

Cities driving diesel out of the European car market

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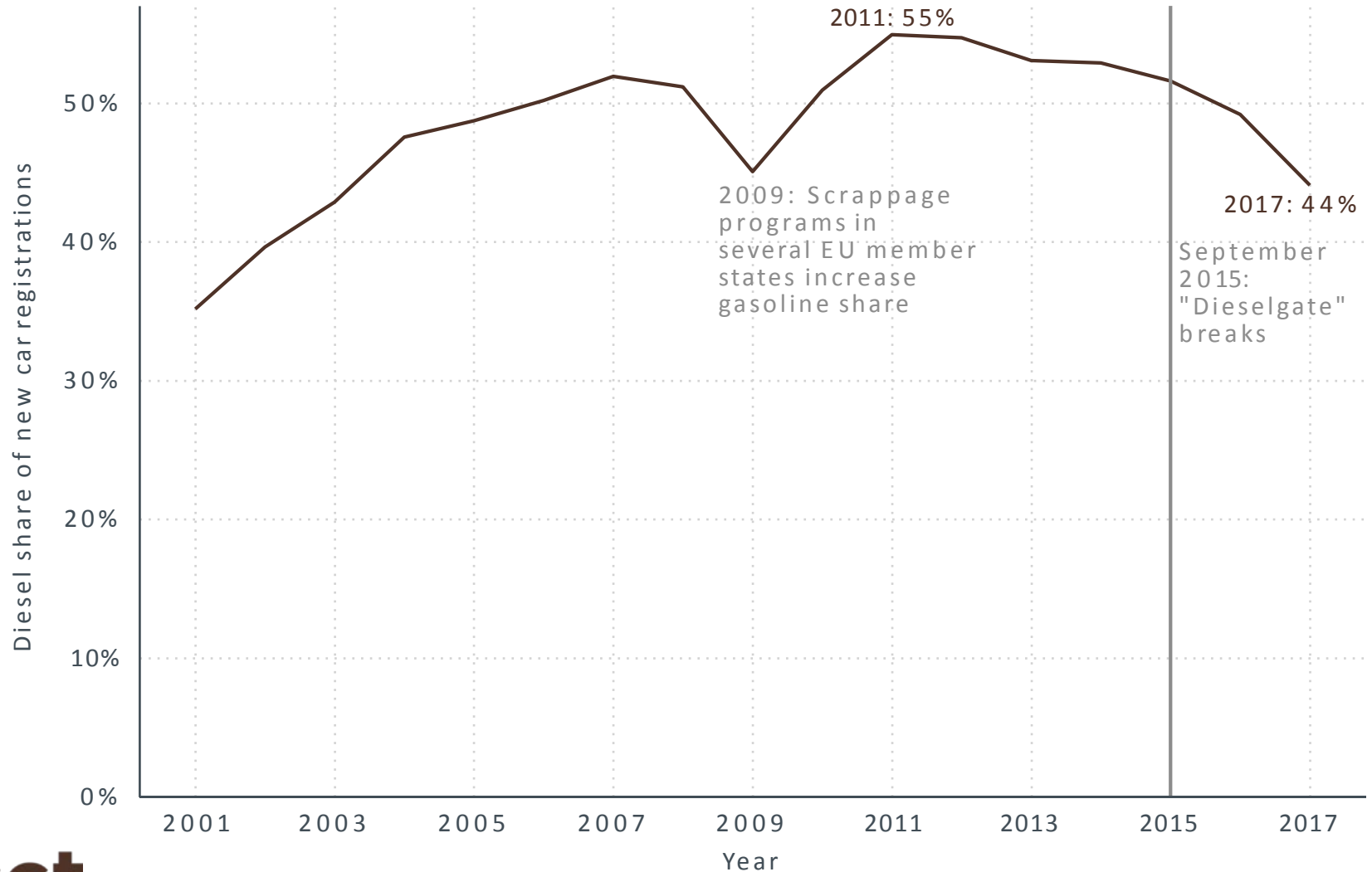
The Real Urban Emissions (TRUE) Initiative City
Symposium



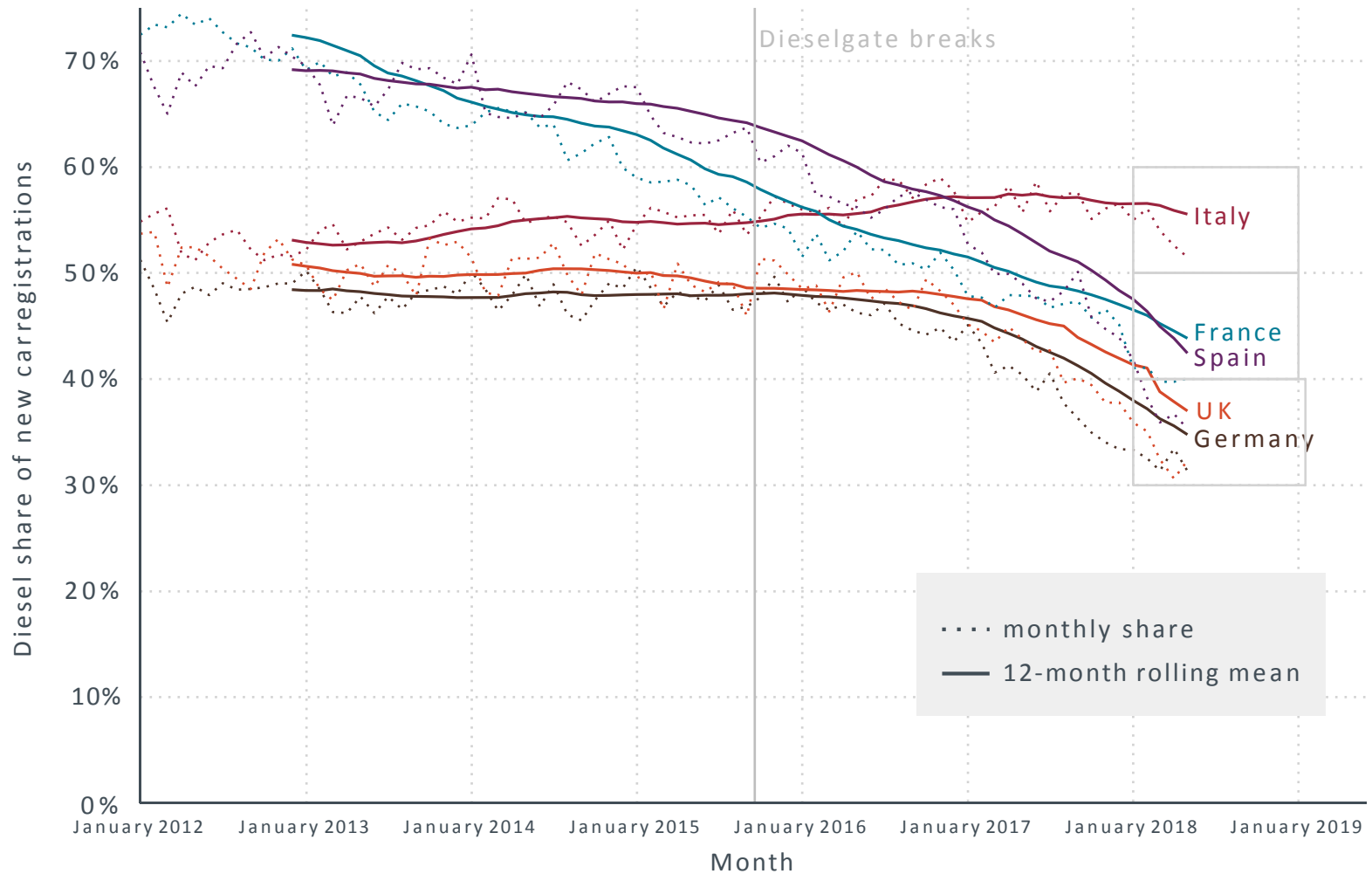
Overview

- Update on European diesel passenger car market
- Reasons for the decline in diesel sales
- Outlook

EU Diesel passenger car sales, 2001–2017



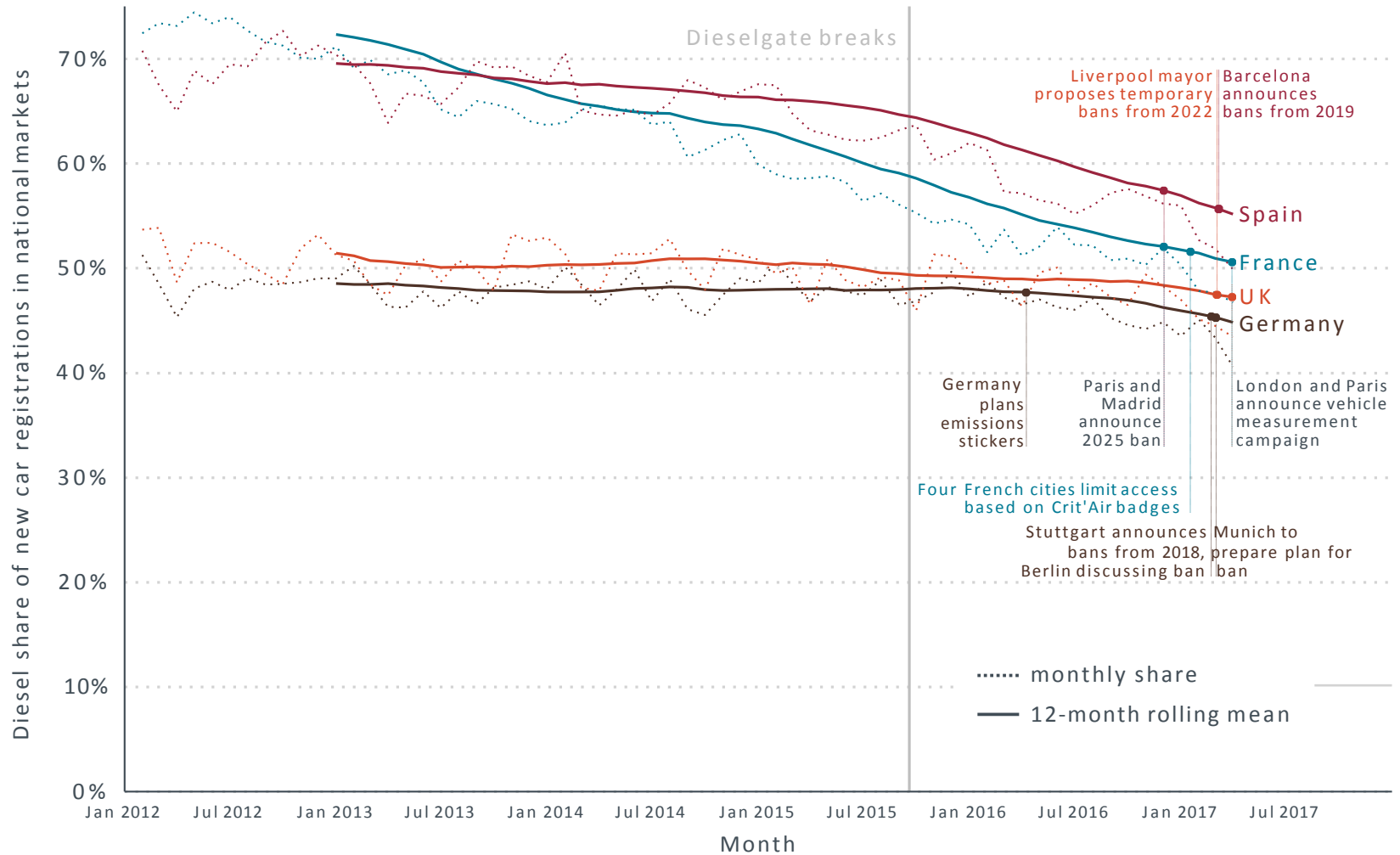
Big 5 markets: Diesel passenger car sales up to May 2018



Drivers of the decline in diesel sales



Cities' role in diesel decline (1)



Cities' role in diesel decline (2)

France

- Several cities using CRIT'Air certificates to limit access to city centers
- Paris to ban diesel cars by 2025

Germany

- Court clears diesel bans
- Hamburg first city to ban old diesel vehicles

Italy

- § Rome to ban diesel cars by 2024

Spain

- § Madrid to ban diesel vehicles by 2025?
- § Barcelona phasing out old diesel cars

UK

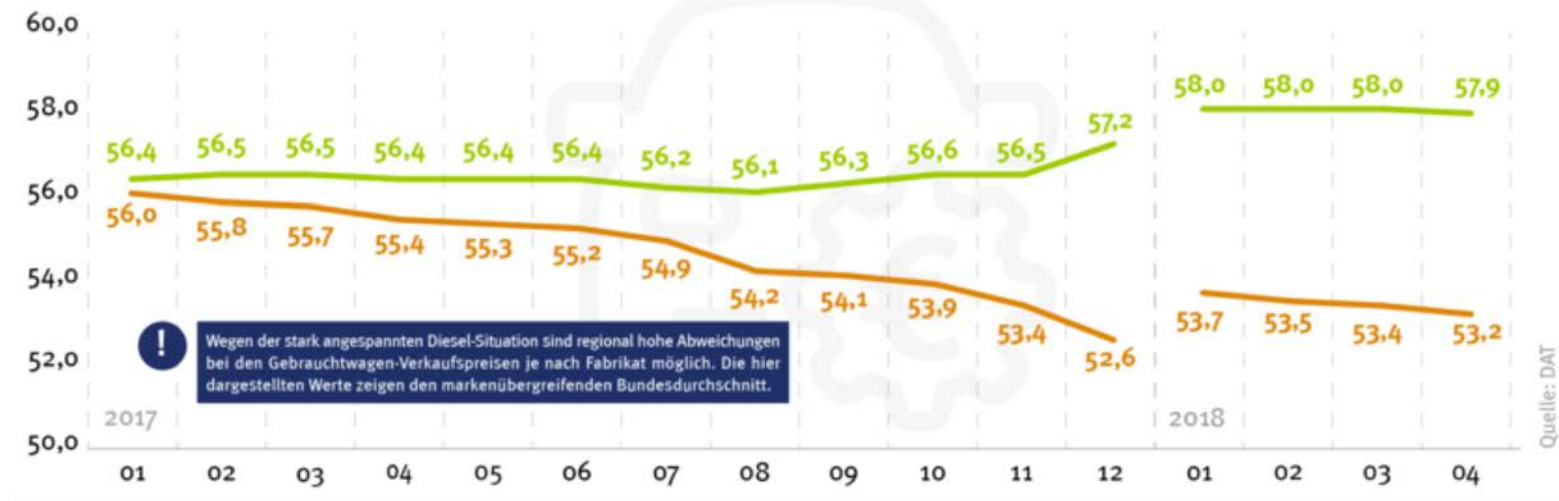
- § London: T-Charge and ULEZ

As diesel market shares decline, so does the market value of diesel cars

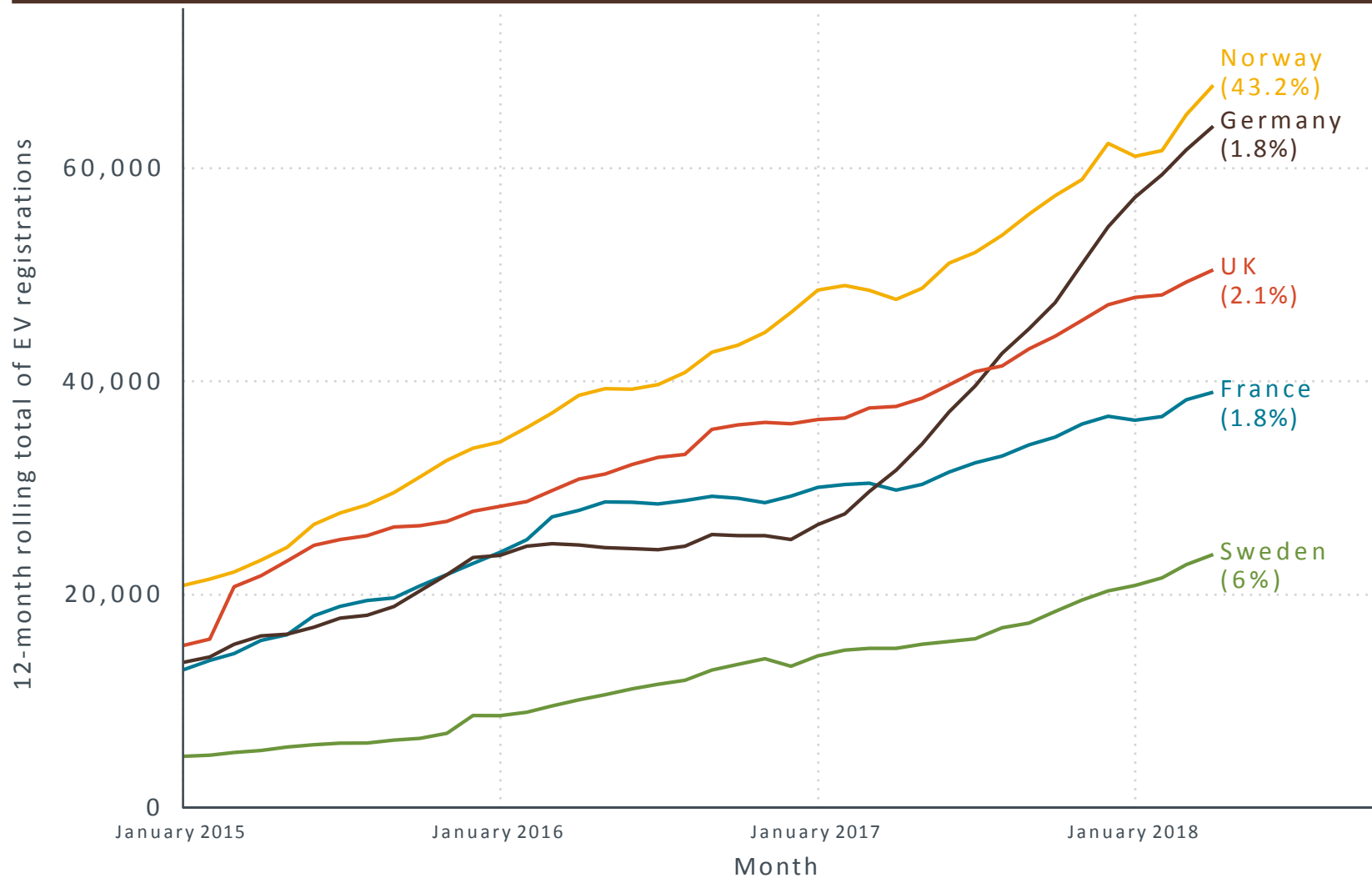
WERTENTWICKLUNG* VOM LISTENNEUPREIS IN %

Alle Segmente und Marken, 3-jährige Fahrzeuge, Laufleistung: 15/20 Tsd. km pro Jahr

● Benzin ● Diesel



Outlook: Can electric vehicles fill the diesel void?



Summary & Outlook

- Diesel share in EU passenger car market rapidly declined in the wake of Dieselgate
- Many different drivers of diesel decline
- ...but cities are playing a major role
- Real-world data key for policy decisions

Blog series on European diesel and EV market

Blogs on...

- [Germany](#)
- [Sweden](#)
- [Cities](#)
- [Italy](#)
- [2017 market update](#)

Data sources

Monthly vehicle registrations data

- France: Ministry of Ecology, Sustainable Development and Energy
- Germany: Motor Transport Authority
- Norway: Opplysningsrådet for Veitrafikken
- Spain: Association of Manufacturers of Automobiles and Trucks
- Sweden: Statistics Sweden
- UK: Society of Motor Manufacturers and Traders

Passenger car valuation

- Deutsche Automobil Treuhand

Image credits

Slide 5:

- <http://eupocketbook.org/>
- https://en.wikipedia.org/wiki/Portable_emissions_measurement_system#/media/File:AVL_PEMS_-_attached_on_a_passenger_car.jpg
- https://commons.wikimedia.org/wiki/File:Fuel_prices_night.jpg
- <https://tfl.gov.uk/modes/driving/ultra-low-emission-zone?intcmp=26434>
- <http://www.thedrive.com/news/19768/vw-dieselgate-graveyards-grow-to-over-300000-cars-across-u-s>

Slide 8

- <https://dieselbarometer.dat.de/>