

Focus on European's autogas market

Joel PEDESSAC

WLPGa's GAIN - Chairman

AEGPL (European LPG Association) - board member

CFBP (France LPG association) - general manager

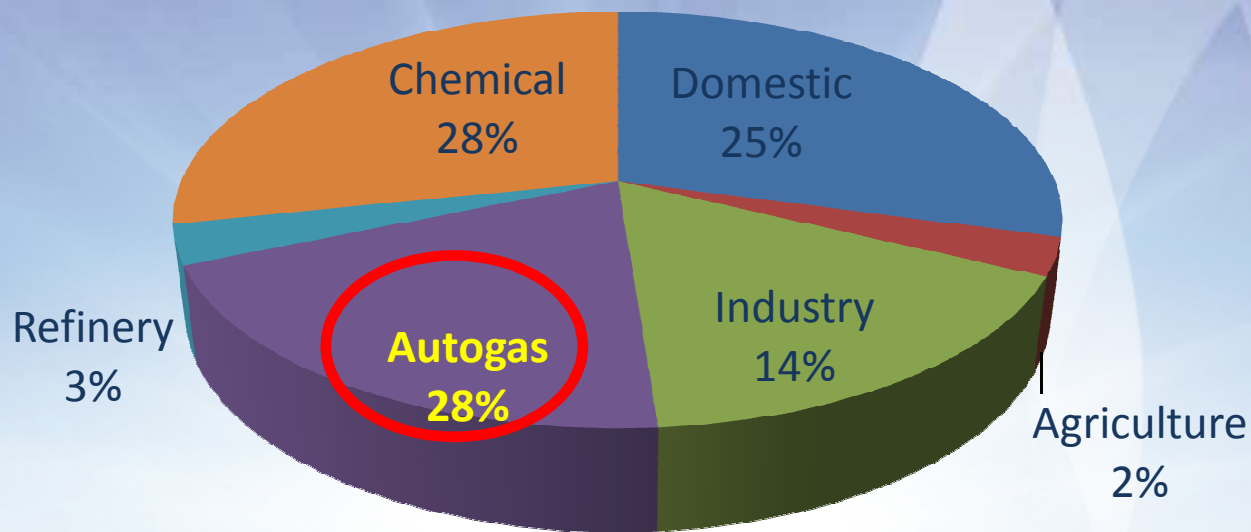
Asia Autogas Summit

Hong Kong - December 3rd 2012



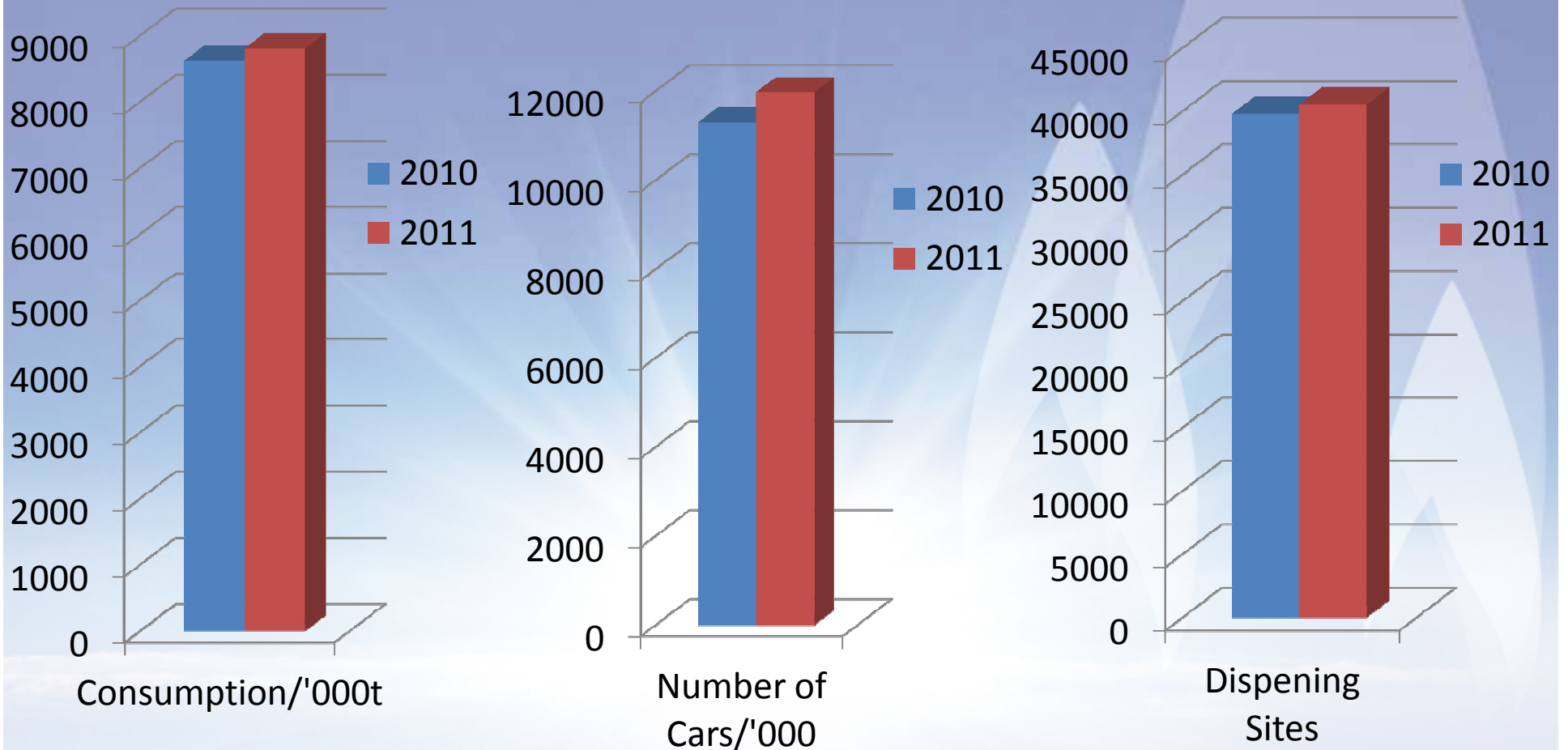
Autogas share of total LPG market in Europe (EU 27 + 6)

Total LPG demand in 2011
= 30, 8 million tonnes

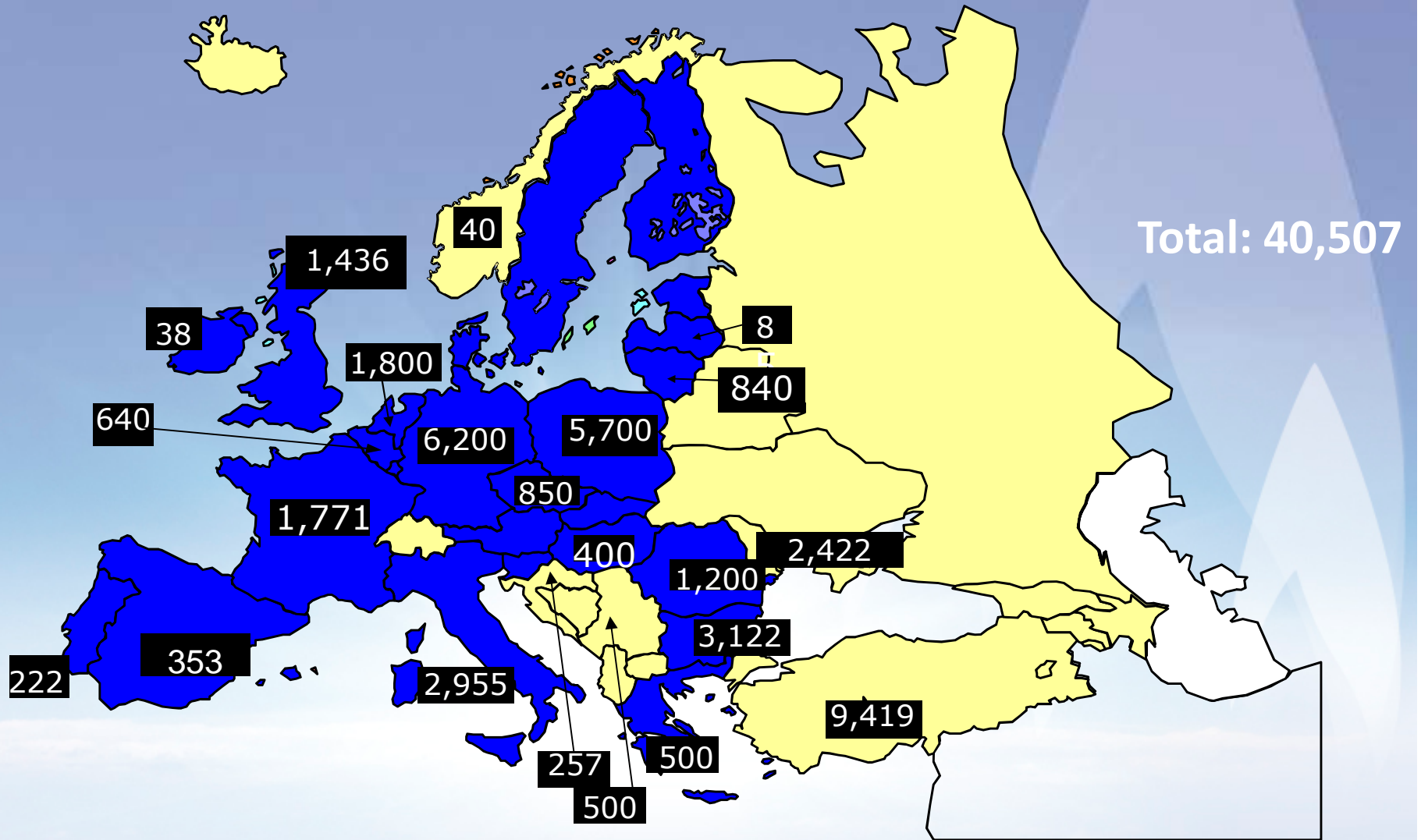


Latest trends in the European Autogas Market

Average consumption per site = 210 t/y



Autogas Infrastructure



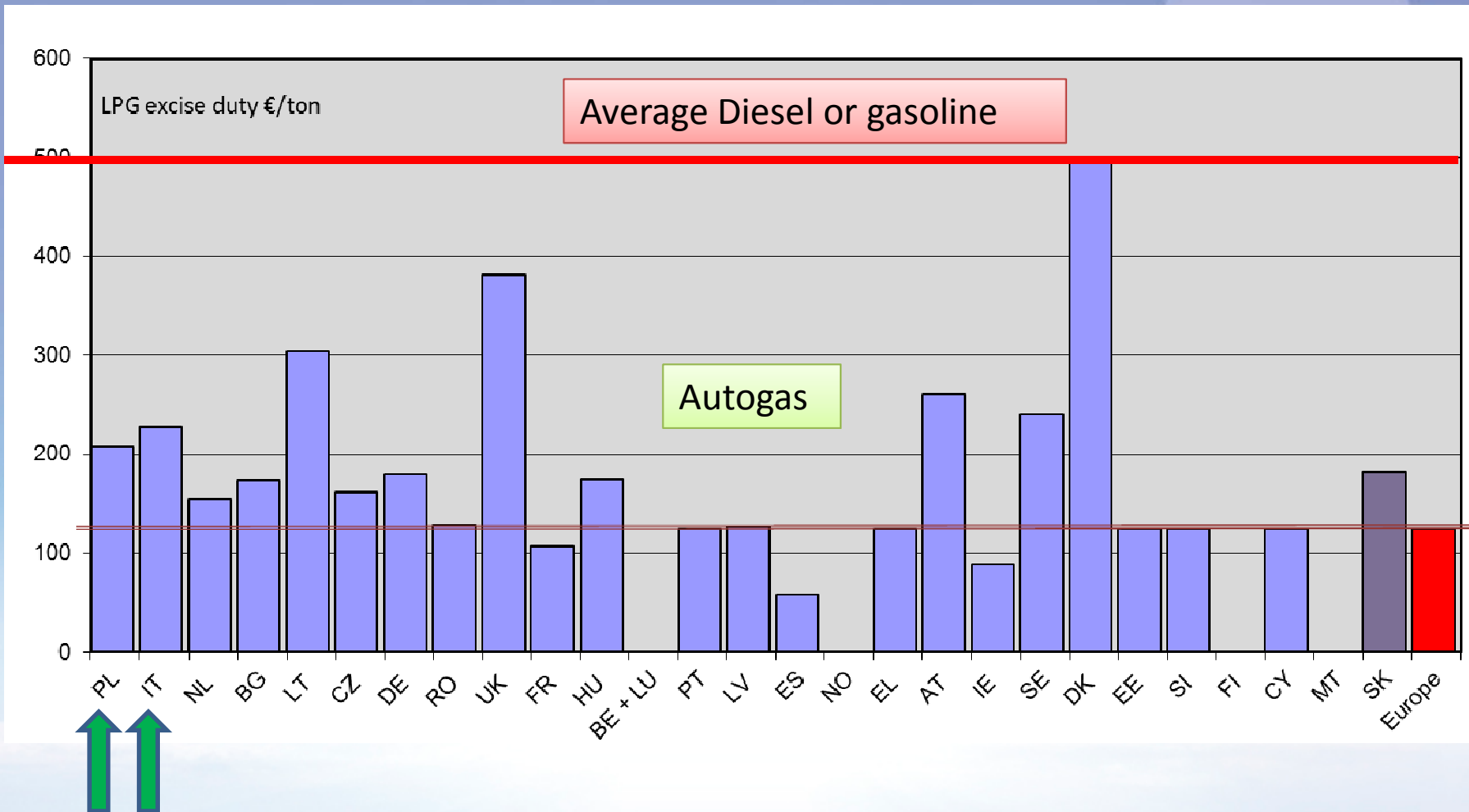
Source: European LPG Sector Overview Argus/AEGPL
2012

Autogas Consumption: Major European Markets

Country	2010	2011	% Change
France	216	229	+6
Germany	507	505	0
Italy	1,219	1,268	+4
Poland	1,660	1,610	-3
Turkey	2,489	2,642	+6
Ukraine	728	749	+3

TREND: Most countries are experiencing slow but real growth

Excise duties by country (€/t)



A closer look at national specificities 1/2 – Italy

➤ Continued Growth in 2011:

- + 4% autogas sales
- + 35,000 new cars compared to 2010

Explanatory elements:

- Lower excise than diesel and petrol
- Strong involvement of LPG cars and kits makers
- Targeted and periodic grants for LPG cars



A closer look at national specificities 2/2 – Poland

➤ A solid but somewhat stagnant market:

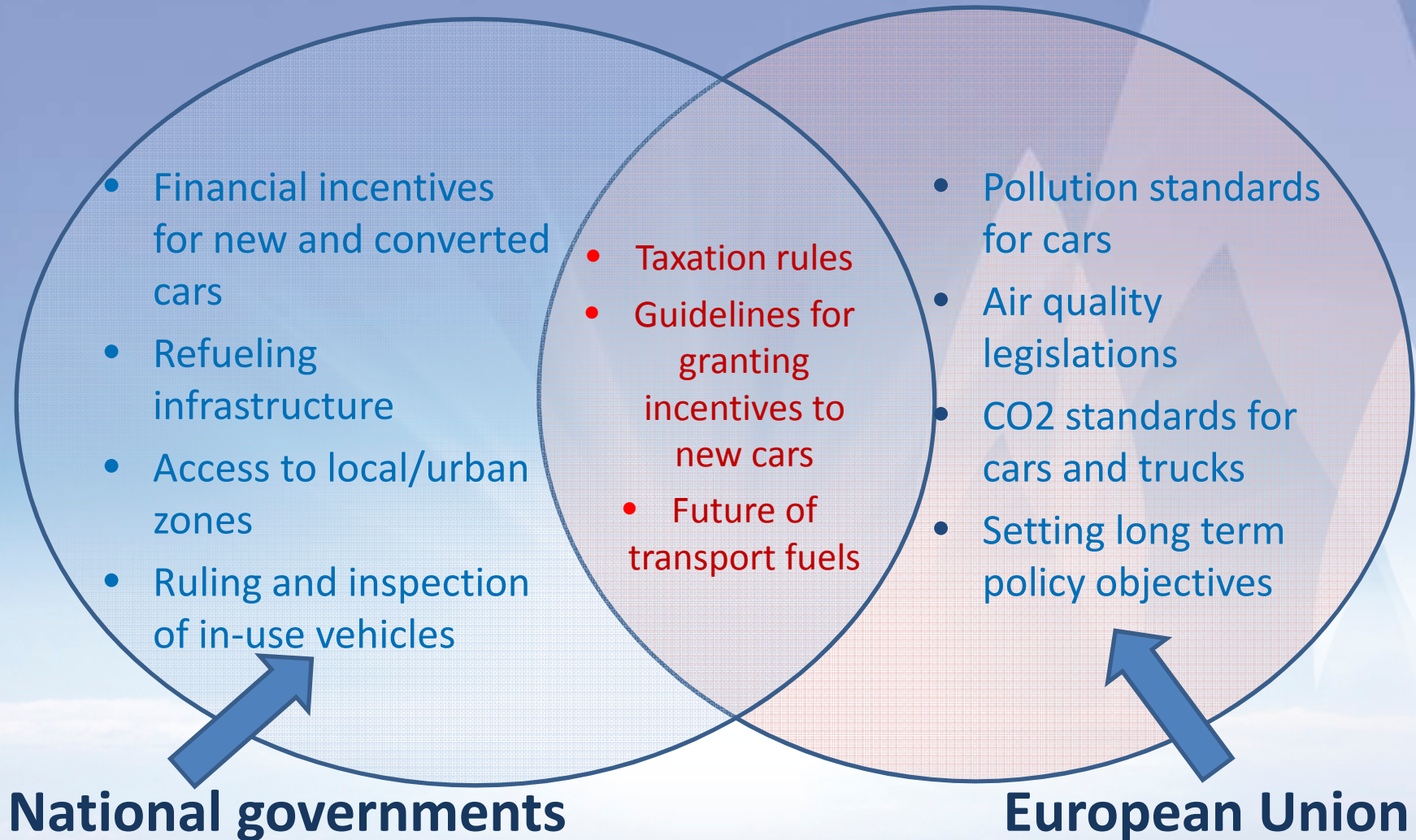
- Total of 2,477,000 millions LPG cars
- 152,000 new cars but slightly reduced consumption (1.66 to 1.61 m tonnes)
- Autogas represents 75% of Polish LPG demand

Explanatory elements:

- Few diesel vehicles
- Long-established public acceptance of LPG
- Dynamic LPG retrofitting and OEM markets



Distribution of policy-making powers in the EU



Autogas and Europe's Challenges

- **Climate Change:** Lower carbon alternative to conventional fuels
- **Pollution and human health:** Gaseous fuels mean low emissions
- **Security of supply:** Flexible transport, multiple sources, and robust prospects as regards availability
- **Competitiveness:** European companies are among world leaders in Autogas and associated technology
- **Affordable green:** Citizens are attracted to blend of economy and ecology

Projected benefits for society if autogas reaches 10% of EU fuel market share in 2020

- 350 million tonnes of avoided CO2 emissions
- €20 billion saved on external costs (mainly health related)
- €41 billion saved for individual motorists
- €7 billion to Europe's balance of payments
- A diversified and more secure energy mix
- Greener and more competitive automotive industry

EUROPEAN LPG ASSOCIATION

Autogas in Europe, The Sustainable Alternative

An LPG Industry Roadmap

THANK YOU!



LPG

EXCEPTIONAL
ENERGY



j.pedessac@cfbp.fr

For more information: www.aegpl.eu

