mix and the longest waiting time. In uncertain times, we are benefiting from our strong product portfolio and our loyal customer base.*
- *Germany, Europe and the area "Overseas and Emerging Markets" have grown over-proportionally - leading to a balanced and therefore resilient sales mix.*

Before we start let me give you a quick update on our Outlook.

In Q4 we expect improved product availability and continued robust pricing. But we also have to keep monitoring supply chains and parts supply.

Unchanged, our products remain in high demand and our order bank covers our production far into 2024.

As mentioned, we will further strengthen our product offering with our extensive model introductions. However, as with any product launch, we have to pay attention at the industrialization and stability of the supply chain.

For next year we also have to assume that cost inflation will persist. We will share the details of our 2024 outlooks with our full-year disclosure in March 2024.

With this I want to hand over to Michael Kirsch. He is our local CEO for China, Hong Kong and Macao and will now give you an update on our China business."

Welcome to China!

MICHAEL KIRSCH

President & CEO Porsche China,
Porsche Hong Kong and Macau
Porsche China Motors Ltd.



PORSCHE

Over the past decades, China's trajectory has created an economic success story

DEVELOPMENT 2003 TO 2022

~800%
GDP Growth¹

280 MIO
Car ownership¹

561 MIO
5G Mobile Phone User²

560
Billionaires³

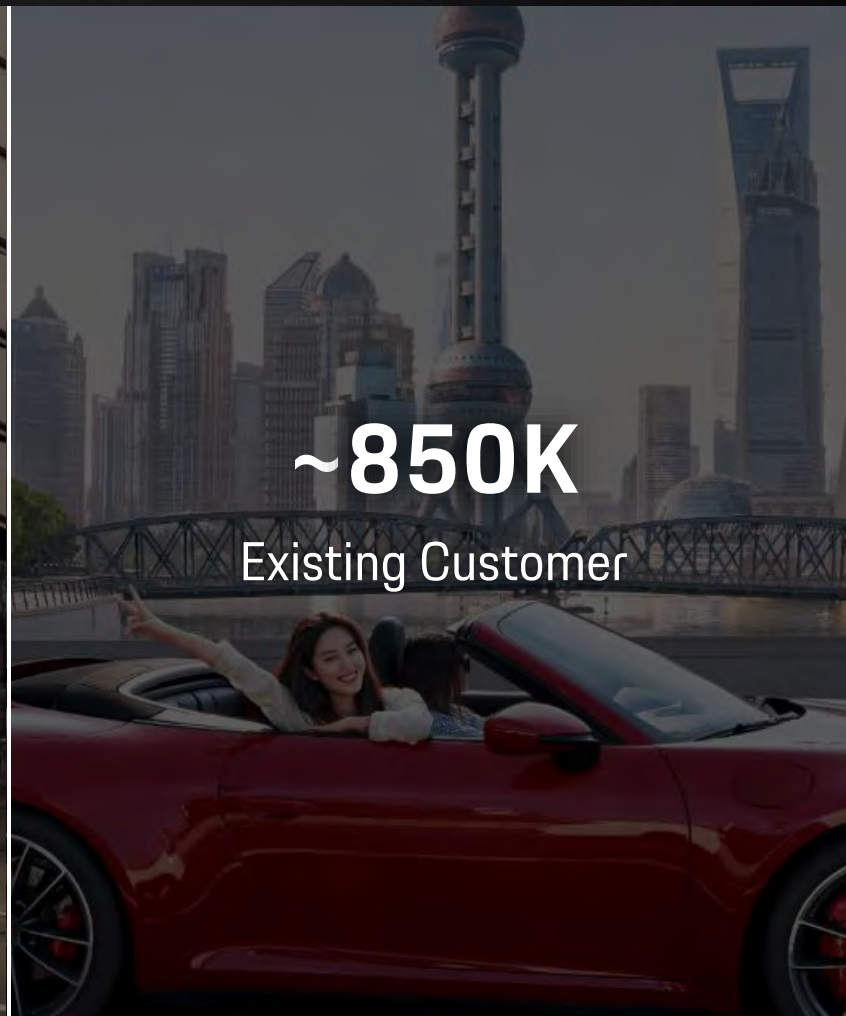
Source: 1) NBS; 2) CCAC (Office of Central Cyberspace Affairs Commission); 3) Forbes

Porsche with a strong foothold in China



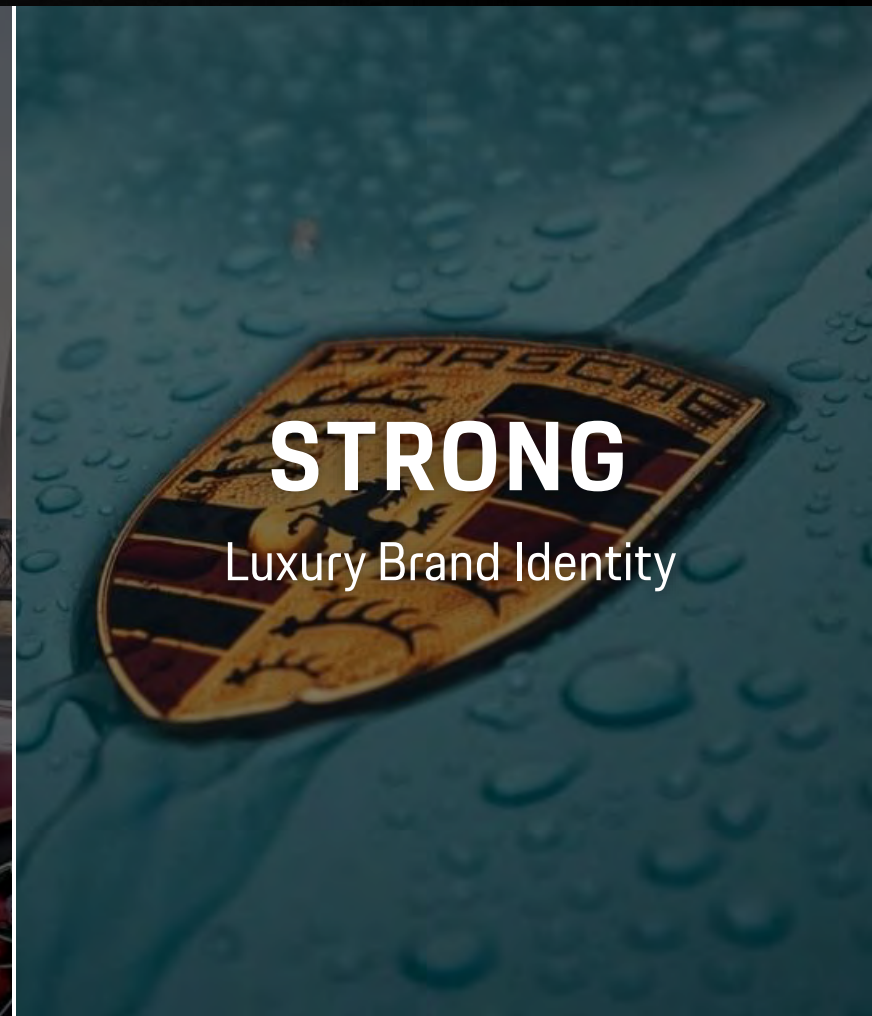
~150

Point of Sales



~850K

Existing Customer



STRONG

Luxury Brand Identity

Chinese Customer Portrait



37 years

Average Age


48 %

Female Ratio

3.3 MRMB

Annual Household
Income





LET'S AGREE:
**2023 has been
an extremely
turbulent year**

Porsche started the first half of the year strong

+21 %

2022 Q1 YTD

VS

2023 Q1 YTD

+8 %

2022 Q2 YTD

VS

2023 Q2 YTD

-12 %

2022 Q3 YTD

VS

2023 Q3 YTD

Source: Porsche AG Press & Analyst Conference Q1 – Q3

While Porsche Sales witnessed a 12 % decline
– the total market grew by 7 %

VDA China Monthly Report - Facts and Figures Aug...

*International passenger car markets mostly up after three quarters
Europe still far below pre-crisis level - China with record month Growth*

New Passenger Car Registrations/Sales

	September 2023	+/- in %	Jan.-Sep. 2023	+/- in %
Europe (EU, EFTA & UK) ¹⁾	1,166,700	11.1	9,684,900	17.0
European Union ¹⁾	861,100	9.2	7,940,700	16.9
W. Europe (EU14, EFTA & UK) ¹⁾	1,065,600	11.4	8,721,700	17.5
New EU Countries (EU13) ¹⁾	101,100	7.7	963,200	12.3
USA* ²⁾	1,332,000	18.5	11,604,100	14.1
China ³⁾	2,463,000	7.1	17,942,000	7.1

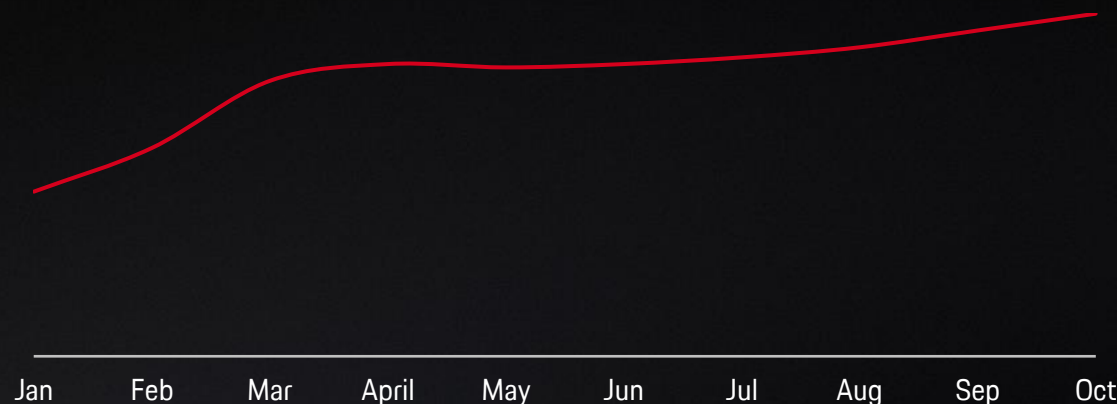
Source: Verein Deutscher Automobil-Industrie; Porsche AG Press & Analyst Conference Q3

Facing the challenge, we have chosen "The Porsche Way" to decouple

Porsche China proactively reduced production to balance demand and supply.



2023 PREMIUM MARKET DISCOUNT DEVELOPMENT





Proactive and decisive
volume adjustment in line
with market development

– The Typical Porsche Way

The Porsche way gives us a lot of praise from customers, dealers and investors

WE HAVE BEEN LAUDED FOR THE PORSCHE WAY BY REDUCING VOLUME



FROM Morgan Stanley Research <resweb@morganstanley.com>

DATE 31. August 2023

China MeiDong Auto Holdings Ltd (1268.HK):

1H23 results briefing takeaways - prudence and efficiency are key

"Tightening supply to stabilize prices: According to management, **luxury brands like Porsche could further tighten supply** in 2H and 2024 to **stabilize prices**, while any rebates would be a bonus. Management hopes that supply adjustments from Porsche in 2H23 and 2024 could bring new car margins back to 2-3Q22 level, though macro uncertainties would remain an overhang"

Morgan Stanley



KEEP SUPPLY AND DEMAND IN BALANCE

**“Never waste
a good crisis.”**

WINSTON LEONARD SPENCER CHURCHILL

Prime Minister, British Politician, Historian





**We see China
as a gym to get
fit for the future**

We have our Fitness Plan with clear principles and strategy

FOCUS

on the most
critical actions

SPEED

in decision &
implementation

VALUE

as common target

Our FSV China strategy and "Porsche for China" is the driving force for future success

Brand Push



Community
Focus



Competitive
Products & Services



Adequate Price
Premium



Balanced Supply
& Demand





LOOKING INTO THE NEXT YEAR, WE WILL HAVE
BOLD AND FUNDAMENTAL GAME CHANGERS

2024: CHANGE GEARS!

01 Recalibration

02 Cost of Franchise

03 Brand Investment

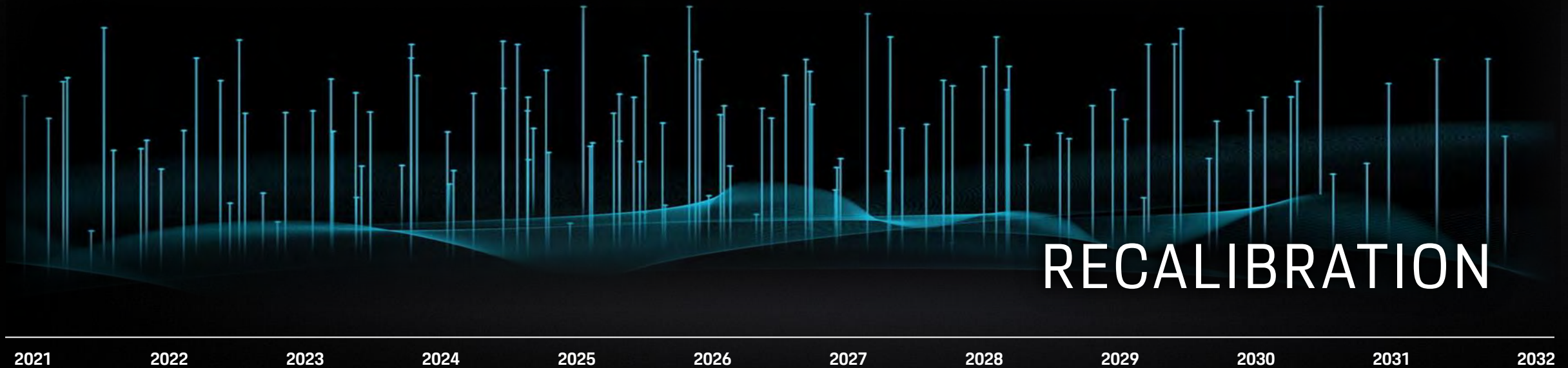
04 Product Offensive

05 Macan Electric Launch

06 Charging Strategy

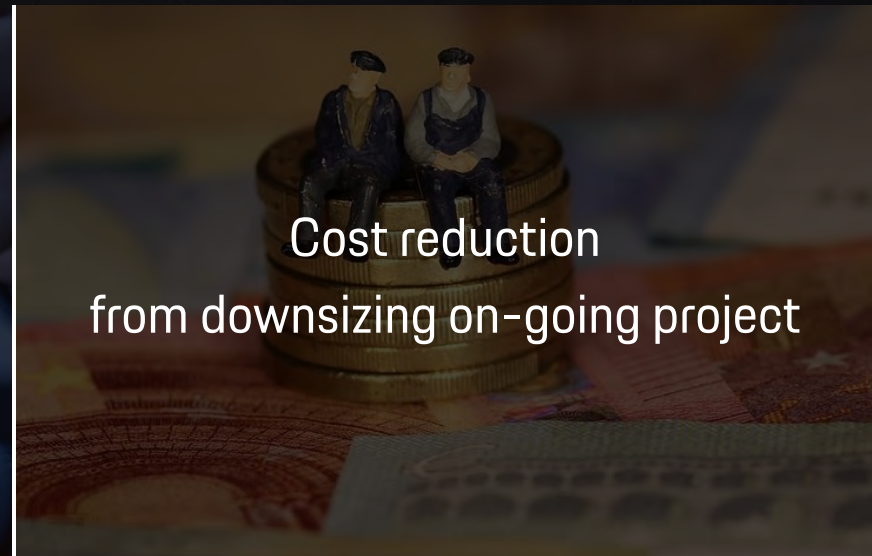
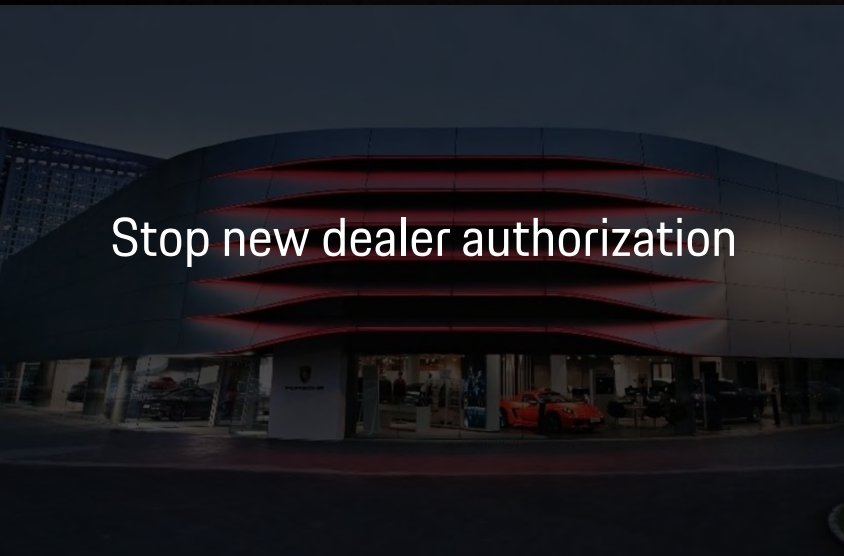
01

We will further recalibrate our China business



02

We have frozen new dealer authorization and will safeguard dealer profitability by optimizing cost of franchise



03

We further invest in brand to set Porsche apart from the competition in China!

01

Brand purpose campaign
"Dream On" airport ads

BRAND VISIBILITY

02

TV/movie product
placement

03

Chinese brand
ambassador

**MACAN ELECTRIC
DESIRABILITY**

04

Luxury
collaboration

05

Cultural event partnership
Aranya Theater Festival

**GEN. Z
ART COMMUNITY**

06

Brand
festival

07

Brand pop-up
BEV Pop-up Stores

**PHYSICAL BRAND
PRESENCE**

08

Community
hub

09

Signature
brand store

**LUXURY
"HOME OF PORSCHE"**

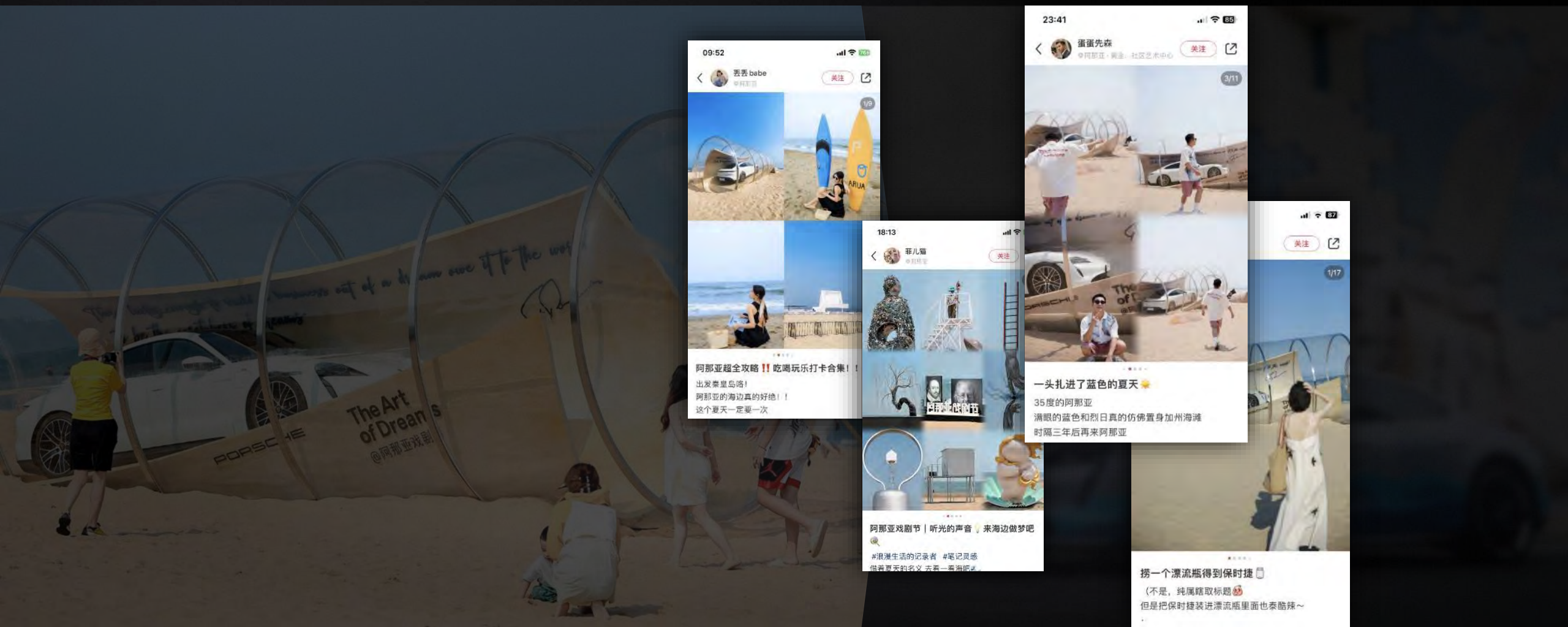
10

Further investment into
Porsche Experience

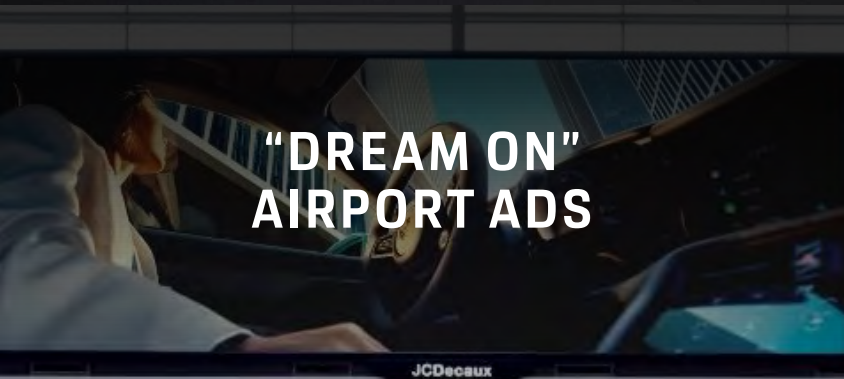
**BRAND
DIFFERENTIATOR**

Aranya Cultural Festival in June successfully addressed young culture seekers

03



Porsche China launched multiple brand push campaigns in 2023



Porsche will add additional customer experience touchpoints

FURTHER INVESTMENT INTO PORSCHE EXPERIENCE CENTRE COMMITTED

We are the brand of choice in China

03

2016: Porsche - 1st Place

2017: Porsche - 1st Place

2018: Porsche - 1st Place

2019: Survey Suspended

2020: Porsche - 1st Place

2021: A Competitor Brand - 1st Place

2022: Survey Suspended

2023: Porsche - 1st Place

Nobody's perfect.

1983 Le Mans results

- 1st Porsche
- 2nd Porsche
- 3rd Porsche
- 4th Porsche
- 5th Porsche
- 6th Porsche
- 7th Porsche
- 8th Porsche
- 9th Sauber/BMW
- 10th Porsche

There's no tougher endurance race than Le Mans. Over 3,000 punishing miles in 24 hours at speeds often in excess of 200 mph. Last year, Porsche took the first five places. This year, the first eight. Next year, who knows? There's always room for improvement. Even at Porsche. PORSCHE · AUDI

We are the best in product and service quality

03

PRODUCT & QUALITY

IQS¹

2020-2023

APEAL²

2017-2023

DEALER SERVICES

SSI³

2022-2023

NCBS⁴

2018-2022

No. 1



Note: 1) IQS (Initial Quality Study); 2) APEAL (Automotive Performance, Execution and Layout); 3) SSI(Sales Satisfaction Index), conducted by J.D.Power ; 4) New Car Buyer Survey conducted by VW group

An aerial photograph of seven Porsche vehicles parked in a row in a parking lot. From left to right, the cars are: a silver SUV, an orange sports car, a light blue convertible, a dark grey sports car, a red SUV, and a green SUV. The parking lot has white grid lines on a grey concrete surface.

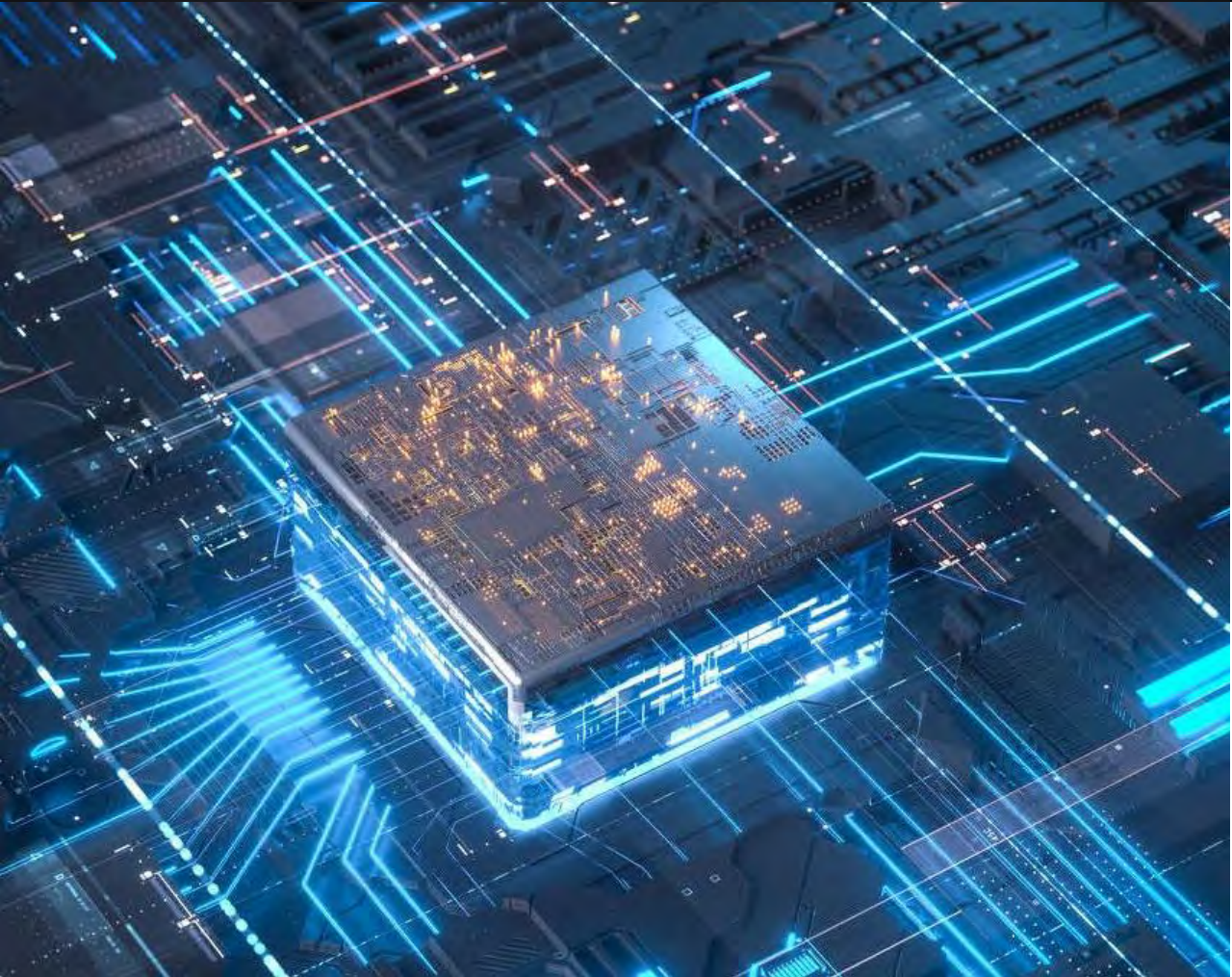
04

Success in 2024 will be supported
by new and exciting products

Today Chinese customer requirements go beyond PS

04

– IT IS ALL ABOUT DIGITAL EXPERIENCE



By the end of the year, we will launch our first in-China for China developed infotainment system

04




OPTION

The all new electric Macan

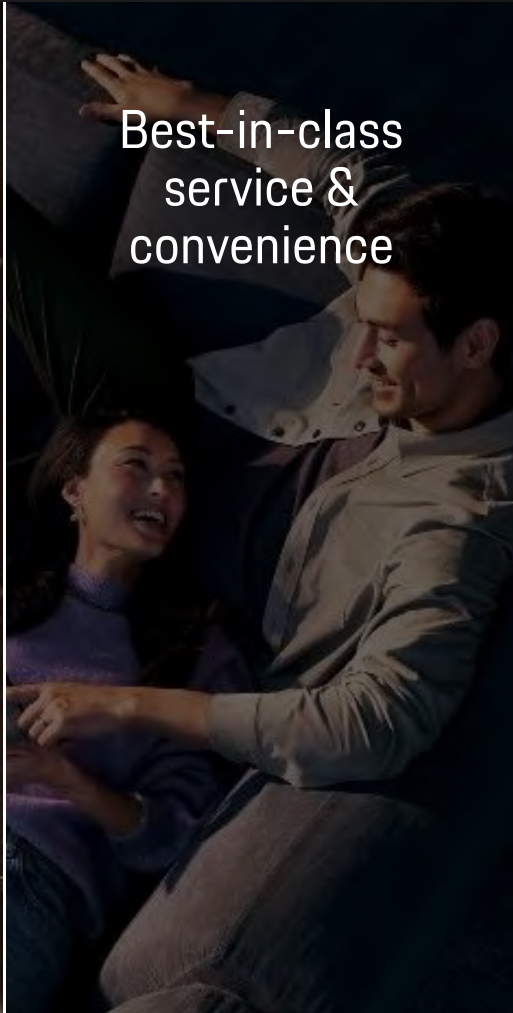
05

With the Launch of the Macan electric, we will redefine luxury in the Chinese BEV market

We have a clear launch plan for the Macan electric to make it incomparable



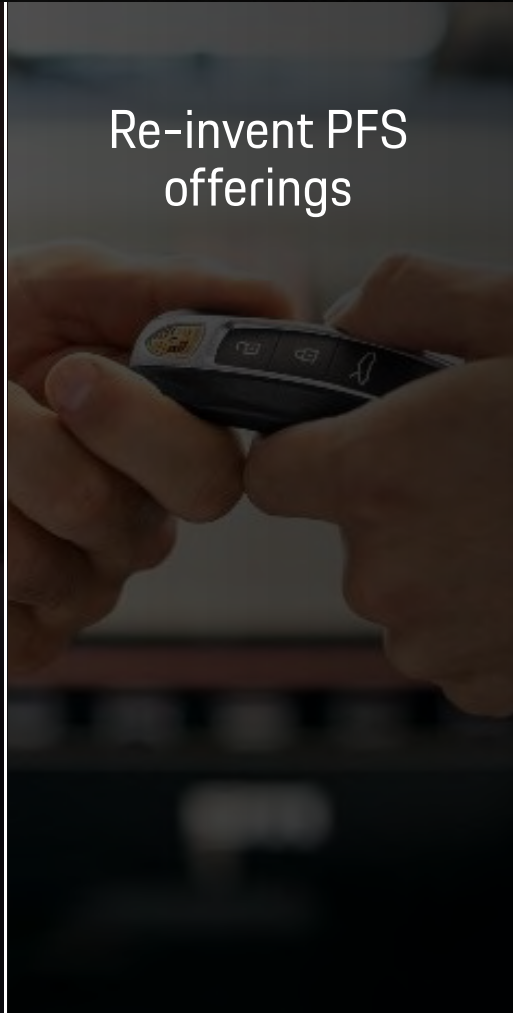
Launch activation




Best-in-class service & convenience



Igniting community



Re-invent PFS offerings



Perception of scarcity

Our Charging Strategy paves the way into an even stronger BEV adoption in coming years

06

>11,000

Private Charging Installations¹

>310

Dealer Charging Piles²

>320

Porsche Exclusive Charging Piles²

~1,000,000 KWH

Charged via Porsche Infrastructure

Note: YTD Oct. 2023. 1) AC wallbox; 2) DC stations with power up to 480 Kw, piles including HPC and DC local

Dealer Partners aren't just business associates

THEY ARE CO-AUTHORS IN PORSCHE'S LUXURY JOURNEY



Brand & Balanced Supply and Demand

PARTNER FEEDBACK MEIDONG



Triple WIN WIN WIN

PARTNER FEEDBACK PORSCHE HOLDING

CUSTOMER

Brand Value



PORSCHE

Resilient Business Model



CAPITAL MARKET

Long Term Growth Potentials



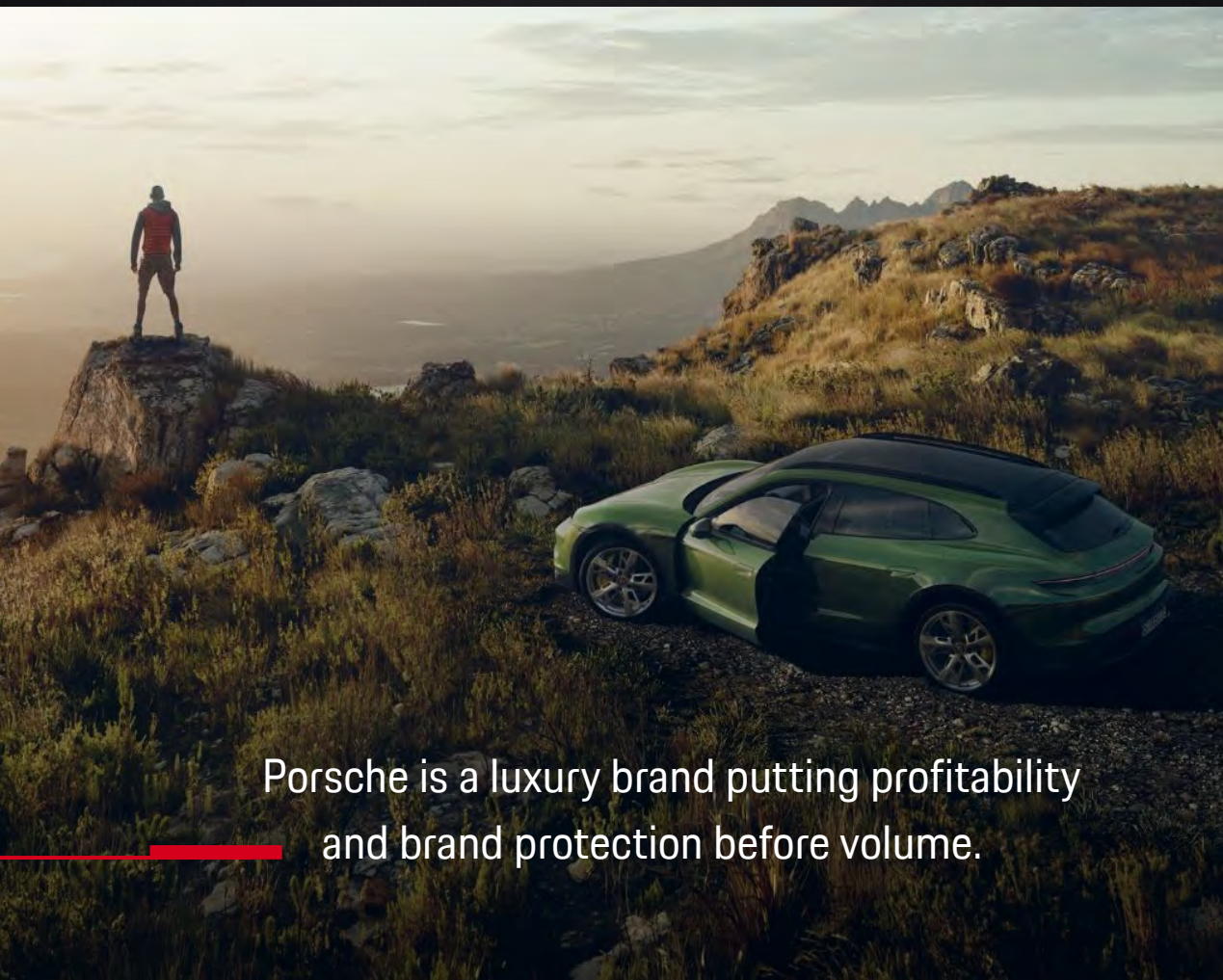
Sustainability

PARTNER FEEDBACK JEBSEN



China is a market with more chances than risks

WE WILL CAREFULLY NAVIGATE THE MARKET



Porsche is a luxury brand putting profitability and brand protection before volume.



E-SATELLITE >>

In China – for China!

OLIVER SEIFERT

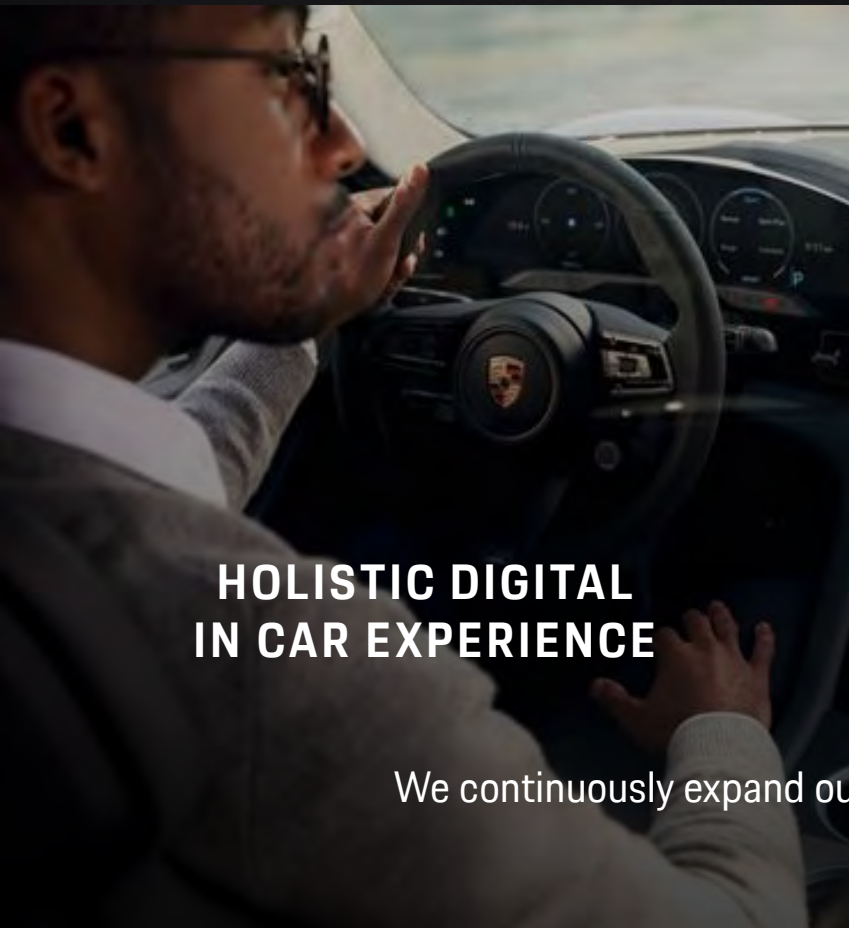
Vice President Porsche R&D Infotainment & Connect
Dr. Ing. h.c. F. Porsche AG



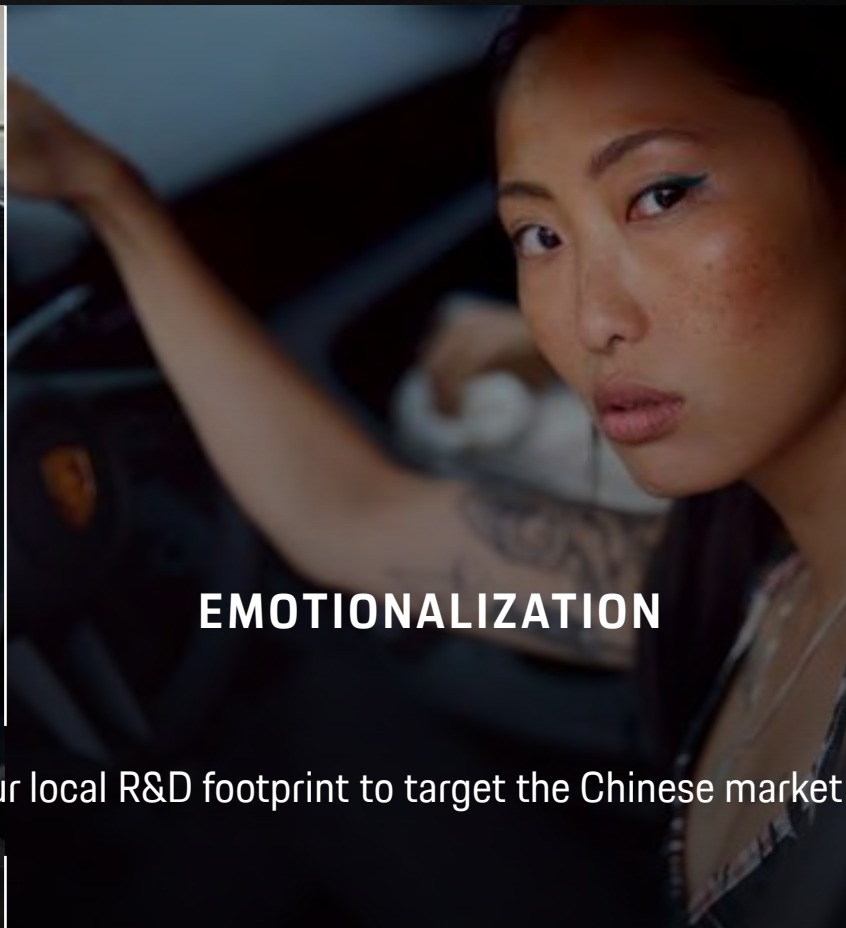
PORSCHE

Porsche established the local R&D Satellite in 2022

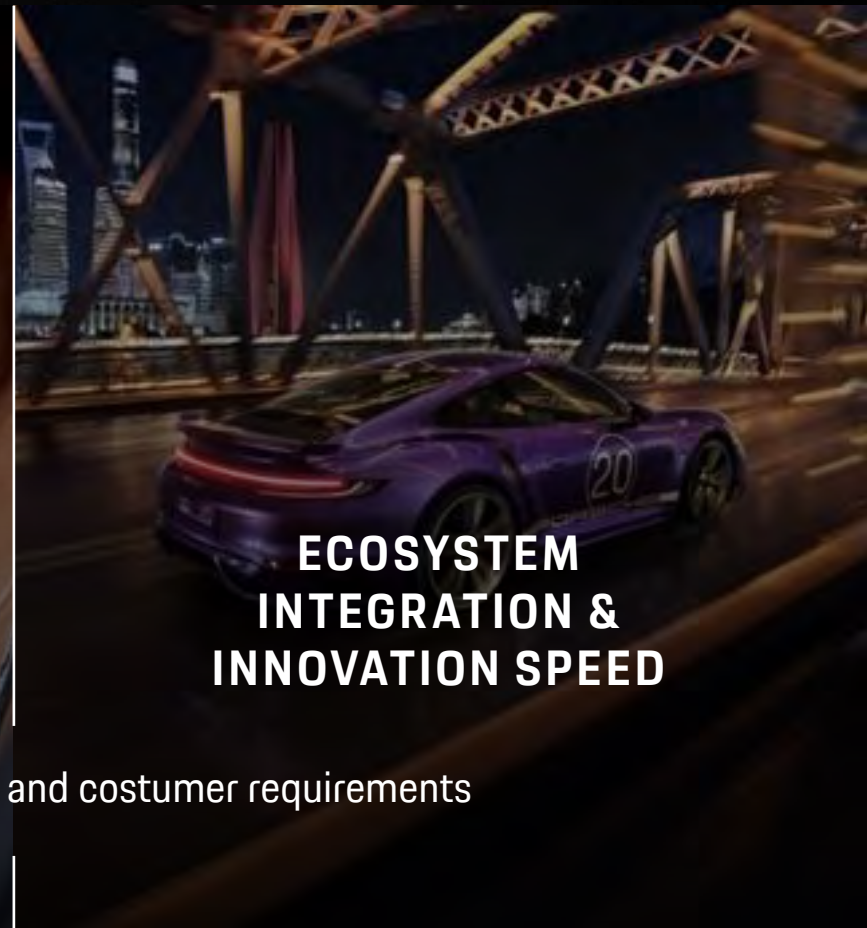
TO KEEP PACE WITH THE HIGH DEVELOPMENT SPEED AND
PIONEERING INNOVATION OF THE CHINESE AUTOMOTIVE MARKET



**HOLISTIC DIGITAL
IN CAR EXPERIENCE**



EMOTIONALIZATION

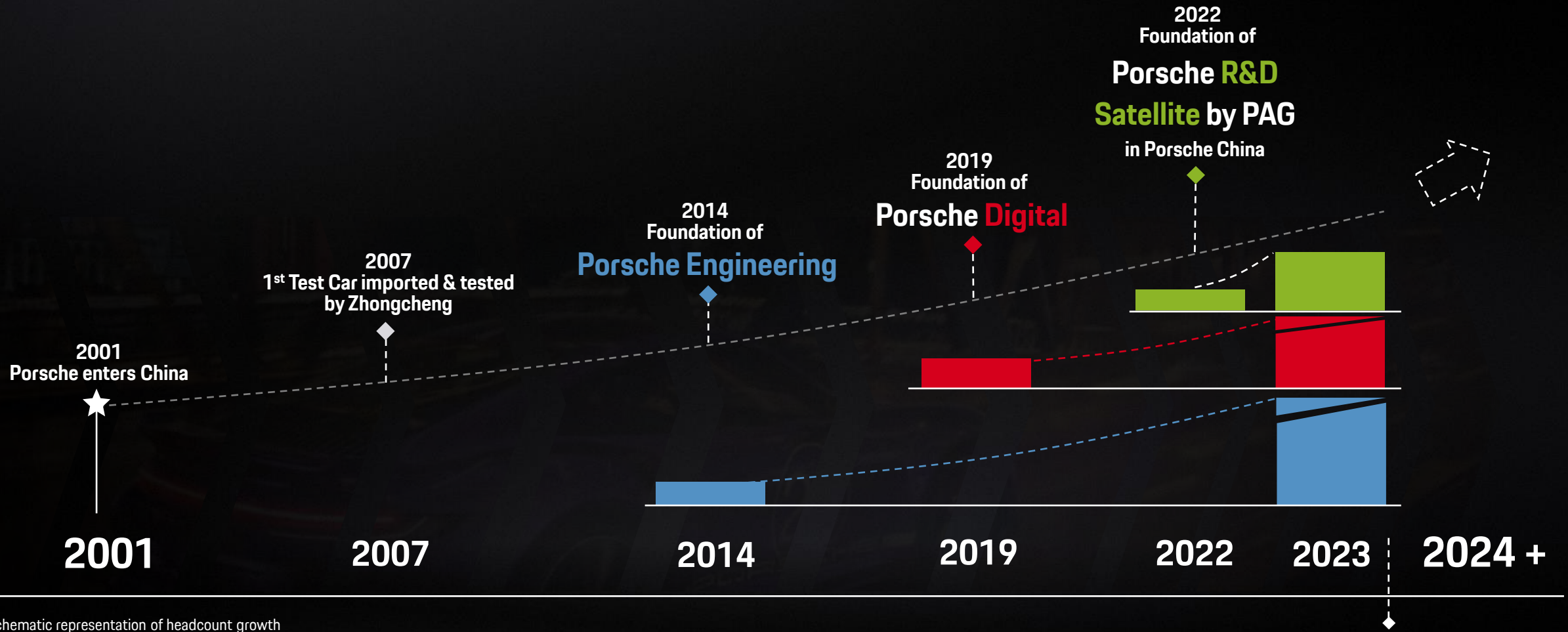


**ECOSYSTEM
INTEGRATION &
INNOVATION SPEED**

We continuously expand our local R&D footprint to target the Chinese market and customer requirements

First imported test car in 2007

PORSCHE HAS BUILT UP SUSTAINABLY THE R&D COMPETENCE IN CHINA TO TACKLE THE GROWING RESPONSIBILITY OF LOCAL DEVELOPMENT



Schematic representation of headcount growth

Porsche Expands Reach with Today's R&D Satellite in China

STRENGTHENING THE CONNECTION TO THE DEVELOPMENT CENTER IN GERMANY

Porsche R&D Satellite

INFOTAINMENT
& CONNECT

HV- /LV-
BATTERY

CHARGING

ADAS

WHOLE VEHICLE
VALIDATION



Monitoring, Analysis & Tech-Scouting

China Specific requirements from market, technology, industry & legal



Development & Project Management

Steering on-site development activities together with 3rd parties



Test Management

Development of China test strategy with optimized synergy



Validation & Verification

Strengthening of validations under local conditions & incubate local competence

With Focus on Products and Services specifically designed for China

LOCAL TECH- & INNOVATION SCOUTING



LOCAL INFOTAINMENT & CONNECT SOLUTIONS



STATE-OF-THE-ART BATTERY TECHNOLOGY



ADVANCED DRIVING ASSISTANCE SYSTEMS

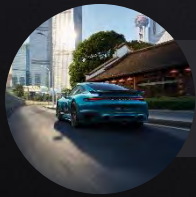


LOCAL VALIDATION AND VERIFICATION



OUR VISION:
In China - With Chinese Partners – For China

Strengthening the Porsche R&D in China while adding Sajjad Khan as new board member for our Car-IT: We are on the right track



CHINA R&D SATELLITE



Porsche R&D Satellite
Porsche Engineering
Porsche Digital

Porsche One R&D Team for
China specific development



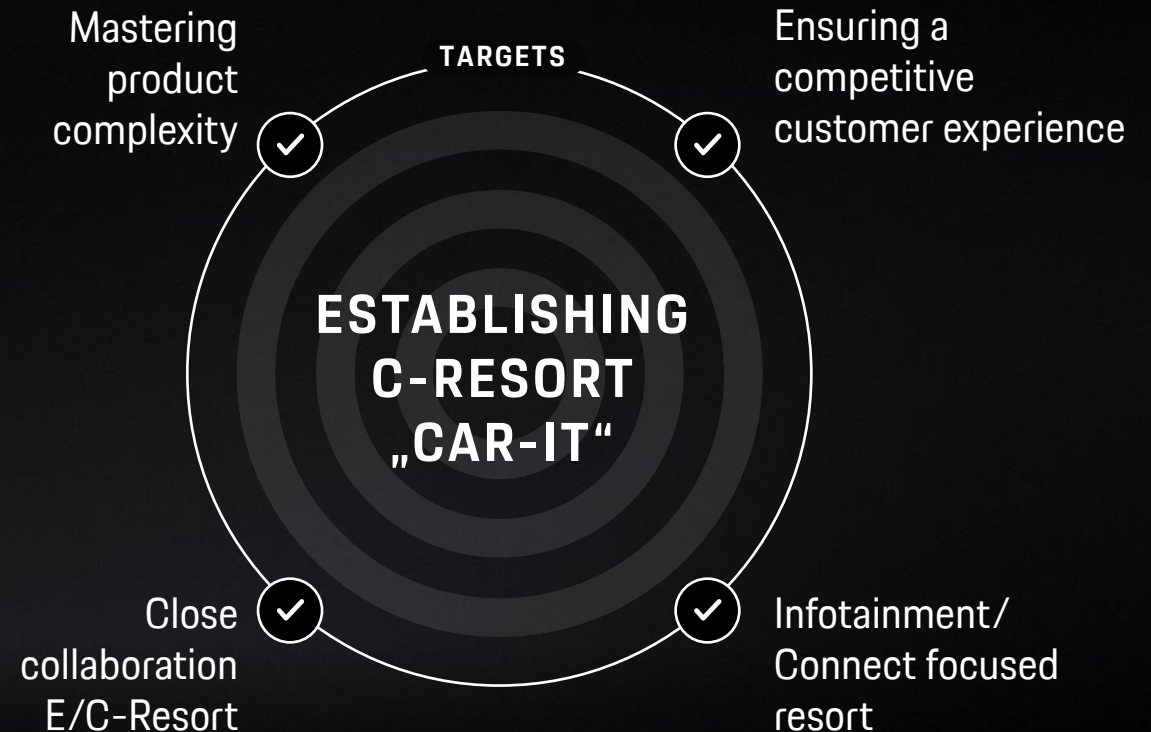
Growth of Porsche R&D Satellite &
Close collaboration within VGC



China Porsche One R&D location



SAJJAD KHAN



#IMPULSESFROMOVERSEAS

Growth Region V5

MATTHIAS BECKER

Vice President Region Overseas & Emerging Markets
Dr. Ing. h.c. F. Porsche AG

PORSCHE



MATTHIAS BECKER

PORSCHE

Porsche – Vice President Sales (Since 2015)
Region Overseas & Emerging Markets



More than 25 years in Volkswagen Group
Germany, UK, Czech Republic, Mexico, China

Porsche Sales Regions



Growth Region V5

MARKET LOCATIONS

~ 8 billion
Global population

34%

66%



■ V1, V2, V3, V4 ■ V5

Growth Region V5

REGIONAL DIVERSITY

70+ Markets,
legal & tax

3 Regional
offices

3.6 Mth
Complex logistic chains

24 Time
zones

5 Subsidiaries

40+ Languages

500+ Employees

70+ Product &
pricing groups

10.000+
Employees @ partners

■ V1, V2, V3, V4 ■ V5

Growth Region V5

MARKETING IMPRESSIONS 2023





IMPULSES FROM
Overseas



V5 =
Growth Region

Growth Region V5

RETAIL SALES 2023 (PER SEPTEMBER)

RETAIL SALES
2023



September (YTD)



242.722

EUROPE



51.742 24.814
21% 10%

NORTH AMERICA



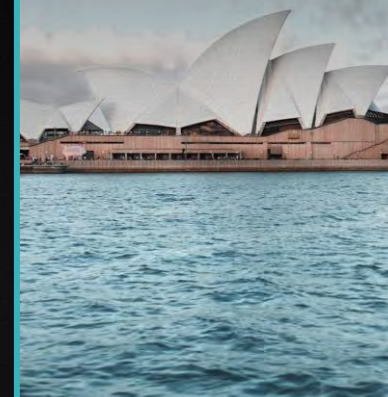
64.487
27%

CHINA



60.748
25%

OVERSEAS



40.931
17%

Growth Region V5

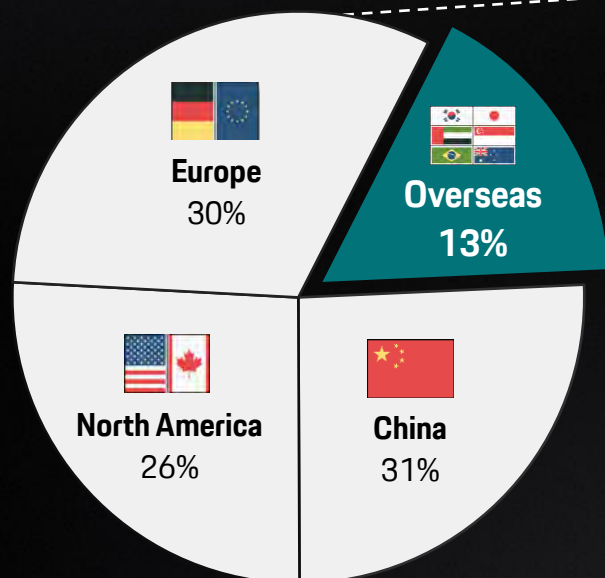
GLOBAL SHARE 2023 (PER SEPTEMBER)



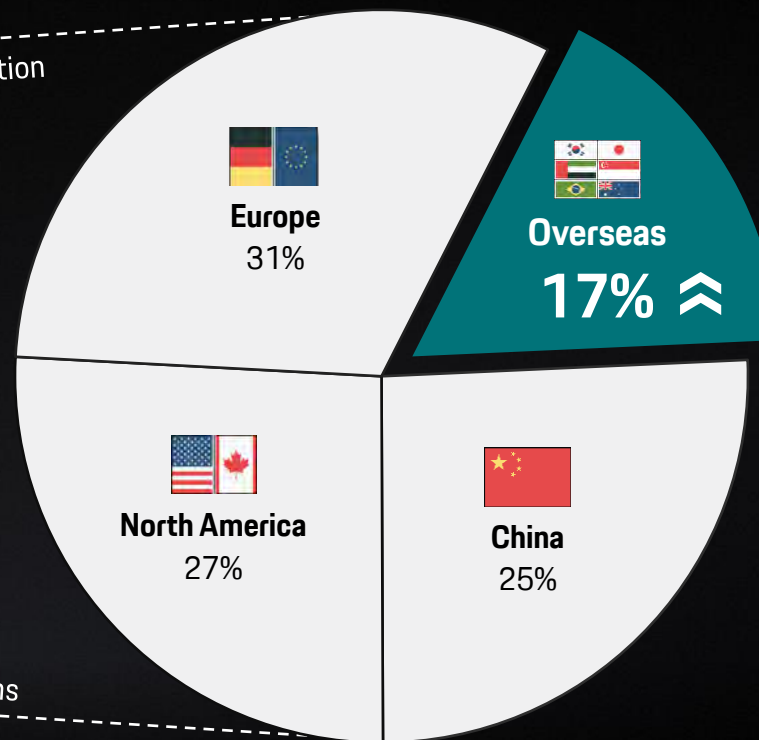
SALES PER REGION 2018 (CALENDAR YEAR)



SALES PER REGION 2023 (YTD SEPTEMBER)



Increasing V5 volume & regional distribution




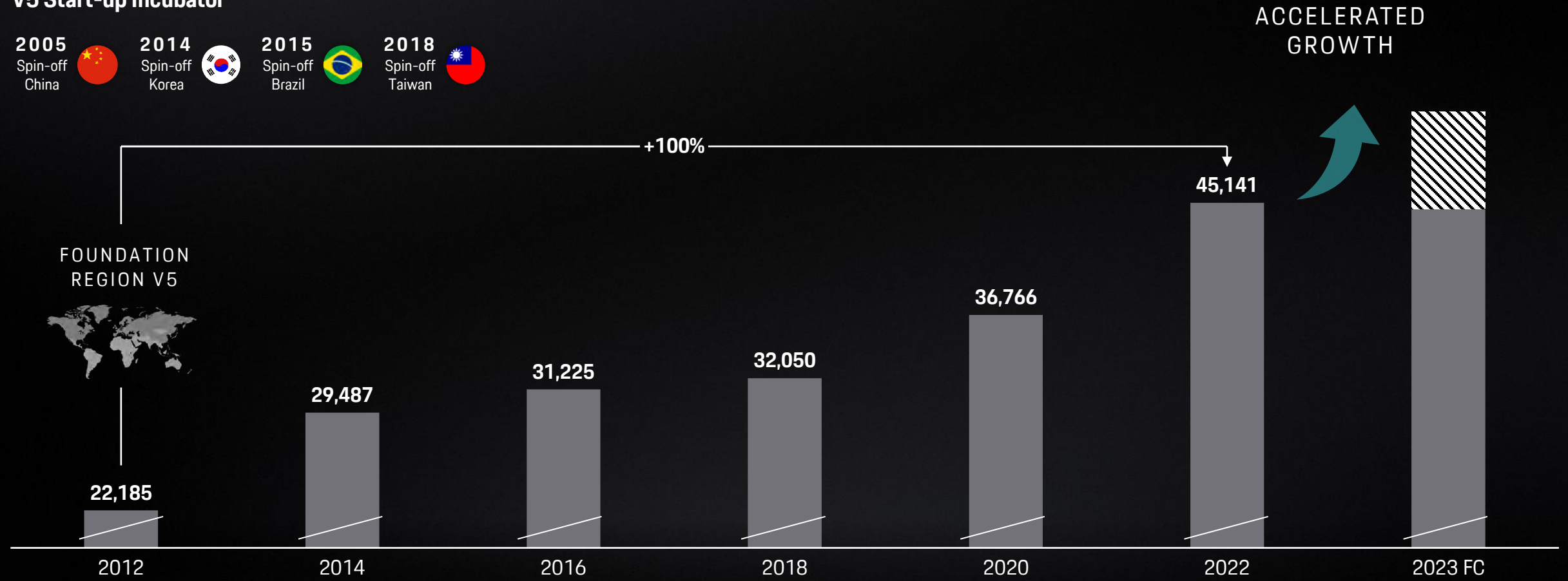
Risk diversification across all sales regions

Growth Region V5

RETAIL SALES DEVELOPMENT 2012-2023

V5 Start-up Incubator

- 2005 Spin-off China 
- 2014 Spin-off Korea 
- 2015 Spin-off Brazil 
- 2018 Spin-off Taiwan 





VISION » STRATEGY » IMPLEMENTATION

Porsche Strategy 2030

Mission

"In the beginning I looked around and could not find the car I dreamed of. So I decided to build it myself."



Ferry Porsche

Vision

"The brand for those who follow their dreams"



CORPORATE STRATEGY

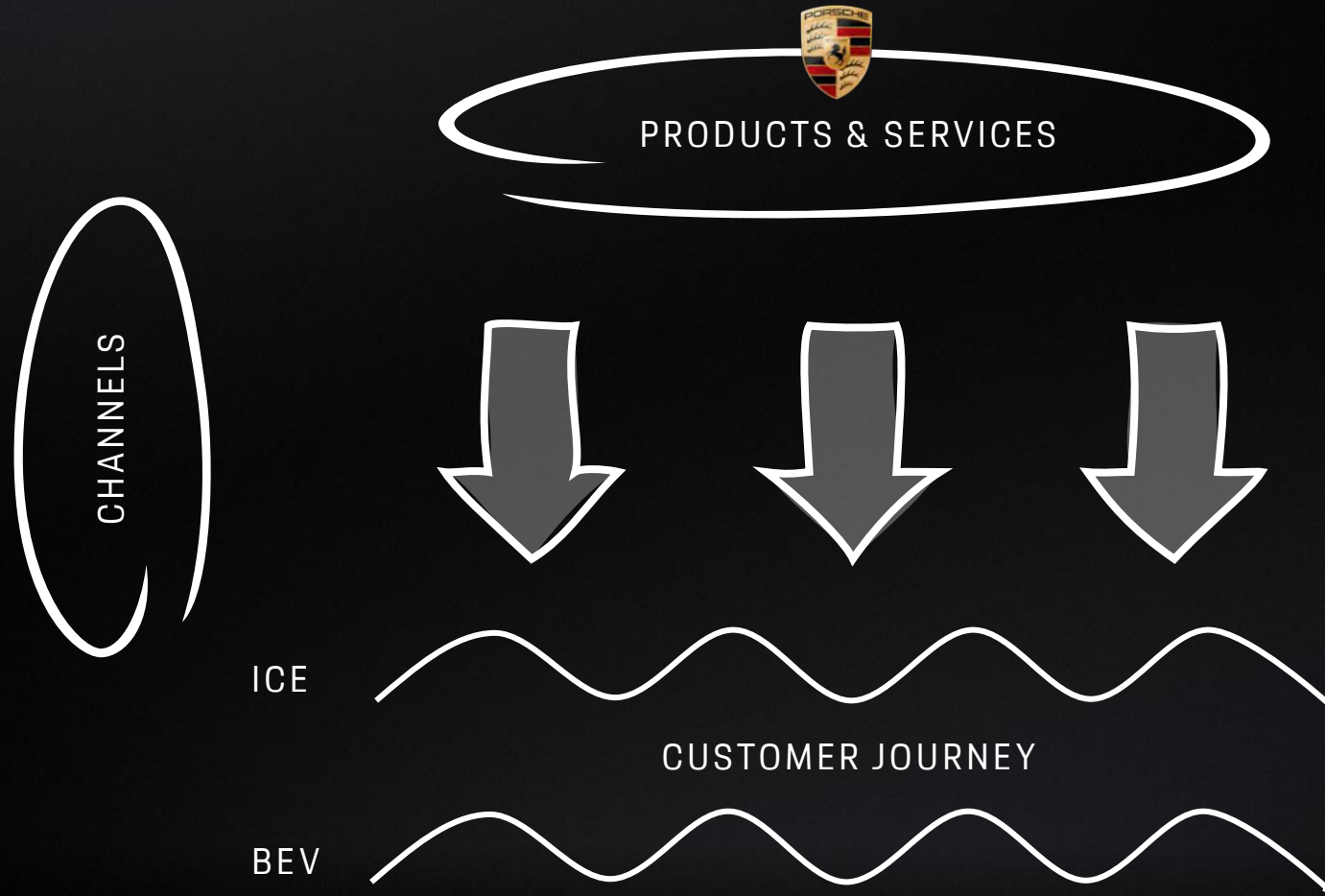
Mission | Vision | Targets



PROFITABILITY PROGRAM 2030

Growth Region V5

BUSINESS MODEL



Growth Region V5

LUXURY BRAND EXPERIENCE

"THE BRAND FOR THOSE
WHO FOLLOW THEIR DREAMS"

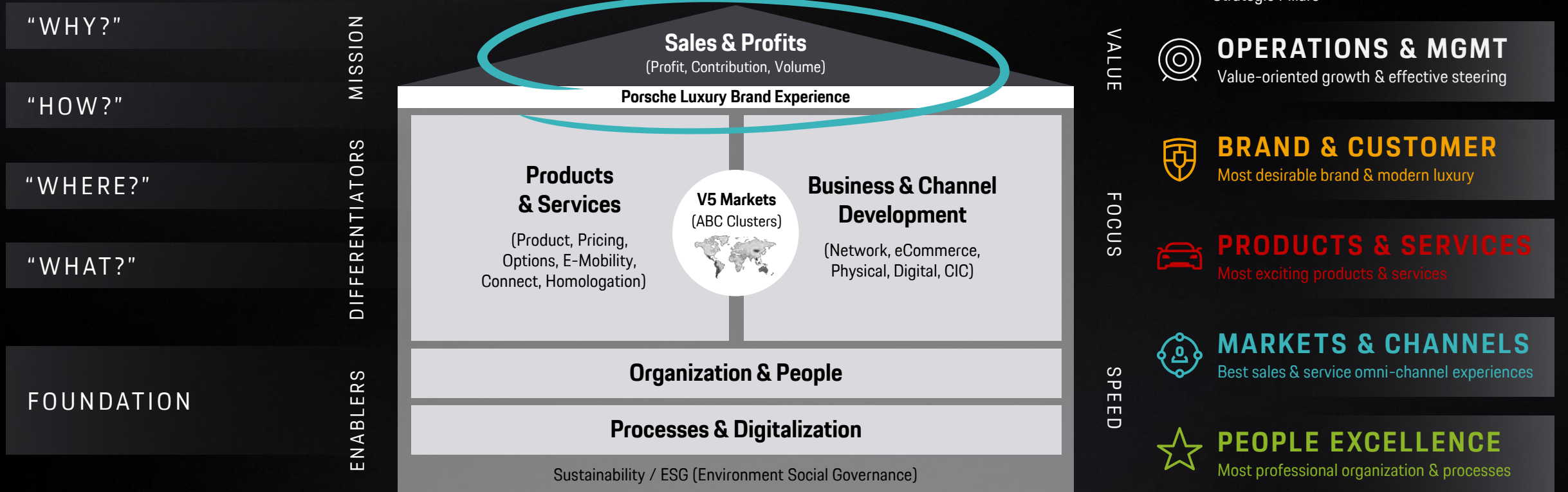


"IT'S NOT WHAT YOU BUY,
IT'S WHAT YOU BUY INTO"

"PORSCHE IS A PROMISE THAT IS BOUGHT ONLY
BY 0,004%, BUT ASPIRED BY MANY MORE"

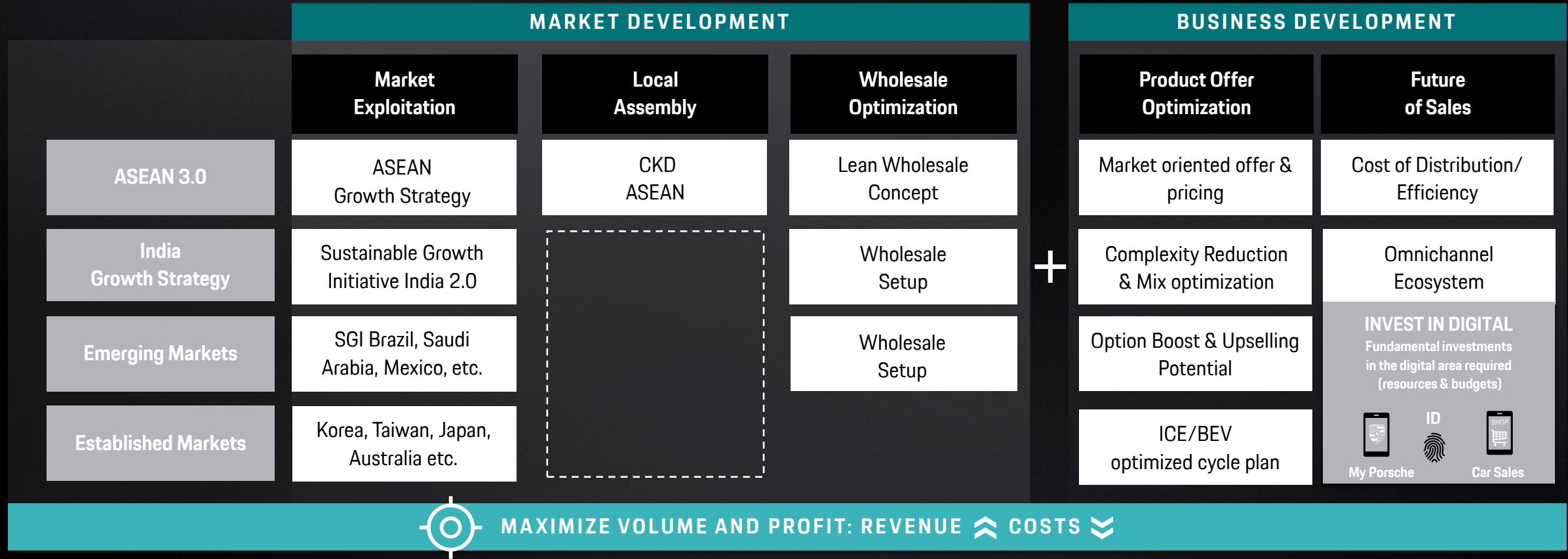
Growth Region V5

STRATEGY HOUSE



Growth Region V5

STRATEGIC PROJECT MODULES



- ✓ **S2030 FIT**
- ✓ **BRAND FIT**
- ✓ **SYNERGIES**
- ✓ **ROAD TO 20**
- ✓ **CAPITAL MARKET**

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MARKET STRATEGIES

„Focus“

„Speed“

PORSCHE STRATEGY

Mission
In the beginning I looked around and could not find the car I dreamed of. So I decided to build it myself.

Vision
The brand for those who follow their dreams.

Ferry Porsche

CORPORATE STRATEGY
Various Business Regions

PRIORITARIETY PROGRAM 2030



V5 STRATEGY

Sales & Profits
(Price, Contribution, Volume)
Porsche Luxury Brand Experience

Products & Services
(Product, Pricing, Options, E-Mobility, Connect, Homologation)

V5 Markets
(ABC Clusters)

Business & Channel Development
(Network, e-Commerce, Physical, Digital, DC)

Organization & People

Processes & Digitalization

Strategic Pillars

- OPERATIONS & MGMT
Value: retained growth & effective steering
- BRAND & CUSTOMER
Most desirable brand & customer loyalty
- PRODUCTS & SERVICES
Most desirable product & service quality
- MARKETS & CHANNELS
Best sales & service centers, channel engagements
- PEOPLE EXCELLENCE
Most successful organization & processes

“The brand for those who follow their dreams”



MARKET STRATEGIES

In the beginning I looked around and could not find the car I dreamed of. So I decided to build it myself.

Ferry Porsche

„Value“

Growth Region V5

SHORT JOURNEY THROUGH SELECTED FOCUS MARKETS

SAUDI ARABIA
PME

SOUTH KOREA
PKO

ASEAN
PAP

INDIA
PME

Growth Region V5

KINGDOM OF SAUDI ARABIA

THE SAUDI
RENAISSANCE:
shift beyond oil and
opening up the country

2022

2030

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SAUDI VISION 2030

NEOM PROJECT

Futuristic region with more than \$ 500 billion investments

THE OXAGON

World's largest floating industrial complex to propel economic growth

THE LINE

170 km linear smart city with housing for 9 million people



GDP
1 T\$ (50% of GCC)



POPULATION
36 M



MILLIONAIRES
354 K



MEDIAN AGE
32 Y



FEMALE DRIVERS
12%



LUXURY CAR SEGMENT
16 K

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GROWTH MARKET INDIA

FAST-GROWING ECONOMY

India will become the world's 3rd largest economy overtaking Germany

WEALTH POPULATION

Home to 3rd largest number of billionaires in the world

BHARATMALA PROJECT

Infrastructure initiative aimed to improve road connectivity

YOUTHFUL

More than half of the population is under 30



GDP
3.7 T\$ (+10 % CAGR)



POPULATION
1.35 B



MILLIONAIRES
> 800 K



MEDIAN AGE
28 Y



LUXURY CAR SEGMENT
24 K (+11 % CAGR)

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LUXURY MARKET SOUTH KOREA

DIGITAL AFFINITY

One of the most advanced digital ecosystems in the world

TECHNOLOGY DRIVEN

Home to innovative global tech giants like Samsung and LG

R&D EXPENDITURE

Korea spends 4 times more of its GDP on R&D than Germany



POPULATION
52 M



5TH BIGGEST
Porsche market globally



CHARGING INFRASTRUCTURE
225 K chargers (6x until 2030)



E-MOBILITY SEGMENT
> 25 %

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LUXURY MARKET SOUTH KOREA



DIOR IN GANGNAM

High expectations and world-class execution



HERMES IN GANGNAM

Korean desires for exhibiting social standing



LOUIS VUITTON IN GANGNAM

Gangnam, Seoul: renowned as a symbol of affluence & luxury



MILLIONAIRES
1.3M



HIGHEST GLOBAL SPENDING PER CAPITA ON LUXURY GOODS
325 \$ (2. USA 280\$, 3. China 50\$)



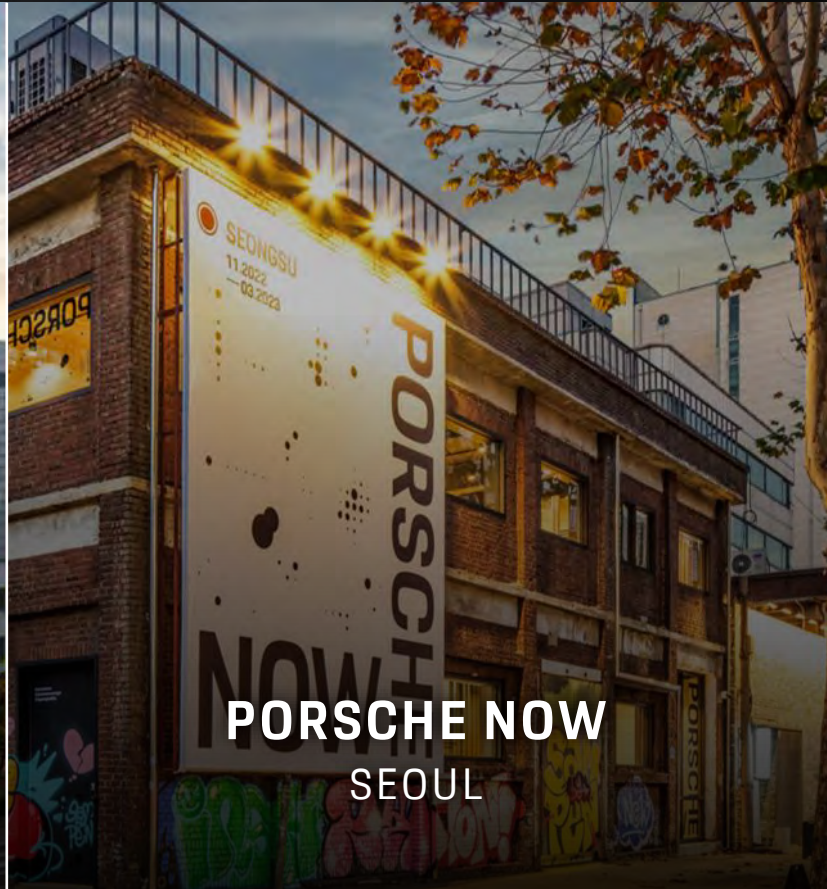
LUXURY CAR SEGMENT
196K

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LUXURY MARKET SOUTH KOREA



PORSCHE STUDIO
SONGPA



PORSCHE NOW
SEOUL



PORSCHE CENTRE
SEONGSU

Growth Region V5

LUXURY MARKET SOUTH KOREA

PORSCHE NOW
SEOUL



INNOVATIVE RETAIL FORMATS



OMNI-CHANNEL ECOSYSTEM



Growth Region V5

FOCUS ON ASEAN

~ 8 billion
Global population

34 %

66 %

- Germany
- North America and Canada
- China
- Europe incl. Russia
- Overseas and Emerging Markets



> 5 BILLION
POPULATION
IN ASIA

Source: V53/PAP, 11/2022

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FOCUS ON ASEAN

WORLD'S LARGEST ECONOMIES	2000	2015	2030
1	USA	USA	China
2		China	USA
3	Germany		ASEAN
4		Germany	India
5			
6	China	ASEAN	Germany
7			
8		India	
9			
10			
11	ASEAN		
12			



POPULATION
> 650 M today



ECONOMY
**3rd largest Region
by 2030**



AVERAGE AGE
Ø 28.9 years

Source: K/FTU, according to IHS Markit (2018): ASEAN – Makroökonomie: Die 12 größten Volkswirtschaften

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FOCUS ON ASEAN



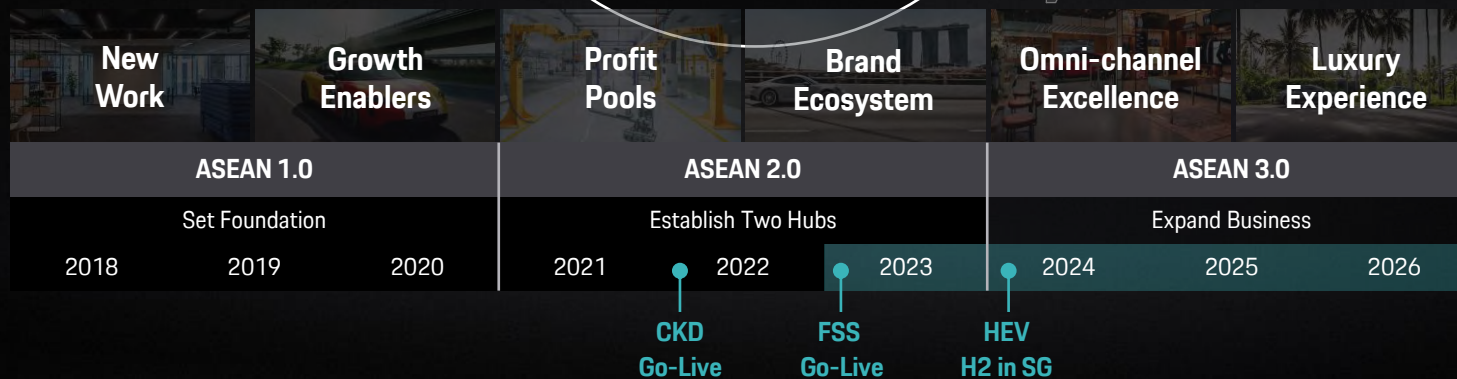
MALAYSIA

Pilot | Local Assembly



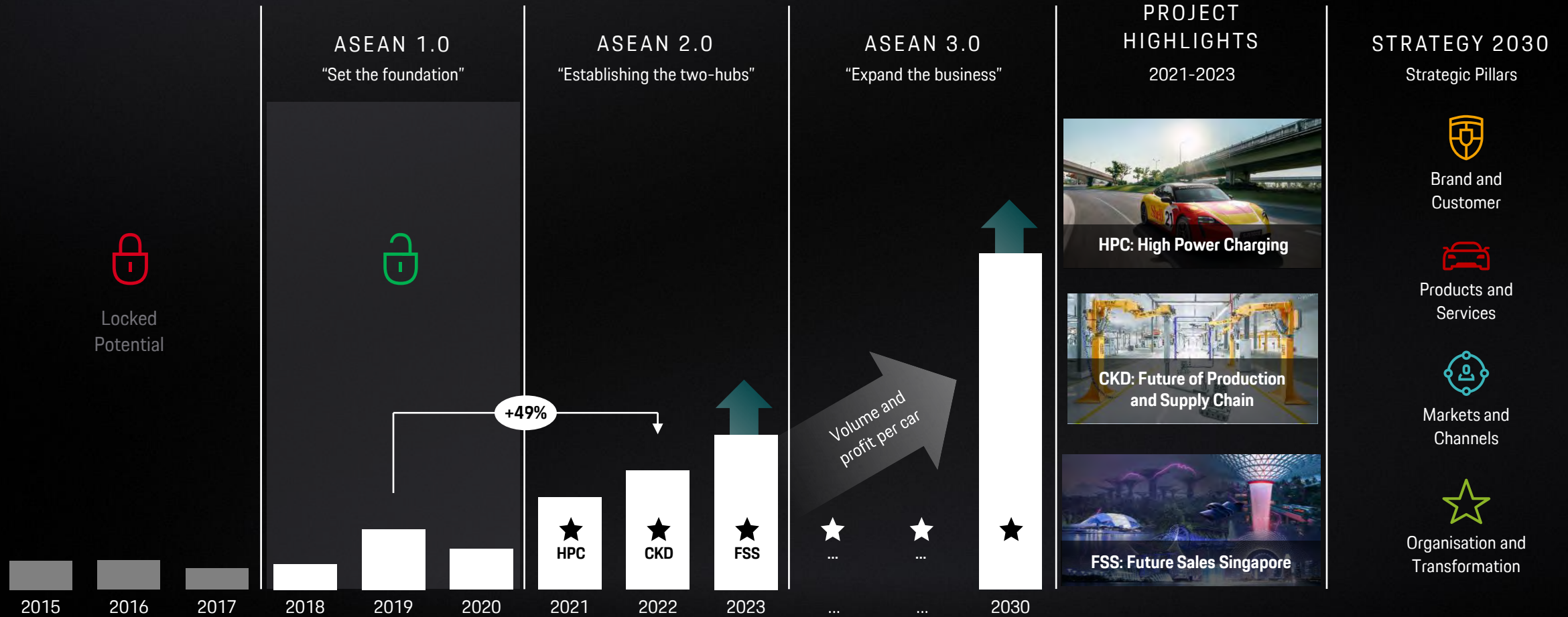
SINGAPORE

Future Sales | Pilot



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FOCUS ON ASEAN



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SINGAPORE – CITY OF THE FUTURE

**TECH & INNOVATION
HUB**

**THE GATEWAY TO
SOUTH-EAST ASIA**

**IDEAL TESTBED FOR
THE 'FUTURE OF SALES'**

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SINGAPORE X PORSCHE STRATEGY 2030

**THE GATEWAY
TO ASIA**

**GAME OF
CITIES**

**EQUILIBRIUM
RACE**

**DIGITAL
FRONTIERS**

**GLOBAL
COMMUNITY
& CLUBS**

**GREEN PLAN
2030**


**TECH/INNO
LIGHTHOUSE**

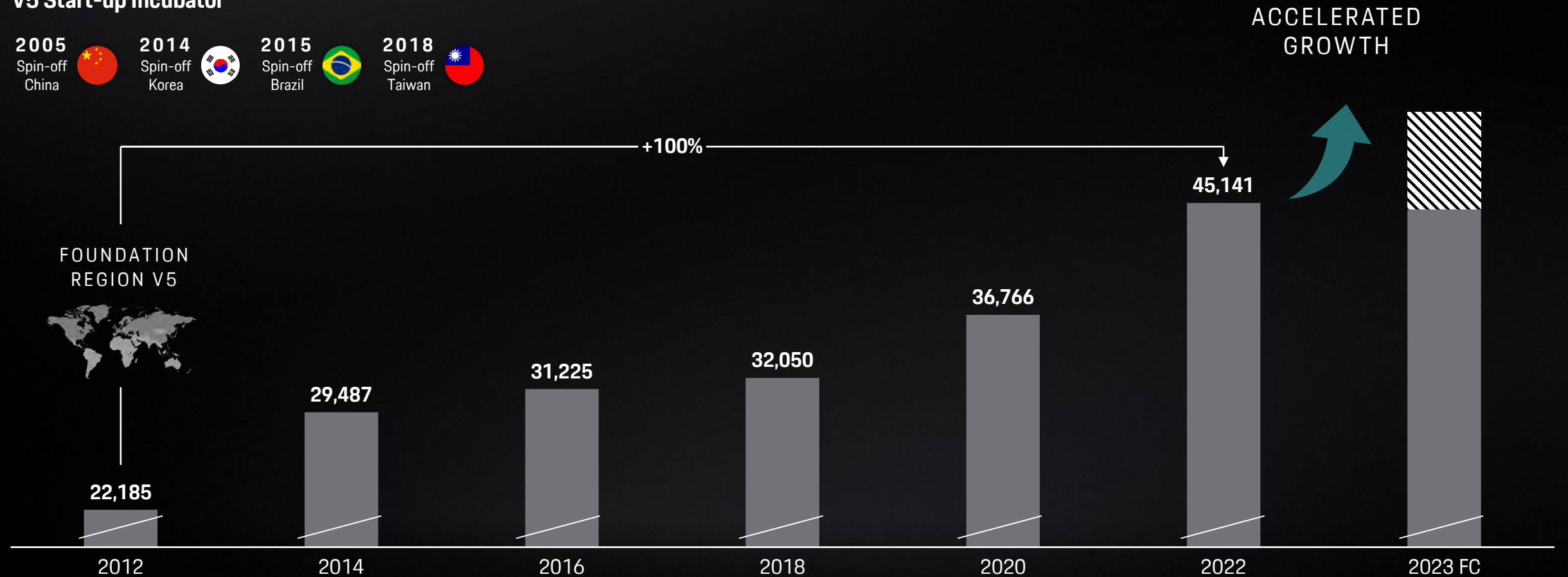
The Art
of Dreams
Singapore

Growth Region V5

RETAIL SALES DEVELOPMENT 2012-2023

V5 Start-up Incubator

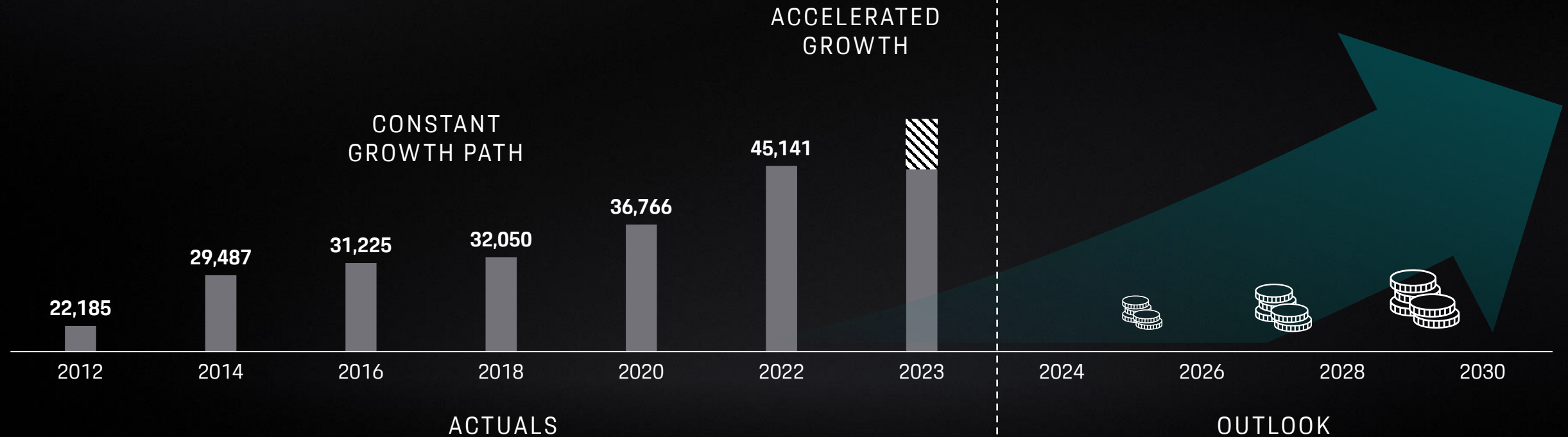
- 2005 Spin-off China 
- 2014 Spin-off Korea 
- 2015 Spin-off Brazil 
- 2018 Spin-off Taiwan 



Growth Region V5

MAXIMIZE LEVERAGE OF PROFIT POTENTIALS

V5 Start-up Incubator



Growth Region V5

KEY TAKE AWAYS



VALUE-ORIENTED & SUSTAINABLE GROWTH STRATEGY

- » V5 = growth markets with strong performance and high future potentials
- » Clear Vision 2030, focused market strategy and structured implementation plan
- » Main objective: Maximizing leverage of profit potentials > volume growth ambitions



BRAND & CUSTOMER

- » Most desirable brand & modern luxury



PRODUCTS & SERVICES

- » Most exciting products & services



MARKETS & CHANNELS

- » Best sales & service omni-channel experiences



PEOPLE EXCELLENCE

- » Most professional organization & processes



The Brand

FOR THOSE WHO
follow their dreams



**THANK YOU
for your attention!**

#IMPULSESFROMOVERSEAS

WELCOME TO THE FACTORY OF YOUR DREAMS

The most personal car.

ALEXANDER FABIG

Individualization & Classic,
Dr. Ing. h.c. f. Porsche AG



PORSCHE



Individualization and Classic

IS RESPONSIBLE FOR 4 PORSCHE SUB BRANDS

PORSCHE CLASSIC

- Responsible for all vehicles from 10 years after EOP
- 80.000+ Classic parts available
- 85+ Porsche Classic Partner worldwide
- Factory restoration in Germany and US



PORSCHE EXCLUSIVE MANUFAKTUR

- 1.000+ options ex-works for all model lines
- Responsible for all Exclusive Manufaktur vehicles (Trim lines, Editions, Limited Series)
- Realization of individual customer requests („Sonderwunsch“)

PORSCHE TEQUIPMENT

- Genuine accessories and retrofitting options for all model lines
- 400+ Tequipment corners worldwide
- New product portfolio: Performance Parts by Manthey








PORSCHE WERKSABHOLUNG

- ~2.000 deliveries for national & international customers
- Located in “Werk 4” due to refurbishment of “Werk 1” in Zuffenhausen
- Platform to present all Porsche business fields to customers

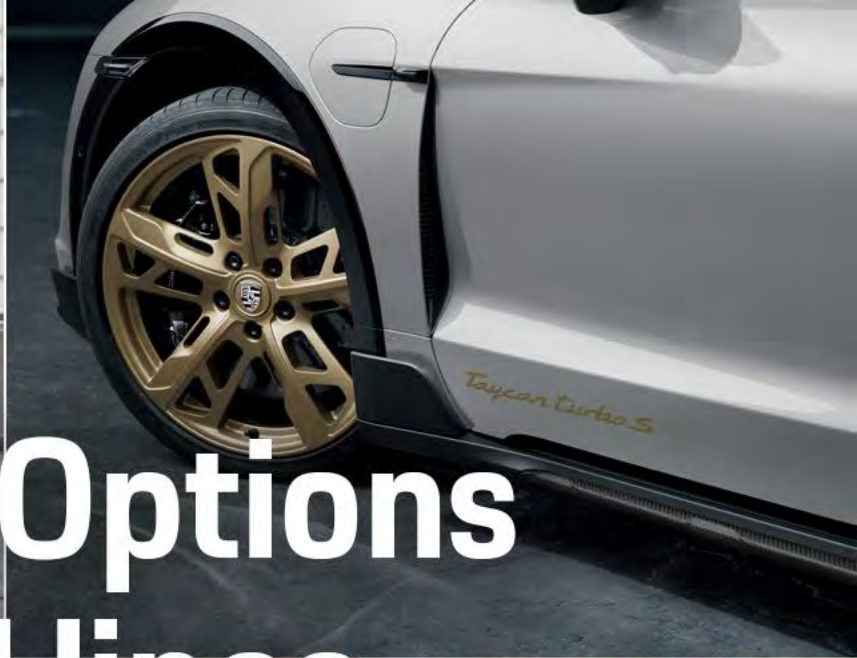
Welcome to the factory of your dreams

OVERVIEW OF THE REFINEMENT LEVELS

Vehicles Exclusive Manufaktur	SONDER- WUNSCH	Customer specific High-End projects either ex factory or afterwards as Re-Commissioning	
	LIMITED SERIES	e.g. 911 Targa 4S HDE / 911 Dakar	
	EDITIONS	e.g. 911 Carrera GTS Le Mans Centenaire Edition / 911 Carrera GTS 30 Years Porsche Thailand Edition	
Options Exclusive Manufaktur	EXCLUSIVE MANUFAKTUR OPTIONS	Manufaktur installation e.g. leather parts for interior (air vents) & Installation at assembly line e.g. 911 Carrera Aerokit Paint to Sample / Paint to Sample Plus	
Accessories Tequipment	TEQUIPMENT	Installation at Dealership e.g. roof tent or child seats	



>1000 EXCLUSIVE MANUFAKTUR
options available



Exterior & Interior Options for all model lines





Panamera Turbo

EXCLUSIVE MANUFAKTUR





Taycan Sport Turismo

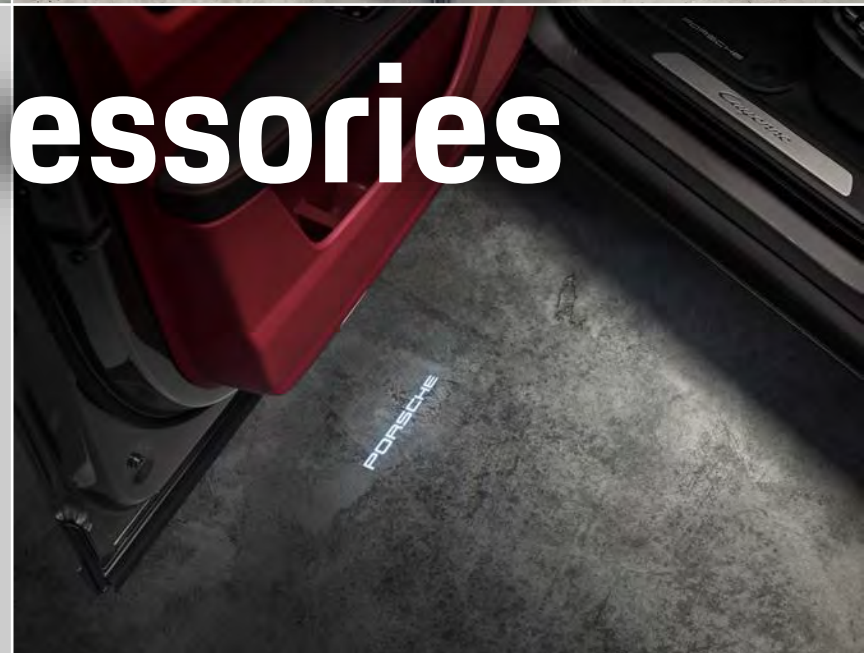
EXCLUSIVE MANUFAKTUR





Most attractive accessories

PORSCHE EQUIPMENT





911 Dakar

WITH RALLYE DESIGN PACKAGE



Exclusive Manufaktur Trim Lines – Equipment Packages



Market Editions














Paint to Sample

Cooperation Projects



Overview of the refinement levels

The customization pyramid clarifies how the newly launched Sonderwunsch (special request) program includes a high degree of customer customization, right up to completely new vehicle concepts.

Vehicles Exclusive Manufaktur	 SONDER- WUNSCH	Customer specific High-End projects either ex factory or afterwards as Re-Commissioning	 	
	LIMITED SERIES	e.g. 911 Targa 4S HDE / 911 Dakar	 	
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Accessories Tequipment	TEQUIPMENT	Installation at Dealership e.g. roof tent or child seats		

The newly launched Sonderwunsch program

INCLUDES A HIGH DEGREE OF CUSTOMIZATION OF ENTIRE VEHICLE CONCEPTS

Sonderwunsch

Factory Commission

Color and trim

New cars ex-factory



SINGLE OPTIONS

Factory Re-Commission

Color and trim

Customer cars

Classic cars



ENTIRE CAR CONCEPTS

Factory One-Off

New parts development

Customer cars

Classic cars



ENTIRE CAR CONCEPTS

The Sonderwunsch Factory

ONE-OFF PROCESS AT A GLANCE

ALIGNMENT



01

CONCEPT PHASE

fixed price

Starting from EUR 100,000 net



02

REALIZATION PHASE

individual price



Support from
PERSONAL
Porsche team



Contract



Contract



Results of the concept phase

Project documentation

(SPECIFICATION SHEET)
INCLUDING:

- Technical data
- Design concept
- Renderings



Individual scale model
based on your concept



Color and equipment
samples of the
final design concept



Parts prototyping
(if required)

Includes on-site visits to Porsche and regular virtual meetings





Panamera Turbo

SONDERWUNSCH





Panamera Turbo

SONDERWUNSCH





Panamera Turbo

SONDERWUNSCH



Panamera Turbo

SONDERWUNSCH





Taycan Turbo S

INSPIRED BY DING YI





Taycan Turbo S

INSPIRED BY DING YI





LET'S SHIFT
upwards

Shift upwards

4 AREAS TO [UP]SCALE THE INDIVIDUALIZATION & CLASSIC STRATEGY.

01 Scale existing individualization offer



02 Create new individualization dimensions



03 Create new experiences



Maximize impact on brand



Live up to the increasing desire to
INDIVIDUALIZE ONE'S PORSCHE
and leverage the market potential.



Mission

" In the beginning,
I looked around and could not
find the car I dreamed of.
So I decided to build it myself."

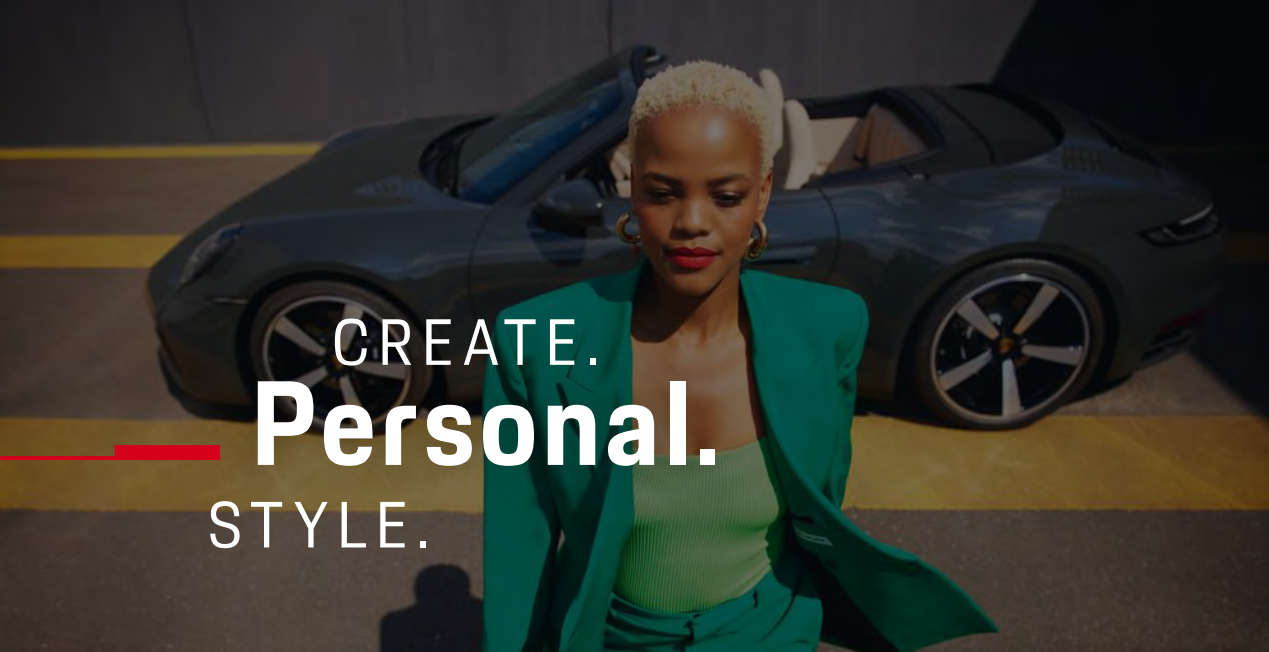
Ferry Porsche

AND THIS IS HOW WE AIM
TO SHAPE THE FUTURE OF
THE SPORTS CAR.



Vision

THE BRAND FOR THOSE
WHO FOLLOW THEIR DREAMS



CREATE.
Personal.
STYLE.



EQUIPPED
for Life



CARETAKERS OF
Dreams



YOU DREAM IT,
we build it.

**THANK YOU
for your attention!**



THE MOST PERSONAL CAR. – WELCOME TO THE FACTORY OF YOUR DREAMS

PORSCHE

Impressions

A silhouette of the Shanghai skyline at sunset, featuring the Oriental Pearl Tower and the Shanghai Tower. The sky is a warm, golden yellow with soft clouds. The buildings are dark against the bright background.

PORSCHE

Panamera







Sonderwunsch





PORSCHE



Porsche established the local R&D Satellite in 2022
TO KEEP PACE WITH THE HIGH DEVELOPMENT SPEED AND
PIONEERING INNOVATION OF THE CHINESE AUTOMOTIVE MARKET

**HOLISTIC DIGITAL
IN CAR EXPERIENCE**

EMOTIONALIZATION

**ECOSYSTEM
INTEGRATION &
INNOVATION SPEED**

We continuously expand our local R&D footprint to target the Chinese market and customer requirements

PORSCHE







A man in a dark suit and black shirt stands in the center of the stage, gesturing with his hands as he presents to the audience.



Panamera



PORSCHE



LOVE AND
DREAMS





Panamera

