



Press release

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## **Commercial vehicles: the French Bodywork Federation launches the pan-European survey Vision'AIR**

The exceptional situation experienced by our industry and the economic difficulties arising therefrom have increased the needs of professionals to anticipate their markets. This is what led to the initiative by the French Bodywork Federation and its Chairman Patrick Cholton, to invest in an exceptional multi-client study on the future of the energy mix in commercial vehicles in Europe, with forecasts running up to 2040. This global study will be conducted by Le Bipe and BDO Advisory, long-standing partners of FFC.

For the first time in Europe, the Vision'AIR study will provide an analysis of the powertrain mix from various perspectives (by country, by segment, by year, by major vehicle category) up to 2040, together with their carbon contribution. This will give all industry professionals the opportunity to obtain an overview of their future markets up to 2040 and thereby align themselves with the targets of the European Commission.

In terms of working methodology, Le Bipe and BDO Advisory will draw up a complex projection model incorporating masses of data supplied by the contributors to the survey: HGV manufacturers, LCV manufacturers, carriers, shippers, etc.

The aim is to aggregate, within the model, fleet forecasts (the total cost of ownership, the powertrain mix by brand, strategies, the changes to infrastructure and tax rules in each country, etc.) then correlate them with structural data from the industry in Europe's 27 countries. Here, reference can be made for example to the consequences of the introduction of VECTO, or the use of vehicles, compatibilities between different energy sources and economic and legal scenarios.

In November 2021, the Vision'AIR survey will for the first time offer an accurate picture, based on reliable projections, of the energy mix in each European country up to 2040. The Vision'AIR modelling tool will also allow comparisons to be made between the total cost of

each segment for a given use. The segment capable of the required use and displaying the lowest Total Cost of Ownership will thus be awarded a larger market share by the model.

The excess cost arising from the use of alternative fuel will also be closely analysed. The diesel-powered combustion engine vehicle is today the industry reference in all heavy duty vehicle missions. As alternative fuels are unable to meet the same demands according to uses, the replacement of a diesel fleet by a fleet running on alternative energy (gas, electricity, hydrogen) will require adjustments to be made to the number of vehicles. Vision'AIR will take this constraint into account through an excess cost which will vary depending on the ability of an alternative energy vehicle to carry out the mission.

The study will be officially presented on 17 November 2020 at the Lyon Gerland Matmut Stadium, as part of the Industry Meetings. The results are expected no less than a year later, at the trade show SOLUTRANS, owned by FFC. Vision'AIR will then be updated every two years.

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