

Forecast of electrification in the car market and fleet by 2030 and 2035

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About FEBIAC



Who we are

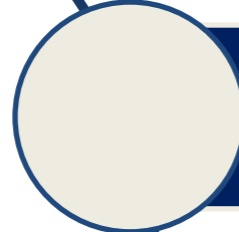
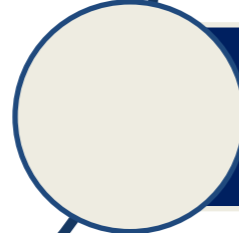
- Federation of automobile industry
- Belgium and Luxembourg
- Cars, motorcycles, light commercial vehicles, trucks
- MOBIA - alliance with Traxio (mobility retail) & Renta (leasing)

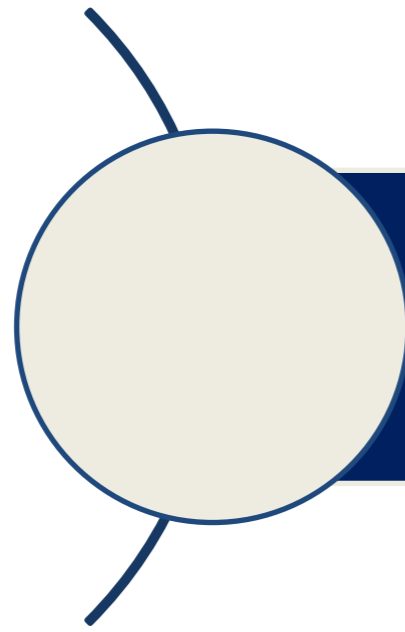
What we do

- Data analysis and vehicle pre-registration
- Knowledge Centre
- Interest representation & communications
- Brussels Motor Show



Agenda

-  FEBIAC forecast electrification in car market and fleet
-  Impact on employment



FEBIAC forecast electrification

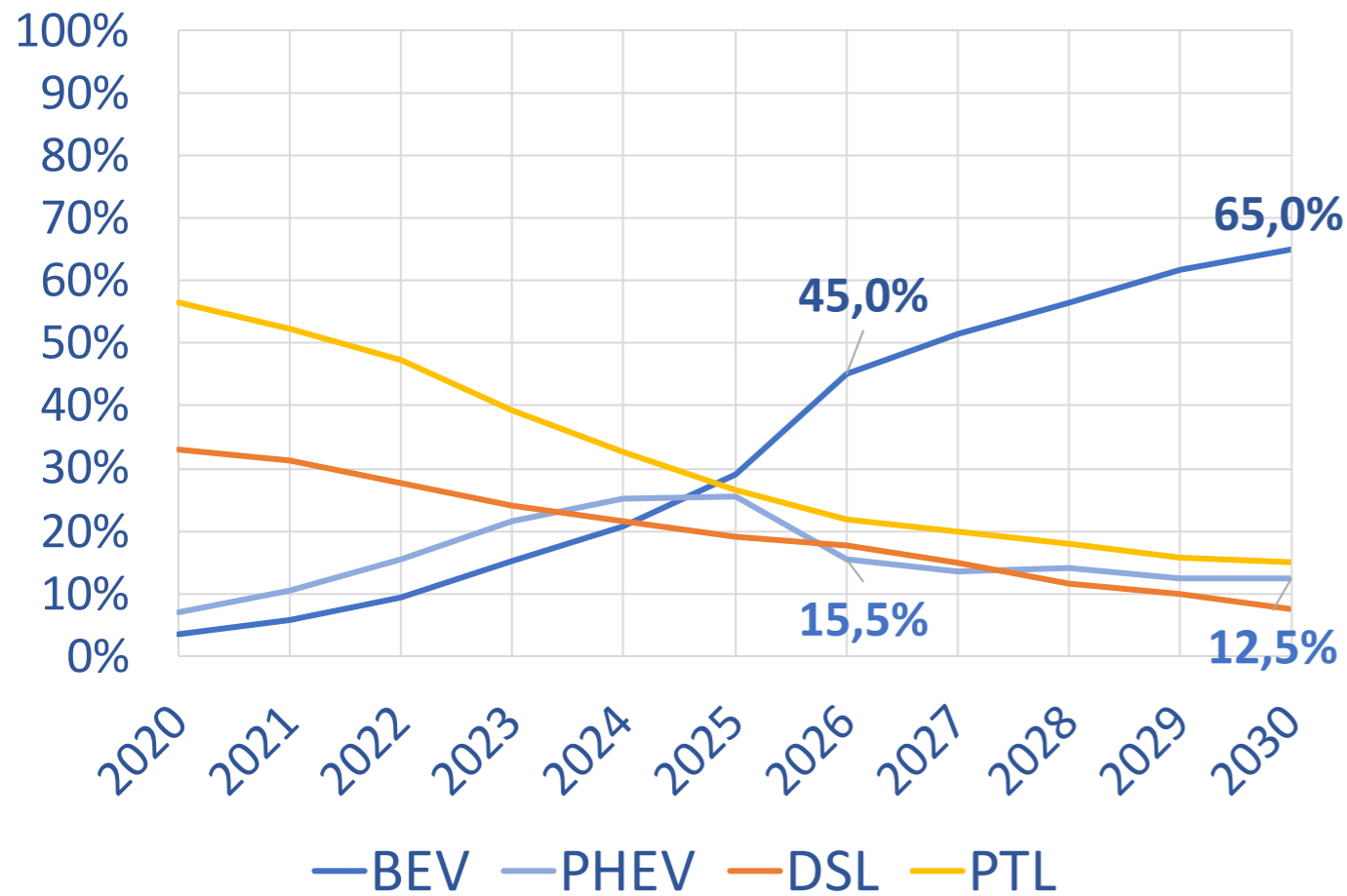
Intro

- Variables: EC proposals CO₂ emission reduction objectives new cars/vans (-55%), OEM announcements
- 2 scenarios:
 1. ZERO scenario: federal cost deduction only for new ZE company cars as of 2026
 2. ZERO **bis** scenario: ZERO scenario + VLA announcements on phase-out of ICE as of 2029
- PHEV 2.0 = BEV from a charging perspective

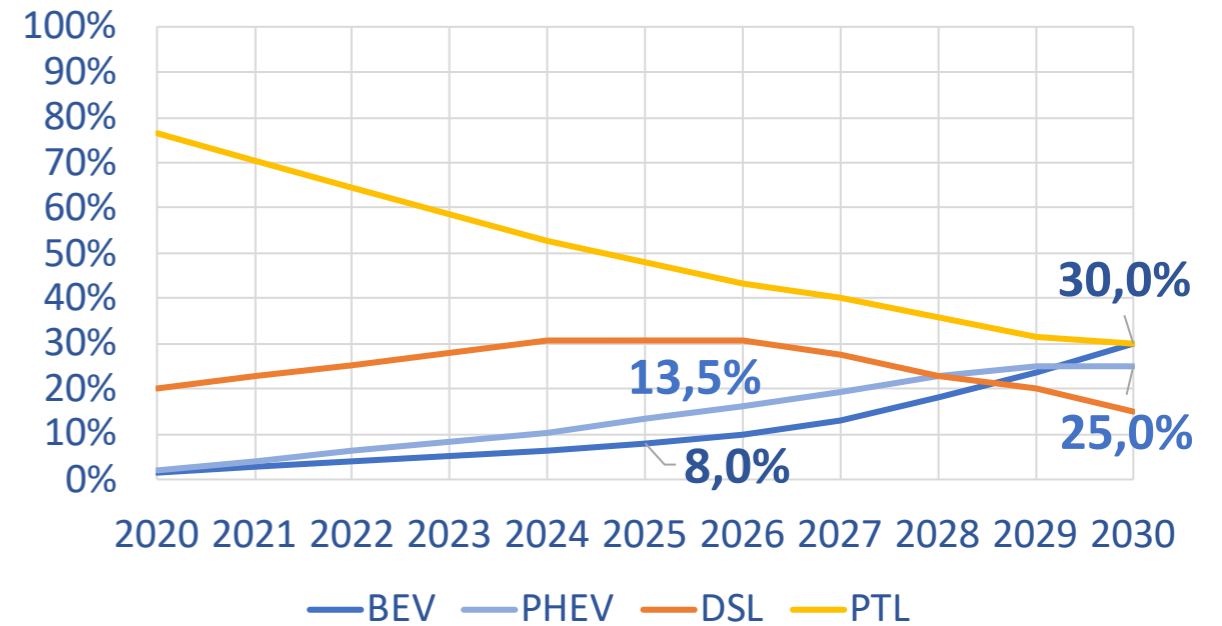


New BE market fuel mix - ZERO scenario (federal: zero emission new company cars 2026)

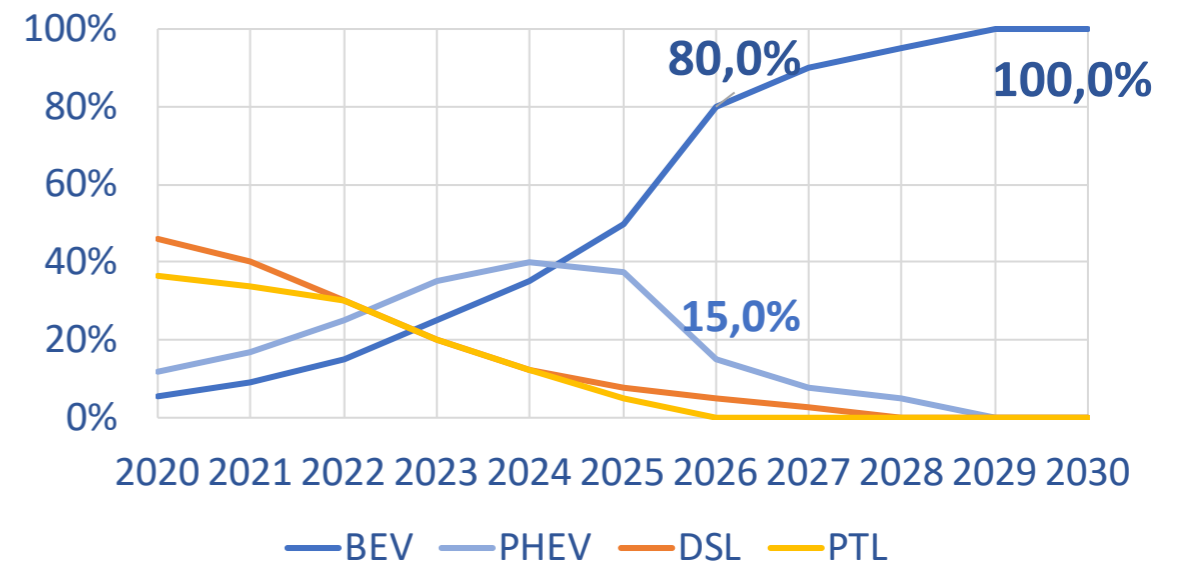
AllCar fuel mix – Zero emission



PrivateCar fuel mix – Zero emission



CompanyCar fuel mix – Zero emission



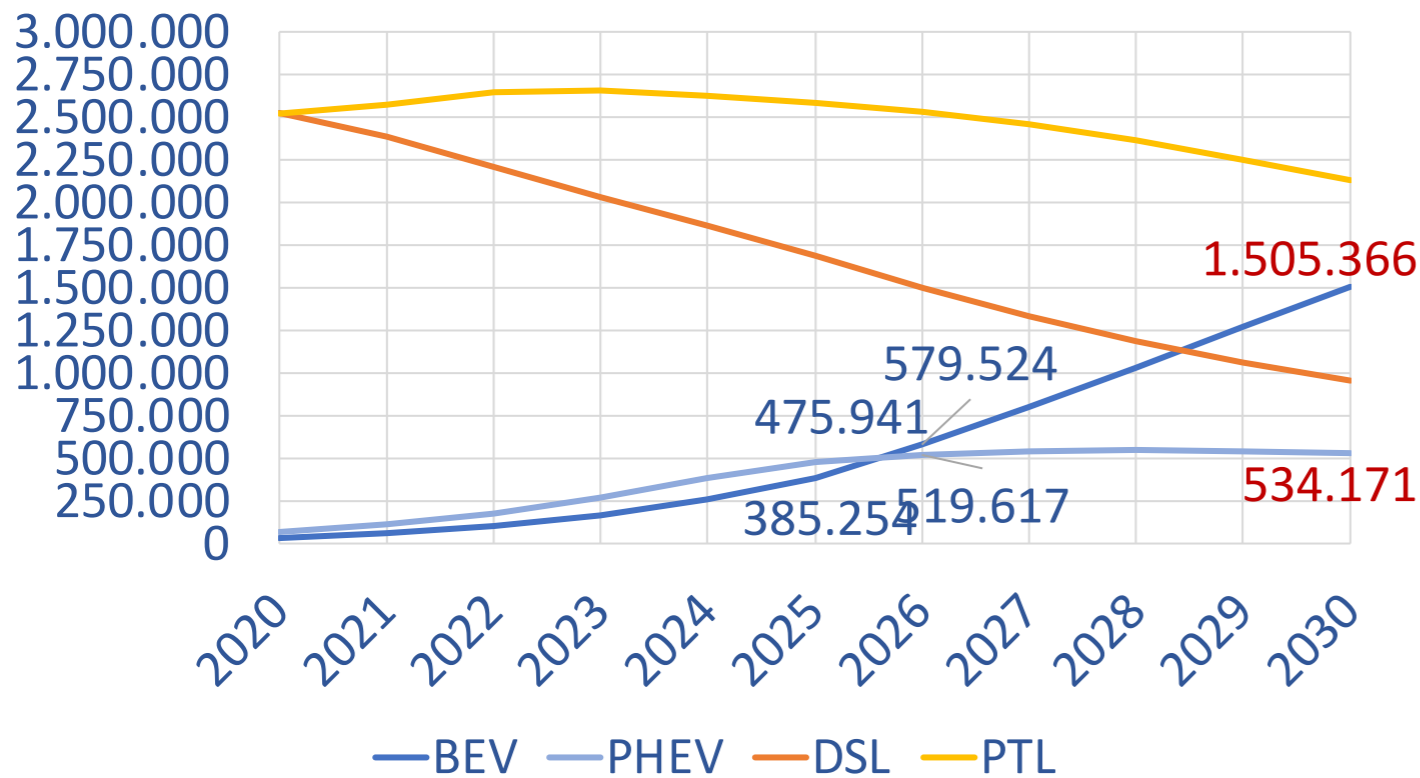
Source: FEBIAC Knowledge Centre



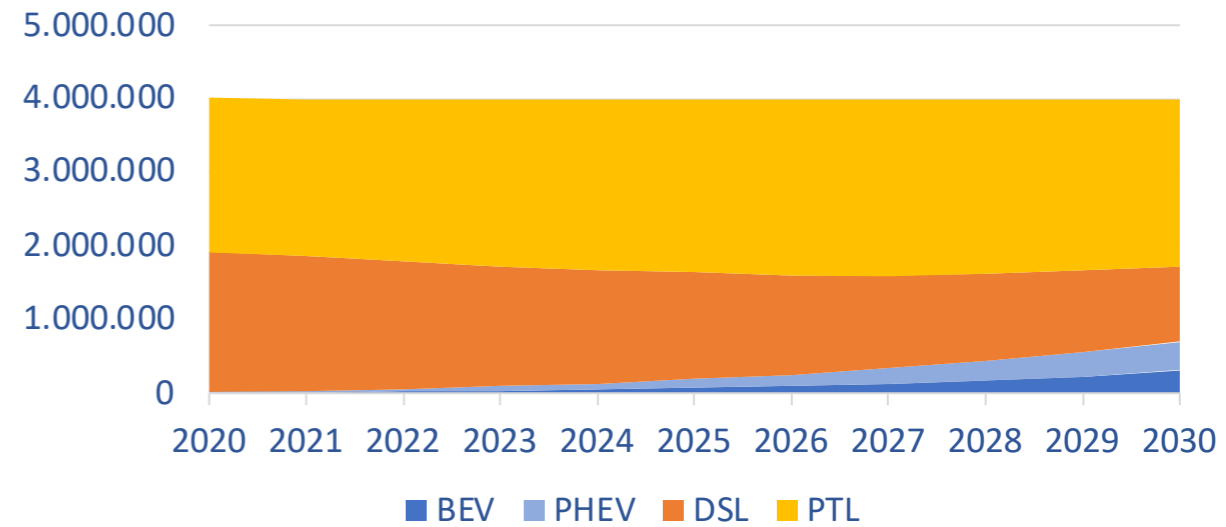
ECV penetration in car fleet (cars ≤16 years old, Belgium) – **ZERO scenario** (federal tax deduct. new ZE company cars 2026)

Assumption end-of-contract company ECVs:
used car market penetration rate
BEV: 50% ; PHEV: 25%

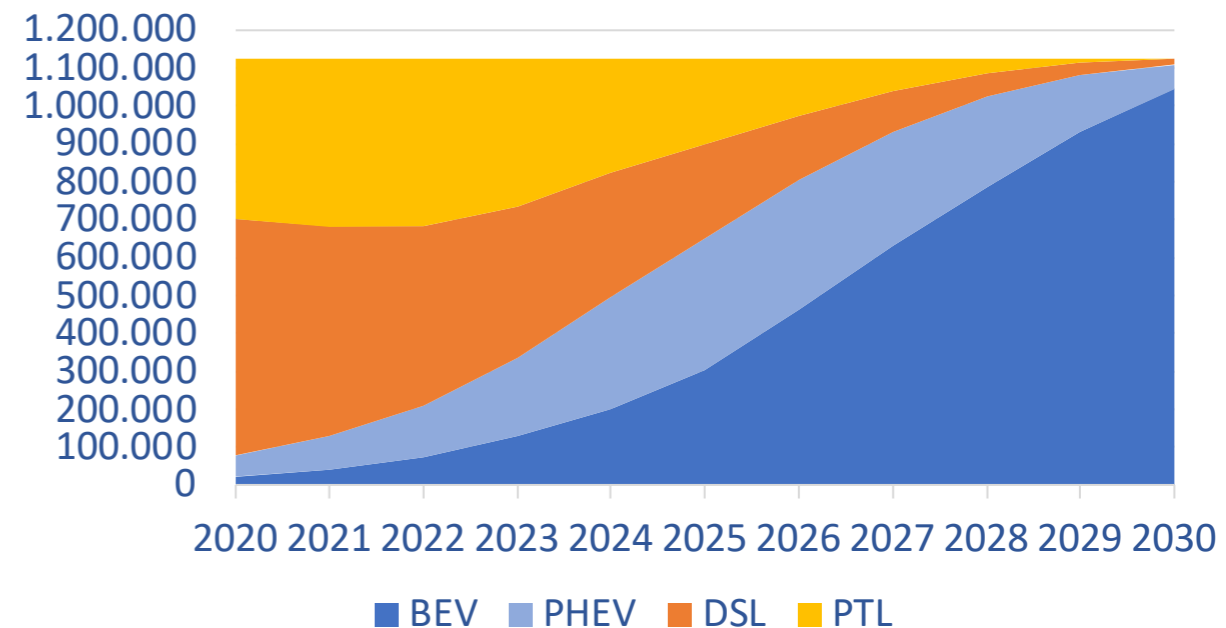
Park AllCar fuel mix



Fleet private car fuel mix – Zero emission



Fleet company car fuel mix



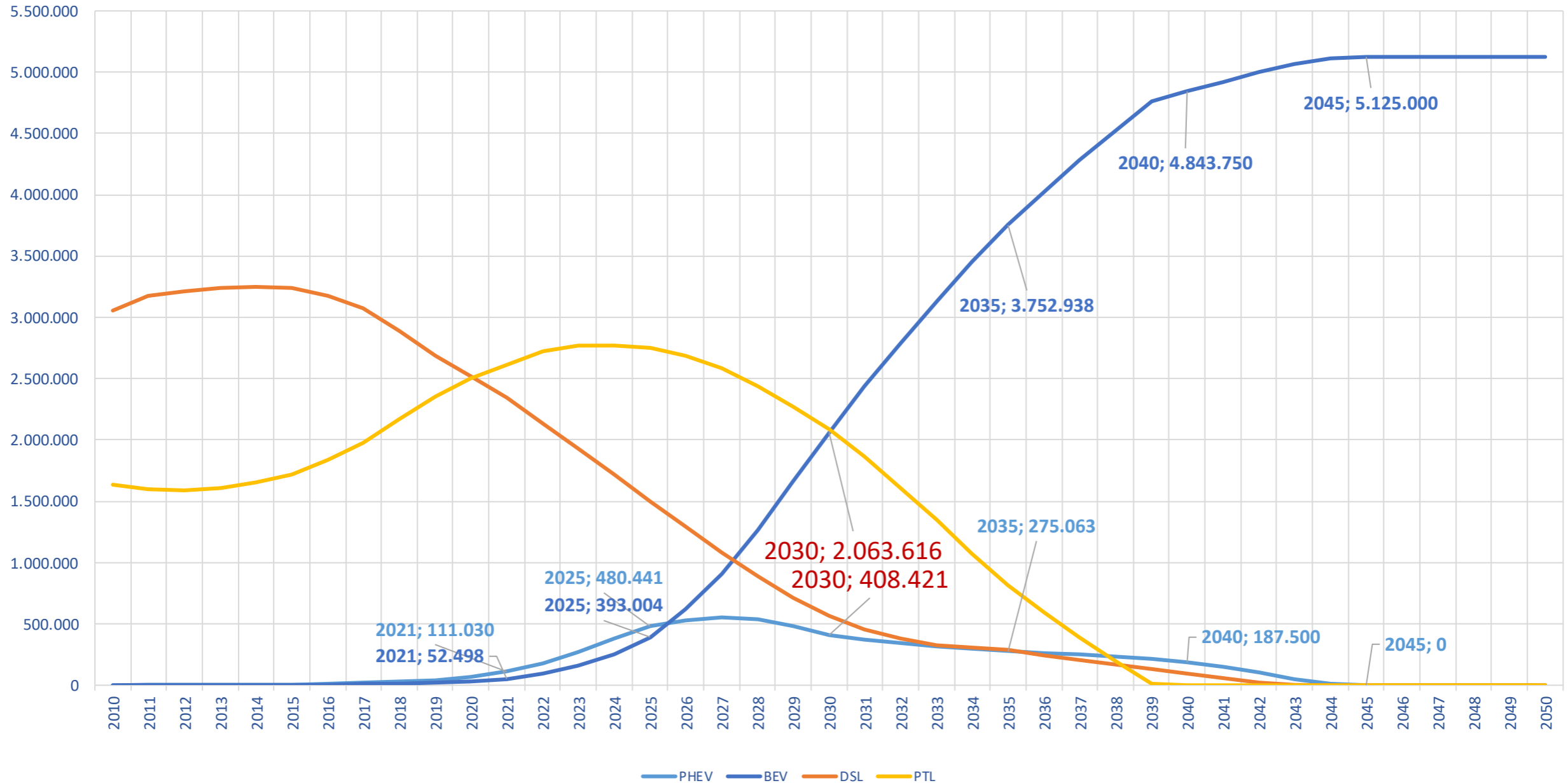
*ECV = electric chargeable vehicle

Source: FEBIAC Knowledge Centre



ECV penetration in car fleet (cars ≤ 16 years old, Belgium) – **ZERO bis scenario** [federal ZE (2026) + VLA ZE (2029)]

Assumption end-of-contract company ECVs: used car market penetration rate BEV: 50% ; PHEV: 25%





Impact on employment

CLEPA study (2021):

- +500,000 existing jobs lost in Europe if full electrification at horizon 2035
- EV powertrain production: 225,000 jobs created in Europe at horizon 2040

Regardless of the exact numbers:

1. Electrification requires a social strategy
2. Skills: training, re-training, safety net
3. Investments: innovation, R&D
4. Education: new graduation programmes, retraining of teachers, academic facilities etc

CLEPA: European automotive suppliers association

<https://clepa.eu/mediaroom/an-electric-vehicle-only-approach-would-lead-to-the-loss-of-half-a-million-jobs-in-the-eu-study-finds/>



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