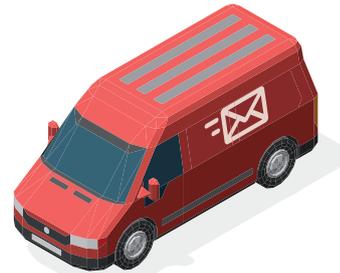


## WHAT ARE VANS?



- Vans are part of a category known as 'light commercial vehicles'.
- The European classification system defines vans as "motor vehicles with at least four wheels, used for the carriage of goods and having a maximum mass not exceeding 3.5 tonnes". They are classified as the N1 category. This category is further broken down into Class I, II and III vehicles, depending on vehicle weight.
- Light commercial vehicles can also be used to transport people, in which case they are treated as passenger cars under the M categories.
- A wide variety of models and sizes of light commercial vehicles are sold and used across the EU, serving a broad range of specific purposes.
- Many light commercial vehicles are registered through multi-stage type approval. This means that the manufacturer produces an incomplete vehicle, which is then completed by a bodybuilder. Thousands of different build-ups are available to satisfy customer needs (for instance camper vans, outside broadcasting vans, freezer boxes, etc).

## WHY ARE VANS IMPORTANT?



- Although the volumes of vans are significantly lower than those of passenger cars, they are of utmost importance for the economy and society.
- Vans enable a broad range of activities, including:
  - construction;
  - postal and courier services;
  - ambulances;
  - policing and rescue operations;
  - mobile workshops;
  - passenger transportation (eg school buses, airport shuttles, etc).
- Largely used by SMEs as business tools, vans power the European economy, helping businesses to thrive.
- As they are business tools, the total cost of ownership is extremely important. Fuel consumption, price and maintenance costs are decisive factors for customers.
- Vans are key players in the logistics chain, enabling the 'last mile' delivery of goods in urban areas.
- Thanks to vans, businesses can deliver goods right to their customers' doors. This is all the more important given the surge in online purchasing by consumers, who expect rapid and direct deliveries.
- Van-derived cars are the most effective means to carry small groups of less than eight passengers.
- Serving very specific purposes, vans cannot be easily replaced by other transport services (such as public transport or carsharing).

## 39

There are 39 light commercial vehicle assembly plants in Europe.



Alternative fuel vehicles represent less than 1.5% of total EU new van sales. This is because, for vans, alternative

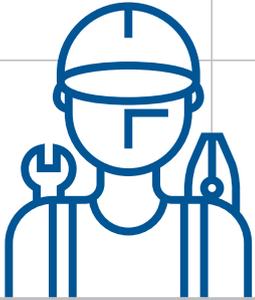
powertrains are generally only applicable for city centre distribution. Customers will only consider purchasing them if their cost and productivity (payload) are comparable to those of conventional engines. After all, businesses are often simply not able to sacrifice payload for lower fuel consumption.

## 28,916,708

There are some 29 million vans on the EU's roads today.



Due to weight, size, and number of specific usage requirements, some technological solutions available for cars are not directly applicable to vans, and the lower production volumes do not allow for the same economies of scale.



## 96%

Diesel vehicles continue to make up the vast majority of new van registrations, making up 96% of sales. Some 1.7% of the current van fleet is powered by alternative powertrains.



## 347,108

European vans are increasingly popular around the world. In 2016, 347,108 vans were exported, worth more than 4 billion euros.

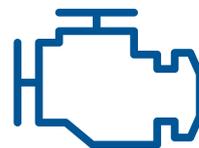
In 2016, average new van emissions were 163.8g CO<sub>2</sub>/km.

## 10.7 years

The average age of the EU van fleet is 10.7 years and rising.

## 80%

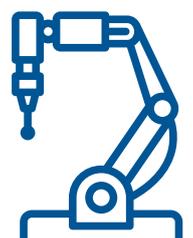
Vans represent more than 80% of sales (in units) in the commercial vehicle market (which also includes trucks, heavy trucks, buses and coaches).



Diesel engines are particularly suited for use in vans as the high torque combined with fuel efficiency assure safe and efficient load-carrying and towing.

## 2.2 million

vans were produced in the EU in 2016.



## 1.9 million

In 2016, 1.9 million vans were registered in the EU, an increase of 12% compared to the previous year.