

# Sustainable Commercial Vehicle Survey

Linking offer & demand

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**an  
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**For your world**

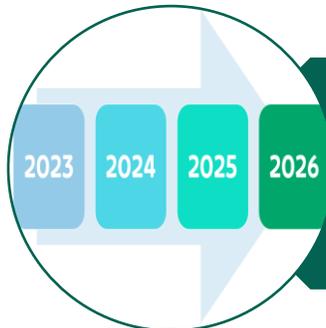
# Main Aims of the Survey



Determine the viable options for zero emission & sustainable commercial vehicles

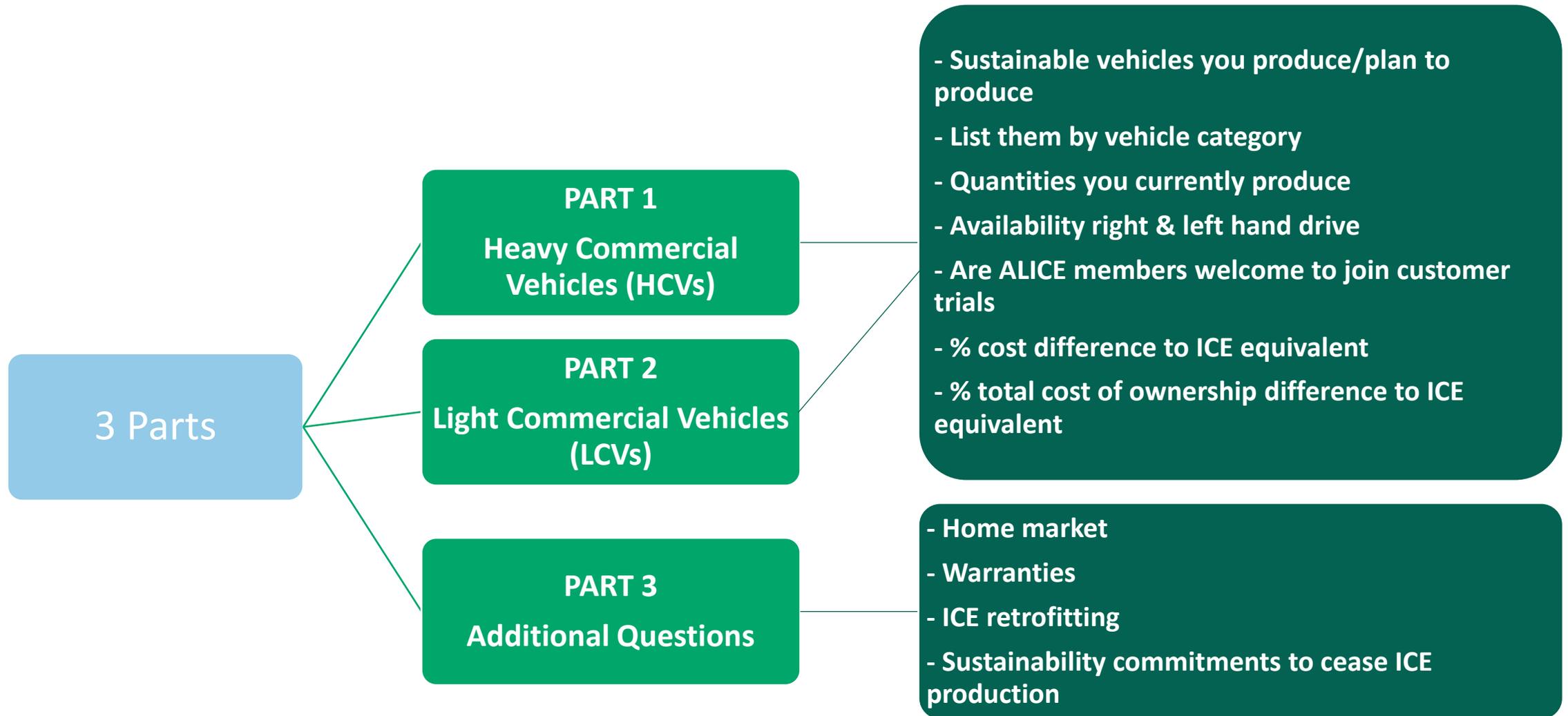


Develop a roadmap, which identified the feasible options for zero emission & sustainable commercial vehicles for ALICE members



Identify timelines for availability of zero emission & sustainable commercial vehicles

# Survey Questions



# Survey Responses

- Survey was sent to 37 OEMs
- Received 5 responses
- Lack of response is a response!
- Too soon – OEMs do not have facilities or fuelling infrastructure for full scale production

*Survey sections completed by OEMs*

	Part 1 (HCVs)	Part 2 (LCVs)	Part 3 (Additional Qs)
OEM 1	✓	✓	✓
OEM 2	✓	X	✓
OEM 3	✓	X	✓
OEM 4	X	✓	✓
OEM 5	X	X	X

# Survey Responses - Part 1 (HCVs)

- Answered by 3 of the 4 respondents
- 9 vehicles listed – 7 BEV, 1 FCEV and 1 H2 ICE
- None of the vehicles listed are in serial production
- No respondent offer a % cost difference compared to ICE equivalent
- Trials & appraisals will be available from 2023 to 2026

Vehicle type	Range	Vehicle production
7.5 tonne BEV Van	Not provided	Start of production is TBC
7.5 tonne BEV rigid truck	>150 km	-
12 tonne BEV rigid truck	>150 km	2024
16 tonne BEV rigid truck	>150 km	Q1 2023
18 tonne BEV rigid truck	>150 km	Q3 2023
BEV Rigid truck (27 tonne)	390 km	2024
Tractor BEV (44 Tonne)	530 km	2025
FCEV (44 Tonne)	>600km	2026
H2 ICE (44 Tonne)	700-800km	2026

## Survey Responses - Part 2 (LCVs)

- Answered by 2 of the 4 respondents
- 7 vehicles listed - 6 BEVs and 1 FCEV
  - The FCEV vehicle was listed in part 3 of the survey but has been summarised in this section
- All of the vehicles listed will be in production by the end of 2022.
- % cost difference compared to ICE equivalent was provided for 4 vehicles
- Trials and appraisals available at the end of 2022
  - For 3.5 tonne BEV Van and 4.25 BEV Van these are limited to the UK

## Survey Responses - Part 2 (LCVs)

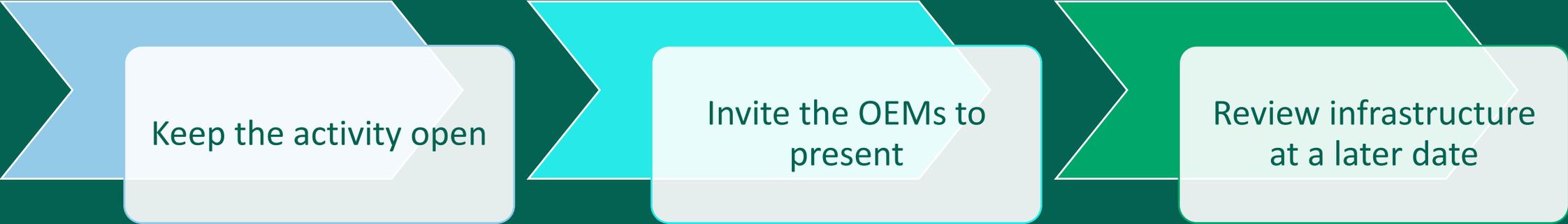
Vehicle type	Range	Vehicle production	% cost difference to ICE equivalent	% total cost of ownership difference to ICE equivalent
3.5 tonne BEV Van	Not provided	Q3 2022	-	-
4.25 BEV Van	Not provided	Q3 2022	-	-
<b>BEV small van</b> <ul style="list-style-type: none"> <li>• 2000-2300kg GVW</li> <li>• 700-1000kg payload</li> <li>• 50kWh battery</li> </ul>	250 km	In production	+55%	Based on energy costs alone - €6600 over 5 years
<b>BEV medium van</b> <ul style="list-style-type: none"> <li>• 3000kg GVW</li> <li>• 1000kg payload</li> <li>• 50kWh battery</li> </ul>	230 km	In production	+45%	-
<b>BEV medium van</b> <ul style="list-style-type: none"> <li>• 3000kg GVW</li> <li>• 1000kg payload</li> <li>• 75kWh battery</li> </ul>	330 km	In production	+45%	-
<b>FCEV medium van</b> <ul style="list-style-type: none"> <li>• 1000kg payload</li> </ul>	400 km	Later in 2022 (Germany only)	-	-
<b>BEV large van</b> <ul style="list-style-type: none"> <li>• 3500kg GVW</li> <li>• 700kg payload</li> <li>• 70kWh battery</li> </ul>	200 km (provisional)	Later in 2022	+70% (estimated)	-

# Survey Responses - Part 3 (Additional Questions)

- Answered by all 4 respondents
- Table below indicates which questions were answered or left blank - cannot give detail as it may threaten the anonymity of the respondents

	OEM 1	OEM 2	OEM 3	OEM 4
What territories/markets do you operate in?	✓	✓	✓	✓
Do you envisage extending your territories/markets to other countries?	✓	X	✓	✓
What are the warranties on the sustainable commercial vehicles listed?	✓	X	✓	✓
Do these warranties apply to the HOME MARKET or ALL MARKETS? If ALL MARKETS, are there any differences in the warranties offered, if yes, can you list them.	✓	X	✓	✓
Will servicing be available to the HOME MARKET or ALL MARKETS? If ALL MARKETS, are there any differences in the servicing offered, if yes, can you list them.	✓	X	✓	✓
Do you offer any sustainable vehicle initiatives for current ICE fleets? E.g. retrofitting for different fuel types, reconditioning, etc.	✓	X	✓	✓
Do you offer retrofitting for hydrogen? YES/NO, If YES, can you detail the criteria and who can avail of this.	✓	X	✓	✓
Do your sustainability commitments require you to cease production of ICE commercial vehicles? YES/NO, If YES, what is your commitment?	✓	✓	✓	✓

## Next Steps



Keep the activity open

Invite the OEMs to  
present

Review infrastructure  
at a later date

# Thank you!

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