Cities driving diesel out of the European car market

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Overview

- Update on European diesel passenger car market
- Reasons for the decline in diesel sales
- Outlook
EU Diesel passenger car sales, 2001–2017

2009: Scrappage programs in several EU member states increase gasoline share

2011: 55%

2017: 44%

September 2015: "Dieselgate" breaks
Big 5 markets: Diesel passenger car sales up to May 2018
Drivers of the decline in diesel sales

- EU regulations
- National regulations
- Cities
- Media
- Consumers
- Vehicle OEMs
Cities’ role in diesel decline (1)

- Germany plans emissions stickers; Stuttgart announces Munich to ban from 2018, prepare plan for Berlin discussing ban
- Barcelona announces bans from 2019
- Paris and Madrid announce 2025 ban
- Four French cities limit access based on Crit’Air badges
- Liverpool mayor proposes temporary bans from 2022
- London and Paris announce vehicle measurement campaign

Diesel share of new car registrations in national markets

- Dieselgate breaks
- Spain
- France
- UK
- Germany

- Monthly share
- 12-month rolling mean

**Graph:**
- X-axis: Month
- Y-axis: Diesel share of new car registrations in national markets
- Line colors represent different countries:
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.
Outlook: Can electric vehicles fill the diesel void?

France (1.8%)
Norway (43.2%)
Germany (1.8%)
UK (2.1%)
France (1.8%)
Sweden (6%)

12-month rolling total of EV registrations

Month
January 2015 January 2016 January 2017 January 2018

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

Slide 8

- https://dieselbarometer.dat.de/