Eurovignette in Action: Unlocking Zero-Emission Trucking in Europe

Tuesday, June 30, 2026 14:00–15:30 CET

Moderator

SITA HOLTSLAG

EUROPE DIRECTOR,

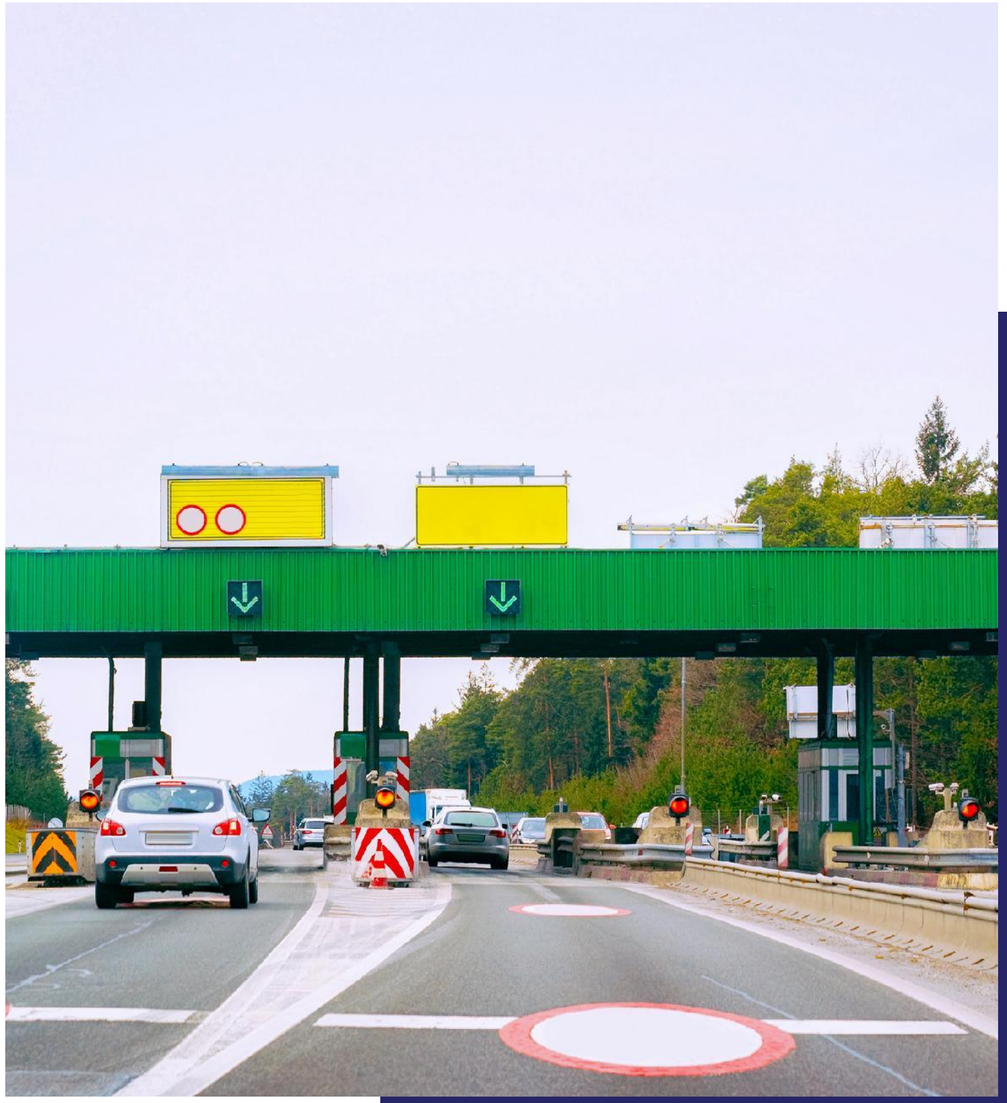
CALSTART/DRIVE TO ZERO

AGENDA

- Welcome & Framing
- Eurovignette Policy Landscape & Market Potential
- Country Perspectives: Implementation in Practice
- Industry Lightning Insights
- Transition to Breakouts & Instructions
- Breakout Discussions
- Closing & Key Takeaways

Eurovignette — Economic Context

- Fuel prices across Europe remain volatile, exposing the road transport sector—and the broader economy—to ongoing cost shocks
- Reducing dependence on imported fossil fuels is a matter of economic security



Eurovignette—An Immediate Opportunity for Action

Toll Exemptions Can:

- Reduce total cost of ownership of fleets
- Accelerate market uptake of zero-emission trucks
- Send strong signals to manufacturers and infrastructure providers

Eurovignette—Strong Industry Support

- A **coalition of 58 companies** has urged EU governments to implement toll exemptions, introduce CO2-based road charging, and reinvest revenues into a fair transition

Eurovignette Directive: Impact of road toll and CO2-based charges on TCO

Albert Alonso i Villar, Associate Researcher

30.06.2026

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- An independent nonprofit research organization since 2005
- Providing exceptional, objective, timely analysis to environmental regulators
- Empowering them to improve the environmental performance of transportation to benefit public health and mitigate climate change

The impact of the Eurovignette policy levers on Total Cost of Ownership (TCO)

Road tolls and CO2-based charges

Several EU Member States impose charges on road use, often determined by the vehicle's gross weight, axle configuration, and emissions class.

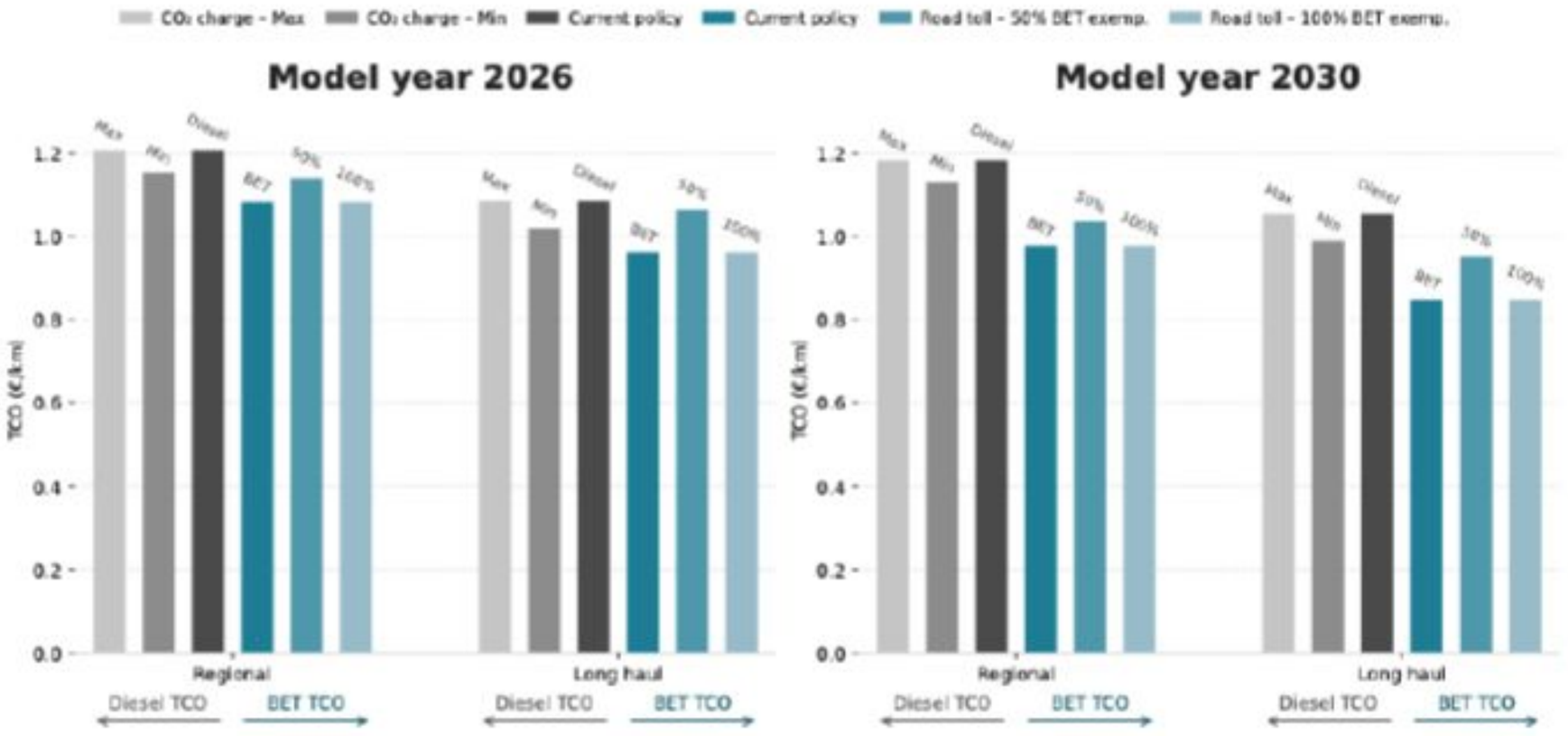
To support the transition to zero-emission logistics, the EU's Eurovignette Directive allows Member States to **vary road charges for heavy goods vehicles based on CO_2 emissions** and **grant road toll exemptions to zero-emission trucks**.

- The Directive allows Member States to grant **full toll exemptions for zero-emission** trucks until June 30, 2031, after which the maximum exemption is limited to 75%.

- **CO_2-based road charges** for trucks are calculated according to their emissions class, with typical long-haul trucks subject to charges of between €0.08/km and €0.16/km.

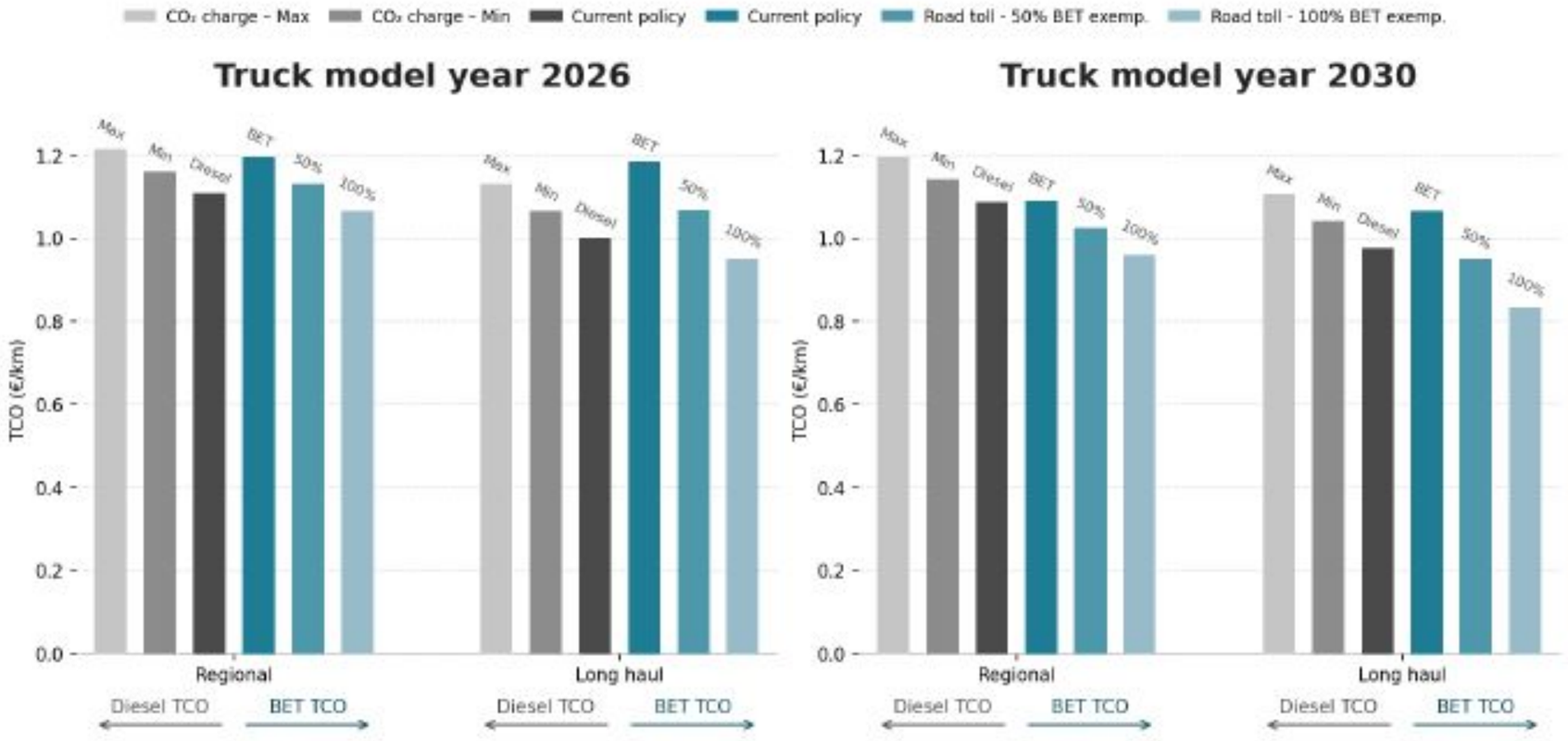
In this brief analysis, we examine the impact of road toll exemptions and CO_2-based charges on the total cost of ownership (TCO) of regional and long-haul trucks in the following major European markets: Germany, France, Italy, and Poland.

Germany



- Germany already applies the Eurovignette (full road toll exemption + CO2-based charge (0.158 EUR/km), which makes **BET's TCO cheaper than diesel across all years and segments**.
- These findings highlight the strength of Germany's existing road toll design and illustrate how CO_2-differentiated charging and ZEV incentives can substantially reduce BET operating costs.

France



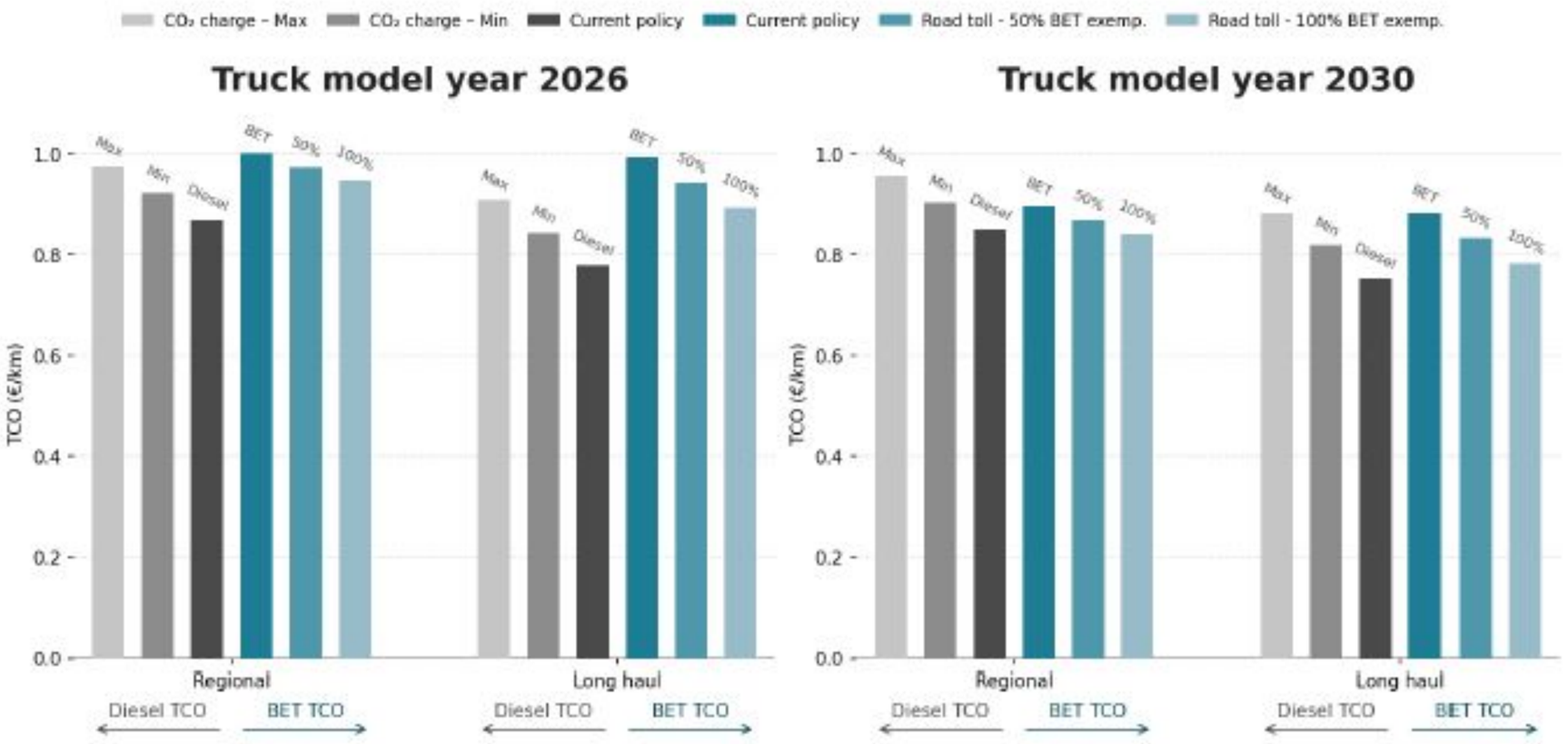
- **For regional trucks:** 100% BET road toll exemption would be enough to achieve cost parity with diesel trucks by 2026. By 2030, BETs are expected to reach cost parity even without policy support, although the Eurovignette would highly accelerate deployment.

Full Eurovignette implementation: 12.3% lower BET TCO in 2026 and 19.7% in 2030.

- **For long-haul trucks:** Full BET road toll exemptions would be required to achieve cost parity with diesel trucks for 2026 trucks, while 50% exemption would be enough by model year 2030.

Full Eurovignette implementation: 15.8% lower BET TCO in 2026 and 24.5% in 2030.

Italy



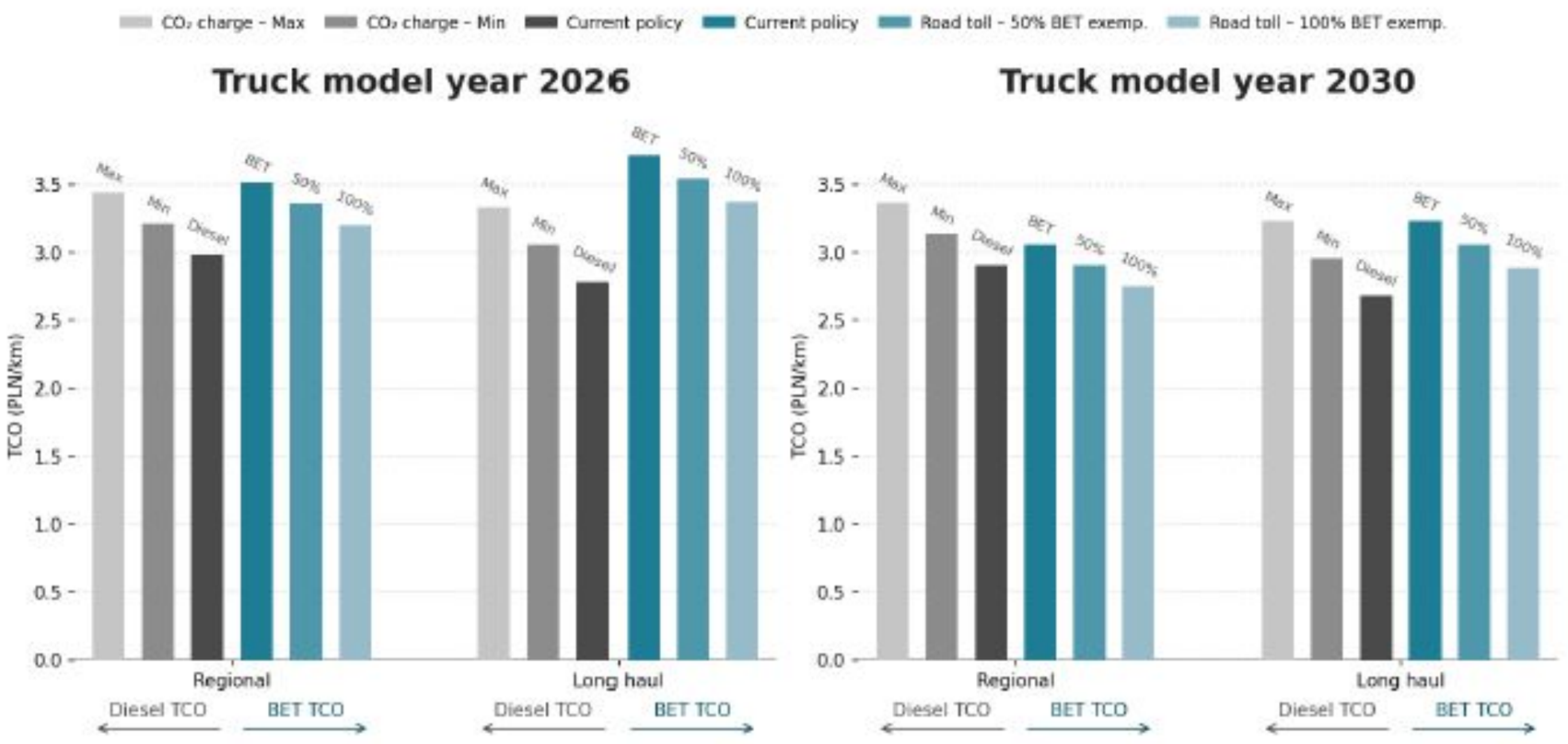
- **For regional trucks:** 100% BET road toll exemption and maximum CO2-based charges would be required to achieve cost parity in 2026. By 2030, 100% road toll exemptions alone would be sufficient to achieve cost parity.

Full Eurovignette implementation: 3.1% lower BET TCO in 2026 and 12.2% in 2030.

- **For long-haul trucks:** Full BET road toll exemptions would be reduce the TCO gap with diesel trucks from 27.4% to14.6% in 2026, and from 17.1% to 3.8% in 2030.

Full Eurovignette implementation: 1.7% lower BET TCO in 2026 and 11.4% in 2030.

Poland



- **For regional trucks:** 100% BET road toll exemption and maximum CO2-based charges would be required to achieve cost parity in 2026. By 2030, 50% road toll exemptions alone would be sufficient to achieve cost parity.

Full Eurovignette implementation: 6.9% lower BET TCO in 2026 and 18.2% in 2030.

- **For long-haul trucks:** Full BET road toll exemptions would be narrow the TCO gap with diesel trucks from 33.6% to 21.2% in 2026, and from 20.5% to 7.6% in 2030.

Full Eurovignette implementation: BET TCO gap reduced to 1% with diesel trucks in 2026 and BET TCO 10.7% lower in 2030.

Questions?
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Eurovignette Implementation Across Europe

Silvia Haas-Memedovic

Austria

Stijn Gründeman

The Netherlands

Andreas Toft-Schaldemose

Denmark

Aleksander Jensen Bentsborg

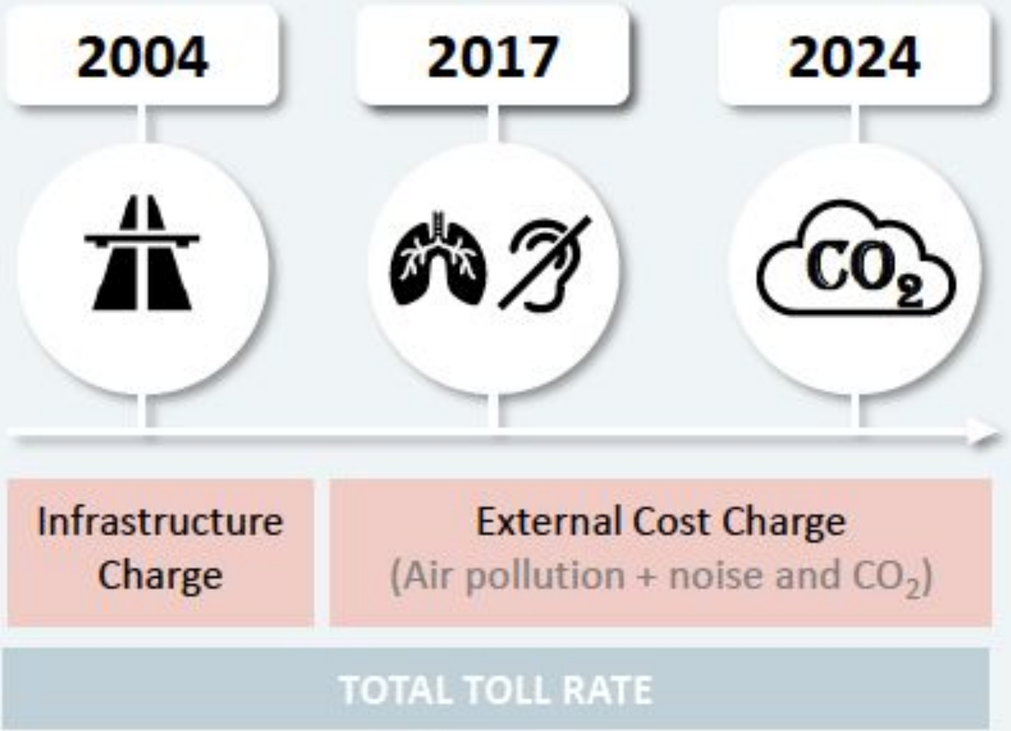
Norway

Christoph Schreyer

Switzerland

Eurovignette: Country Perspective Austria

TOLL RATE COMPONENTS



Relevant **vehicle characteristics** for toll rate level:

- Number of axles
- EURO emission class
- CO_2 emission class

Tolling on Austrian motorways and expressways

- 100 % funded by road users
- No government subsidies

Eurovignette: Country Perspective Austria

LESSONS LEARNED

CO_2-based tolls
ZEVs > 3.5 t:

75 %
toll reduction

→

Investment security for the transport and logistics sector

→

75 %
toll reduction
until the end of 2030

Q&A

Ministerie van Infrastructuur
en Waterstaat

Trucktoll in the Netherlands

On the road to a sustainable transport sector

Ministry of Infrastructure and Water Management

Stijn Gründeman
Senior Policy Officer

Approach to TruckToll

1) Introduce pay-per-use for trucks driving in the Netherlands
   - Specifically: vehicles in category N2 and N3
   - Eurovignette stops in NL
   - Road tax for trucks lowered
   - Starting July 1st 2026
2) Make the Dutch road transport sector more sustainable and efficiënt

How does Trucktoll relate to sustainability?

- Improves the business case of ZE trucks in NL
  - Much lower rates for ZE
  - Net proceeds used for subsidies for electric trucks and charging infrastructure
- Paying per km promotes logistical efficiency
  - Also, subsidies available for logistical efficiency

Effects

- ZE-trucks become more attractive coming years
- Equal effects of the TruckToll itself and the subsidies
- **13.000** extra ZE-trucks by 2030
- At that point 1/6 trucks in NL will be ZE

Differentiated rates

- We go live with CO2-based rates
- Rates also based on:
  - EURO-emission class
    - within CO2-emission class 1
  - Technical maximum mass of the combination
- Average rate is € 19,1 cent
- 80% discount for ZE-trucks
- No general exemption for ZE
  - Except for ZE-trucks up to 4.250kg

Examples (38-ton trucks)

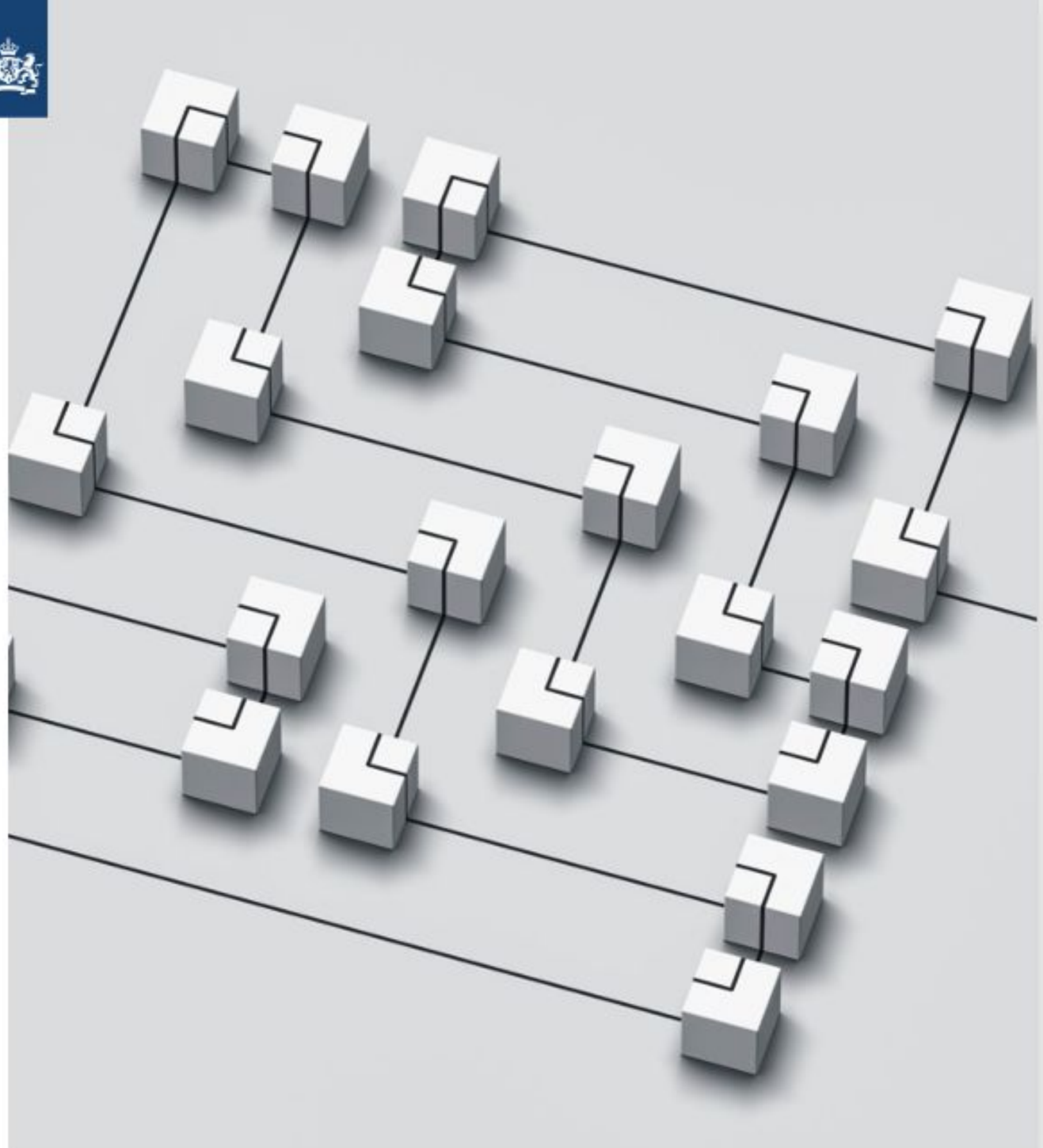
- **€ 34.9 cent** for euro 3
- **€ 20.1 cent** for euro 6
- **€ 3.8 cent** for ZE
- See **www.trucktoll.nl** for the rates

Which roads?

- Almost all highways
- Some provincial and municipal roads
- Carefully chosen
  - to prevent diversion to local roads
  - Also, monitoring possible diversion traffic on other roads

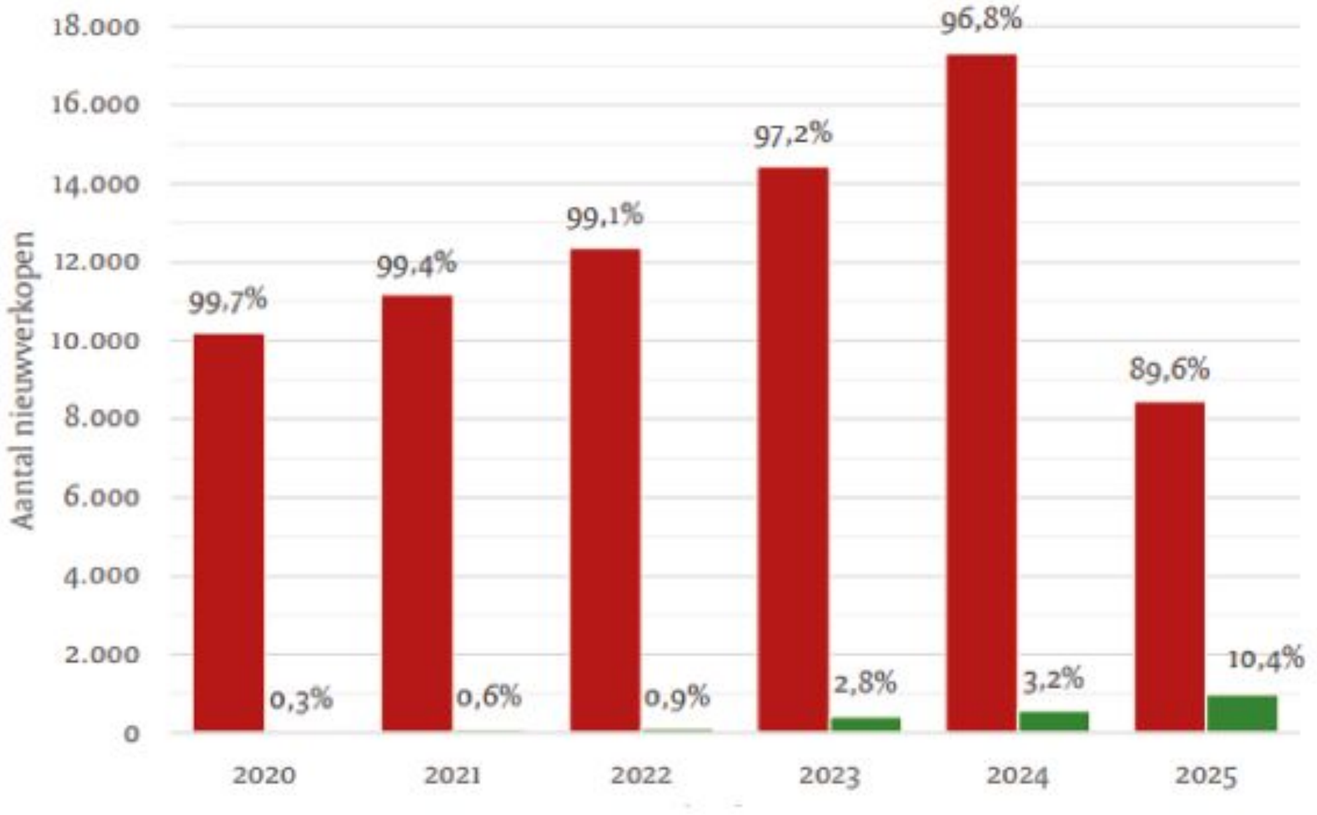
The 3 components of the charge

- Trucktoll formally consists of:
  1. An infrastructure charge
  2. An external cost charge for CO2-emissions
  3. An external costs charge for noise and air pollution
- Discount on infrastructure charge for ZE-emission trucks



Sharp increase in share of ZE trucks (in green) in truck sales in NL in 2025

Figuur 12 Samenstelling nieuwverkopen



Trend will continue coming years:

Expected Division of milions of kilometers driven per year per emission class in 2026 and 2030

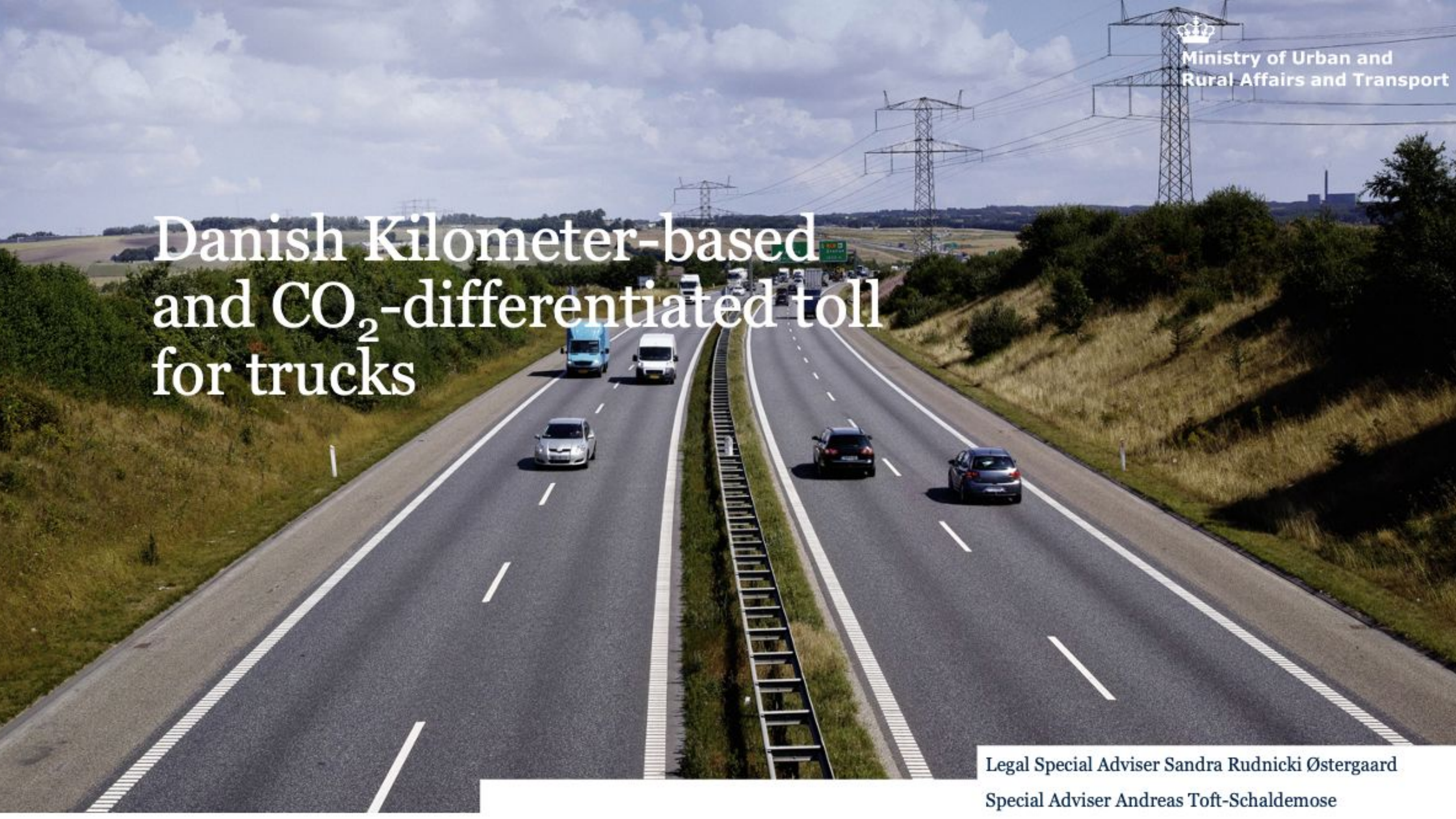
2026

CO2-1								CO2-2	CO2-3	CO2-4 (PHEV)	CO2-5 (ZE)	Total
EU0	EU1	EU2	EU3	EU4	EU5	EU6	EU7					
29	6	12	19	19	116	7.276	0	358	90	3	246	8.173
0,4%	0,1%	0,1%	0,2%	0,2%	1,4%	89,0%	0,0%	4,4%	1,1%	0,0%	3,0%	100,0%

2030

CO2-1								CO2-2	CO2-3	CO2-4 (PHEV)	CO2-5 (ZE)	Total
EU0	EU1	EU2	EU3	EU4	EU5	EU6	EU7					
12	2	3	4	2	21	5.902	1674	0	0	0	639	8.260
0,1%	0,0%	0,0%	0,0%	0,0%	0,3%	71,5%	20,3%	0,0%	0,0%	0,0%	7,7%	100,0 %

Source: Varianten voor tariefstructuur vrachtwagenheffing bij implementatie herziene Eurovignet-richtlijn Revnext, 2023



Ministry of Urban and Rural Affairs and Transport

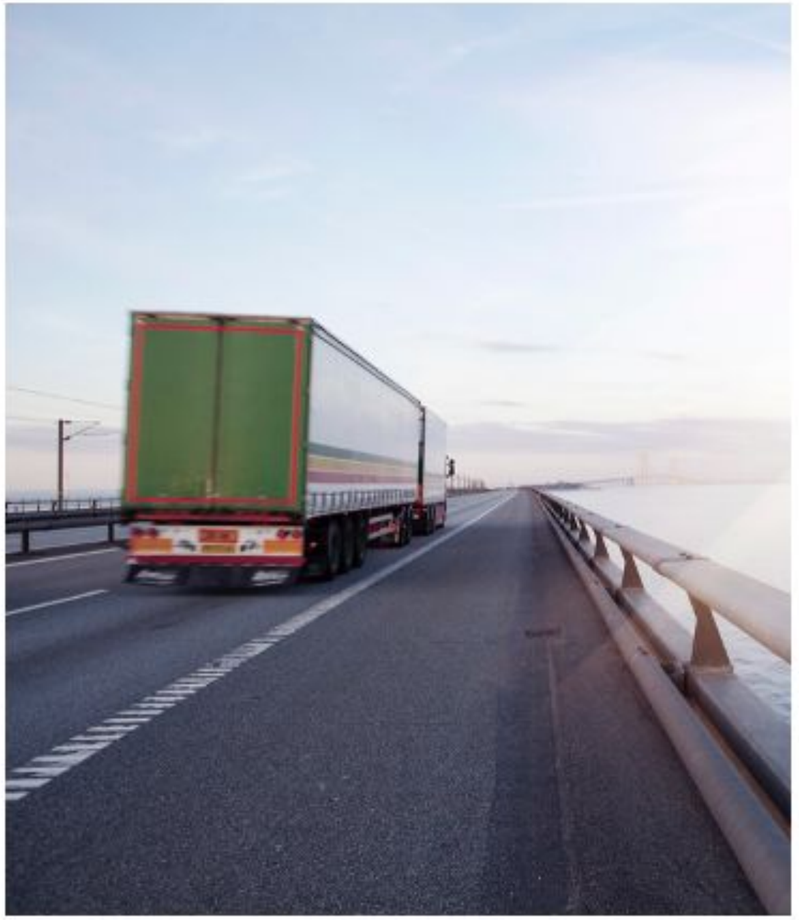
Danish Kilometer-based and CO_2-differentiated toll for trucks

Legal Special Adviser Sandra Rudnicki Østergaard

Special Adviser Andreas Toft-Schaldemose

Ministry of Urban and
Rural Affairs and Transport

About the Danish Kilometer-based and CO_2-differentiated toll for trucks



Effects

- The toll is expected to reduce CO2-emissions with around 0.3 mill. ton in 2025 and 0.4 mill. ton in 2030

Weight

- The toll is paid for heavy goods vehicles with technically permissible maximum laden mass at 12 ton and above
- As from 1 January 2027, trucks from 3.5 ton will be included in the toll

Rates and differentiation

- The average toll rate will be around 1.2 kr. (ca. 0.16 EUR)/km in 2030
- Kilometer-based and differentiated according to weight and specific CO2-emission of the truck.
- 50 percent higher rates on roads within the environmental zones of the larger cities

Road network

- The road network covered by the toll is the state road network (motorways and other primary roads) – about 11.000 km of roads
- As from 1 January 2028, the road network is planned to be enlarged to the whole public road network – about 75.000 km

Toll rate structure under the EU legal framework

- The Danish road toll consists of three elements:
  - I. Charge for traffic-based CO2 emissions,
  - II. Charge for infrastructure costs, and
  - III. Charge related to traffic-based noise and air pollution
- CO2-differentiated in five CO2 emission classes following art. 7 ga in Directive 1999/62/EC, with later amendments.
- The toll rates provide for the maximum possible differentiation in terms of CO_2 emissions and charge for infrastructure costs in order to reduce CO_2 emissions as much as possible
- ZEV's in CO_2 emission class 5 receive 75 percent discount compared to vehicles in CO_2 emission class 1

Kroner pr. kilometer	Teknisk tilladt total-vægt på 12.000- 17.999 kg	Teknisk tilladt total-vægt på 18.000-32.000 kg	Teknisk tilladt total-vægt på over 32.000 kg
CO_2-emissionsklasse 1	0,86	1,00	1,10
CO_2-emissionsklasse 2	0,79	0,92	1,01
CO_2-emissionsklasse 3	0,69	0,82	0,91
CO_2-emissionsklasse 4	0,46	0,53	0,58
CO_2-emissionsklasse 5	0,13	0,13	0,13

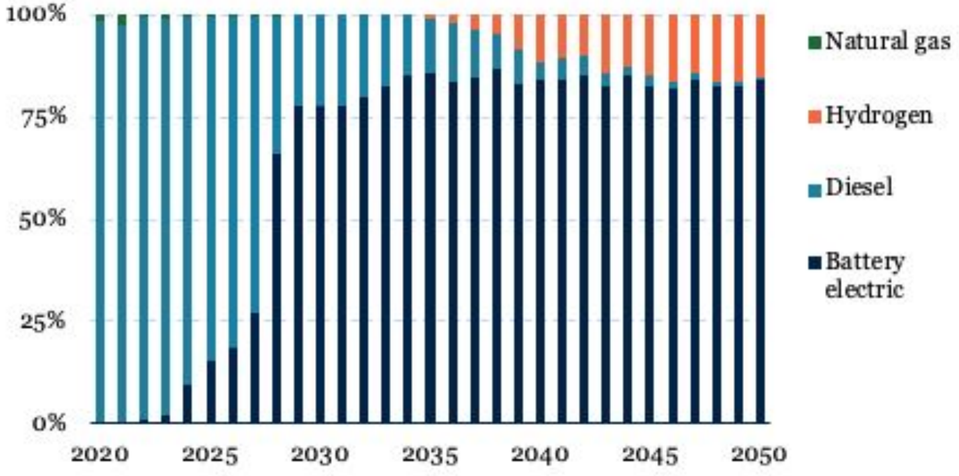
Supporting decarbonization and electrification through a broader policy approach

- The Danish road toll for heavy goods vehicles is one element in Denmark's broader approach to decarbonising heavy road transport.
- It also includes:
  - State subsidies for purchase of zero-emission trucks, charging infrastructure, etc.
  - Energy taxation measures, including a relatively higher taxation on diesel fuel from 2025
- Heavy-duty road transport is already facing quite strong CO_2 incentives in Denmark — through higher diesel fuel taxation, state subsidies for purchase of zero-emission trucks and charging infrastructure, and a CO_2-differentiated road toll with a substantially lower rate for zero-emission trucks.

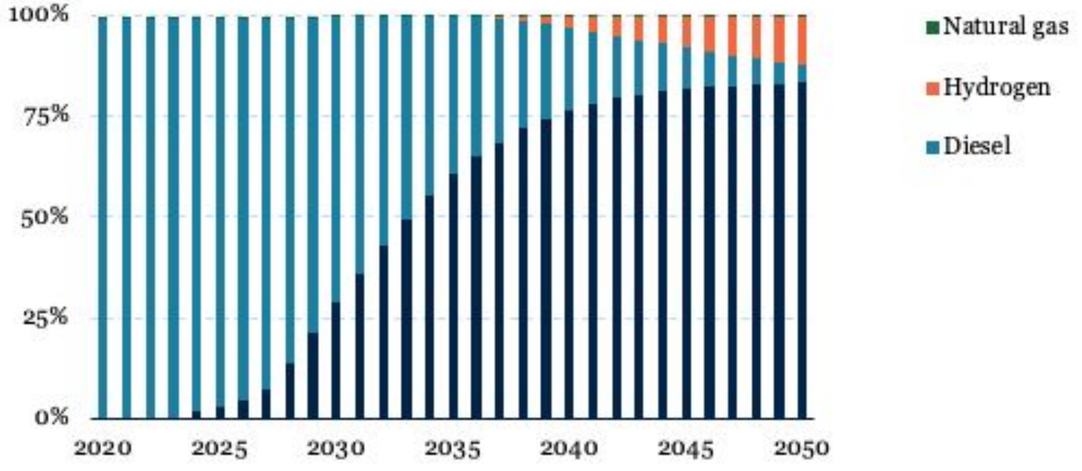
Where are we in terms of electrification of heavy road transport in Denmark?

- Diesel fuel is still the most widespread propellant in Denmark used by trucks, but…
- In 2026, we expect zero-emission trucks to constitute ca. 19 percent of *new sales* in Denmark. By 2030, we expect 77,6 percent of new sales to be zero-emission trucks rising to 84 percent in 2040.
- In 2026, only 2 percent of the fleet consists of zero-emission trucks. In 2035, we expect the share to be 27 percent, and 45 percent by 2050.

Share of total sales



Share of fleet



Questions?

Statens vegvesen

Zero emission trucking in Norway from a road tolling perspective

Unlocking Zero-Emission Trucking in Europe, 30th June 2026

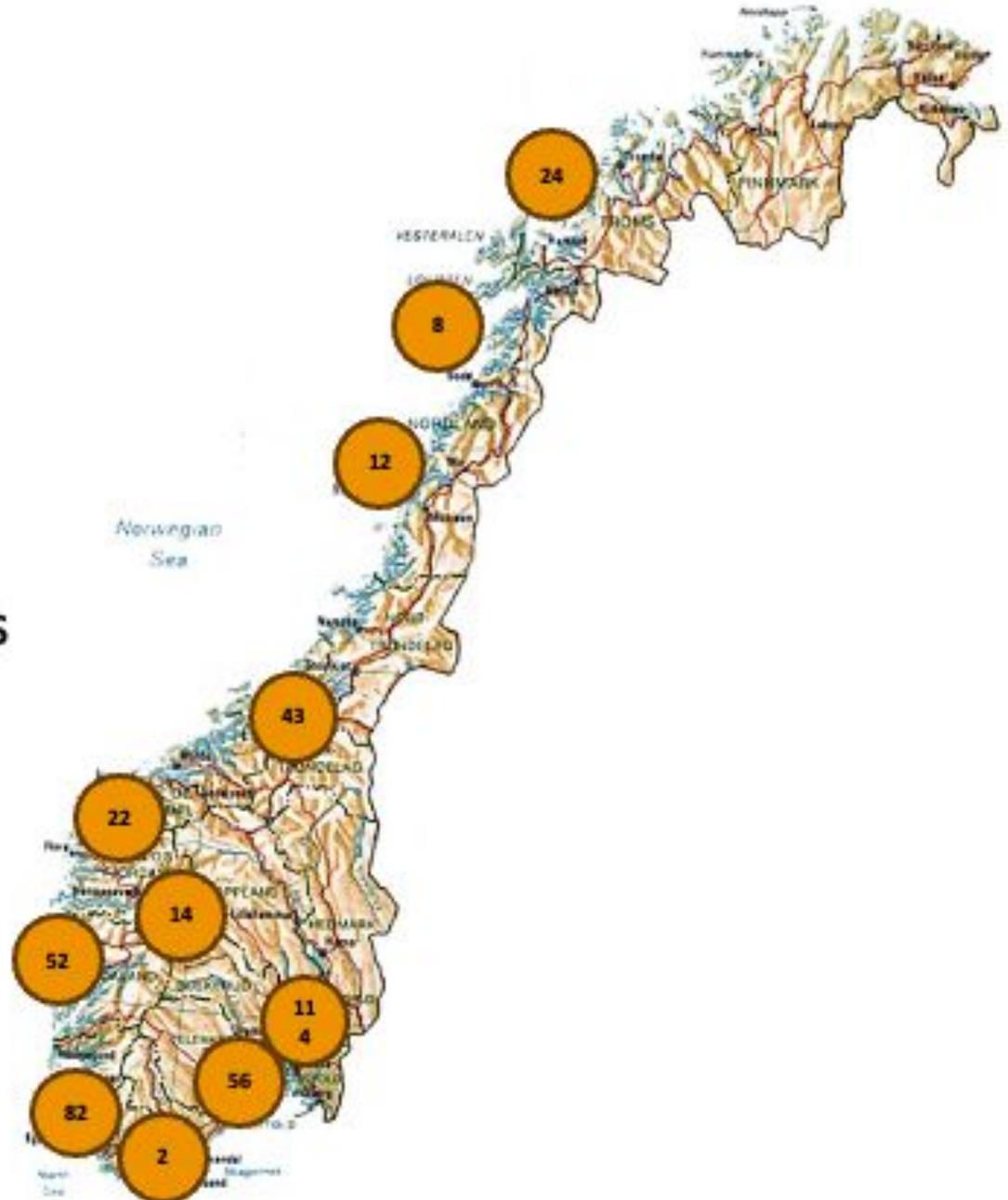
Senior adviser Aleksander J. Bentsborg

Norwegian Public Roads Administration

Norway

- Population: 5,6 million
- Area: 386 186 km²
- Road network: 97 746 km
- Five regional Toll Collectors

Toll stations



Road Tolling Principles

Statens vegvesen

- The main purpose of road tolls in Norway is financing road infrastructure.
- Road tolling is also used as a measure to reduce traffic and emissions.
- Prices vary based need for financing, vehicle type and traffic load.
- Heavy veichles (above 3500kg) typically pay 2-3 times more than lighter veichles.
- From approximately 3,5 euro to
  50 euro per passing.

Road tolling for heavy zero-emission vehicles

Statens vegvesen

- Electric heavy duty veichles do practically not pay road tolls in any road toll projects today.

- Exceptions:
  - Ferries
  - No Autopass appointment (mandatory)

- Future:
  - National transport plan (NTP) 2025-2036:
  - The government has stated that there will be no toll fees until 2030.

Example of bridge with high tariffs

Statens vegvesen

Photo: Møre og Romsdal fylkeskommune

Tariff group 1 (up to and including 3500 kg)

Vehicles with permissible total weight **up to 3500 kg** and passenger cars in vehicle category M1 in Autosys with a valid agreement.

Toll booths	Full price	By appointment	Zero-emission vehicles with agreement
No. 659 Nordøyvegen	DKK 186,00	DKK 148,80	DKK 104,16

Tariff group 2 (from 3501 kg)

Vehicles with permissible total weight **from 3501 kg** with the exception of passenger cars in vehicle category M1 in Autosys with a valid agreement.

Toll booths	Full price	By appointment	Zero-emission vehicles with agreement
No. 659 Nordøyvegen	DKK 557,00	DKK 557,00	DKK 0,00

Statistics: Does it work?

Statens vegvesen

Road toll passings heavy duty veichles: share of electric veichles in this category	
2022	3,8 %
2023	6,7 %
2024	10,0 %
2025	12,6 %
2026 (per. 30th mai)	14,8%

Heavy duty vehicles = above 3 500kg

Statistics: Does it work?

Statens vegvesen

Road toll passing heavy duty veichles: share of electric veichles in this category	
2020	
2021	
2022	3,8 %
2023	6,7 %
2024	10,0 %
2025	12,6 %
2026 (per 10th june)	

Heavy duty veichles = above 3 500kg

Registration of new heavy lorries: Share of electric veichles in this category		**Total number**
2020	0,4 %	0,1 %
2021	1,5 %	0,2 %
2022	4,2 %	0,5 %
2023	4,2 %	0,9 %
2024	8,4 %	1,8 %
2025	10,3 %	2,7 %
2026 (per 10th june)	14,8%	3,2 %

Heavy lorries = above 12 000kg

Registration of new light lorries: Share of electric veichles in this category		**Total number**
2020	0,5 %	0,1 %
2021	2,3 %	0,1 %
2022	39,5 %	1,5 %
2023	62,4 %	5,1 %
2024	46,9 %	7,4 %
2025	61,9 %	10,9 %
2026 (per 10th june)	63,4 %	12,4 %

Light lorries = between 3 500 kg and 12 000 kg

Statens vegvesen

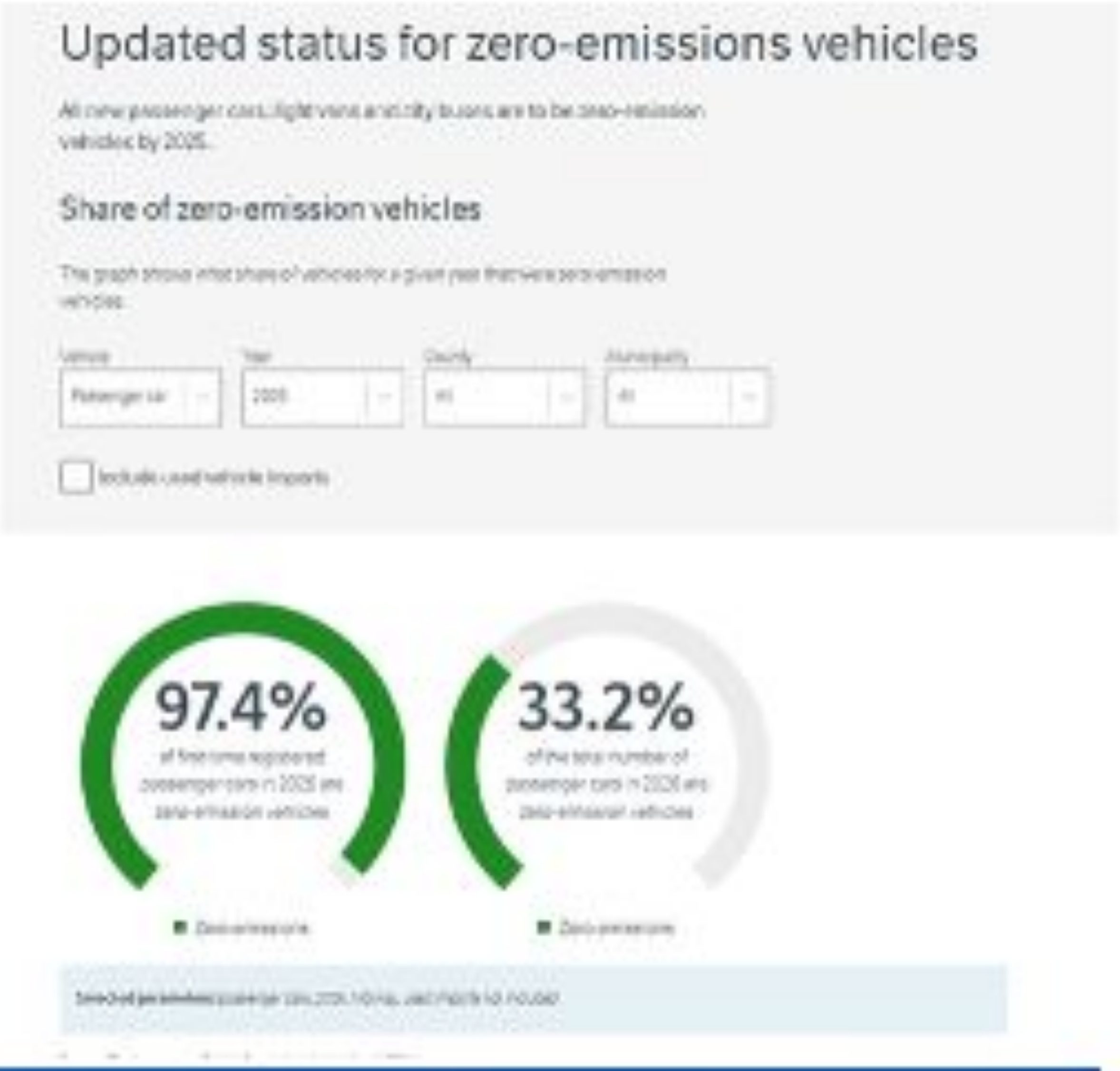



Photo: Bård Asle Nordbø (NPRA)


Photo: Lars Olve Hersjedal (NPRA)


Photo: Knut Opeide (NPRA)

Thank you for the attention

Statens vegvesen

Statistics link:

- Share of zero-emission vehicles
- Statbank Norway – SSB

Questions?

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Atlanterhavsvegen - photo: Jarle Wæhler

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Bundesamt für Energie BFE
Office fédéral de l'énergie OFEN
Ufficio federale dell'energia UFE
Swiss Federal Office of Energy SFOE

THE PERFORMANCE-RELATED HEAVY VEHICLE FEE IN SWITZERLAND: INCENTIVES FOR THE ELECTRIFICATION OF HEAVY-DUTY VEHICLES

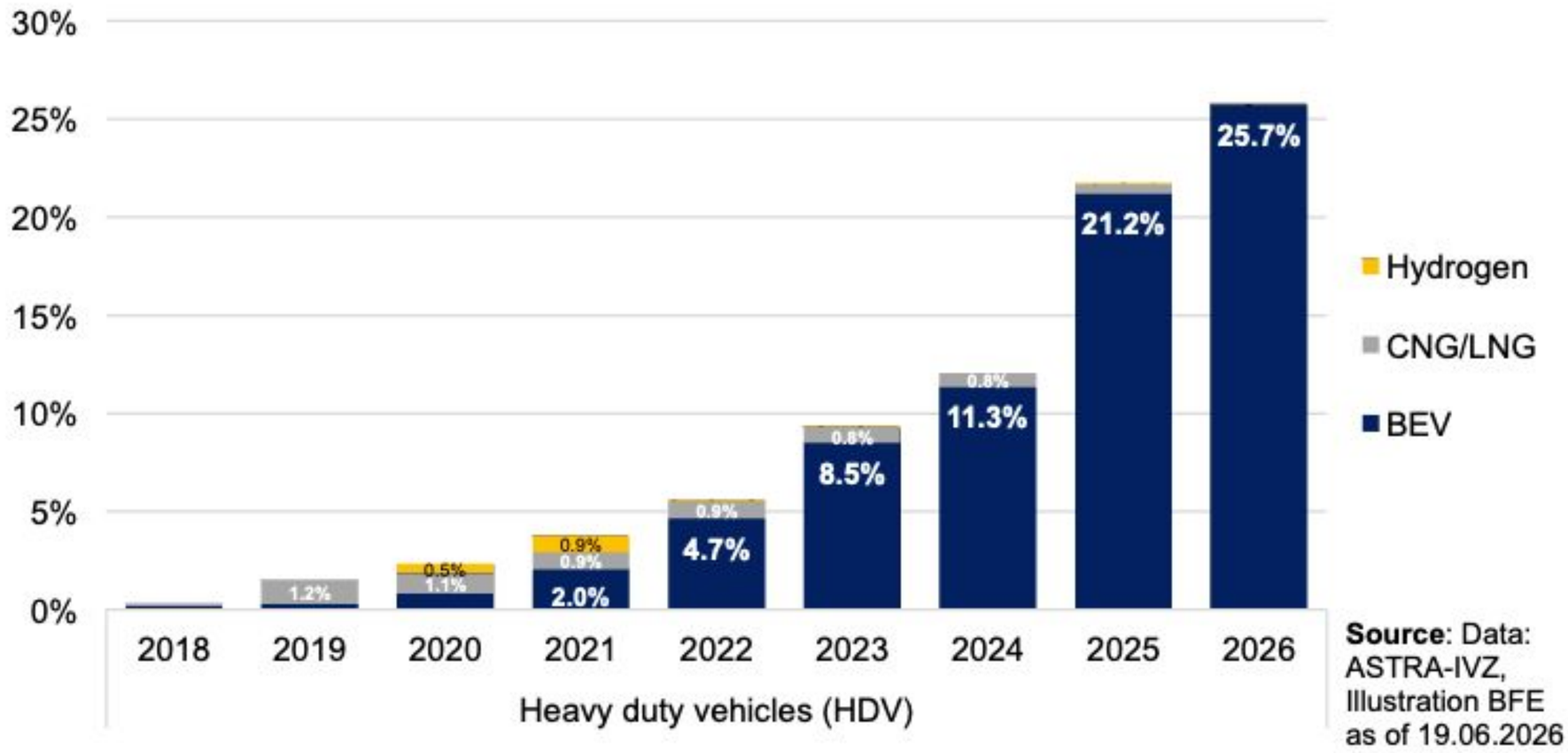
TRUCK ROAD TOLLS IN SWITZERLAND • CHRISTOPH SCHREYER • HEAD OF ENERGY-EFFICIENT TRANSPORT • SFOE • JUNE 30, 2026

MARKET DEVELOPMENT
ELECTRIC TRUCKS

HEAVY GOODS VEHICLES
NEW REGISTRATIONS 2018 – JUNE 2026

Share of new registrations of alternative power trains

Heavy commercial vehicles > 3.5 tonnes, 2018 - June 2026

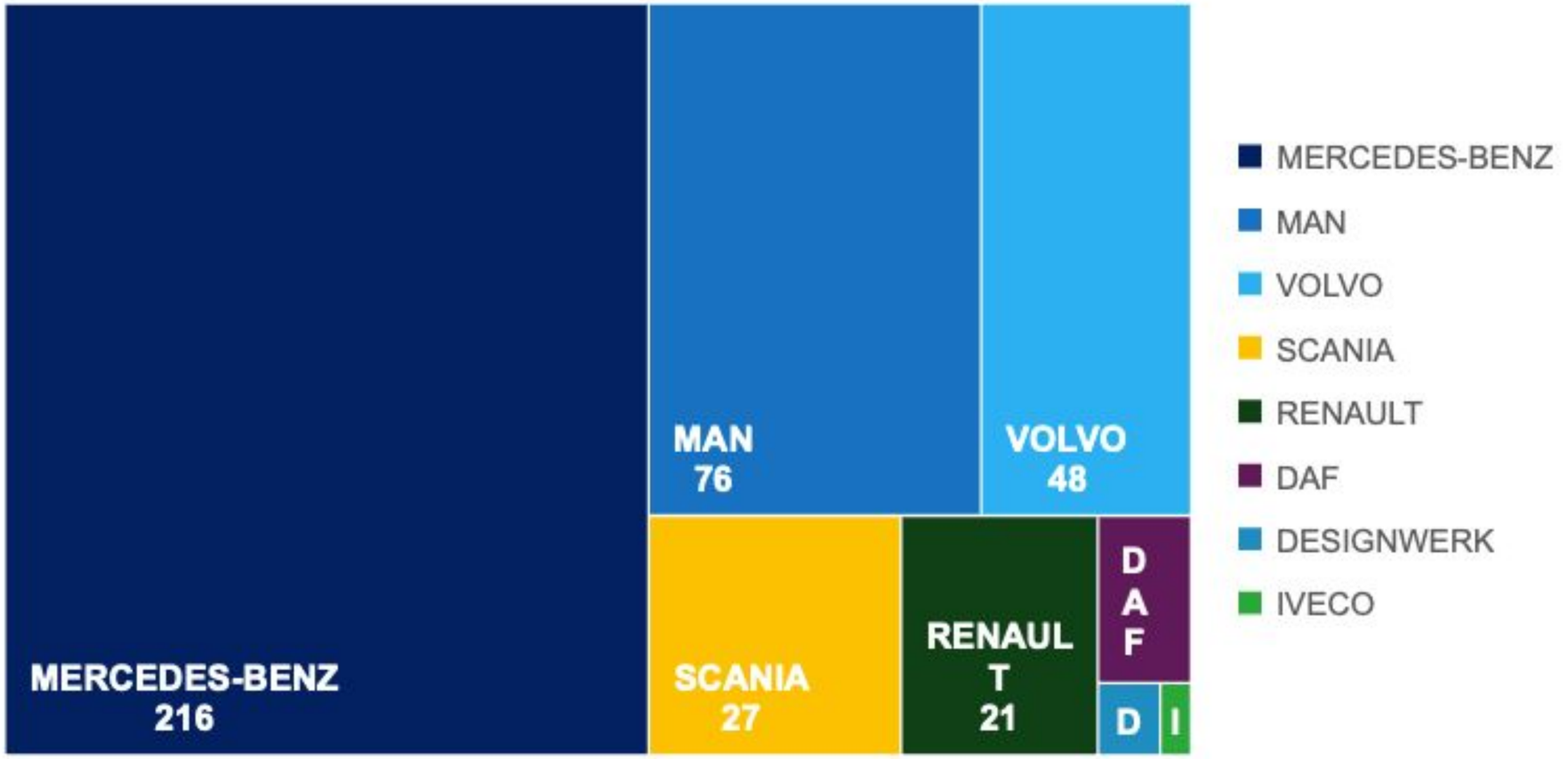


Source: Data: ASTRA-IVZ, Illustration BFE as of 19.06.2026

Source: Illustration SFOE, Data IVZ ASTRA, June 19, 2026

HEAVY ELECTRIC TRUCKS
BIG DIFFERENCES BETWEEN MANUFACTURERS

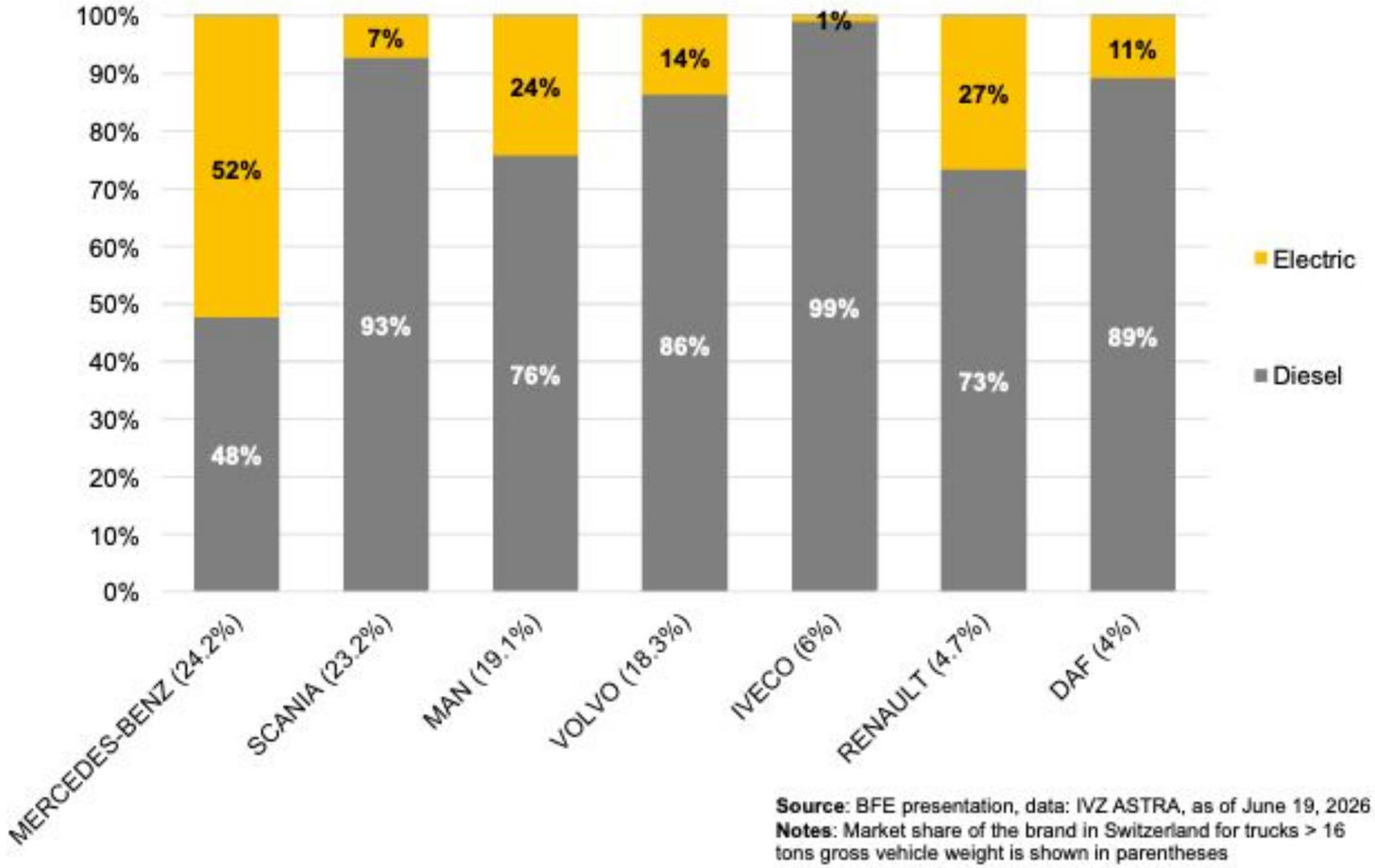
New registrations of electric trucks > 16 tonnes by manufacturer
January-June 2026



Source: Illustration SFOE, Data IVZ ASTRA, June 19, 2026

HEAVY ELECTRIC TRUCKS
BIG DIFFERENCES BETWEEN MANUFACTURERS

Powertrain mix for trucks > 16 tons by manufacturer Switzerland 2026
Powertrain technologies for trucks and semi-trailer trucks > 16 tons, January–June 2026



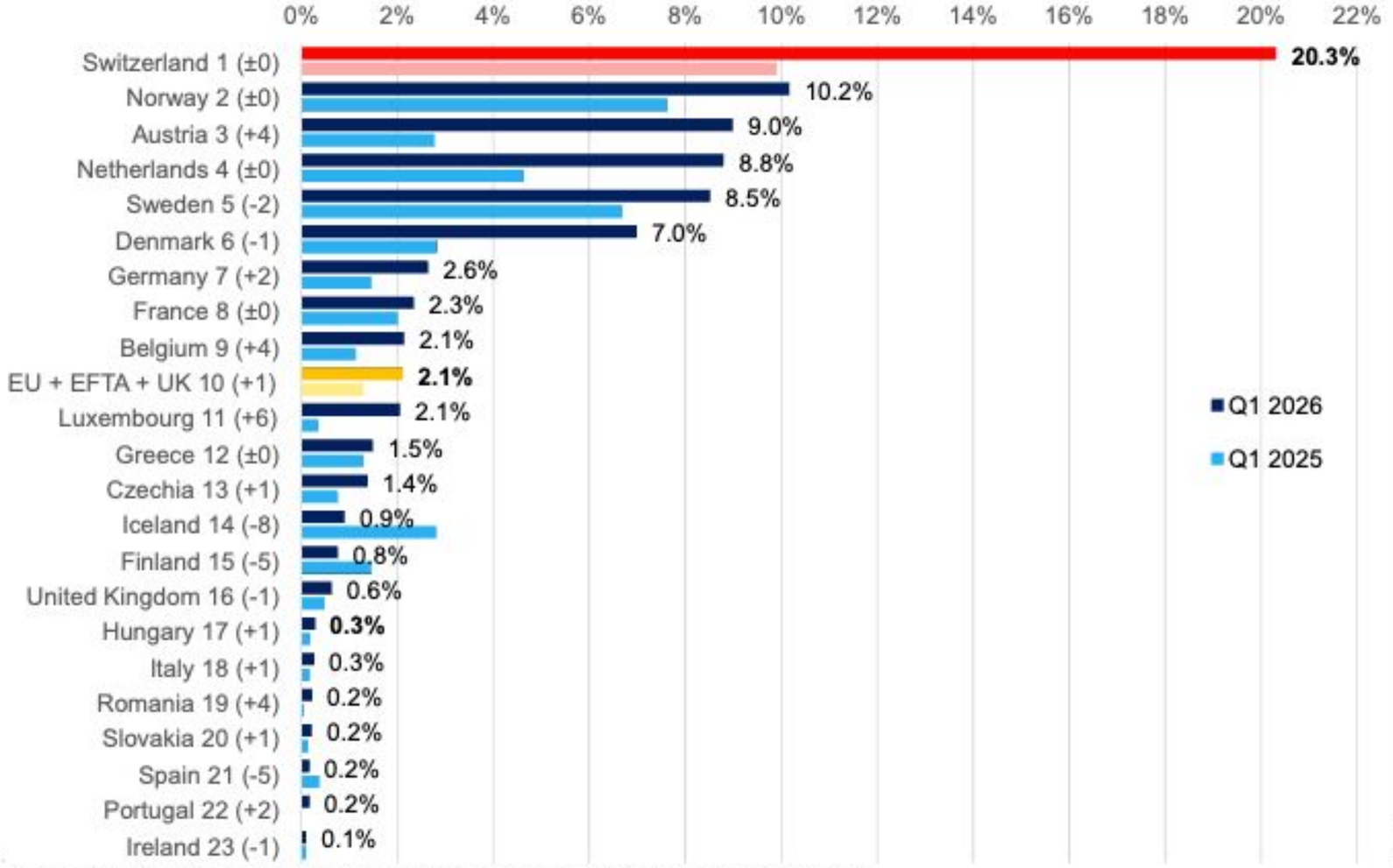
Source: BFE presentation, data: IVZ ASTRA, as of June 19, 2026
Notes: Market share of the brand in Switzerland for trucks > 16 tons gross vehicle weight is shown in parentheses

Source: Illustration SFOE, Data IVZ ASTRA, June 19, 2026

ELECTRIC HEAVY TRUCKS > 16 T IN EUROPE
NEW REGISTRATIONS 1ST QUARTER 2026

Share of new registrations of heavy electric trucks Q1 2026 vs. Q1 2025

Switzerland + Europe, Share of electric trucks >16 tons of all trucks > 3.5 tons.

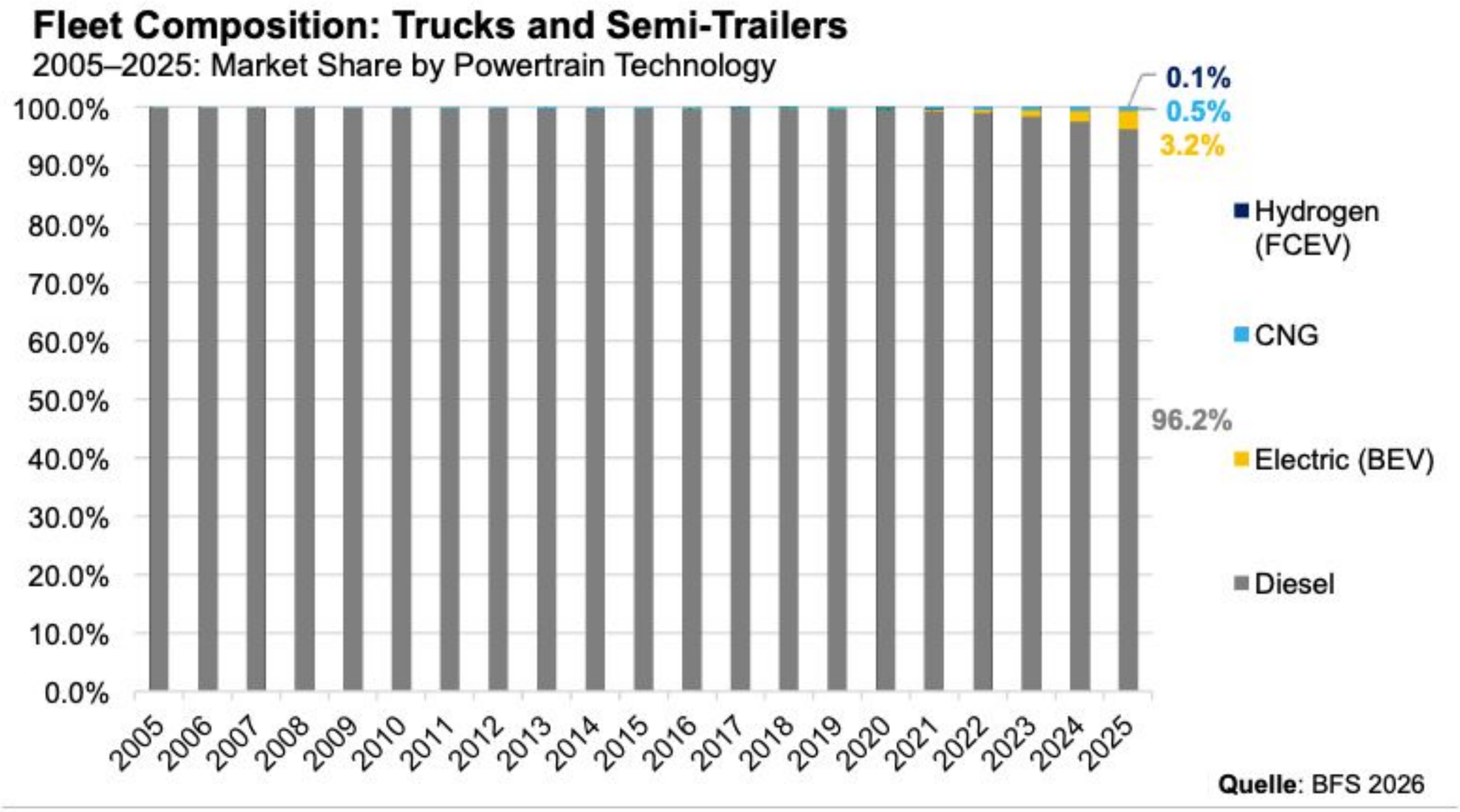


Quelle: Darstellung BFE, Daten ACEA https://www.acea.auto/files/Press_release_commercial_vehicle_registrations_Q1-2026.pdf
Bemerkungen: Electric trucks: Kategorie umfasst gem. ACEA BEV und PHEV, in Klammern (Rangverschiebung 2026 vs. 2025)

Source: ACEA, April 29, 2026: https://www.acea.auto/cv-registrations/new-commercial-vehicle-registrations-vans-2-3-trucks-10-7-buses-24-5-in-q1-2026/

E 30, 2026

HEAVY GOODS VEHICLES IN SWITZERLAND
FLEET 2025 BY POWERTRAIN TECHNOLOGY



Quelle: Federal Statistical Office FSO, 2026

FRAMEWORK CONDITIONS HVF

TRUCK ROAD

PERFORMANCE-RELATED HEAVY VEHICLE FEE
BASIC FEATURES - 2026

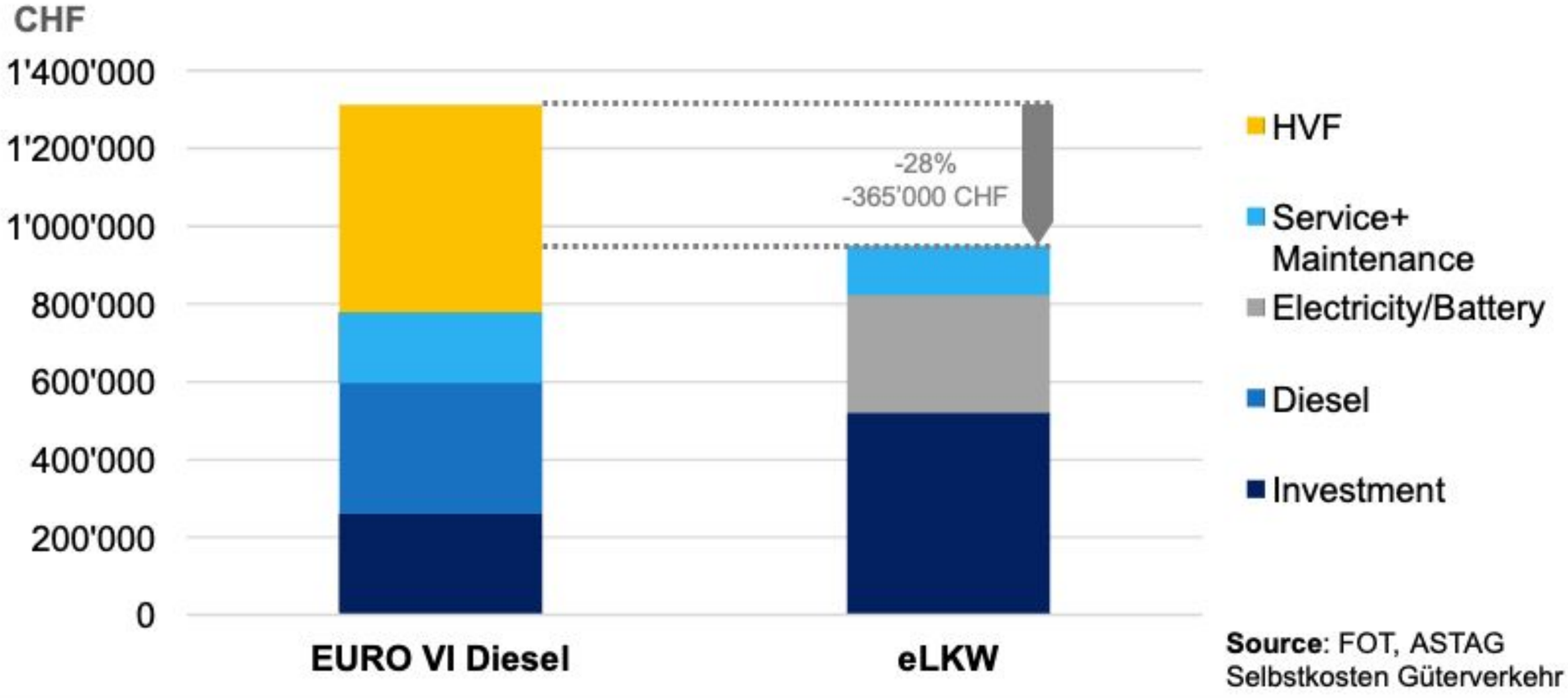
Tax category	Euro category	Tariff
I	Euro 0 to 5	3.26 Cts./tonne-km
II	-	2.82 Cts./tonne-km
III	Euro 6	2.39 Cts./tonne-km
Battery and fuel cell electric		0.00 Cts./tonne-km

PERFORMANCE-RELATED HEAVY VEHICLE FEE
CALCULATION EXAMPLE

		Total weight	Tariff cents/tkm	CHF/km	Annual mileage km	Annual HVF CHF
Diesel		18 t	2.39	0.43	80'000	34'416
Electric		18 t	0	0.00	80'000	0

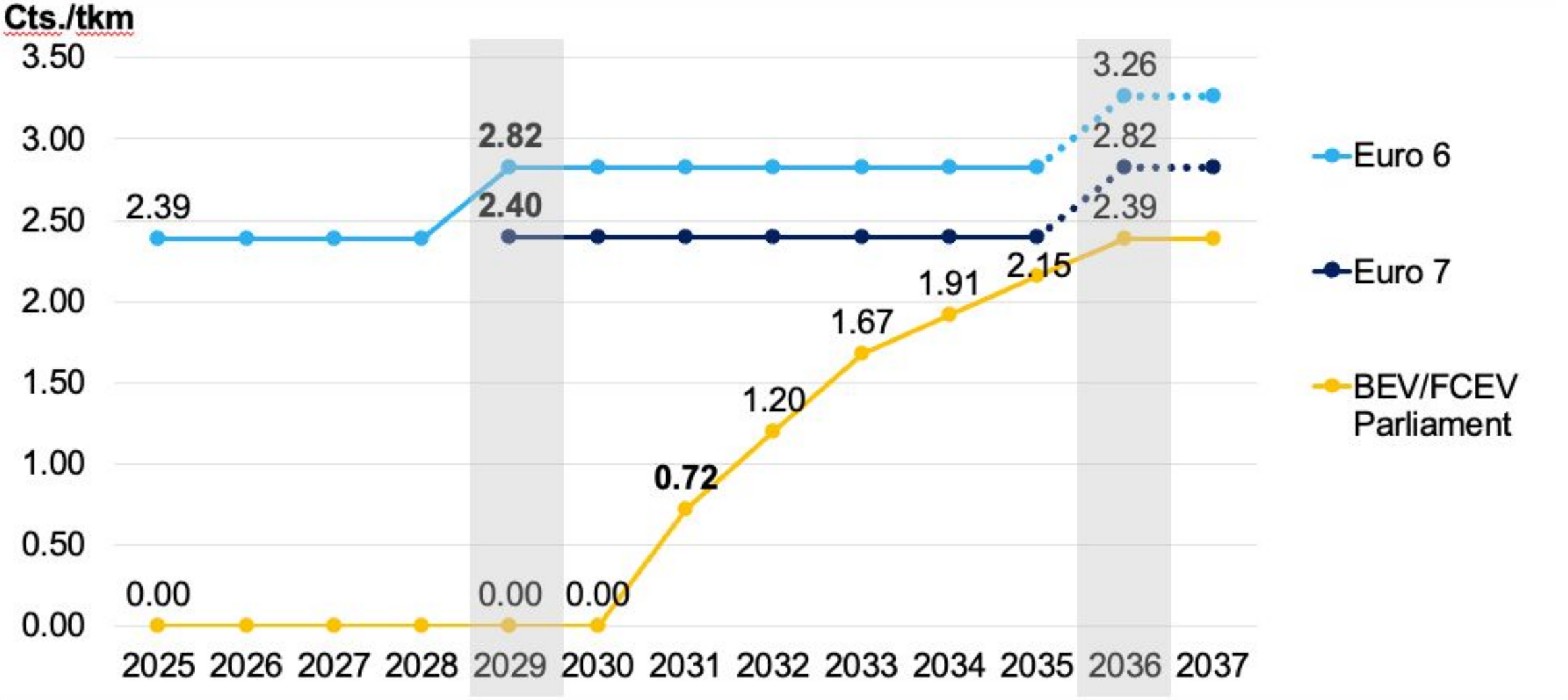
EXAMPLE FOR A 40 TONS TRUCK
ELECTRIC TRUCK WITH LOWER TCO

Comparison totals costs of a 40 tons truck
Diesel EURO VI vs. Electric truck, 80'000 km per year for 7 years



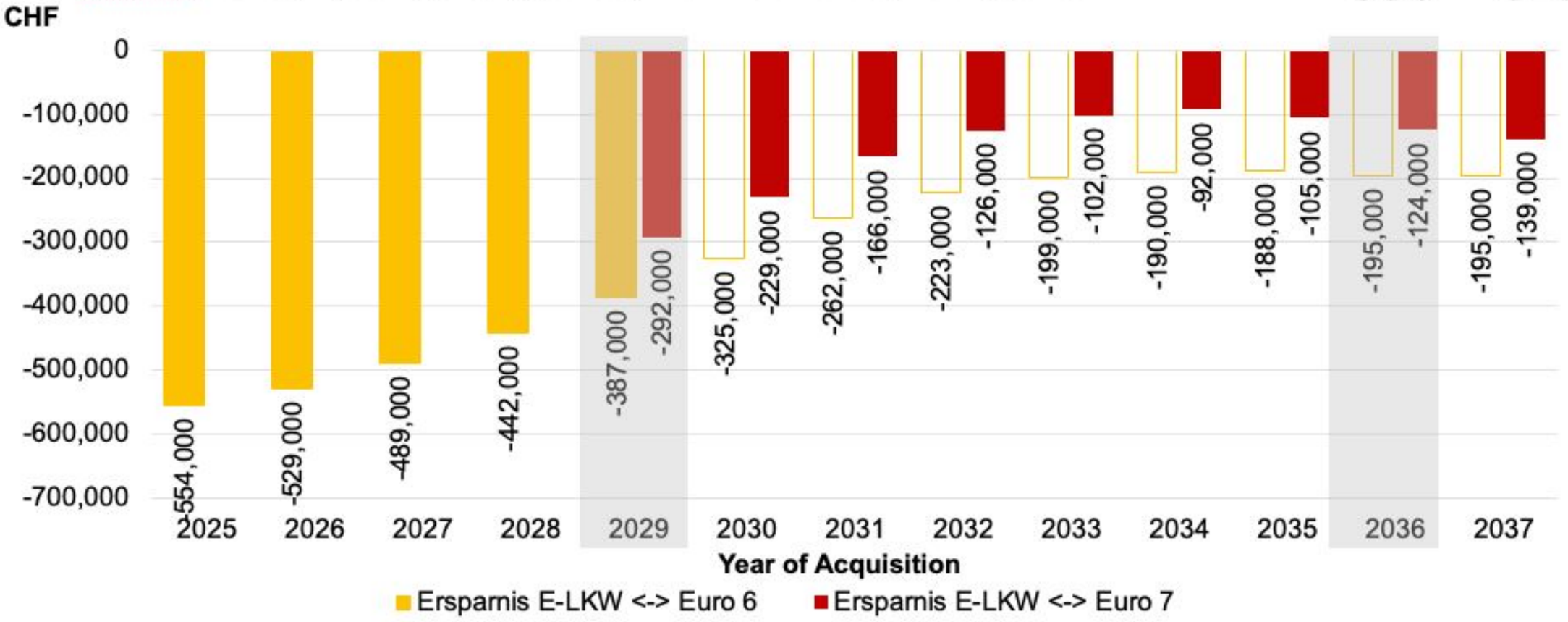
Source: FOT, ASTAG
Selbstkosten Güterverkehr

HVF TARIFFS TODAY AND...
... FUTURE DEVELOPMENT



HVF SAVINGS COMPARED WITH EURO 6/7
ELECTRIC TRUCK, GROSS WEIGHT 40 TONS

Heavy Vehicle Fee savings for a 40-ton e-truck in the corresponding acquisition year
Annual mileage 80'000, 7-year operating period, in CHF over the operating period



KEY MESSAGES

- The HVF provides strong incentives, especially for vehicles with high annual mileage
- HVF savings offset the higher purchase costs of electric trucks and, in most cases, the cost of charging infrastructure
- As electric trucks continue to become more affordable, the TCO advantages will remain even after the HVF is introduced for electric trucks

Thank you

Christoph Schreyer
Head of Energy-Efficient Transport

Federal Department of the Environment, Transport, Energy and Communications DETEC
Swiss Federal Office of Energy SFOE, Energy-Efficient Transport Section

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Q&A

Eurovignette—Industry Insights

Graham Major-Ex
Sennde
r

Caryn-Ann Allen
Geopost

Tomas Fabian
ACEA

FOCUS:

- Early business impacts & operational experience
- Investment and fleet transition signals
- Opportunities and remaining challenges


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EUROPE'S GREEN
FREIGHT FORWARDER
FAST FORWARDING ROAD LOGISTICS

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Opening Question:

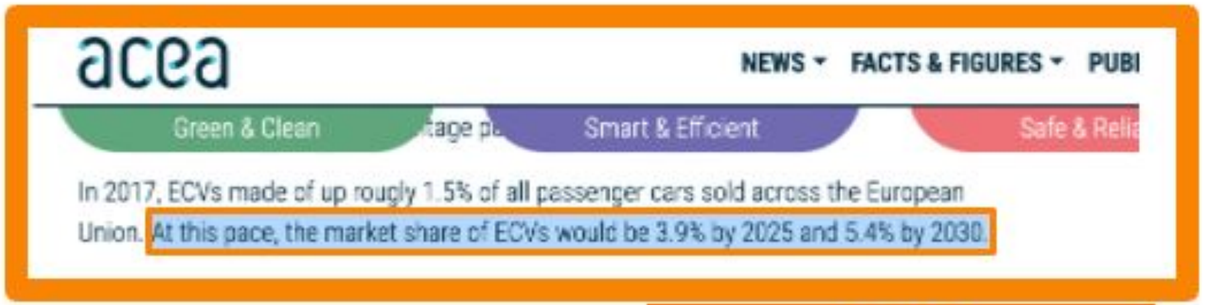
What if there were a technology that could produce Diesel fuel for EUR .37 per litre?

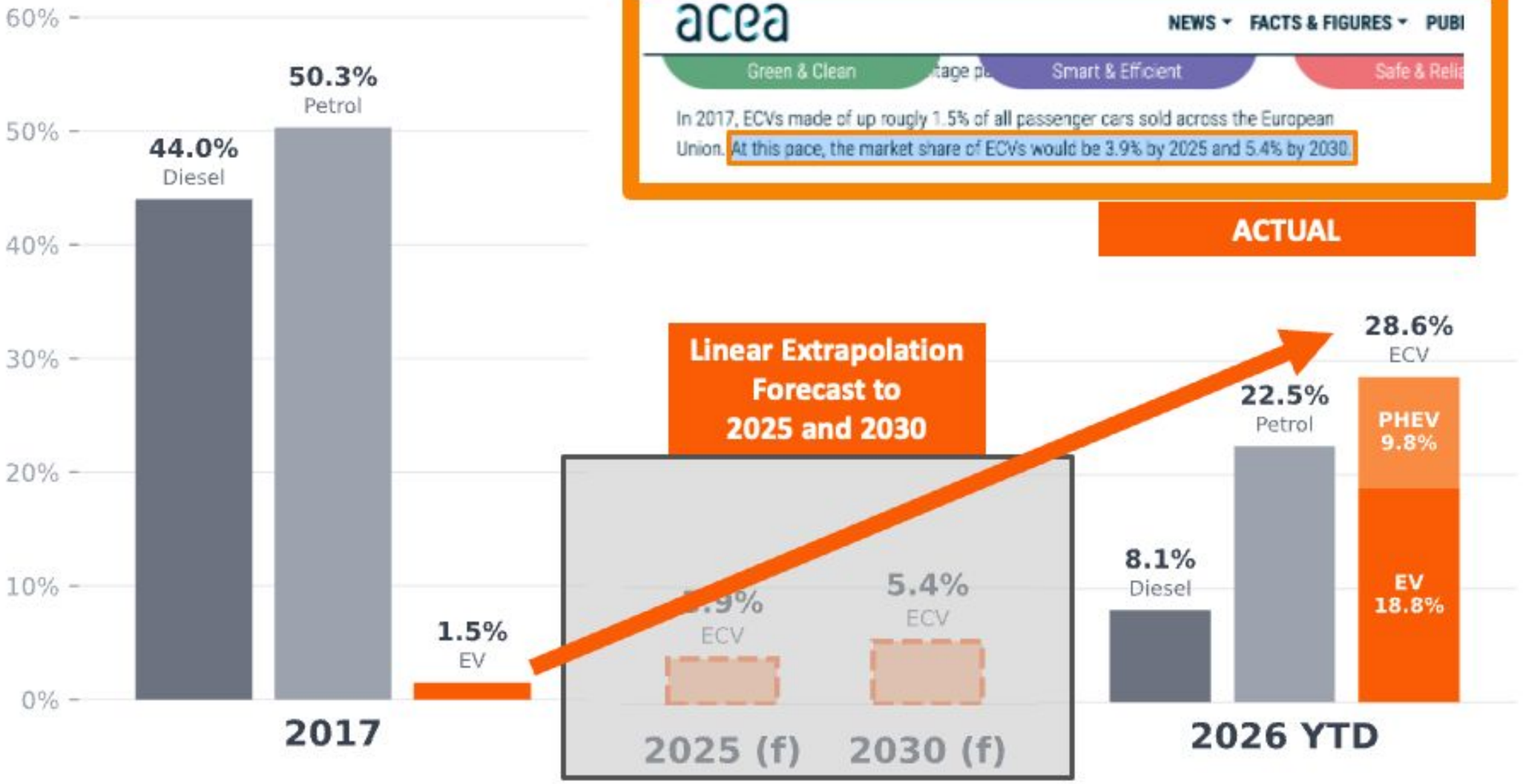
(77% fuel cost reduction)

Cars

ALL NEWLY PURCHASED CARS IN EU: 2017 PREDICTIONS VS. TODAY

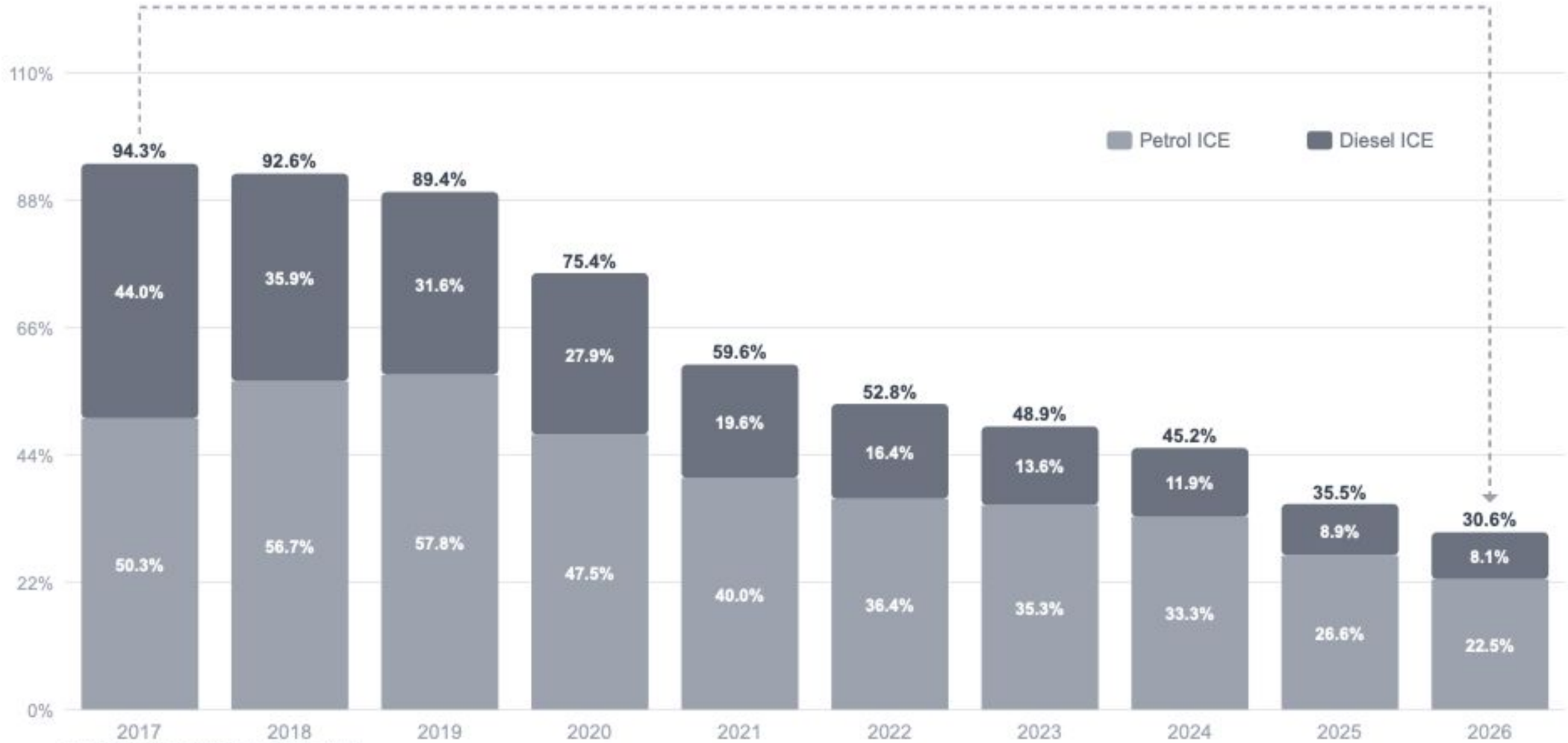
CAR MARKET SHOWS THE FUNDAMENTAL TRANSITION ALREADY CONCLUDED





ALL NEWLY PURCHASED CARS IN EU: DIESEL + PETROL AS % OF TOTAL

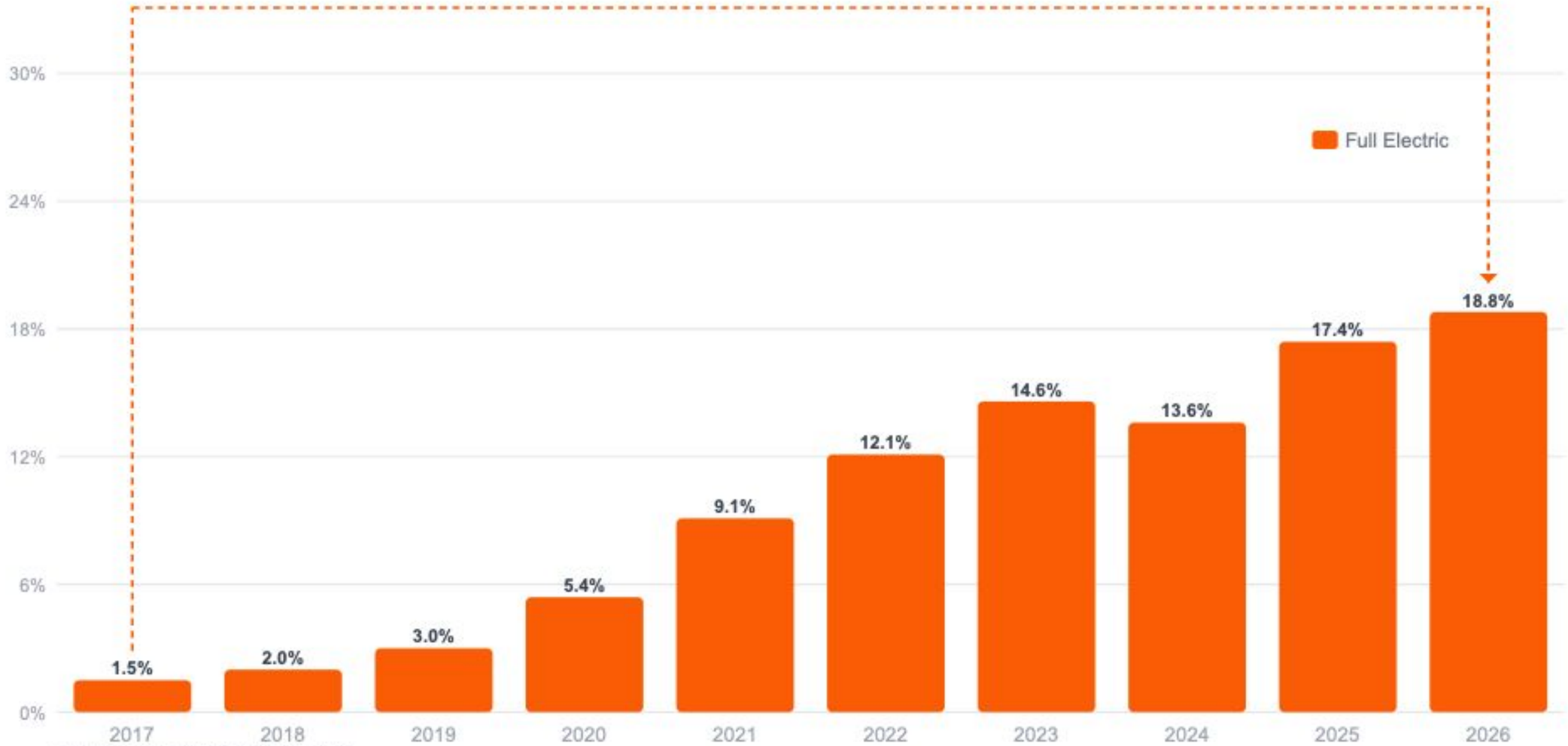
CAR MARKET SHOWS THE FUNDAMENTAL TRANSITION ALREADY CONCLUDED



EU vehicle registration data. 2026 = YTD.

ALL NEWLY PURCHASED CARS IN EU: FULLY ELECTRIC AS % OF TOTAL

CAR MARKET SHOWS THE FUNDAMENTAL TRANSITION ALREADY CONCLUDED



EU vehicle registration data. 2026 = YTD.

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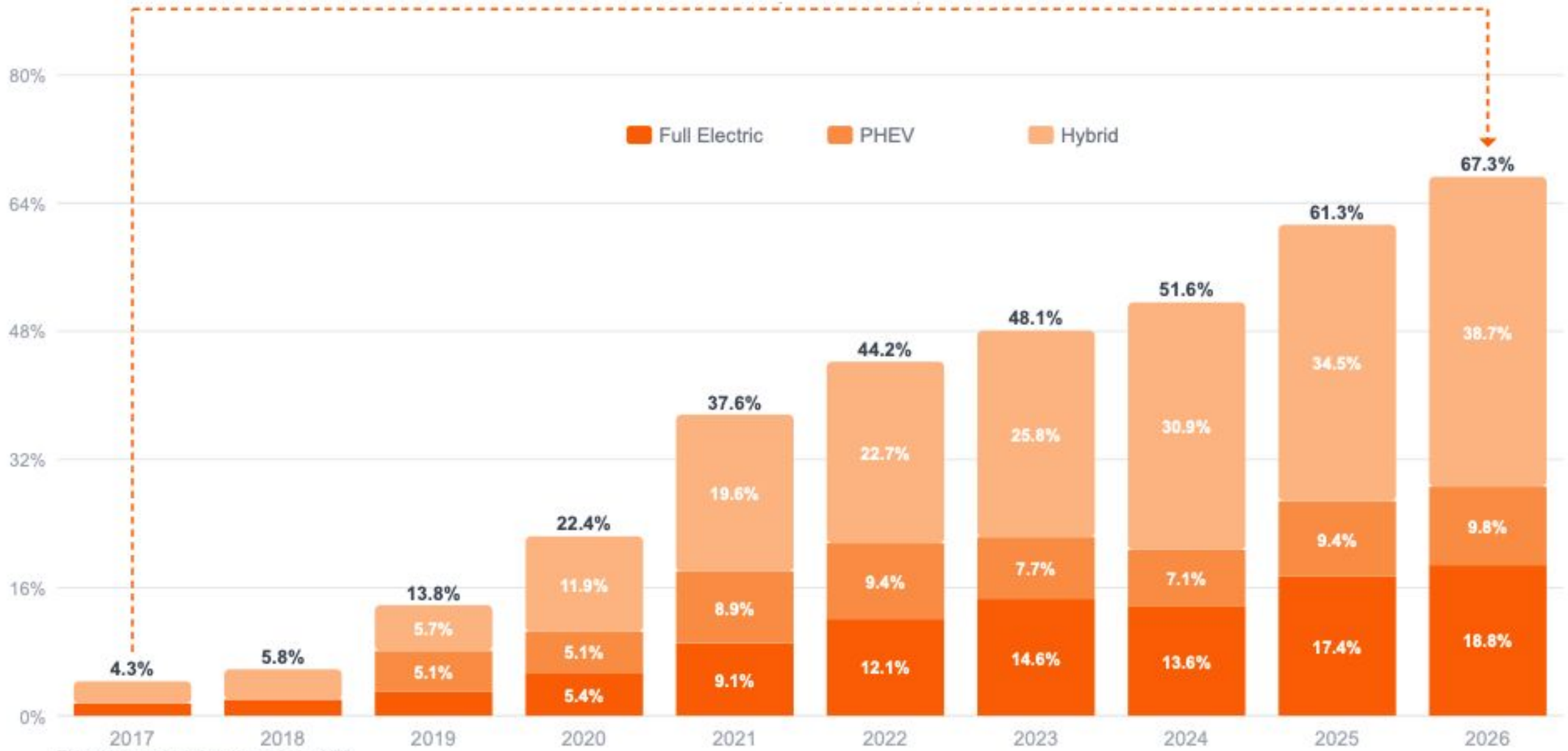
ALL NEWLY PURCHASED CARS IN EU: ELECTRIC DRIVETRAINS + BATTERIES

67% OF TOTAL MARKET IS ALREADY ELECTRIFIED FOR NEW CARS



EU vehicle registration data. 2026 = YTD.

Trucks

FOUR FUNDAMENTAL CHANGES IN ELECTRIC TRUCKING

FUNDAMENTALLY SHIFTING TRANSPORT TO THE ELECTRIC TECHNOLOGY

CHANGE 1

RANGE

CHANGE 2

BATTERIES

CHANGE 3

POWER SOURCE

CHANGE 4

FREIGHT ECONOMICS

CHANGE 1

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5 YEARS TECHNOLOGY IMPROVEMENT

4X RANGE EXPANSION VS. 2021

160 km

2021

175 km

220 km

2022

300 km

2023

370 km

2024

500 km 500 km

2025

600 km 600 km

2026

CHANGE 2

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ELECTRIC TRUCK BATTERY TRANSFORMATION

BATTERY IMPROVEMENTS FUNDAMENTALLY SHIFT ECONOMICS THROUGH 2030

Year	Usable Battery Percentage Best in Class (%)
2023	80%
2024	83%
2025	97%
2026	97%
2027	97%
2028	98%
2029	98%
2030	98%

10x Improvement Unused Efficiency

50% Reduction

62% Reduction

70% Reduction

ELECTRONS CAN BE ECONOMICALLY **PRODUCED, PROCURED AND STORED BY LOGISTICS COMPANIES**

CHANGE 3

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+ PRONE TO DRASTIC FLUCTUATIONS

Country	24 Feb 2026	16 Mar 2026	Change (EUR/l)	Change %
EU-27 average	€1.492	€1.835	+€0.343	+23.0%

CHANGE 3

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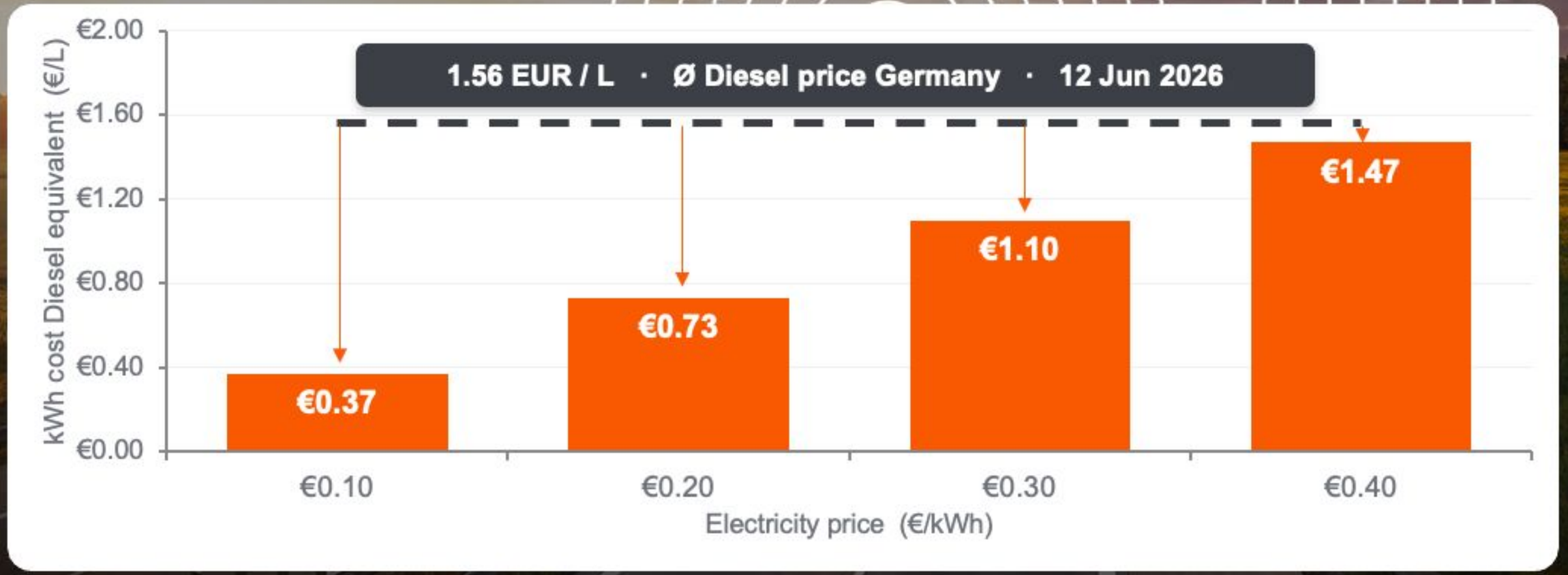
ELECTRICITY POWERS MORE CHEAPLY THAN DIESEL FUEL

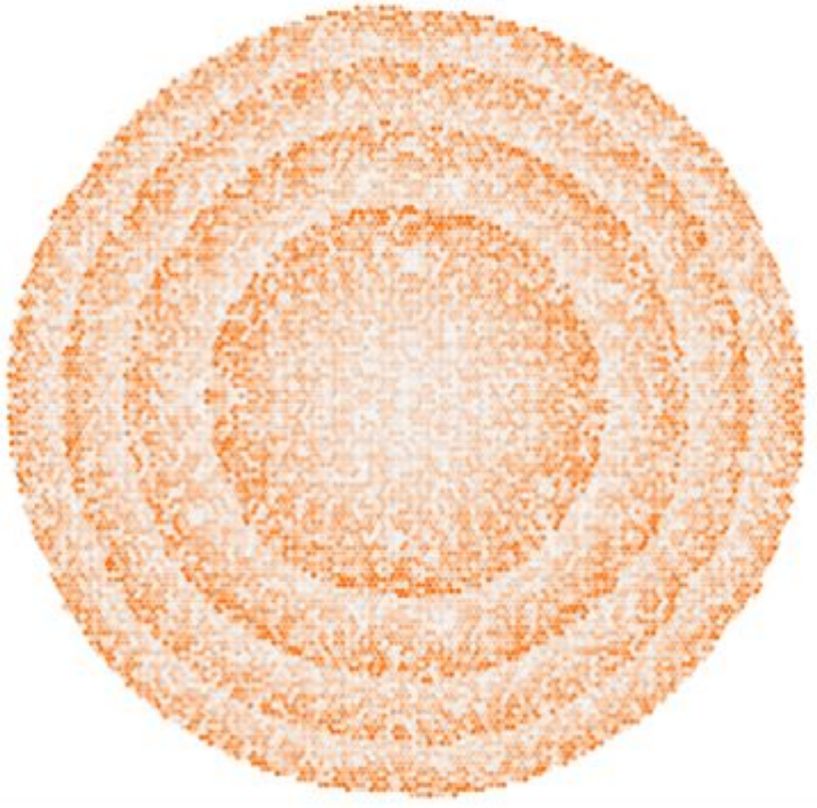
THEY KEY TRUTH TO UNDERSTANDING THE FUTURE OF HEAVY DUTY TRANSPORT



EV Truck Economics

WE CALCULATED ALL THE MAIN COST FACTORS IN 2.9 MILLION SIMULATIONS

DEMONSTRATES PRECISELY THE FACTORS THAT MOVE ELECTRIC OPERATIONS COST VS. DIESEL



2.9 MILLION SIMULATIONS

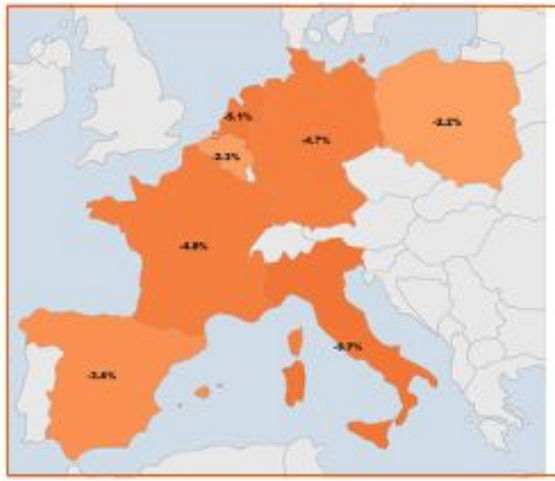
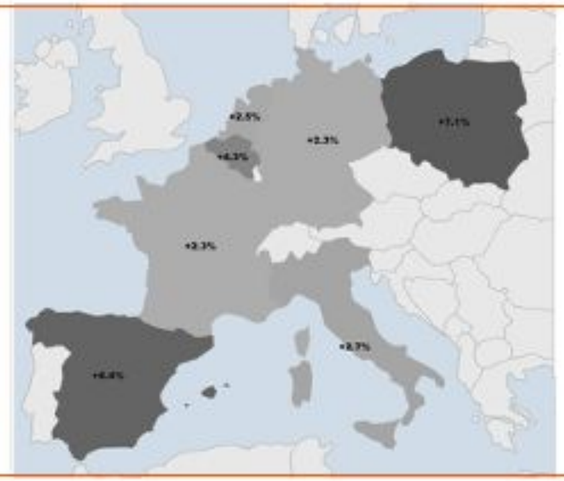
COST FACTOR INPUTS FOR EV AND DIESEL

1. **Road Tolls**
   EV vs Diesel tolls | 0% - 100%
2. **Diesel Price**
   2023, 2024, 2026 Feb | April
3. **Electricity Price**
   €0.05 - €0.50/kWh
4. **Carbon Price**
   0 - 200 EUR/tonne
5. **Driver Cost**
6. **Daily Kilometres**
   240 - 640km range
7. **EV Truck Costs**
   2025 - 2030
8. **7 Countries**

MOST CONSERVATIVE SCENARIOS: NO SUBSIDIES OF ANY KIND: 2025 + 2030

SCENARIO PARAMETERS (Diesel / Electric)

EV ROAD TOLL	100%
CARBON PRICE	€0
DIESEL PRICE	2023-4

	ELECTRICITY €/KWH		
	€0.10	€0.20	€0.30	€0.40
2025				
2030				

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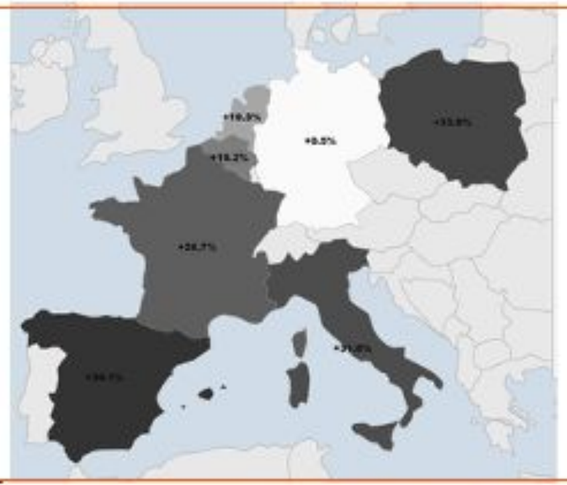
FEBRUARY 2026 & APRIL 2026
EV WINS IN DE + NL | BE + FR IN PLAY

SCENARIO PARAMETERS — Diesel — Electric

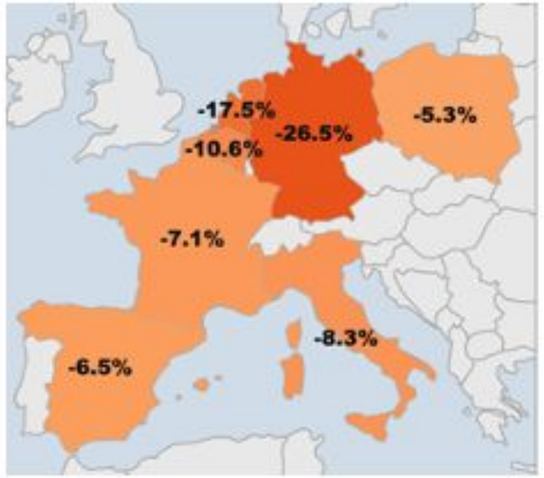
EV ROAD TOLL	By country
CARBON PRICE	€0
DIESEL PRICE	≈Apr 2026

	ELECTRICITY €/KWH			
	€0.10	€0.20	€0.30	€0.40
Feb 2026				
April 2026				

2030 EV WITH CURRENT POLICY BUT CHEAP DIESEL: EVS WINNING MASSIVELY

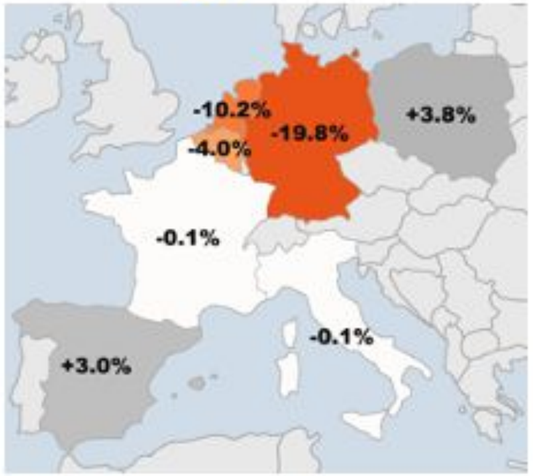
ELECTRICITY €/KWH

€0.10 €0.50



ELECTRICITY €/KWH

€0.05 €0.20 €0.50



WILL TRANSFORM BOTH DOMESTIC AND CROSS BOARDER BUSINESS

SCENARIO PARAMETERS

EV ROAD TOLL

Oth BE NL DE

CARBON PRICE

0 50 200

DIESEL PRICE PER LITRE

2023-4 April 2026

EV TRUCK PRICE

2025 2030

UTILIZATION KM/DAY

240 km 520 km 640 km

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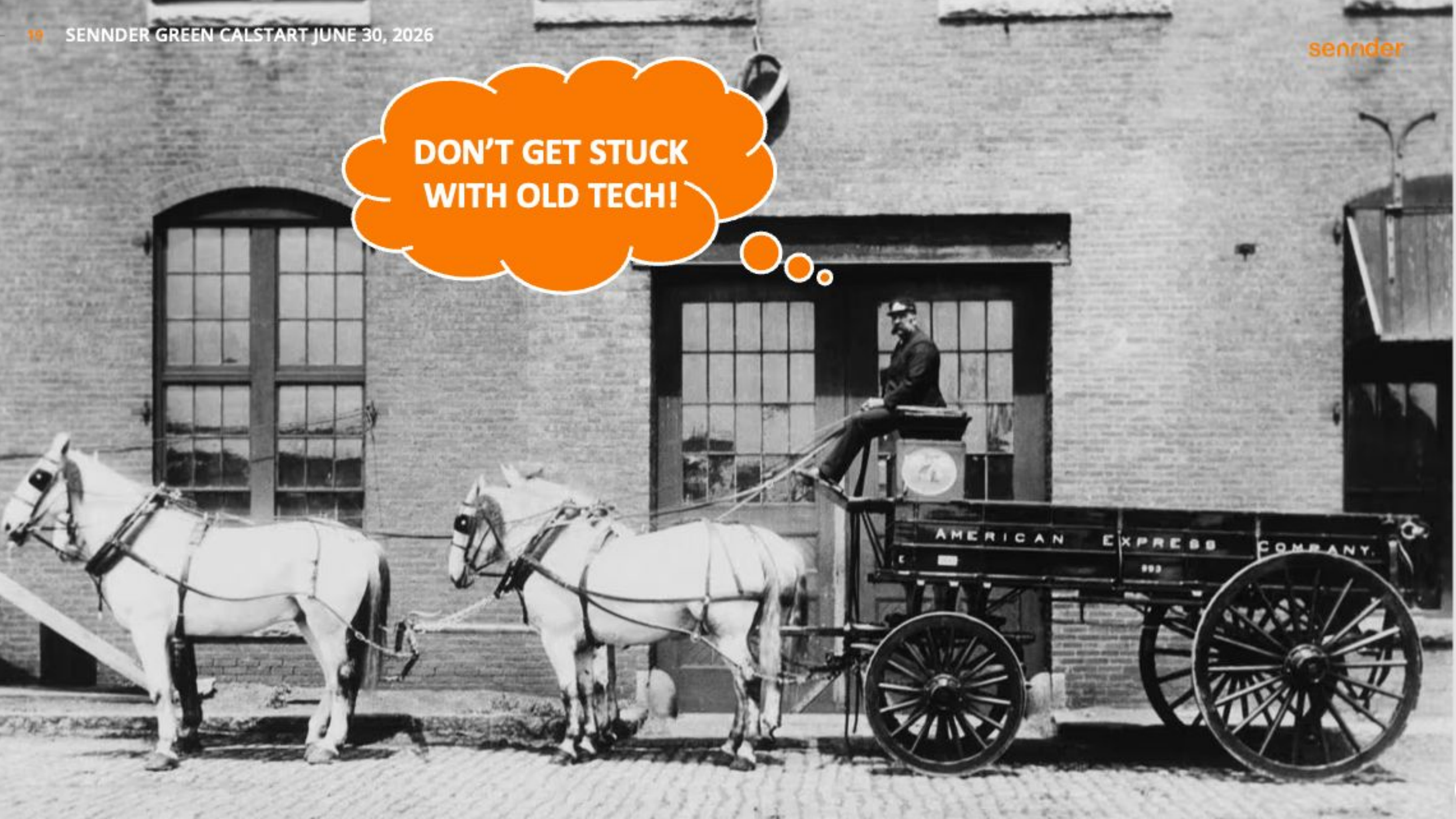

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Thank you

Graham Major-Ex
Executive Director of Green Business and eMobility
graham.major.ex@sennder.com

EUROVIGENTTE ROUNDTABLE

30 June 2026

Thomas Fabian

Chief Commercial Vehicles Officer

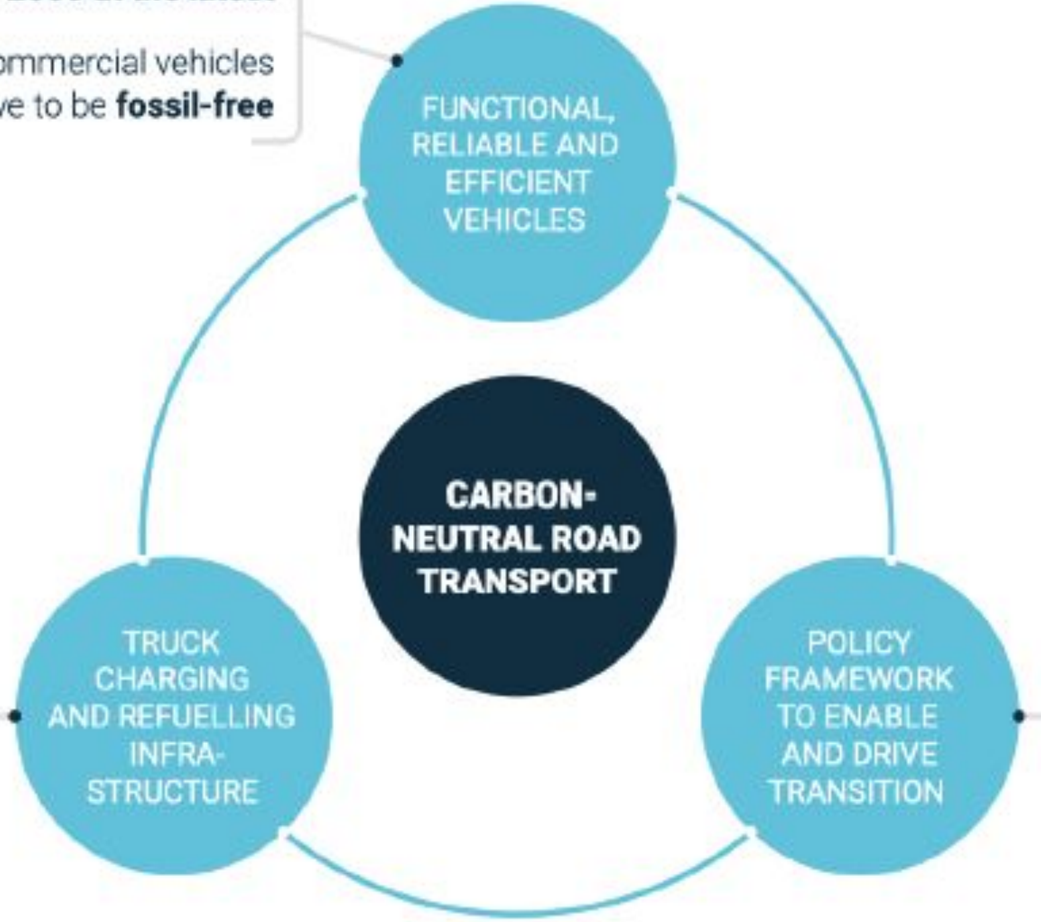
WHO WE REPRESENT

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**

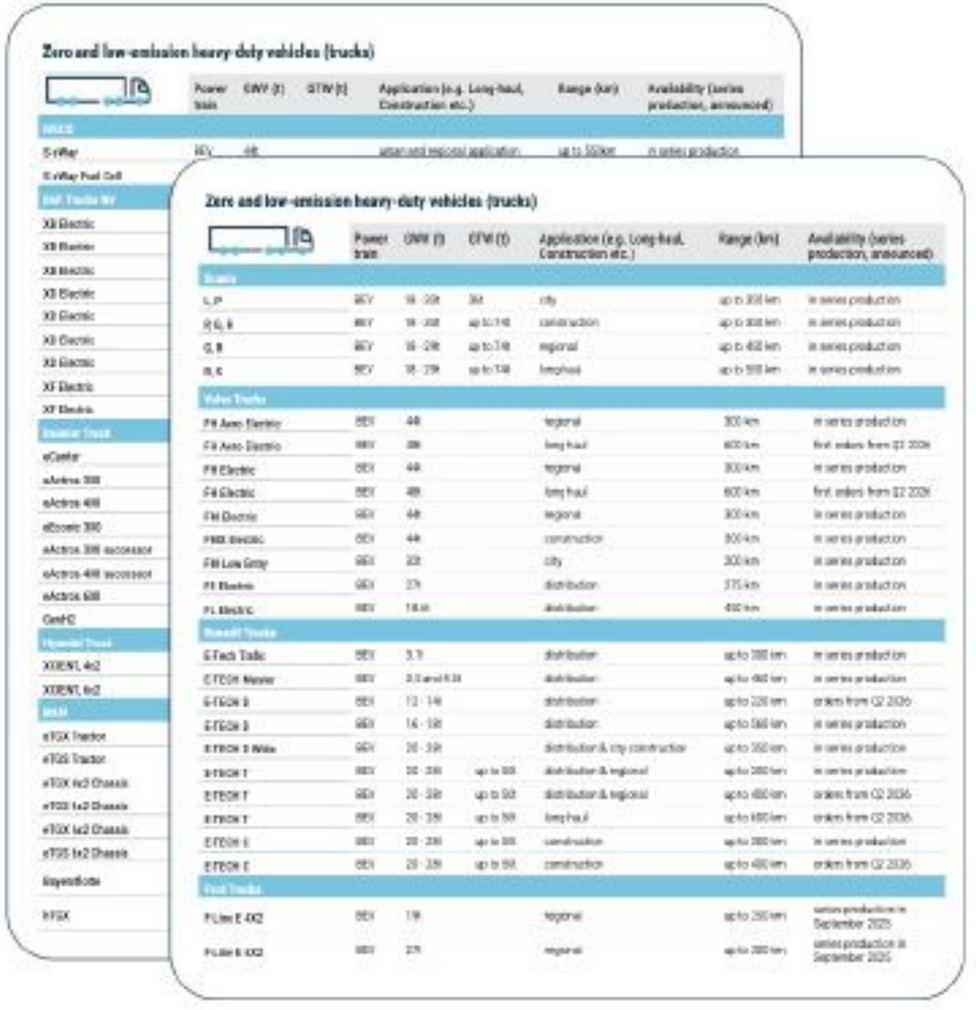
In line with science, an **ambitious carbon price**, which gradually increases to significantly higher levels than today is crucial to drive the deployment of zero-emission technologies

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/

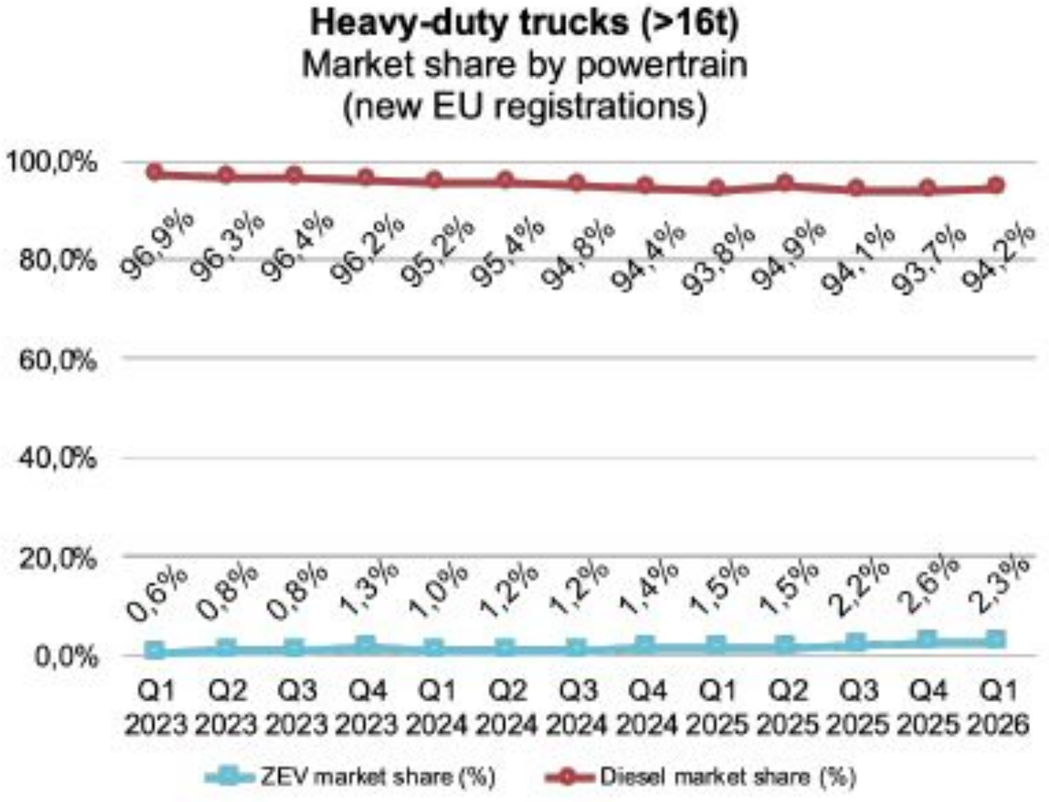


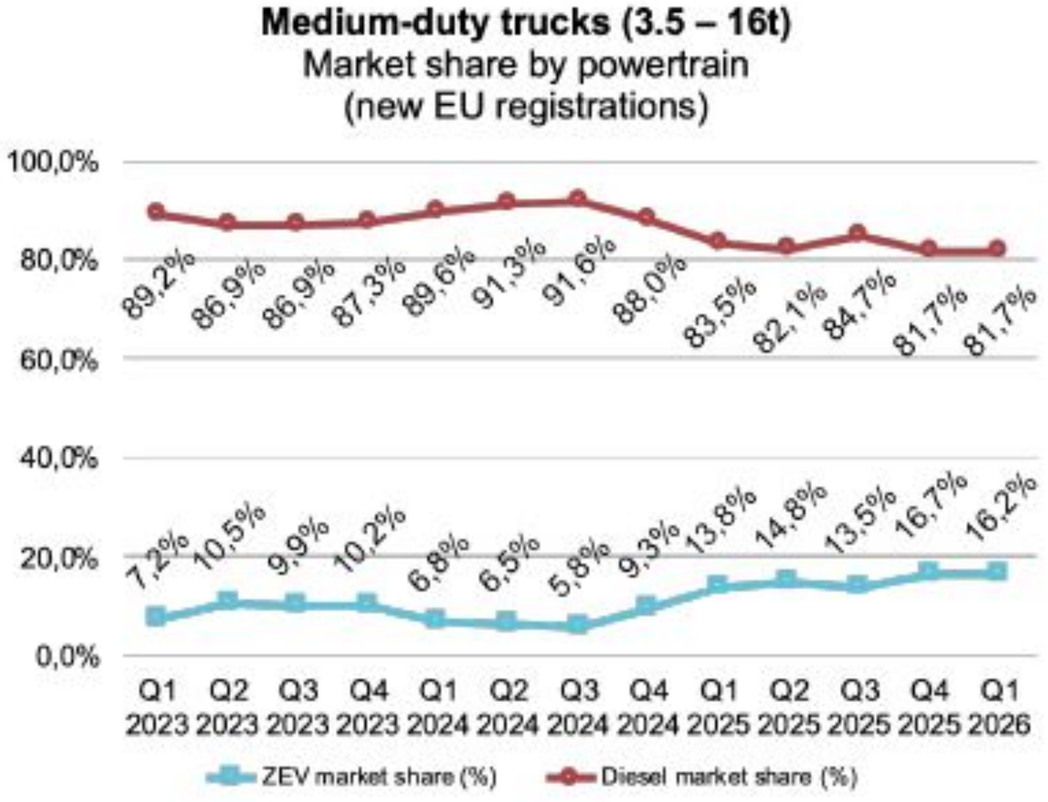
Zero and low-emission heavy-duty vehicles (trucks)

Power train	GVW (t)	GTW (t)	Application (e.g. Long-haul, Construction etc.)	Range (km)	Availability (series production, announced)
Scania					
L P	BEV	18 - 32t	3M	city	up to 300 km	in series production
Q G, R	BEV	18 - 32t	up to 74t	construction	up to 300 km	in series production
Q, R	BEV	18 - 29t	up to 74t	regional	up to 450 km	in series production
R, K	BEV	18 - 29t	up to 74t	long-haul	up to 500 km	in series production
Volvo Trucks					
FH Aero Electric	BEV	44		regional	300 km	in series production
FH Aero Electric	BEV	44		long-haul	400 km	first orders from Q1 2026
FH Electric	BEV	44		regional	300 km	in series production
FH Electric	BEV	44		long-haul	600 km	first orders from Q2 2026
FM Electric	BEV	44		regional	300 km	in series production
FMX Electric	BEV	44		construction	300 km	in series production
FM Low Entry	BEV	32		city	300 km	in series production
FE Electric	BEV	27t		distribution	375 km	in series production
FL Electric	BEV	18 t		distribution	450 km	in series production
Renault Trucks					
E-Tech Tractor	BEV	3.1t		distribution	up to 300 km	in series production
E-TECH Master	BEV	3.5 and 4.2t		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 - 19t		distribution	up to 360 km	in series production
E-TECH D Wide	BEV	26 - 32t		distribution & city construction	up to 350 km	in series production
E-TECH T	BEV	26 - 32t	up to 90t	distribution & regional	up to 300 km	in series production
E-TECH T	BEV	26 - 32t	up to 90t	distribution & regional	up to 450 km	orders from Q2 2026
E-TECH T	BEV	26 - 32t	up to 90t	long-haul	up to 600 km	orders from Q2 2026
E-TECH C	BEV	26 - 32t	up to 90t	construction	up to 300 km	in series production
E-TECH C	BEV	26 - 32t	up to 90t	construction	up to 450 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 200 km	series production in September 2025

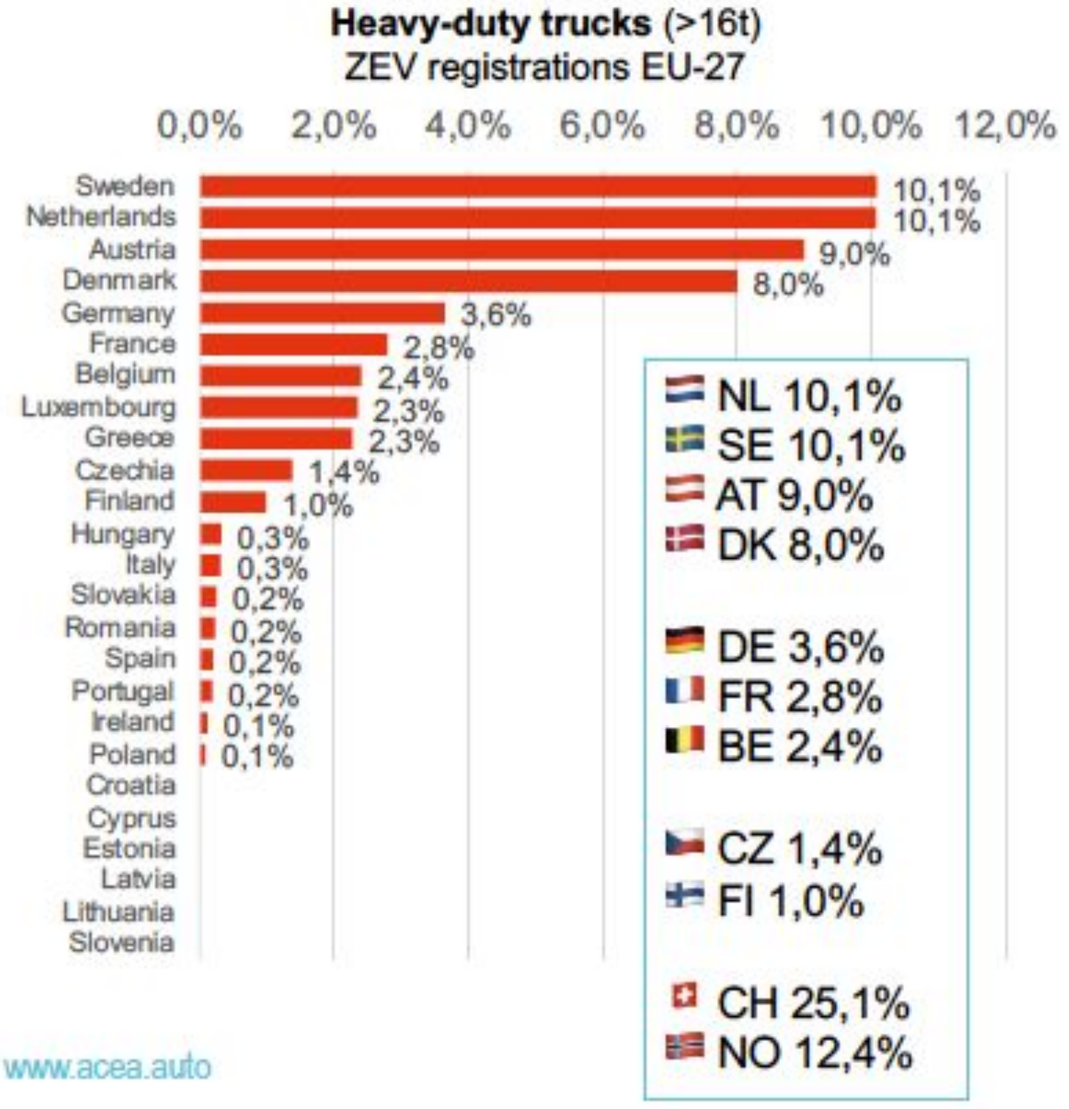
ZEV UPTAKE: PROGRESS STILL TOO SLOW

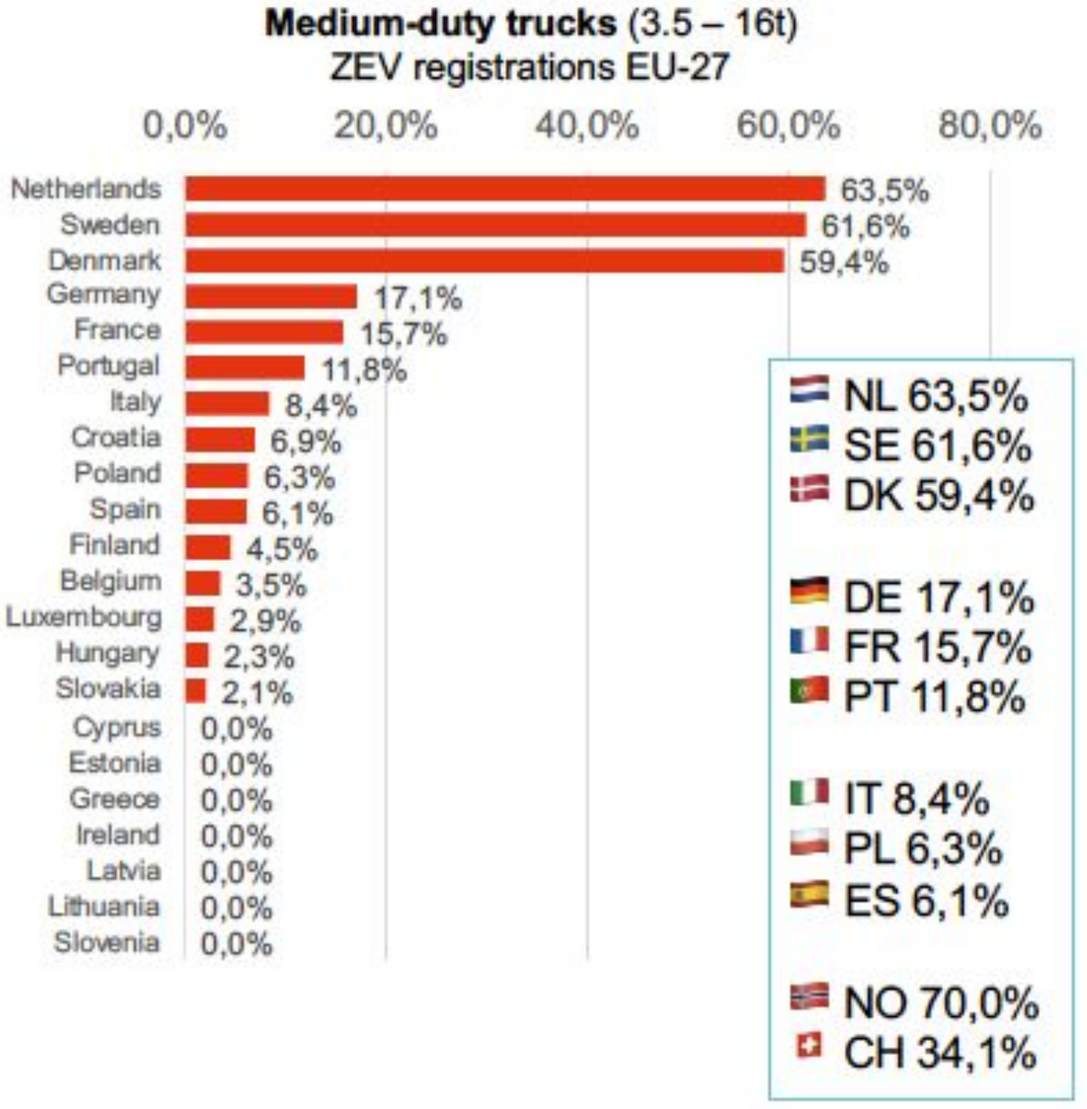
Q1 2026: 2.3% HDV, 16.2% MDV





EUROPE'S ZEV MARKET (Q1 2026)

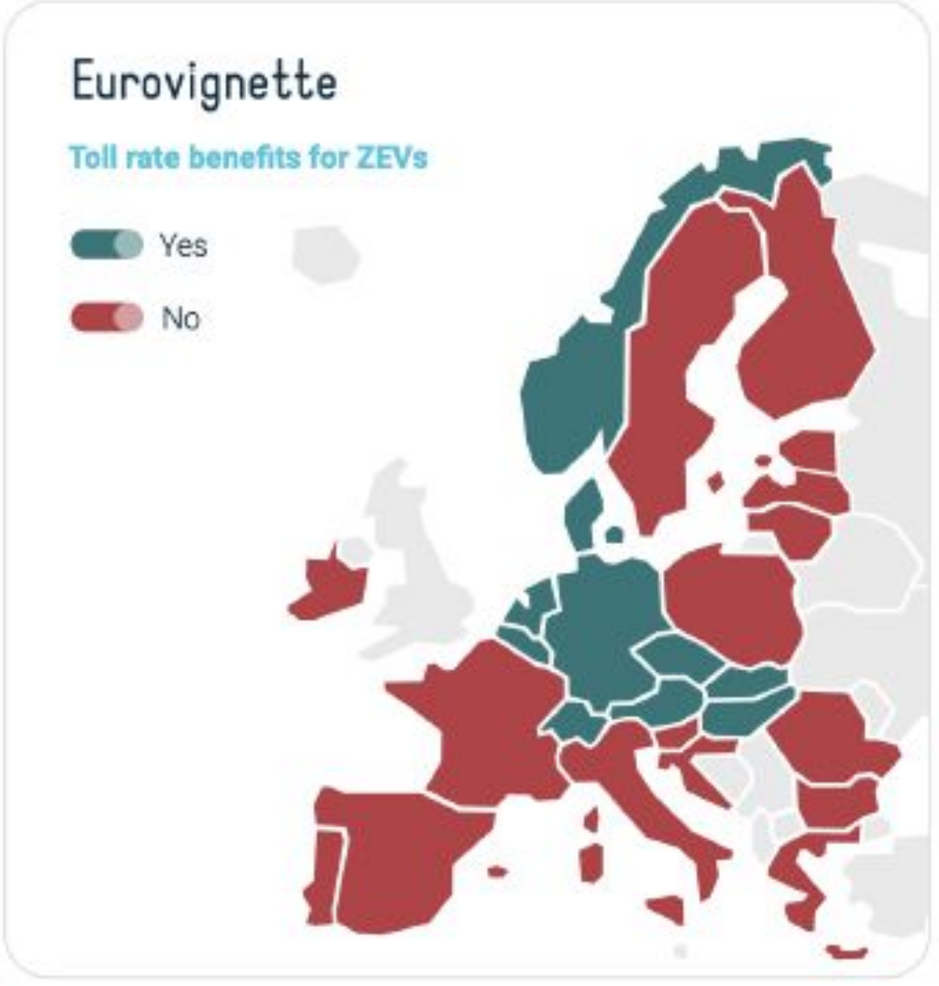




COST PARITY FOR ZEV IS ESSENTIAL TO UNLOCK THE TRANSITION

- **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**
  - CO2-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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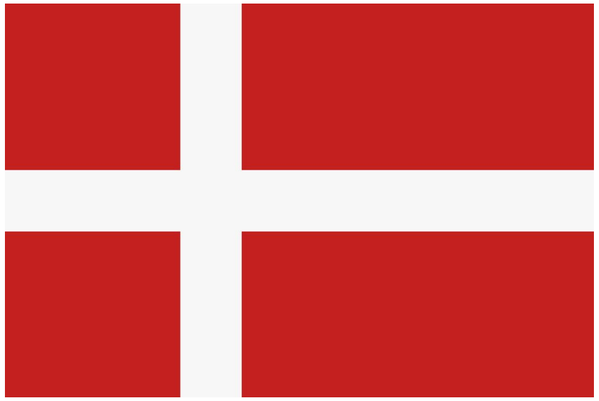
Breakout Discussions

Room 1: Austria

Moderator: Marrida Di Giroiamo

Room 2: The Netherlands

Moderator: Ricardo Garcia Coyne



Room 3: Denmark

Moderator: Adrian Sema Tamez

Room 4: Non-EU

Moderator: Albert Alonso-Villar

FOCUS:

- Key barriers and solutions
- National opportunities
- Peer exchange & practical insights

Moderator Summaries

Marida Di Girolamo
EV100 Climate Group

Ricardo Garcia Coyne
CALSTART Drive to Zero

Adrian Serna Tamez
CALSTART Drive to Zero

Albert Alonso-Villar
ICCT

Takeaways

Moderator:

Giacomo Migliore

Policy Officer, Directorate-General for Mobility and Transport

European Commission

NEXT STEPS

- DG MOVE July 2
- ECTA event July 7

Contact: Sita Holtslag
sholtslag@calstart.org