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## **More cars on Germany's roads Women and older people catching up on car ownership**

### **Shell Germany presents Passenger Car Scenarios up to 2030**

Despite the financial and economic crisis, the passenger car fleet in Germany will increase in the medium term. The main reasons for this increase from today's level (2007) of 47 million to 49.5 million cars in 2030 is the rise in car ownership among women in general, and the rise in car ownership by older people. Despite the increase in alternatives such as hybrid and hydrogen propulsion, the combustion engine will still be the main form of propulsion in future. Fuel consumption will continue to decline. And CO<sub>2</sub> emissions will be substantially reduced. Those are the principal findings of the 25th Shell Passenger Car Scenarios up to 2030, presented by Shell Germany in Berlin today under the title "Facts, Trends and Options for Sustainable Mobility".

"Shell has been observing the development of motorised individual transport since 1958," said Dr. Peter Blauwhoff, Chairman of the Management Board of Deutsche Shell Holding GmbH, "in order to study long-term trends in the relevant corporate environment, and on that basis to initiate and move forward political and social discussions".

With expected annual average economic growth of 1.1%, and a decline in the population figures (down 3.7 million to 78.5 million by 2030), two policy framework scenarios were examined. Firstly the Trend scenario, which assumes that the current development will basically be continued. And secondly the Alternative scenario, which assumes tougher climate action goals and tries to quantify their impact on the passenger car situation. (The latter corresponds to the Blueprint scenario in the Shell energy scenarios up to 2050).

"Automobile emancipation" continues. Car ownership among women will rise from today's level of about 340 to over 430 per 1000 women, reaching a level of about 60% of male motorisation in 2030. Car ownership among men will be just slightly higher than today, increasing from just under 700 to about 715 per 1000 men in 2030.

Most age groups take their motorisation with them as they move from lower age groups into higher age groups. Particularly women over 50 will increase their motorisation substantially, and older men will also slightly increase their ownership. This results in increasing car ownership and auto-mobility in the older age groups. Motorisation continues to decrease slightly in the under-35-year-olds.

The total passenger cars fleet will increase from today's level of 47 to a total of 49.5 million cars. That gives an average statistic motorisation level over all owner groups of about 630 cars per 1000 people versus a little over 570 today. About 3 to 3.5 million new registrations will be needed each year to achieve this level of car ownership.

Average annual mileage per passenger car will decrease from today's level of 12,500 kilometres to 11,900 in 2030. However, aggregate mileage will increase from 588 billion vehicle kilometres to 595 billion in 2020, and then go down to 590 billion kilometres by 2030. In future, an ever larger proportion of this aggregate mileage will be done by older people. While under-40s accounted for nearly 40% of aggregate mileage in 1995, they will account for only around 20% in 2030. The share of aggregate mileage taken by the over-50s will move in the opposite direction, increasing from 23% in 1995 to 35% in 2030.

“Despite an increase in alternative propulsion systems,” said Dr. Karsten Wilbrand, Head of Fuels Technology Shell Deutschland, “the combustion engine will continue to be the most widely used system in future.” At the same time, it is expected that diesel will be in shorter supply than gasoline. That is likely to have an impact on diesel registration figures. And exhaust gas treatment in diesel systems is also likely to become more expensive, due to tougher standards. New registrations of diesel and gasoline vehicles are therefore expected to be about equal in 2030. Fuel economy will be further improved in both. “For gasoline we are expecting an improvement in fuel economy by about 0.8% in the Trend scenario and 1.3% in the Alternative scenario,” said Dr. Wilbrand. For diesel, the improvement will be 0.8% (Trend) and 1.2% (Alternative).

What do these findings mean for climate policy? “In the Trend scenario, the CO<sub>2</sub> savings will be about 14% in 2020 versus baseline 2005,” said Dr. Jörg Adolf, Economist Shell Germany. That means the climate action goals set by the EU for non-emission-trading sectors could be met. “But in order to achieve that,” he added, “all the automobile players will have to rethink their strategies.”

For more detailed information please have a look at full study on [www.shell.de/pkwszenarien](http://www.shell.de/pkwszenarien)

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