

Zahlen & Fakten zum Flottenmarkt Austria

Marc Odinius - CEO

Agenda

Flottenmarkt als Vorreiter

- Allgemeine Marktentwicklung
- Entwicklung der Kraftstoffarten
- CO2 Ziele – realistisch oder utopisch
- Fragen

An aerial photograph of a winding asphalt road that curves through a dense, lush green forest. Several cars are visible on the road, including a white car, a red car, and a dark car. The road has yellow lane markings. The text 'Allgemeine Marktentwicklung' is overlaid in white, with a thin green horizontal line underneath it.

Allgemeine Marktentwicklung

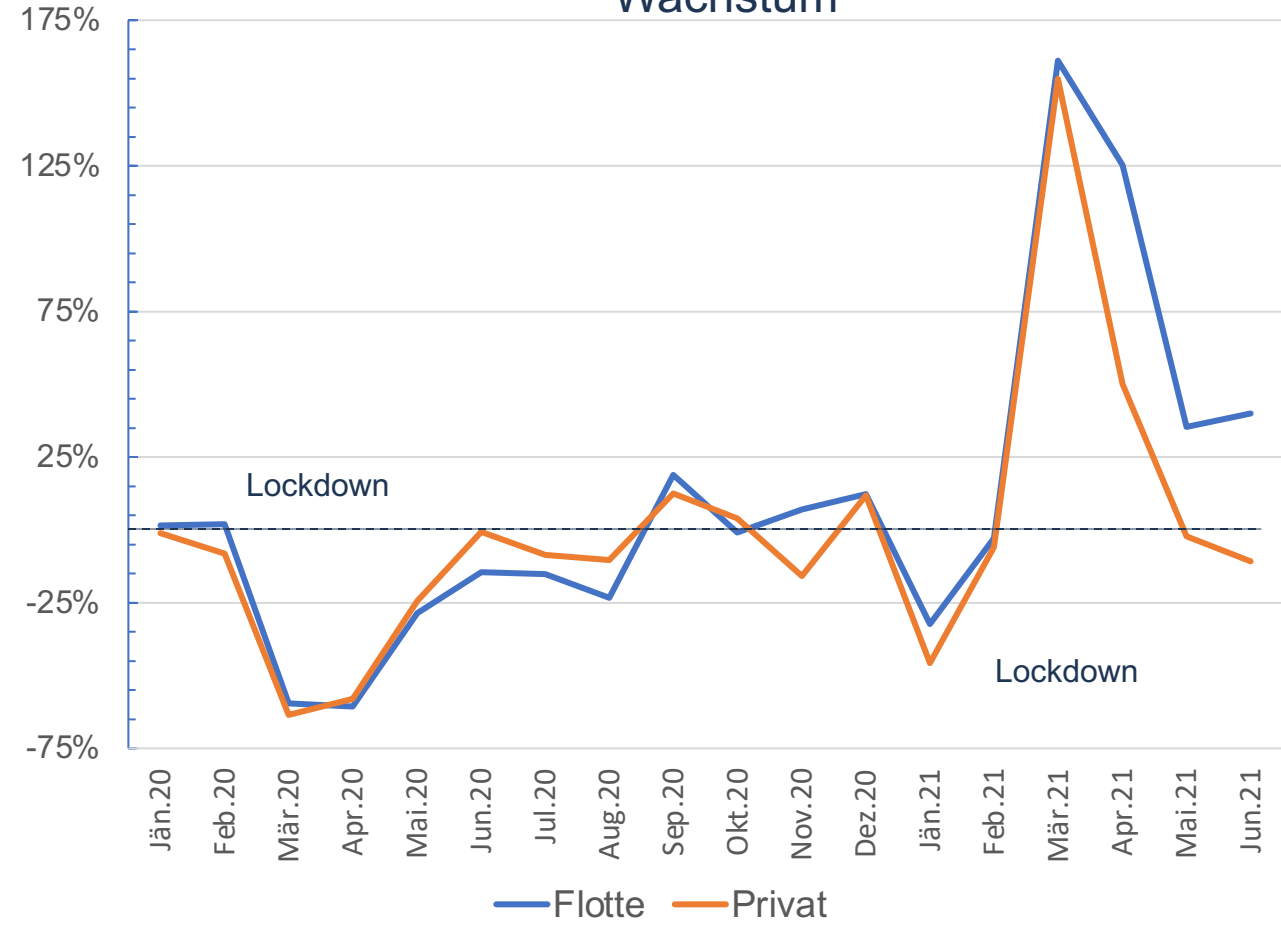
Allgemeine Marktentwicklung Pkw

Flotte & Privat

Absolut



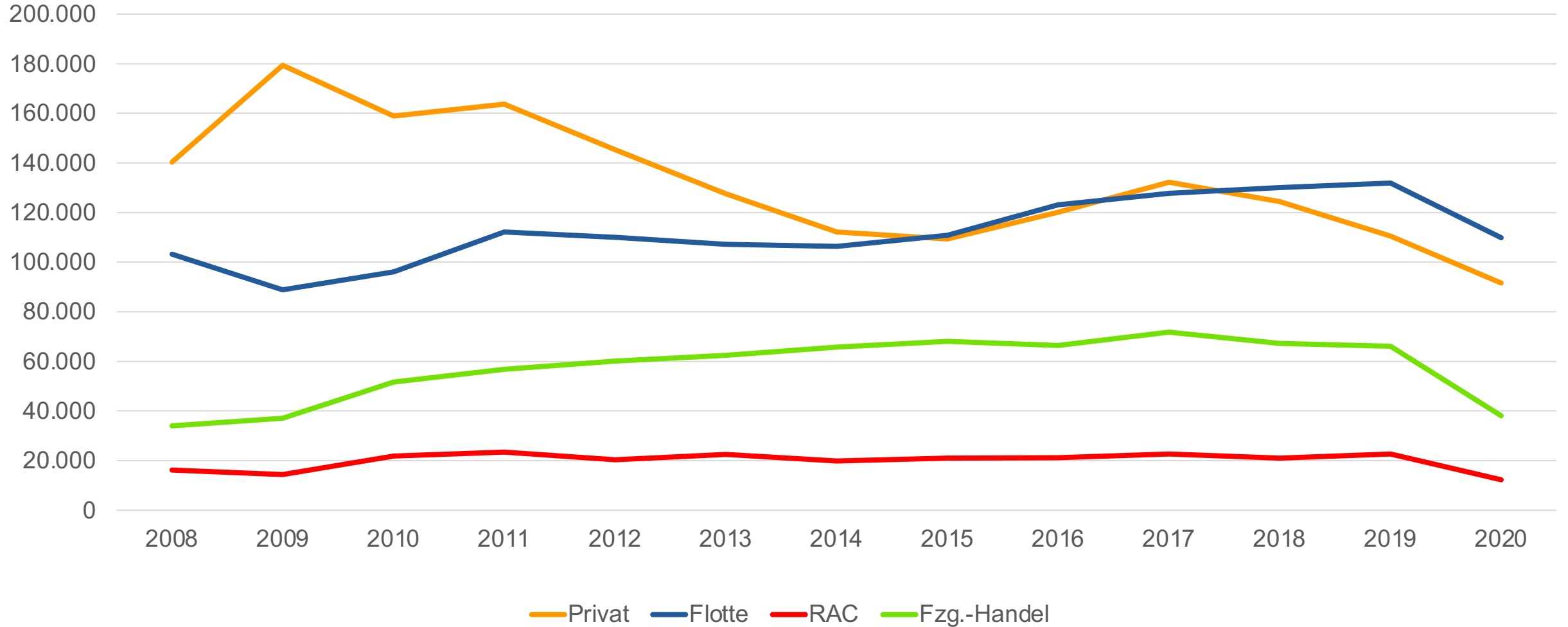
Wachstum



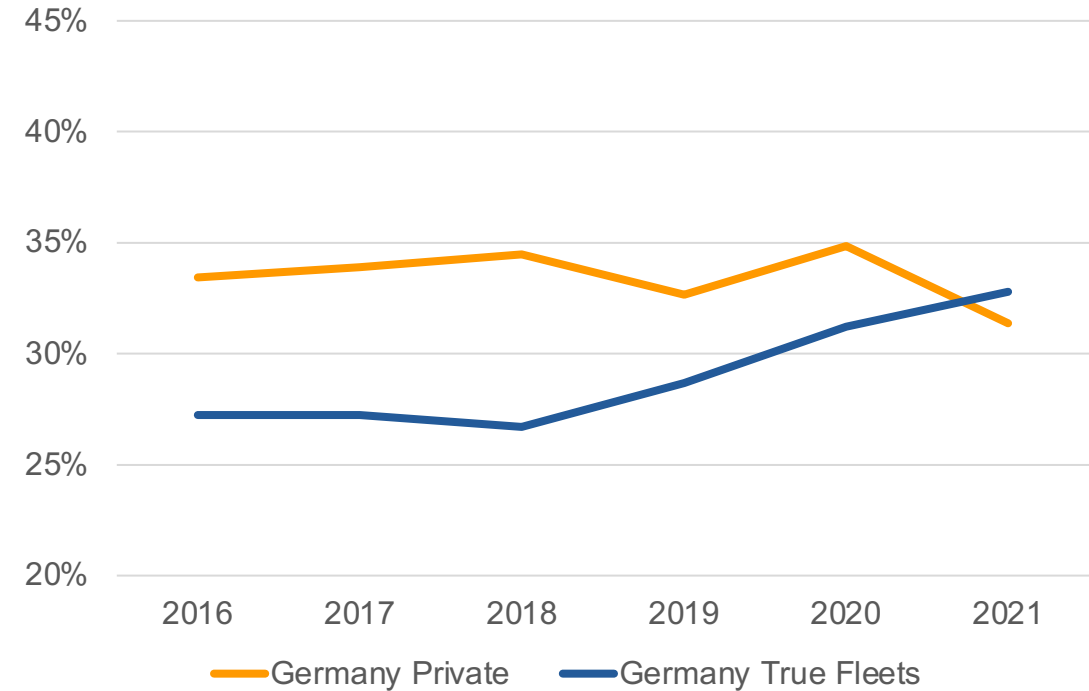
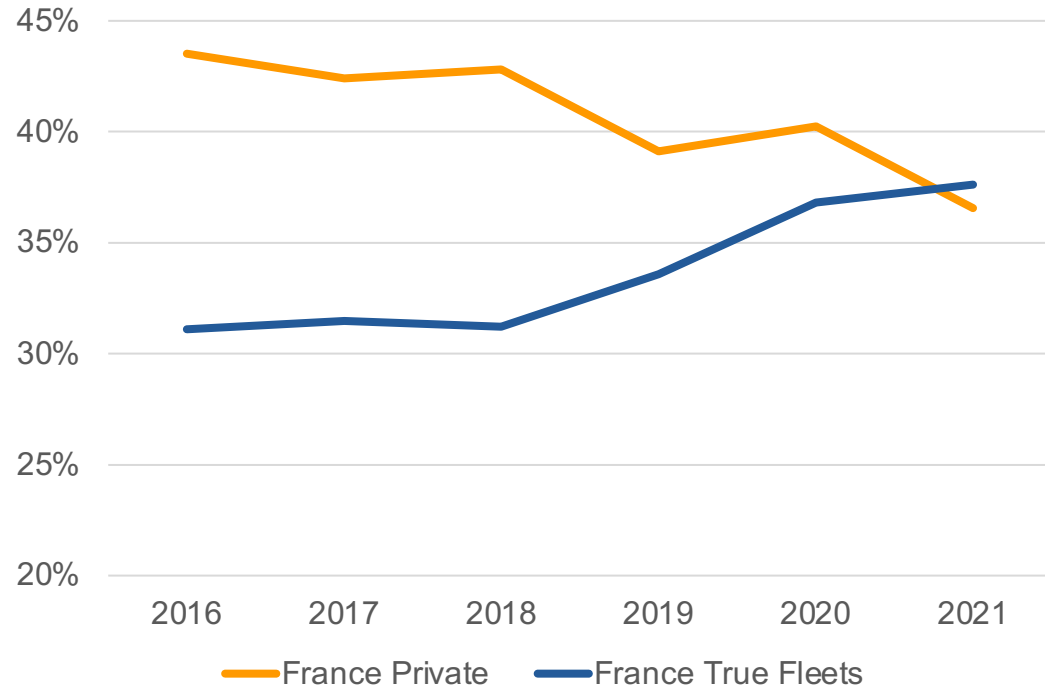
	Flotte	Privat
2020 vs 2019	- 25%	- 17%
2021 vs 2020	+ 25%	+ 7%
2021 vs 2019	- 12%	- 24%

Allgemeine Marktentwicklung

Pkw – der Wandel zum Flottenmarkt



Flotte gewinnt weiter an Bedeutung nicht nur in Österreich



An aerial photograph of a two-lane asphalt road that curves through a dense, lush green forest. Several cars are visible on the road, including a white car, a red car, and a dark car. The text 'Entwicklung der Kraftstoffarten' is overlaid in white, with a thin green horizontal line underneath it.

Entwicklung der Kraftstoffarten

ROAD 2 ZERO DASHBOARD

Gesamtmarkt

Fuel types

Report Month
August 2021

Month
YTD

Country
Austria+

Segment
(Alle)

Country: Austria+
Channel: Alle
Brand: Alle

Last Refresh Date:
19.09.2021 12:21:07



Top 20 Brands
(ranked by New Regs)



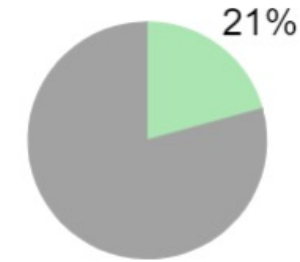
Channel Share
(New Regs)



Average CO2 Development per Fuel type

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total
Total	122	142	-14%	
Petrol	138	144	-4%	48%
Diesel	159	162	-2%	32%
Hybrid	122	120	2%	3%
Plug-In-Hybrid	41	47	-13%	6%
Electric	0	0		12%
Gas	109	118	-8%	0%

Alternative Drive Share (New Regs)



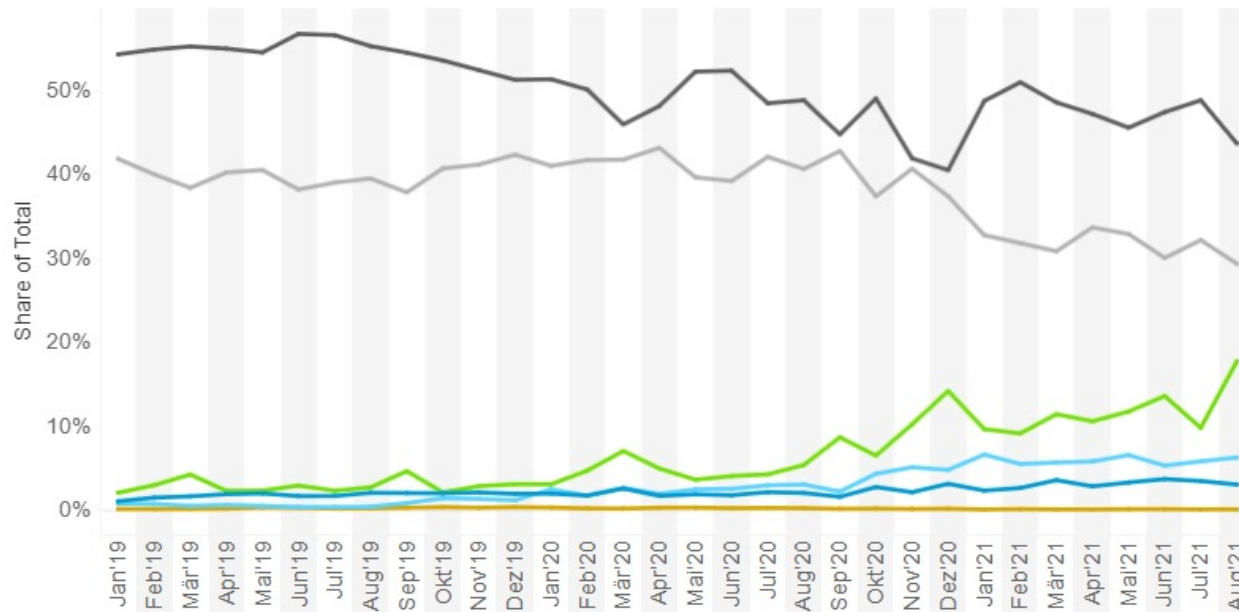
Change Previous Year (New Regs)

+11,8%pts

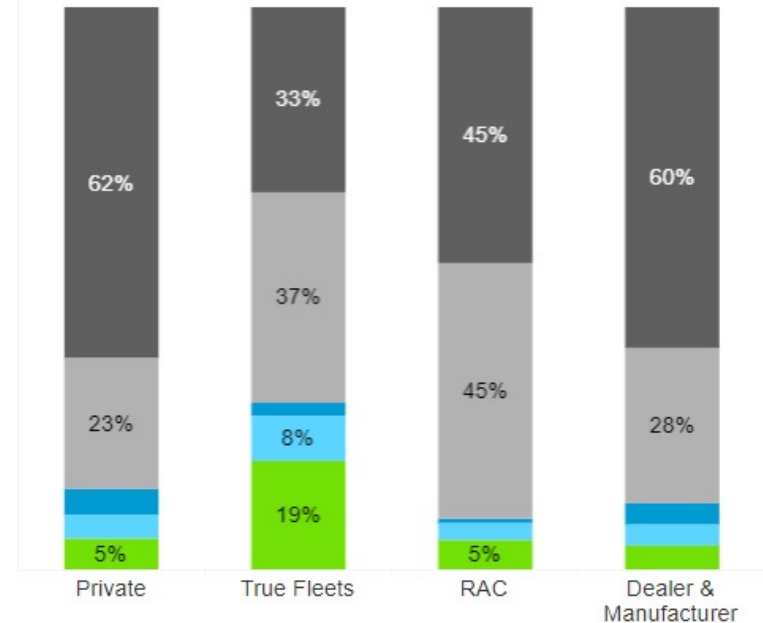


Fuel type Share over Time (New Regs)

change chart



Fuel type Share per Channel (New Regs)



ROAD 2 ZERO DASHBOARD

Privatmarkt

Fuel types

Report Month
August 2021

Month
YTD

Country
Austria+

Segment
(Alle)

Country: Austria+
Channel: Private
Brand: Alle

Last Refresh Date:
19.09.2021 12:21:07



Top 20 Brands
(ranked by New Regs)



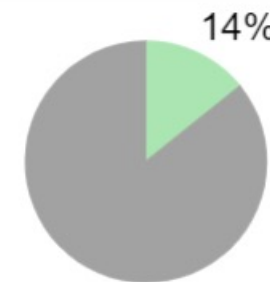
Channel Share
(New Regs)



Average CO2 Development per Fuel type

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total
Total	129	142	-9%	
Petrol	136	142	-4%	62%
Diesel	160	162	-1%	23%
Hybrid	117	118	-1%	4%
Plug-In-Hybrid	39	48	-19%	4%
Electric	0	0		5%
Gas	110	117	-6%	0%

Alternative Drive Share (New Regs)



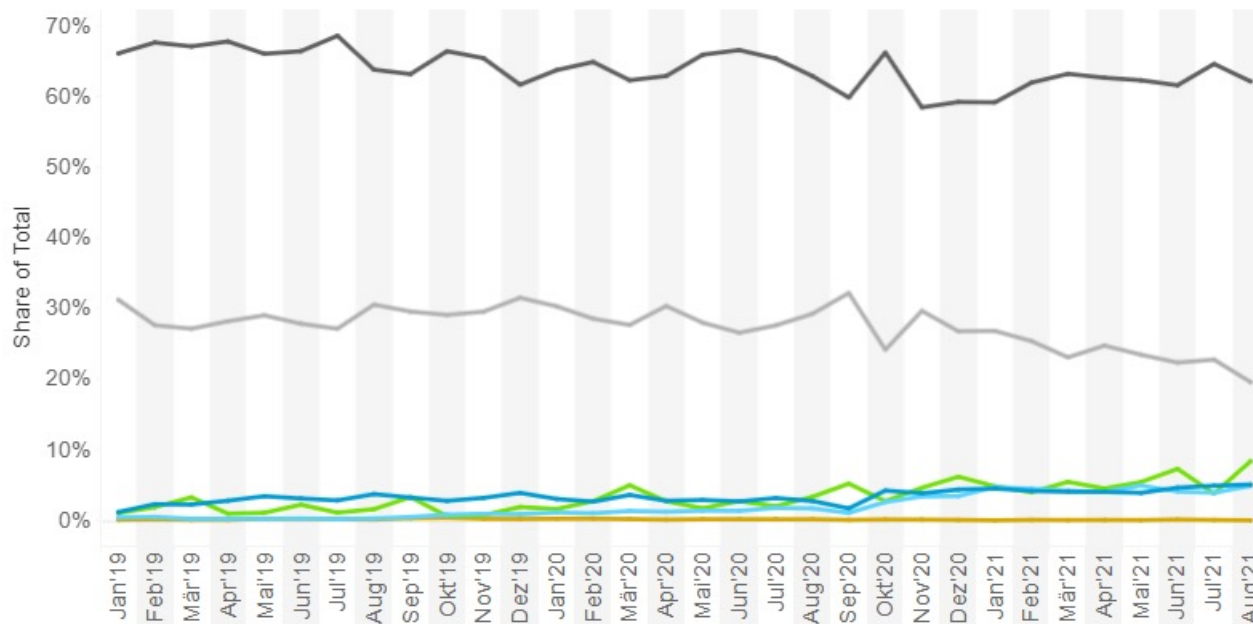
Change Previous Year (New Regs)

+7,3%pts

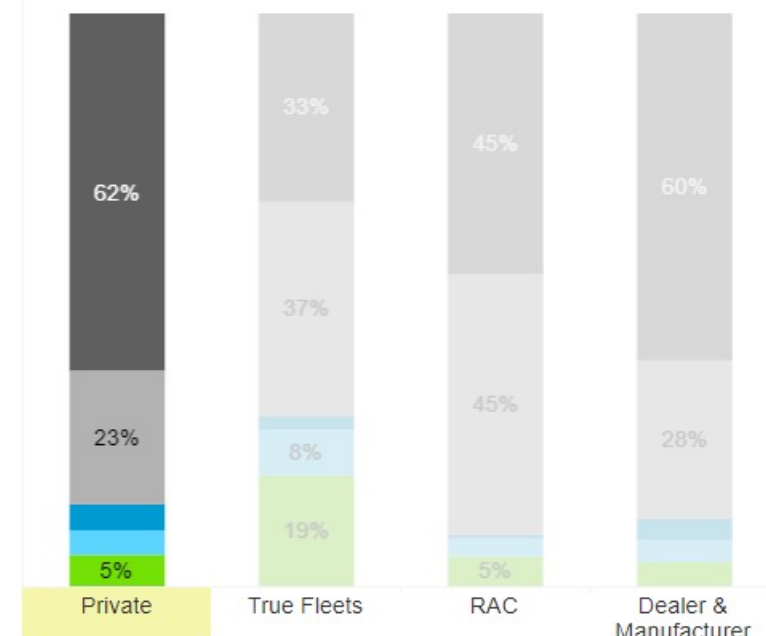


Fuel type Share over Time (New Regs)

change chart



Fuel type Share per Channel (New Regs)



ROAD 2 ZERO DASHBOARD

Flottenmarkt

Fuel types

Report Month
August 2021

Month
YTD

Country
Austria+

Segment
(Alle)

Country: Austria+
Channel: True Fleets
Brand: Alle

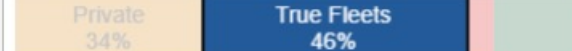
Last Refresh Date:
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Top 20 Brands
(ranked by New Regs)



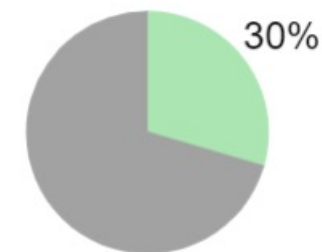
Channel Share
(New Regs)



Average CO2 Development per Fuel type

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total
Total	111	139	-20%	
Petrol	143	148	-3%	33%
Diesel	154	160	-4%	37%
Hybrid	124	125	-1%	2%
Plug-In-Hybrid	41	47	-13%	8%
Electric	0	0		19%
Gas	109	118	-8%	0%

Alternative Drive Share (New Regs)



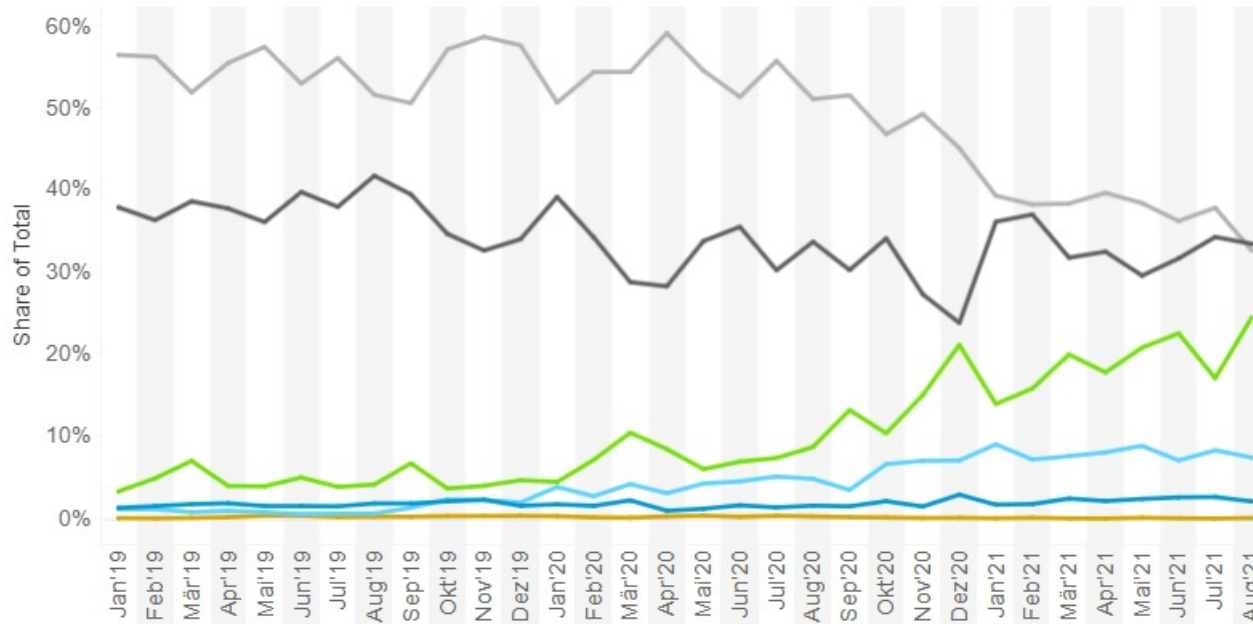
Change Previous Year (New Regs)

+16,6%pts

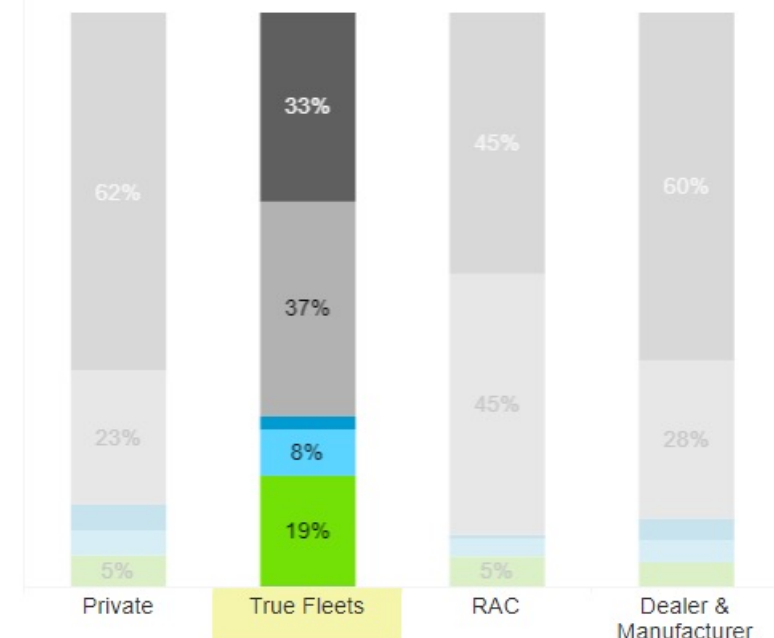


Fuel type Share over Time (New Regs)

change chart



Fuel type Share per Channel (New Regs)



ROAD 2 ZERO DASHBOARD

Norwegen

Fuel types

Report Month
Juli 2021

Month
 YTD

Country
Norway

Segment
(Alle)

Country: Norway
Channel: Alle
Brand: Alle

Last Refresh Date:
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Top 20 Brands
(ranked by New Regs)



Channel Share
(New Regs)



Average CO2 Development per Fuel type

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total
Total	34	58	-41%	
Petrol	150	162	-7%	5%
Diesel	165	175	-6%	5%
Hybrid	115	124	-7%	7%
Plug-In-Hybrid	39	44	-11%	25%
Electric	0	0		58%
Gas		144		0%

Alternative Drive Share
(New Regs)



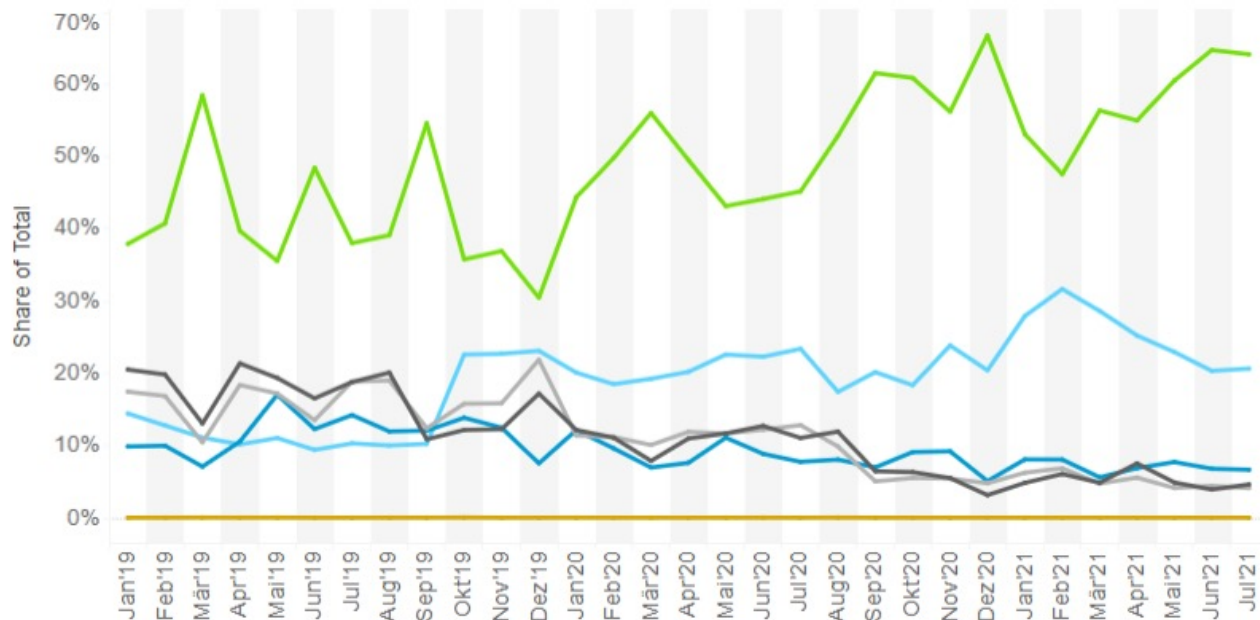
Change Previous Year
(New Regs)

+12,4%pts

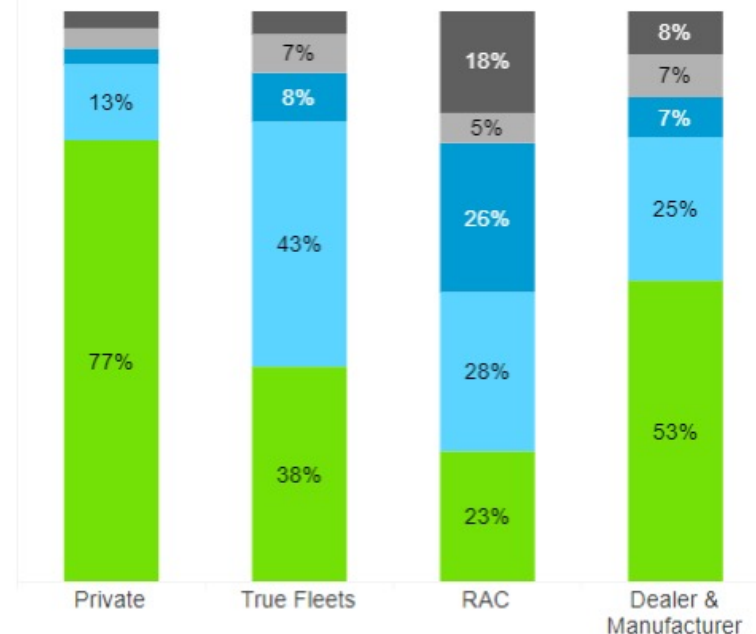


Fuel type Share over Time (New Regs)

change chart



Fuel type Share per Channel (New Regs)






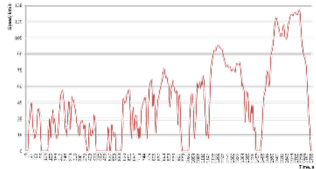
CO2 Ziele

realistisch oder utopisch

CO2 Ziele - Berechnungsschema

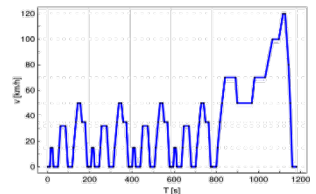
Target

 weight adjusted



WLTP

NEDC



118 g/km



116 g/km



Fuel type specific conversion



95 g/km

Measurement

121 g/km



Avg. CO2 in EU New Registrations



114 g/km

Δ
-4 g/km



Super Credits
x2.00 2020
x1.67 2021
x1.33 2022
x1 ...

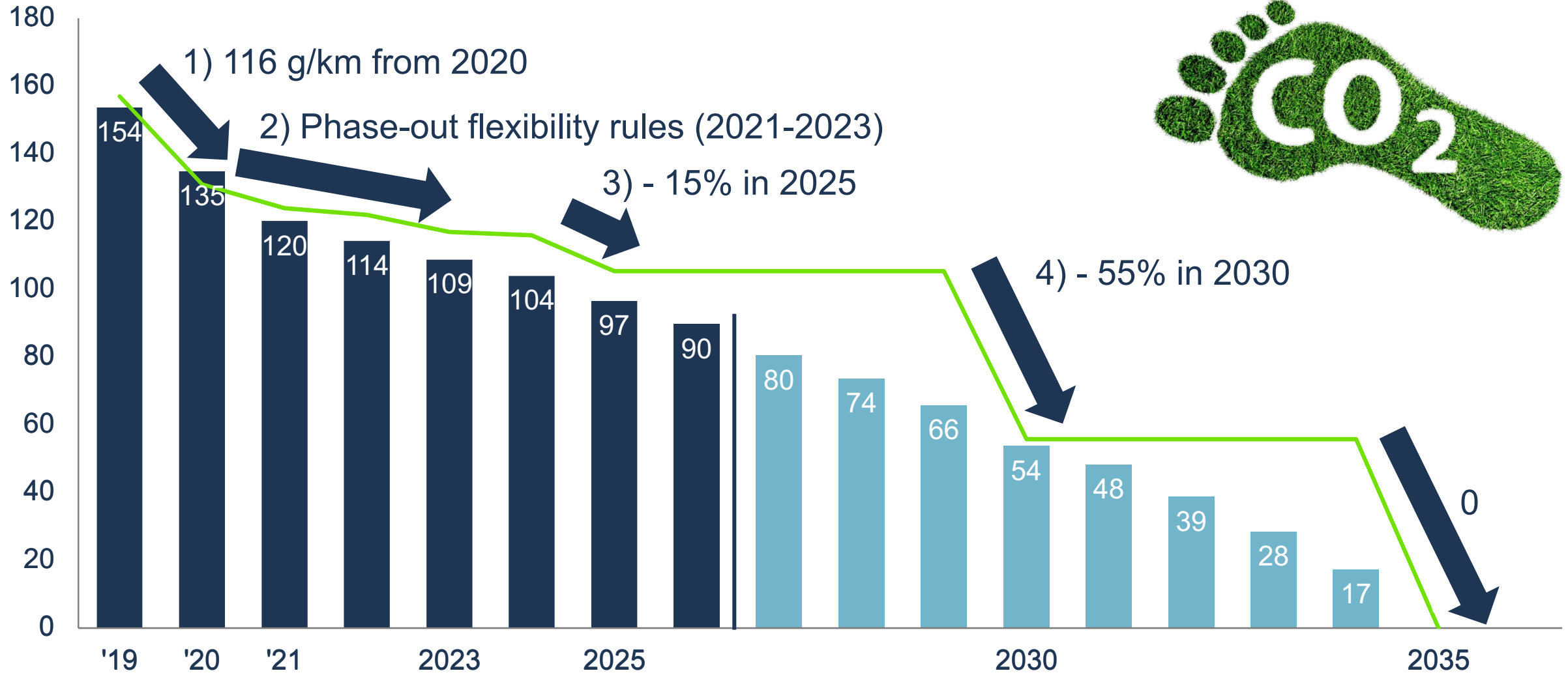


Fines

95 Euros x Δ x Σ Registrations

CO2 Ziele im Zeitverlauf

WTLP g/km, ~NEDC +22%





Countries

Report Month
August 2021

Month
 YTD

Fuel type
(Alle)

Segment
(Alle)

Country: Alle
Channel: Alle
Brand: Alle

Last Refresh Date:
19.09.2021 12:21:07



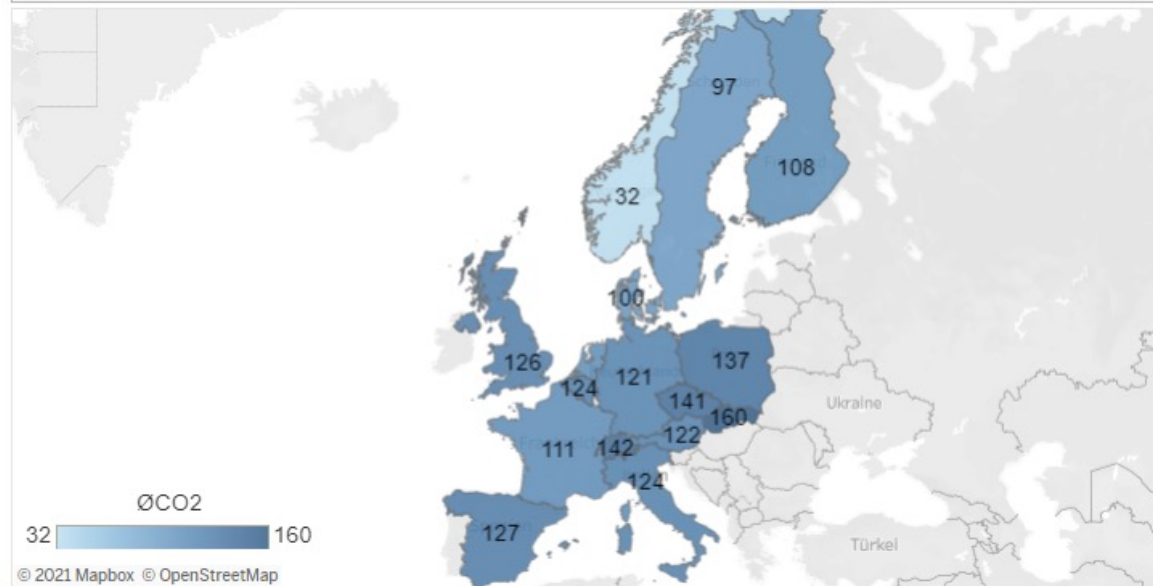
Top 20 Brands
(ranked by New Regs)



Channel Share
(New Regs)



Average CO2 per Country



Average CO2 Emission

120

Average CO2 Reduction

-20

Country with lowest ØCO2

Norway

32

Country with highest ØCO2

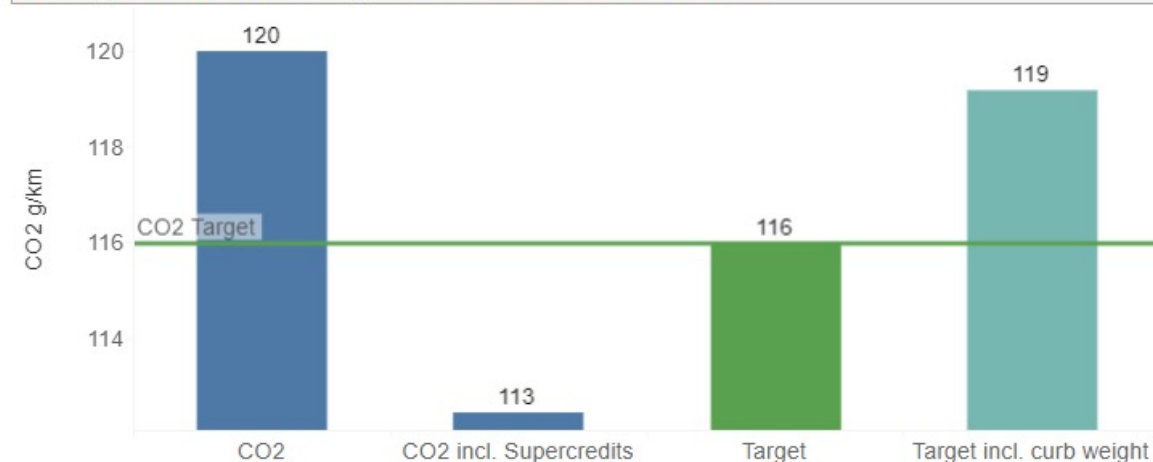
Slovakia

160

Average CO2 Development per Country

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total	ØCO2 over time
Total	120	140	-14%		
Austria+	122	142	-14%	2%	
Belgium	124	136	-9%	4%	
Czech Republic	141	149	-5%	2%	
Denmark	100	123	-19%	2%	
Finland	108	128	-16%	1%	
France	111	122	-9%	15%	
Germany	121	147	-18%	24%	
Italy	124	165	-25%	14%	
Netherlands	108	119	-9%	3%	
Norway	32	58	-45%	1%	
Poland	137	144	-5%	4%	
Slovakia	160	151	6%	1%	
Spain	127	137	-7%	8%	
Sweden	97	122	-20%	3%	
Switzerland	142	163	-13%	2%	
United Kingdom	126	141	-11%	14%	

Average CO2 versus Target (95g Target converted from NEDC to WLTP)



ROAD 2 ZERO DASHBOARD

CO2 Austria

Countries

Report Month: August 2021
 Month: YTD
 Fuel type: (Alle)
 Segment: (Alle)

Country: Austria+
 Channel: Alle
 Brand: Alle

Last Refresh Date:
 19.09.2021 12:21:07



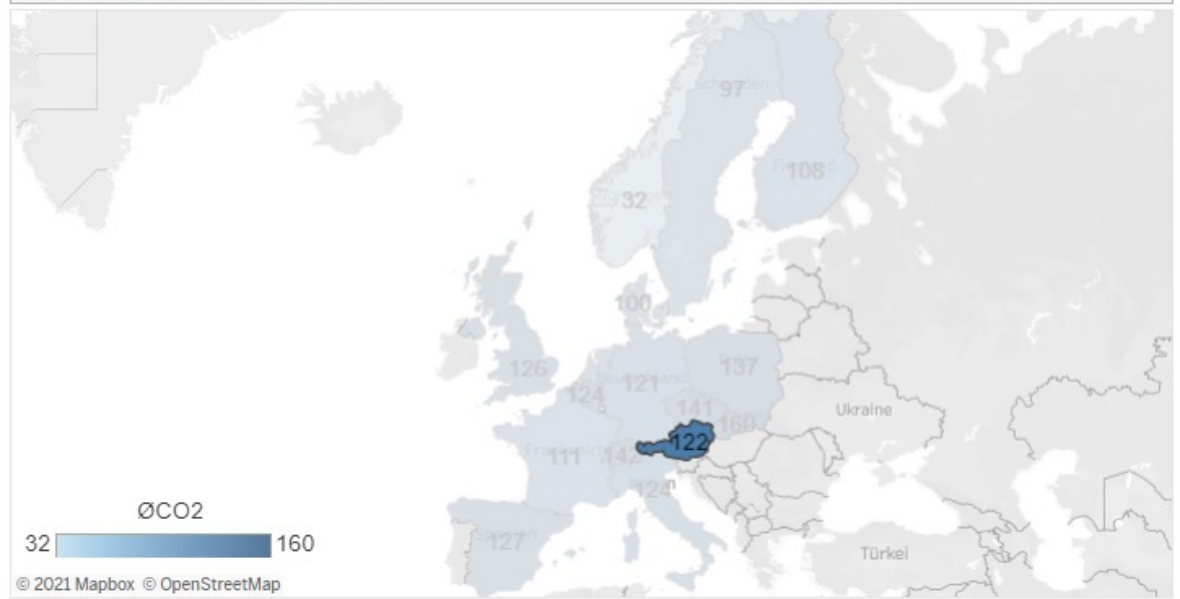
Top 20 Brands
 (ranked by New Regs)



Channel Share
 (New Regs)



Average CO2 per Country



Average CO2 Emission
 122

Average CO2 Reduction
 -20

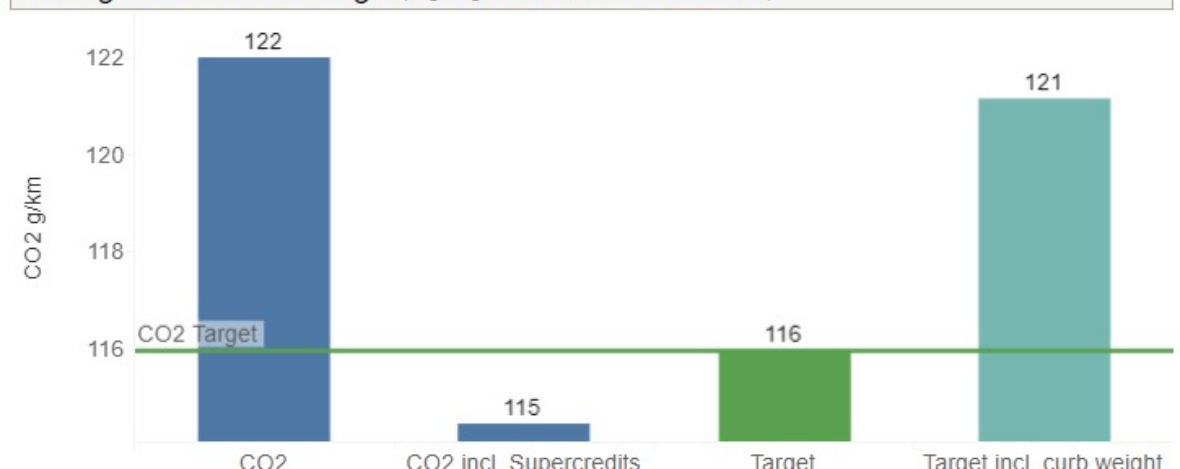
Country with lowest ØCO2
 Norway 32

Country with highest ØCO2
 Slovakia 160

Average CO2 Development per Country

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total	ØCO2 over time
Total	120	140	-14%		
Austria+	122	142	-14%	2%	
Belgium	124	136	-9%	4%	
Czech Republic	141	149	-5%	2%	
Denmark	100	123	-19%	2%	
Finland	108	128	-16%	1%	
France	111	122	-9%	15%	
Germany	121	147	-18%	24%	
Italy	124	165	-25%	14%	
Netherlands	108	119	-9%	3%	
Norway	32	58	-45%	1%	
Poland	137	144	-5%	4%	
Slovakia	160	151	6%	1%	
Spain	127	137	-7%	8%	
Sweden	97	122	-20%	3%	
Switzerland	142	163	-13%	2%	
United Kingdom	126	141	-11%	14%	

Average CO2 versus Target (95g Target converted from NEDC to WLTP)



ROAD 2 ZERO DASHBOARD

CO2 Austria
Flottenmarkt

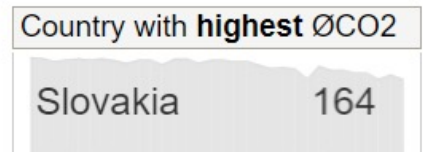
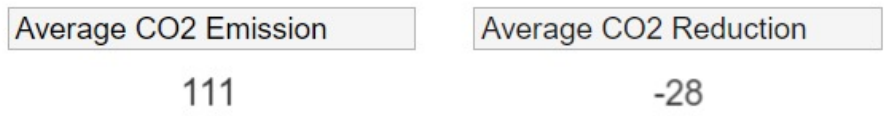
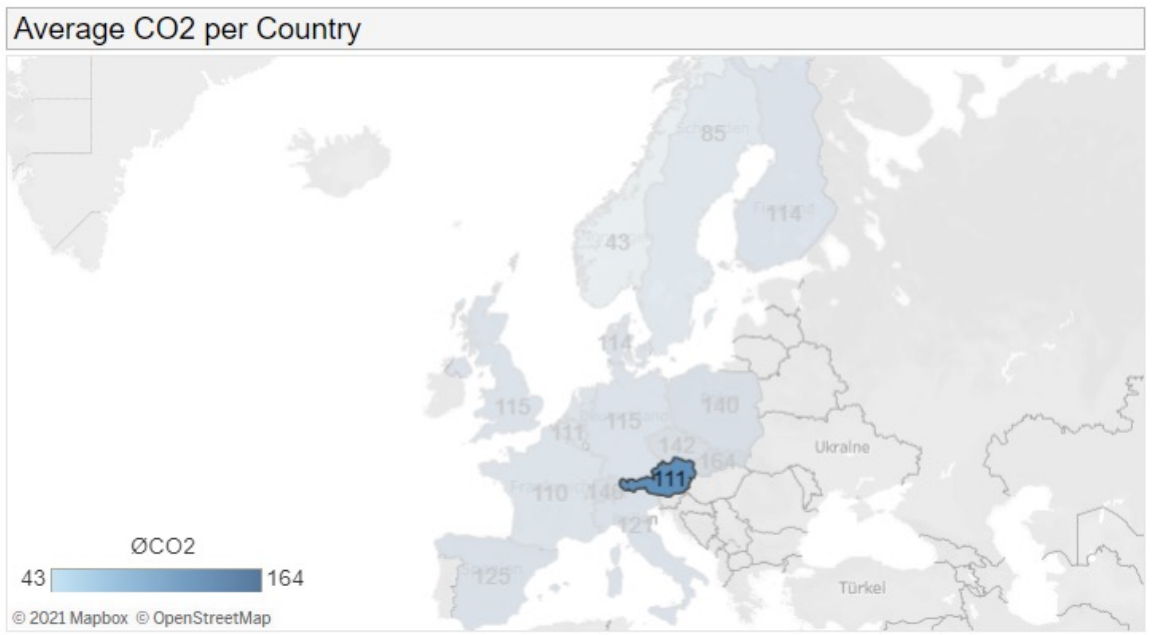
Countries

Report Month: August 2021
 Month: YTD
 Fuel type: (Alle)
 Segment: (Alle)

Country: Austria+
 Channel: True Fleets
 Brand: Alle

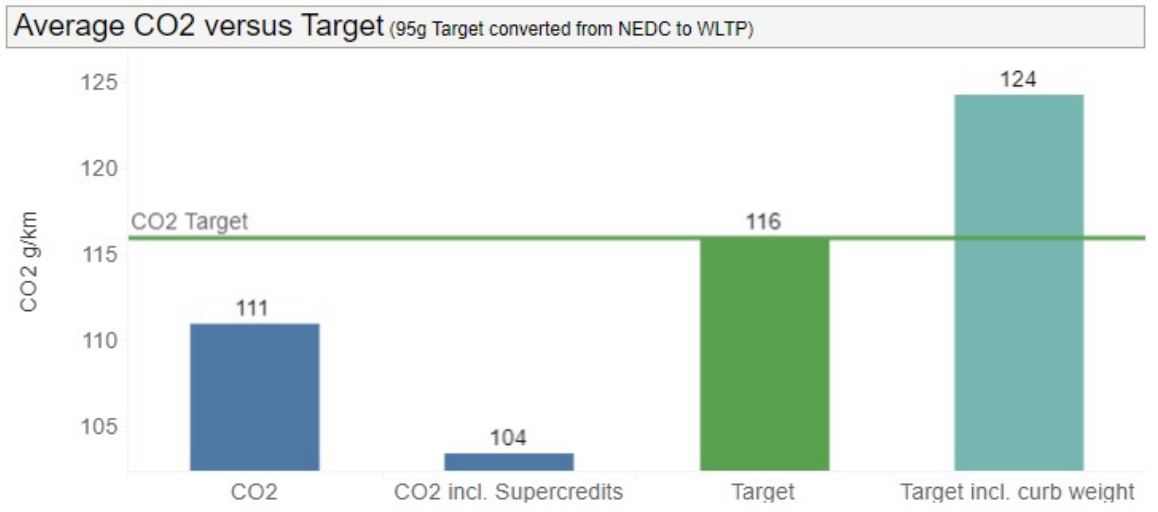
Last Refresh Date: 19.09.2021 12:21:07
DATAFORCE

Top 20 Brands (ranked by New Regs)



Average CO2 Development per Country

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total	ØCO2 over time
Total	116	138	-16%		
Austria+	111	139	-20%	3%	
Belgium	111	129	-14%	5%	
Czech Republic	142	150	-5%	3%	
Denmark	114	133	-14%	2%	
Finland	114	137	-17%	1%	
France	110	122	-10%	13%	
Germany	115	145	-21%	22%	
Italy	121	172	-30%	10%	
Netherlands	105	117	-10%	4%	
Norway	43	65	-34%	1%	
Poland	140	147	-5%	7%	
Slovakia	164	159	3%	1%	
Spain	125	137	-9%	6%	
Sweden	85	108	-21%	3%	
Switzerland	146	168	-13%	1%	
United Kingdom	115	133	-14%	17%	



ROAD 2 ZERO DASHBOARD

CO2 Austria
Flottenmarkt
Alle Segmente
Nach Marken

Brands

Report Month: August 2021 | Country: Austria+ | Last Refresh Date: 19.09.2021 12:21:07

Channel: True Fleets | Brand: Alle

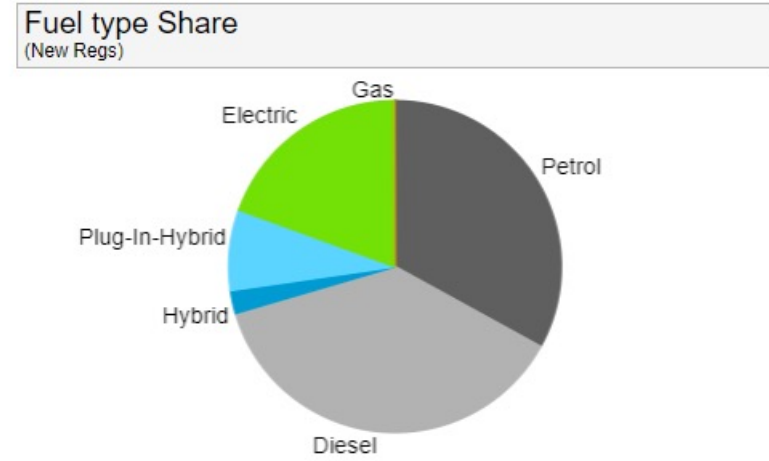
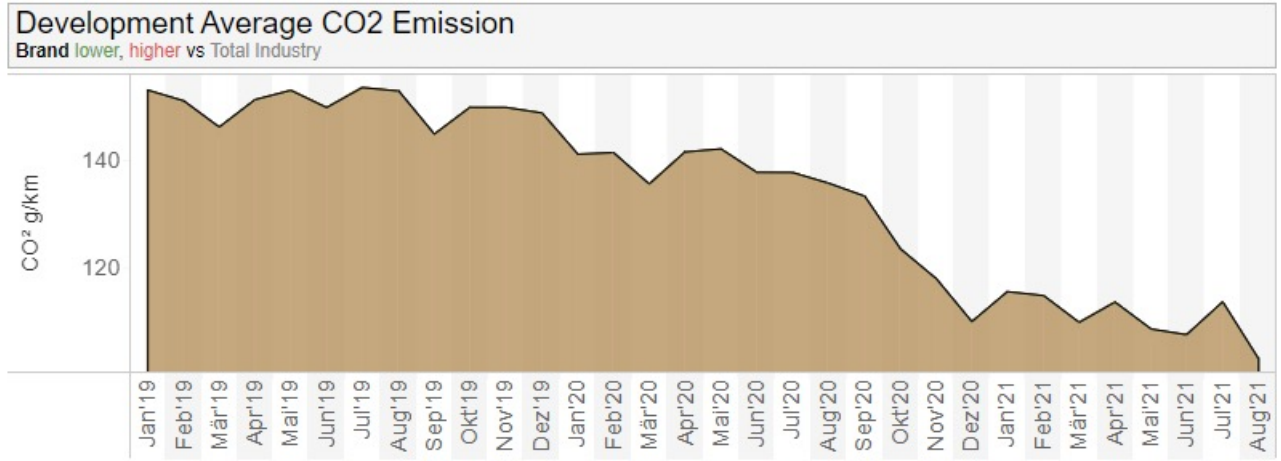
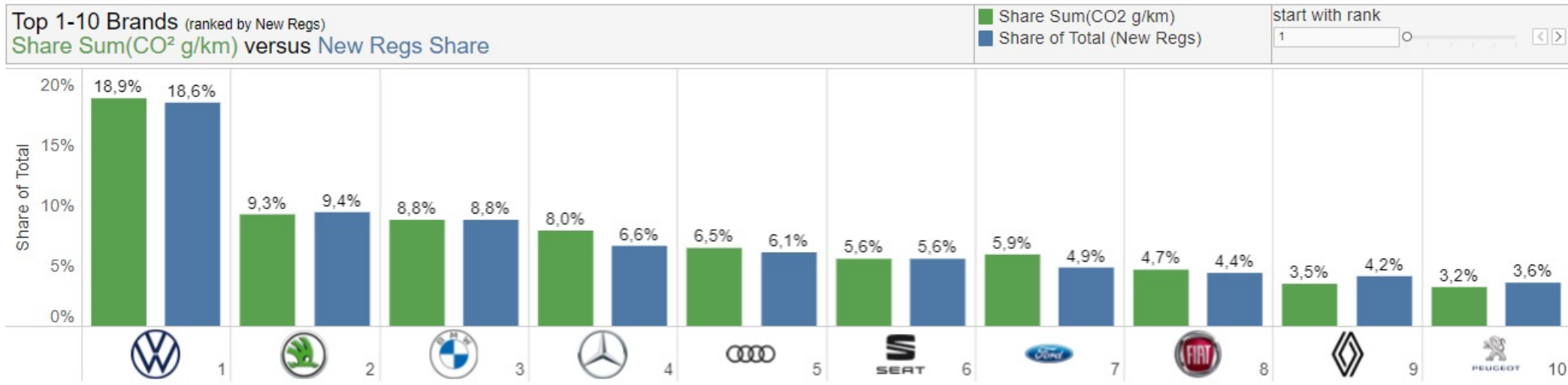
Channel Share (New Regs): Private 34% | True Fleets 46%

Lowest ØCO2 Brand: 0g | Highest ØCO2 Brand: 237g

Brand Share Filter: 0,1%

Top Segments (ranked by New Regs): PC Compact, SUV, SUV, PC, PC

Share Sum(CO₂ g/km): 0% to 16%



Brands

Report Month

August 2021

Month

YTD

Country

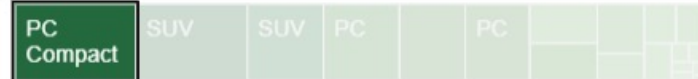
Austria+

Country: Austria+
Channel: True Fleets
Brand: Alle

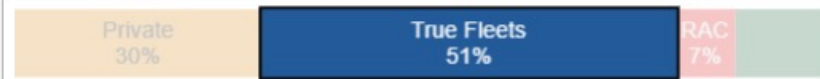
Last Refresh Date:
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Top Segments
(ranked by New Regs)



Channel Share
(New Regs)



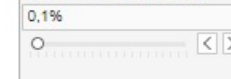
Lowest ØCO₂ Brand



Highest ØCO₂ Brand



Brand Share Filter



Top 1-10 Brands (ranked by New Regs)

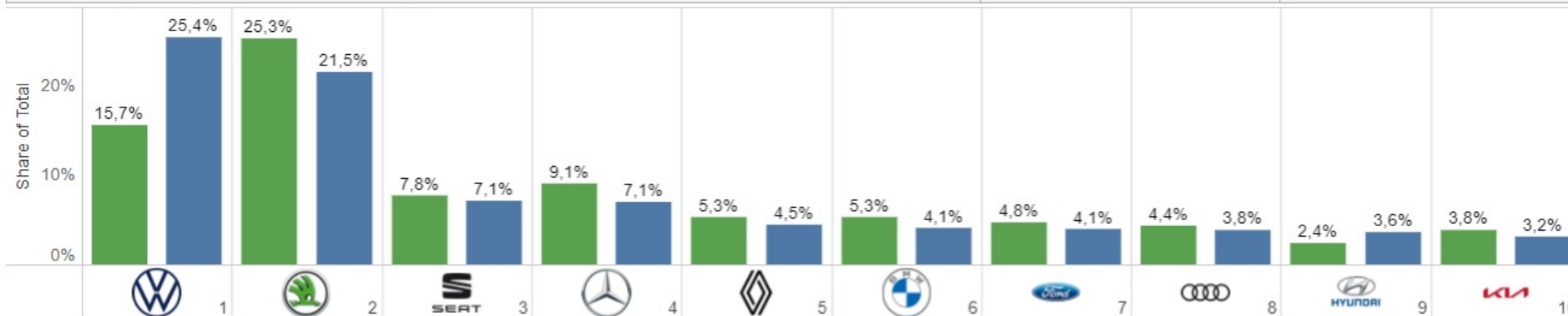
Share Sum(CO² g/km) versus New Regs Share

Share Sum(CO₂ g/km)

Share of Total (New Regs)

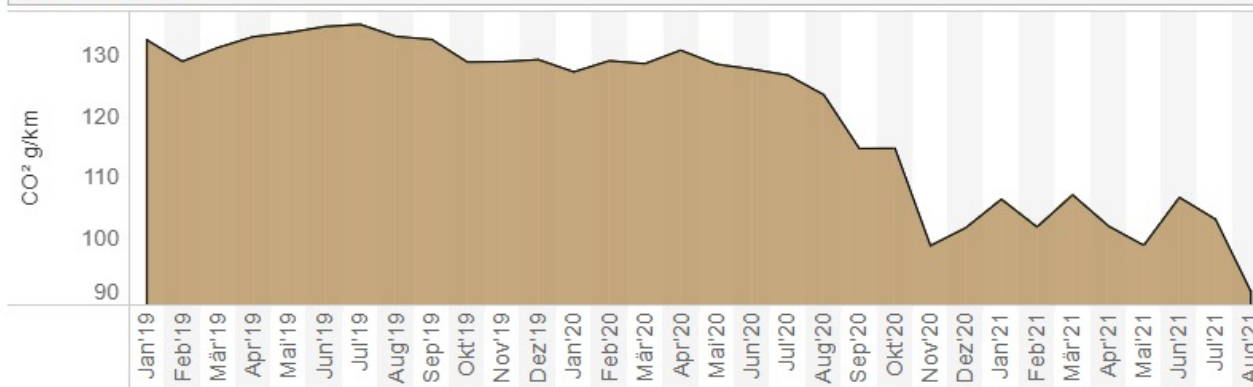
start with rank

1



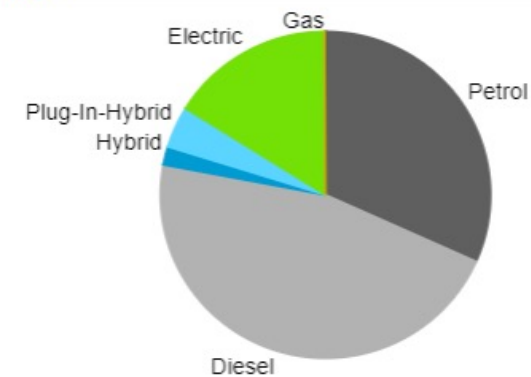
Development Average CO₂ Emission

Brand lower, higher vs Total Industry



Fuel type Share

(New Regs)



ROAD 2 ZERO DASHBOARD

CO₂ Austria
Flottenmarkt
PC Compact
Nach Marken

ROAD 2 ZERO DASHBOARD

CO2 Austria
Flottenmarkt
PC Compact
VW

Brands

Report Month: August 2021 | Country: Austria+ | Channel: True Fleets | Brand: VW | Last Refresh Date: 19.09.2021 12:21:07

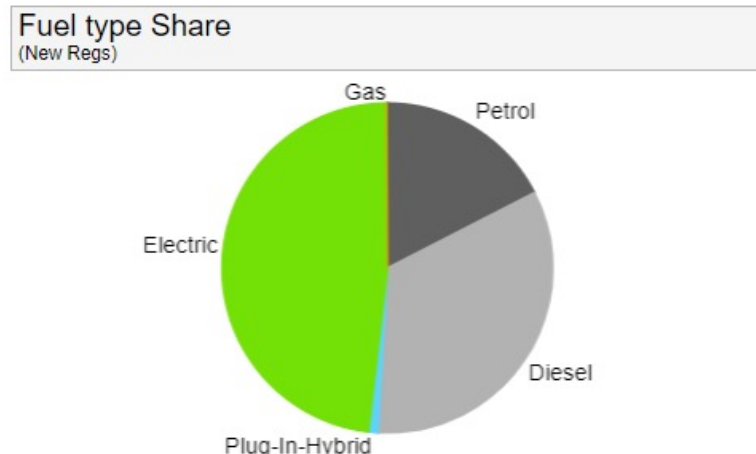
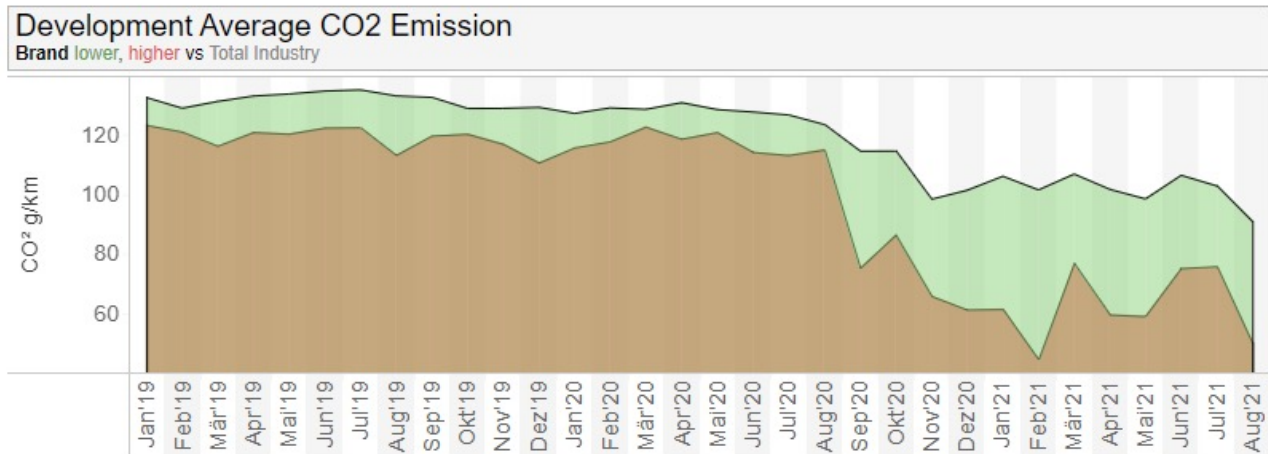
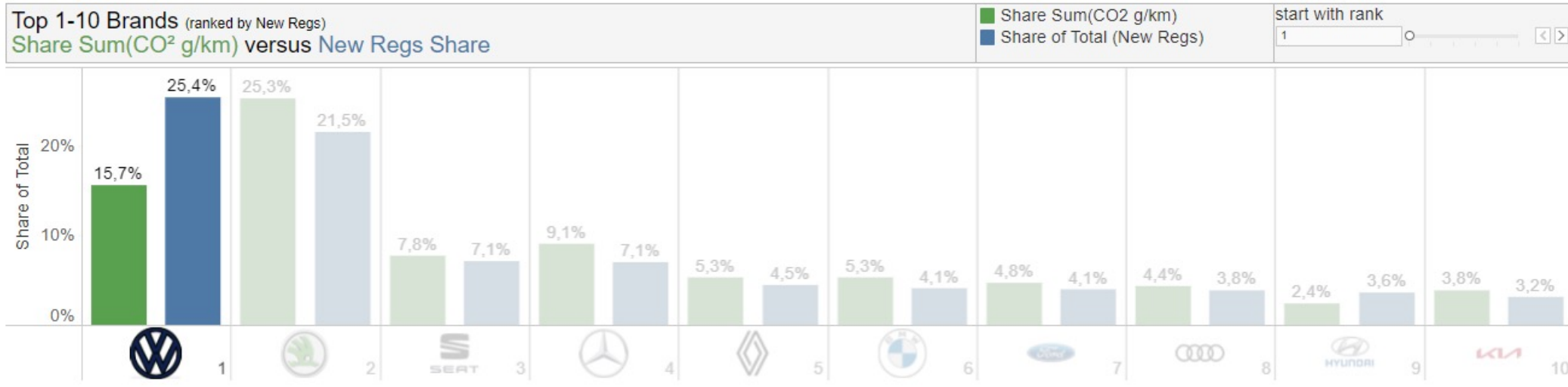
Top Segments (ranked by New Regs): PC Compact, SUV, SUV Small

Channel Share (New Regs): Private 31%, True Fleets 60%

Share Sum(CO₂ g/km) 1% to 23%

Lowest ØCO₂ Brand: NISSAN 0g | Highest ØCO₂ Brand: SUBARU 181g

Brand Share Filter: 0,1%



ROAD 2 ZERO DASHBOARD

CO2 Austria
Flottenmarkt
SUV Compact
VW

Brands

Report Month: August 2021

Country: Austria+

Channel: Austria+
Channel: True Fleets
Brand: VW

Last Refresh Date: 19.09.2021 12:21:07

DATAFORCE

Top Segments (ranked by New Regs)

PC Compact | **SUV** | SUV Small

Share Sum(CO² g/km) 1% - 23%

Channel Share (New Regs)

Private 28% | **True Fleets 56%**

Lowest ØCO2 Brand

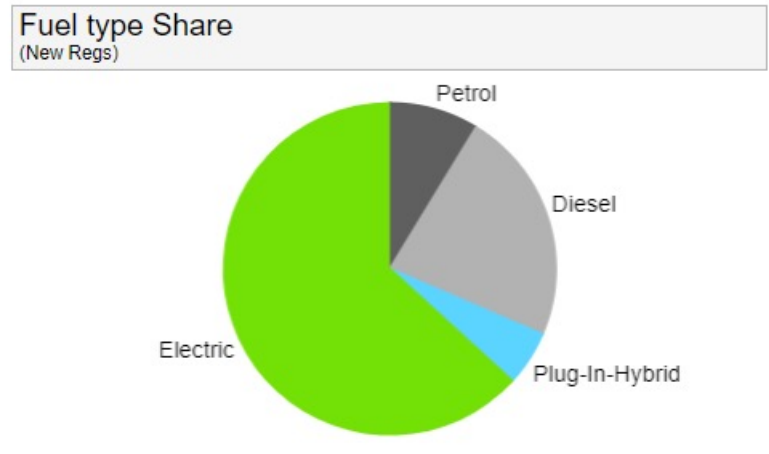
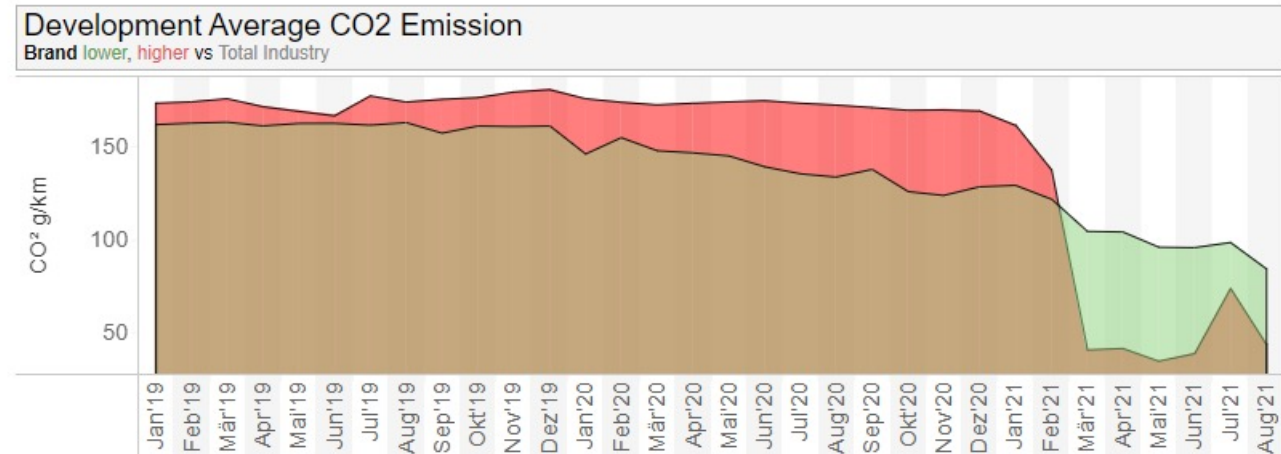
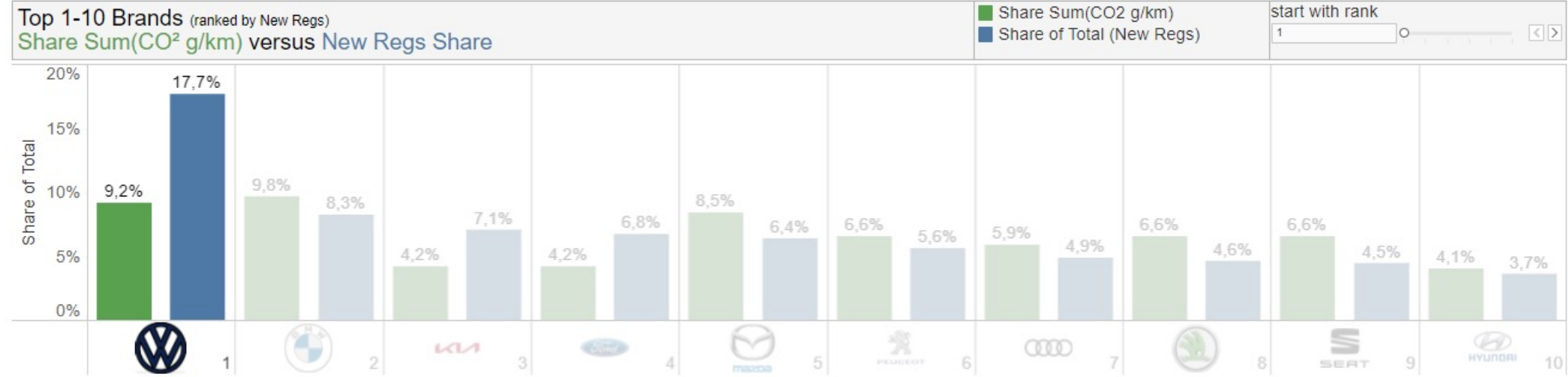
13g

Highest ØCO2 Brand

179g

Brand Share Filter

0,1%



ROAD 2 ZERO DASHBOARD

CO2 Austria
Flottenmarkt

Countries

Report Month: August 2021
 Month: YTD
 Fuel type: (Alle)
 Segment: (Alle)

Country: Austria+
 Channel: True Fleets
 Brand: Alle

Last Refresh Date:
 19.09.2021 12:21:07



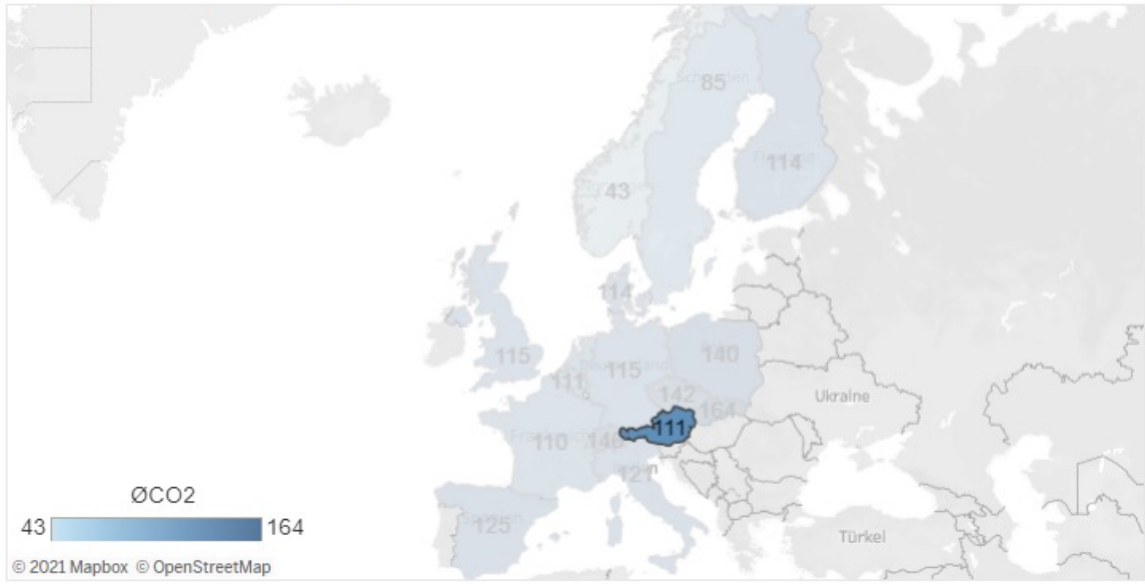
Top 20 Brands
 (ranked by New Regs)



Channel Share
 (New Regs)



Average CO2 per Country



Average CO2 Emission

111

Average CO2 Reduction

-28

Country with lowest ØCO2

Norway 43

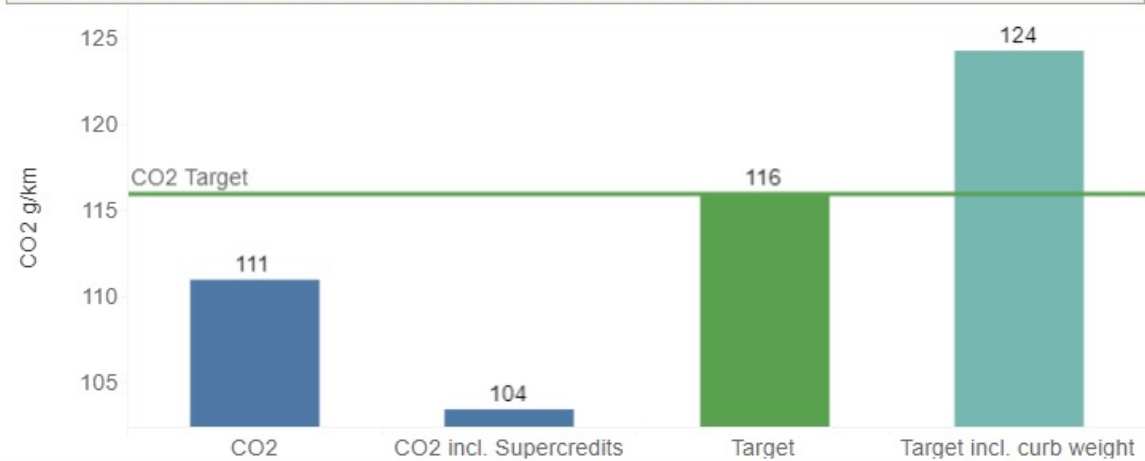
Country with highest ØCO2

Slovakia 164

Average CO2 Development per Country

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total	ØCO2 over time
Total	116	138	-16%		
Austria+	111	139	-20%	3%	
Belgium	111	129	-14%	5%	
Czech Republic	142	150	-5%	3%	
Denmark	114	133	-14%	2%	
Finland	114	137	-17%	1%	
France	110	122	-10%	13%	
Germany	115	145	-21%	22%	
Italy	121	172	-30%	10%	
Netherlands	105	117	-10%	4%	
Norway	43	65	-34%	1%	
Poland	140	147	-5%	7%	
Slovakia	164	159	3%	1%	
Spain	125	137	-9%	6%	
Sweden	85	108	-21%	3%	
Switzerland	146	168	-13%	1%	
United Kingdom	115	133	-14%	17%	

Average CO2 versus Target (95g Target converted from NEDC to WLTP)



ROAD 2 ZERO DASHBOARD

CO2 Europa
Flottenmarkt
Timewarp 2019

Countries

Report Month

Januar 2019

Month

YTD

Fuel type

(Alle)

Segment

(Alle)

Country: Austria+

Channel: Alle

Brand: Alle

Last Refresh Date:

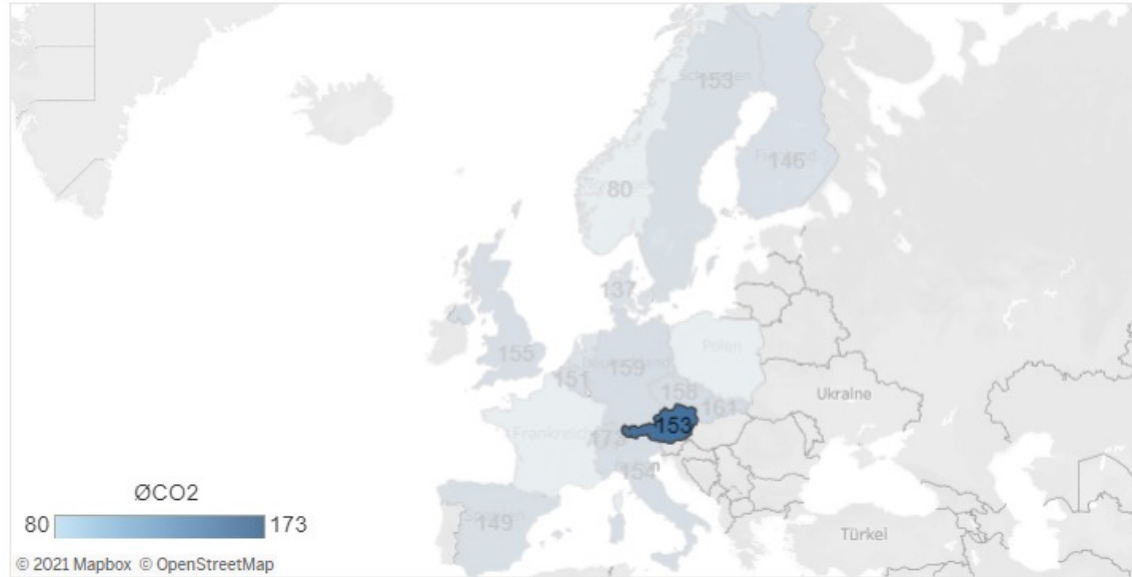
19.09.2021 12:21:07

DATAFORCE

Top 20 Brands
(ranked by New Regs)

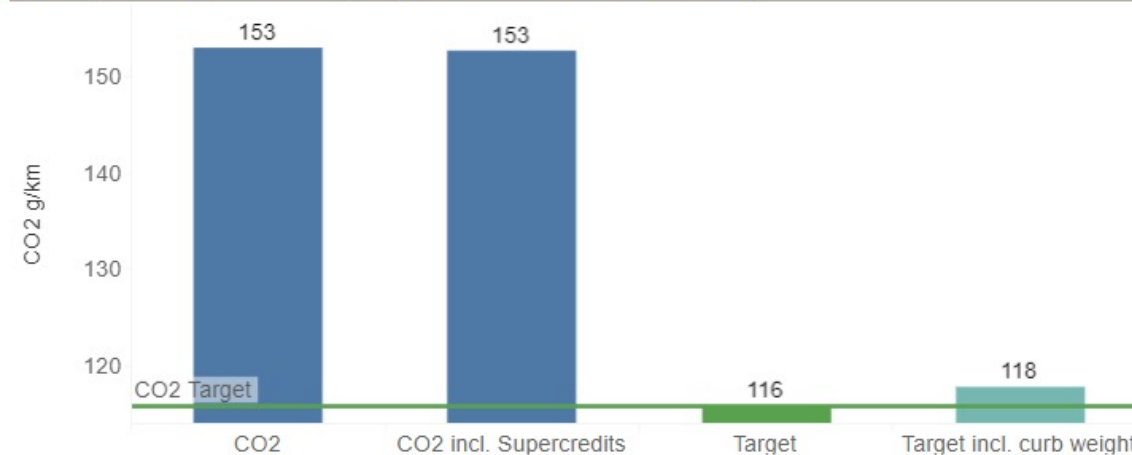


Average CO2 per Country



© 2021 Mapbox © OpenStreetMap

Average CO2 versus Target (95g Target converted from NEDC to WLTP)



Channel Share
(New Regs)

Private
28%

True Fleets
43%

Average CO2 Emission

153

Average CO2 Reduction

Country with lowest ØCO2

Norway

80

Country with highest ØCO2

Switzerland

173

Average CO2 Development per Country

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total	ØCO2 over time
Total	153				
Austria+	153			2%	
Belgium	151			5%	
Czech Republic	158			2%	
Denmark	137			2%	
Finland	146			1%	
France	151			14%	
Germany	159			24%	
Italy	154			15%	
Netherlands	133			4%	
Norway	80			1%	
Poland	154			4%	
Slovakia	161			1%	
Spain	149			9%	
Sweden	153			2%	
Switzerland	173			2%	
United Kingdom	155			14%	

ROAD 2 ZERO DASHBOARD

CO2 Austria Flottenmarkt

Countries

Report Month: August 2021
 Month: YTD
 Fuel type: (Alle)
 Segment: (Alle)

Country: Austria+
 Channel: True Fleets
 Brand: Alle

Last Refresh Date: 19.09.2021 12:21:07
DATAFORCE

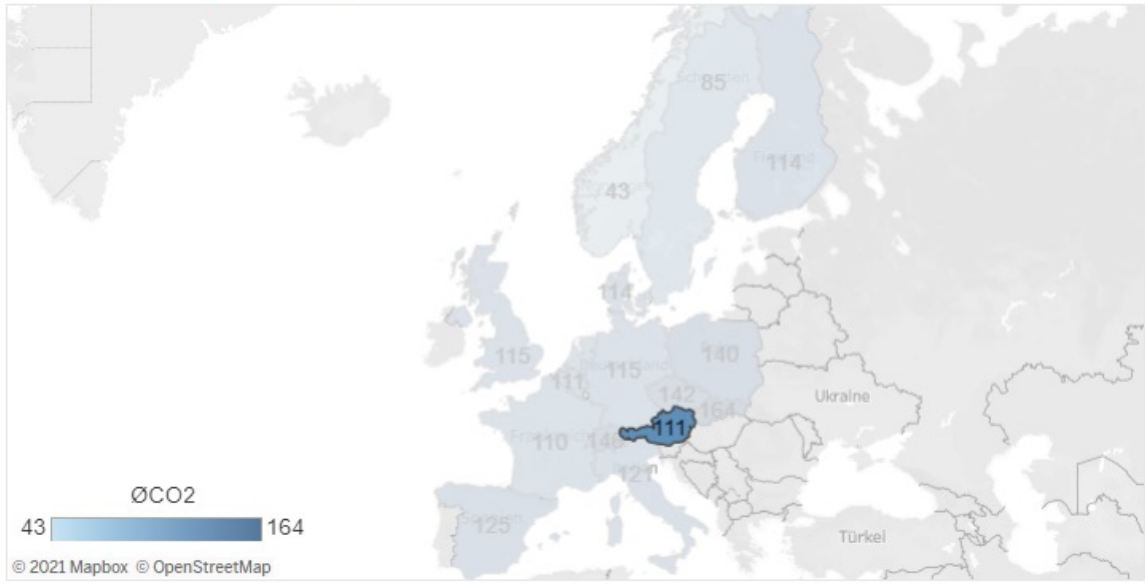
Top 20 Brands (ranked by New Regs)



Channel Share (New Regs)



Average CO2 per Country



Average CO2 Emission

111

Average CO2 Reduction

-28

Country with lowest ØCO2

Norway 43

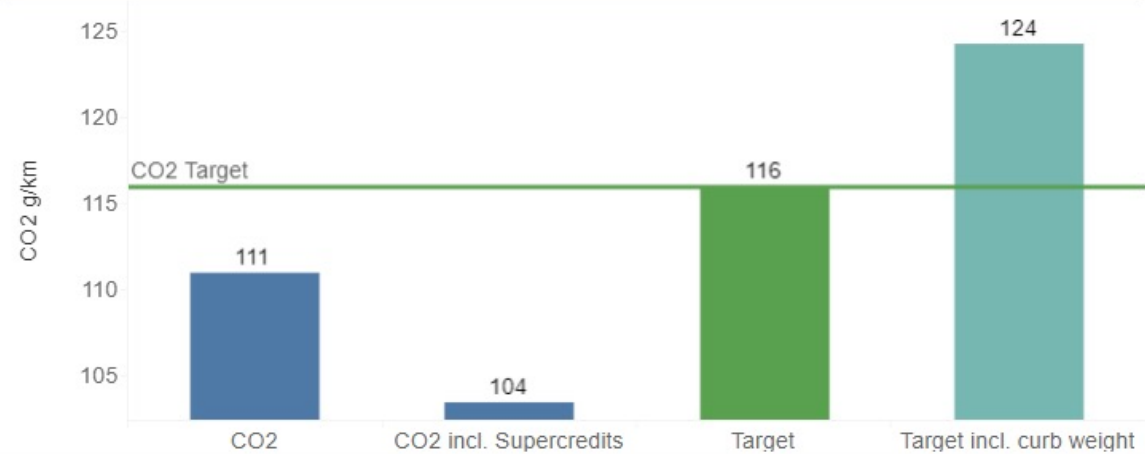
Country with highest ØCO2

Slovakia 164

Average CO2 Development per Country

	ØCO2 Current Year	ØCO2 Previous Year	ØCO2 Δ%PY	New Regs Share of Total	ØCO2 over time
Total	116	138	-16%		
Austria+	111	139	-20%	3%	
Belgium	111	129	-14%	5%	
Czech Republic	142	150	-5%	3%	
Denmark	114	133	-14%	2%	
Finland	114	137	-17%	1%	
France	110	122	-10%	13%	
Germany	115	145	-21%	22%	
Italy	121	172	-30%	10%	
Netherlands	105	117	-10%	4%	
Norway	43	65	-34%	1%	
Poland	140	147	-5%	7%	
Slovakia	164	159	3%	1%	
Spain	125	137	-9%	6%	
Sweden	85	108	-21%	3%	
Switzerland	146	168	-13%	1%	
United Kingdom	115	133	-14%	17%	

Average CO2 versus Target (95g Target converted from NEDC to WLTP)



Fragen?

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