EUROVIGENTTE ROUNDTABLE

30 June 2026

Thomas Fabian

Chief Commercial Vehicles Officer

WHO WE REPRESENT

MEMBERS	BMW GROUP	DAF	DAIMLER TRUCK		Ford
HONDA	HYUNDAI	IVECO • GROUP	JLR		NISSAN
Renault Group	STELLANTIS	TOYOTA	TRATON	VOLKSWAGEN GROUP	VOLVO

THREE KEYS TO ZERO-EMISSION ROAD TRANSPORT

Commitment to **climate-neutrality by 2050 at the latest**

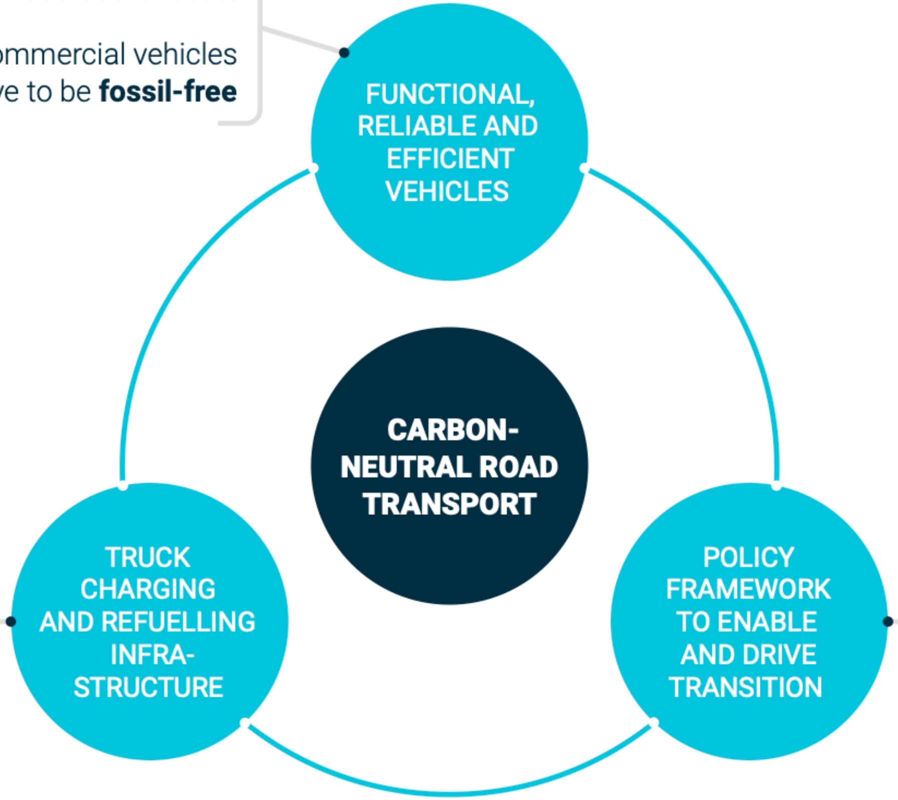
By 2040 all new commercial vehicles sold will have to be **fossil-free**

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

Manufacturers 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 shift key cost factors**

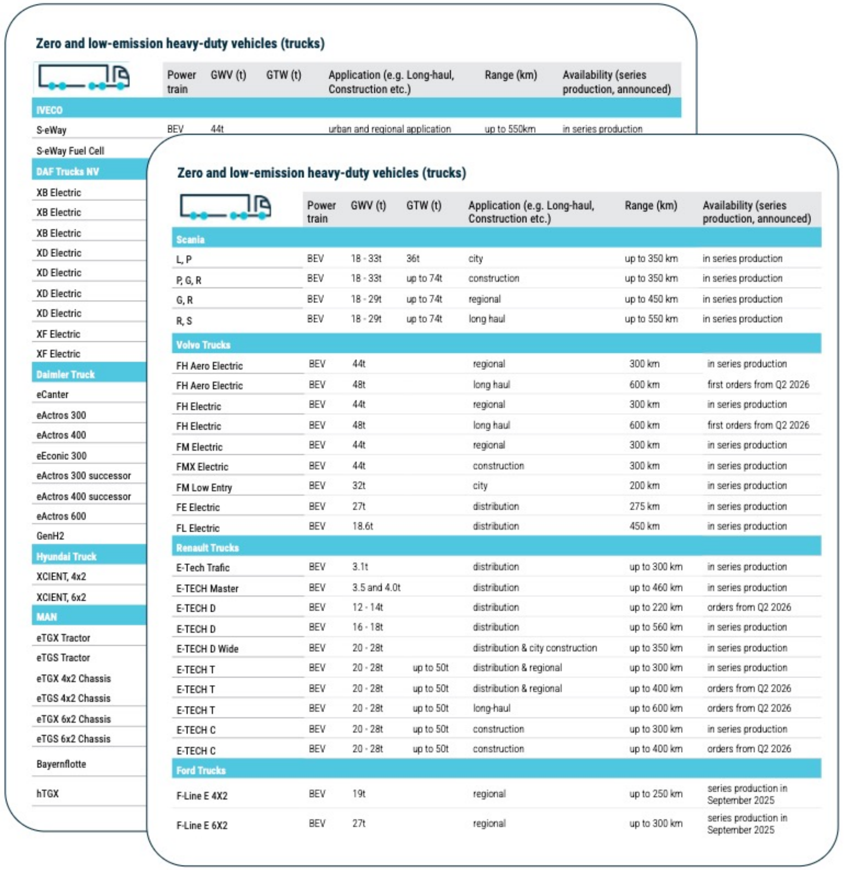
In line with science, an **ambitious carbon price**, which gradually increases to significantly higher levels than today is crucial to drive the deployment of zero-emission technologies

Decarbonisation requires **clear focus and all resources to be devoted exclusively** to reaching target as soon as possible

DRIVING EUROPE’S GREEN TRANSITION WITH ZERO-EMISSION TRUCKS AND BUSES

- **Europe’s truck and bus manufacturers are leading road transport’s transition** to climate neutrality by introducing state-of-the-art zero--emission vehicles.
- **45+ zero-emission truck models now available** – from city deliveries to long-haul transport.
- **20+ zero-emission bus models on the market** – powering clean, quiet mobility in cities & beyond.

Source: https://www.acea.auto/news/driving-europes-green-transition-with-zero-emission-trucks-and-buses/



Zero and low-emission heavy-duty vehicles (trucks)

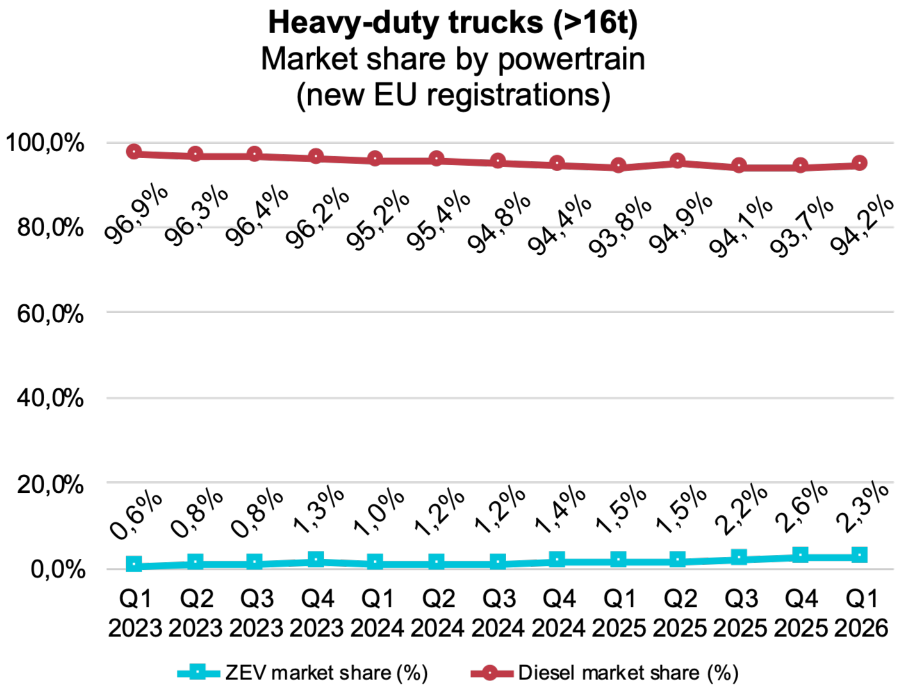
	Power train	GWV (t)	GTW (t)	Application (e.g. Long-haul, Construction etc.)	Range (km)	Availability (series production, announced)
IVECO						
S-eWay	BEV	44t		urban and regional application	up to 550km	in series production
S-eWay Fuel Cell						
DAF Trucks NV						
XB Electric						
XB Electric						
XB Electric						
XD Electric						
XD Electric						
XD Electric						
XD Electric						
XF Electric						
XF Electric						
Daimler Truck						
eCanter						
eActros 300						
eActros 400						
eEconic 300						
eActros 300 successor						
eActros 400 successor						
eActros 600						
GenH2						
Hyundai Truck						
XCIENT, 4x2						
XCIENT, 6x2						
MAN						
eTGX Tractor						
eTGS Tractor						
eTGX 4x2 Chassis						
eTGS 4x2 Chassis						
eTGX 6x2 Chassis						
eTGS 6x2 Chassis						
Bayernflotte						
hTGX						

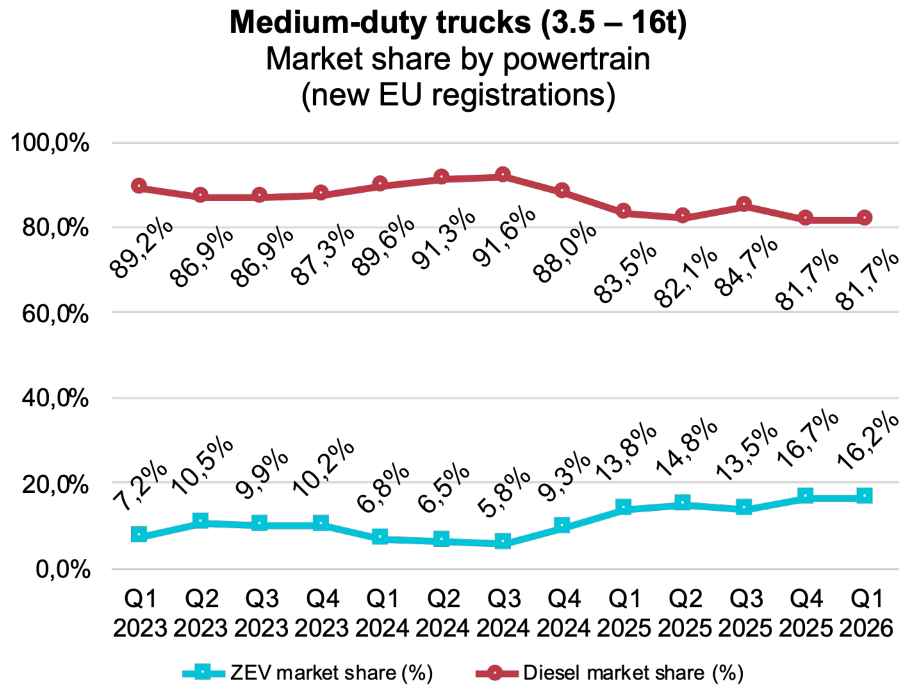
Zero and low-emission heavy-duty vehicles (trucks)

	Power train	GWV (t)	GTW (t)	Application (e.g. Long-haul, Construction etc.)	Range (km)	Availability (series production, announced)
Scania						
L, P	BEV	18 - 33t	36t	city	up to 350 km	in series production
P, G, R	BEV	18 - 33t	up to 74t	construction	up to 350 km	in series production
G, R	BEV	18 - 29t	up to 74t	regional	up to 450 km	in series production
R, S	BEV	18 - 29t	up to 74t	long haul	up to 550 km	in series production
Volvo Trucks						
FH Aero Electric	BEV	44t		regional	300 km	in series production
FH Aero Electric	BEV	48t		long haul	600 km	first orders from Q2 2026
FH Electric	BEV	44t		regional	300 km	in series production
FH Electric	BEV	48t		long haul	600 km	first orders from Q2 2026
FM Electric	BEV	44t		regional	300 km	in series production
FMX Electric	BEV	44t		construction	300 km	in series production
FM Low Entry	BEV	32t		city	200 km	in series production
FE Electric	BEV	27t		distribution	275 km	in series production
FL Electric	BEV	18.6t		distribution	450 km	in series production
Renault Trucks						
E-Tech Trafic	BEV	3.1t		distribution	up to 300 km	in series production
E-TECH Master	BEV	3.5 and 4.0t		distribution	up to 460 km	in series production
E-TECH D	BEV	12 - 14t		distribution	up to 220 km	orders from Q2 2026
E-TECH D	BEV	16 - 18t		distribution	up to 560 km	in series production
E-TECH D Wide	BEV	20 - 28t		distribution & city construction	up to 350 km	in series production
E-TECH T	BEV	20 - 28t	up to 50t	distribution & regional	up to 300 km	in series production
E-TECH T	BEV	20 - 28t	up to 50t	distribution & regional	up to 400 km	orders from Q2 2026
E-TECH T	BEV	20 - 28t	up to 50t	long-haul	up to 600 km	orders from Q2 2026
E-TECH C	BEV	20 - 28t	up to 50t	construction	up to 300 km	in series production
E-TECH C	BEV	20 - 28t	up to 50t	construction	up to 400 km	orders from Q2 2026
Ford Trucks						
F-Line E 4X2	BEV	19t		regional	up to 250 km	series production in September 2025
F-Line E 6X2	BEV	27t		regional	up to 300 km	series production in September 2025

ZEV UPTAKE: PROGRESS STILL TOO SLOW

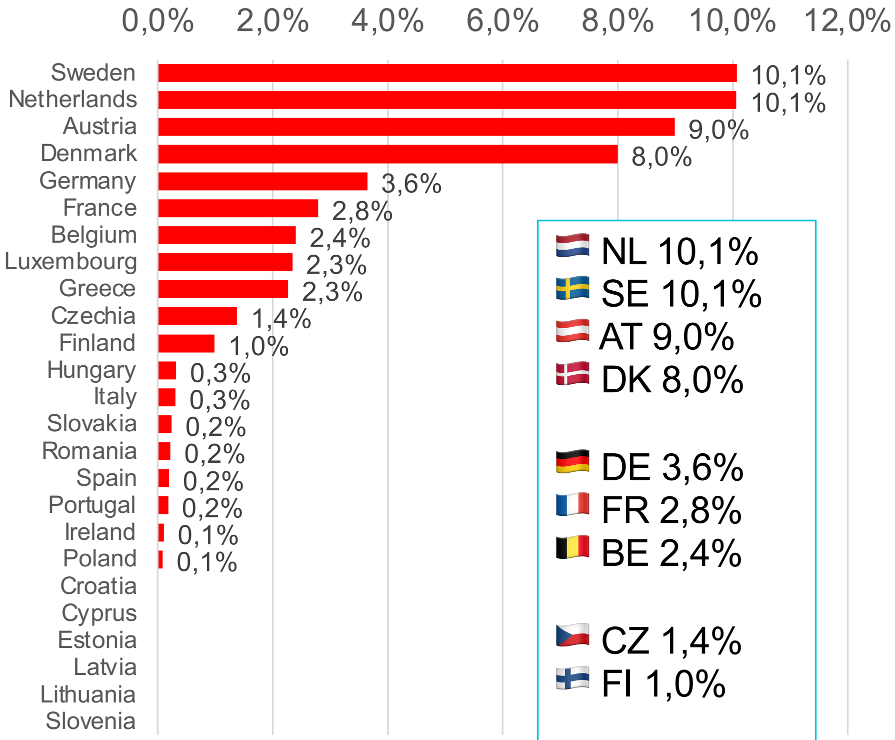
Q1 2026: 2.3% HDV, 16.2% MDV





EUROPE’S ZEV MARKET (Q1 2026)

Heavy-duty trucks (>16t)
ZEV registrations EU-27



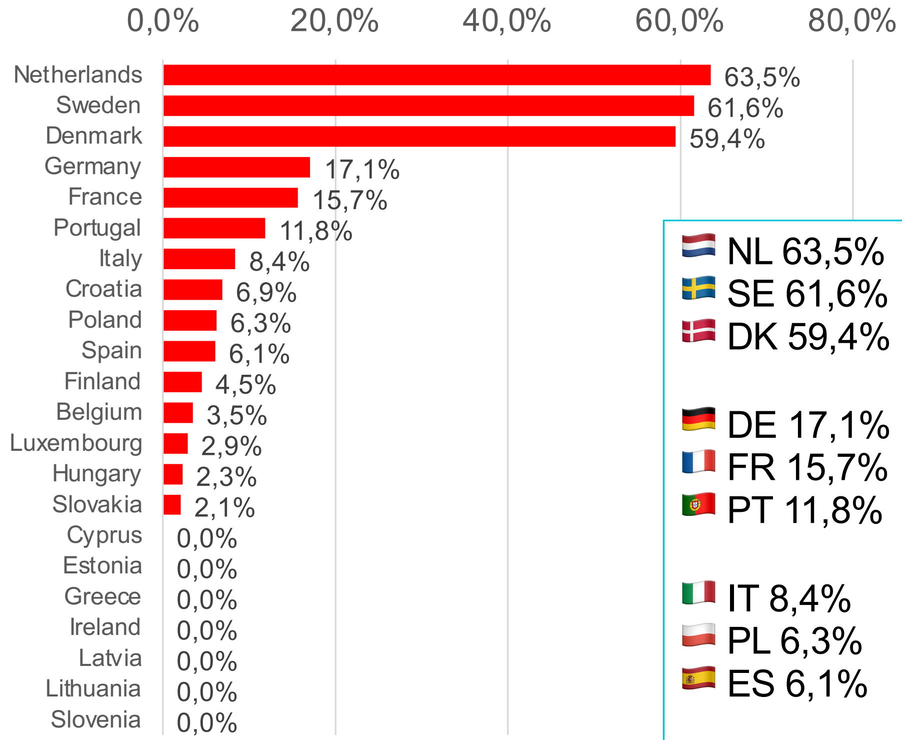
🇳🇱 NL 10,1%
🇸🇪 SE 10,1%
🇦🇹 AT 9,0%
🇩🇰 DK 8,0%

🇩🇪 DE 3,6%
🇫🇷 FR 2,8%
🇧🇪 BE 2,4%

🇨🇿 CZ 1,4%
🇫🇮 FI 1,0%

🇨🇭 CH 25,1%
🇳🇴 NO 12,4%

Medium-duty trucks (3.5 – 16t)
ZEV registrations EU-27



🇳🇱 NL 63,5%
🇸🇪 SE 61,6%
🇩🇰 DK 59,4%

🇩🇪 DE 17,1%
🇫🇷 FR 15,7%
🇵🇹 PT 11,8%

🇮🇹 IT 8,4%
🇵🇱 PL 6,3%
🇪🇸 ES 6,1%

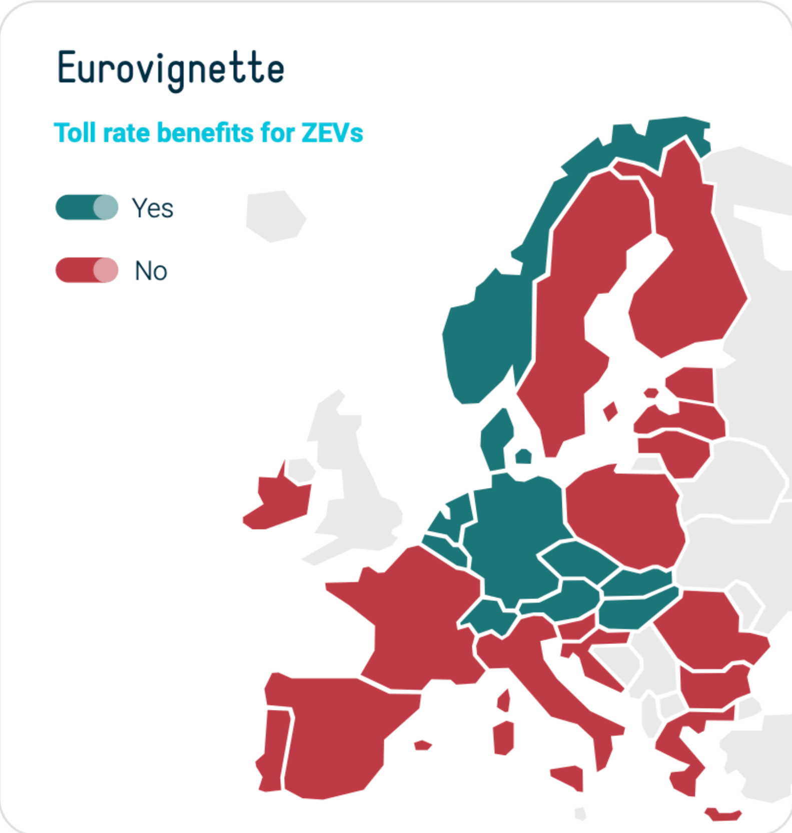
🇳🇴 NO 70,0%
🇨🇭 CH 34,1%

www.acea.auto

COST PARITY FOR ZEV IS ESSENTIAL TO UNLOCK THE TRANSITION

- **HDV road transport is a B2B market!** Achieving cost parity for zero-emission vehicles is essential to enable the transition
- Without **robust business cases** across a wide range of use cases and member states the ZEV market uptake will remain insufficient
- A wide range of policy measures are needed to support **competitive Total Cost of Ownership (TCO) for ZE HDVs**
  - CO_2-differentiated road user charges, favourable taxation for renewable fuels, hydrogen and electricity, ETS-2, competitive charging prices, vehicle-related regulations (e.g. Weights & Dimensions Directive), demand-side measures (incentives, public procurement), etc

CO2-BASED ROAD CHARGES TO ACCELERATE ZEV UPTAKE



- **CO2-based road user charges with full exemption for zero-emission vehicles** are one of the most effective, targeted measures to enable ZEV cost parity
- However, on its own it is insufficient to fully reduce the TCO gap between ZEVs and conventional vehicles
  - Only in Germany, Austria, and Switzerland discount levels are currently high enough to drive ZEV demand
- Currently, **only two member states fully exempt ZEVs** from road tolls
  - Belgium and Germany
- **Ten member states apply reduced toll rates** for ZEVs
  - Austria, Bulgaria, Czechia, Denmark, Hungary, Latvia, Luxembourg, the Netherlands, Slovakia, Sweden

REPRESENTS EUROPE'S 17 MAJOR CAR, VAN, TRUCK AND BUS MANUFACTURERS

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