Future Fleet Trends for the European Automotive Industry

Kuntal Vora | Director
Houston TX, USA
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Agenda

Introduction to the Global Automotive Service

EU Light Duty Vehicle Market

Country Insights – Germany, Spain, France & Italy

Conclusions

Q & A
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

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.

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

2015 – 2035: Passenger Cars and Light Duty Trucks
EU Light-Duty Vehicle Market

Sales projections for EU15 + EFTA – ownership ratio approximately 0.51

PC Sales
Ownership ratio

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EU GDP, Population, VMT, MPG and Energy

EU Economy

GDP per capita - Population

Emissions (gCO₂ / km)

LDV Energy Demand

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EU PC Fleet Forecast by Fuel

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

PC Petrol  PC Diesel  PC Alternative
France Light Duty Vehicle Market

2015 – 2035: Passenger Cars and Light Duty Trucks
France Light-Duty Vehicle Market

Sales & fleet projections

[Graph showing PC Sales and Ownership ratio from 1990 to 2034]

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France GDP, Population, VMT, MPG and Energy

**EU Economy**
- GDP per capita
- Population

**Emissions (gCO₂/km)**
- 2000: 180
- 2004: 160
- 2008: 140
- 2012: 120
- 2016: 100
- 2020: 80
- 2024: 60
- 2028: 40
- 2032: 20

**LDV Energy Demand**
- 2015: 120
- 2018: 100
- 2021: 80
- 2024: 60
- 2027: 40
- 2030: 20
- 2033: 0
France PC Fleet Forecast by Fuel
Germany Light Duty Vehicle Market

2015 – 2035: Passenger Cars and Light Duty Trucks
Germany Light-Duty Vehicle Market

Sales projections

Thousands

PC_Germany  OR
Germany GDP, Population, VMT, MPG and Energy

EU Economy

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Emissions (gCO₂ / km)

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LDV Energy Demand

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Germany PC Fleet Forecast by Fuel

![Graph showing the forecast of PC fleet by fuel type from 2005 to 2035. The graph compares PC Petrol, PC Diesel, and PC Alternative over the years. The forecast indicates a steady increase in the number of PC Petrol vehicles and a decrease in PC Diesel vehicles, with PC Alternative gaining in popularity by 2035.](image-url)
Italy Light Duty Vehicle Market

2015 – 2035: Passenger Cars and Light Duty Trucks
Italy Light-Duty Vehicle Market

Sales & fleet projections

PC Sales  Ownership ratio

Millions

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Italy GDP, Population, VMT, MPG and Energy

**Italy Economy**

- GDP per capita vs. Population
- GDP, Population, VMT, MPG, and Energy trends over time (1980-2035)

**Emissions (gCO₂ / km)**

- Emissions decreasing over time (2000-2032)

**LDV Energy Demand**

- Energy demand for light-duty vehicles decreasing over time (2015-2035)
Italy PC Fleet Forecast by Fuel

- PC Petrol (brown)
- PC Diesel (gray)
- PC Alternative (black)

Years: 1999 to 2035

Units: Millions
Spain Light Duty Vehicle Market

2015 – 2035: Passenger Cars and Light Duty Trucks
Spain Light-Duty Vehicle Market

Sales & fleet projections

PC Sales
Ownership ratio

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Spain GDP, Population, VMT, MPG and Energy

Market growing at annual average of X% while population grows at X%
Spain PC Fleet Forecast by Fuel

PC Petrol  PC Diesel  PC Alternative
Contact Information

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