

Overview of Autogas market in Europe

Samuel Maubanc
General Manager

AEGPL – European LPG Association

samuel.maubanc@aegpl.be

www.aegpl.be

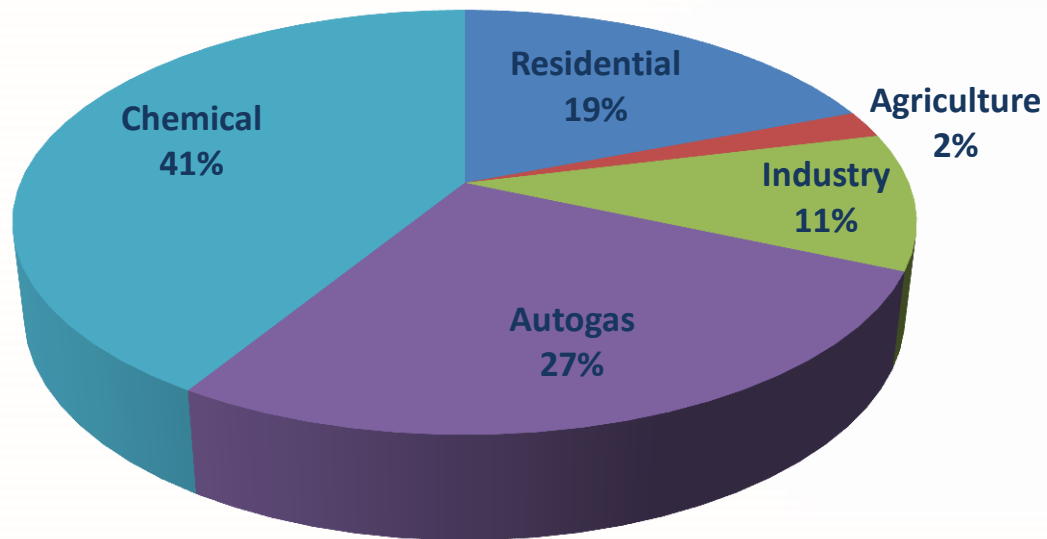
AIGLP Congress

Buenos Aires, March 30th, 2017



Market segmentation in Europe

Total LPG demand in 2015
= 37 million tonnes



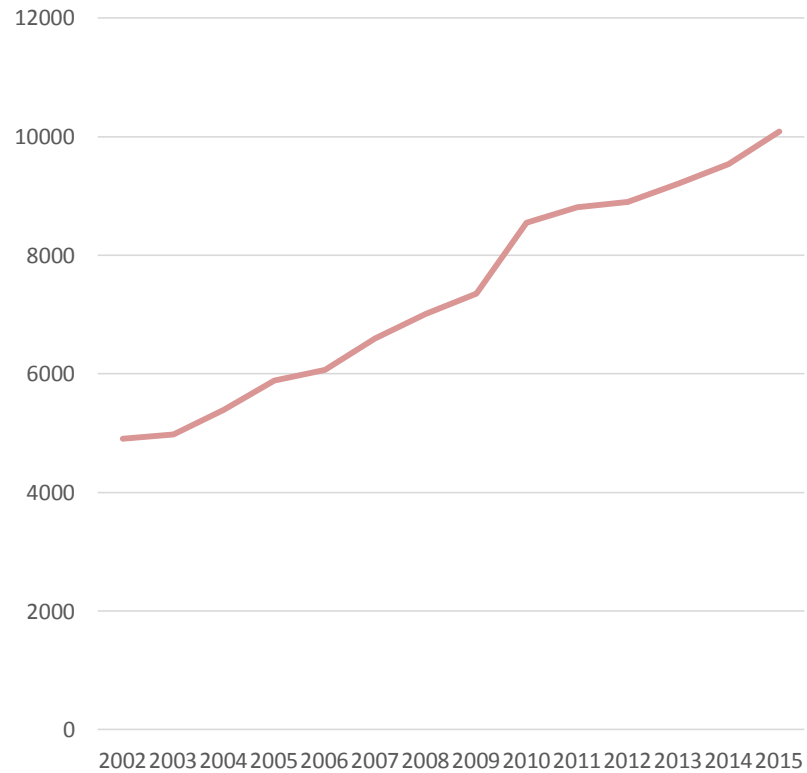
Top-10 Autogas markets in Europe (in volume)

1. Turkey
2. Poland
3. Italy
4. Ukraine
5. Germany
6. Bulgaria
7. Romania
8. Serbia
9. Greece
10. Netherlands

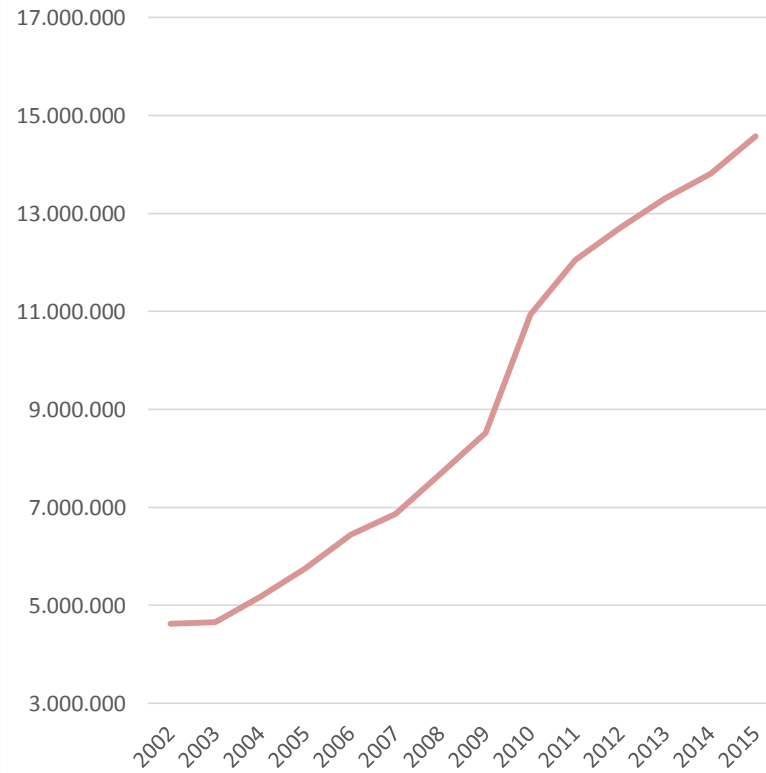
EU 28 + Turkey, Ukraine, Norway, Switzerland, Serbia and Bosnia Herzegovina

15 years of steady growth

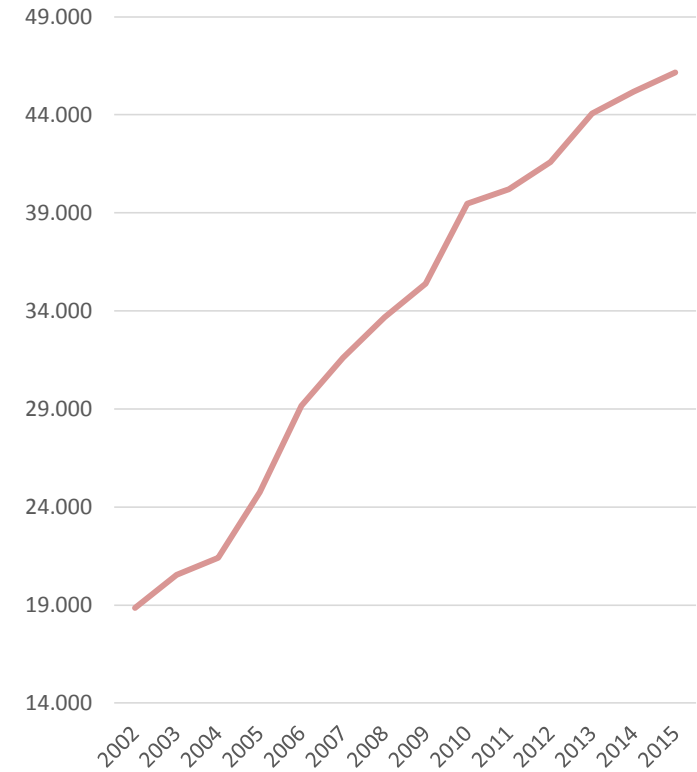
Volumes



Vehicles



Stations

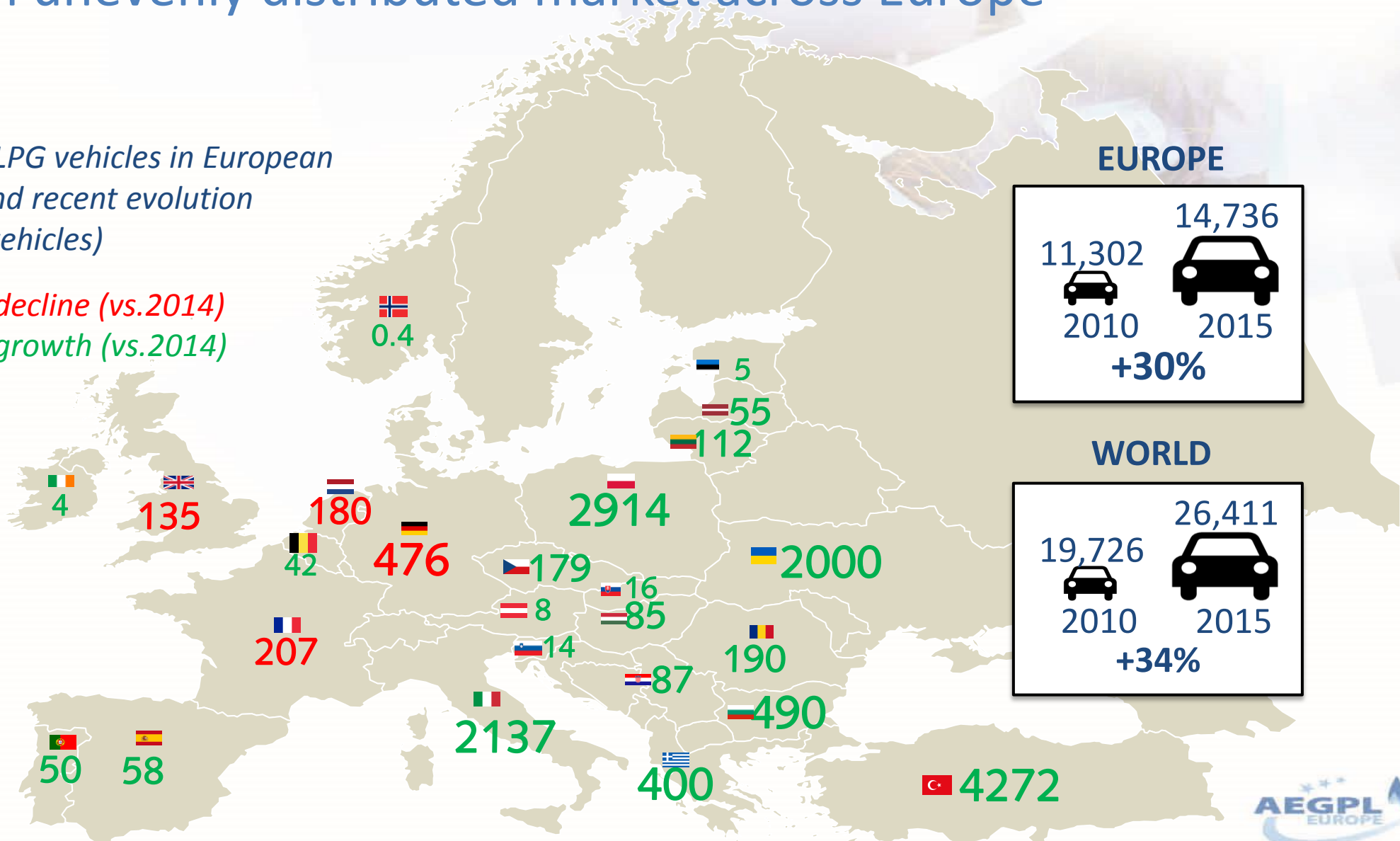


An unevenly distributed market across Europe

Number of LPG vehicles in European countries and recent evolution (thousand vehicles)

Markets in decline (vs.2014)

Markets in growth (vs.2014)



Figures are expressed in thousand vehicles, 2015 data



Key factors driving LPG demand in Europe

The early days: getting the Autogas market started in the 1980's

Oil prices skyrocketed.
Consumers were
looking for cheaper
alternatives

Oil Shocks



Infrastructure got
started by oil companies
interested in creating a
new LPG segment

**European
Oil Majors**



Starting awareness of
GHG issue resulted in
early support from
governments

**Climate
Change**

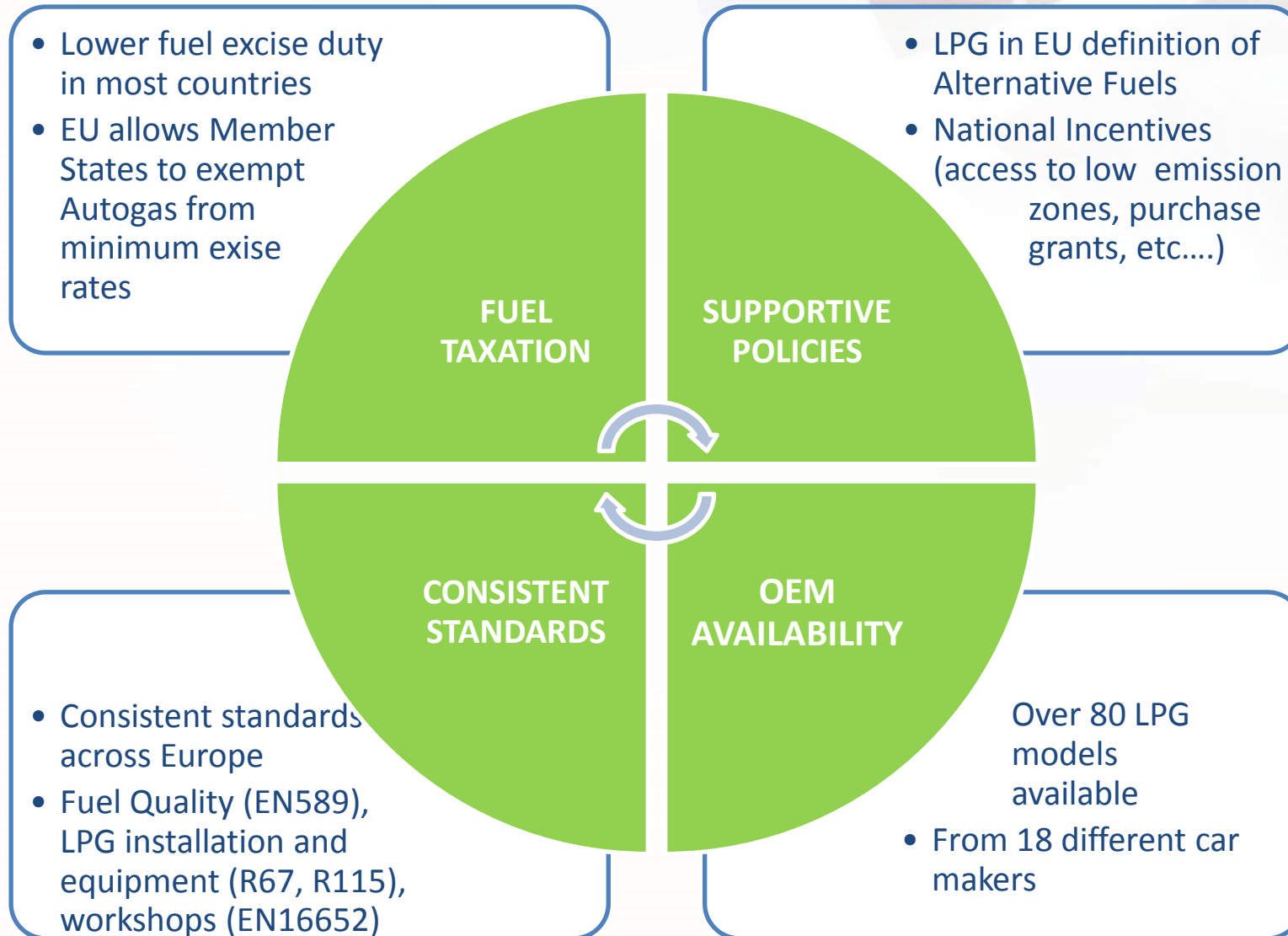


No OEMs available,
market started with
conversions (of varying
quality though)

**Conversions
Only**



What is now driving autogas growth?



What are the obstacles?



Policy push towards renewables only



Electromobility hype



European market still dominated by diesel



Perception issues remain





What winning cards up our sleeves?

40p
1
The essential daily briefing
FROM THE INDEPENDENT
WEDNESDAY 23 SEPTEMBER 2015

Toxic scandal on our roads

Millions may be driving UK vehicles that breach pollution targets

- Transport Secretary demands EU-wide inquiry into car industry
- VW sorry after world's largest car-maker is caught rigging tests

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Entrepreneur hikes cost of life-saving drug by 5,500%

THE TIMES

Wednesday September 23 2015 | thetimes.co.uk | No 7170

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Volkswagen in meltdown after faked diesel tests

rivers face mass recall as share price crashes

He added "Public confidence is vital". The commission said that it was waiting for the outcome of an investigation by the German government into VW and some of the country's other manufacturers. It confirmed, however, that it would reform the EU emission testing regime early next year. "VW has announced that it is to set aside €5.5 billion to correct the

FINANCIAL TIMES

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Volkswagen emission test cheating rocks Europe's car manufacturers

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WE'RE FUMING

Pollution tests on cars in UK

Les Echos

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Volkswagen: enquête sur les origines d'un désastre

Retour sur l'épopée américaine qui a fait chuter le leader mondial.

La banque du groupe allemand dans la tempête.

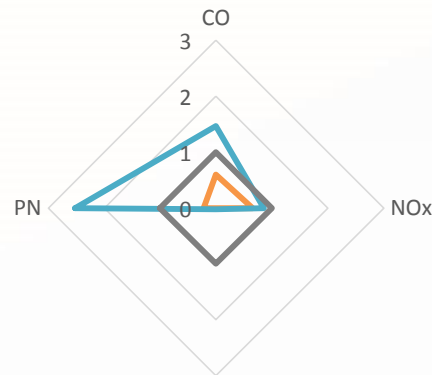
Our response to the post-dieselgate environment: LPG real-driving emission tests

- ✓ Series of tests run jointly by AEGPL + the French and German LPG associations
- ✓ Use of Portable Emission Measurement Systems, based on state-of-the-art test procedures, RDE and WLTP, to become mandatory in the EU in September 2017
- ✓ 6 vehicles tested (LPG vs gasoline and diesel)
- ✓ Series of 3 tests (80kms on public roads) for each type of fuel and car
- ✓ Measure simultaneously a number of GHG and pollutants: CO₂, CO, NO_x, HC, particle number

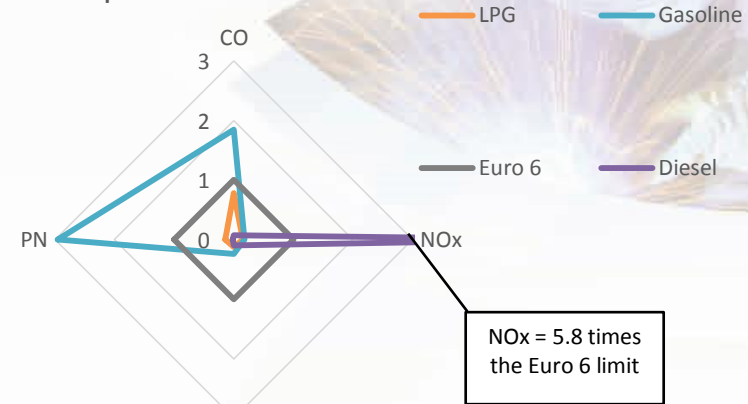


Results overview vs. Euro 6 limits

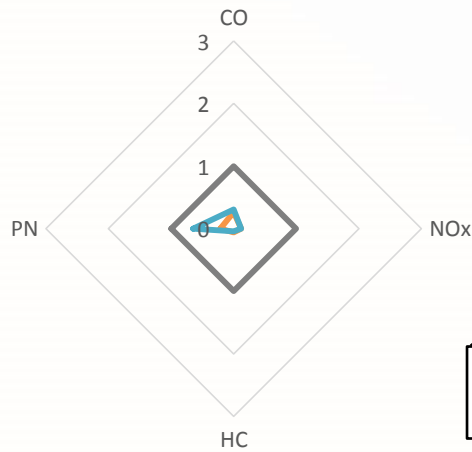
Alfa Romeo Mito



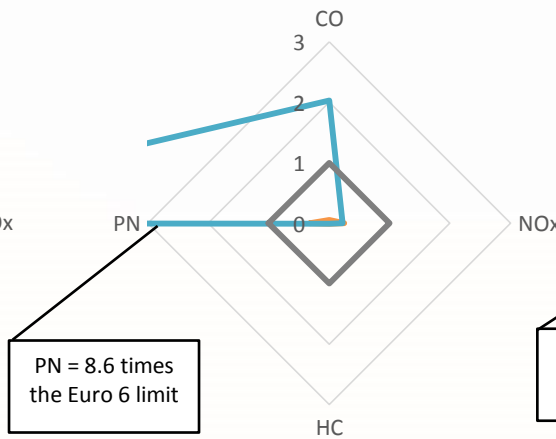
Opel Astra



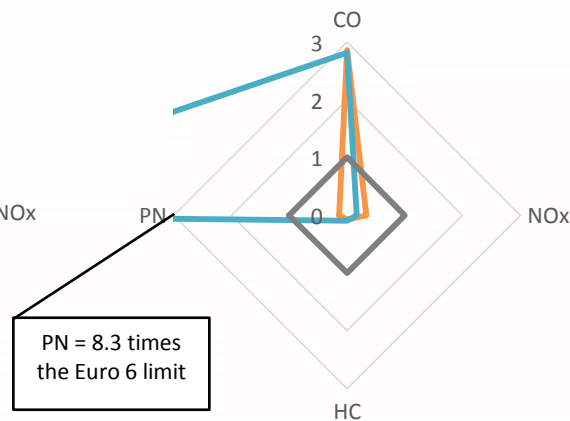
Skoda Octavia



Fiat 500L



Kia Sportage



Key takeaways from our European RDE tests

Average results for the Autogas vehicle compared to gasoline

CO2	CO	NOx	HC	PN
-13%	-45%	Similarly low	Similarly low	-90%

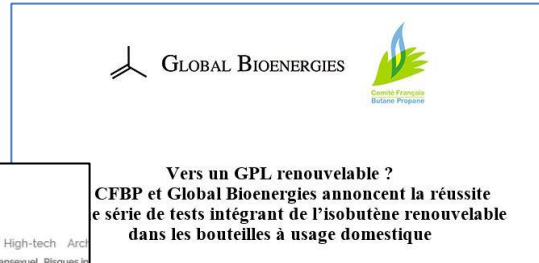
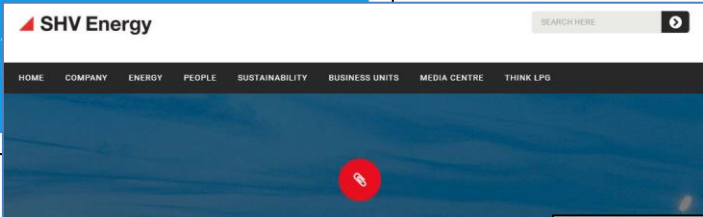
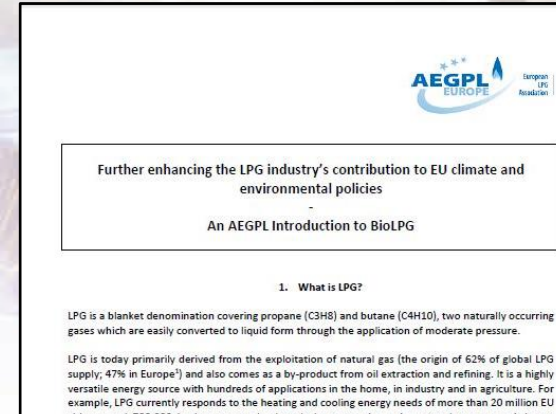
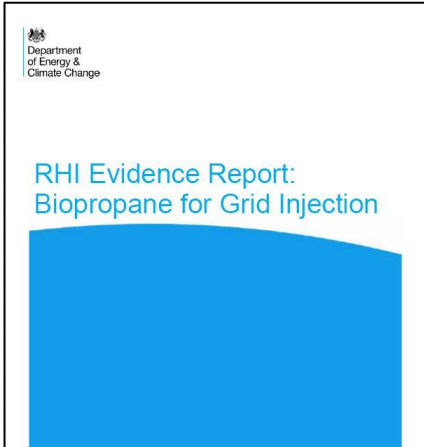
Autogas vehicles, even older converted cars, bring significant reductions in particles and CO2 emissions when compared to gasoline

Similar emission profile as modern diesel (i.e. low on CO2 and several pollutants) but -98% NOx emissions!!

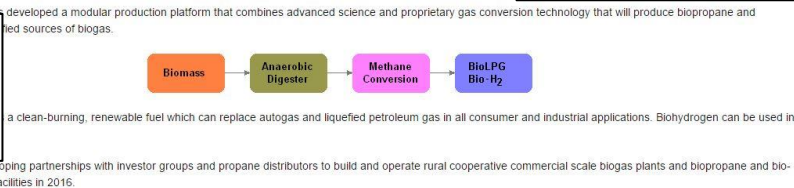
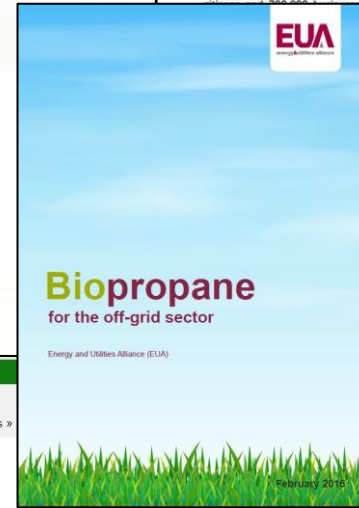
→ Will contribute to nurture/renew interest in LPG from car manufacturers and policy makers

Biopropane is becoming a commercial reality in Europe

- Several major announcements from the industry in the last months
- Critical for maintaining authorities' interest to support LPG
- AEGPL and European industry at large stepping up effort to integrate in our advocacy strategy



4 septembre 2015 – Le Comité d'organisation professionnelle de Biogaz, Butagaz®, Finagaz®, Prt, et d'autre part Global Bi...



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