Renewable fuels
Reducing emissions of the existing fleet

Mobility is changing. Sales of electric vehicles are accelerating, and hydrogen is taking its first steps. The composition of the vehicle fleet is changing, but a more comprehensive shift will take time. More sustainable solutions are also needed for vehicles that are already on the road today and in the foreseeable future.

Road transport in Europe

The average age of the European fleet¹

<table>
<thead>
<tr>
<th></th>
<th>Average Age (years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passenger cars</td>
<td>11.5</td>
</tr>
<tr>
<td>Light goods vehicles</td>
<td>11.6</td>
</tr>
<tr>
<td>Medium and heavy goods vehicles</td>
<td>13</td>
</tr>
<tr>
<td>Buses</td>
<td>11.7</td>
</tr>
</tbody>
</table>

¹https://www.acea.auto/figure/average-age-of-eu-vehicle-fleet-by-country/
The average age of vehicles varies a lot between European countries. The difference can be explained by average income levels, the number of company cars, as well as local taxes and incentives.

Examples of the average age of fleets:

- **Passenger car fleet**
  - Romania: 16.5 years
  - Austria: 8.3 years

- **Light goods vehicles**
  - Spain: 13 years
  - Germany: 8.1 years

- **Medium and heavy goods vehicles**
  - Belgium: 15.8 years
  - Austria: 6.4 years

- **Buses**
  - Greece: 19.9 years
  - Sweden: 6.6 years
Averages don’t provide the full picture

Let’s take a closer look at the older fleets in different European countries.

There are many older cars within the European fleets

<table>
<thead>
<tr>
<th>Country</th>
<th>Vehicle Fleet</th>
<th>Vehicles older than 10 years</th>
<th>Percentage of vehicles older than 10 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poland</td>
<td>24,360,166</td>
<td>19,530,394</td>
<td>80%</td>
</tr>
<tr>
<td>Romania</td>
<td>7,274,728</td>
<td>5,812,225</td>
<td>80%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>1,285,743</td>
<td>1,006,507</td>
<td>78%</td>
</tr>
</tbody>
</table>

In many Member States, a high proportion of medium and heavy goods are 10 years or older

<table>
<thead>
<tr>
<th>Country</th>
<th>Vehicle Fleet</th>
<th>Vehicles older than 10 years</th>
<th>Percentage of vehicles older than 10 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>226,913</td>
<td>222,374</td>
<td>97%</td>
</tr>
<tr>
<td>Estonia</td>
<td>39,848</td>
<td>30,199</td>
<td>75%</td>
</tr>
<tr>
<td>Italy</td>
<td>946,393</td>
<td>720,286</td>
<td>76%</td>
</tr>
</tbody>
</table>
A substantial percentage of vehicles are more than 15 years old

Within the category of older vehicles; many are more than 15 or 20 years old. For example, in Belgium, a substantial percentage of vehicles are over 17 years old, despite having one of the youngest average fleets.

Cars
- 10.8%

Goods vehicles
- 12.54%

Buses
- 14.8%

Even assuming greater uptake of electric and hydrogen-powered vehicles, a substantial part of the vehicle fleet will still be powered by internal combustion engines in 2030 and beyond.

For example, according to a European Commission Impact Assessment Study:

- More than 75% of passenger cars will be diesel or gasoline-powered in 2030
- 80% or more of all light goods vehicles will be diesel-powered in 2030
- 90% of all heavy goods vehicles will be diesel-powered or diesel hybrids in 2030, and 35-40% of all heavy goods vehicles will be diesel-powered or diesel hybrids in 2050

Why we need sustainable fuels post-2040

In 2030, the vast majority of vehicles will continue being powered by internal combustion engines.

The average age of vehicles is increasing*, and this trend is likely to continue.

The majority of the EU fleet in 2040 and a part of the fleet in 2050 will be diesel- or gasoline-powered, particularly for heavy goods vehicles.

Advantages of Neste MY Renewable Diesel™

- **Proven technology**
- **Availability of sustainable raw materials**
- **No new infrastructure needed**
- **Up to 90%* reduction** in GHG emissions over the life cycle of the fuel compared to fossil diesel.
- **Large-scale production**
- **Available now**

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