

BMW GROUP INVESTOR & ANALYST DAYS 2025.

Summary of Key Messages



INVESTOR AND ANALYST DAY 2025: KEY MESSAGES.

NEUE KLASSE / iX3.

- Production of the NEUE KLASSE will begin at the new plant in **Debrecen by the end of this year**, with the first pre-production vehicle already completed.
- **By 2027, 40 new BMW models and derivatives** will incorporate NEUE KLASSE technologies **across various drivetrains**.
- The world premiere of the first NEUE KLASSE iX3 is set for September, marking the beginning of a new era for BMW.
 - The BMW iX3 offers an **electric range of up to 800 km WLTP** with **800Volt Gen6-Technology** and cylindrical battery cells featuring **20% higher energy density**.
 - innovative charging technology, enabling **400 kW charging power** for rapid energy replenishment.
 - It has a usable energy content of 108 kWh, capable of charging over **350 km WLTP range in just 10 minutes**, with a **bidirectional charging** option.
 - Energy consumption is **15 kWh /100km, a decrease of 20%** compared to the BMW iX3 2021.
- The upgrade to the powertrain using a combination of **EESM and ASM motors reduce energy loss by 40%, weight by 10% & manufacturing costs by 20%**. At the battery pack level, the introduction of Gen6 battery cells will deliver a **40-50% cost reduction** over Gen5.
- The **BMW Panoramic iDrive** introduces a new user interaction system, integrating a panoramic vision display, new steering wheel, and 3D head-up display. We have made a step-change with **our intelligent personal assistant using large language model technology**.
- We leverage key partners to deliver market-relevant performance including, the tech stack from **Alibaba, DeepSeek integration for China and Amazon Alexa**.
- NEUE KLASSE will launch as a next level software defined vehicle, introducing a **zonal architecture and four high-performance computers** – our “four superbrains” (Body & Comfort, Infotainment, Automated Driving, driving)
- Building on our long-standing experience with driver assistance systems, we will introduce the next level of automated driving experience that is smart, symbiotic and safe. The seamless symbiotic experience includes **the world first cooperative braking , alongside leading cooperative steering and the smoothest deceleration to standstill**.
- We leverage key partners to deliver market-relevant tech performance – for example, we collaborate with **Huawei, Alibaba, Tencent and Baidu in China**. On 15th July 2025, we announced a partnership with **Momenta to deliver local Chinese ADAS solutions**.

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E/E ARCHITECTURE / SDV.

- Neue Klasse ushers in a **new era of digital and driving experiences** for our customers. Our **completely re-developed electronics architecture** provides the future-proof foundation for the **next-level Software Defined Vehicle**.
- The is driven by a new level of customer experience, a **new software/hardware architecture**, a **smart partnering** strategy and a clear focus on **scalability**
- Two key achievements help to **elevate digital performance** to new heights and massively **reduce the complexity** of the electronics architecture:
 - (1) Centralizing computing power in four high-performance computers – our **“four superbrains”** (Body & Comfort, Infotainment, Automated Driving, driving);
 - (2) introducing a **zonal architecture** (zone integration modules and reduced cable harness) with an intelligent, digitalized power management.
- This zonal architecture with central performance compute platforms offers a scalable **solution for the complete range of vehicles and for all powertrain variants**, while increasing compute power and reducing complexity. It leverages smart **on-/offboard data processing**.
- It serves as a future-proof basis for the growing number and complexity of digital functions in the SDV – including **growing AI capabilities** over time – which create intelligent experiences for our customers.
- Further **decoupling of hardware and software** allows for a **fast-cycle software update**.
- In recent years, we have further developed our software platforms to create the conditions for ensuring **software compatibility over several generations** (software continuity). Software that will continue to evolve following the launch of the Neue Klasse will therefore be **backwards compatible** with the first Neue Klasse vehicles.
- Our flexible Software Architecture enables us to perfectly cater to **local customer needs**. Around 70 % of our infotainment software in BMW Operating System 9 for China are China-specific.

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SOFTWARE DEVELOPMENT.

- The BMW Group started its own software development over 20 years ago.
- Since then, the company has continuously expanded its developer teams within a global network. The BMW Group employs approximately **10,000 software developers globally**. Further contributions come from our partners and suppliers.
- With state-of-the-art tooling such as our continuous integration development environment "**Codecraft**", the organization is already implementing up to **200,000 software builds** (source code that can be executed on a control device) **per day**. That is an increase by factor 130 compared to 10 years ago.
- Despite a high level of internal expertise, the BMW Group has always been convinced that developing the complete vehicle software in-house would not be as impactful as **collaborating in selected areas with partners**.
- The BMW Group follows a strategic "**Pick-the-Best**" approach: customer-relevant / brand-defining / differentiating software (vs. competition) is developed in-house. Basic functionalities are sourced from leading companies in the industry (industrial building blocks) or covered through open-source solutions. For example, the map basis for navigation in China for Neue Klasse will come from Amap.
- We have made a **step-change with our intelligent personal assistant using large language model technology**. We leverage key partners to deliver market-relevant performance including, the tech stack from **Alibaba, DeepSeek** integration and **Amazon Alexa**.
- The BMW Group, as a system integrator, **masters the entire digital car tech stack "from chip to cloud"**. Even though not every line of code is created in-house, we have access to the entire code repository and can update every line of code across all functional vehicle domains over-the-air and have been doing so already for the past six years.
- With our **Remote Software Upgrade**, we reach **over 10 million vehicles already today**: more than 60 models, including all powertrain variants making it the world's largest fully updatable fleet. The upgrades access **all aspects of the vehicle including safety critical systems**. Besides security updates and quality improvements we've shipped new features to our customers such as infotainment functions like "Curve-Ahead-View", Video-Streaming and Parking Payments, or ADAS features such as Remote Control Parking, Trailer Assistant, Exit Warning and more.
- With a **max. installation time of 20min**, we set the industry benchmark for remote software upgrades.

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DRIVING DYNAMICS AND AUTOMATED DRIVING.

- Our current driver assistance systems are among the best in global markets: the ultimate goal of intelligent driving is to offer an **always on, smart, symbiotic & safe experience** for our customers. We adhere to a philosophy that driver assistance should always **make driving safer and always deliver a typical BMW driving experience**: confident, and comprehensible with a precise and reliable driver intention detection.
- We have been developing **ADAS for more than 20 years** guided by a "safe-to-use" product philosophy. We are only launching customer functions to market when maturity and safety are proven. This means we **test and validate to the highest external and internal standards**.
- We build on our extensive experience with **driver assistance systems** already in customer hands for many years. The take rate of the current Highway Assistant (L2+ function) is more than 50% for Germany and more than 40% for the US.
- BMW is the **first to approve Hands-Free Highway Assistant according to UN-ECE R171** on the market
- New in the all new BMW iX3:
 - The "Superbrain of Automated Driving" has **20x higher computing power** than previous generation technology. It brings new, competitively leading ADAS features to the new BMW iX3. And that is in line with our philosophy: **smart, symbiotic and safe**.
 - New and improved features based on **cutting-edge sensor, software, processor and cellular technology**.
 - We offer **expanded range of functions in the basic configuration** compared to the previous generation, e.g. lane change warning, right of way warning, safe exit (exit warning) and display assisted view.
 - Symbiotic driver assistance with **cooperative steering and the world's first cooperative brake** during active assistance.
 - **Motorway and City Assistant** helping to drive through curves or roundabouts, offering traffic light recognition, including automated stopping and starting.
 - **Automated parking** with intuitive operation as well as optimized parking space recognition and maneuver planning
- BMW partners with **Qualcomm and Snapdragon** for the next generation of ADAS. China's ADAS leading player **Momenta** has just been added to develop "China-specific solutions" for locally produced Neue Klasse models – this focuses on Chinese road networks, traffic conditions and user expectations, utilising advanced AI algorithms and data driven development methods.

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POWERTRAIN.

- BMW Group is introducing its **sixth-generation eDrive technology** as a major advancement in electric mobility, with the Neue Klasse platform. This delivers the typical BMW driving experience and **balances the key properties of power/performance, energy density, battery life, safety, sustainability and cost.**
- The Gen6 high-voltage battery system includes a new concept utilizing BMW's **proprietary cylindrical cells**, resulting in **30% faster charging speeds** and a **30% increase in driving range**, with some models exceeding this.
- Gen6 architecture introduces **800V technology, cell-to-pack, and pack-to-open-body concepts**, enabling slimmer battery design and direct integration into vehicle structure, improving packaging and efficiency (**400V charging is still possible**).
- BMW Group is advancing electric mobility with its innovative charging technology, enabling **400 kW charging power** for rapid energy replenishment.
- The new system allows drivers to add over **350 km of range in just 10 minutes.**
- The concept of **bidirectional charging** positions your BMW as a mobile power bank, facilitating energy transfer to homes or the grid, thus enhancing energy management.
- The **BMW Energy Master**, a **fully in-house developed and produced central control unit**, orchestrates high-voltage battery functions and enables real-time, remote software upgrades, providing strategic flexibility and technical independence.
- BMW Group uses both **EESM (electrically excited synchronous motors)** and **ASM (asynchronous motors)** across different drivetrain configurations, enhancing flexibility across the whole portfolio and in catering to regional mobility needs.
- The **Gen6 motors** feature redesigned rotor, stator, inverter, and thermal systems for optimal integration with **800V architecture, resulting in 40% reduction in energy loss, 20% lower costs, and 10% weight savings compared to Gen5 xDrive models.**
- Overall, the iX3 delivers energy consumption of **15kWh/100km**

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PRODUCTION INTEGRATION.

- With the iX3, BMW will introduce the latest generation of its **strategic focus technologies across the entire production network**.
- Located close to vehicle plants in the **three world regions, 5 new state-of-the-art assembly plants for sixth generation high-voltage batteries** are currently under construction, delivering **improved logistics** and strengthening BMWs **resilience in the geopolitical environment**.
- To ensure the successful global launches of than **40 new or updated vehicles across all powertrains by 2027**, BMW utilizes the full potential of the BMW production network:
 - By **temporarily assigning employees from the respective series plant to the prototype plant in Munich**, where they get trained on the product, familiarize themselves with the new vehicle as well as the production processes. Additionally, they contribute during the development phase with their knowledge and experience from their home plant.
 - By **assigning people from the production network to the launch plant of a new product**, we ensure the right qualifications and experience for the launch. In return, people gain experience and insights that ensure a successful rollout of new products into the worldwide plant network.
- **At BMW's prototype plant, development, purchasing and production employees come together to create 360° knowledge** of the product, the production system and production processes. This knowledge is then rolled out into the production network, into development and industrialization.
- The BMW technology network ensures **optimal standards and methods for cost efficiency and quality** within the production network.
- The BMW plant network guarantees relevant launch support for a **stable ramp-up and market supply**.
- BMW's production network ensures the high-quality standards by applying **quality processes and the zero-defect mindset** in every facility.

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GLOBAL AND FLEXIBLE PRODUCTION SYSTEM.

- Based on **one technology standard**, BMW Group successfully operates a **global, flexible and resilient production system**.
- Our production strategy has successfully **mastered many challenging situations** (e.g. semiconductor crisis) by ensuring delivery capabilities while remaining profitable at the same time.
- **BMW Group is benchmark in managing complexity and customers individual needs**. All BMW Group plants e.g. are capable of producing different model variants and drive train types on one single assembly line.
- Complexity topics and customer requirements are deeply embedded in BMW Group's product strategy and blueprints, which is continuously optimized. All our plants benefit from these optimizations given the identical technology standard.
- Innovation is built into the foundation of BMW, so we do have **many innovation and efficiency measures implemented in various areas within our production system**.
Our Virtual Factory e.g. is projected to reduce production planning costs by up to 30 percent (inc. e.g. the digital collision check now completed in 3 days rather than one month manually).
- Innovative solutions have to be beneficial for the BMW Group and our customers. Therefore, **all innovations are measured regarding the requested levels of effectiveness and speediness**. Only then, will they be included into BMW Groups production system and rolled-out to other plants.
- **Interlinking digitalization megatrends creates new possibilities** for the BMW Group and supports us to **redefine our production system**.
- **The use of artificial intelligence supports the digital transformation of BMW Group production towards an intelligently connected factory**. In this way, we are optimizing our production processes and creating added value for our products and, ultimately, for our customers.
- We have **successfully tested humanoid robots** at BMW plant Spartanburg and are determining possible applications for their utilization within our production. **We will continue to accompany this technology** from development to industrialization.

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THE BMW BRAND IN THE CHINESE MARKET.

- The **current Chinese macroeconomic situation remains difficult**. The consumer confidence index in particular is stagnating on a low level.
- Due to the economic situation, **consumer behaviour is changing** across various industries. Socio-economic factors that impact the consumer behaviour are - among other things – a **changing social media environment**, a new form of **national pride**, a shift towards more rational consumption and overall **scepticism and hesitancy**.
- For the customers in the automotive industry, we see a **shift in the development in target groups and changing purchase motivations** amidst a highly dynamic competitor landscape. Whilst brand and product USPs in the area of tech features and functions are gaining relevance, **traditional purchase motivations such as product design and brand/reputation remain highly relevant**.
- The BMW brand and communication strategy for the Chinese market takes the economic context as well as the changing customer behaviour into account.
- In line with the global BMW brand direction, a **China-specific communication approach** was created to further develop and build on the strong and beloved BMW brand in China.
- An extensive presence at **Auto Shanghai 2025** including the BMW Vision Driving Experience and a holistic 360 degree communication approach have created **strong momentum for the BMW brand**.
- Further brand and communication activities are planned for the Chinese market over the coming years including a **dedicated "Road to Neue Klasse" communication approach**.

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BMW PRODUCT OUTLOOK.

- The brand directions are aligned with the product and technology roadmap to **capture market potential** and **drive profitability**.
- In the coming years, BMW will focus **on four main brand narratives: Core, High Performance, X-Family, and Exclusivity**. Milestones will be established for each narrative to orchestrate the market launches.
- The "**Road to Neue Klasse**" featuring the new BMW iX3 as the first model, marks the **beginning of this journey**. The upcoming iX3 will introduce advancements in user interaction, electrification, driving dynamics, and design aesthetics.
- The **BMW M brand** has achieved another **sales record in 2024**, supported by a technology-neutral approach with its three top models.
- The **X-Family** is a notable success story for BMW, **accounting for half of the total volume** and leading in various segments with a diverse portfolio.
- In the **exclusive segment**, BMW's top-end models are **enhanced by BMW Individual options** and **limited small series**, such as the BMW Skytop and BMW Speedtop.
- Over the next **24 months, more than 40 BMW models** will be launched, enriching the brand narratives with substantial content.