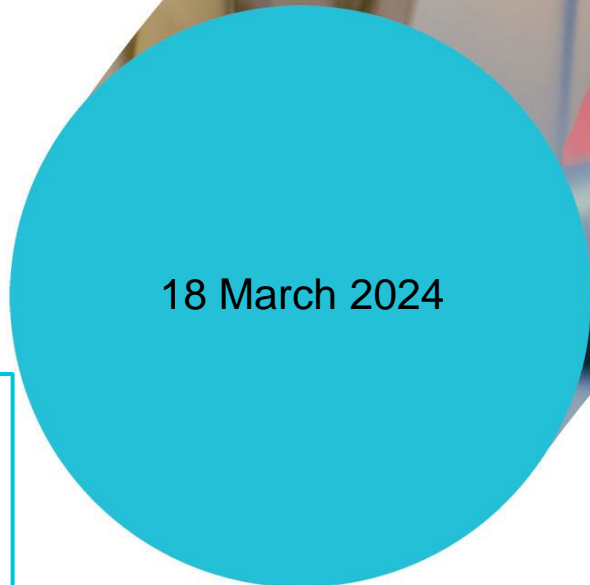


ROAD TRANSPORT – FUTURE OUTLOOK TO ZERO EMISSIONS MOBILITY



18 March 2024

acea

BMW
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DAIMLER
TRUCK



HONDA
The Power of Dreams

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Renault
Group

TOYOTA

VOLKSWAGEN GROUP

VOLVO

CLIMATE NEUTRALITY BY 2050



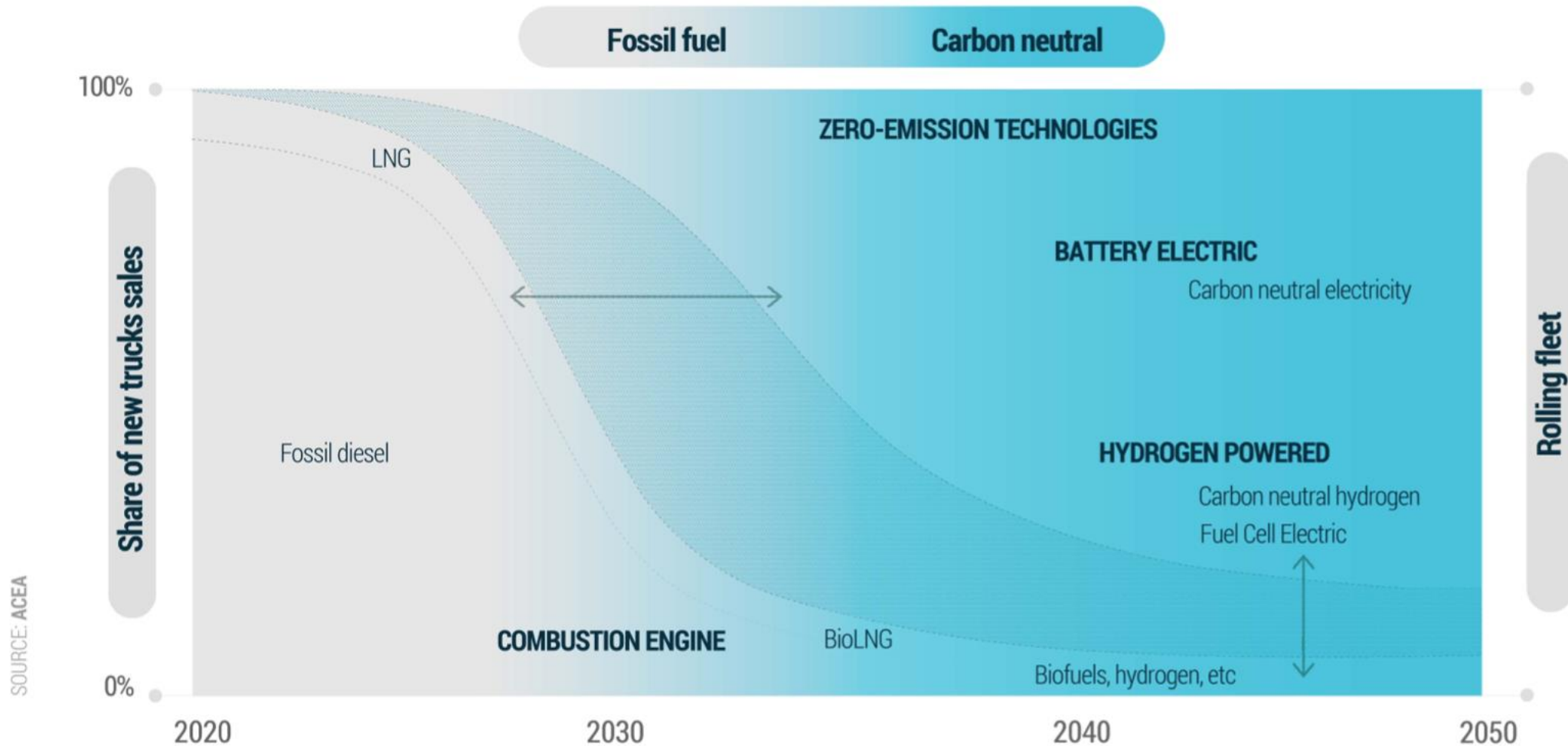
- EU's overall goal is to reach climate neutrality by 2050

Light-duty CO2	Heavy-duty (> 7.5t) & coaches CO2
-15% by 2025	
-55% cars and -50% vans by 2030	-45% by 2030 (-90% urban buses)
-100% by 2035	-65% by 2035 (-100% urban buses)
	-90% by 2040

- Euro 7/VII legislation in parallel:
 - Massive investments in zero-emission technologies
 - Euro 7 is not “soft” - claimed low costs and high benefits are not there
 - Coordination needed between Euro 7 and CO2 policy

DECARBONISATION PATHWAYS

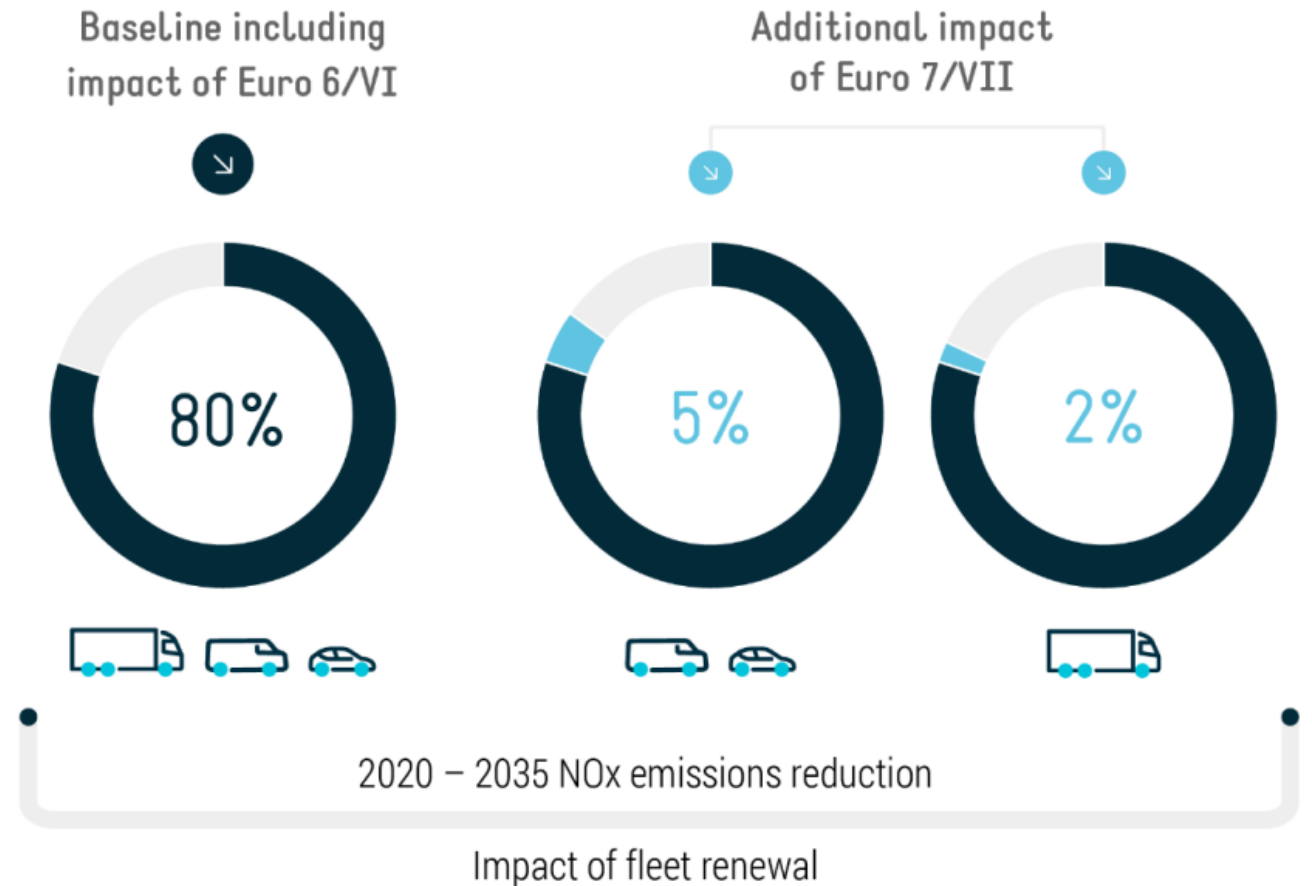
FOSSIL-FREE BY 2040



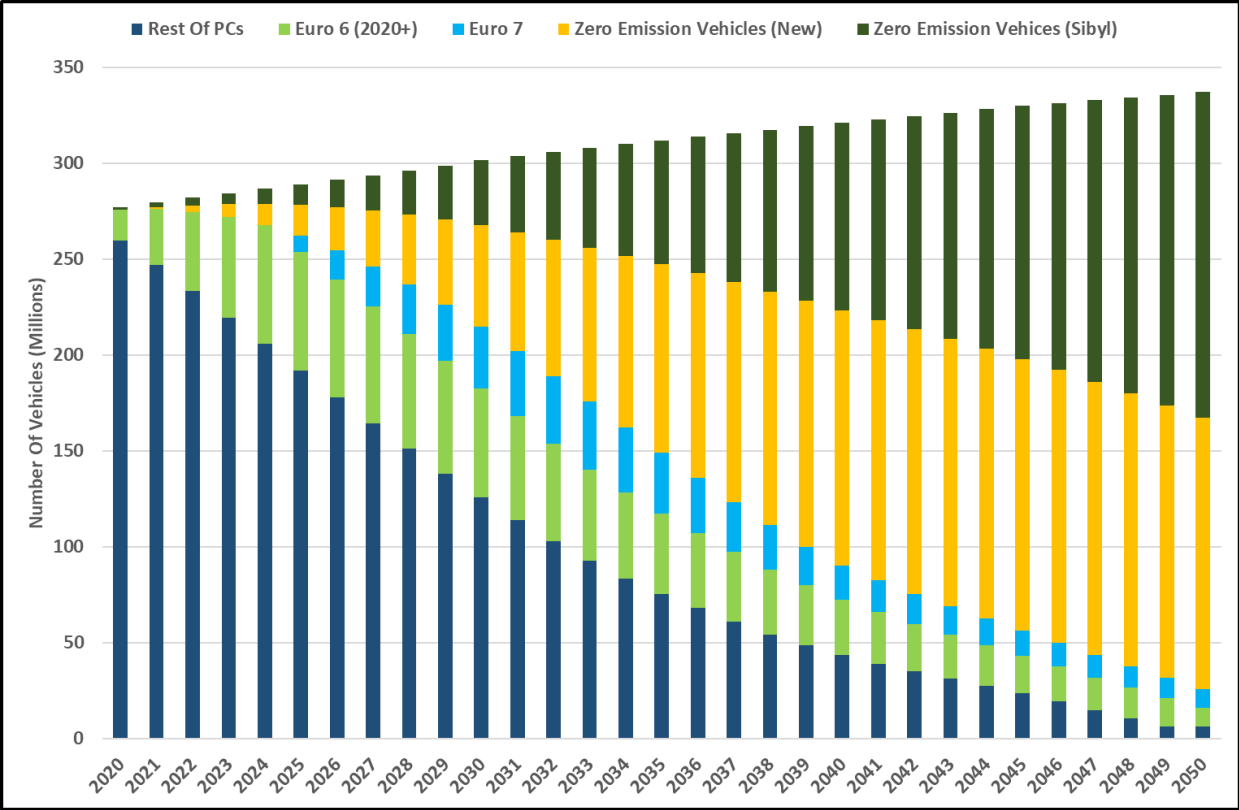
SOURCE: ACEA

MARGINAL IMPACT ON AIR QUALITY *

- Euro 7 will have a marginal impact on road transport NOx emissions
- Renewal of older fleet with latest Euro 6 / VI vehicles, alongside electrification, would deliver 80% reduction in road transport NOx emissions

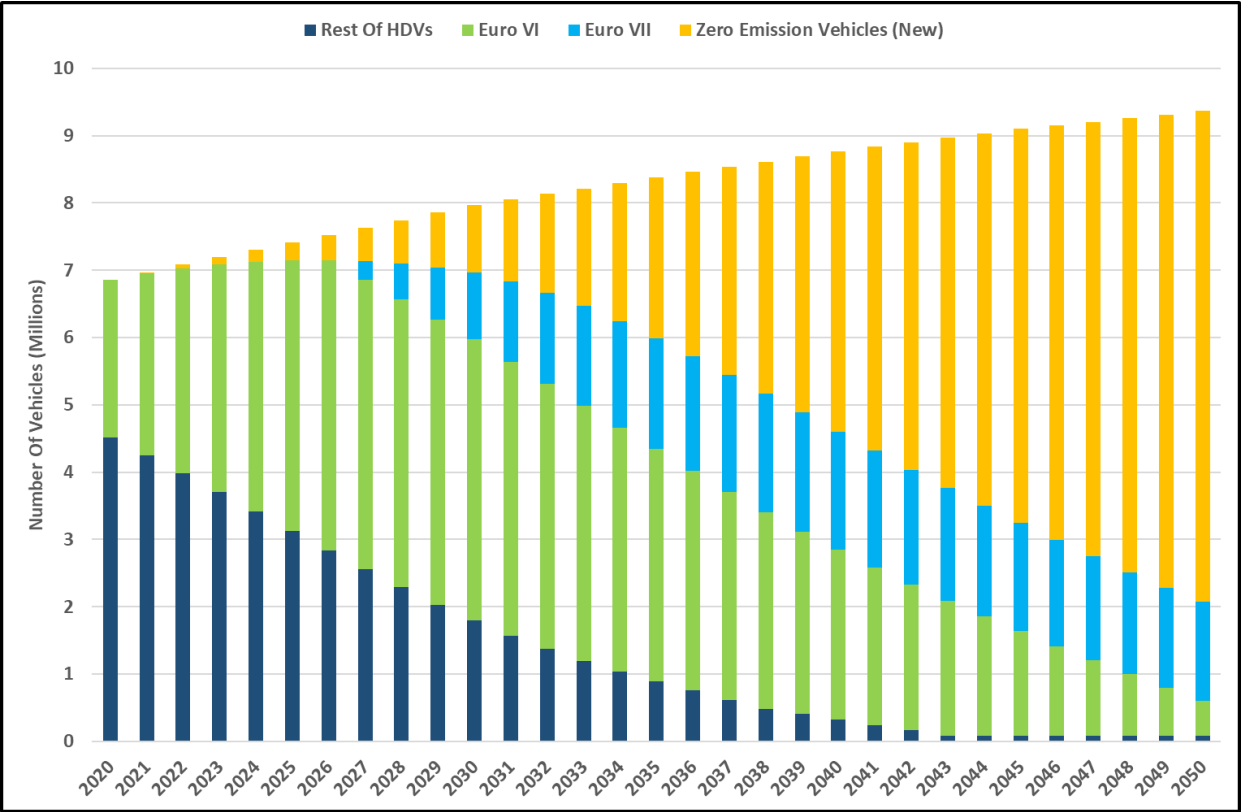


EURO 7 FLEETS



↑ Estimated Euro 7 [fossil ICE] fleet - cars

↓ Estimated Euro 7 [fossil ICE] fleet - HDV



IMPACTING ON AIR QUALITY?

- Vehicle manufacturers are playing their part with latest clean vehicles
- Euro 6 / VI fleet renewal is making a difference, but should be accelerated
- Euro 7 will deliver marginal benefit as move to zero tailpipe emission gathers pace - but still open questions on infrastructure
- Non-exhaust vehicle particle emissions will be the future focus
- EU internal market for new vehicles remains key - local city measures should not become a patchwork that confuses the public
- ACEA & CONCAWE collaborated on a science-based study to help advocate these (and other) messages