



The EU's automotive industry transition towards green and clean vehicles

2 November 2021

Transforming EU economy and society to meet climate ambitions

- On 14 July 2021, the European Commission adopted a set of proposals to make the EU's climate, energy, land use, transport and taxation policies fit for **reducing net greenhouse gas emissions by at least 55% by 2030**
- Union-wide **climate-neutrality objective 2050**



Transforming the transport sector to meet climate ambitions

- Transport has a crucial role to play - responsible for nearly **30%** of the EU's total CO₂ emissions
- Road transport is the biggest emitter
- **90% reduction of greenhouse gas emissions in transport by 2050**

Share of total EU Greenhouse Gas (GHG) emissions, per mode



EU vehicles market: overview

- 11.7 million – EU represents a market of 11.7 million motor vehicles per year (2009-2020)
- 243 million – passenger cars on the road in the EU today
- 47.5% – Almost half of new passenger cars sold are powered by petrol
- 24.5% – Alternatively-powered vehicles (battery electric, plug-in hybrid, hybrid and alternative fuels) together represent 24.5% of new car sales in the EU
 - 10.5%: share of electrically-chargeable vehicles (5.4% battery electric, 5.1% plug-in hybrids)

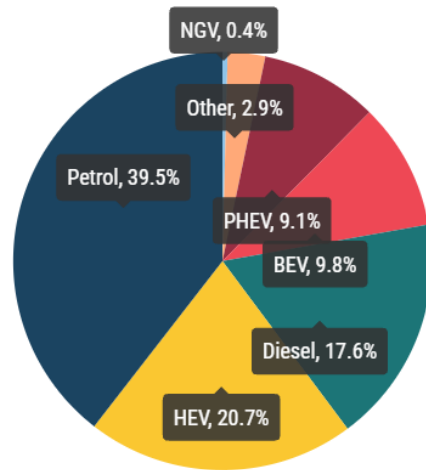
Q3 2021

New passenger cars by fuel type in the EU

% SHARE

Q3 2021

Petrol Diesel Battery electric (BEV) Plug-in hybrid (PHEV) Hybrid electric (HEV)
Natural gas (NGV) Other

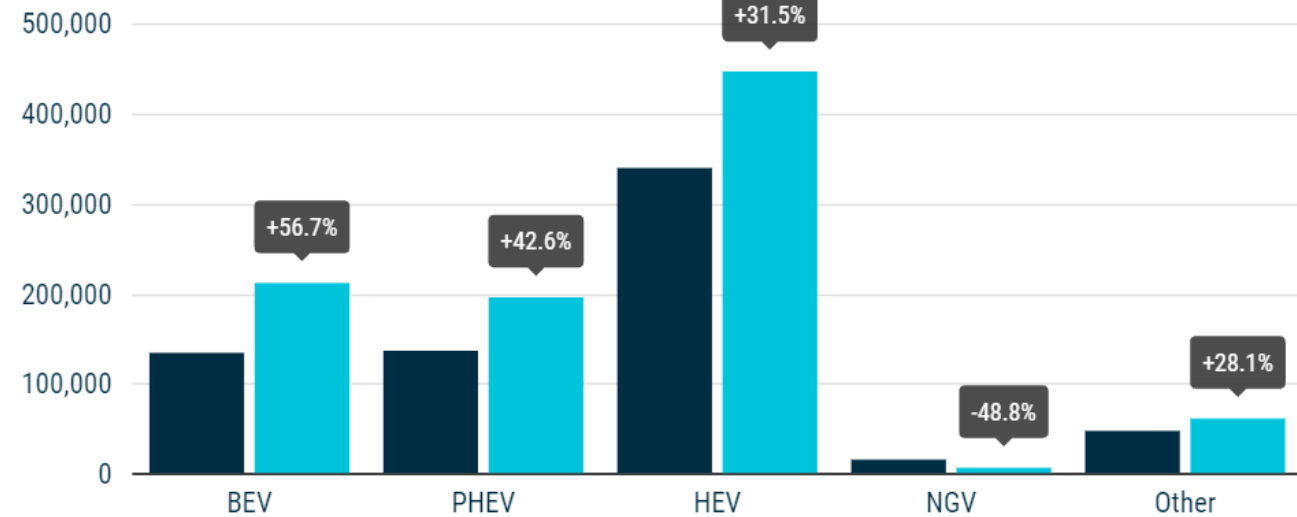


Q3 2020: BEV=4.9%; PHEV=5%

New passenger car registrations in the EU by alternative fuel type

EUROPEAN UNION

Q3 2020 Q3 2021



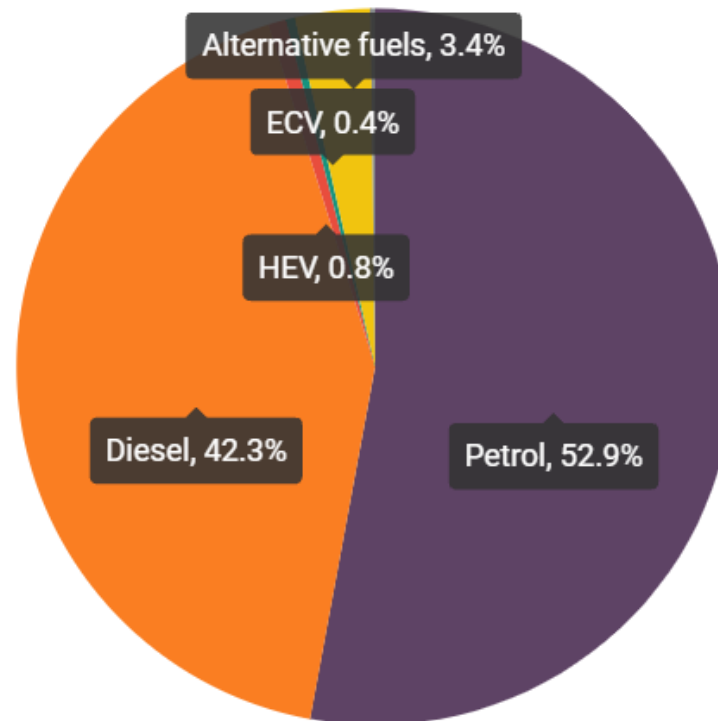
EU Fleet

Passenger cars in use, by fuel type

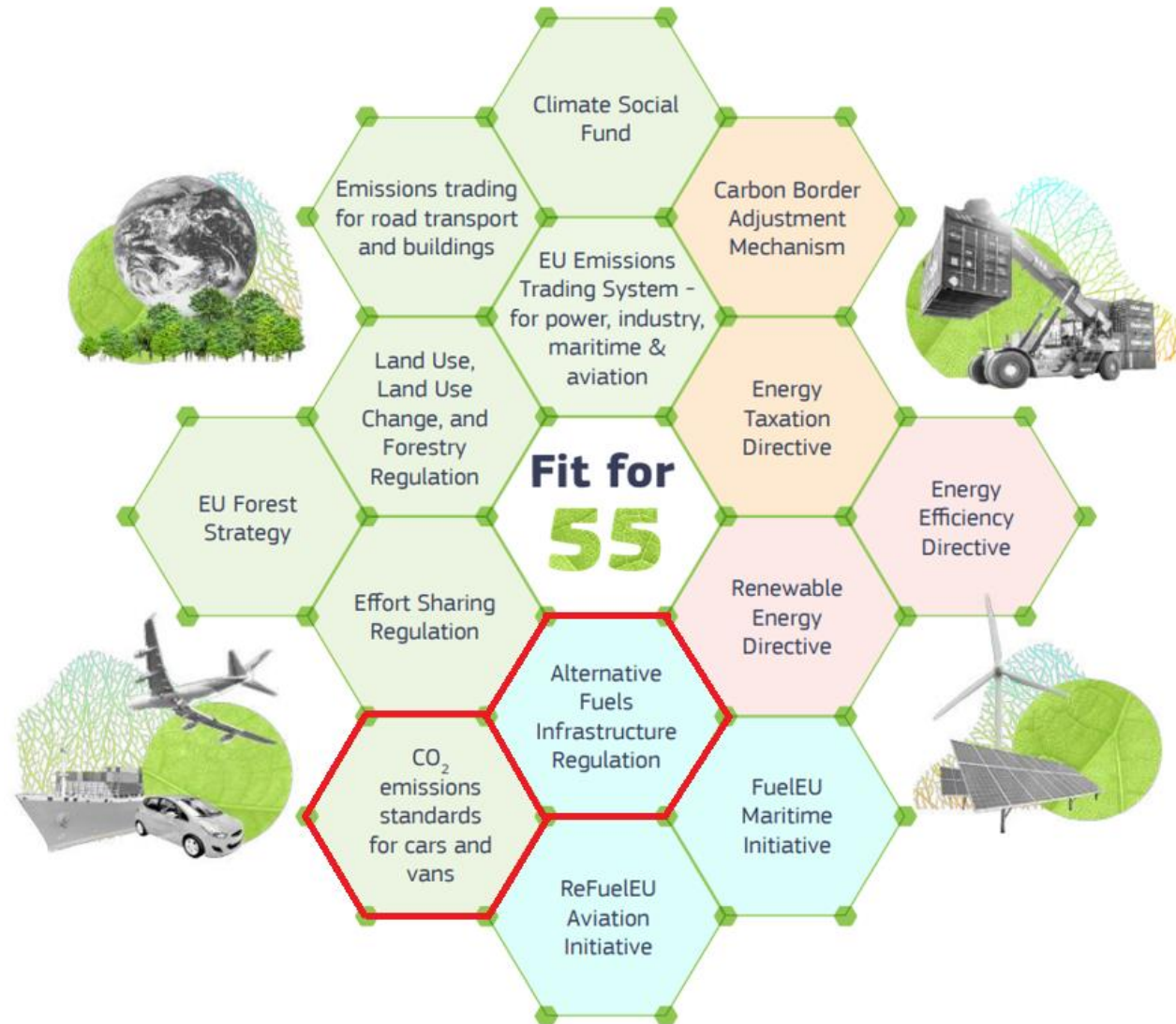
BY COUNTRY, %SHARE | 2019

EUROPEAN UNION ▾

■ Petrol ■ Diesel ■ Hybrid electric (HEV) ■ Electrically chargeable (ECV)
■ Alternative fuels ■ Unknown



Fit for 55: A comprehensive and interconnected set of proposals



Making road transport sustainable for all

The European Commission proposes **more ambitious targets for reducing the CO₂ emissions** of new cars and vans

55%

reduction of emissions from cars by 2030

50%

reduction of emissions from vans by 2030

0

emissions from new cars by 2035



From 2035 onwards, all new cars and vans registered in the EU will need to be zero-emission.

Benefits of strengthened CO2 targets

- **Reduction of CO2 emissions** in the road transport sector
- **Benefits for citizens** through lower energy expenditure and better air quality, especially in urban areas
- Economy-wide **GDP** and **employment** positive impacts
- Reduced **oil imports**
- Clear and long-term signal to stimulate **innovation in zero-emission technologies**, increase employment in new technologies

Alternative Fuels Infrastructure Regulation

Designed to:

- support the CO² emissions proposal
- ensure that drivers are able to charge or fuel their vehicles at a reliable network across Europe
- ensure that the lack of infrastructure does not act as a bottleneck to automotive manufacturers' investment plans for low- & zero-emission mobility

Fleet-based and distance-based targets

National fleet based targets for charging stations for cars and vans – those could lead to approximately*:

2025

1 million



2030

3.5 million



2040

11.4 million



2050

16.3 million



*according to Commission Impact Assessment of vehicle uptake following the 'Fit for 55' proposals and assuming an average power output of approx. 15 kW per recharging station



Recharging pools for cars and vans

- on the TEN-T core network: at least 300 kW power output every 60 km by 2025 and at least 600 kW by 2030;
- on the TEN-T comprehensive network: at least 300 kW power output every 60 km by 2030 and at least 600 kW by 2035.



Hydrogen refuelling stations

- will be made available every 150 km by 2030 along the TEN-T core network;
- in every urban node serving both light duty and heavy duty vehicles by 2030.



Recharging points for heavy duty vehicles

- on the TEN-T core network: at least 1400 kW of recharging points every 60 km by 2025 and at least 3500 kW by 2030;
- on the TEN-T comprehensive network: at least 1400 kW power output every 100 km by 2030 and at least 3500 kW by 2035;
- in every urban node and at every safe and secure parking by 2030.

Thank you