



Sustainability Day 2025

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Welcome to the FAAS Sustainability Day 2025

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Welcome and opening



Louise Wohrne



Michael Boe





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Sectoral Sustainability Overview



Tilmann Vahle

Quantis
A BCG COMPANY

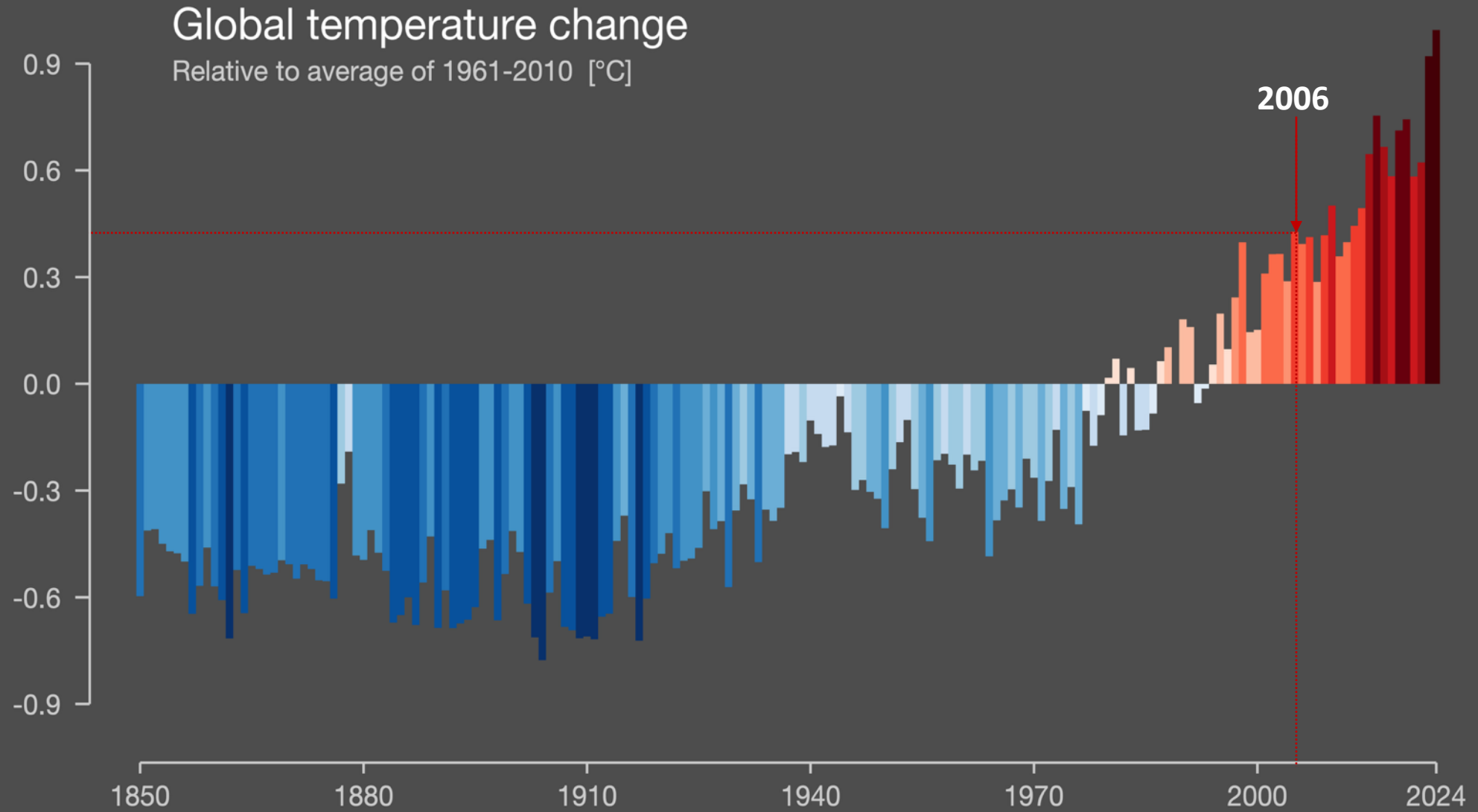
Sustainability in automotive parts & aftermarket

FAAS Sustainability Day
Dinner Address

Tilman Vahle
Principal, Quantis Industrials Lead Germany

November 26, 2025





Since our foundation in 2006, we have worked to solve critical environmental challenges

Who are we? – Quantis in a nutshell

We are a global sustainability consultancy committed to building a future that works for **people, planet** and **business**

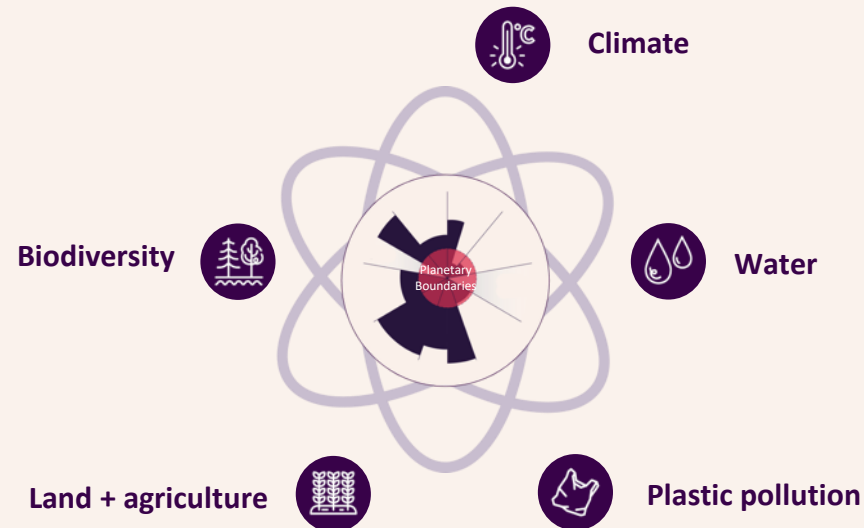


300+
sustainability
champions

5000+
client
projects

20
years of
experience

Where do we excel? – across planetary boundaries



Assess → Plan Transform

2025 Value creation areas

- Clear and actionable 2030 pathway**
- Cost clarity and efficiency**
- Strategic supplier partnerships**

Driving sustainability
across sectors

Food | Fashion | Cosmetics | Tech
Industrials | Pharma | Chemicals | Finance

Through standout
**initiatives, tools,
and collaborations**



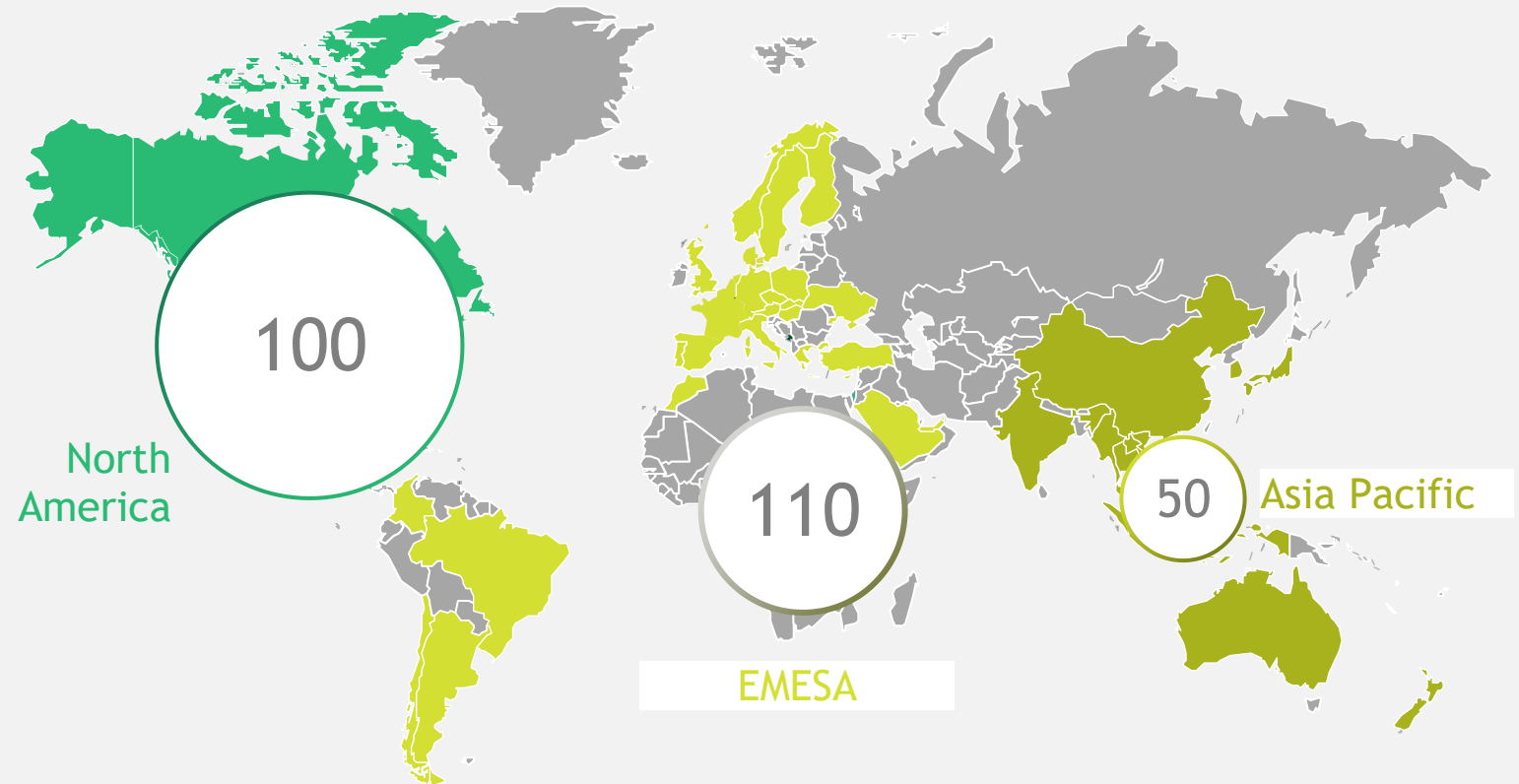


BCG supports
the worldwide
aftermarket
community

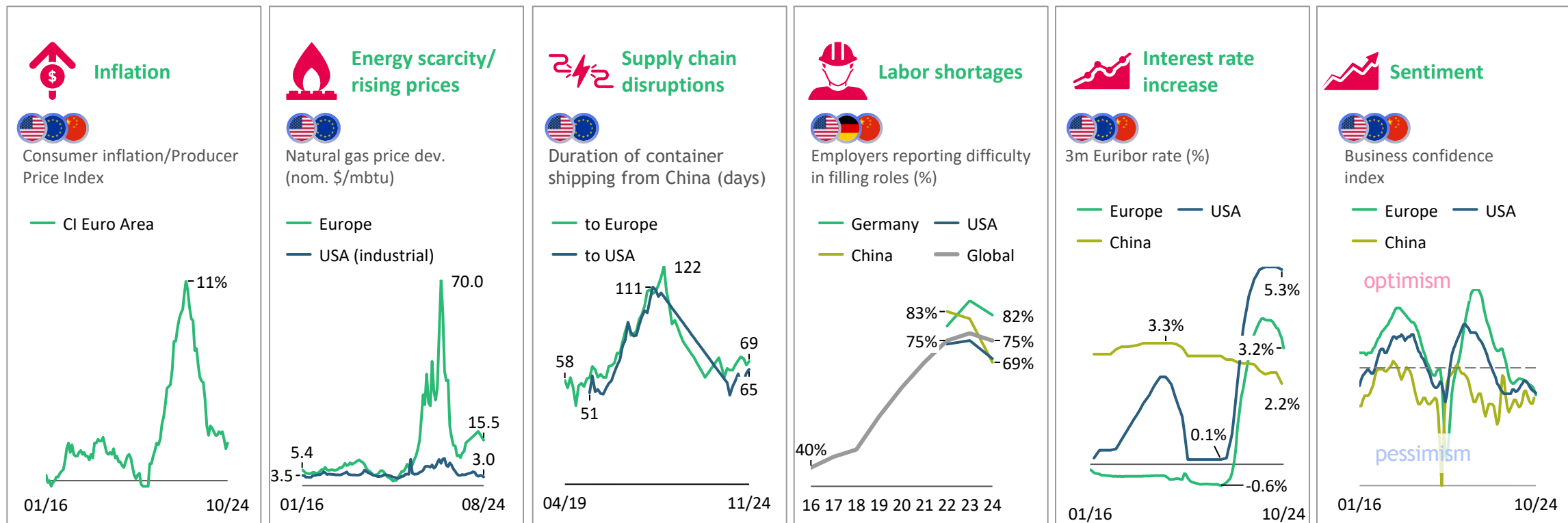
~260

Client
projects in
past 4 years¹

1. Includes January 2021-2025



EU Aftermarket is affected by current macroeconomic mix of headwinds

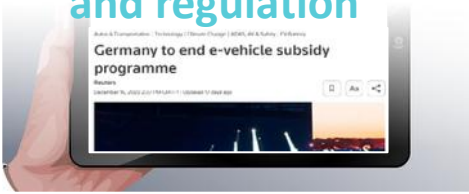


Geopolitics: War in Ukraine & risks associated with China/Taiwan

Covid aftermath

Physical & transition risks from climate change

A) Macroeconomics and regulation



- 1 Short-term **delay of maintenance** and repairs
- 2 **Reduced growth** and increased aging of car parc
- 3 **Sustainability** trend drives mobility transformation
- 4 Evolving **regulatory landscape**

B) Technology



- 5 Rising **part complexity** and integrated sol. drive up prices
- 6 **EVs** have differing parts and **decreased maintenance needs**
- 7 Rise of **connectivity**, in-car data, and analytics
- 8 **ADAS** requires more sensors and reduces collision rate

Long-term trends remain unwavering, including sustainability



GenAI-driven Lifecycle Management

Growth of smart AI solutions to connect with the client

7 15



Data driven pricing & inventory mgmt.

Growing profit orientation drives revenue & cost mgmt.

5 14



Re-cycling & Re-manufacturing

Increasing importance of circularity of raw materials

3 4



Fleet owners & management

Growing share of institutional aftermarket clients

10



Vehicle sales & fleet electrification

Shifts in applications and traditional profit pools

6

C) Customer behavior



- 9 Slow decline in **mileage driven**
- 10 Growing relevance of **fleet players**
- 11 Increasing influence of **insurers and intermediaries**

D) Value chain and competition

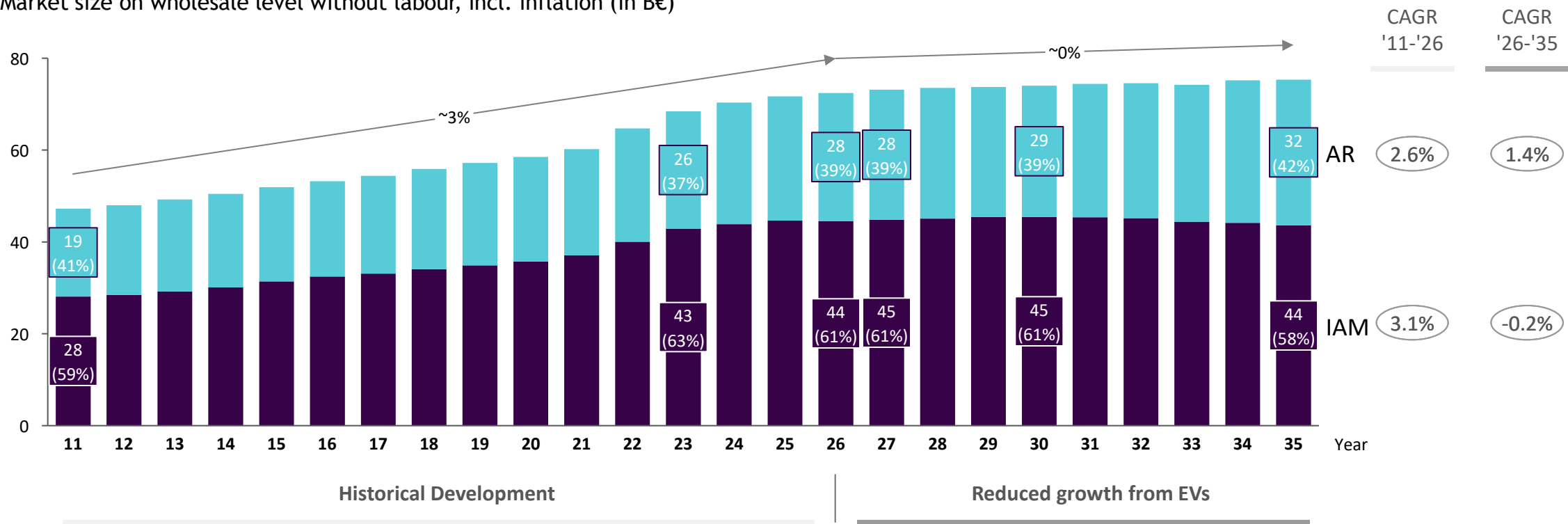


- 12 **OEMs** partner to get into EU market & push to segments 2&3
- 13 Increase of **private labels & value lines**
- 14 **Consolidation** pressures all market participants
- 15 **Rise of e-commerce & digital marketplaces**

Aftermarket growth expected to slow after 2026 mainly driven by shift to EV with lower spend per vehicle and accompanying shift to AR

European component aftermarket PC & LCV (in B€)

Market size on wholesale level without labour, incl. inflation (in B€)



Note: Market excluding trucks over 6 tons; numbers refer to wholesale level without labour
Countries include Germany, UK, France, Belgium, Netherlands, Italy, Spain, Poland
Source: Wolk; S&P Global Mobility; BCG market model, BCG analysis

After years of progress, the politics around climate action have changed

Early beginnings

- Sustainability reports
- Clean Energy subsidies

Boom

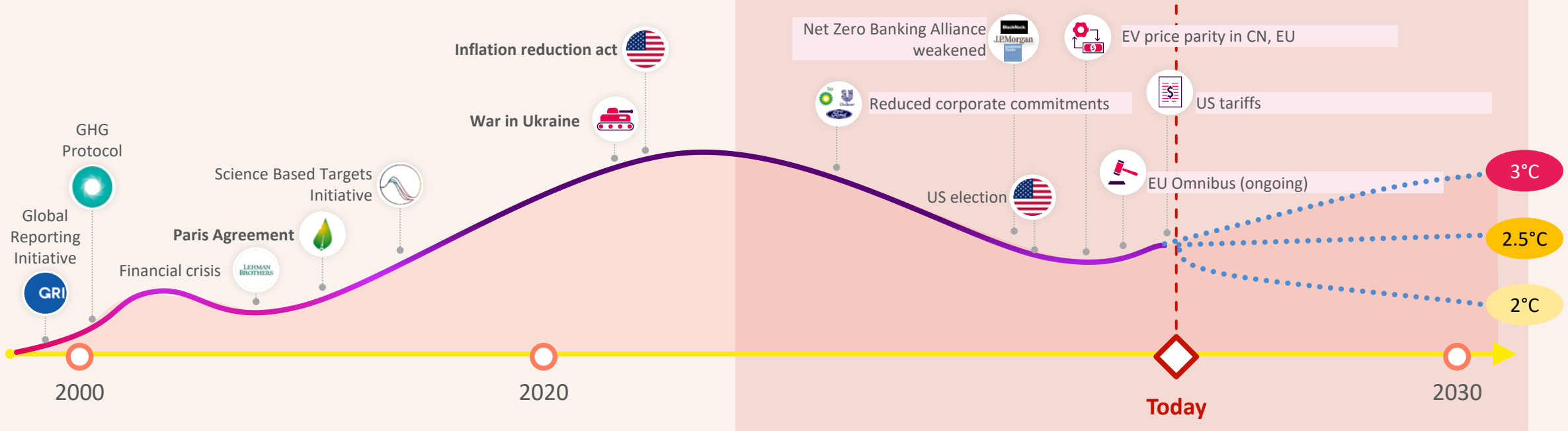
- Political action & new regulations
- Industry transformation
- Sustainability as strategy

Now: Backlash

- Political shifts
- Unplanned electrification delay
- Geopolitics
- Supply chain

Future: 2+ speeds?

- Diverging regulation
- Further surpassing of planetary boundaries?
- **Also: More green business cases?**



— Sentiment in climate investment landscape (illustrative)



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Sustainability Data



Batteries



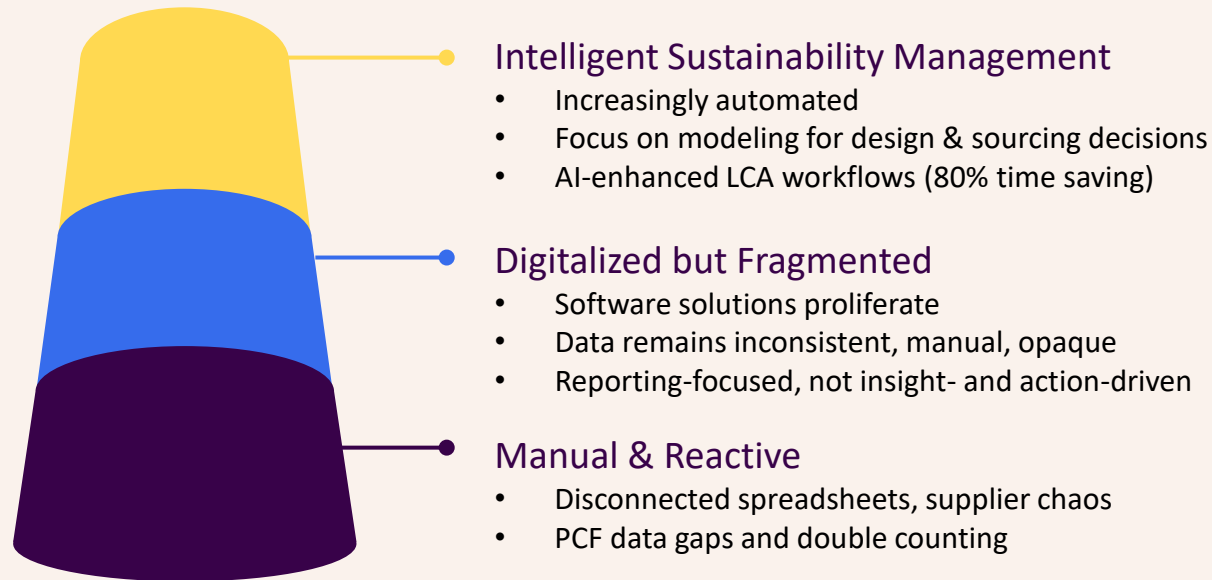
**Packaging &
Logistics**



Circularity

PCF isn't a reporting exercise — it's a design and sourcing advantage.

Evolution of sustainability data management



Our view after 20 years of industrial LCAs

PCF automation with SaaS & AI: up to 80% faster data prep & modelling

Success conditions:

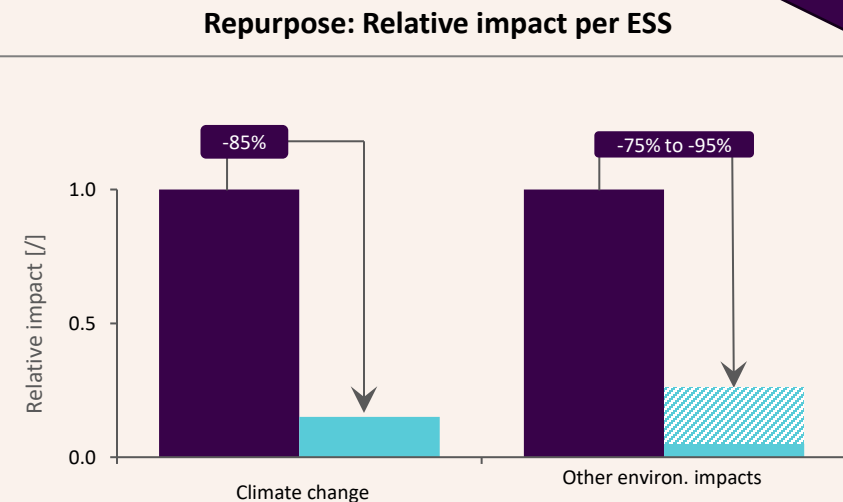
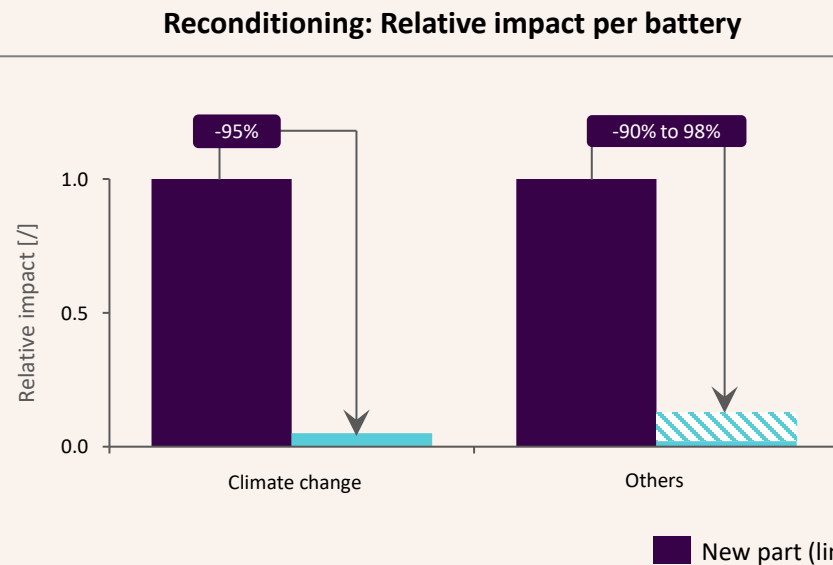
- Define the **WHY and VALUE**: use for strategy, ecodesign, customer asks – needs expertise & buy-in
- Process** gains importance! spotting hallucinations, embedding in business, exchanging data with customers
- BS in, BS out – **primary data** remains the bedrock

Sustainability teams remain vital, are empowered

Circular batteries: environmental impacts hold – innovation and durability limit viability at scale

Environmental impacts of **reconditioning and repurpose batteries***

Tentative results



- ❖ 2025 screening LCA for major EU OEM
- ❖ Typical failure mode: few cells, BMS – low replacements needed

- ❖ **Benefits substantial, replicable, and profitable**
- ❖ **Limits:** Car model phasing out; new cells outcompete

* Cut-off approach; Primary data & Ecoinvent 3.11; Results across 5 indicators Climate Change / Acidification / Freshwater Eutrophication / Ozone formation / Mineral resource use; screening LCA

The EU's **PPWR** sets binding rules for packaging

Also in the automotive aftermarket



Recyclability

- By 2030, all EU packaging must be designed for recycling
- By 2035, it must be "recycled at scale"



Recycled content

PCR (Post Consumer Recyclate) minimum:

- **35% by 2030**
- 65% by 2040



Reusability

Transport & sales packaging

- **40% by 2030**
- 70% by 2040

Grouped packaging (boxes, pallets)

- **10% by 2030**
- 25% by 2040

Reuse and recyclability efforts can

- improve environmental impacts
- raise emissions (volume, specific impact)
- increase sourcing resilience

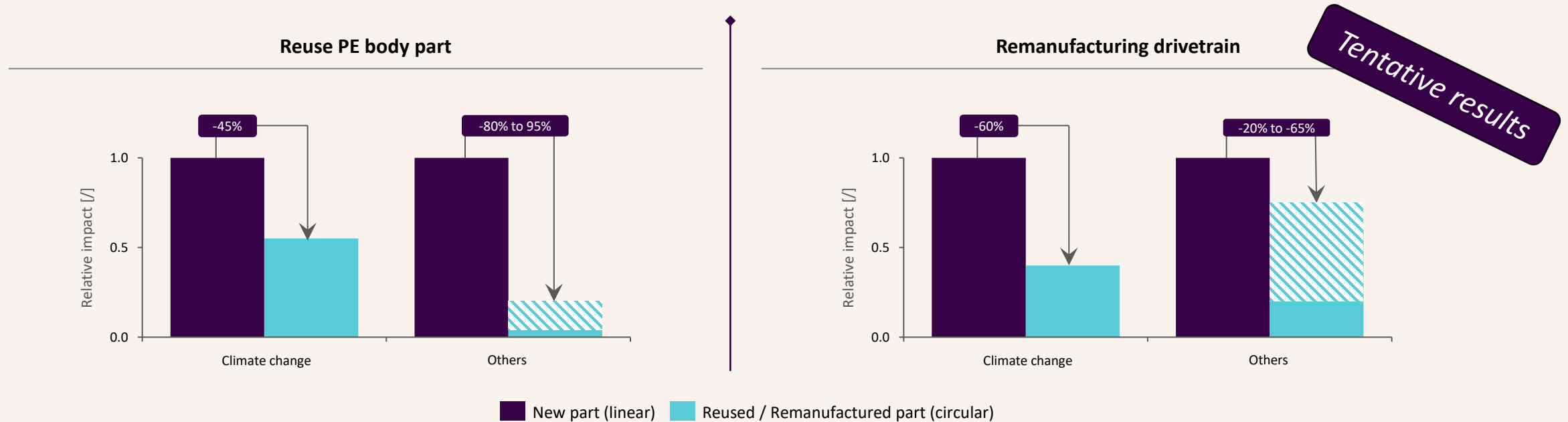


Imperatives for automotive aftermarket

- Review packaging & logistics approach
- Secure PCR supply/ query suppliers
- Innovate. Potential for reverse logistics

Car circularity: benefits vary widely by material and impact type

Environmental impacts of reusing plastic body parts and remanufacturing drive train parts



- ❖ 2025 screening LCA for major European OEM
- ❖ Findings consistently positive, with differentiated benefits depending on material (plastics vs metal) and depth of re-working
- ❖ **Scalable across existing fleet**, with knowledge transferrable economically to growing share of portfolio
- ❖ Validated LCA with primary data vital to steer activities effectively

Conclusions



Determination



Innovation

Uncertainty



Business value



The background of the slide is a close-up photograph of numerous water droplets of various sizes on a smooth, red surface. The droplets are highly reflective, creating bright highlights and dark shadows. A diagonal line, possibly a seam or a fold in the material, runs from the top left towards the bottom right, separating the surface into two slightly different shades of red.

Thank you

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The Sustainability Day resumes tomorrow at 09.00

Please join us for dinner

Offered by:

Quantia
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