



GAS MOBILITY DAY

**DEN PLYNOVÉ
MOBILITY**

CNG – LNG – Biometan

Gas Mobility @ GAZPROM
Cross border lessons learned and outlook

02.09.2020

Gazprom NGV Europe GmbH



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About us

02.09.2020

GAZPROM NGV Europe GmbH

- GAZPROM subsidiary
- Specialization in natural gas mobility
(**N**atural **G**as for **V**ehicles)
- International station operator
- Various types of technology and filling stations
- Develops the market for the use of natural gas on the road in the form of CNG and LNG
- Promoter of Gas for Transport since 2005 with business development in Germany, Czech Republic and Poland





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Our station network

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GAZPROM CNG stations overview

At present, **Gazprom NGV Europe** has **48** CNG stations in Germany and **14** CNG stations in the Czech Republic.





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Our strategy

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Recent sales and business approach



Keep and optimize own filling station at the location

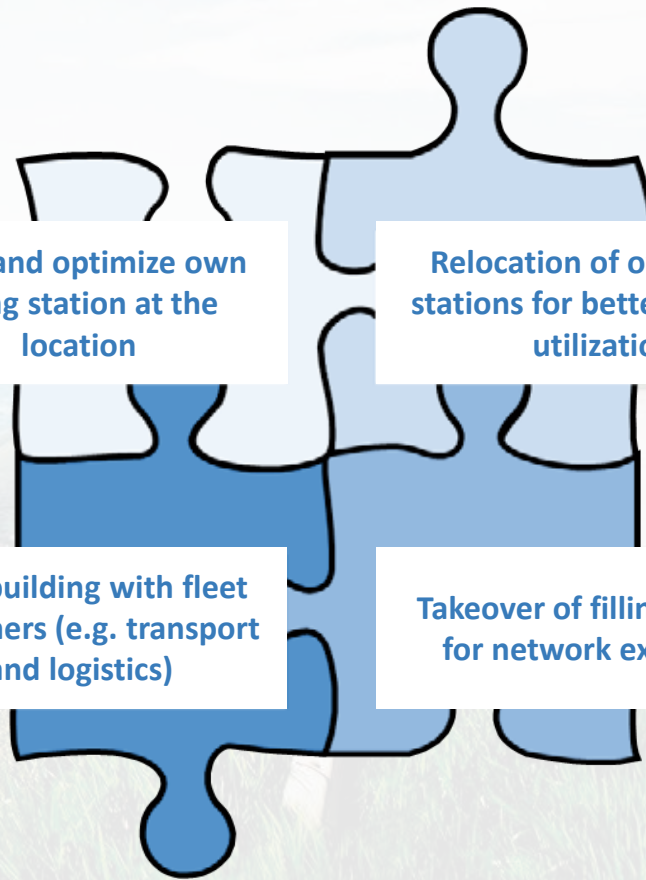


Relocation of own filling stations for better network utilization



New building with fleet customers (e.g. transport and logistics)

Takeover of filling stations for network expansion





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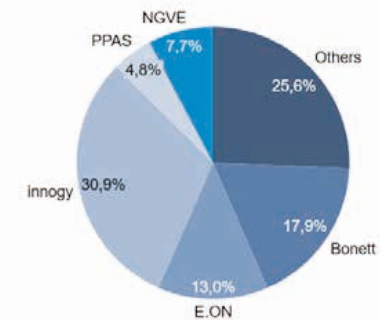
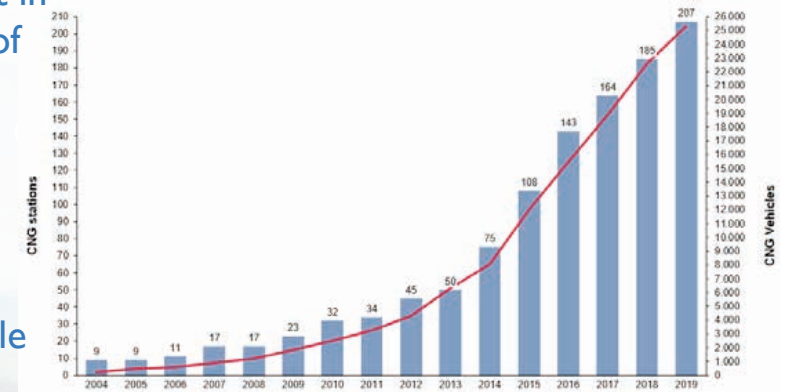
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Our experiences
in the Czech Rep.

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Czech market experience and trends

- One of the fastest growing CNG market in Europe with one of the highest density of CNG stations
- High public awareness for CNG as alternative fuel due to intensive use in public transport
- Long-lasting political support by plannable taxation and subsidy programs
- Strong support (but also dependency) from national car manufacturer Skoda Auto
- Market concentration on 5 major CNG filling station operators
- Bio-methane and LNG for transport has started and will become more and more important



211 CNG Stations

155 Stations owned by Top 5
8 % Gazprom Market Share

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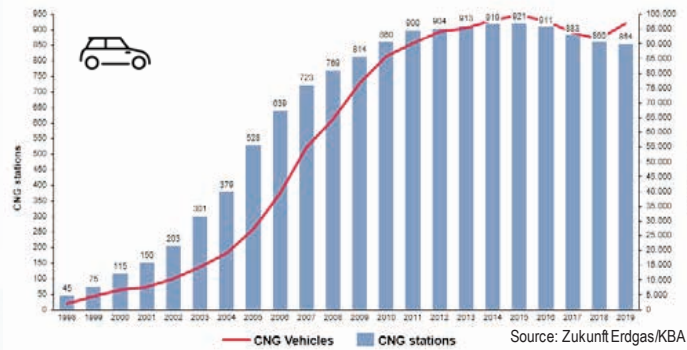
Looking abroad I

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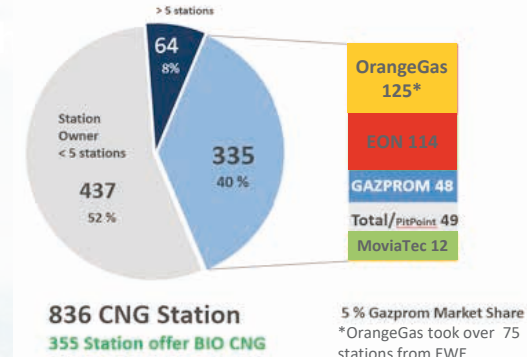


Market Driver in Germany

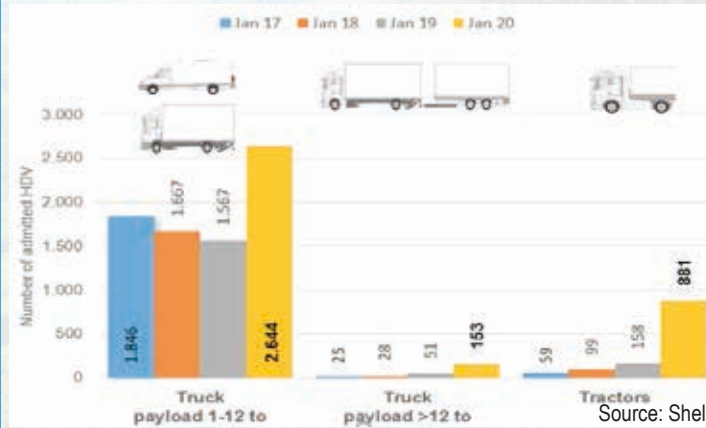
Stable CNG fleet with small actual growth



Market consolidation filling station operator



Significant growth in CNG & LNG trucks



Continuous increase of bio-methane share





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Looking abroad II

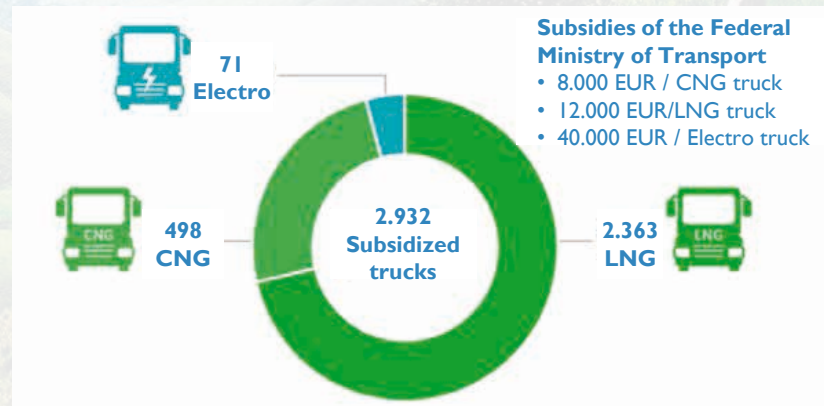
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LNG boom in Germany

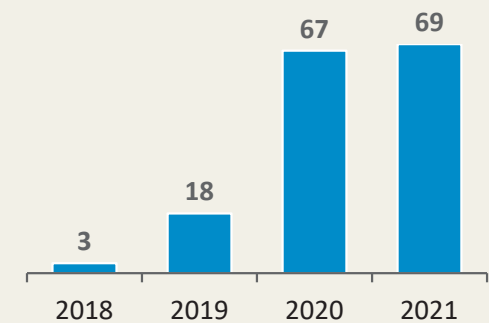
Toll Exemption

- From 2019 – 2020 environmentally friendly gas powered trucks (CNG and LNG) are excluded from highway toll
- In May 2020 the toll exemption was prolonged by another three years until end of 2023
- Savings per kilometer are between 9.3 EURcents/km (up to 12 tons) and 18.7 EURcents/km (from 18 tons)

Granted subsidies from July 2018 to July 2020



LNG filling station growth



In Operation

Planned

- 40 LNG stations are required in Germany to have a German wide basic coverage for LNG trucks (all 400 km)
- 60 stations will be in operation at the end of 2020
- > 100 stations are currently planned until 2023

Data Source: LNG Taskforce DENA



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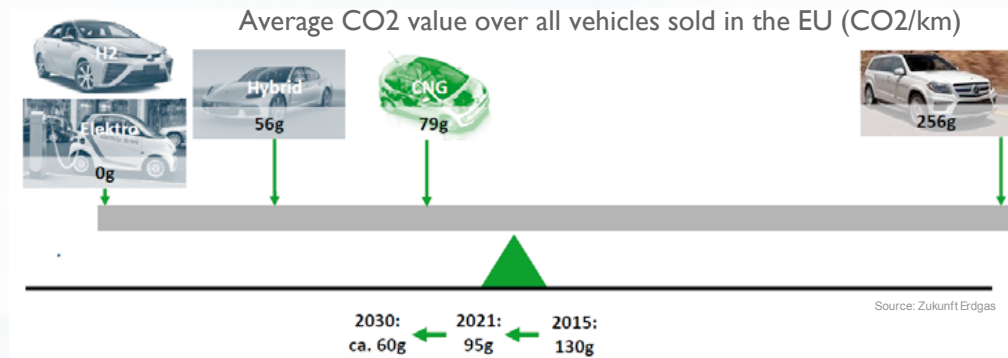
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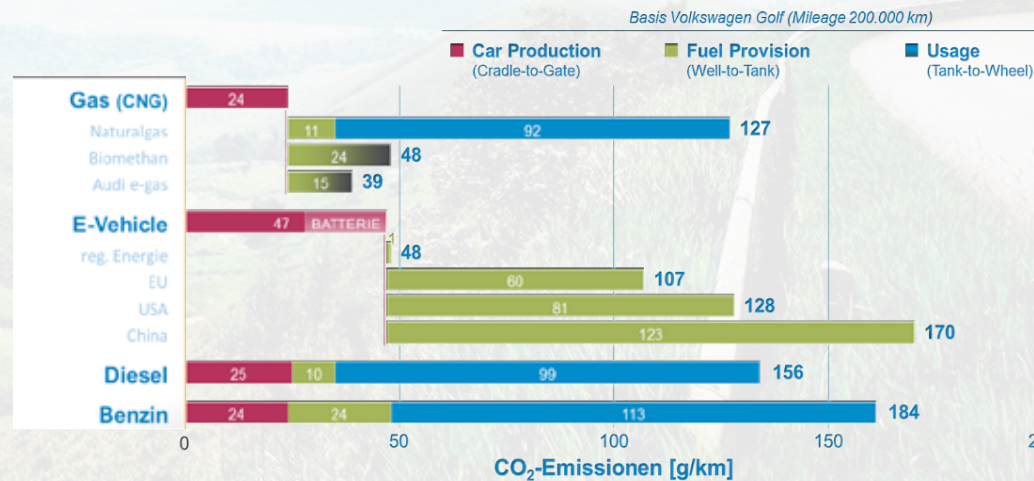
CO2 fleet limits discussion

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Holistic consideration of emissions necessary



The current regulation for CO2 fleet limits offers vehicle manufacturers only limited incentives to actively market natural gas vehicles



Real CO2 emissions along the value chain („Cradle to Wheel“) support the call for an opening of the CO2 fleet regulation for biogas and synthetic gases



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Our concerns
and outlook

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Threats (or chances) for Czech G4T market

- Lack of cars / short time availability of NGV (esp. by Skoda)
- Decreasing political support / focus only on E-Mobility on EU level
- No support mechanism for trucks in place / toll exemption
- Long lasting permitting / unsolved garage ban
- Less bio-methane production plants than needed
- Continuous Tank-to-Wheel CO2 fleet regulation
- Decreasing service network by market concentration
- Loss of positive reputation in public / non-innovative image without positive perception

Let us do something against it and promote the future proof fuel more intensively!



Gas for Transport – Powered with Emotions



Contact us

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Thank you very much for your attention!

Velmi děkuji za Vaši pozornost!