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## Future Fleet Trends for the European Automotive Industry

Kuntal Vora | Director

Houston TX, USA

UPSTREAM | MIDSTREAM | DOWNSTREAM | FUEL & TRANSPORT



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# Agenda

Introduction to the Global Automotive Service

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EU Light Duty Vehicle Market

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Country Insights – Germany, Spain, France & Italy

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Conclusions

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Q & A

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# Our Research Divisions

Strategic insights across the energy value chain



## Upstream

Drill down with a ground-level look at the fields, wells and companies involved in E&P.



## Midstream

Move confidently in new frontiers that are being shaped by changing supply/demand dynamics coupled with investments in pipeline, rail and ship logistics.



## Downstream

Thrive in an environment where crude oil supply dynamics and product demand trends are structurally evolving.



## Fuel & Transport

Accelerate innovation with a comprehensive understanding of policies pertaining to petroleum-based fuels, biofuels and other alternative fuels.



# Global Automotive Service

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A New Flagship Service of Stratas Advisors

# The Service

## Global Automotive Service – A New Offering of Stratas Advisors

The Global Automotive Service tracks current and forecasts future fleet characteristics, composition and size for light, medium and heavy duty vehicles. Our unbiased analysis incorporates global balance factors like

- Economics;
- Environmental policy; and
- Energy composition & demand.

Coupled with unparalleled customer service and direct, easy access to our researchers, the service will help you:

- Analyze current fleet characteristics
- Evaluate future powertrain trends and markets
- Understand import-export strategies for OEMs
- Gain insight for used vehicle markets
- Energy demand evaluation (requires subscription to other services)



# Information, Analysis & Benefits

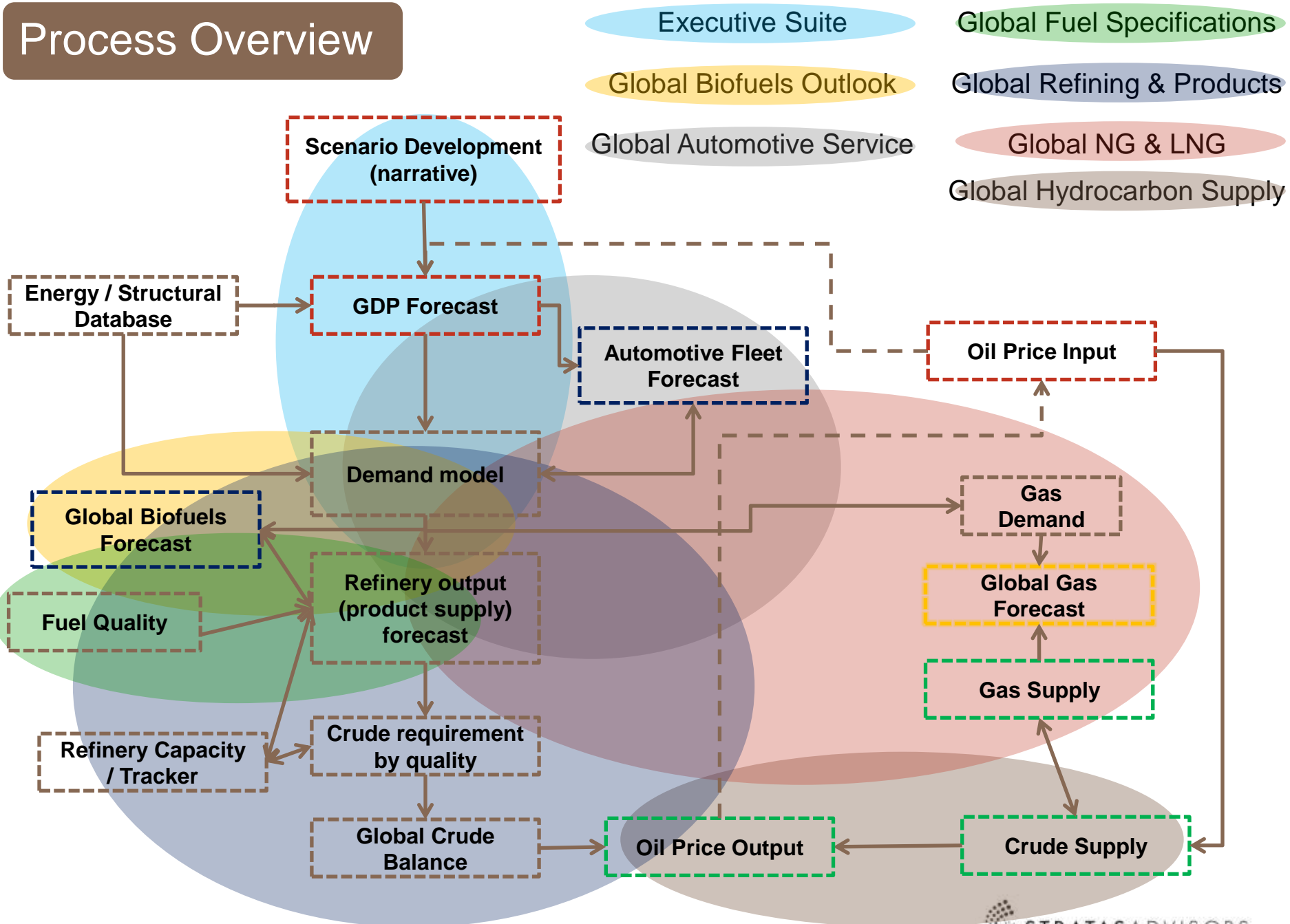
What is provided and how is it used

- Database of historical, historical corrected and future fleet projections.
- Coverage across the globe, including North America, Latin America, Europe, Asia and the Middle East.
- Global automotive production facilities tracking.
- Direct access to our user-centric research time.

Who Uses	How?
<b>Automotive Manufacturers</b>	Develop powertrain strategies within context of future market conditions and competitive landscape
<b>OEM's</b>	Future technology requirements and current fleet characteristics for replacement parts
<b>Refiners</b>	Understand how the composition of the vehicle fleet will affect future demand for petroleum fuels
<b>Infrastructure Developers</b>	Pinpoint the locations, companies and projects with the best potential for strong returns.
<b>Governments</b>	Improve the efficacy of regulatory and logistical initiatives.
<b>Fleet Operators</b>	Secure the most cost-effective fleet investment.



# Process Overview



Executive Suite

Global Biofuels Outlook

Global Automotive Service

Global Fuel Specifications

Global Refining & Products

Global NG & LNG

Global Hydrocarbon Supply





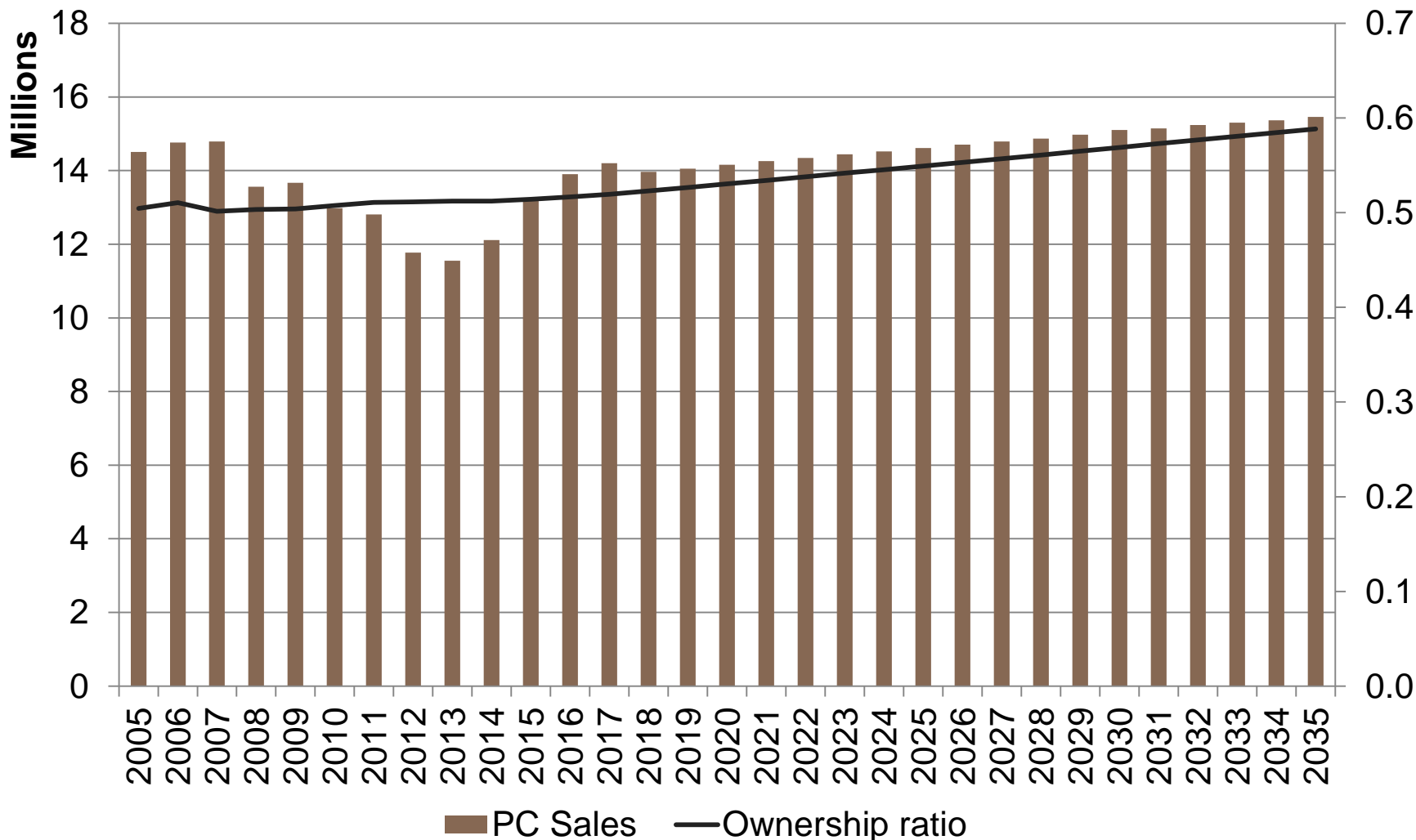
# EU Light Duty Vehicle Market

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2015 – 2035: Passenger Cars and Light Duty Trucks

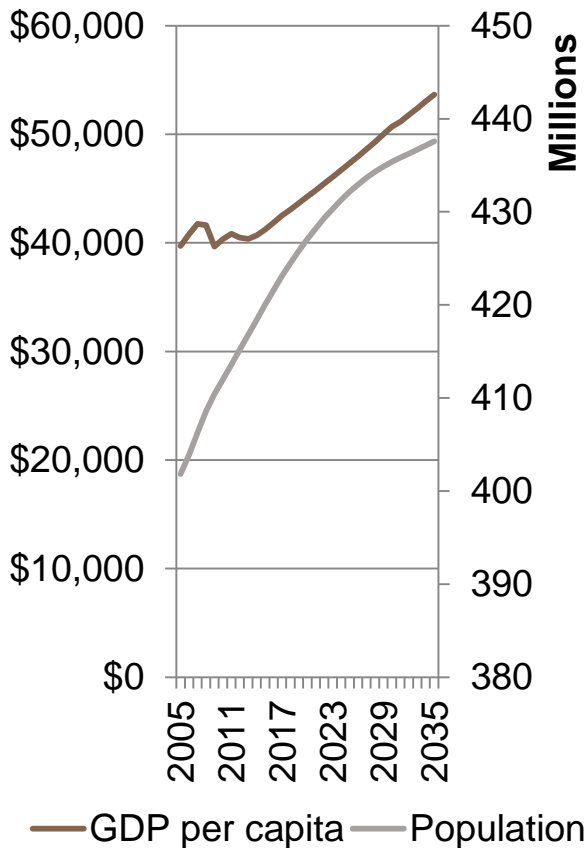
# EU Light-Duty Vehicle Market

Sales projections for EU15 + EFTA – ownership ratio approximately 0.51

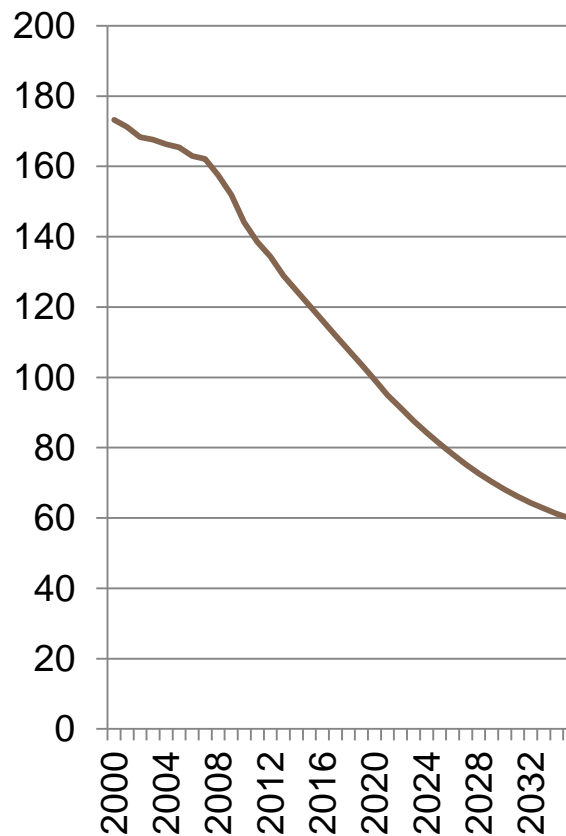


# EU GDP, Population, VMT, MPG and Energy

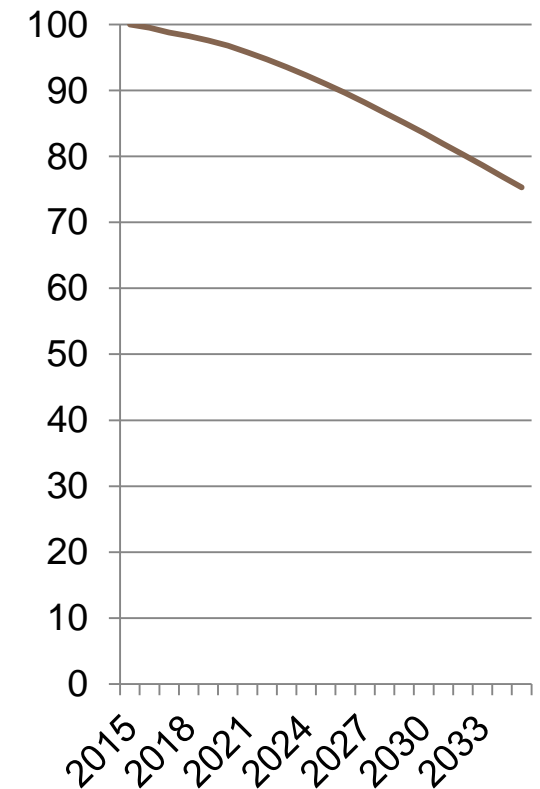
## EU Economy



## Emissions (gCO<sub>2</sub> / km)

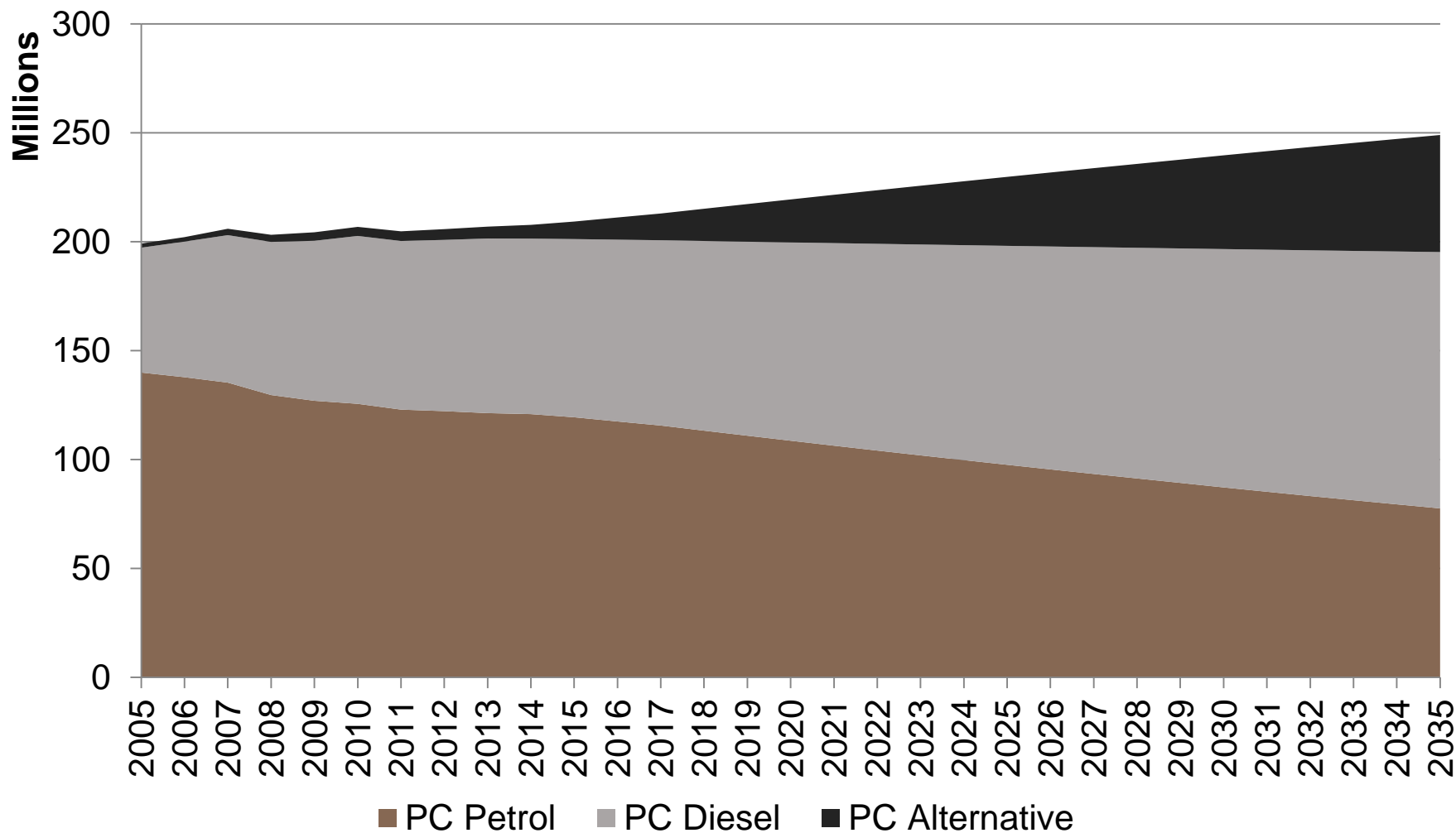


## LDV Energy Demand



# EU PC Fleet Forecast by Fuel

Diesels continue to maintain market share, however largest gains made by alternative powertrains





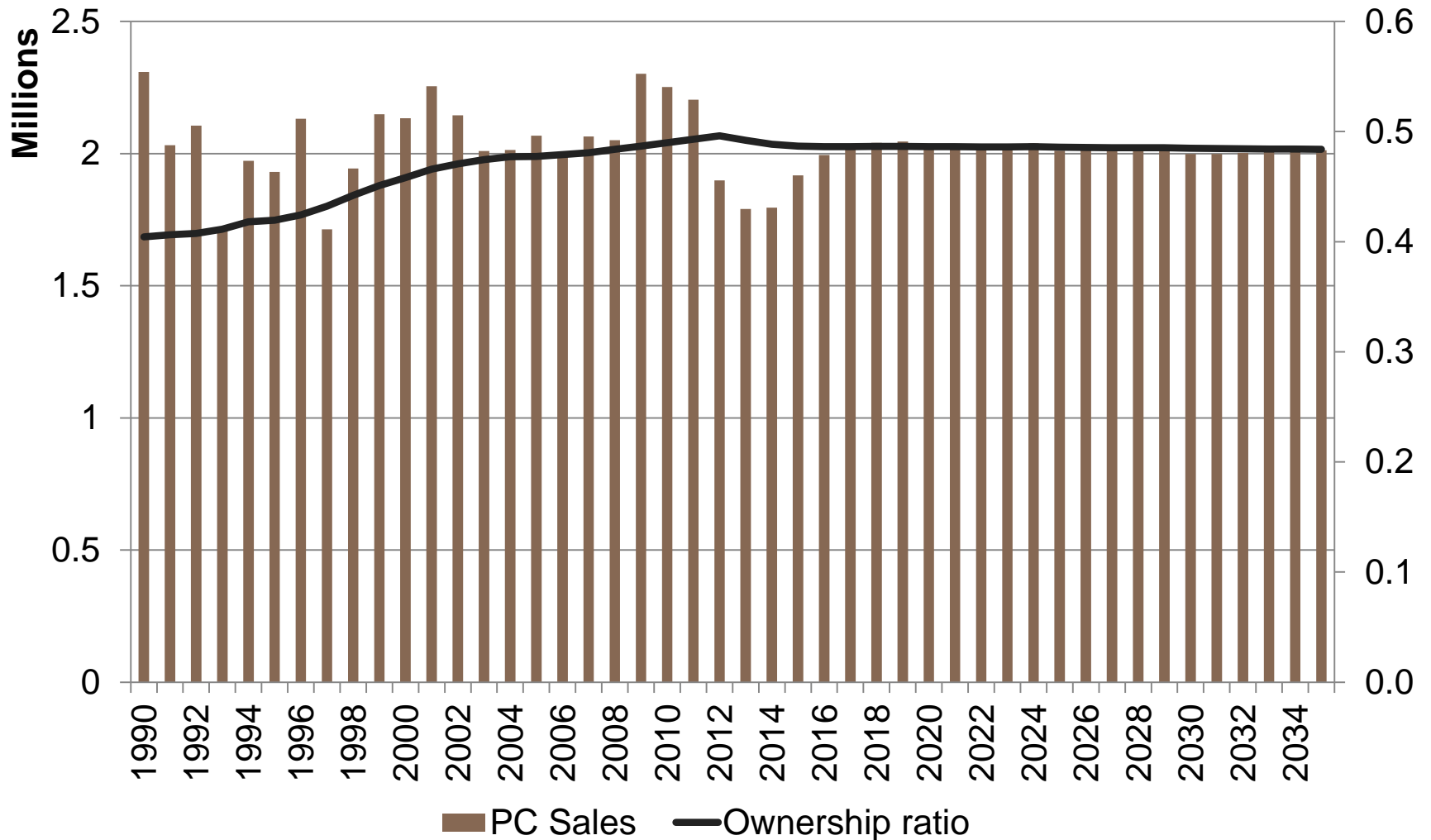
# France Light Duty Vehicle Market

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2015 – 2035: Passenger Cars and Light Duty Trucks

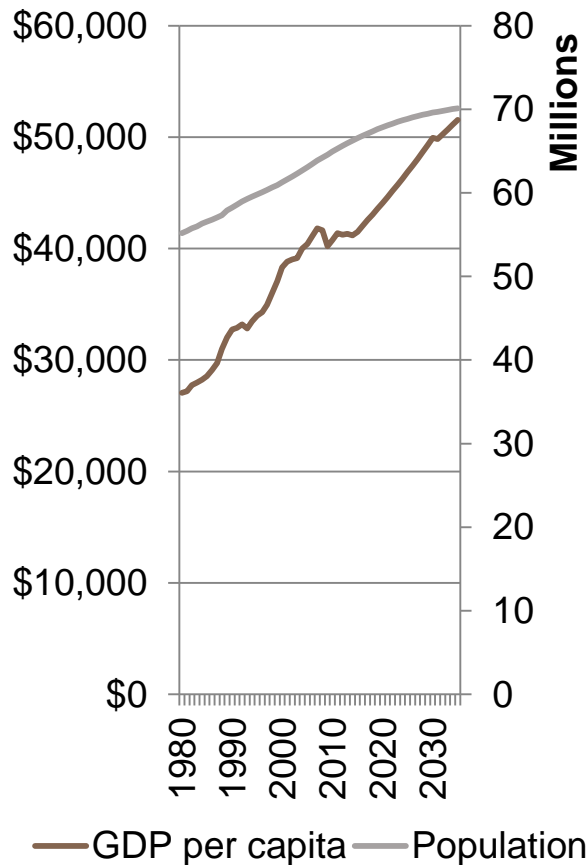
# France Light-Duty Vehicle Market

Sales & fleet projections

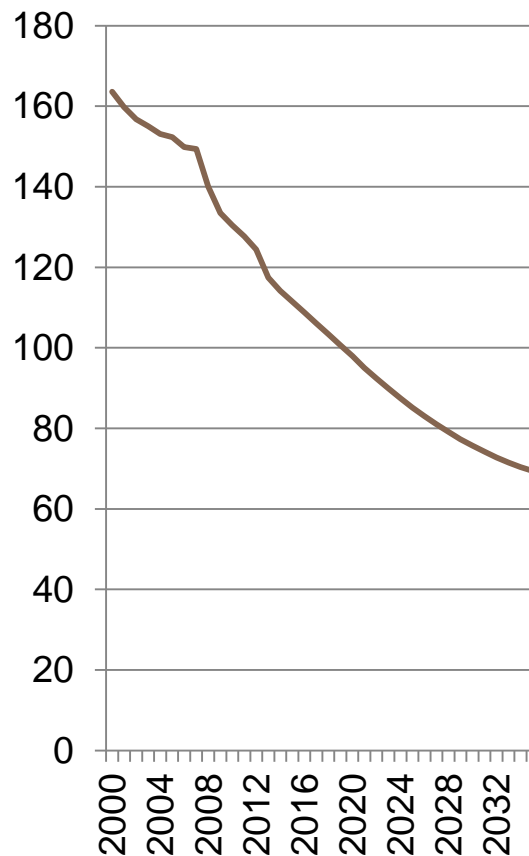


# France GDP, Population, VMT, MPG and Energy

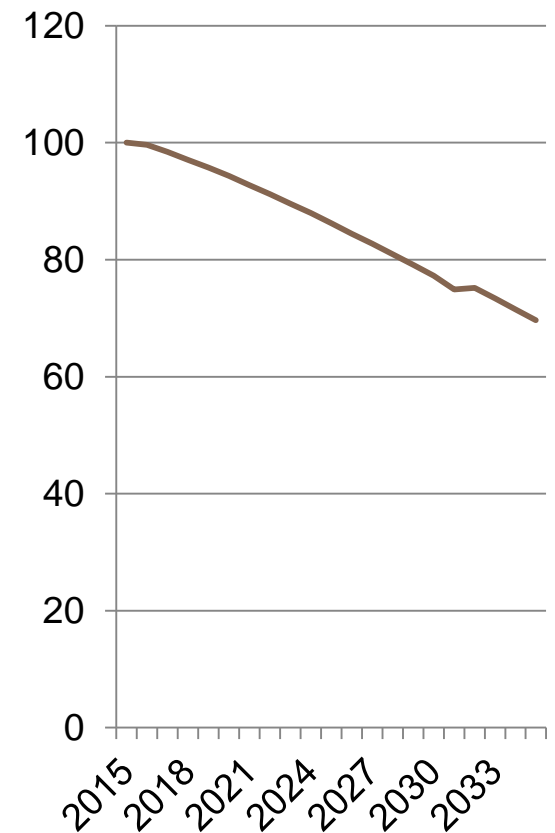
## EU Economy



## Emissions (gCO<sub>2</sub> / km)

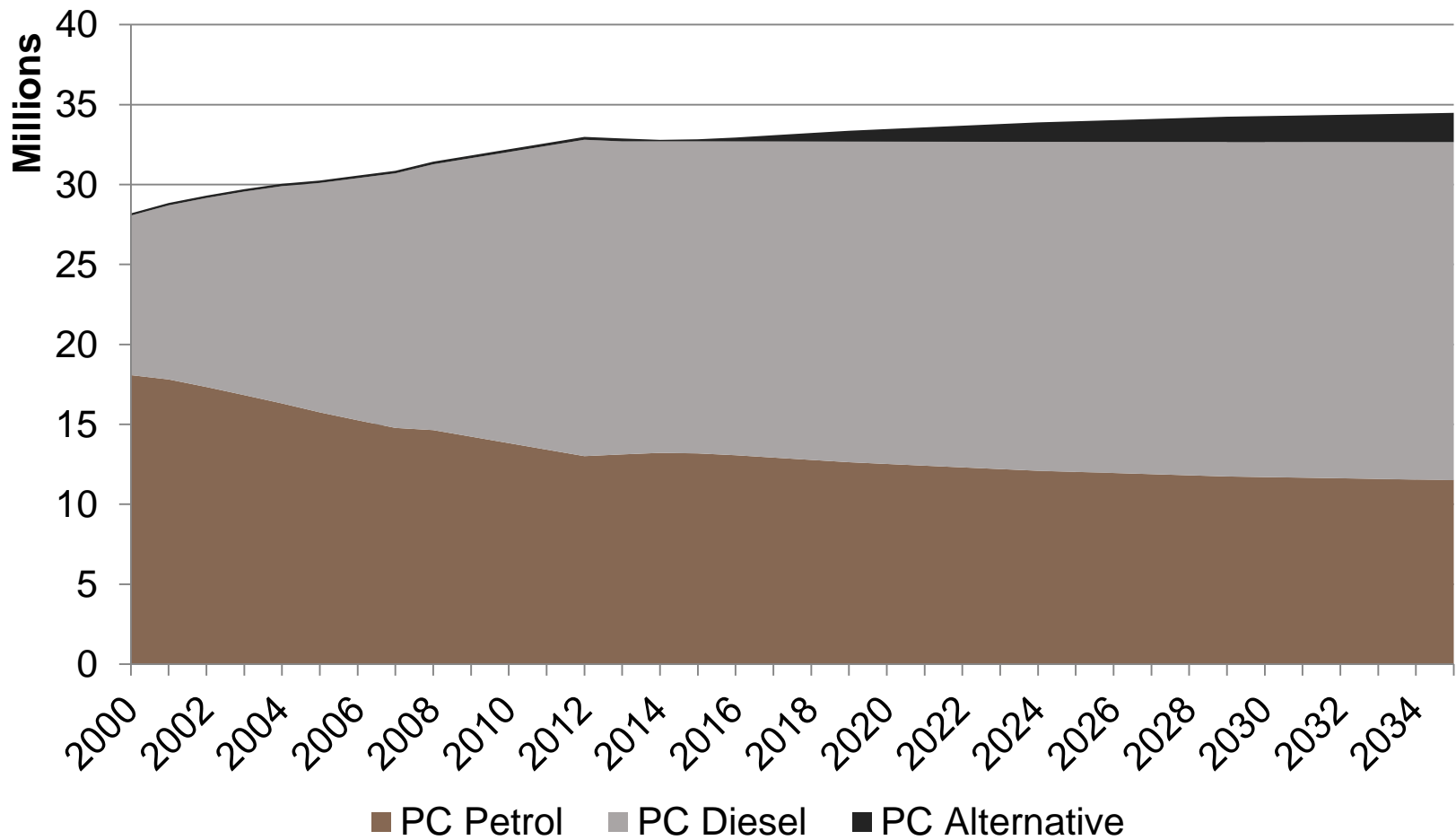


## LDV Energy Demand





# France PC Fleet Forecast by Fuel





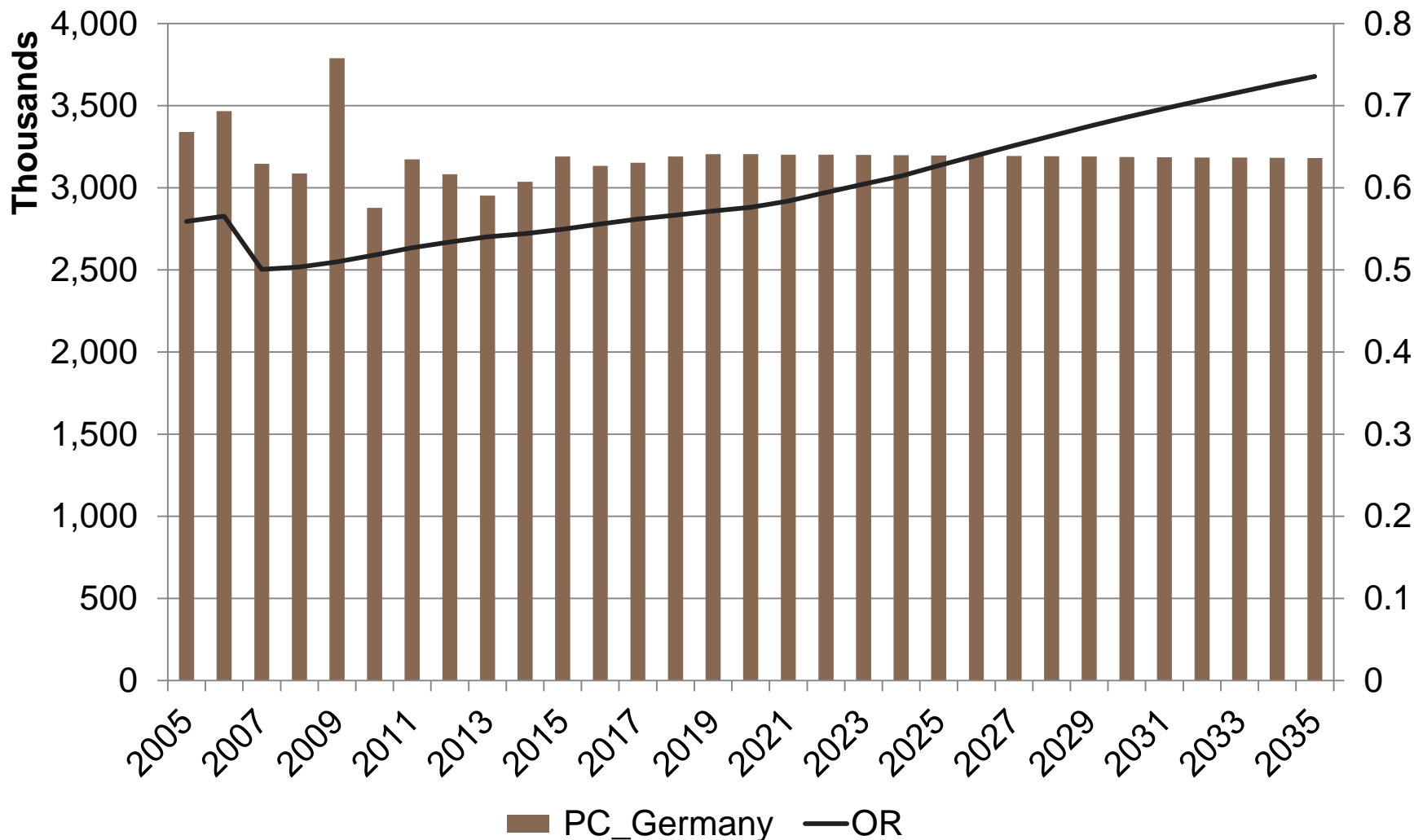
# Germany Light Duty Vehicle Market

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2015 – 2035: Passenger Cars and Light Duty Trucks

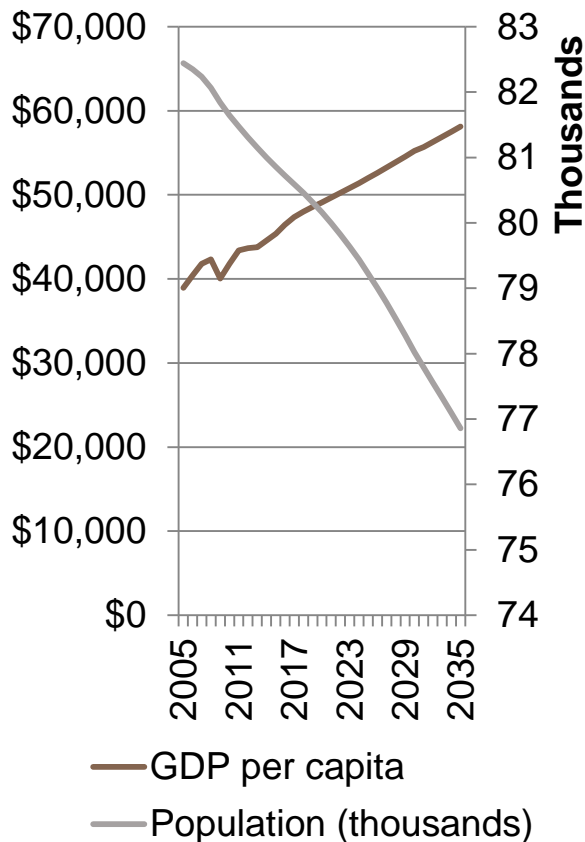
# Germany Light-Duty Vehicle Market

Sales projections

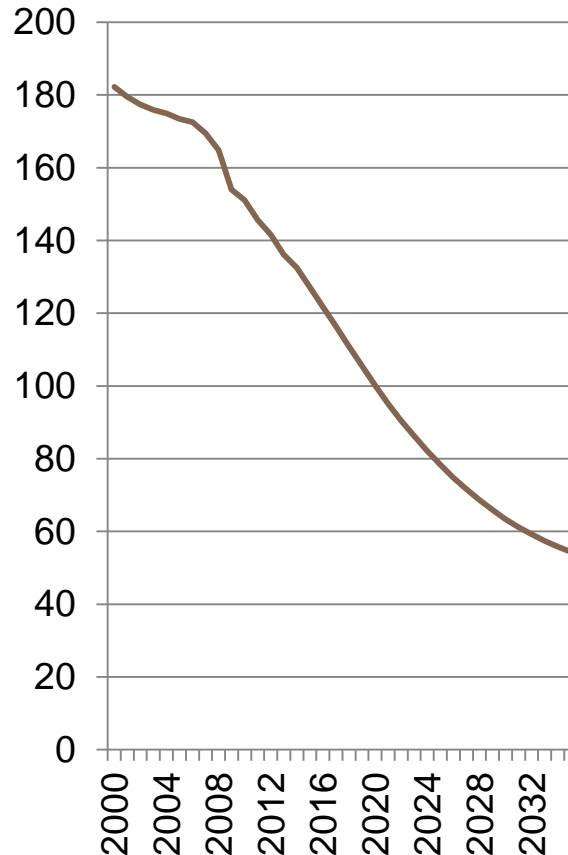


# Germany GDP, Population, VMT, MPG and Energy

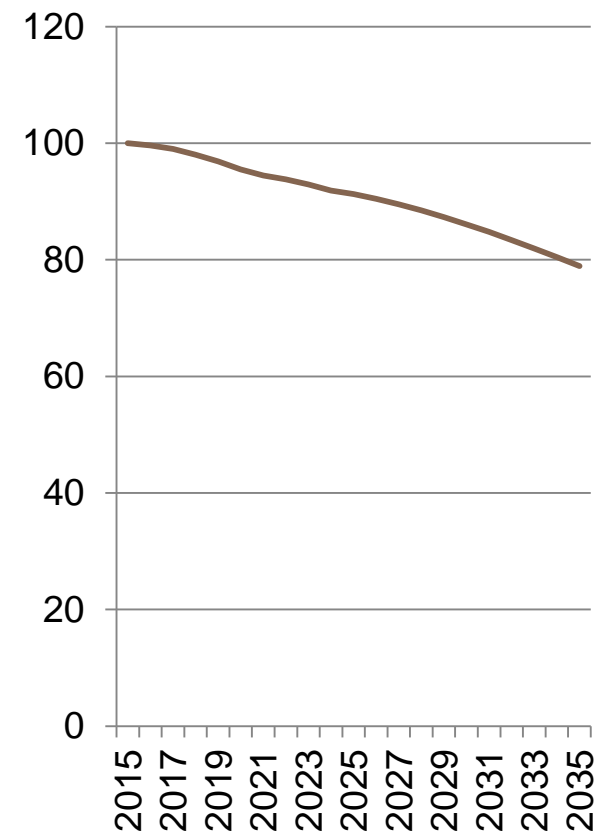
## EU Economy



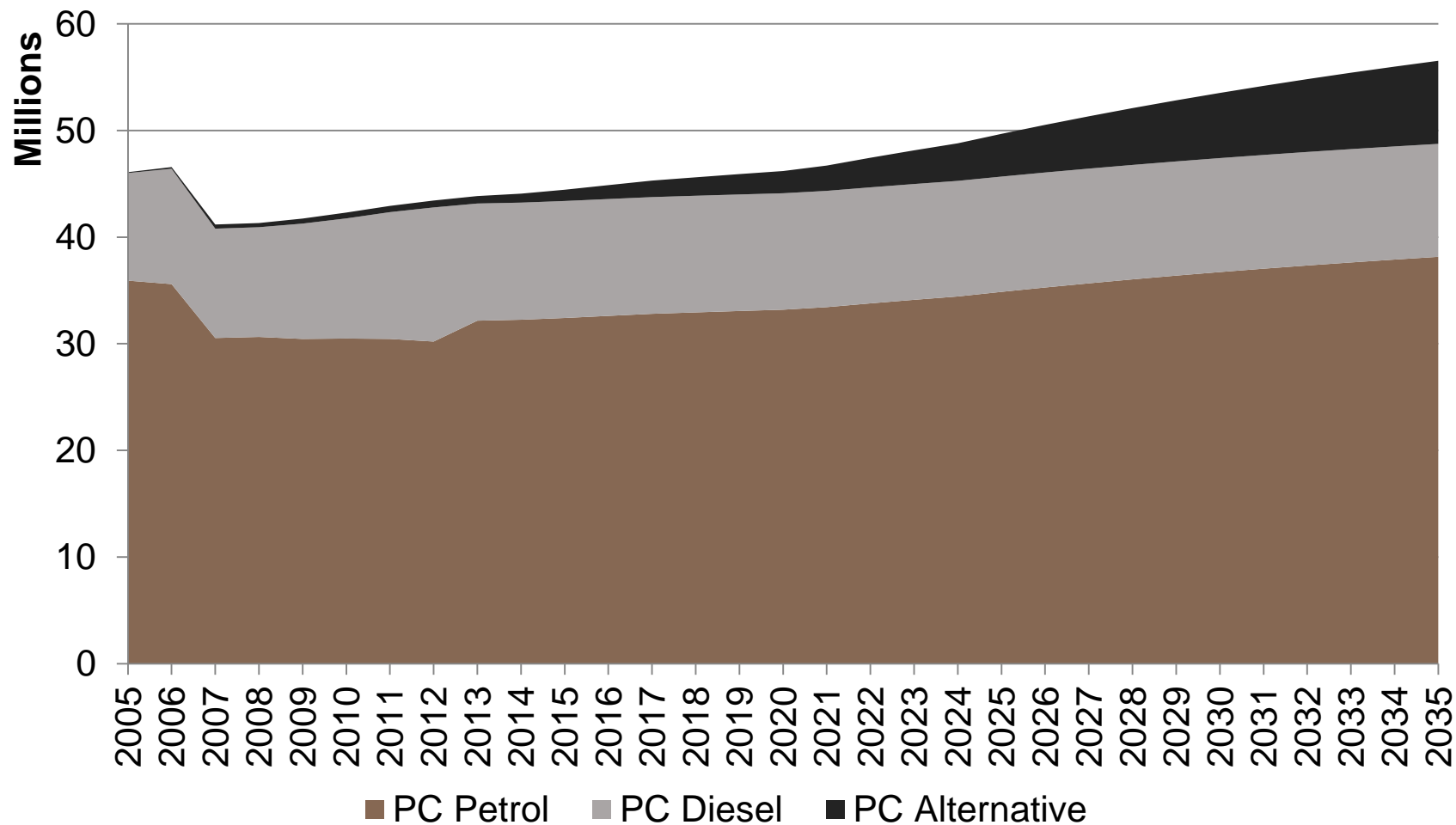
## Emissions (gCO<sub>2</sub> / km)



## LDV Energy Demand



# Germany PC Fleet Forecast by Fuel





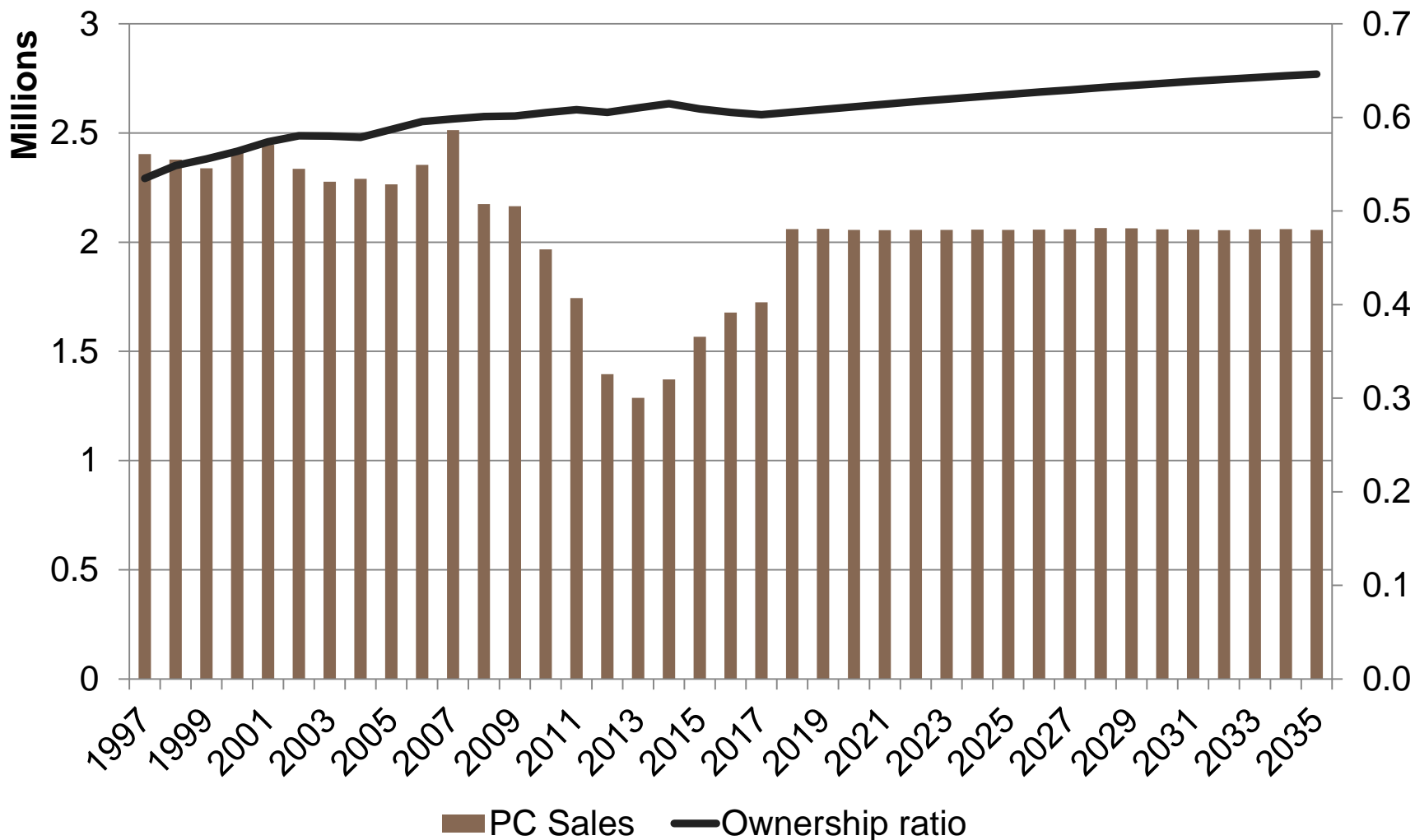
# Italy Light Duty Vehicle Market

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2015 – 2035: Passenger Cars and Light Duty Trucks

# Italy Light-Duty Vehicle Market

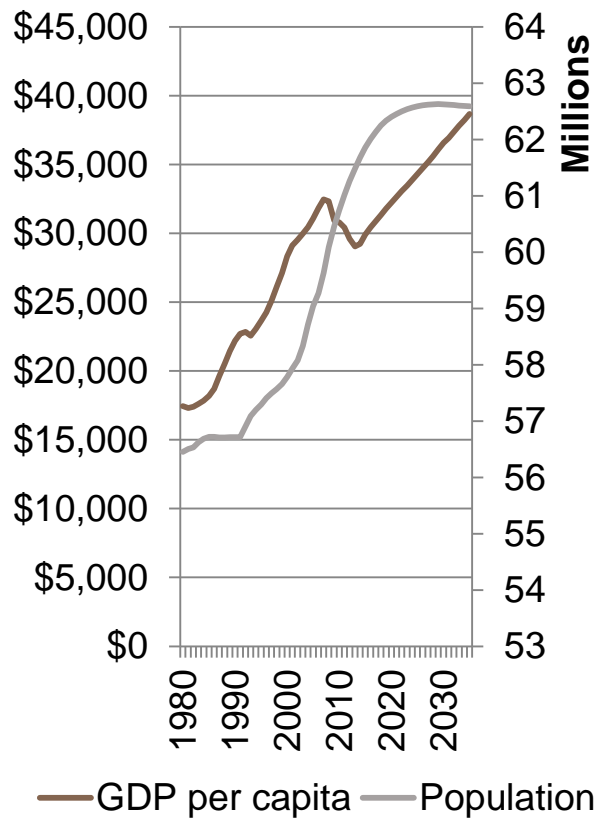
Sales & fleet projections



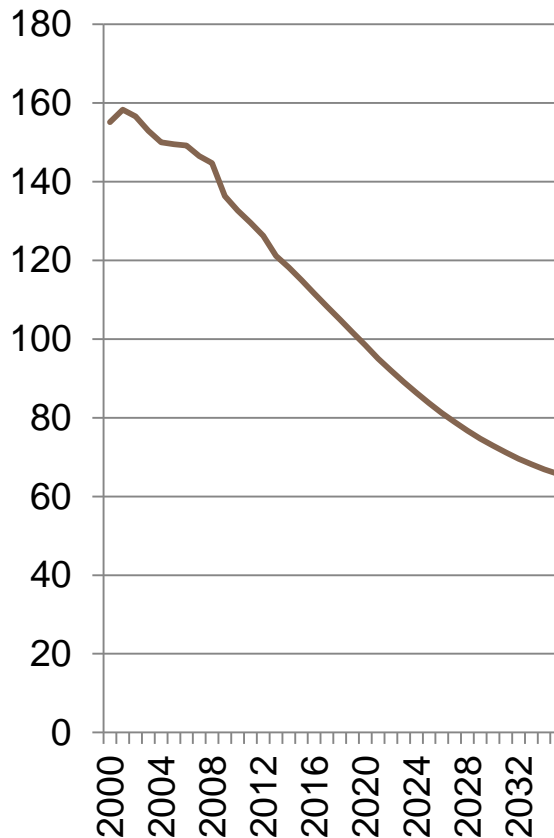


# Italy GDP, Population, VMT, MPG and Energy

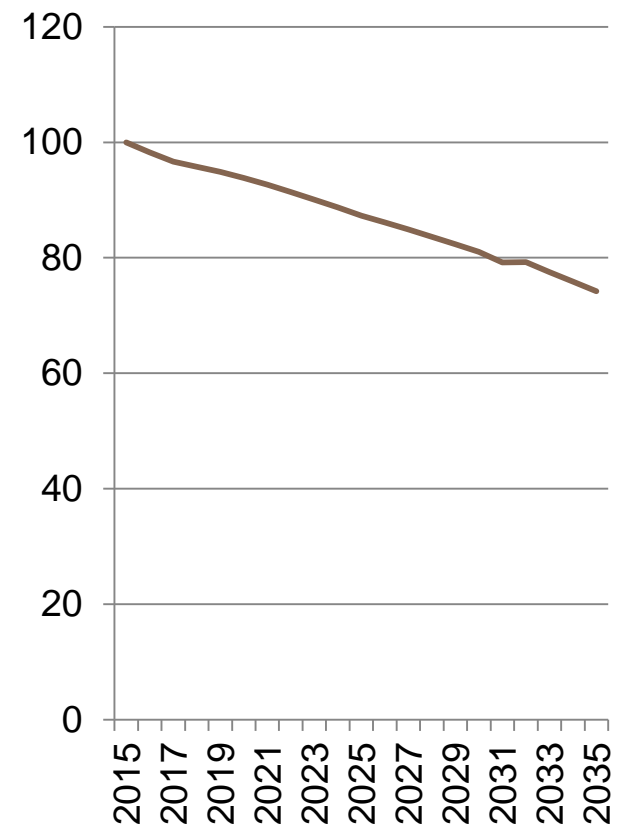
## Italy Economy



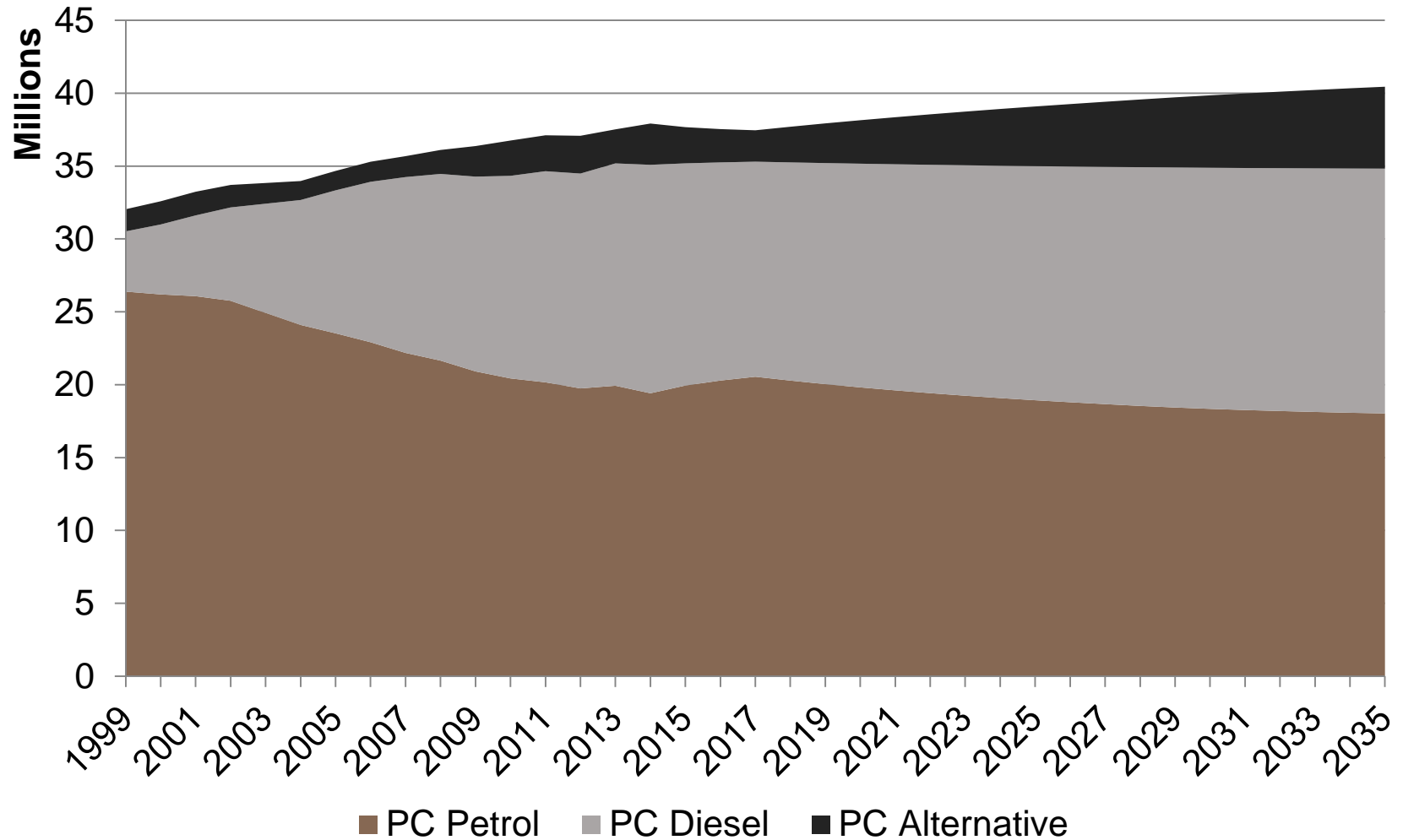
## Emissions (gCO<sub>2</sub> / km)



## LDV Energy Demand



# Italy PC Fleet Forecast by Fuel





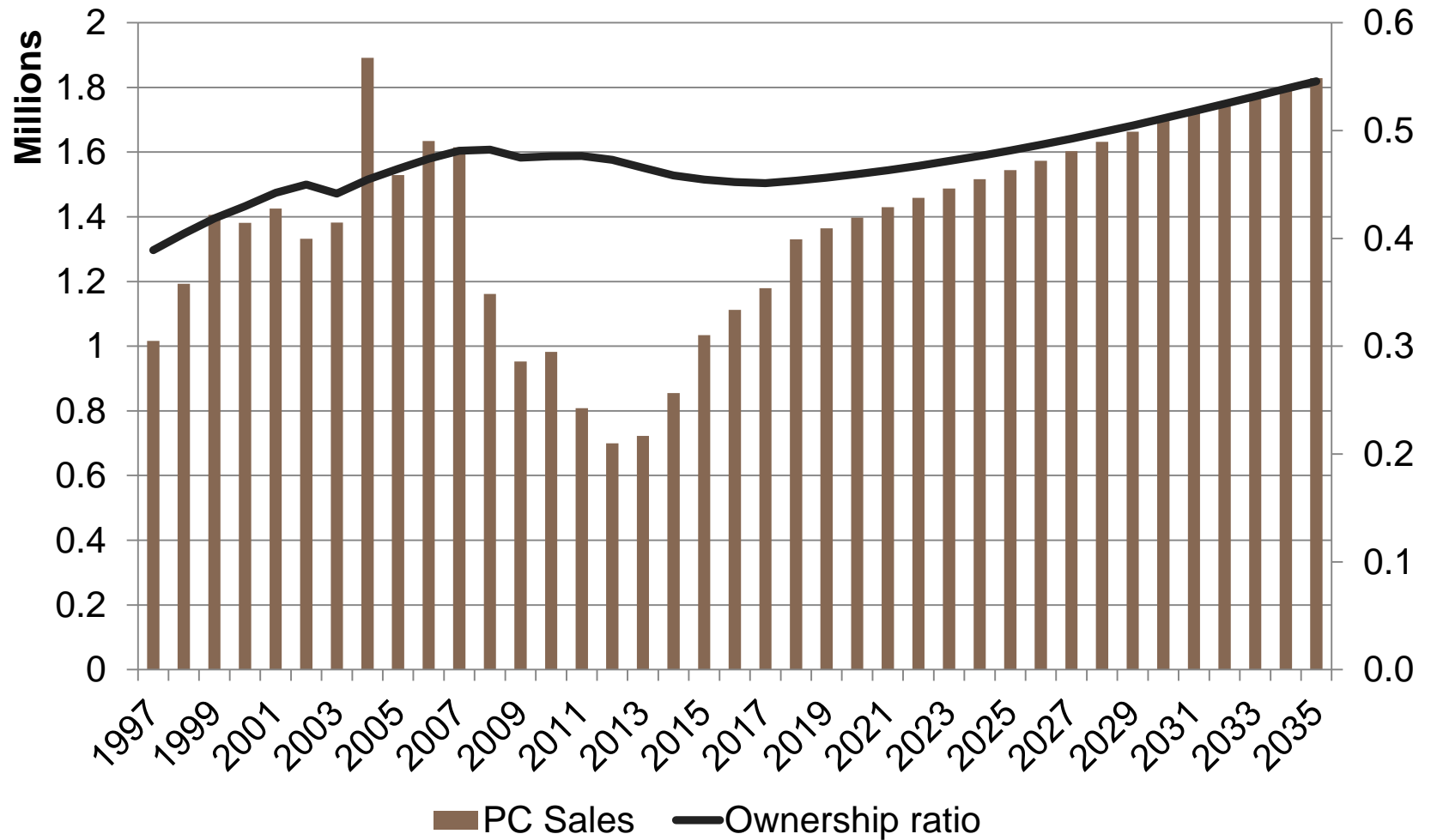
# Spain Light Duty Vehicle Market

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2015 – 2035: Passenger Cars and Light Duty Trucks

# Spain Light-Duty Vehicle Market

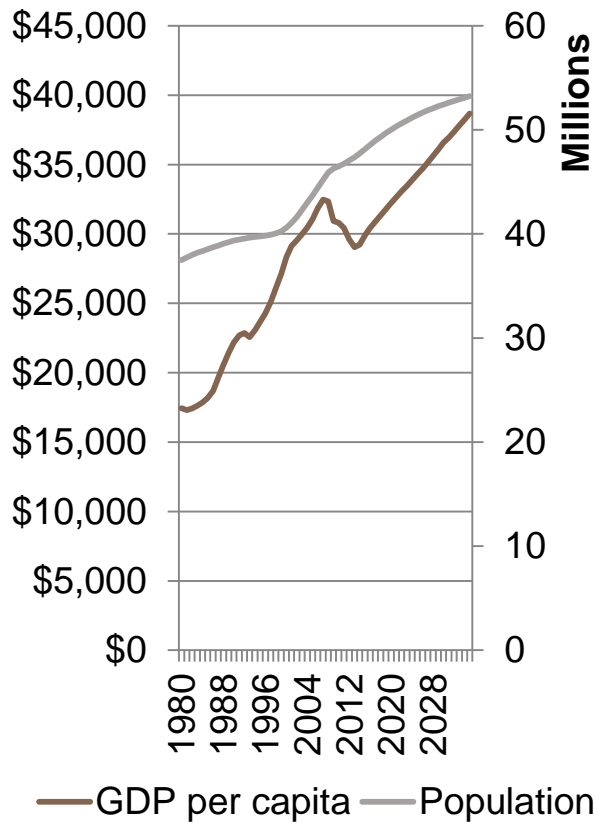
Sales & fleet projections



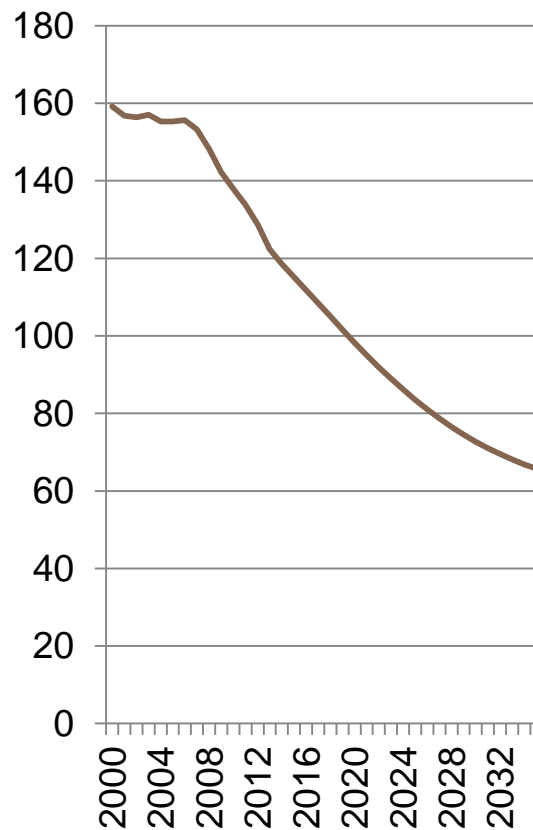
# Spain GDP, Population, VMT, MPG and Energy

Market growing at annual average of X% while population grows at X%

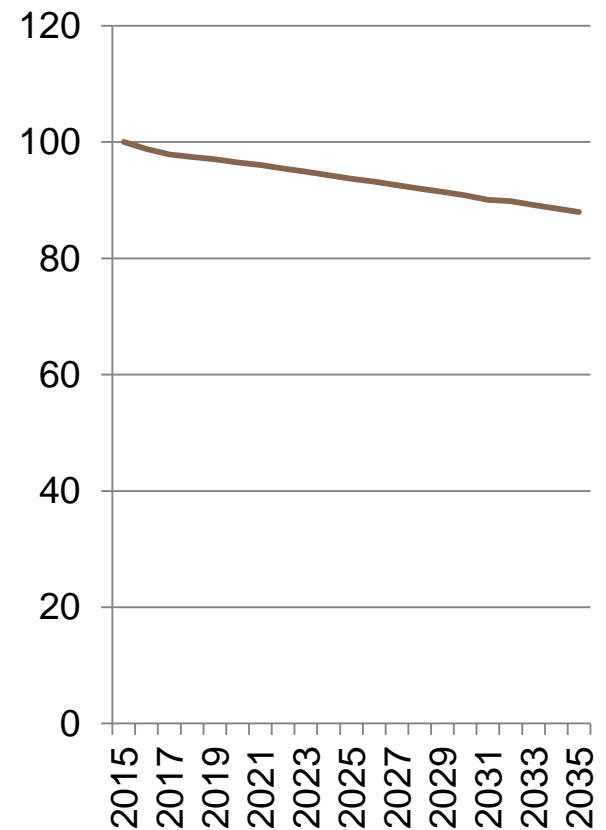
## Spain Economy



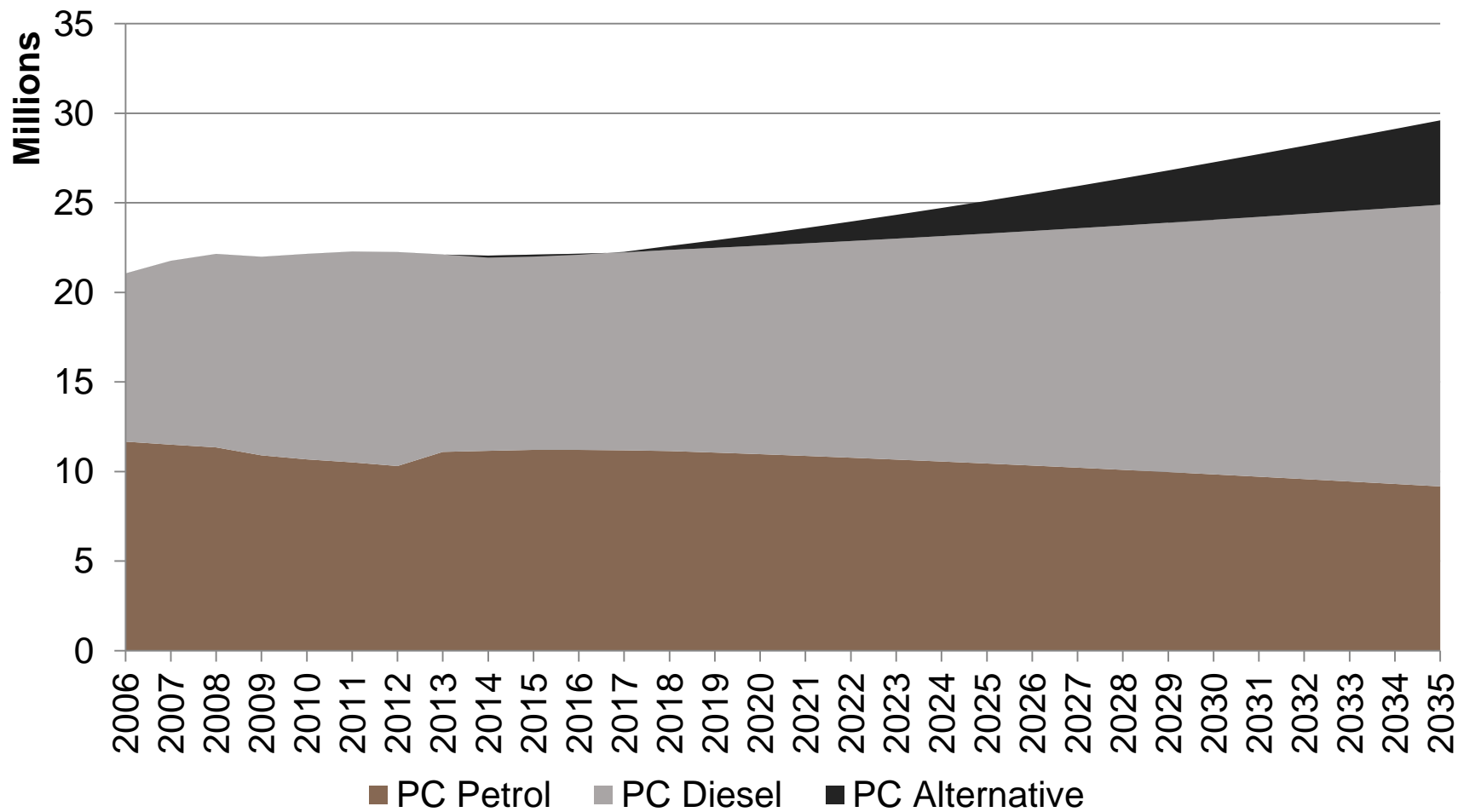
## Emissions (gCO<sub>2</sub> / km)



## LDV Energy Demand



# Spain PC Fleet Forecast by Fuel





# Q & A

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