

# Richard Walker



e-mobility NSR



## E-Mobility NSR Conference “Policy, Practice and Profitability”





# E-mobility and Electric Motorcycles Building a Sustainable, High Performance EV Business

Richard Walker, CEO, Zero Motorcycles, Inc.

E-Mobility: “Policy, Practice and Profitability”

Haarlem, The Netherlands, 10 October 2013

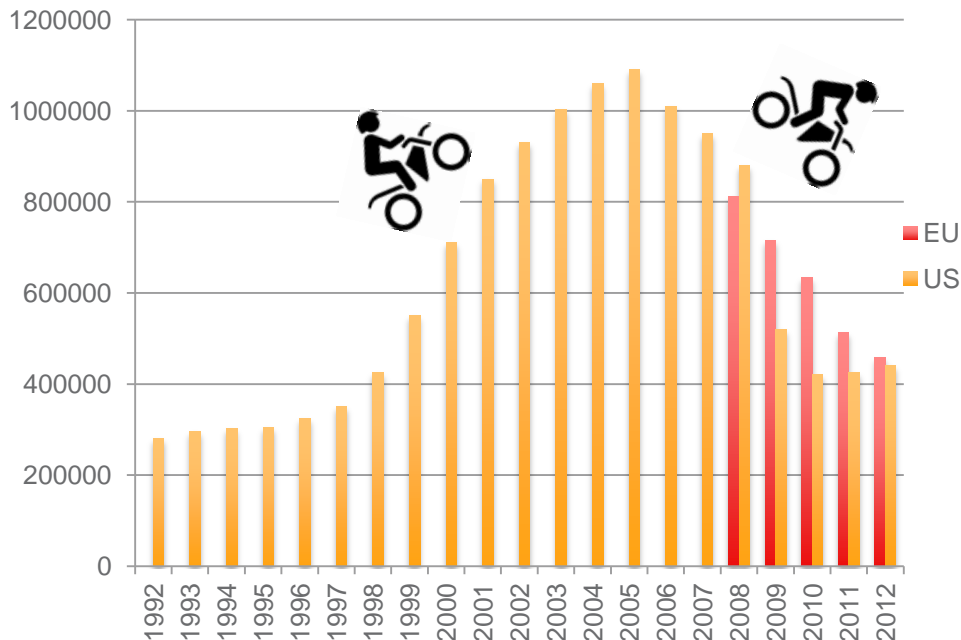


# Motorcycles The Worst of Times



e-mobility NSR

## EU & US Motorcycle Sales 1992-2012



Motorcycle sales worldwide have dropped dramatically since the global recession and have never recovered.

US Motorcycle sales are still down over 50% since their 2005 peak.



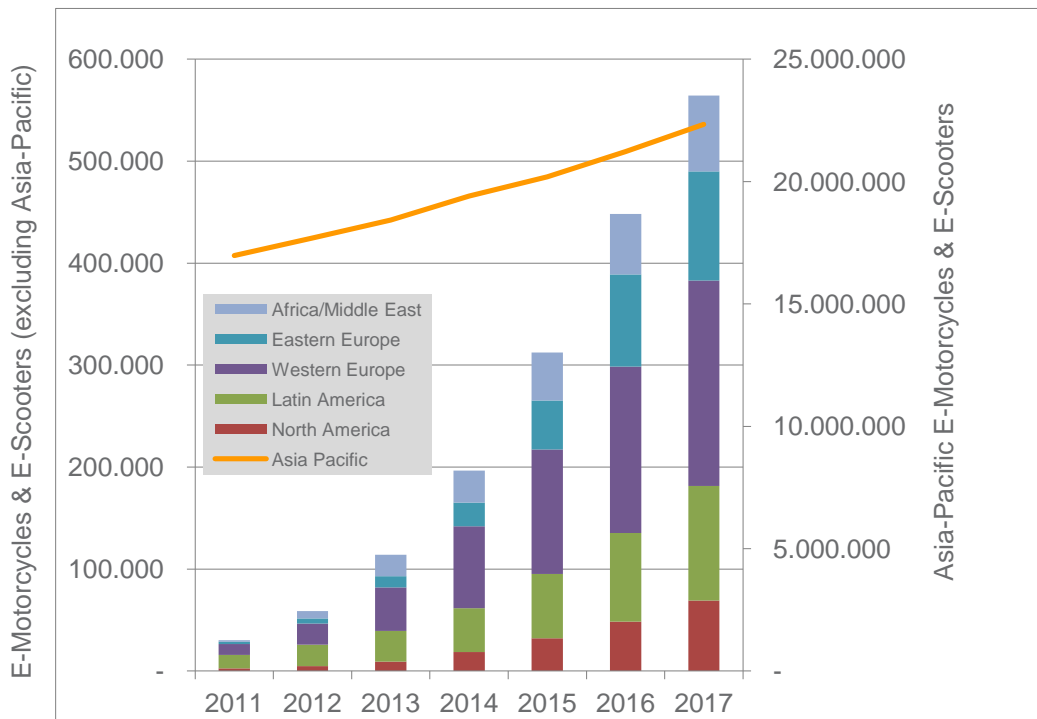
# Motorcycles

## The Best of Times



e-mobility NSR

### Annual E-Scooter and E-Motorcycle Sales by Region



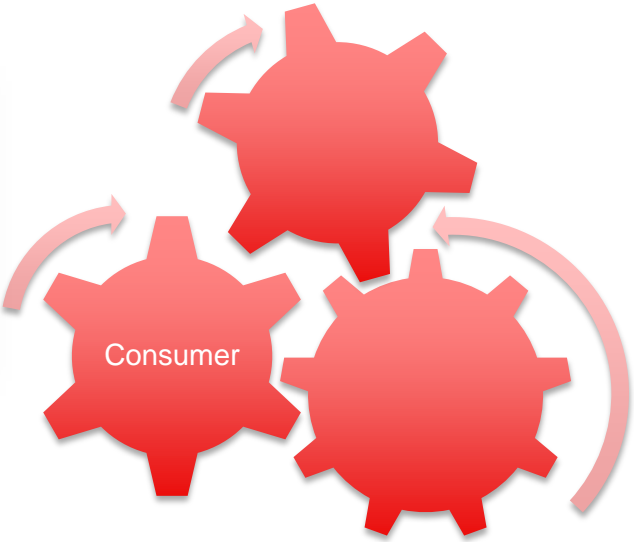
Pike Research predicts the market for e-motorcycles will grow significantly in Western Europe (78% CAGR between 2012 and 2018).

The North American market is also expected to grow, reaching sales of 69,116 vehicles by 2017.

# Zero's Strategy 3 Elements

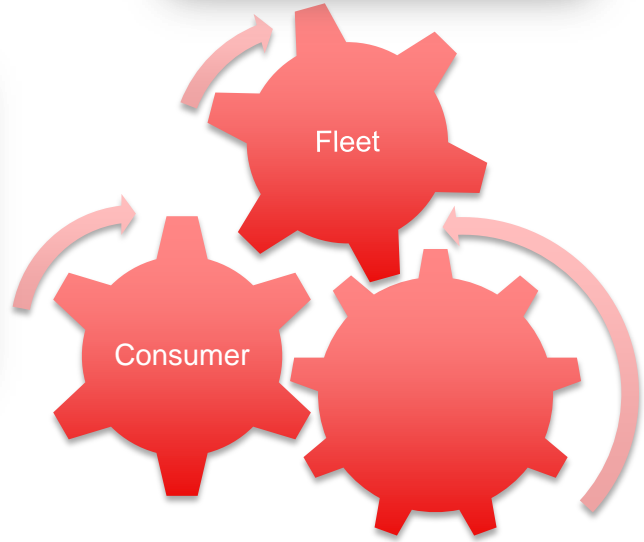


e-mobility NSR



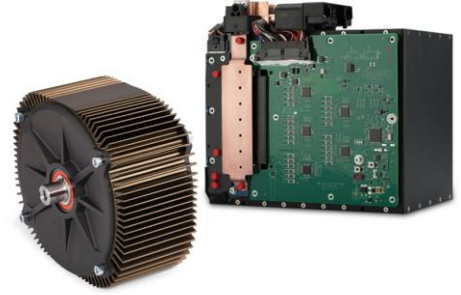
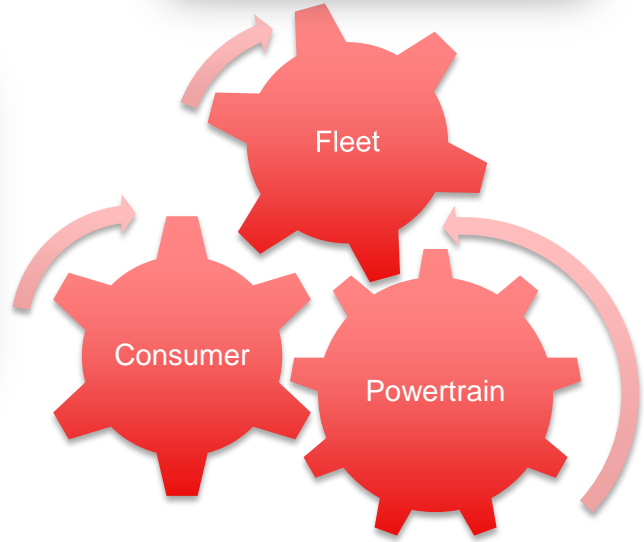
# Zero's Strategy 3 Elements

 e-mobility NSR



# Zero's Strategy 3 Elements

 e-mobility NSR



# Path to Profitability Take A Deep Breath



e-mobility NSR





# Path to Profitability



Educate and inspire consumers to help grow the market.



# Path to Profitability



e-mobility NSR



Educate and inspire consumers to help grow the market.

Tightly manage the cost structure. Strive for scale through strategic powertrain partnerships.



# Path to Profitability



e-mobility NSR



Educate and inspire consumers to help grow the market.

Tightly manage the cost structure. Strive for scale through strategic powertrain partnerships.

Focus on the right application and business case to accelerate growth.

