

DATAFORCE

Wir zählen Autos.

Fleetmarket Trends 2018

International Fleet Meeting Geneva

07.03.2018 Marc A. Odinius – Managing Director - Dataforce GmbH

Agenda

- **Will the year start like the the previous year ended?**
- **SUV no longer a trend?!**
- **Diesel = Fleet – Fleet = Diesel?!**
- **What if Szenarios:**
 - ... Diesel never exisited
 - ... what about NOx
 - ... the CO2 target of 95g in 2021 will be met
- **Will the marketshare of fleet rise to 100%**

new beginning

progress

luck

18

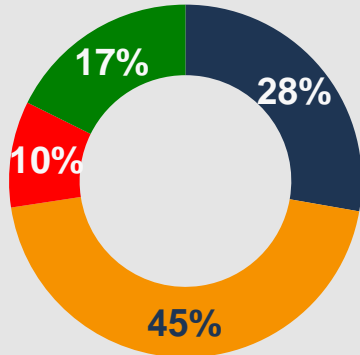
striving forward

success

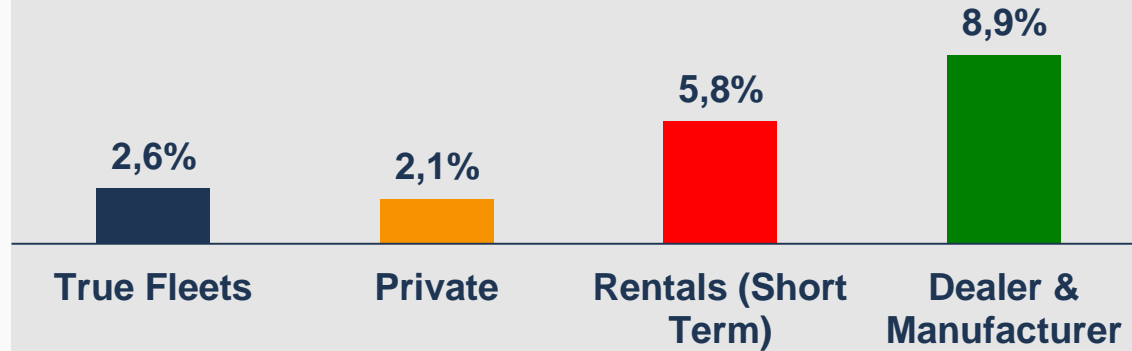
The PC Market 2017

Passenger Car Registrations EU-15

Distribution of new registrations



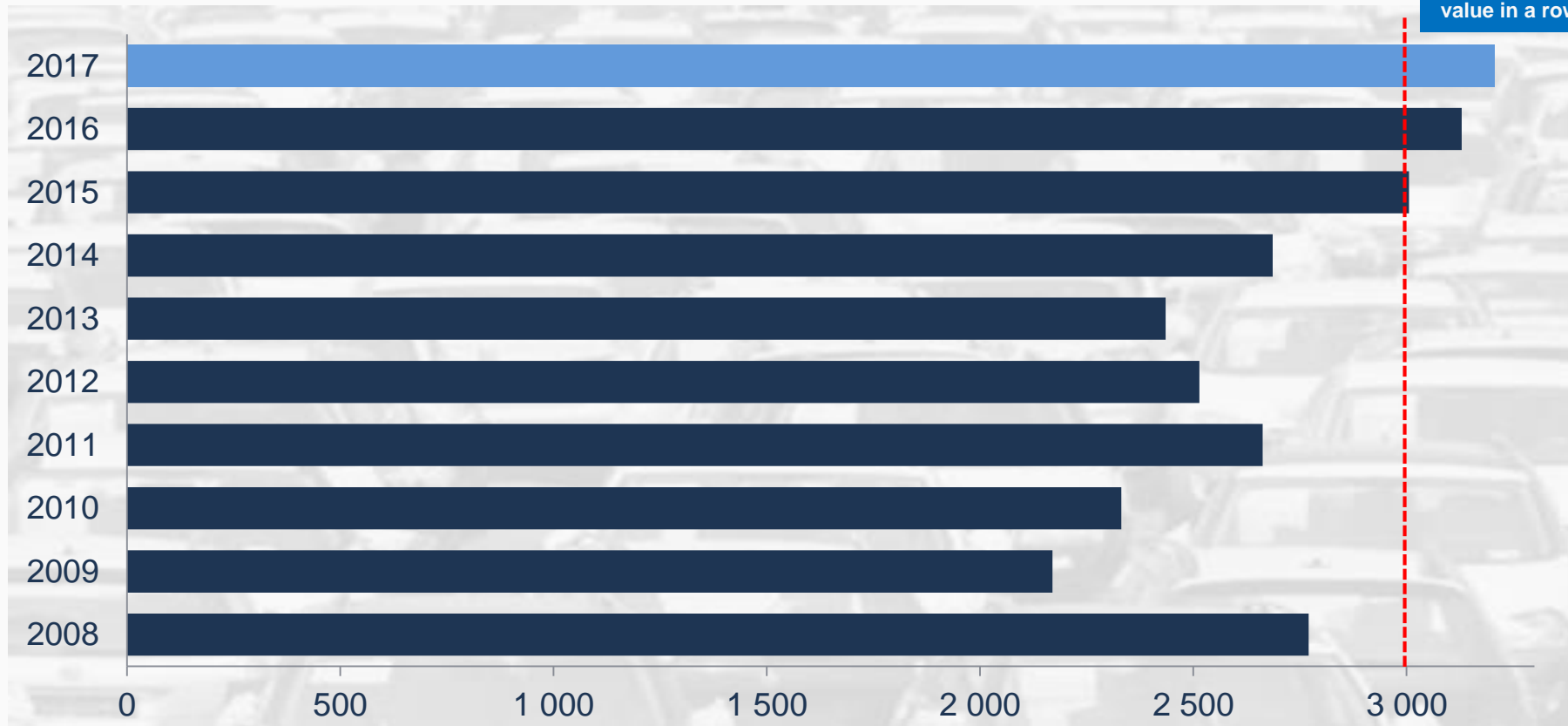
Development of new registrations



EU15: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, UK

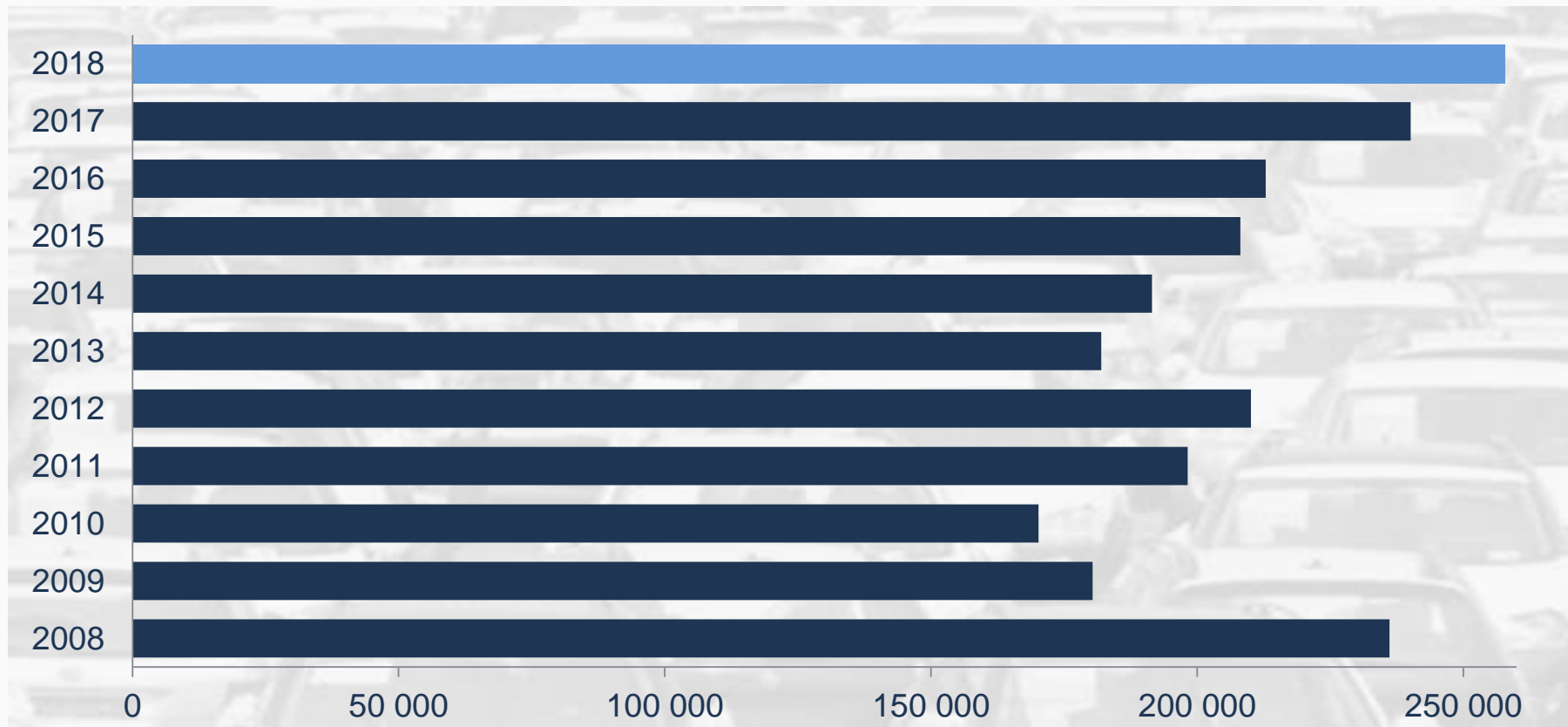
True Fleets in the EU-7

Passenger Car Registrations (January – December) in thousand



Very good start to 2018

Passenger Car fleet registrations January



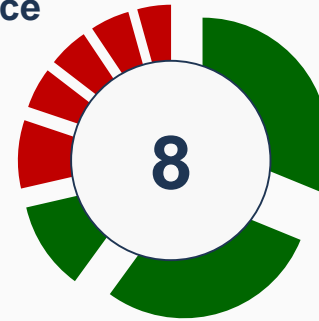
Number of brands covering 80% of the fleet market

Germany, France, Italy and Switzerland in 2017

Germany



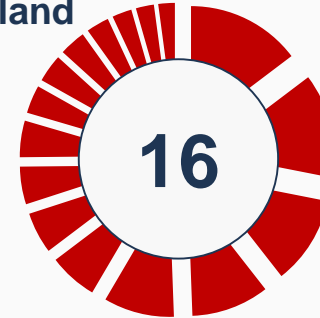
France




Italy



Switzerland

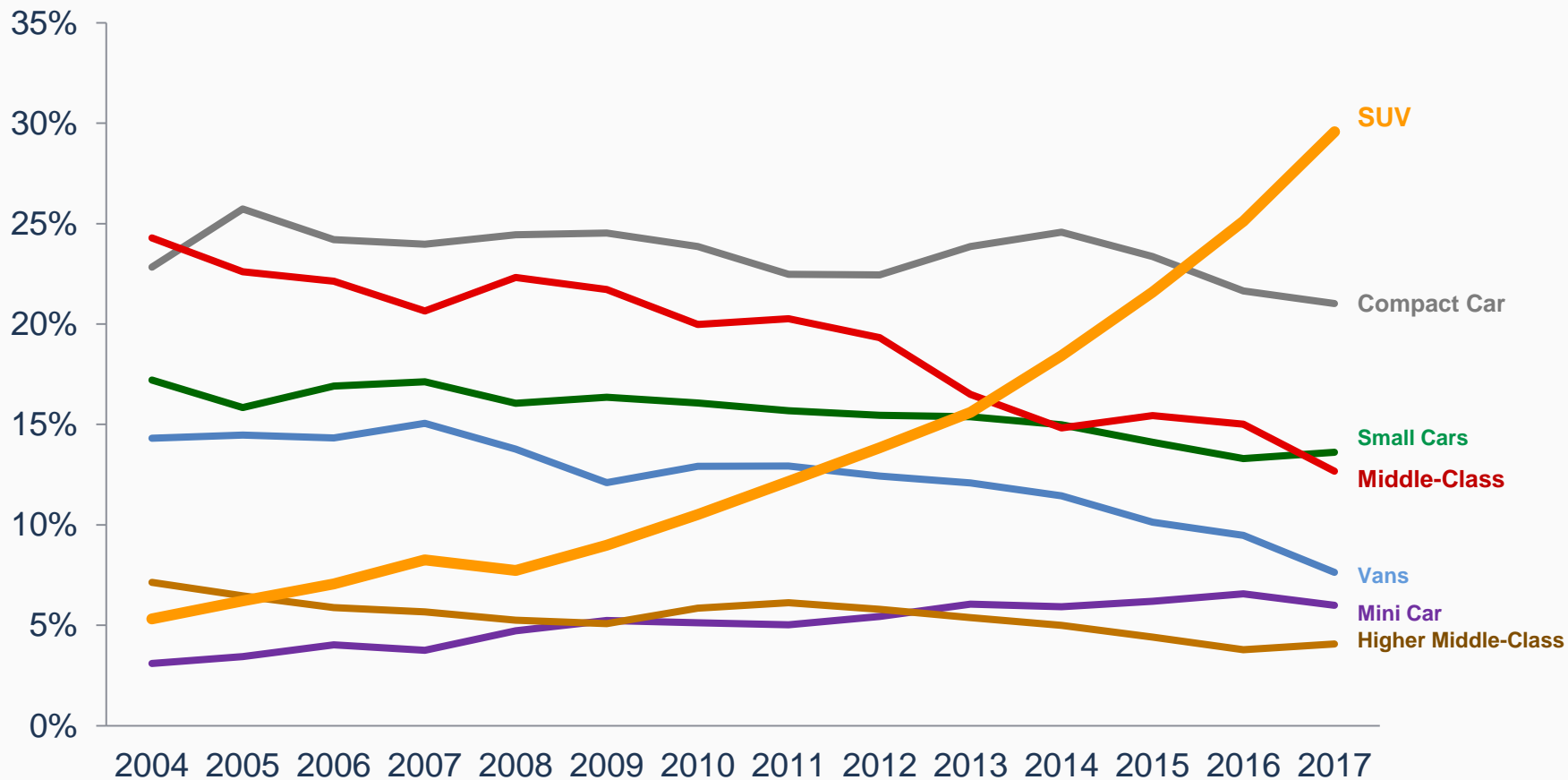


 Domestic brand
 Foreign brand

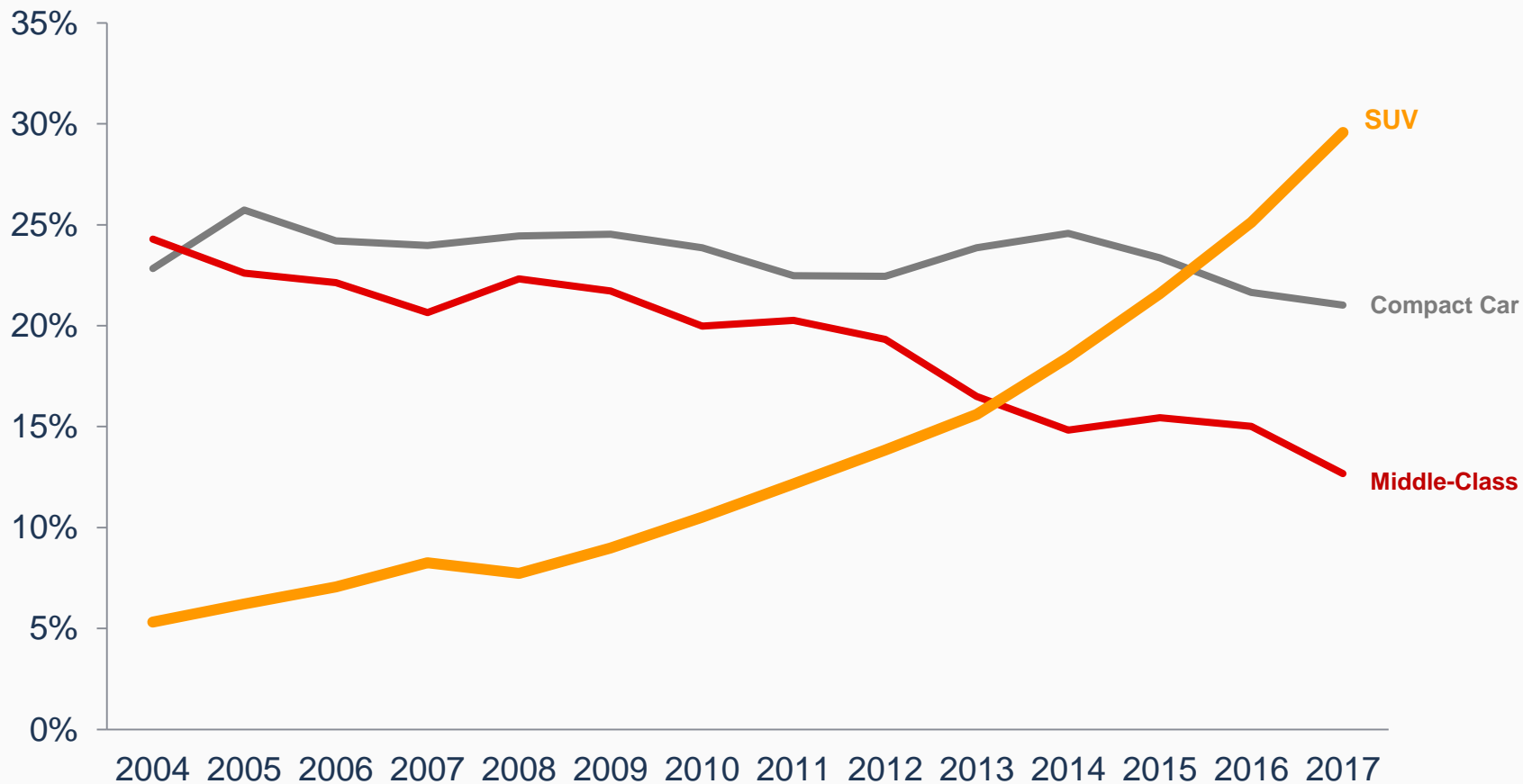


SUV no longer a trend?!

Development of Vehicle Segements in EU-7 True Fleets



Development of Vehicle Segements in EU-7 True Fleets



Growing model diversity of SUVs

Models with significant volume in 2017 with market introduction after 2014

Compact Cars

Fiat Tipo
Hyundai Ioniq
Infiniti Q30

Middle Class

Alfa Romeo Giulia
Jaguar XE
Renault Talisman
VW Arteon

Vans

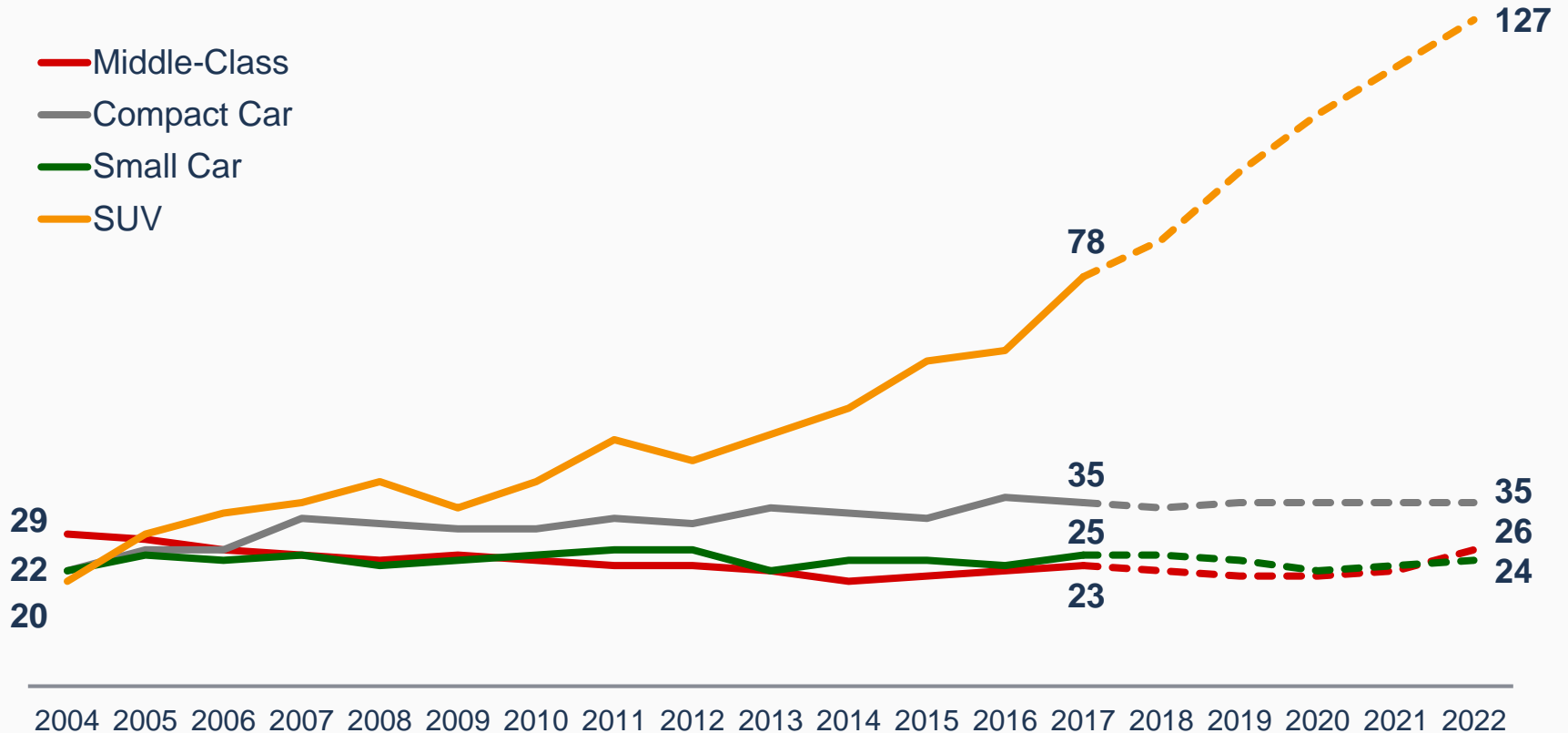
BMW 2 Series
Gran Tourer

SUV

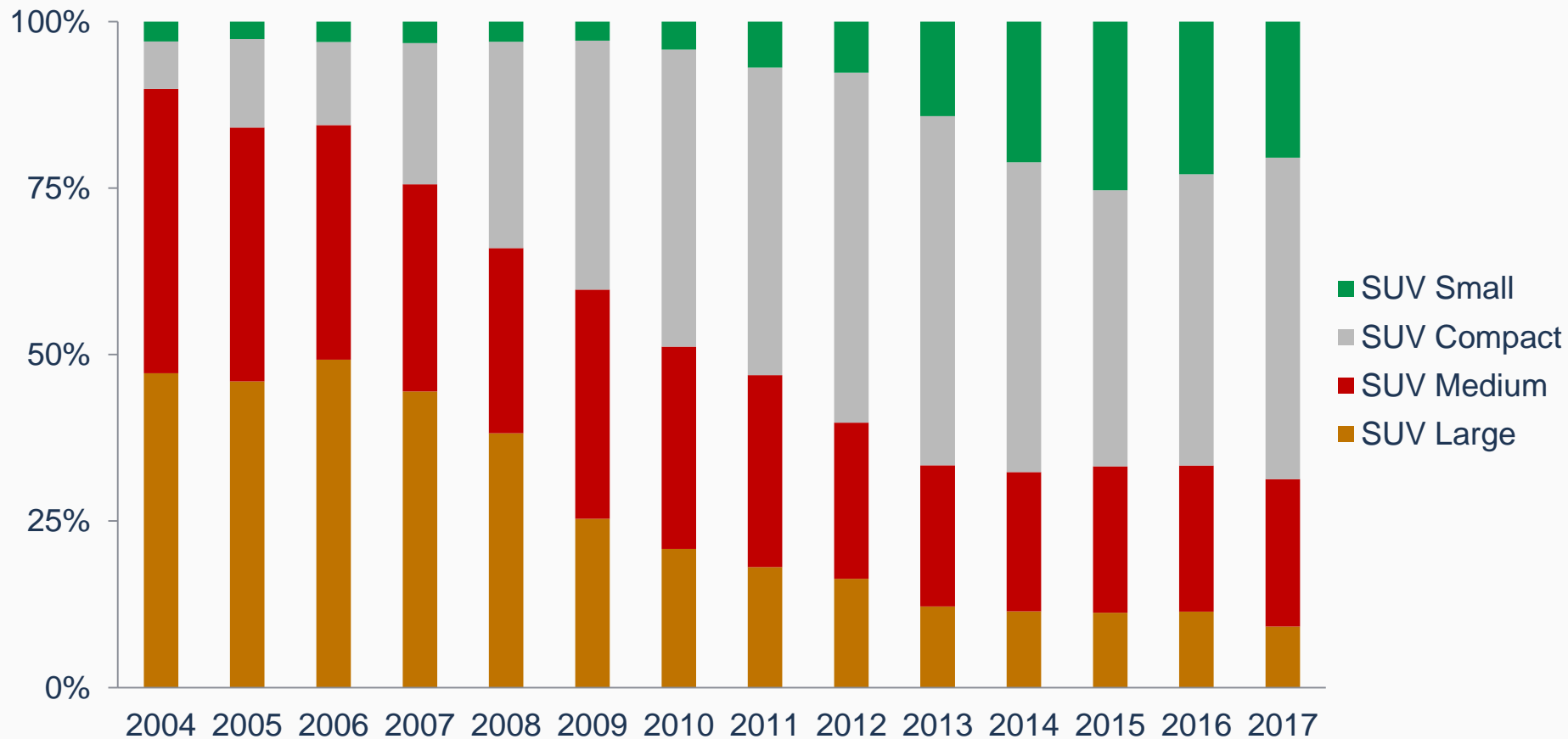
Alfa Romeo Stelvio	Maserati Levante
<i>Audi Q2</i>	Mazda CX-3
Fiat 500X	Opel Crossland X
Ford Edge	Renault Kadjar
Honda HR-V	<i>Seat Ateca</i>
Hyundai Tucson	<i>Skoda Karoq</i>
Jaguar F-Pace	<i>Skoda Kodiaq</i>
Kia Niro	Suzuki Vitara
LR Discovery Sport	Ssangyong Tivoli XLV
Mercedes GLC Coupé	Tesla Model X
Mercedes GLE Coupé	Toyota C-HR

Comparison SUVs with Small, Compact Cars and Middle-Class

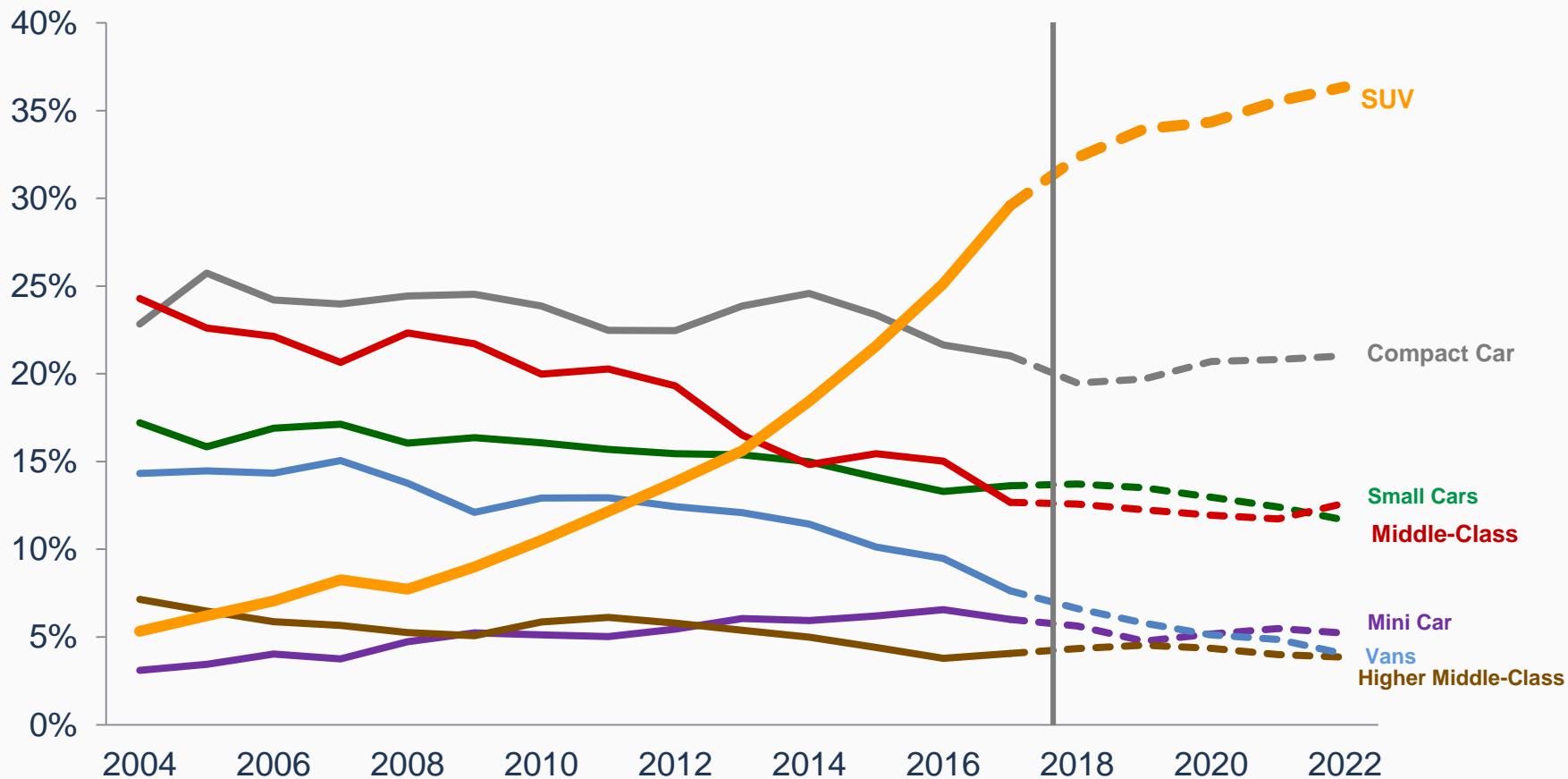
Number of models with more than 1,200 registrations per year in True Fleets



Development of Vehicle Segements in EU-7 True Fleets

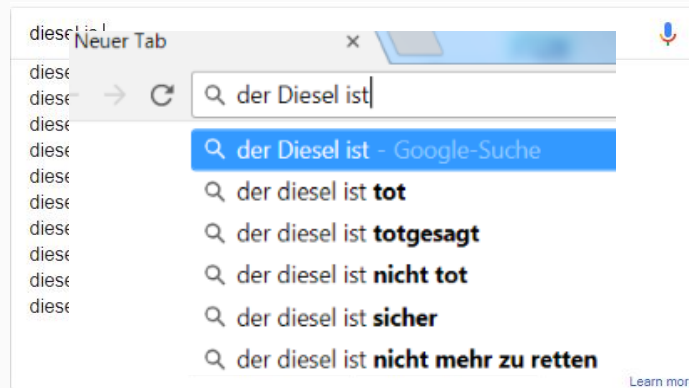


Development of Vehicle Segements in EU-7 True Fleets



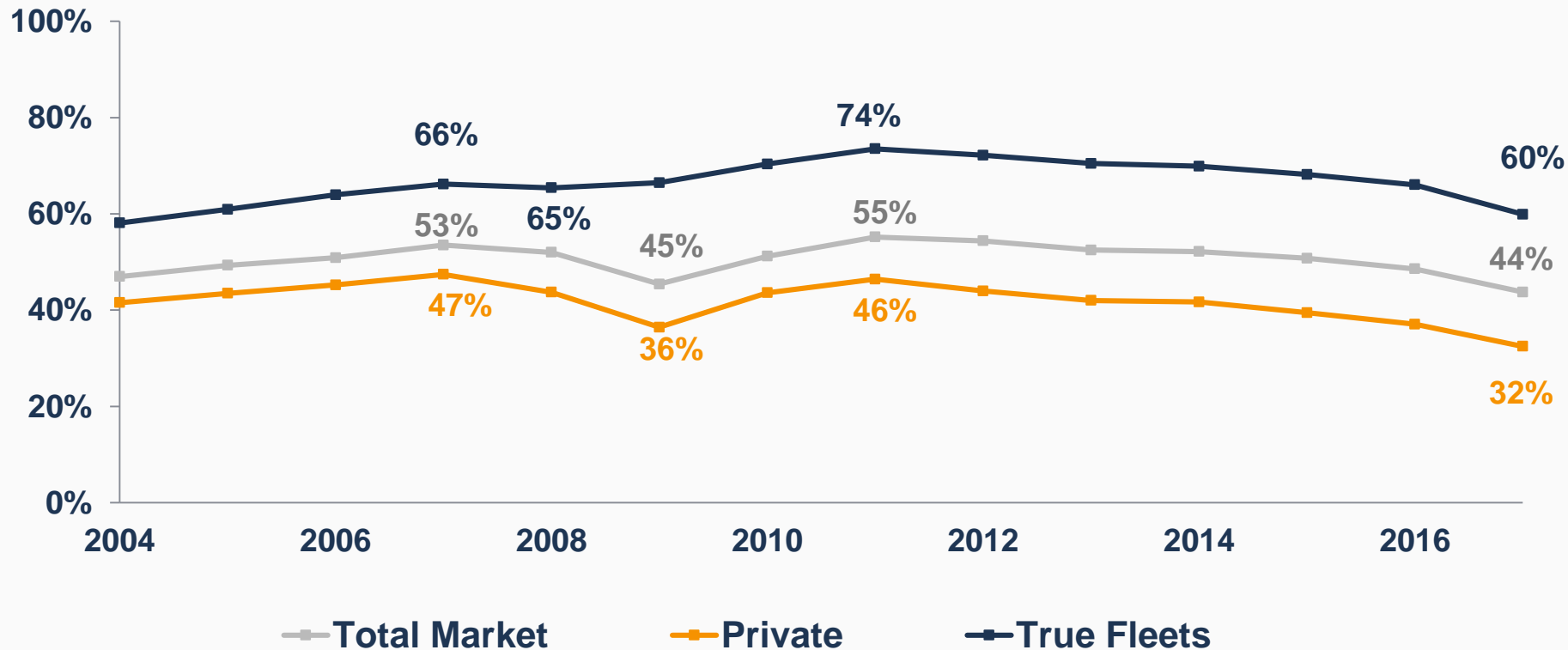


Diesel = Fleet – Fleet = Diesel



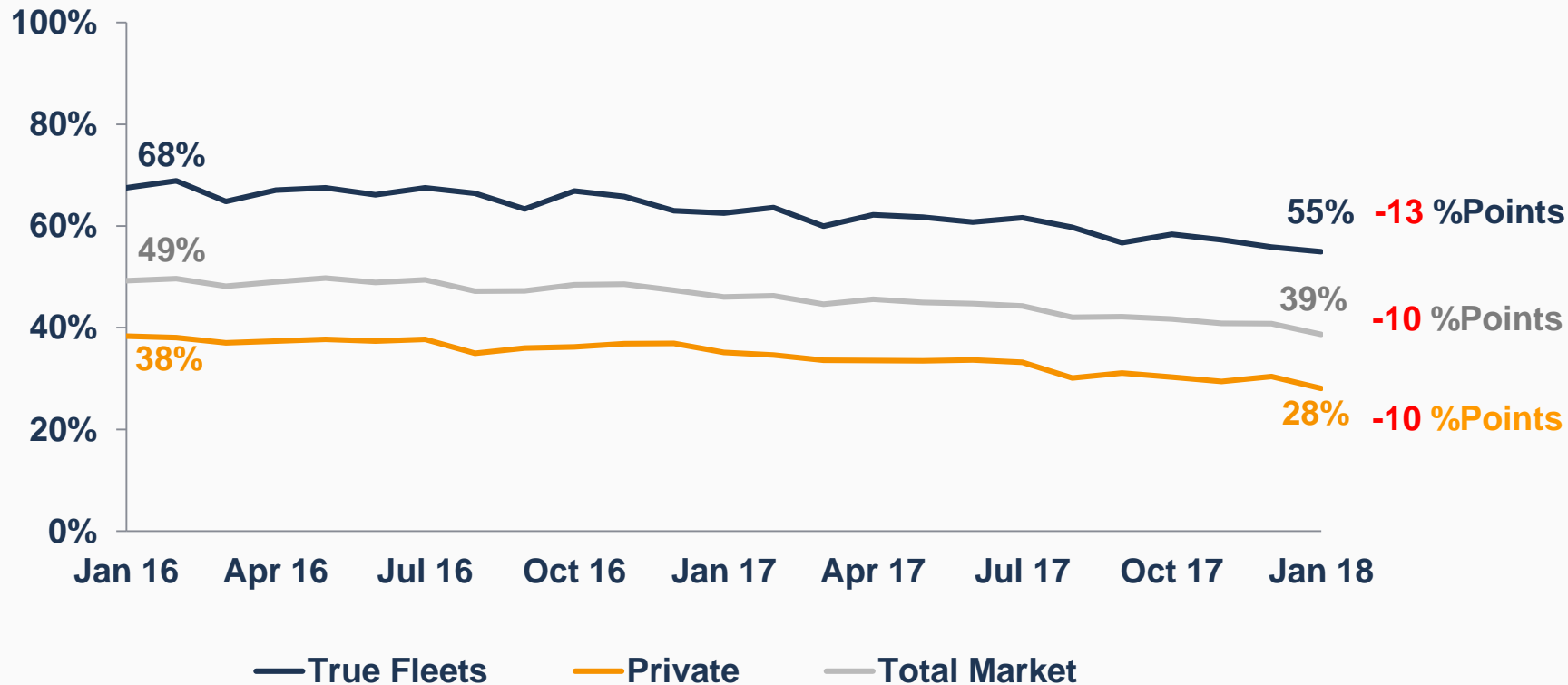
Development of Diesel share since 2004

Passenger Car Registrations EU-15



Development of Diesel share in detail since 2016

Passenger Car Registrations EU-15



Dieselanalysis 2017

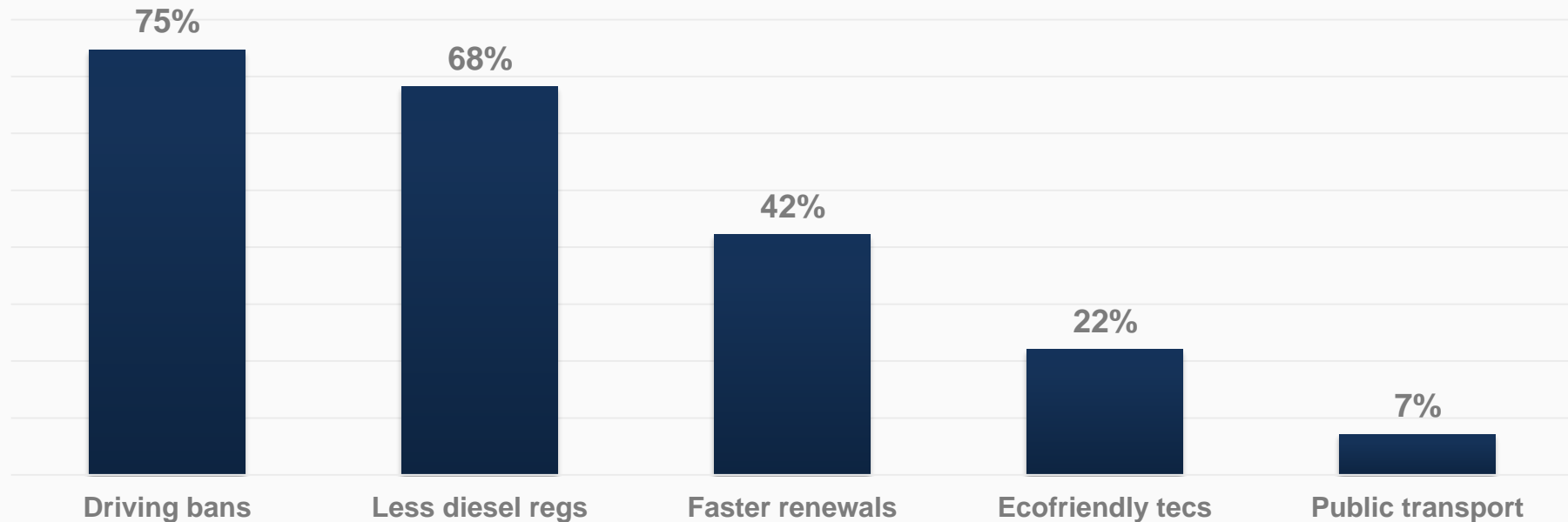


CourtNOx

SpeedSurvey: What changes do you expect from the court rule?

154 fleet managers

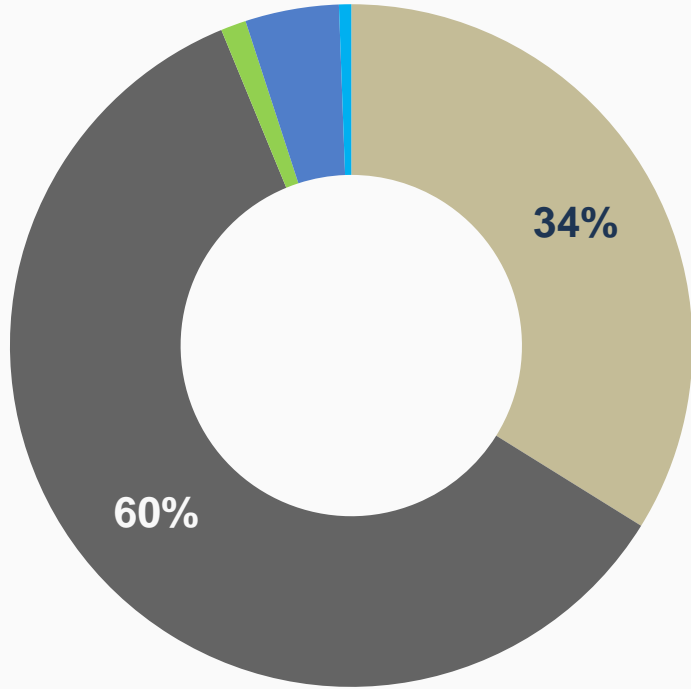
Welche Änderungen erwarten Sie durch dieses Urteil?



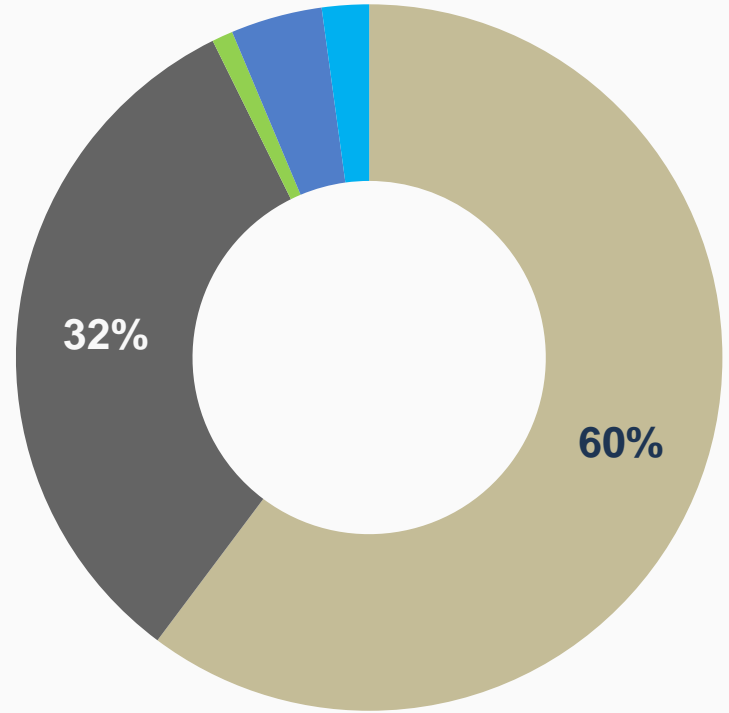
Similarities & Differences in the Fueltype Distribution

Fuel Type shares of Passenger Car registrations EU-15

True Fleets



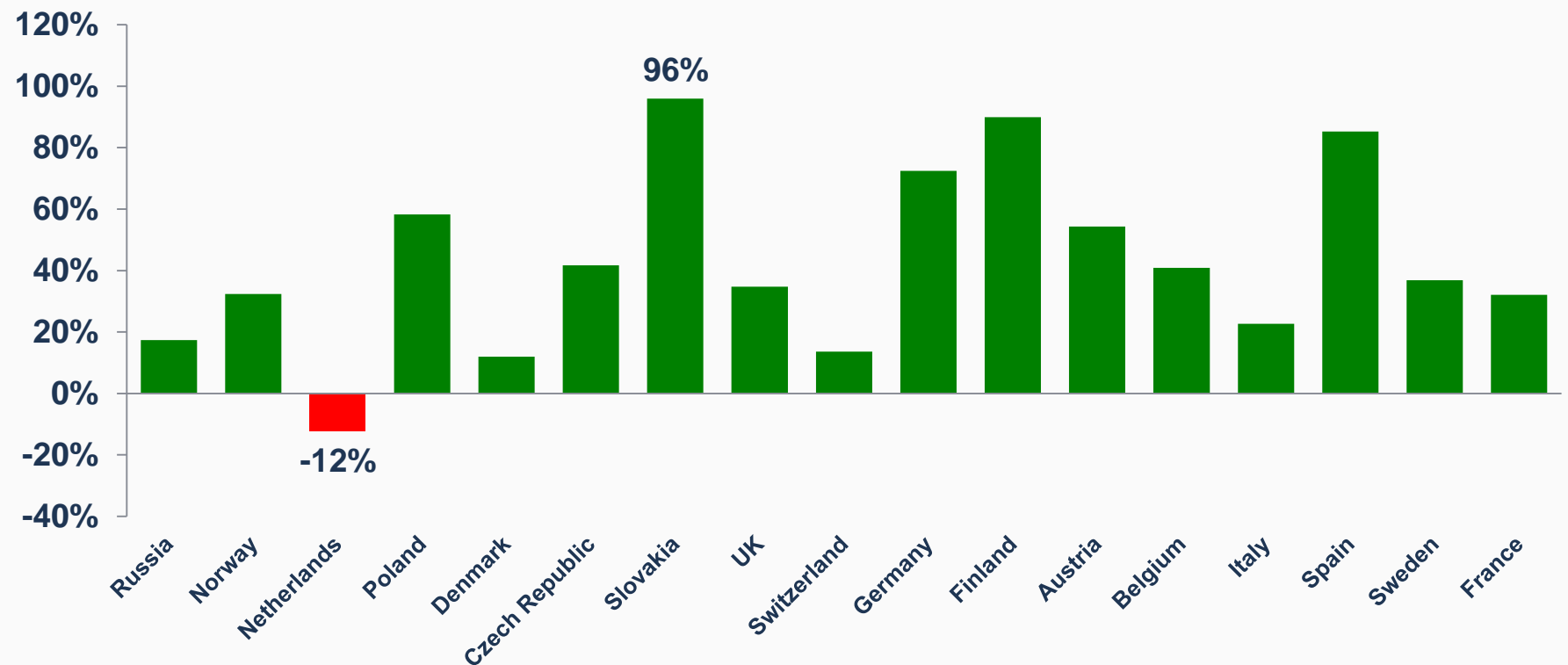
Private Market



- Petrol
- Diesel
- Electric
- Hybrid
- CNG/LPG

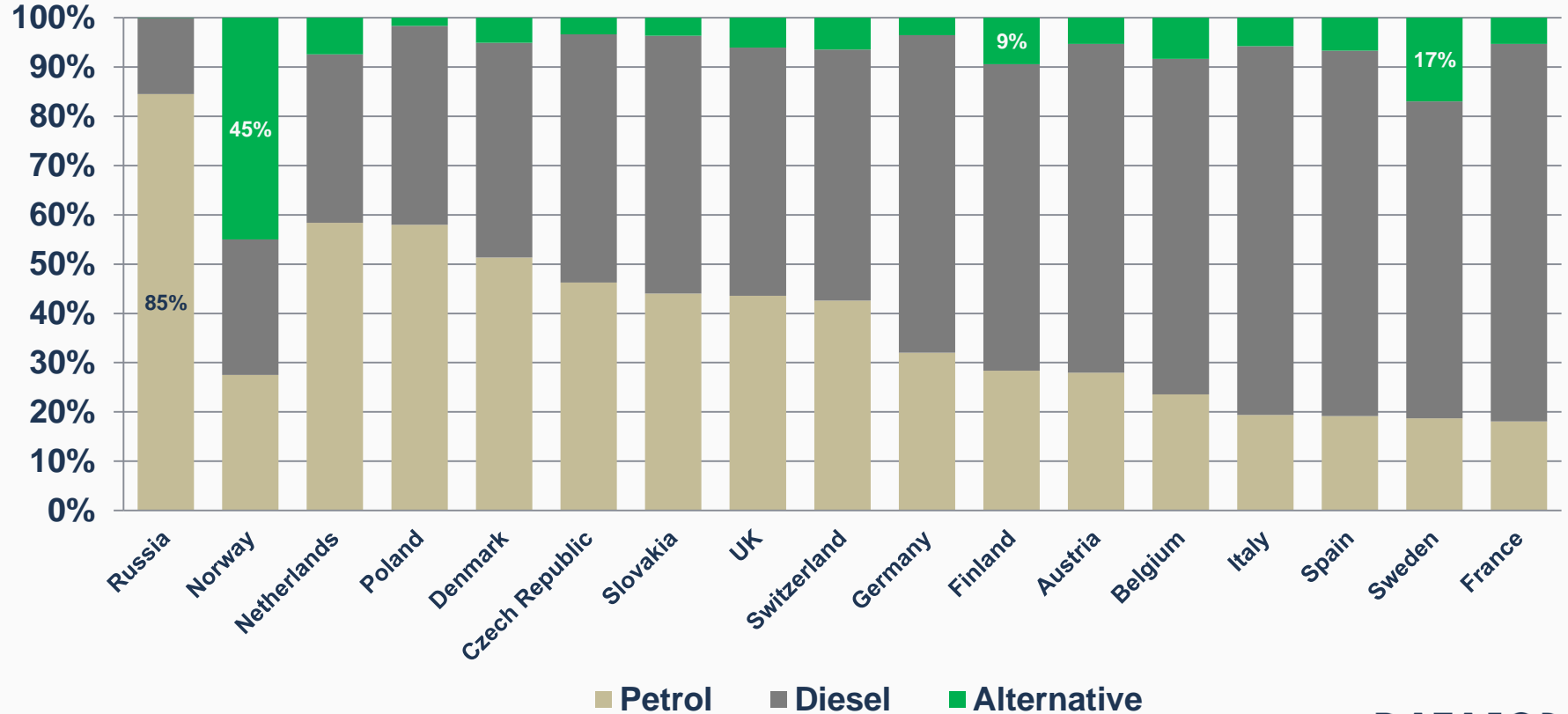
Growth of Alternative

Passenger Car Registrations – Alternative Fuel Types Jan-Dec 2016/2017



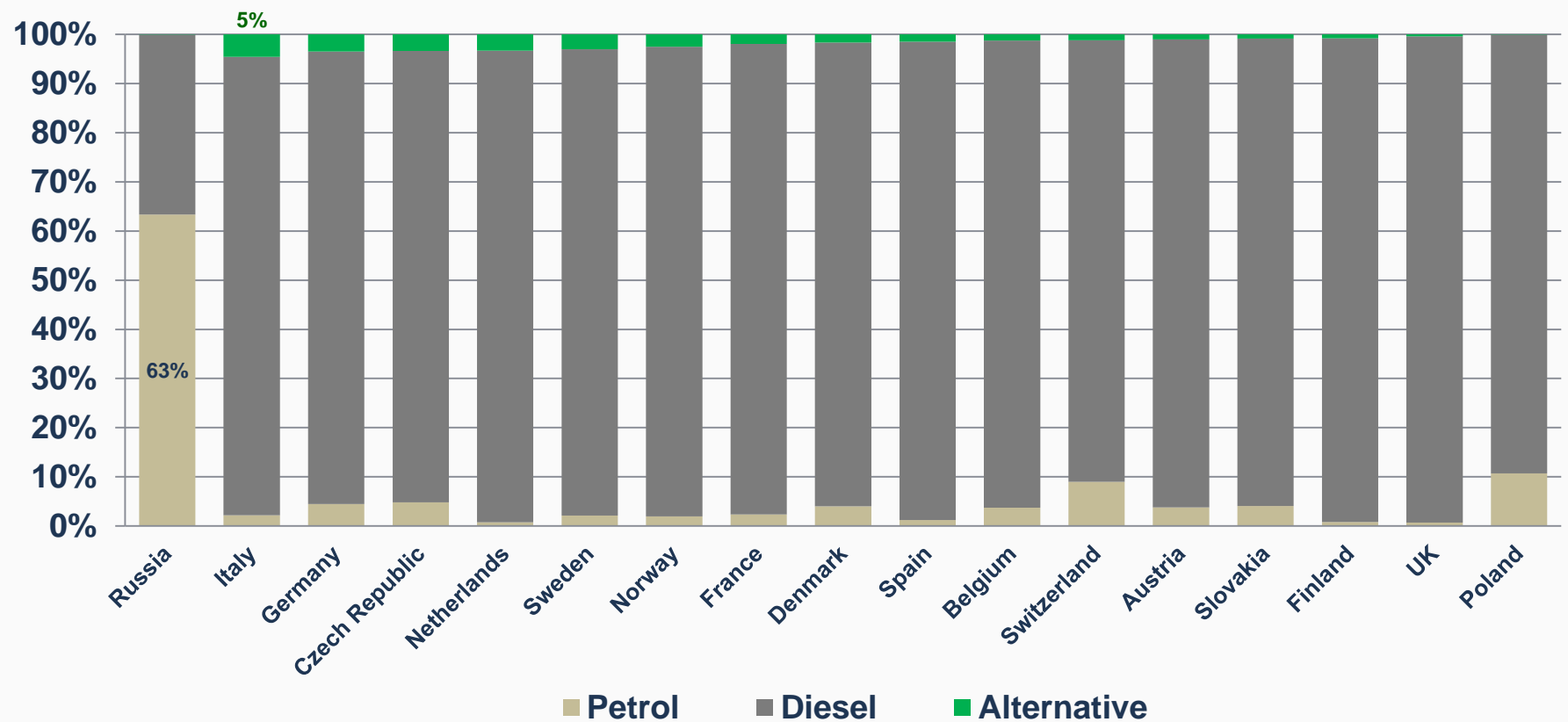
Europe is not homogenous

Passenger Car Registrations – Fuel Types in True Fleet Jan-Dec 2017



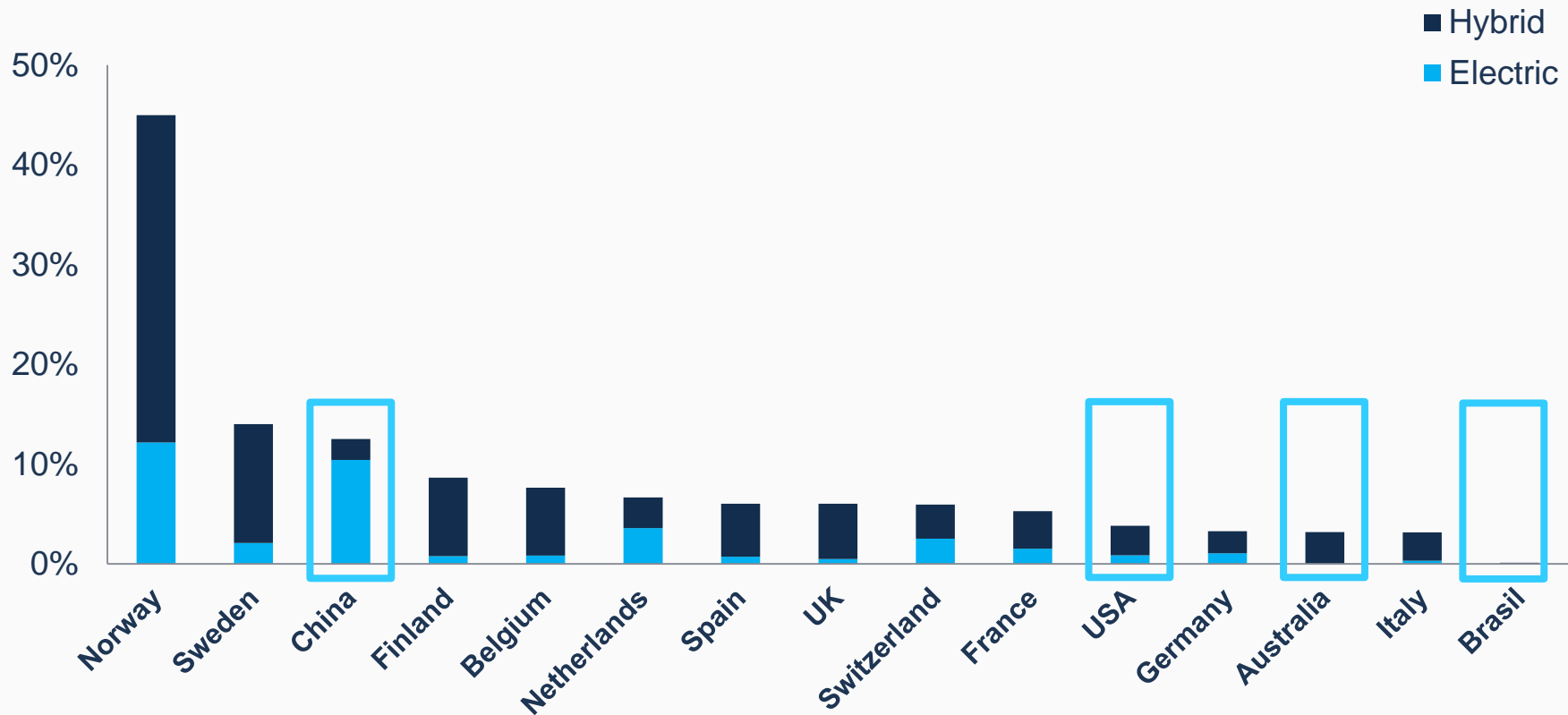
Europe is not homogenous

LCV Registrations – Fuel Types in True Fleet Jan-Dec 2017



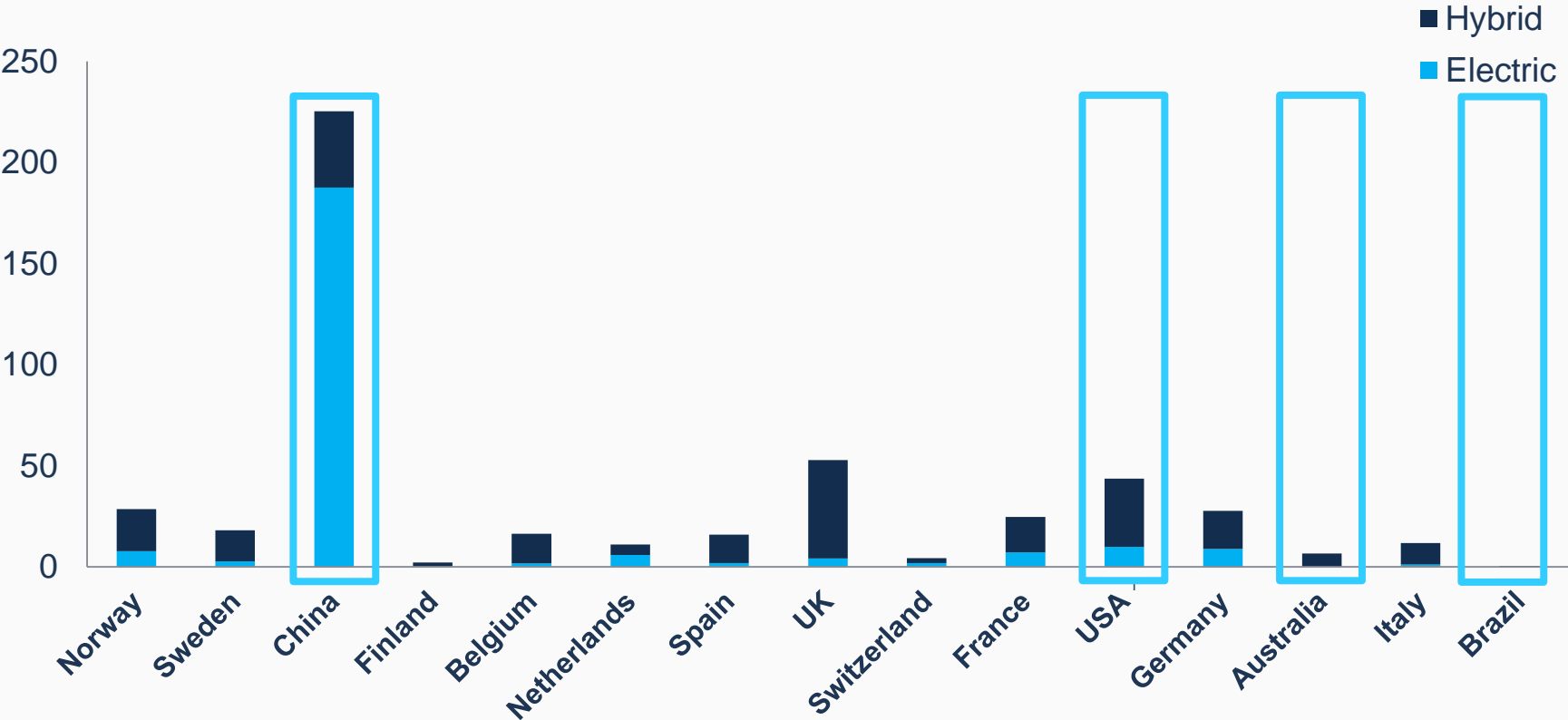
Share of Hybrid and Electric Vehicles around the fleet globe

True Fleet registrations in 2017



Hybrid and Electric Vehicles around the fleet globe

True Fleet registrations in 2017 (in thousand)



What range is sufficient for you to change to an electric vehicle ?

1) upto 200km



2) 201-300km



3) 301-400km



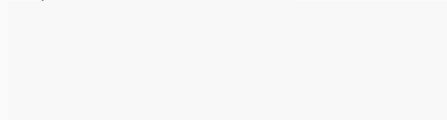
4) 401-500km



5) 501 +km



6) Not at all





what if...

diesel never existed

CO₂-Emissions for the German Passenger Car Market



CO₂-Emissions for the German Passenger Car Market

$$CO_2 = \sum_{O,M,F} (Mileage_{O,F})$$

$$CO_2 = \sum_{O,M,F} (Mileage_{O,F} * Volume_{O,M,F})$$

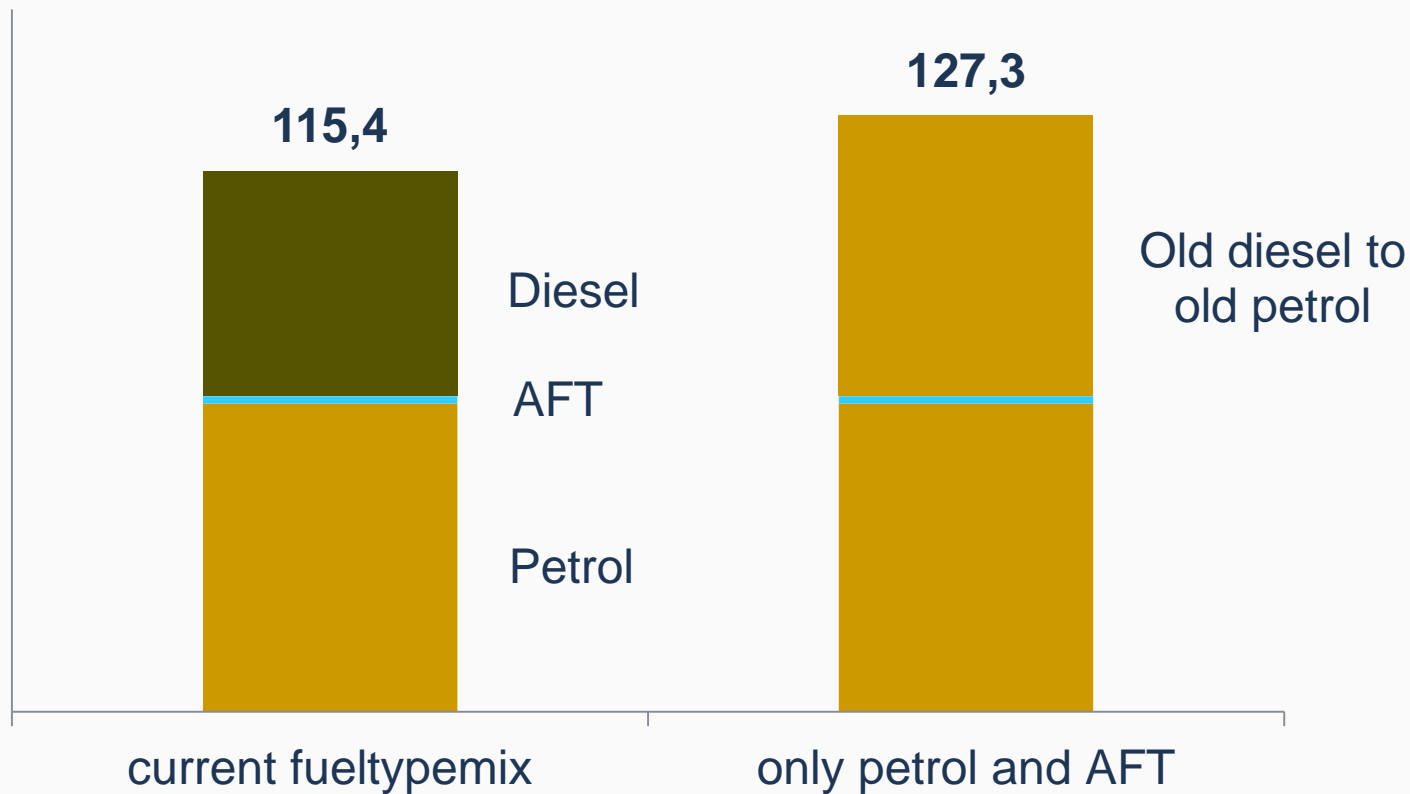
$$CO_2 = \sum_{O,M,F} (Mileage_{O,F} * Volume_{O,M,F} * \emptyset CO_2_{O,M,F})$$

$$CO_2 = \sum_{O,M,F} (Mileage_{O,F} * Volume_{O,M,F} * \emptyset CO_2_{O,M,F} * \emptyset Correctionvalue_F)$$

O=Ownertype M= Vehicle Segment/Model F= Fuelttype

If all diesel in parc were petrol

CO2 emissions from passenger cars in Germany (Million tons per year)





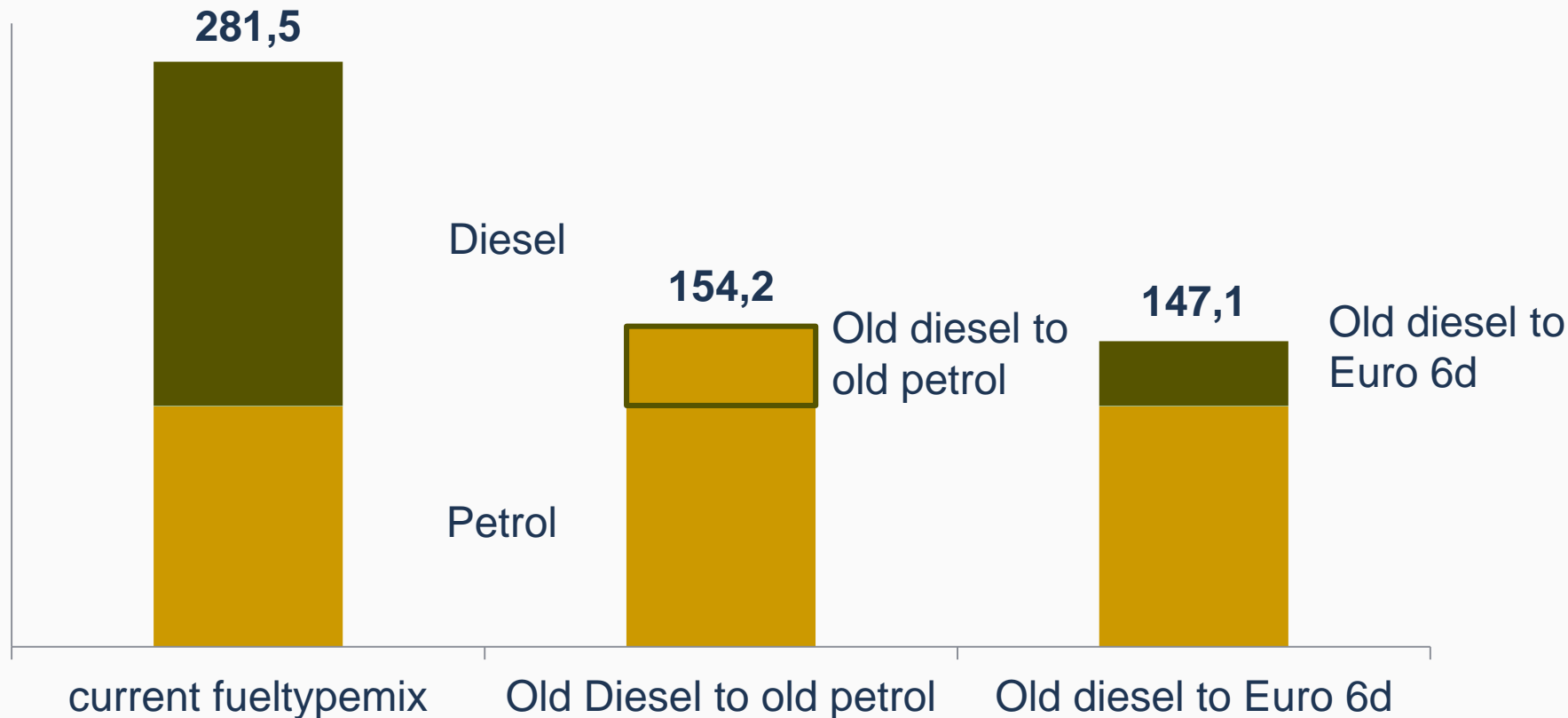
if diesel did cars would not exist
in Germany alone we would emit

+11.900.000 tons

more CO₂

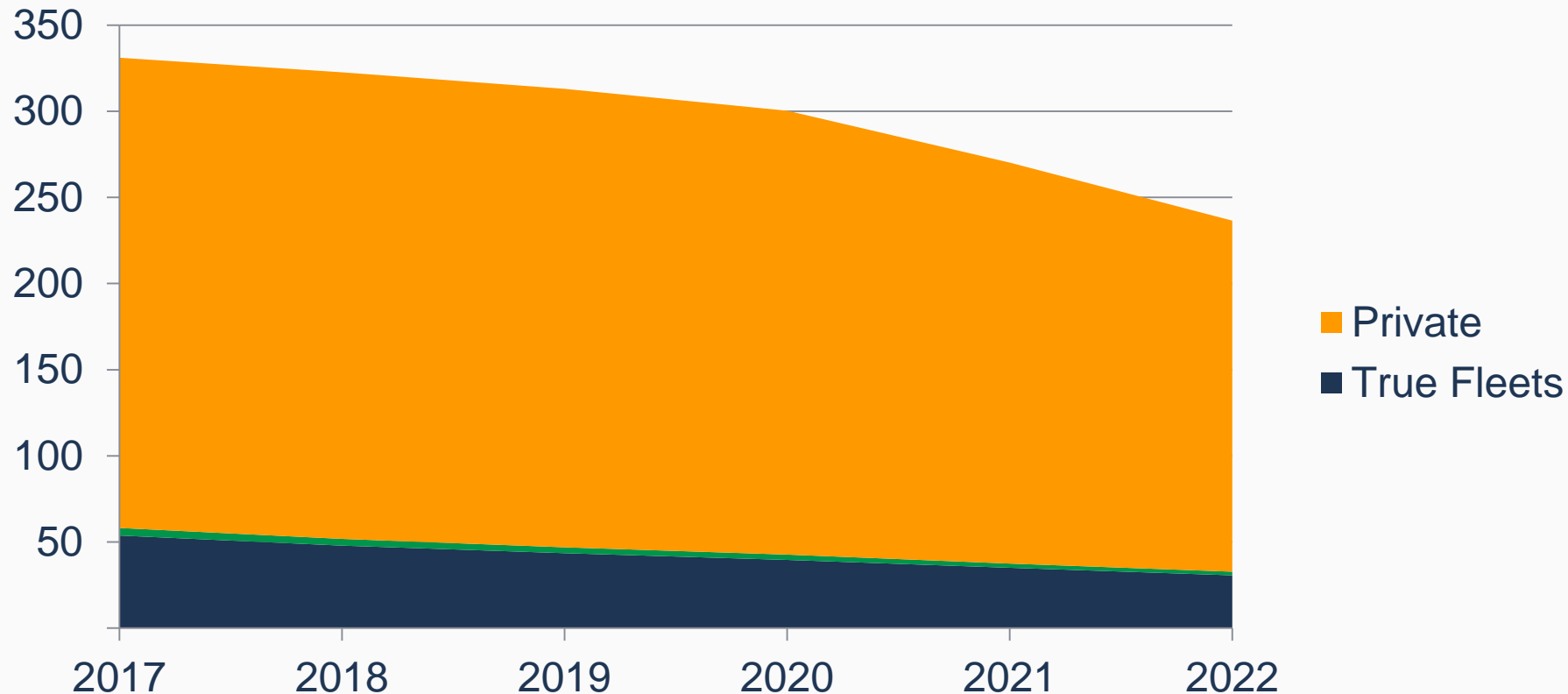
If all diesel in parc were petrol

NOx emissions from passenger cars in Germany (1000-tons per year)



What happens to NOx if we do nothing?

NOx emissions from passenger cars in Germany (1000tons per year)



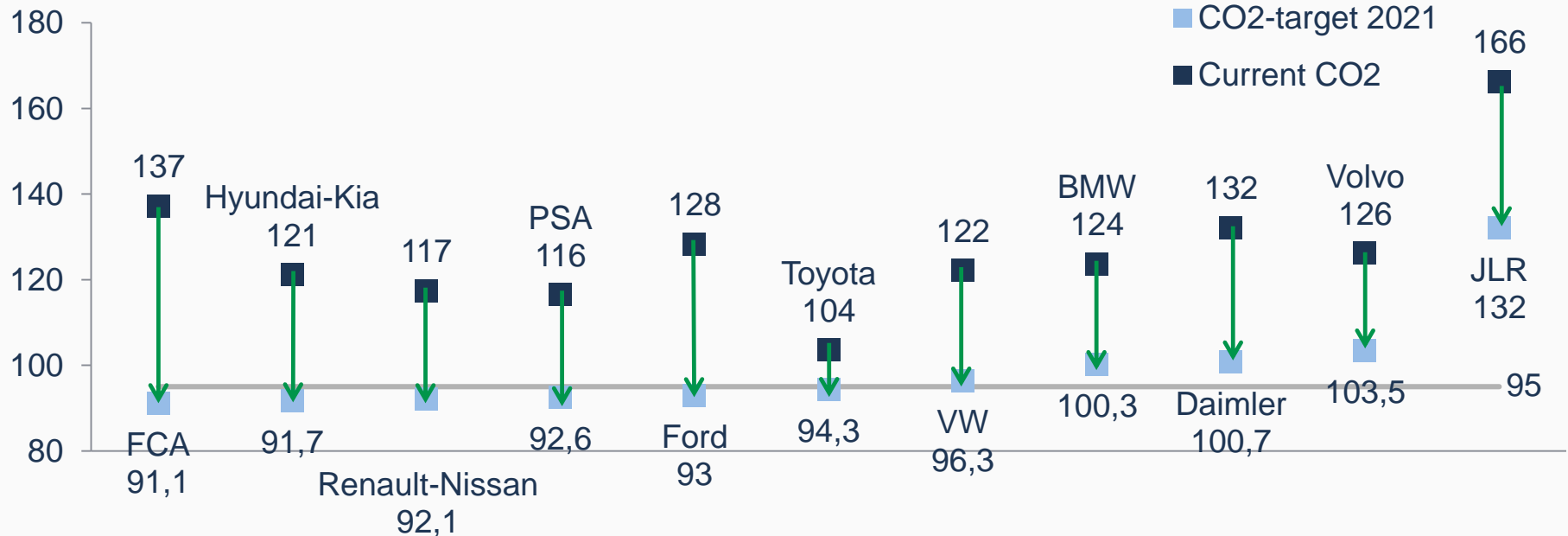


what if...

**...the CO₂ target of 95g 2021
will be met**

2021 CO2 targets and current values for Germany

- EU Average **95 g/km** NEDC
- Penalty: **95 Euro** per gram and registered car
- OEM target depending on average vehicle **weight**



Source: Own calculations, PA Consulting

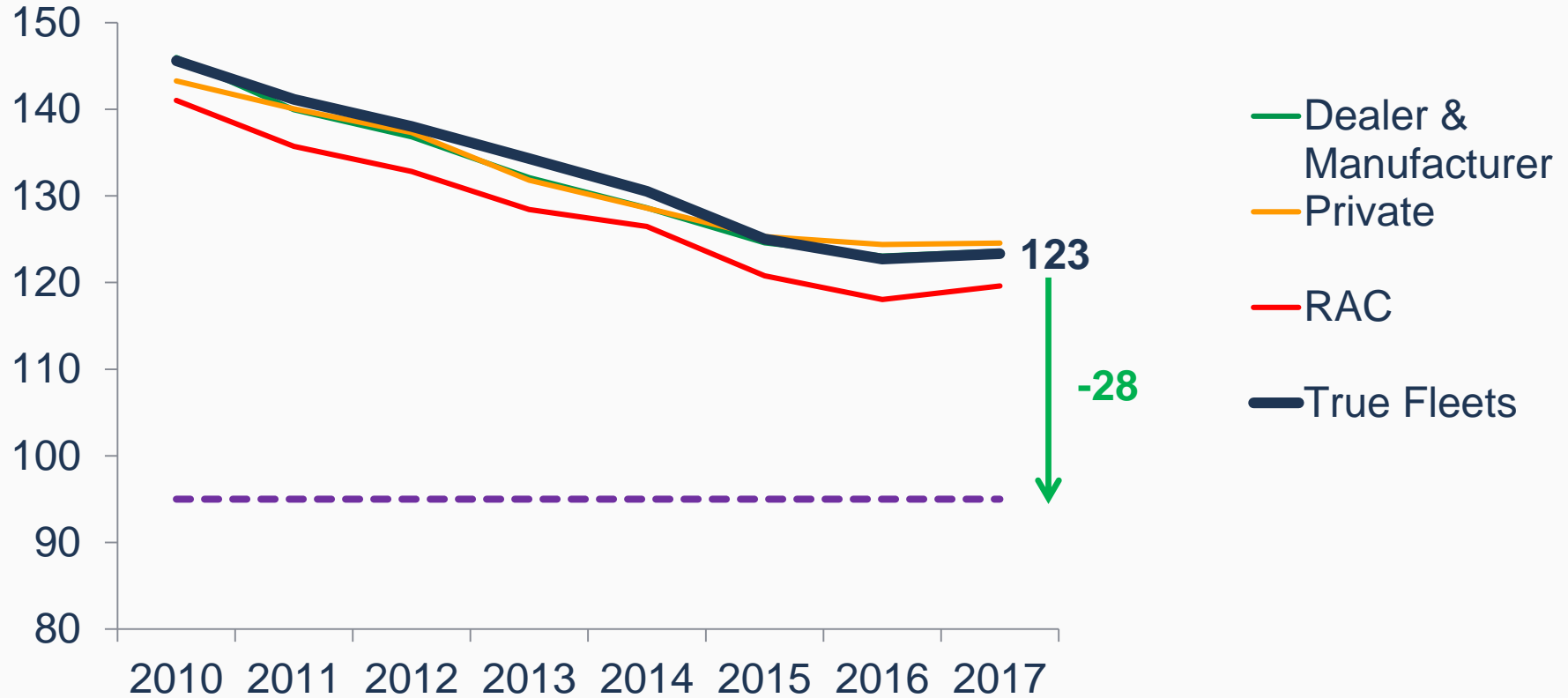
Germany

- About 70% diesel share in fleet
- Decent share of medium/executive cars/SUVs



Germany – Average CO2 by market segments

Long way to 95!



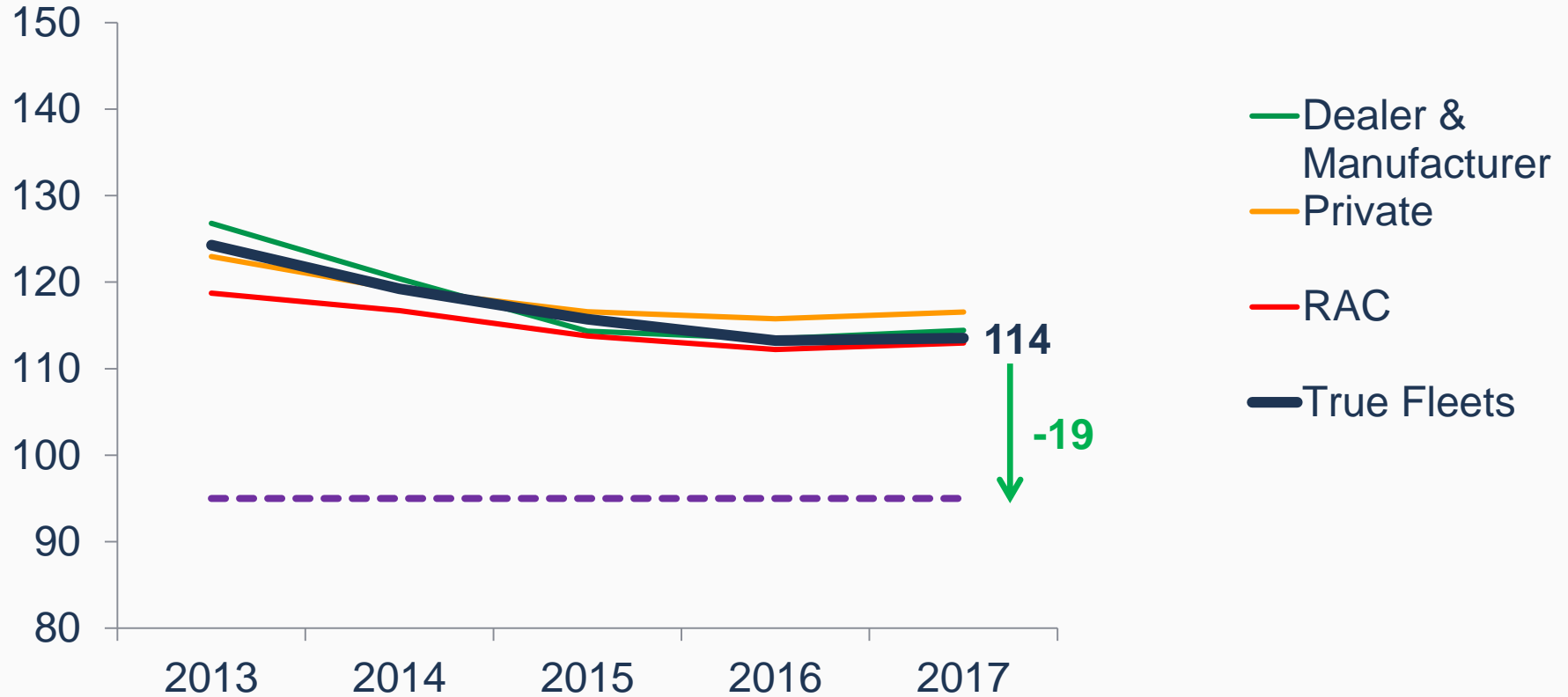
Spain

- Almost 80% diesel share in fleet
- Compact Vehicles (Cars, SUVs, Utilities) dominate the market



Spain – Average CO2 by market segments

Market Segments are close, no reduction in 2017



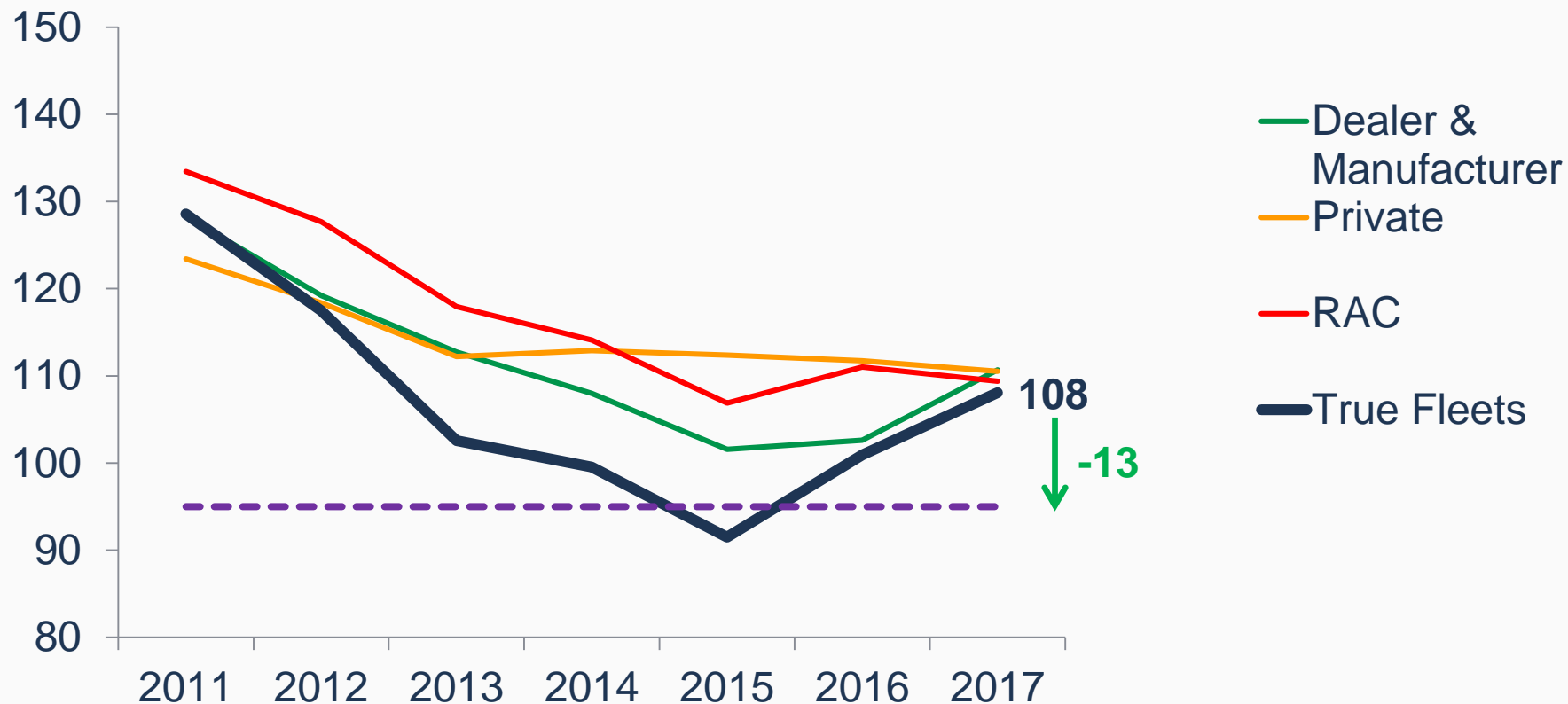
The Netherlands

- Painfull CO2 taxes
- Many Compact/Small/Middle Class Cars
- Few SUVs

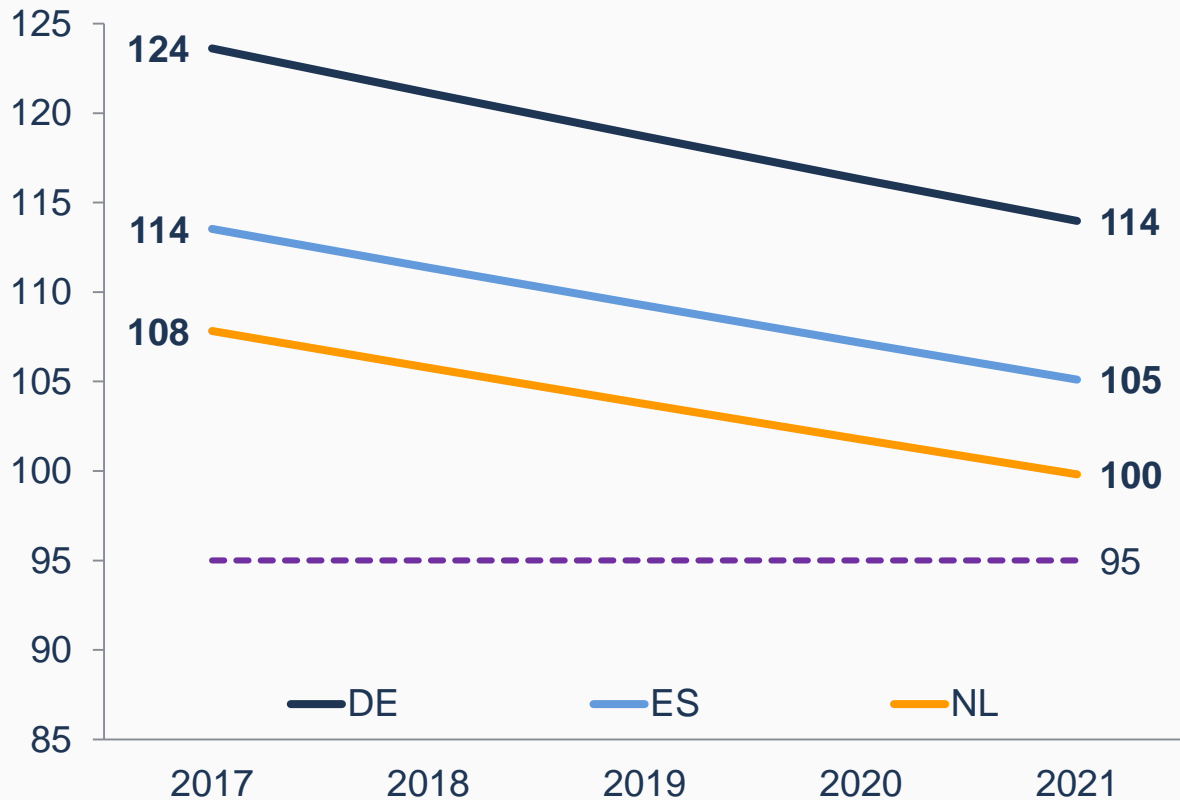


The Netherlands – Average CO2 by market segments

The True Fleet Market has the lowest CO2



CO2 reduction by efficiency gain

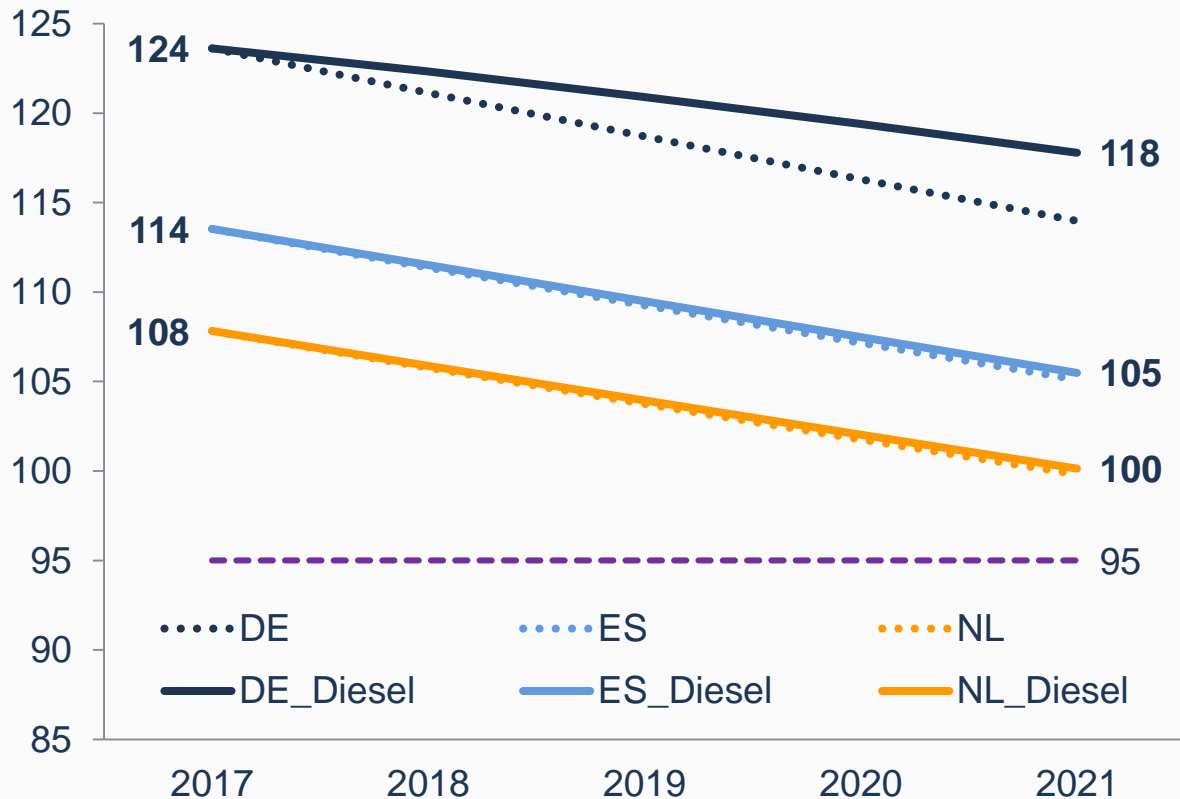


Hypothesis:

1. CO2 efficiency gains

-2% per year (PHEV -5%)

What happens on diesel decline?



Hypothesis:

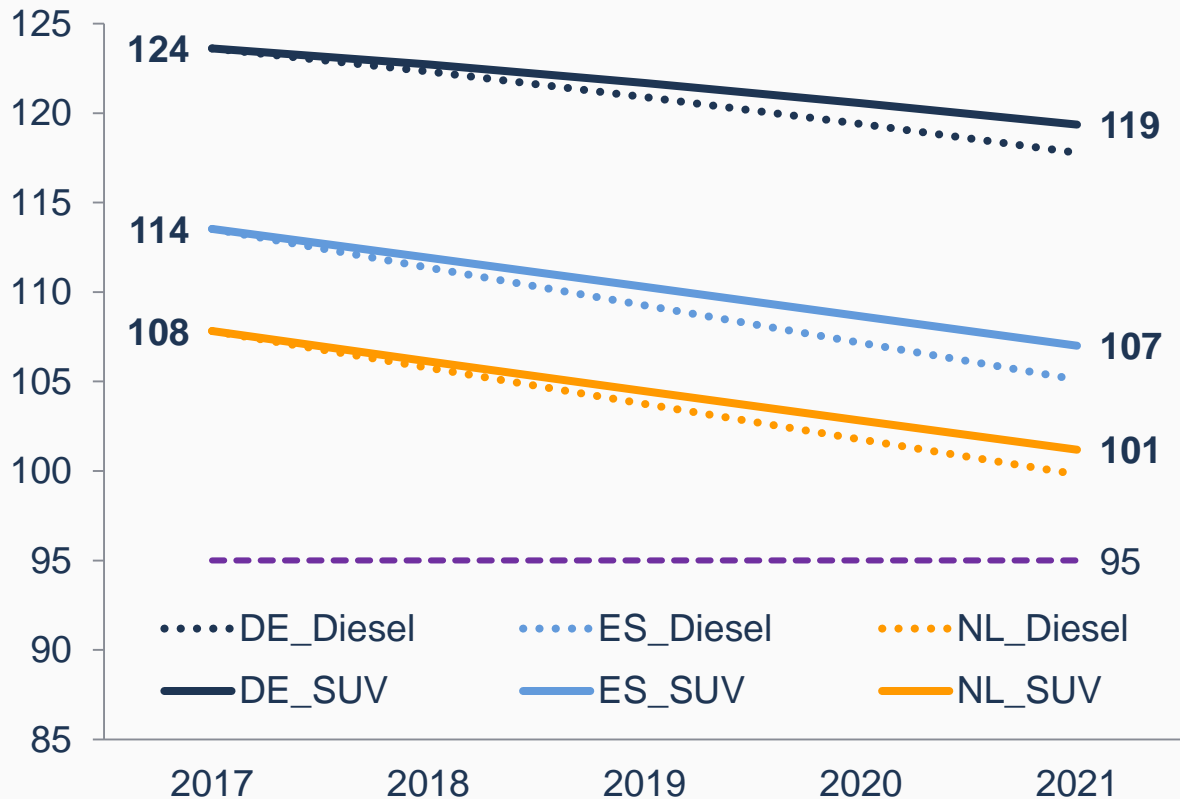
1. CO2 efficiency gains

-2% per year (PHEV -5%)

2.1. & Decline in diesel is redistributed

proportionally to other fuel types (-10%)

What happens on SUV rise?



Hypothesis:

1. CO2 efficiency gains

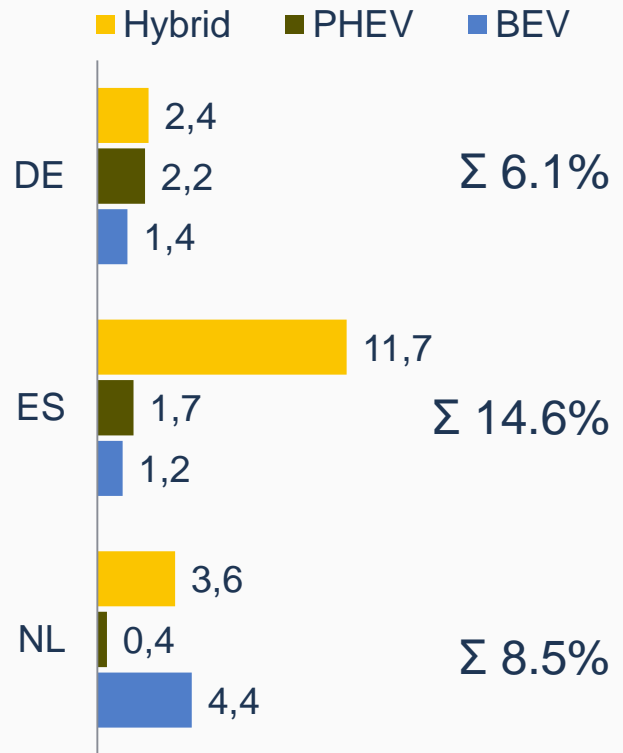
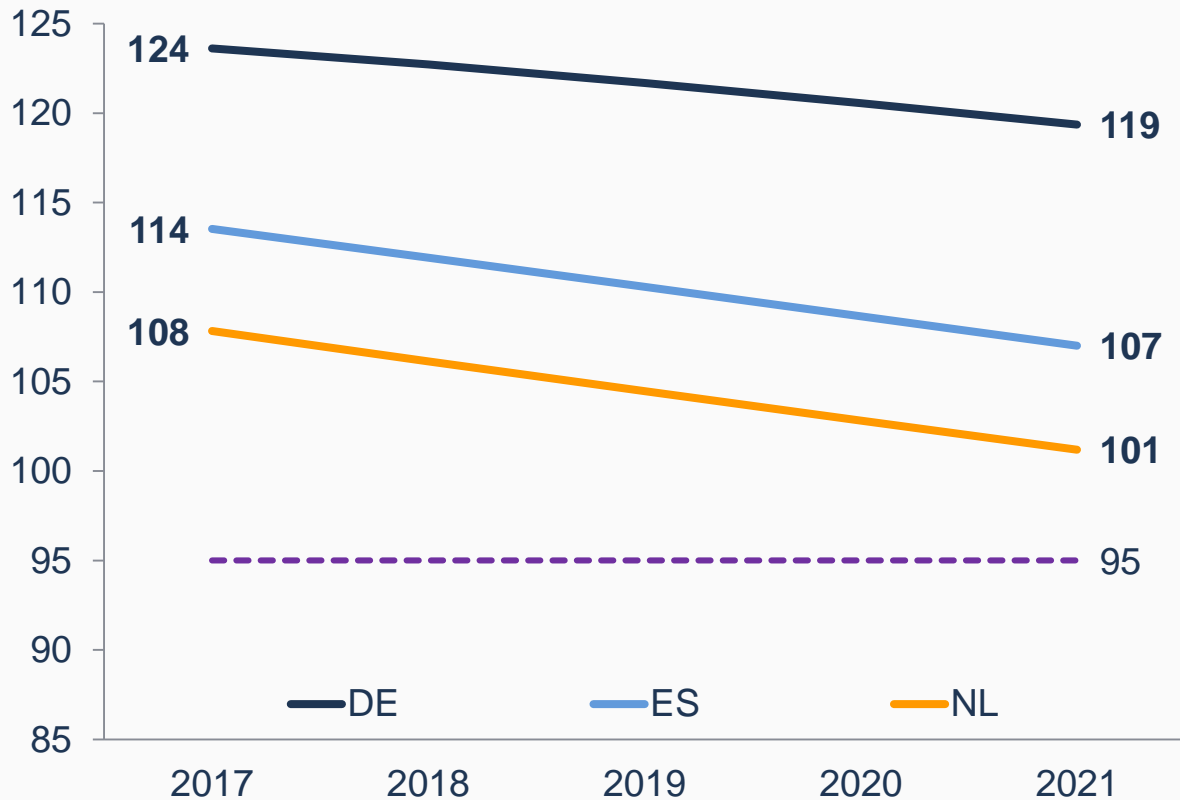
-2% per year (PHEV -5%)

2.1. & Decline in diesel is redistributed

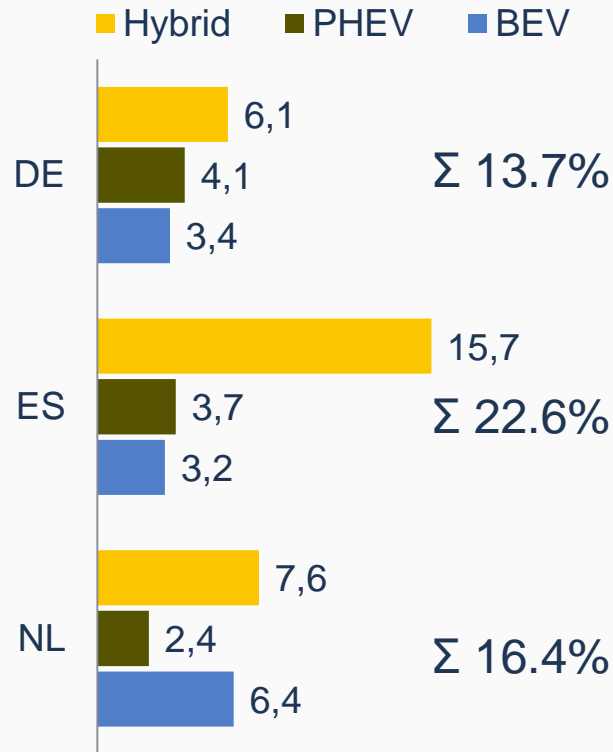
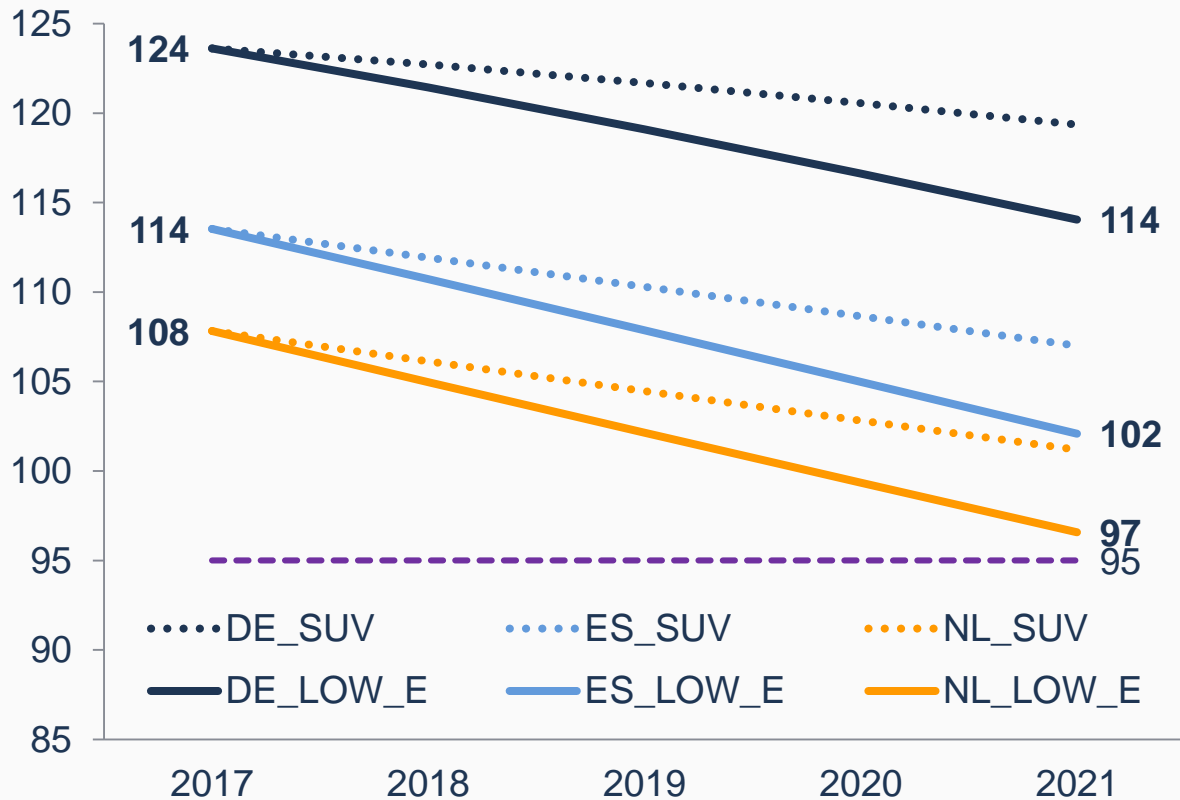
proportionally to other fuel types (-10%)

3.1. & 2. & SUV continue to grow by 7% every year

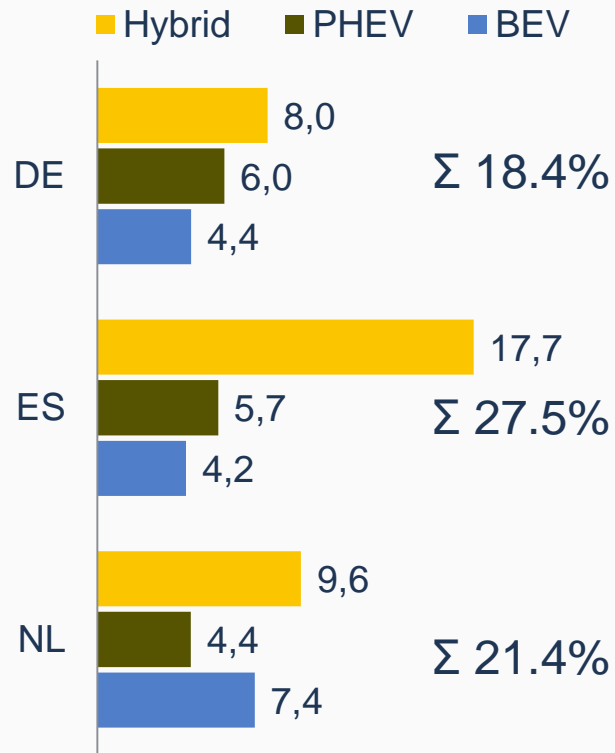
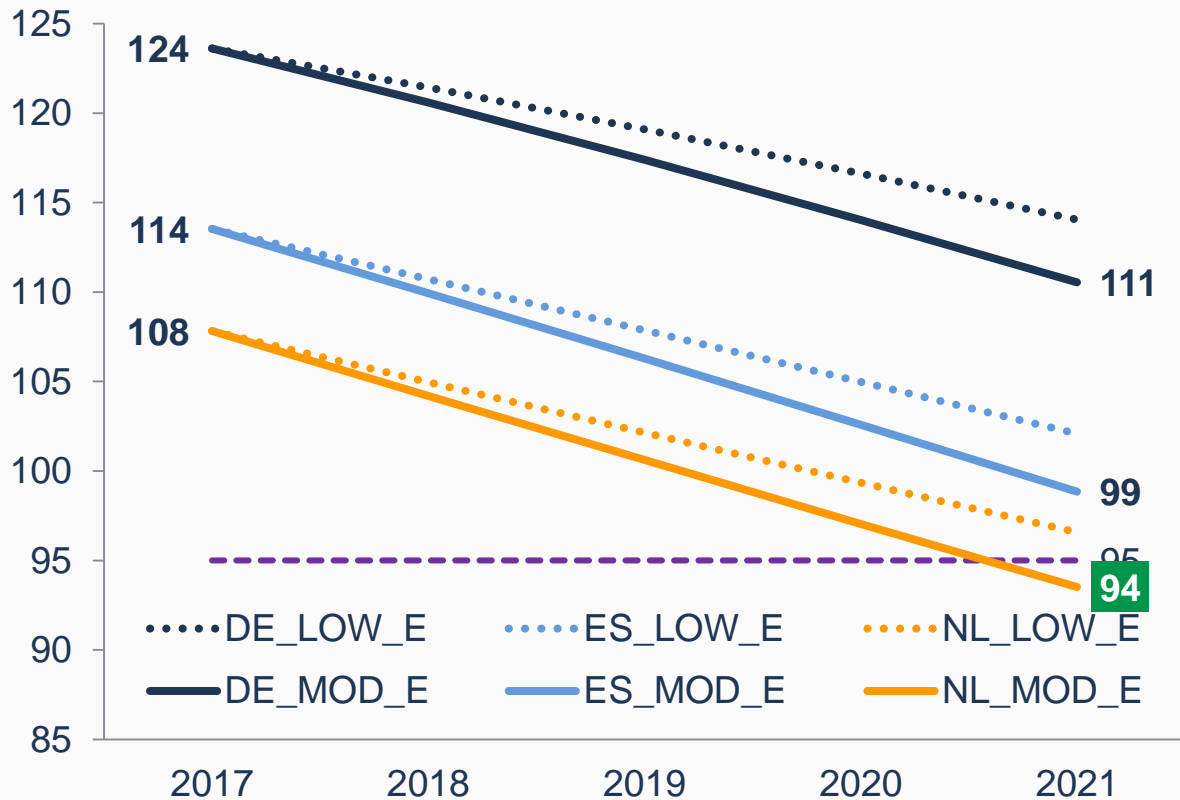
– Diesel, + SUV with 2021 fuel type shares



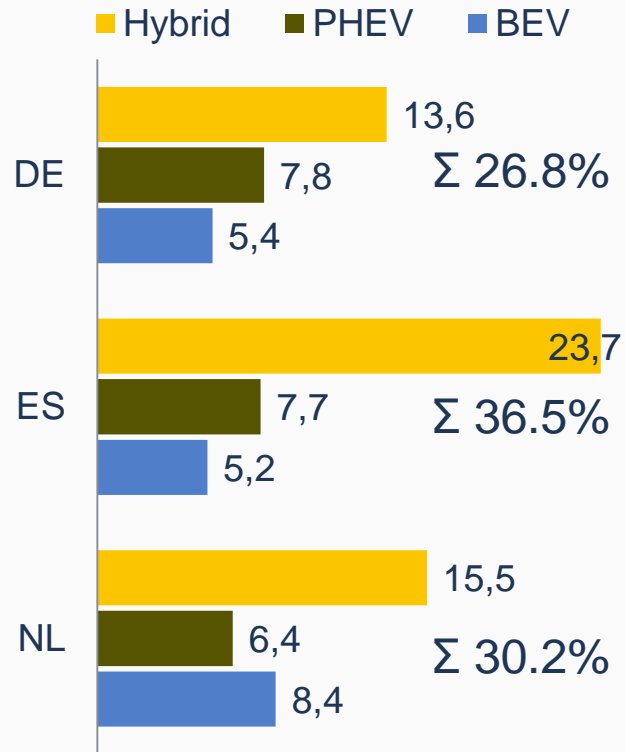
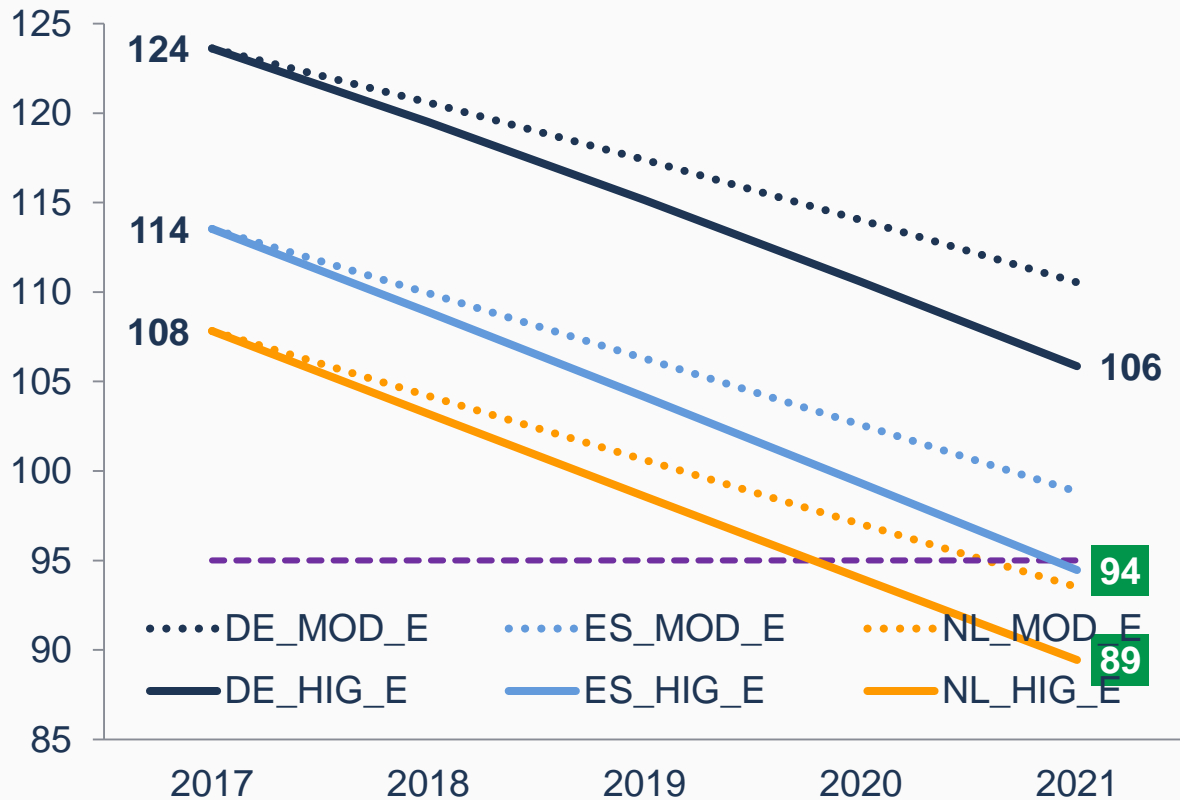
~17% Electrification



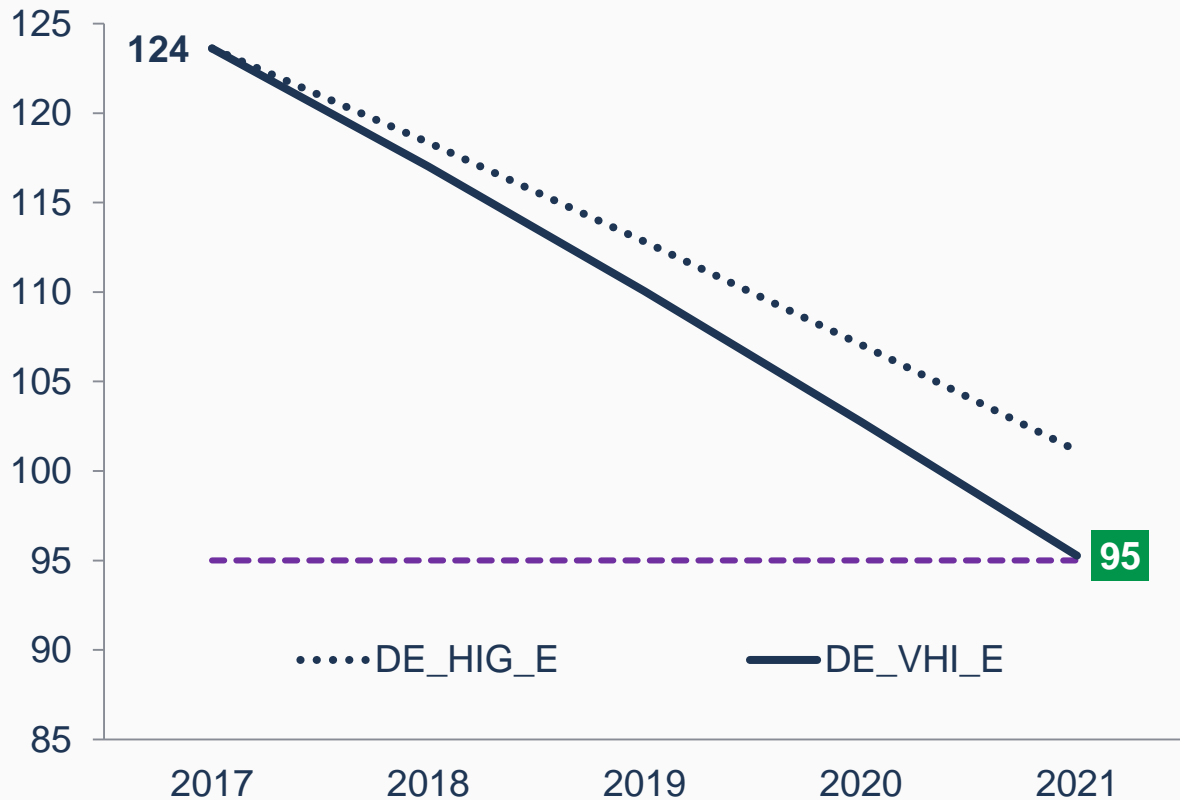
~22% Electrification



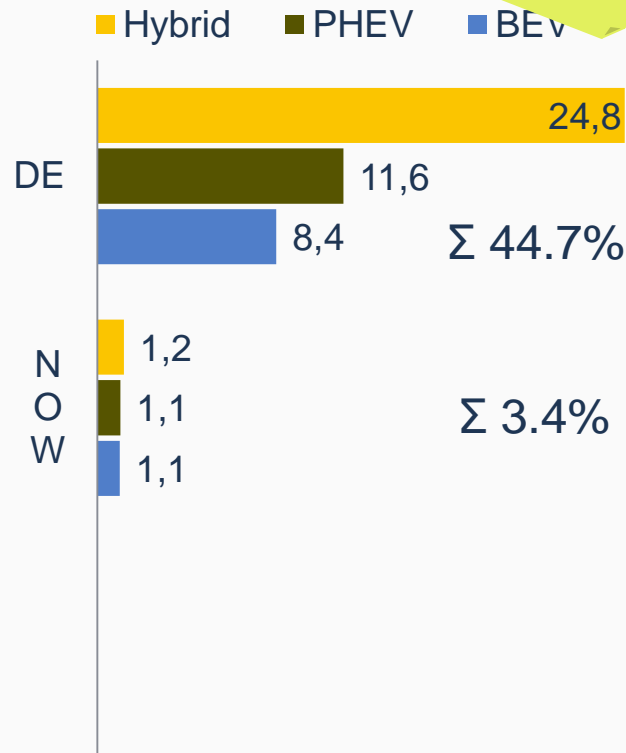
~31% Electrification



~45% Electrification



Just 3 years left





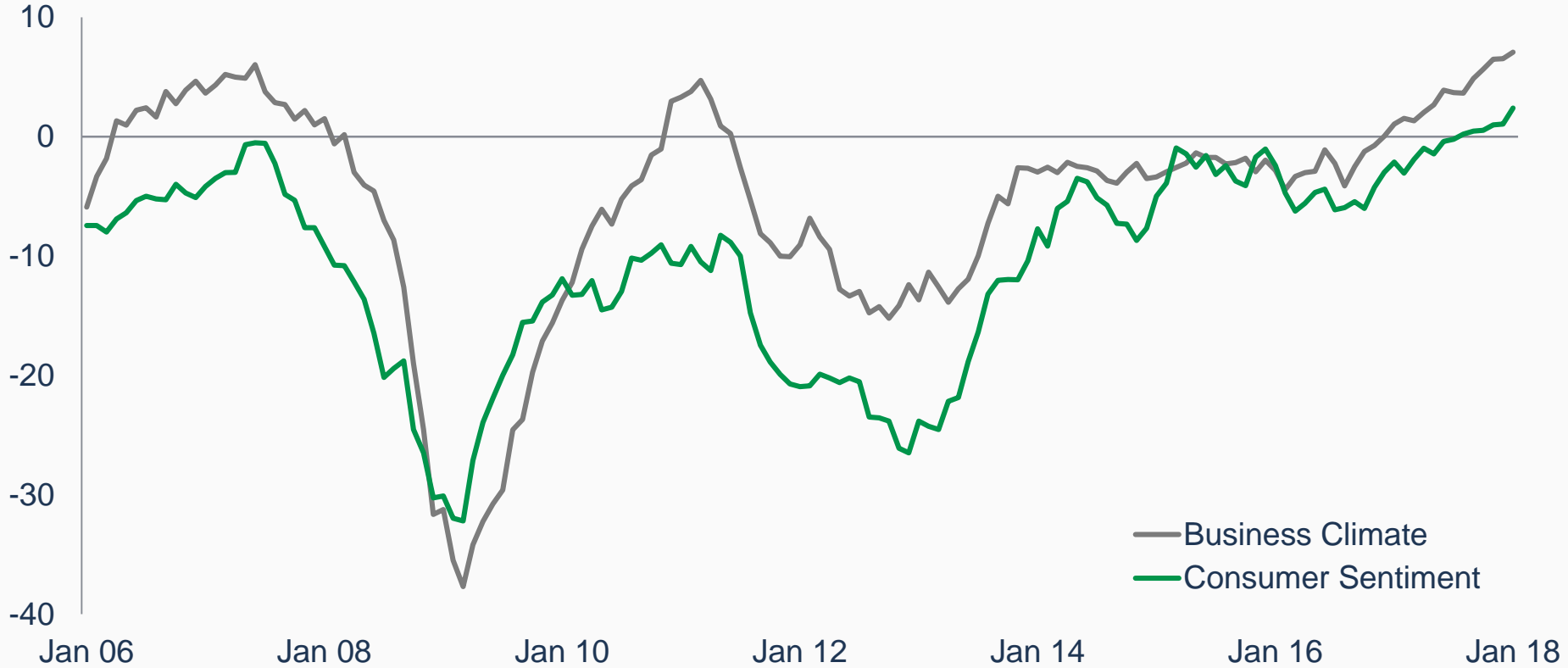
in order to reach the 95g we need to be electrified



Outlook

will the marketshare of fleet rise to 100%

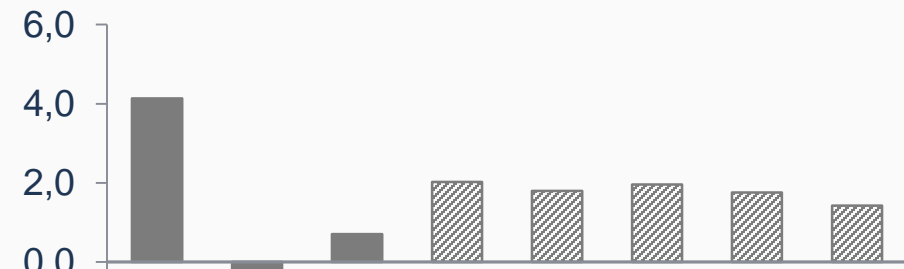
Good sentiment of consumers and companies in EU-7 countries



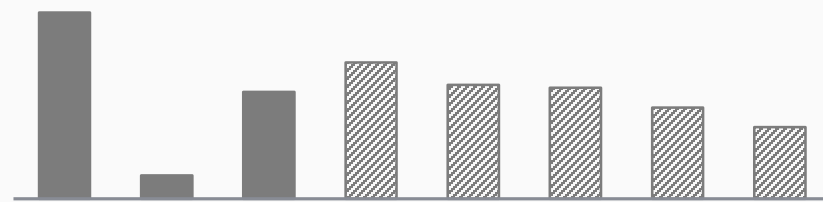
The economic development supports current dynamics

Growth in %

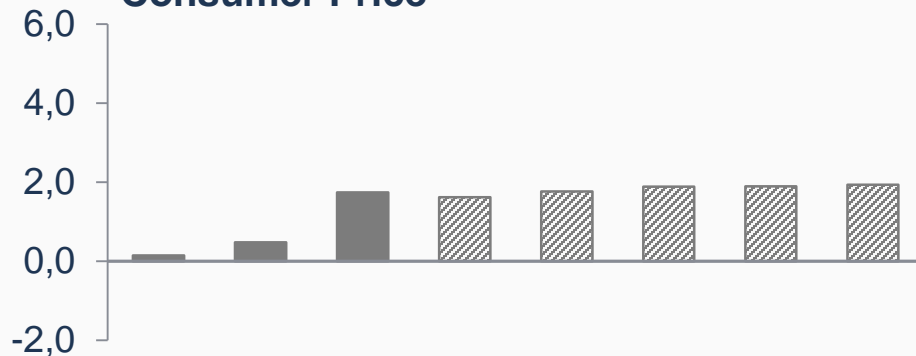
GDP



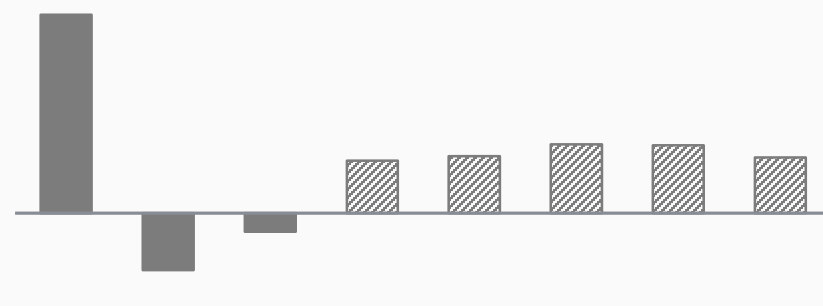
Fixed Investments



Consumer Price



Personal Disposable Income

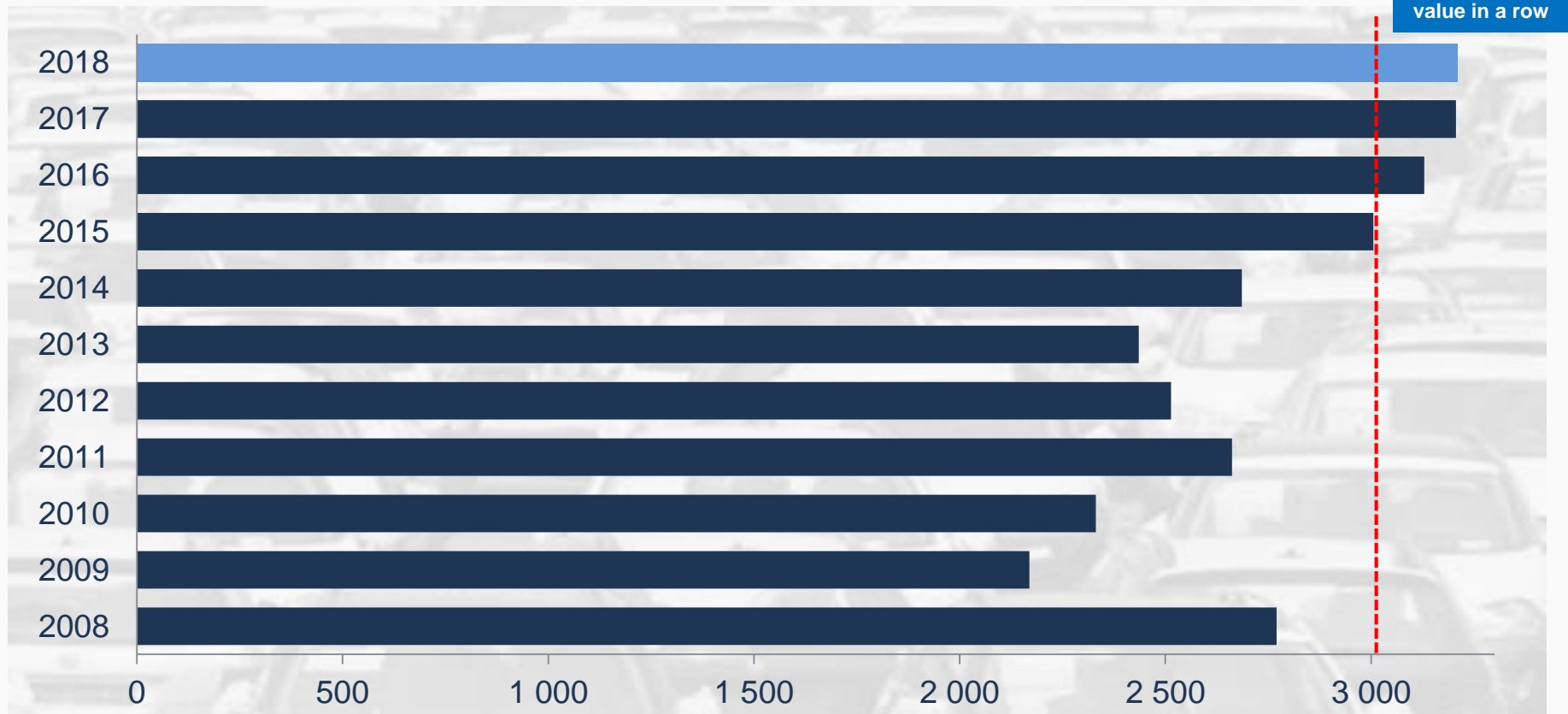


2015 2016 2017 2018 2019 2020 2021 2022

2015 2016 2017 2018 2019 2020 2021 2022

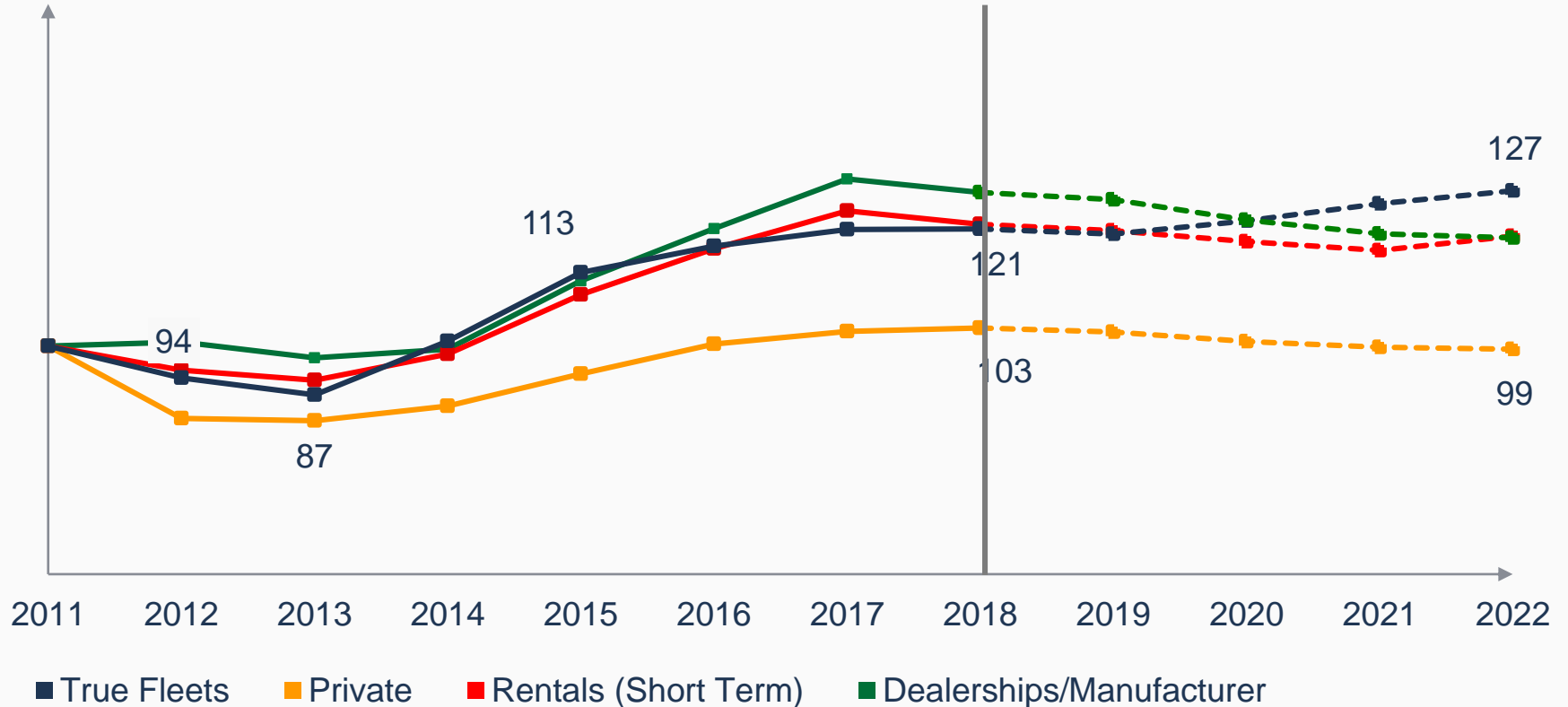
What we expect for 2018

Passenger Car fleet registrations in EU-7 in thousand

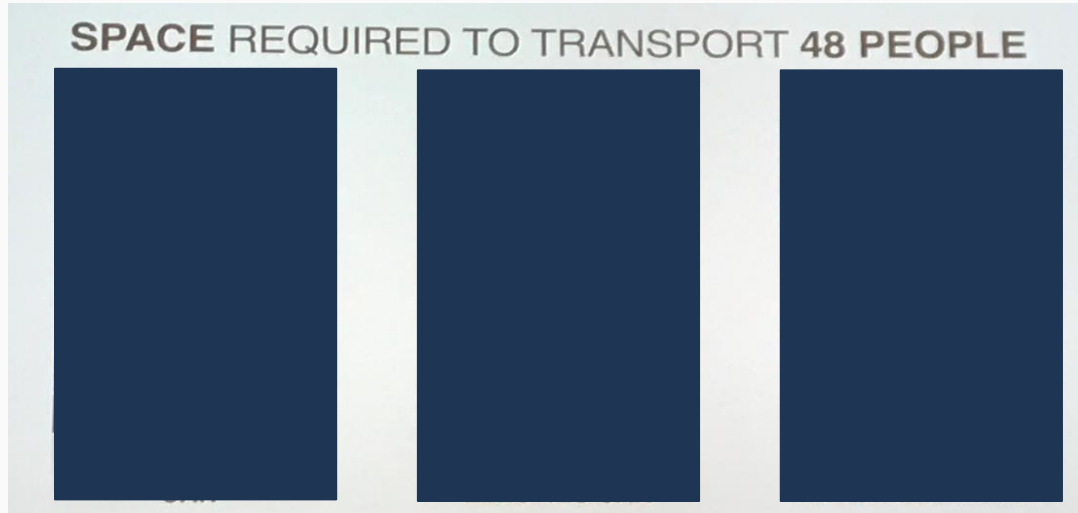


Relevance of True Fleets keeps growing

Development of market segments in EU-7 (2011 = 100)



to ensure mobility in the future the powertrain is not the only aspect we have to take into consideration



DATAFORCE

Wir zählen Autos.

Thank You

Fleetmarket Trends 2018

International Fleet Meeting Geneva

07.03.2018 Marc A. Odinius – Managing Director - Dataforce GmbH

+491635938000 – marc.odinius@dataforce.de