

# STATISTICAL REPORT 2017

## by NGVA Europe



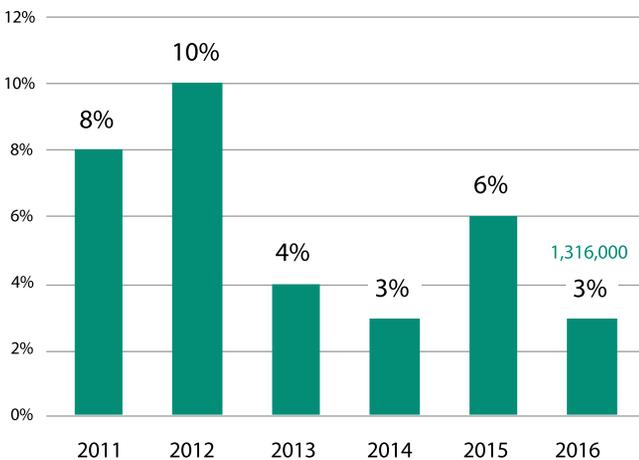
### MONITORING MARKET GROWTH

NGVA Europe has collected statistics and data on natural gas vehicles annually since 2010. Key statistical data includes: the number of natural gas vehicles; the number of public and private refuelling stations (CNG, L-CNG and LNG) and market analysis. Also included are the annual CNG and LNG consumption rates and share of biomethane. Further information is presented in this year's first statistic publication, whereas current and historical data is available to all NGVA Europe members.

THE 2017 EDITION OF THE STATISTICAL REPORT, EDITED AS A PUBLICATION FOR THE FIRST TIME, IS A COMPILATION OF THE DATA AVAILABLE AT THE END OF THE YEAR 2016. THE DATA COMES VIA THE NATIONAL CONTACT POINTS, MAINLY NATIONAL NGV ASSOCIATIONS.

### MARKET DEVELOPMENT

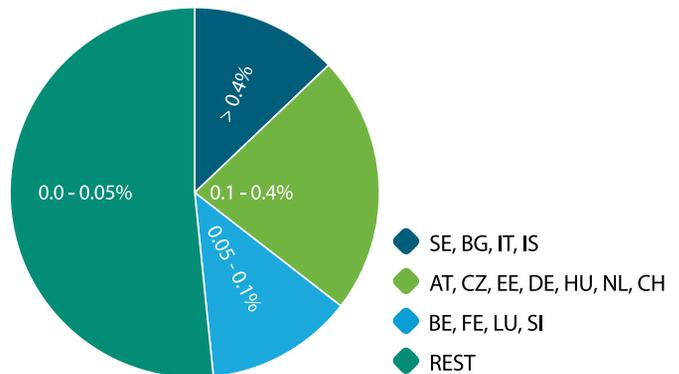
MARKET DEVELOPMENT NGV EU + EFTA (%)



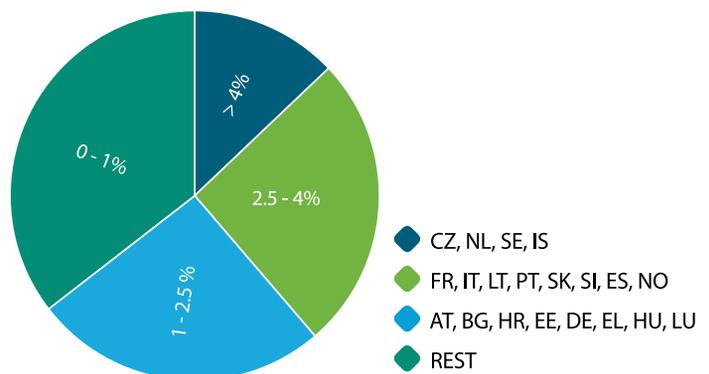
In 2016, the total number of natural gas vehicles (NGVs) on European roads amounts to 1,316,000. This is a rise of 3% market development compared with 2015.

### MARKET PENETRATION

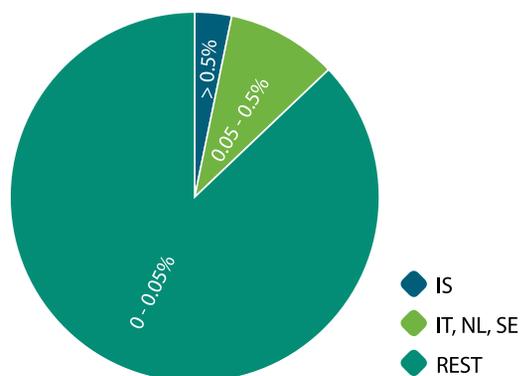
MARKET PENETRATION NGV PASSENGER CARS EU + EFTA (%)



MARKET PENETRATION NGV BUSES EU + EFTA (%)



MARKET PENETRATION NGV TRUCKS EU + EFTA (%)



Source: NGVA Europe Statistics 2016

Market penetration means the total number of NGVs in a sector, divided by the total amount of vehicles running on all fuels in the same country. It shows where NGVs are most established per sector (passenger cars, buses and heavy-duty vehicles).

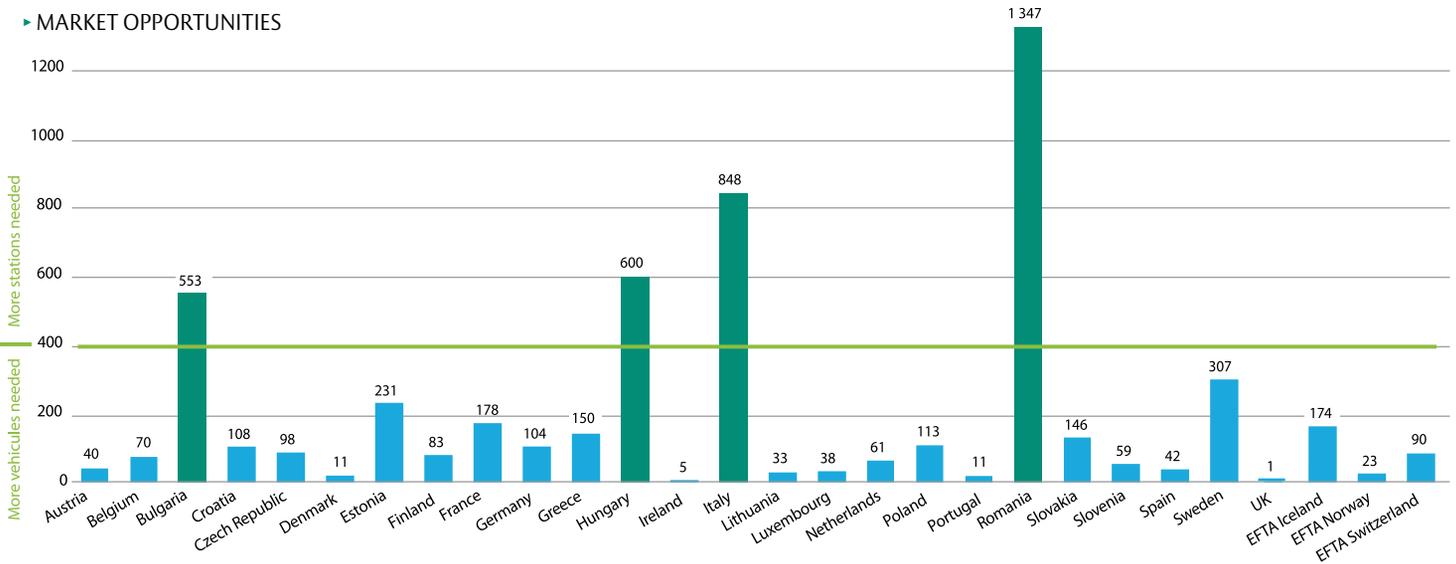
The market penetration for cars in 2016 is the highest in Sweden, Bulgaria, Italy and Iceland with a share above 0.4%.

Sweden outperforms all other countries on the bus market share with 16%. Other well performing countries were Czech Republic, The Netherlands and Iceland.

For trucks, Iceland holds the highest market penetration, with more than 0.5%. It is important to note that in Iceland, despite the high penetration, the total vehicle market is very small in comparison with other EU countries. Nevertheless, considering the fact that Iceland is a remotely situated country and running on 100% biomethane, the market uptake is strong.

Interestingly, Sweden which performs best in the bus market also has a strong heavy-duty and passenger car markets. There is an urgent need for more trucks running on gas in all other countries to go along with the fast development of the refueling infrastructure.

▶ MARKET OPPORTUNITIES



Source: NGVA Europe Statistics 2016

▶ GENERAL OVERVIEW

Country	NGV Stations	NGV Vehicles
Austria	172	7084
Belgium	78	5365
Bulgaria	125	69820
Croatia	2	318
Cyprus	-	-
Czech Republic	143	15500
Denmark	15	327
Estonia	6	1504
Finland	29	2375
France	60	14548
Germany	885	93964
Greece	10	2210
Hungary	10	6314
Ireland	1	8
Italy	1186	1001614
Latvia	-	-
Lithuania	3	343
Luxembourg	7	306
Malta	-	-
Netherlands	183	11020
Poland	28	3600
Portugal	19	570
Romania	1	1390
Slovakia	11	1893
Slovenia	4	335
Spain	66	5797
Sweden	173	54379
UK	38	310
EFTA Iceland	5	1236
EFTA Norway	7	745
EFTA Switzerland	141	12912
Total EU + EFTA	3408	1315787

Source: NGVA Europe Statistics 2016

The graph above showcases the average number of natural gas passenger cars per CNG station for the country in focus.

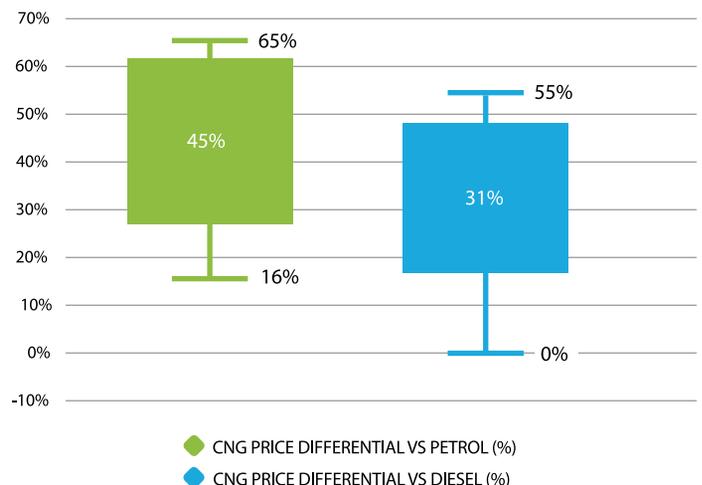
There are four countries that outperform the rest of Europe when it comes to vehicles per station: Bulgaria, Hungary, Italy and Romania.

This could be interpreted as an opportunity for CNG station developers to invest in these specific markets.

On the contrary, when there are fewer vehicles per station this suggests that the infrastructure is already developed and ready to be used.

The way to develop forward would be to promote and uptake of more NGVs and therefore achieve better station utilisation.

▶ HOW FAVOURABLE IS THE PRICE DELTA ON GAS?



Source: NGVA Europe Statistics 2016  
cont. on p.12 ▶

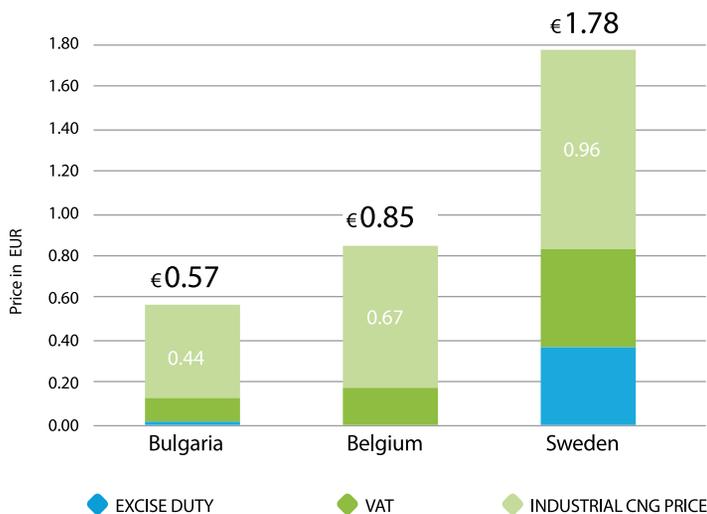
### ✓ CNG PRICE DIFFERENCE VS DIESEL AND PETROL

The average price in Europe for CNG is 0.99€/kg, which is 48% lower than petrol and 31% lower than a diesel, making it an economic fuel for transport.

Even though NGVs are, on average, more expensive to buy than conventionally-fuelled vehicles, the initial cost is offset by the lower CNG price.

In Belgium and The Czech Republic, the highest CNG price difference between petrol and diesel respectively can be found (65% and 55%), while the lowest CNG price difference for both fuels are in Sweden (16% and 0%).

Source: NGVA Europe Statistics 2016



### ✓ CNG PRICE COMPOSITION: BEST AND WORST CASE

The price of CNG differs throughout the EU due to the variable industrial CNG price, VAT and excise duty. Three different examples: Bulgaria, Belgium and Sweden were chosen to demonstrate this variability and are shown on the graph above.

The lowest average CNG price can be found in Bulgaria with 0,57€/kg. The reason is that the industrial price is among the lowest in EU of 0,44€/kg. In comparison with 0,67€/kg in Belgium or 0.96€/kg in Sweden.

In Belgium there is no excise duty for CNG, effectively meaning that drivers save 0,12€/kg on average, in comparison with the other countries. In Sweden despite the CNG price being the highest in the EU, the market share of NGVs is still above the EU average, proving the viability of natural gas as a fuel.

Source: ngva.eu



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Провода выпускаются двух диаметров d.6 и d.8 с номером официального утверждения: E7 67R01 00951.25.

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