Industry perspectives on technology and regulatory framework

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GRPE workshop on low- and zero- emissions heavy duty vehicles
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GROWING TRANSPORT DEMAND

- Reduction in new-vehicle CO2 emissions have been offset by growing transport demand
  - Average improvement of vehicle fuel-efficiency ~ >1.0% pa
  - Growth in road freight transport >20% since 2000
96.5% OF ALL TRUCKS RUN ON DIESEL

- 1 out of every 10,000 vehicles in EU is electrically chargeable
- 2.9% of all trucks run on natural gas
- Manufacturers focus on zero-emission vehicles but market uptake requires coherent enabling policy framework
• Commitment to carbon-neutrality by 2050 at the latest.

• Regulatory focus on zero-emission technologies but low-/ zero-carbon fuels necessary to decarbonize current vehicle fleet

• Clean electricity, hydrogen and low-/ zero-carbon fuels are crucial for the transition

• Vehicle deployment will only be successful if infrastructure is rolled out rapidly

• Commitment of all stakeholders/policy makers must match ambition level set for vehicle industry

• OEMs ready to support roll-out by collaborating with public and private stakeholders

• Zero-emission vehicles will have to become best option and preferred choice of transport operators.

• Enabling policy framework is indispensable to close TCO-gap

• Carbon Pricing policy is depending on the area.

• Decarbonisation requires clear focus and all resources to be devoted exclusively to reaching target as soon as possible.
TECHNOLOGY ROADMAP

• Regulatory framework requires low-/zero-emission technologies to backbone of road freight transport fast
  o BEV
  o FCEV
  o H₂ ICE
  o Other

• In parallel, decarbonisation of all energy carriers is crucial
CONCLUSIONS

• HDV CO₂ regulations effectively push for low-/zero-emission vehicles

• Complementary enabling policy framework still largely missing
  o Truck-suitable charging and refuelling infrastructure
  o Carbon Pricing policy is depending on the area.

• International harmonisation should be pursued urgently