Ein Projekt der

dena

Plattform Nachhaltiger

Schwerlastverkehr

# Platform on sustainable heavy duty trucks

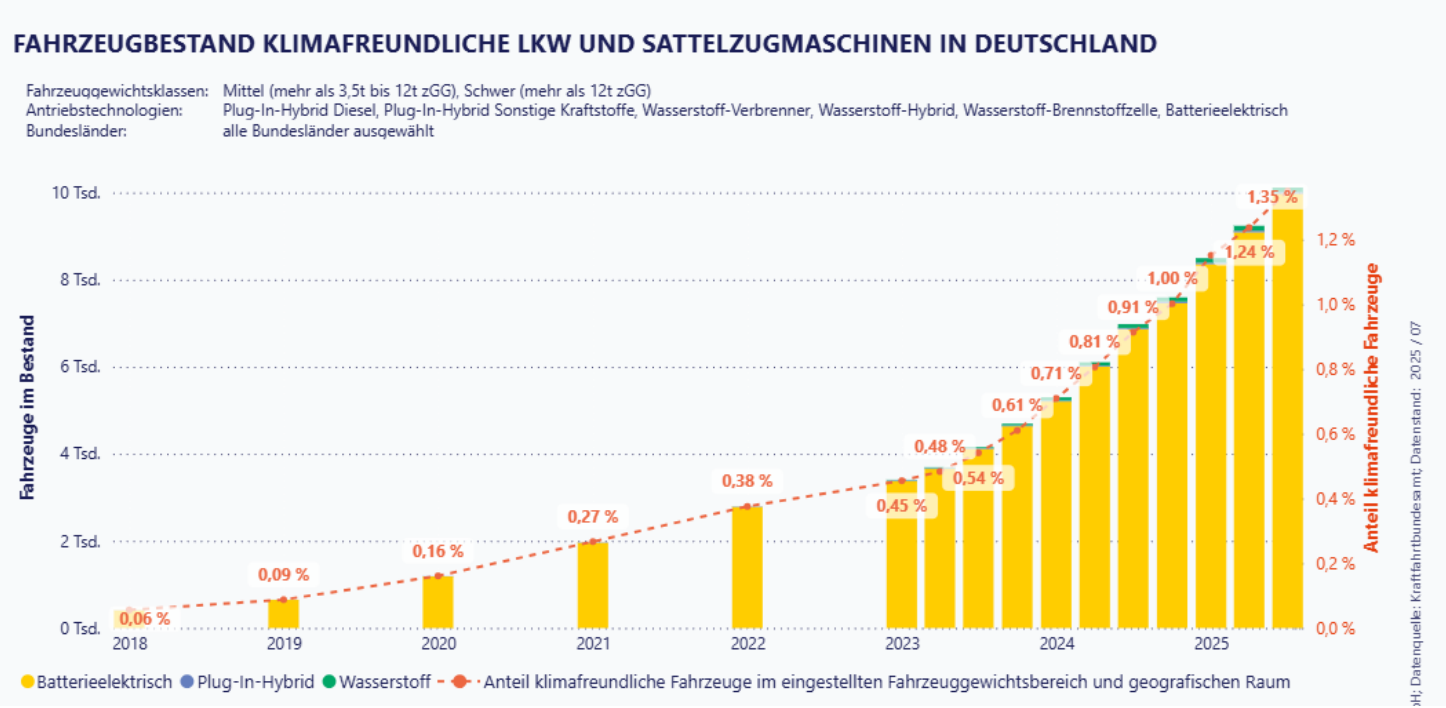
Advancing the ramp-up of sustainable HDVs, fuel alternatives and infrastructure

# HDV market

| |  |  |  |  |
|---|---|---|---|---|
| Energy carrier | **Green electricity** | **Green hydrogen** | **Bio-LNG / Bio-CNG** | **HVO100** |
| Production | Renewable Energy | Electrolysis | Anaerobic digestion (manure, agricultural residues, food waste) | Hydration (waste fats, vegetable oils, and animal fats.) |
| Propulsion | Battery Electric Vehicle (BEV) | Fuel Cell Electric Vehicle (FCEV)<br>$H_2$-ICE* | Gas-ICE* | Diesel-ICE* |

*internal combustion engine

# HDV market

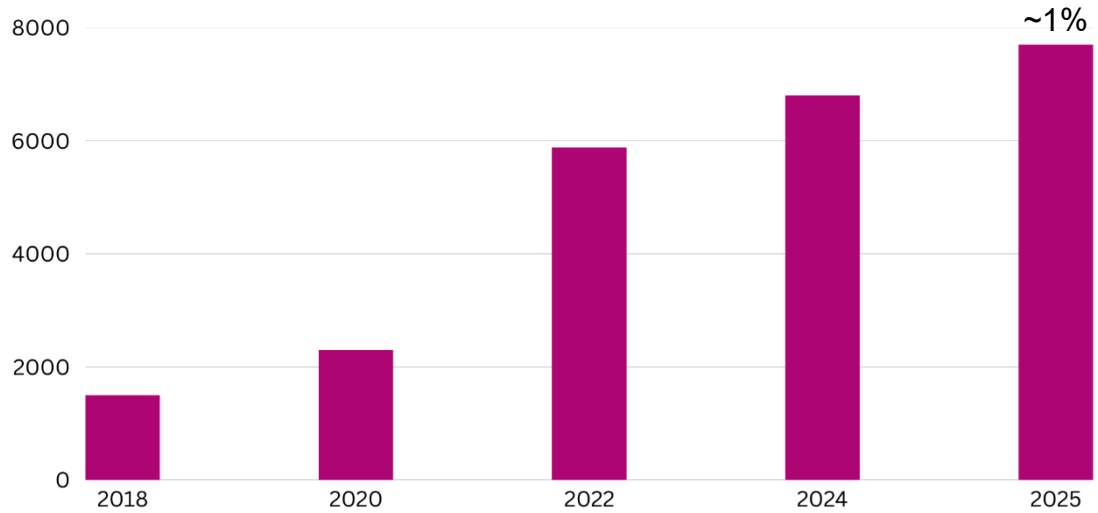



Source:NOW

# HDV market

## Estimated number heavy CNG/LNG trucks (>12 t)

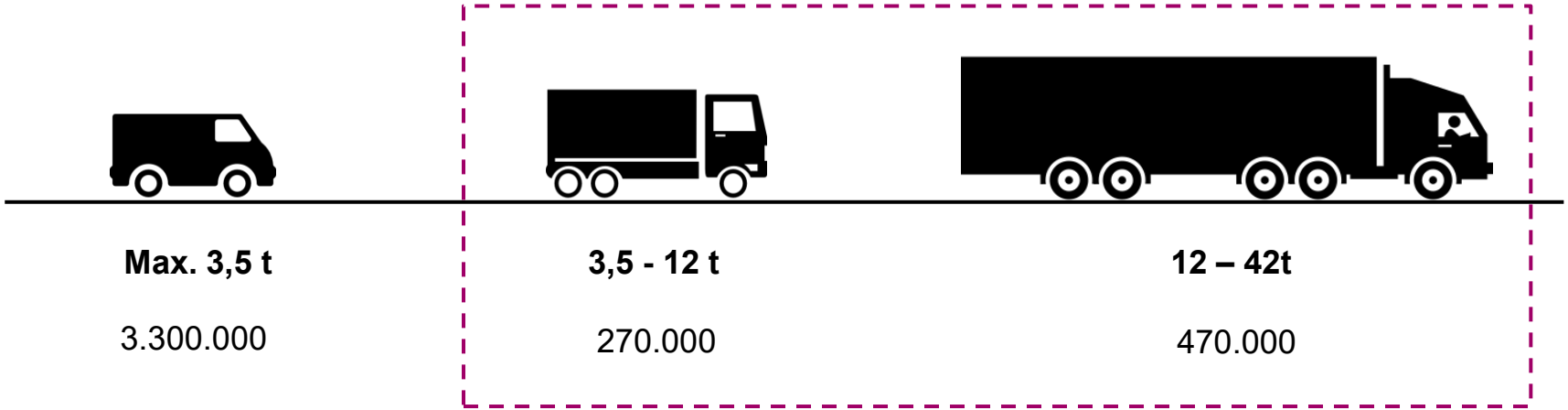
01.01. of the respective year




Source:NOW

# HDV market

**Around 98 %**
of heavy duty vehicles
run on diesel.



| Max. 3,5 t | 3,5 - 12 t | 12 – 42t |
|---|---|---|
| 3.300.000 | 270.000 | 470.000 |

# Market Survey 2025

**Sentiment and Data Basis on Investment Readiness in Alternative Powertrains for Heavy-Duty Transport**

**Objective:** Identify the biggest challenges and opportunities faced by users regarding the sustainable transformation of their vehicle fleets

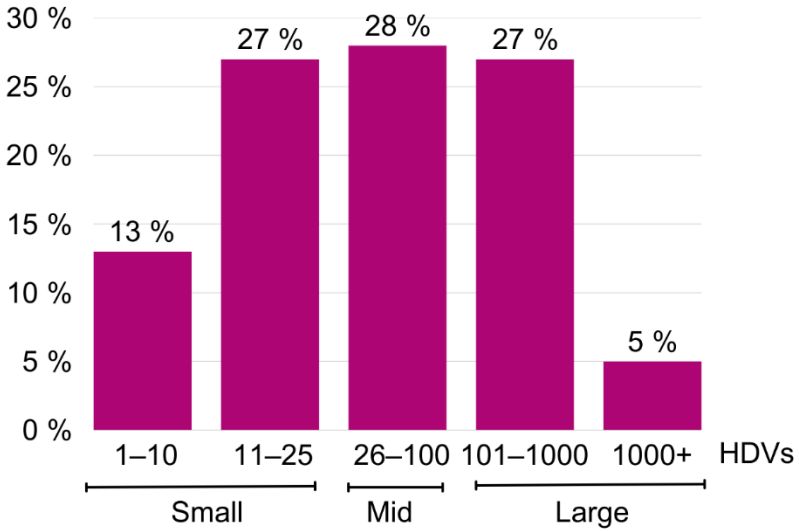
**Survey Subjects:** Logistics companies in Germany; 82 responses (not representative)

**-> Find publication here:** https://www.dena.de/infocenter/marktbefragung-zur-anschaffung-nachhaltiger-lkw-in-der-logistik/

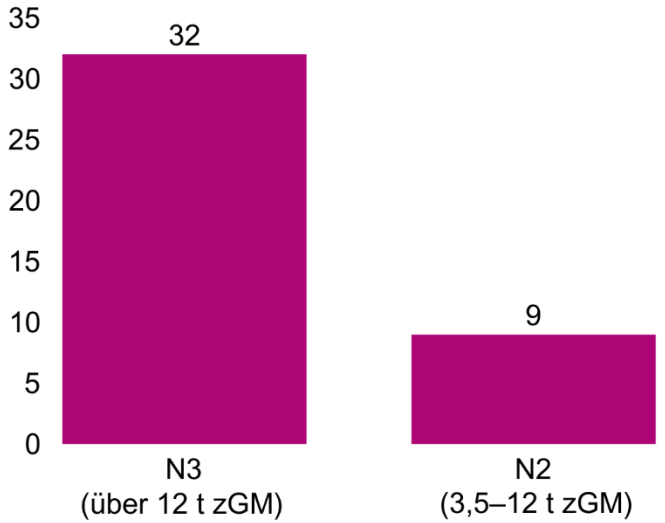
DSLV Bundesverband Spedition und Logistik | RWTH AACHEN UNIVERSITY | Mendel University in Brno | ifa Institut für Automobilwirtschaft | HOCH SCHULE OFFEN BURG

# Participant profile

**What is the total size of your vehicle fleet?**

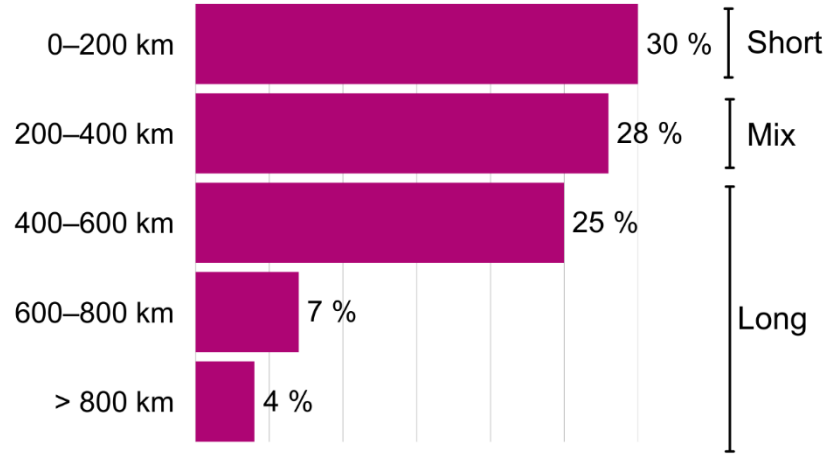



**Approximately how many vehicles do you own in each category (median)?**



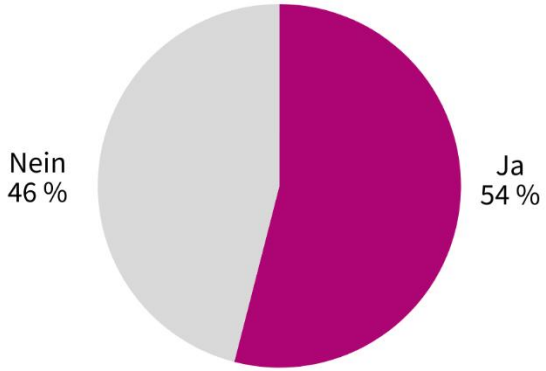
# Participant profile

**What percentage of your daily mileage is made up by each part of your route profile?**



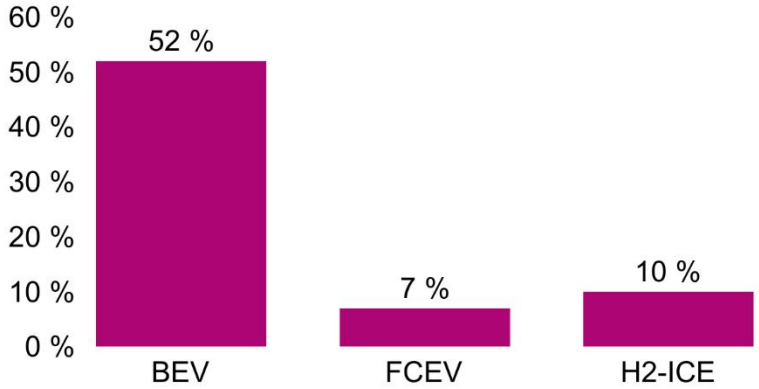
# Zero Emission Vehicles

**Do you have concrete plans to invest in zero-emission vehicles within the next seven years?**



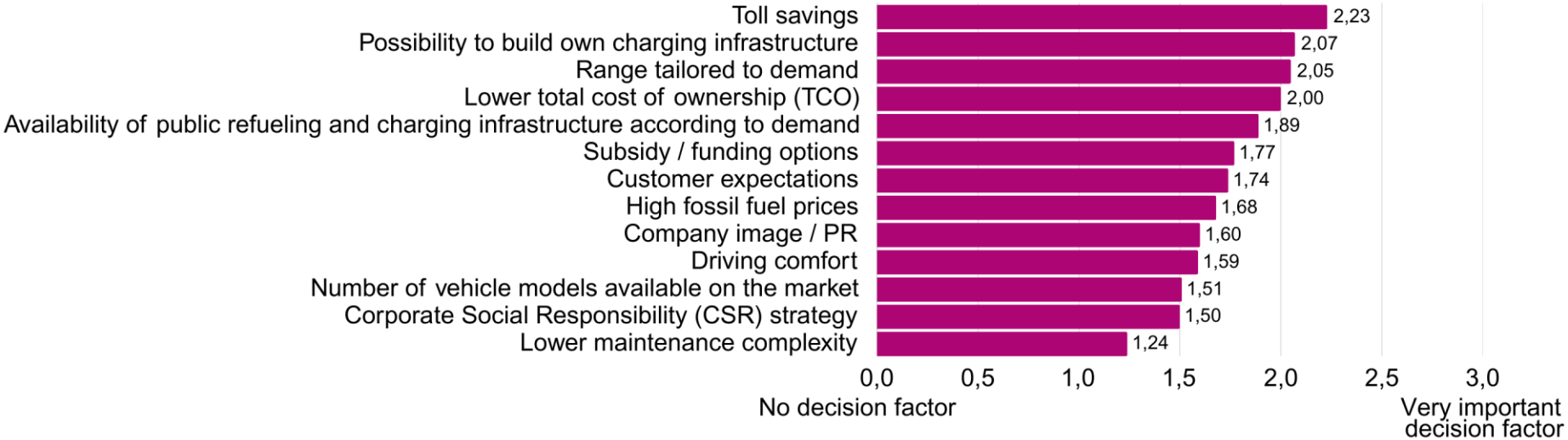

**Broken down by propulsion type:**

The chart illustrates the share of 82 companies that plan to invest in the respective propulsion technologies.



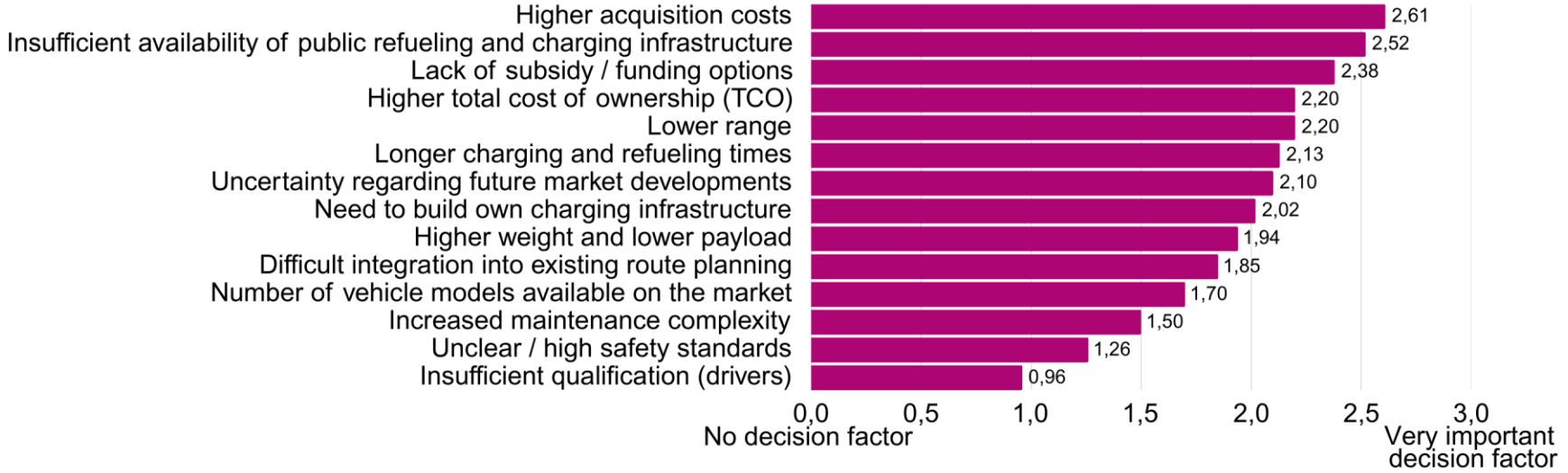
# Zero Emission Vehicles

**What reasons, in your view, currently support a future investment by your company in zero-emission vehicles?**



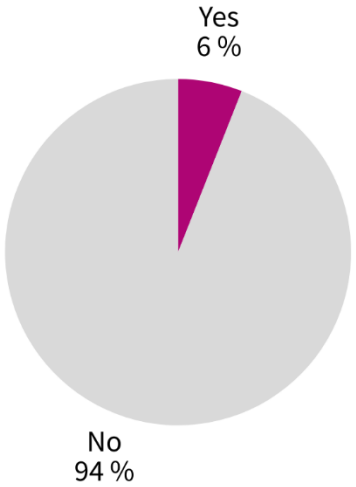
# Zero Emission Vehicles

**What reasons, in your view, currently argue against a future investment by your company in zero-emission vehicles?**



# Gas vehicles

**Do you have concrete plans to invest in gas-powered vehicles within the next seven years?**

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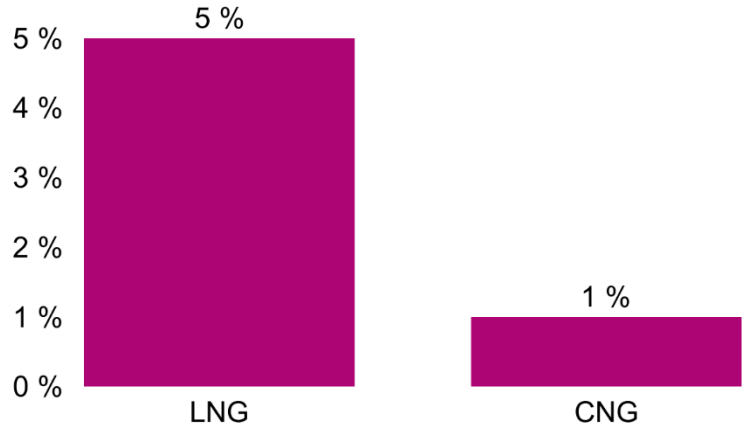

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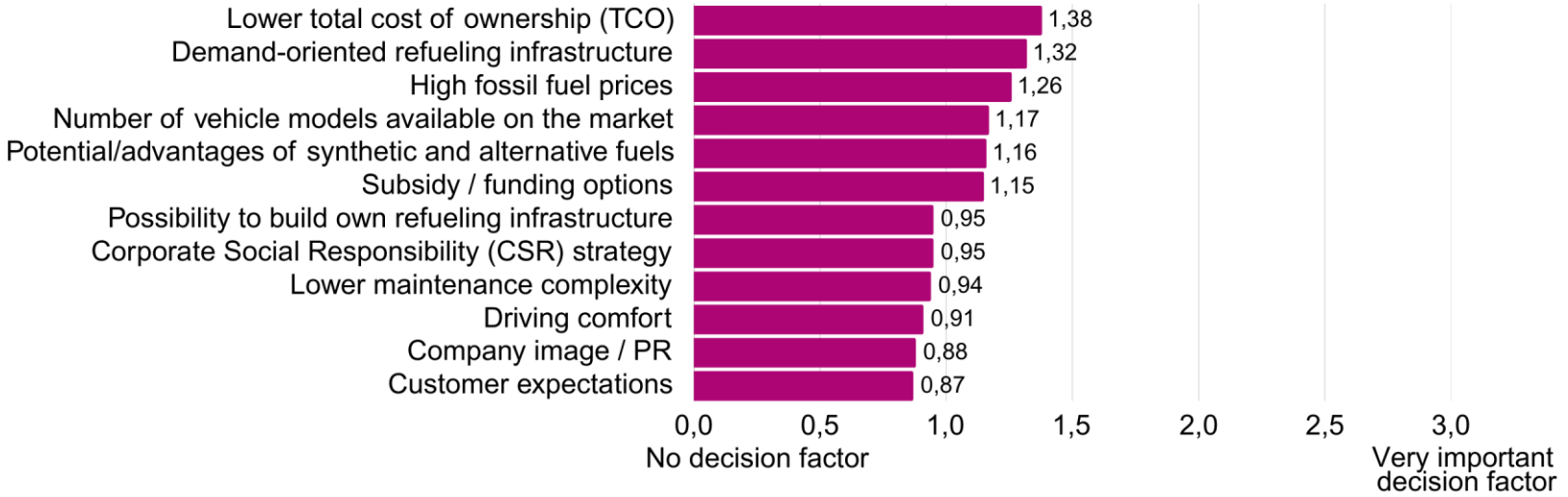

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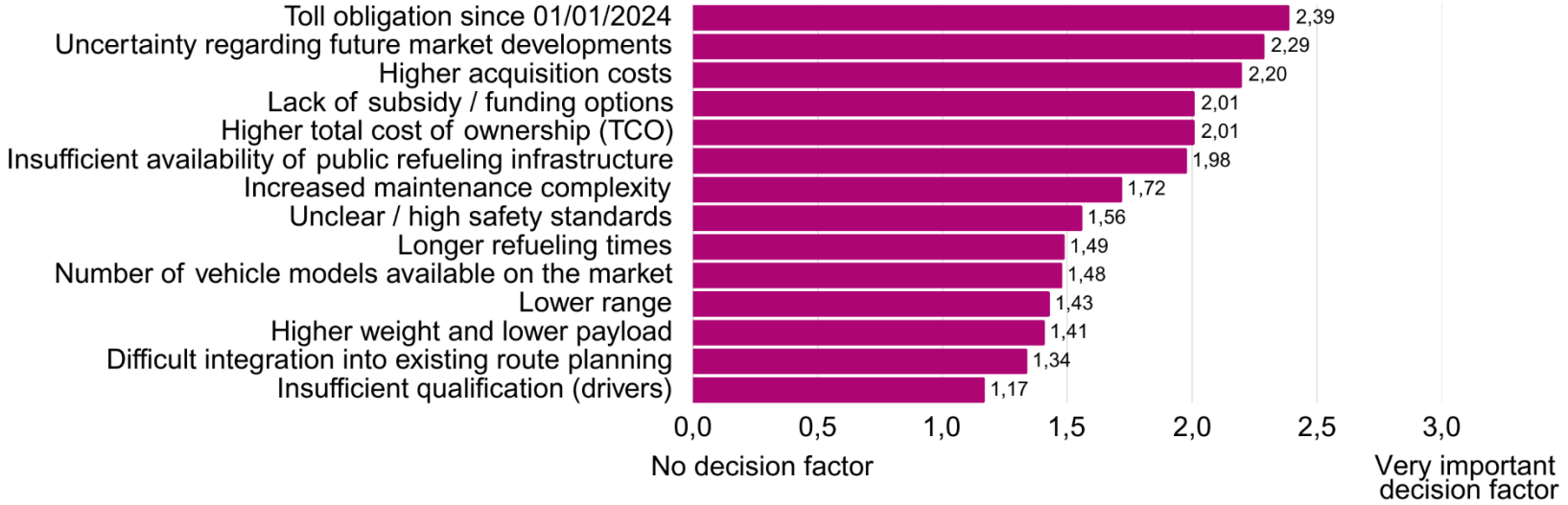
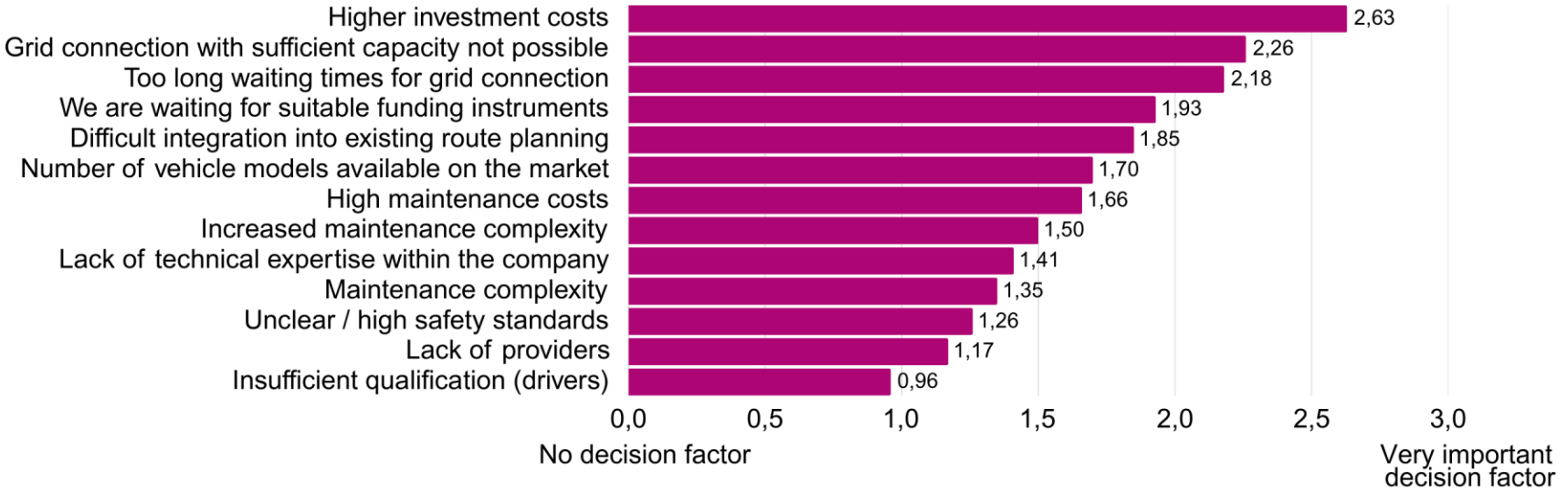


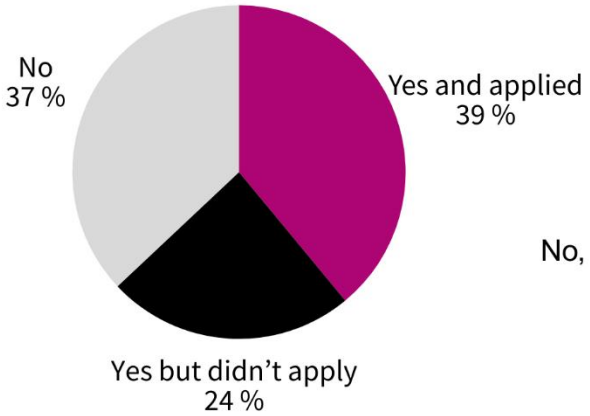
# Charging infrastructure

**What factors do you consider obstacles to building your own charging infrastructure?**

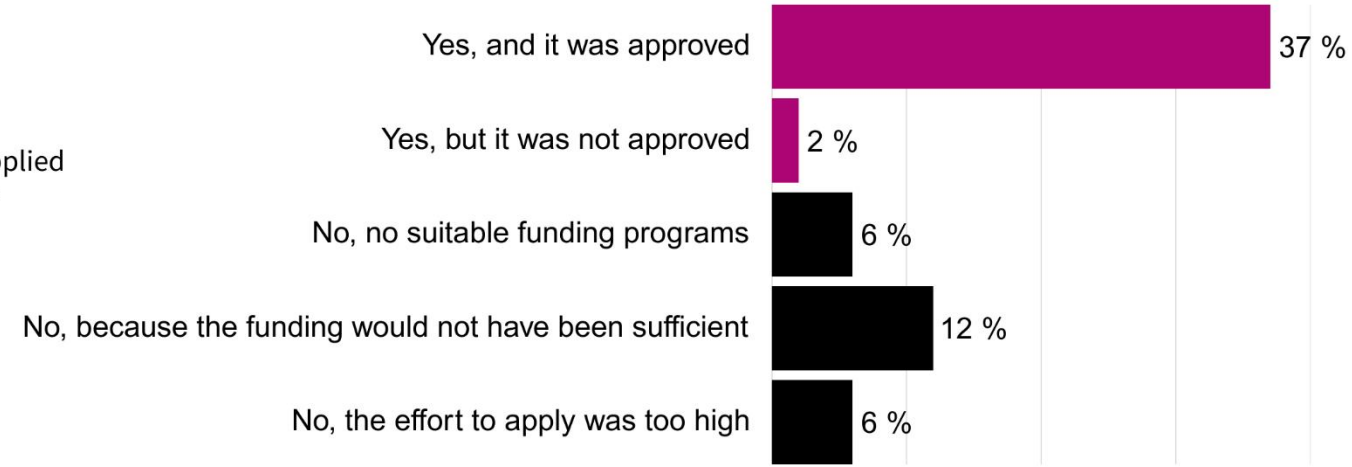


# Charging infrastructure

**Have you ever looked into government grants for the acquisition of charging infrastructure?**



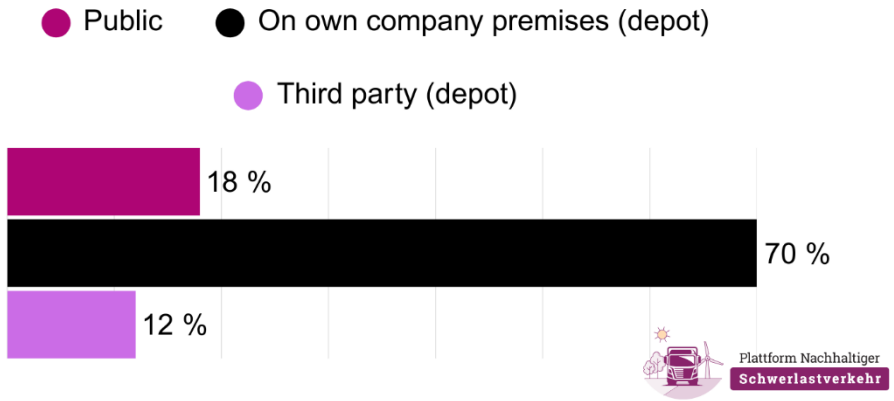

**Have you ever applied for government funding for the acquisition of charging infrastructure?**



# Charging infrastructure

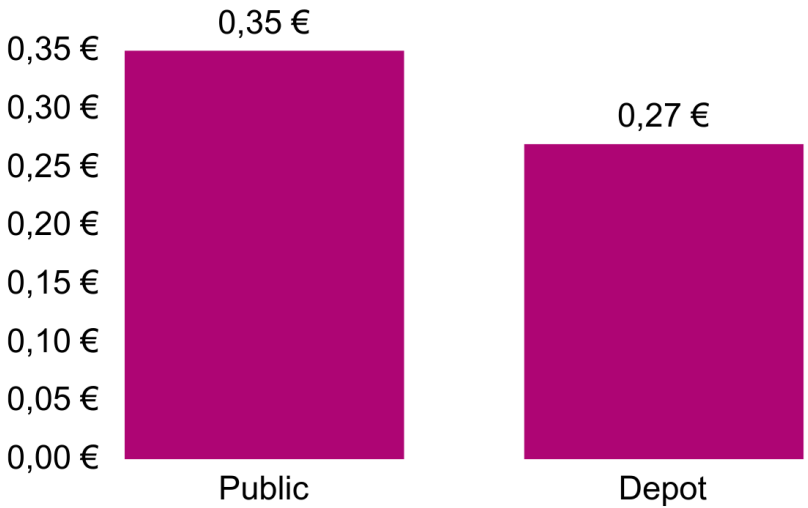
**What percentage of your electricity demand do you plan to cover in the future using which charging options?**

The values indicate the average share of vehicles that companies plan to charge.



# Charging infrastructure

**Up to what price per kWh would you be willing to charge at a charging point?**



# First conclusions

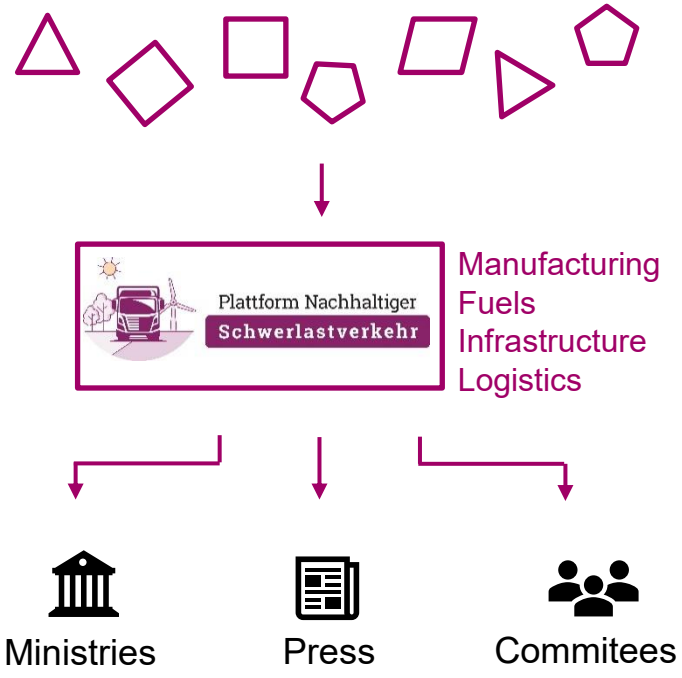
- Impairment/enabling factors:
  - Toll -> TCO
  - Acquisition costs
  - Public charging infrastructure
- Technology focus of logistics companies predominantly electric

The extension of the toll exemption for emission-free trucks until June 30, 2031

Masterplan Charging Infrastructure 2030

Source:NOW

# What we do




**Collect** obstacles, market developments, and demands of the transport and logistics industry…

**analyse, debate** with partners

…and **communicate** to relevant stakeholders.

# Our services

## Publications

- Expansion of charging infrastructure for electric trucks
- Opportunities and risks of HVO100
- Investment readiness of logistics companies in low and zero emission vehicles
- Low carbon fuels for HDVs
- Energy taxation on fuels


## Events

- Parliamentary evenings and breakfasts
- Political 1:1 meetups
- Panel discussions
- Conference appearances




Plattform Nachhaltiger Schwerlastverkehr

Ein Projekt der dena

# PNS-Team

**Chair:**
**Kristina Haverkamp**
dena-CEO

**Co-chair:**
**Steffen Joest**
Head of Industry, Mobility & Energyefficiency

**Axel Blume**
Team Lead Mobility

**Mel Goering**
Senior Expert Mobility

**Marilin Sadu**
Expert Mobility

**Christian Kürschner**
Senior Expert Mobility

| **Support from various departments of dena:** | **electricity grids** | **bioenergy** | **hydrogen tech** | **comms & press** | **policy and strategy** |
|---|---|---|---|---|---|

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# Thanks und dankeschön

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