

BEV Outlook

Anthony Machin

Head of Content and Product
Glass's

Schwacke.....

Part of Autovista Group

Autovista.....

Part of Autovista Group

Eurotax.....

Part of Autovista Group

Glass's.....

Part of Autovista Group

Agenda

- BEV used car market adoption
- Unprecedented implications
- Hidden in plain sight
- BEV RV Outlook



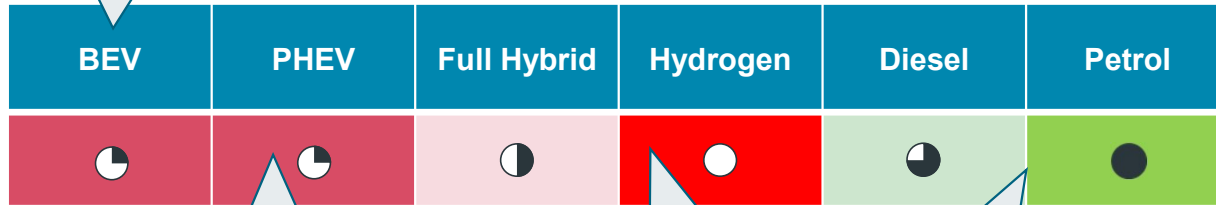
© Autovista Group 2016. Reproduction and commercial distribution is strictly prohibited.

Used market remains strong with ICE powertrain demand

Concerns

- £0 company car tax increasing new demand
- No incentive for customers to buy used vehicles

2021 used car market adoption



Concerns

- Lower company car tax maintaining new demand
- No incentive for customers to buy used vehicles
- RVs at risk

Concerns

- Infrastructure still in its infancy
- Penetration slow until infrastructure grows

Opportunities

- 2021 may see new supply distorted due to Brexit
- Potentially in favour of ICE
- Used demand remains strong



Unprecedented implications

- In nine years
 - All new car and van buyers will have to buy electric
 - Pure battery-electric
 - Hydrogen fuel cell
 - Heavily battery-biased plug-in hybrid (until 2035)
 - BEVs need to fulfill our transportation needs
 - Desirable vehicles
 - Accessible technology
 - Trusted vehicle abilities
 - Educated new and used vehicle dealers
 - Educated owners
 - The right places to charge

Hidden in plain sight...

- Broadening its current range of EV charging solutions
- Shell has completed its 100% acquisition of ubitricity
- A leading European provider of on-street charging for electric vehicles (EVs)
- This represents a further step for Shell's efforts to support drivers as they switch to lower-carbon transport



ubitricity
A Member of the Shell Group



Glass's
Part of Autovista Group

EV Charging Stats 2021

Zap-Stats – 15 March 2021

39061
CONNECTORS

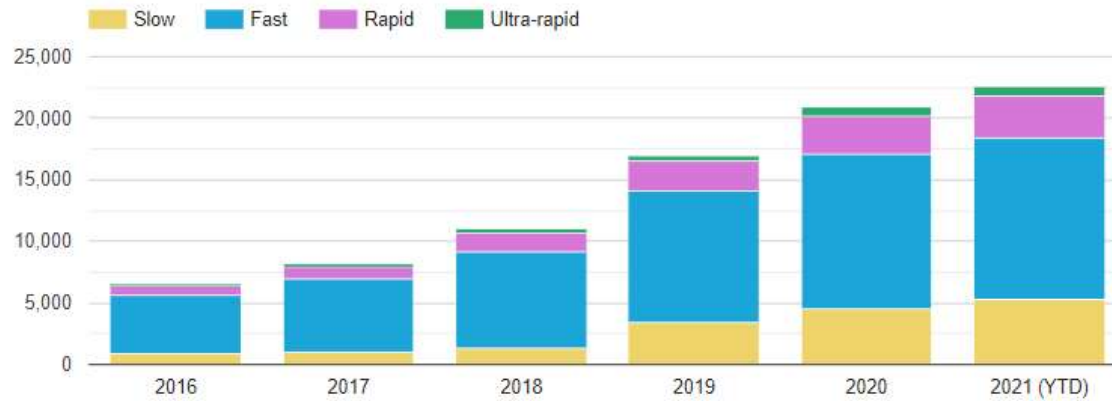
22618
DEVICES

14444
LOCATIONS

787
LAST 30 DAYS



Number of public charging points by speed (2016-to date)



Total devices: 22618, Updated: 15 March 2021



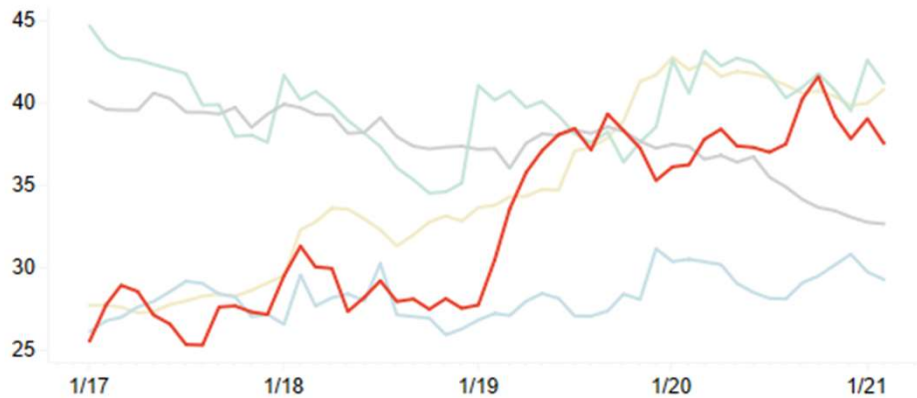
Glass's
Part of Autovista Group

UK: RV outlook 2021-23

BEV RV outlook

	2021	2022	2023
France	▼-1.0 %	▼-1.0 %	
Germany	▼-1.5 %	▼-1.1 %	▼-1.0 %
Italy	▼-2.5 %	▲+1.3 %	▲+1.5 %
Spain	▼-2.0 %	▼-1.8 %	▼-0.2 %
United Kingdom	▼-0.9 %	▲+0.8 %	▲+1.0 %

Trade%, ALL, Electric, 36mths / 60kkm



Trade, 36m/ 60kkm; volume-weighted average across all segments
Source: RVi, Autovista Group

- Overall trend shows BEV RVs growing in strength to a similar level as in Spain
- This is very positive as Spain have higher RVs in general
- Driven by improved technology and consumer knowledge
- Used vehicle incentives targeting BEVs would help RV performance
- BEV will lose 0.9% of value in 2021 and start to recover in 2022

Glass's
Part of Autovista Group

All eyes on EVs: the known unknowns

Range / infrastructure / prices

- How quickly will infrastructure density grow?
- Will BEV list prices remain unchanged when subsidies run out?

BEV remarketing

- How can battery health be easily validated outside a franchised dealer?
- Are there attractive third-life use cases for EV batteries?

Alternatives

- Will hydrogen / synthetic fuels develop into competitive technologies?

