



Moving Technology & Mindsets to Decarbonisation

Grahame Neagus
Head of LCV & Municipal Renault Trucks UK
April 2025



**RENAULT
TRUCKS**

Huge growth in UK & Ireland of LCV

92.6 billion kms
per year

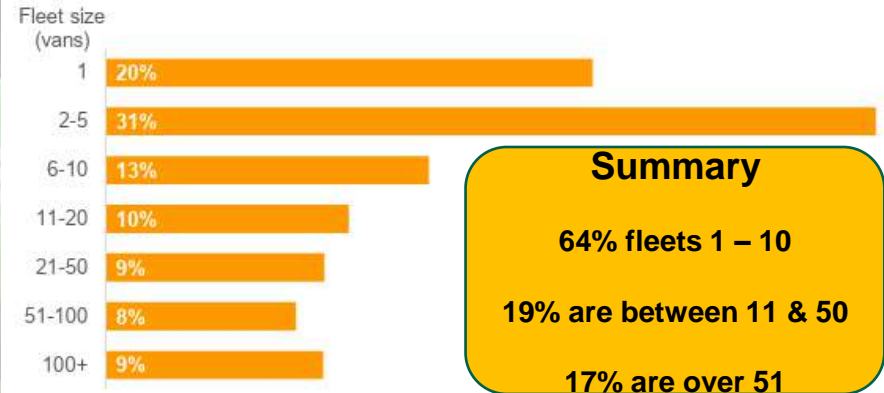


233,216 registrations
in 2024....260,000 by 2030

ZEV Mandate
is 70% EV by 2030

87% Some form of leasing
13% purchase

Size of Van Fleets (Table: VAN0109)





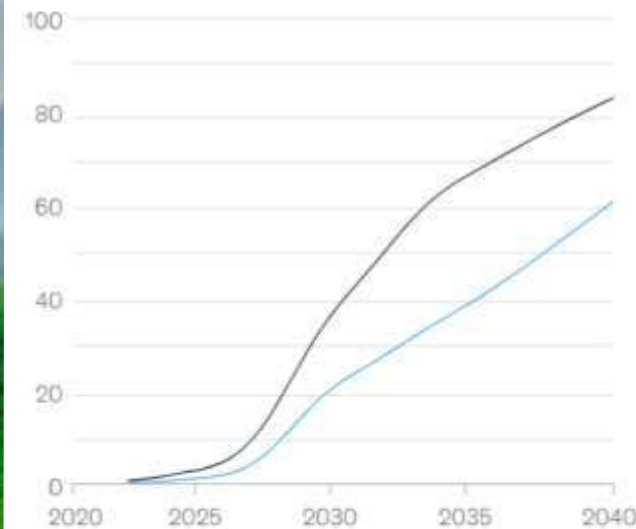
Logistics is continually evolving

The next 5 years will see dramatic change

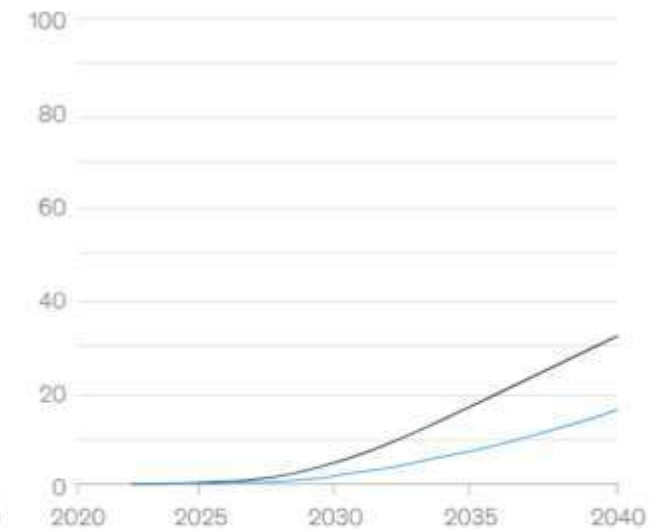
New-truck sales in the United States and the European Union will aggressively transition to zero-emission powertrains by 2040.

— Europe — US

Sales, current trajectory, BEV and FCEV¹
sales as % of new-truck sales



Parc, current trajectory, BEV and FCEV¹
parc as % of total truck parc



¹BEV is battery electric vehicle; FCEV is fuel-cell electric vehicle.
Source: McKinsey Center for Future Mobility

OEM's are under immense pressure

Transition to Solution
Provider from just Sales

Scale up EV
Production

Reduction in
Product Costs

New Product
Design

Euro VII development
& VECTO in tandem
with EV and new Fuel
Cell Technology

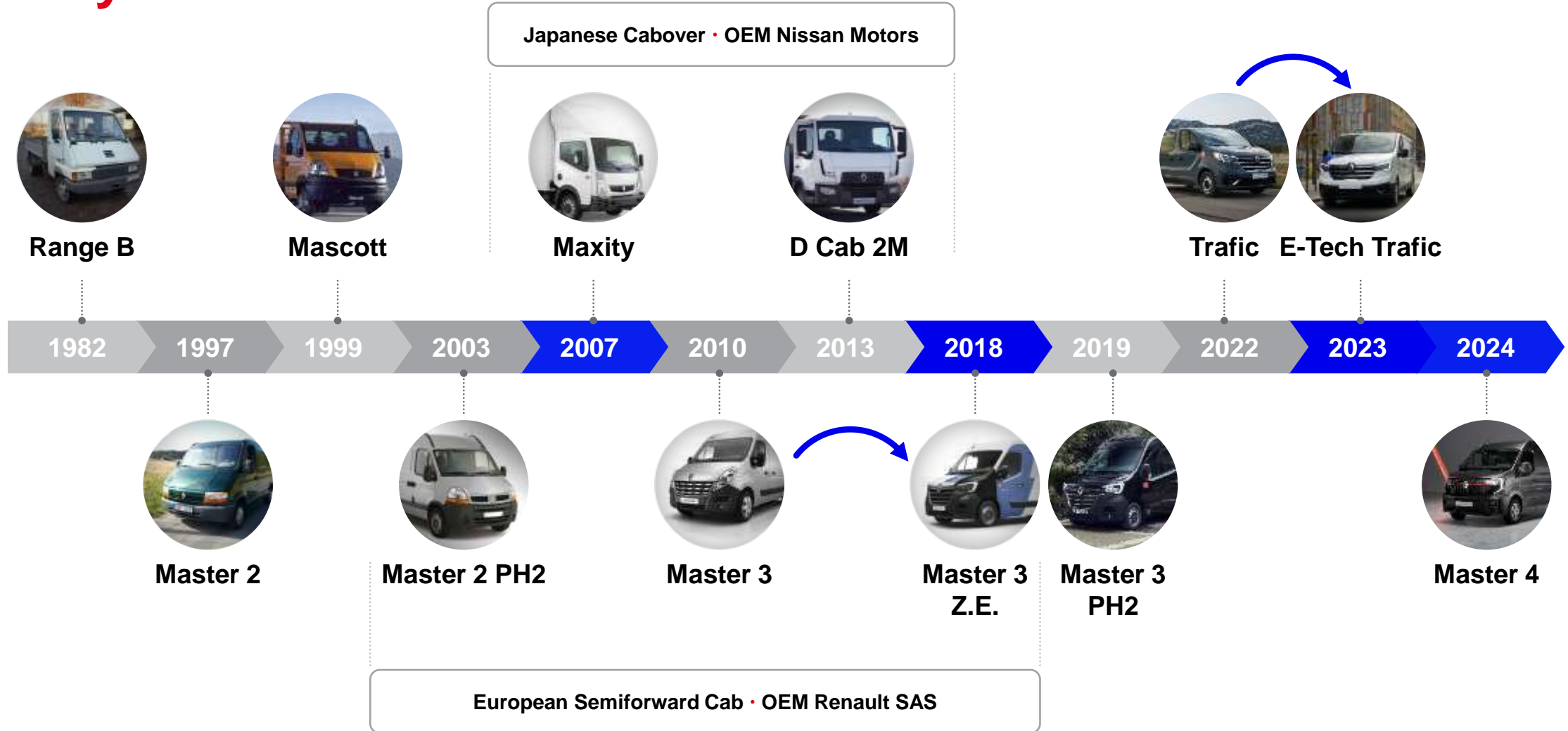
Increases in
Competition
from Far East

Setting up new
businesses for 2nd
life recycling

New Supply chains
in production like
eAxles, Batteries



LCV is Renault Trucks core business since 1982 – 42 years in total and EV since 2007





**The WIDEST Electric Range in EUROPE
TODAY in range & understanding**

Legislation is driving our future



Facts in 2024.....

Large Logistics businesses have the funds & Shareholder pressure to change

Smaller businesses have neither

Freight buyers have little appetite to pay for green logistics

Government incentives and strategy is lacking

The result?

Industry

Uncertainty and an unwillingness to move en mass

Behavioural Shift in ALL is required

DECEMBER

	2024	2023	% change	Mkt share -24	Mkt share -23
BEV <3.5t	3,271	2,964	10.4%	12.0%	10.0%
BEV Rigid >3.5-4.25t	111	24	362.5%	0.4%	0.1%
Diesel <3.5t	22,851	26,072	-12.4%	83.6%	87.7%
Others <3.5t	1,099	665	65.3%	4.0%	2.2%

Year to date

	YTD 2024	YTD 2023	% change	Mkt share -24	Mkt share -23
BEV <3.5t	20,509	20,253	1.3%	5.8%	5.9%
BEV Rigid >3.5-4.25t	1,646	1,203	36.8%	0.5%	0.4%
Diesel <3.5t	320,559	312,669	2.5%	90.7%	91.2%
Others <3.5t	10,766	8,533	26.2%	3.0%	2.5%

Moving Mindsets

Fleet owners must **want** to procure zero emission vehicles NOT be forced into a decision which they feel uncomfortable in making

We as an industry and leaders must address the elements of the whole transition and the TCO piece BUT we need Government help.



Clients today tend to be in 3 camps



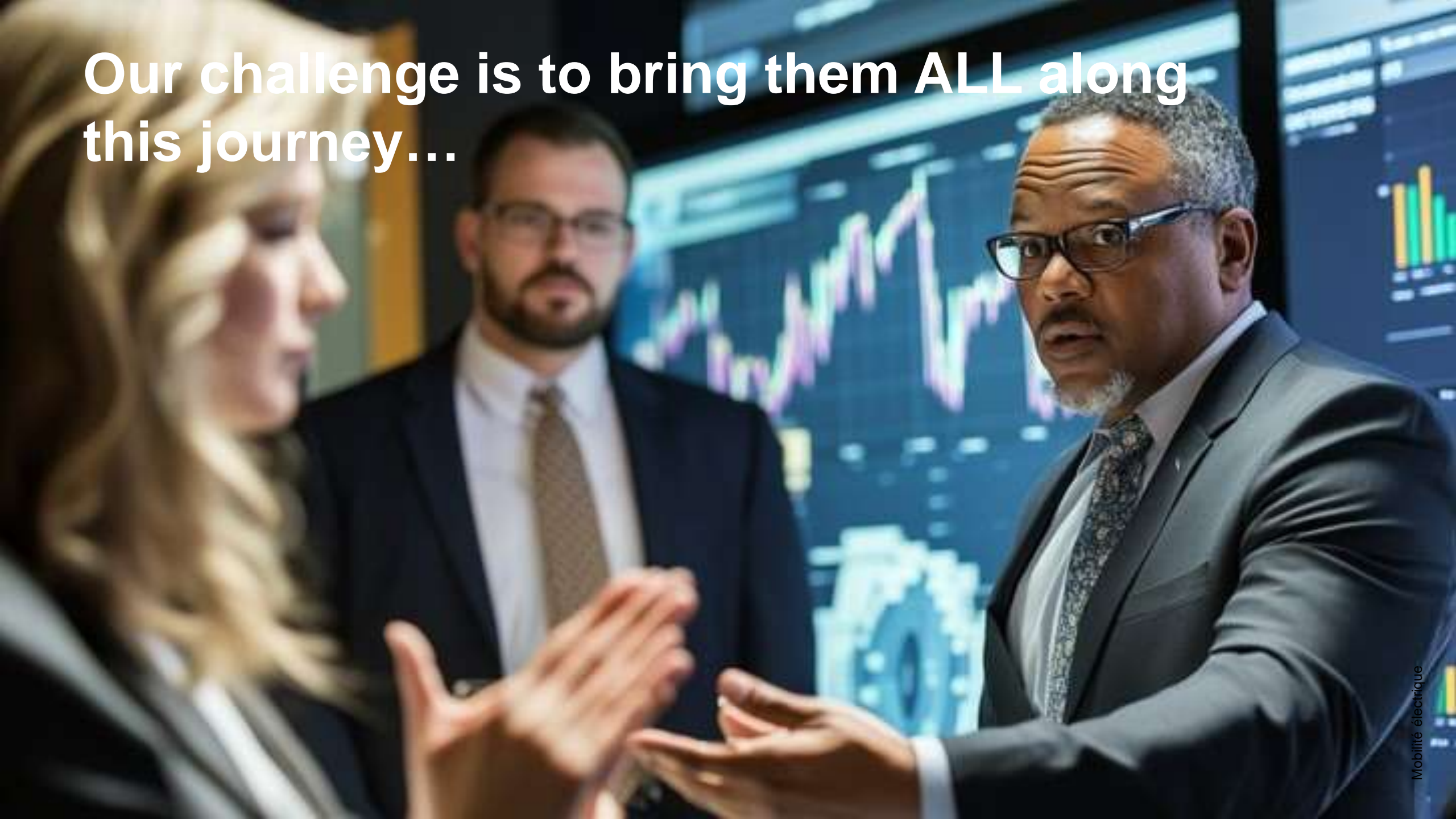
The *Bystander*

The *Interested*



The *Believer*

**Our challenge is to bring them ALL along
this journey...**



Understanding behaviour is key

We are dealing with humans – humans don't like change

Working with people and not just accepting change but embracing it

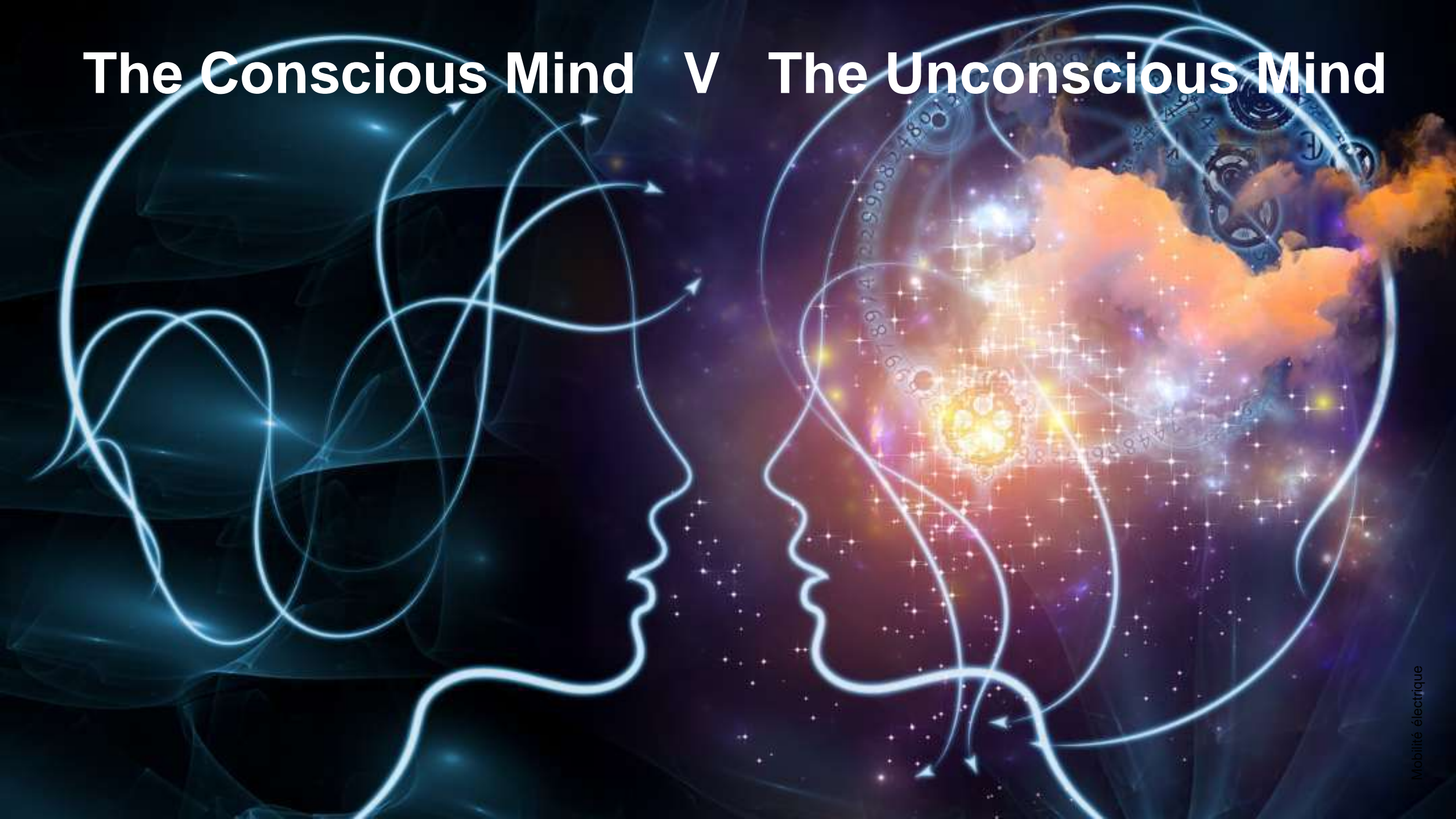
There is often a difference between how people say they are going to act and how they actually do

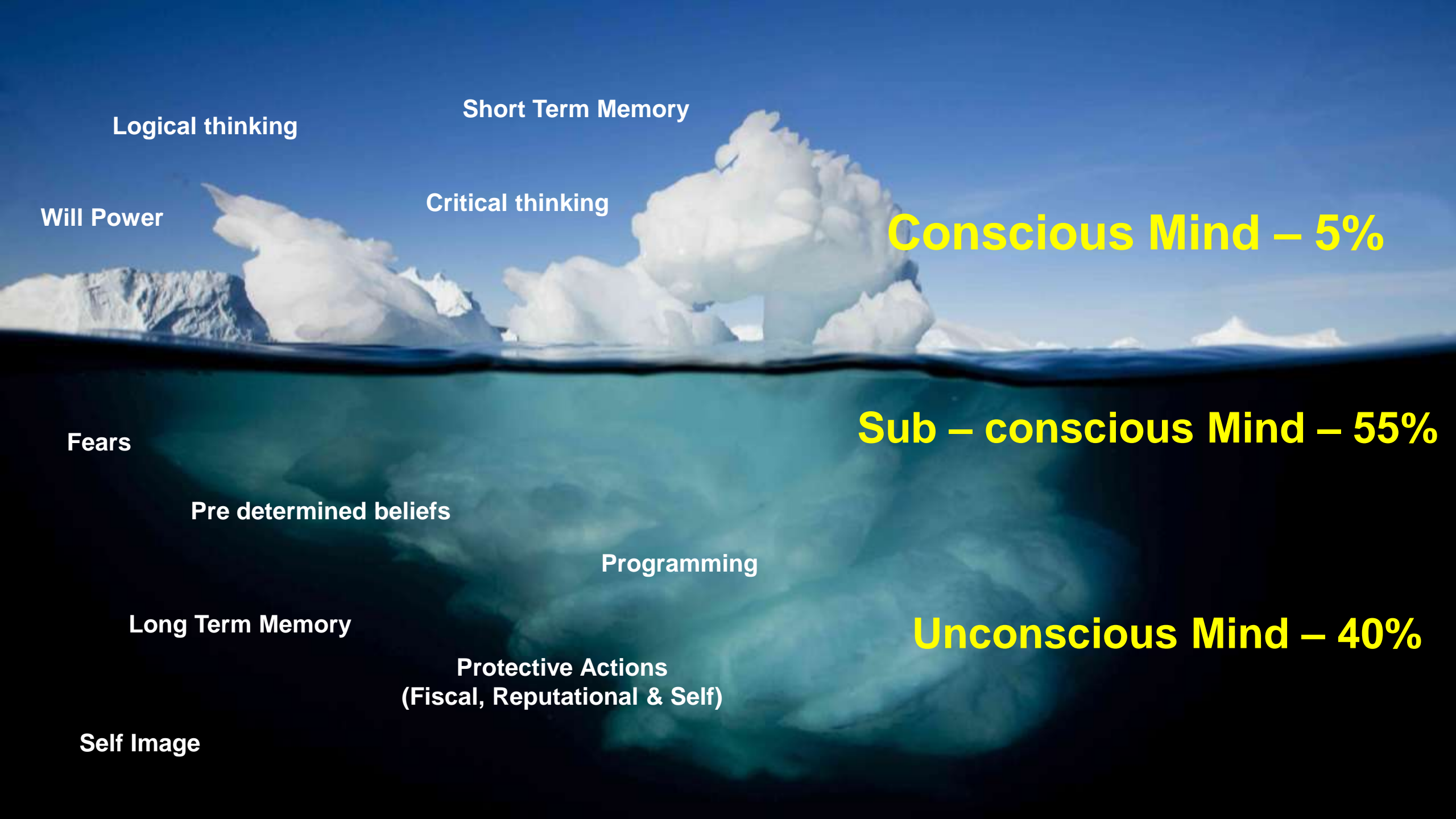
We must remove the “Friction of Change” as every stakeholder has a key role to play

Pure regulatory pressure alone will not succeed

We need to incentivise, educate and guide not just tell and instruct

The Conscious Mind V The Unconscious Mind





Logical thinking

Short Term Memory

Will Power

Critical thinking

Conscious Mind – 5%

Fears

Sub – conscious Mind – 55%

Pre determined beliefs

Programming

Long Term Memory

Unconscious Mind – 40%

Protective Actions
(Fiscal, Reputational & Self)

Self Image

In many cases, barriers of resistance have already been conquered.

TCO

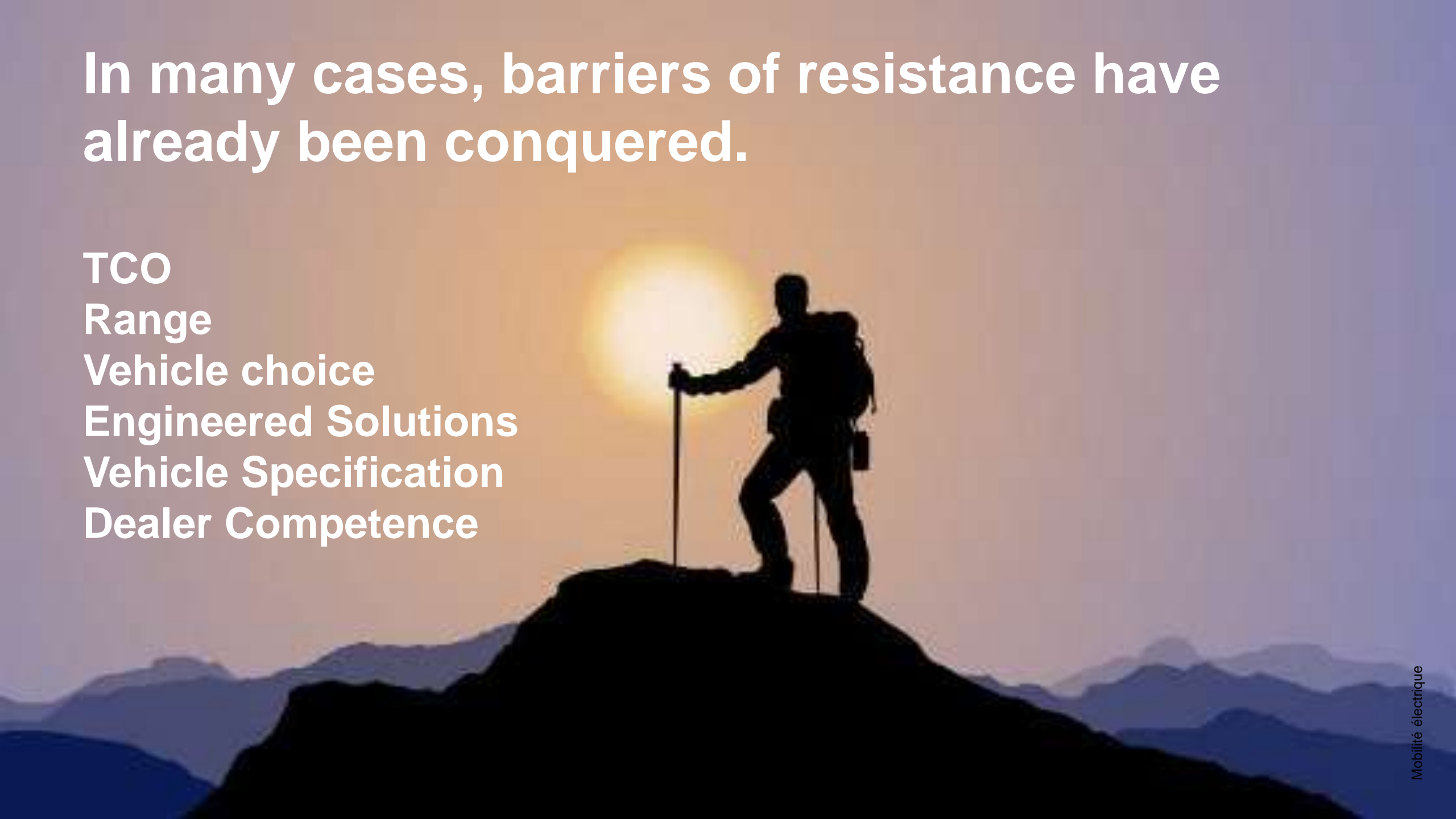
Range

Vehicle choice

Engineered Solutions

Vehicle Specification

Dealer Competence



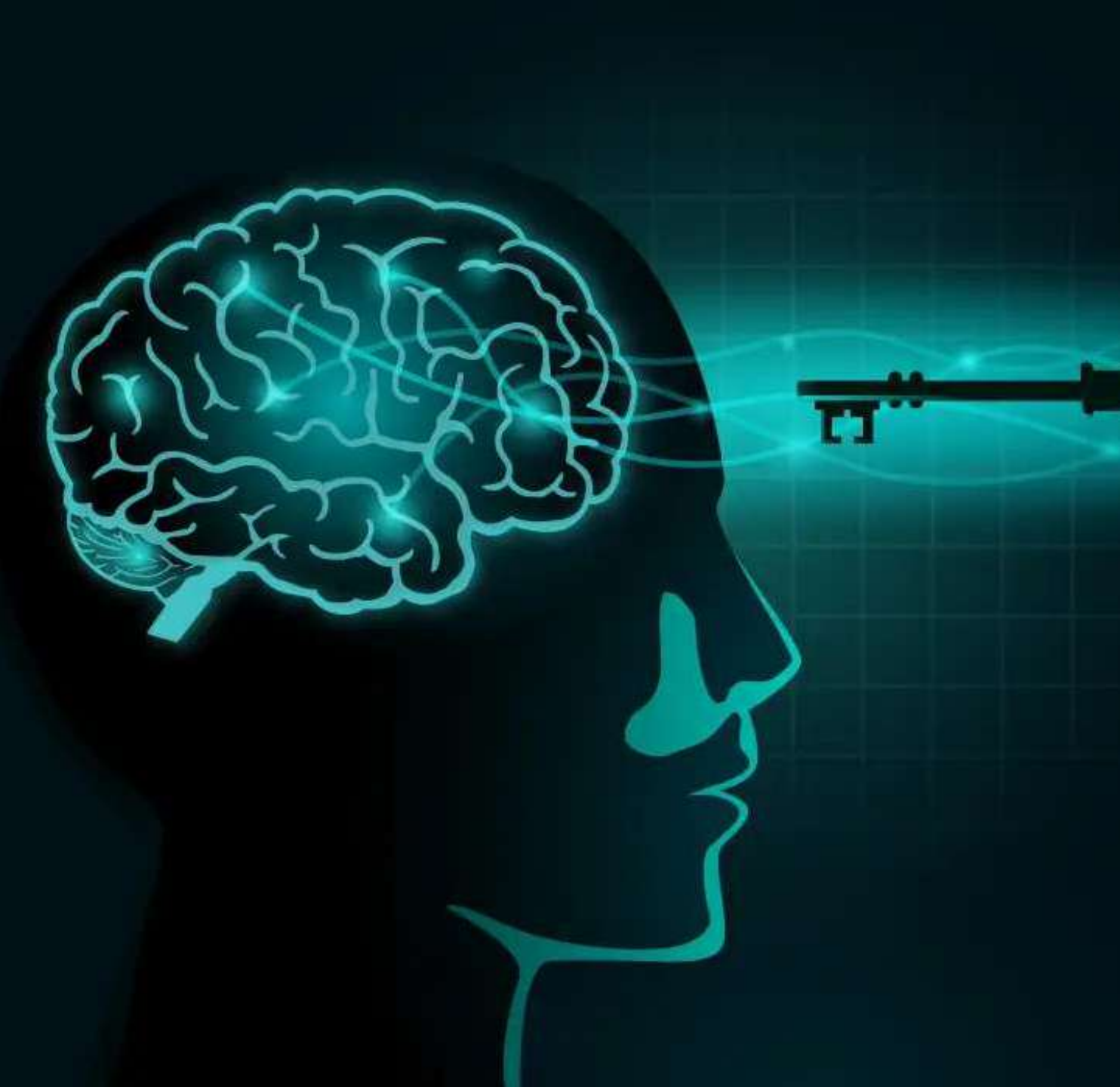
**We MUST come together and address the multiple challenges together
at one for like an Orchestra, its only works as a team**



There is no silver bullet



**Transition will require a change of mindsets and
multi layered co-operation underpinned by
dynamic Government strategy**



Changing the mindset of the many not the few





Local planning needs to acknowledge the need for more space to address our needs in the truck industry

Delivery in the new era: How deliveries went electric - Renault Trucks in Paris (EP 01)



**We need
Government to
provide a proper
Roadmap and
fiscal incentives
to drive change**

Industry alone cannot make this happen



**RENAULT
TRUCKS**

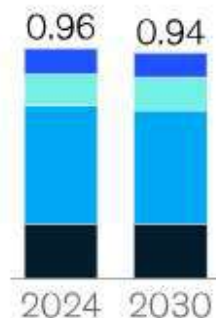
Reaching parity in zero-emission truck total cost of ownership by 2030 will require a significant reduction in energy and depreciation costs.

Heavy-duty line-haul truck (40-ton tractor); 350 km daily range (90K km per annum); 350 kW engine power

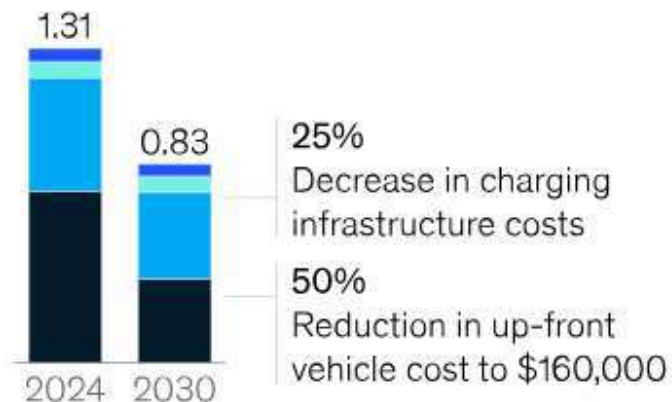
Total cost of ownership (TCO) in Germany
\$/km

Depreciation Energy¹ Tolls Maintenance

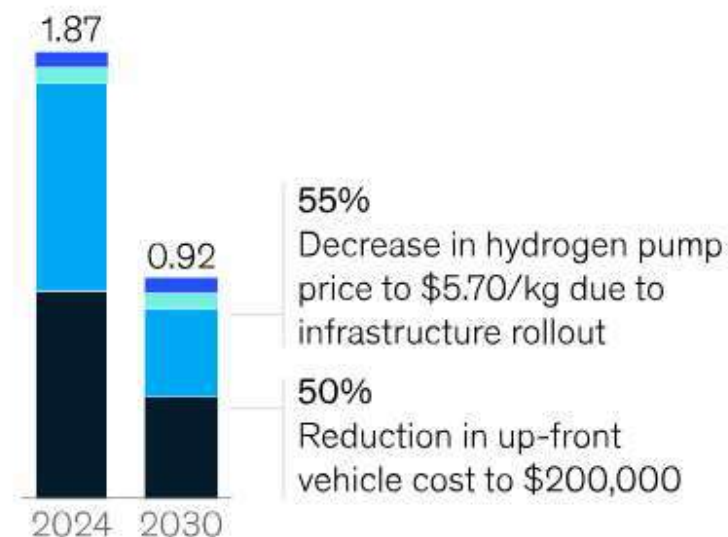
Internal-combustion engine



Battery electric vehicle



Fuel-cell electric vehicle



¹Includes distributed cost of charging infrastructure required for battery electric vehicle (assumes ~30% of on-the-go charging).

²Energy prices: diesel, \$1.49/l in 2024, \$1.52/l in 2030; electricity, \$0.21/kWh in 2024, \$0.17/kWh in 2030; hydrogen, \$11.90/kg in 2024, \$5.70/kg in 2030.

Source: McKinsey Center for Future Mobility



**We need to remove the
“Friction of change” to
make it easy because
every stakeholder has an
active role to play.**



**RENAULT
TRUCKS**



Can Decarbonisation be a Blended Solution?

Electromobility

HVO

Gas (CNG / LNG)

Hydrogen

eFuels

Diesel – Euro 7 and beyond



**RENAULT
TRUCKS**

Some truck designs need other routes to transition due to operational constraints - FACT



HVO - Government quotas for Construction / Off Road like Norway??



Info legend:

Country: Name of the funding program

- Supported powertrains of trucks
- Maximum subsidy amount per truck or undertaking¹

≥ 80% price difference² or ≥ €160k

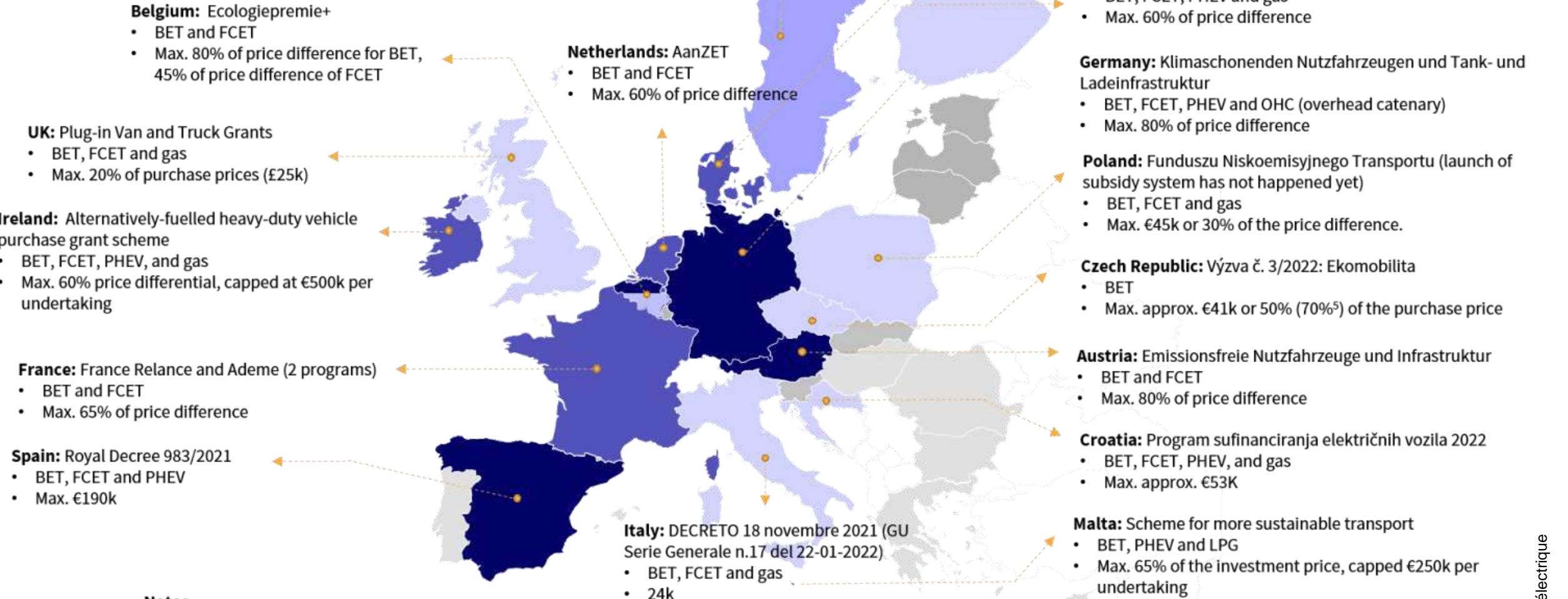
≥ 60% price difference

≥ 40% price difference or ≥ €80k

≥ €20k

No purchase incentives³

No available information



Notes

1. Average purchase prices (excl. VAT) for the different powertrains have been standardised, taking the percentages of the price difference as a baseline for all countries. The per-vehicle sums can be lower depending on truck weight and drivetrain.

2. The price difference refers to the difference in purchase price between the zero- or low- emission truck and its diesel equivalent.

3. Countries with no purchase incentives have been confirmed by the responsible ministries.

Current UK Government Actions

PiVG – (Plug in Vehicle Grant) remains for a further 12 months out to 31/03/26

Meaning on vans a **£5000 incentive** on a new purchase

PiTG – (Plug in Truck Grant) remains for now and offers **up to £25,000 incentive per vehicle**

ZERFD (Zero Emission Road Freight Demonstrations) – Project launched 2023

Funding towards Operators purchasing electric HGV's and Infrastructure

Weight Dispensation for gross vehicle weights of +2 tonnes within axle loads.

Passed July 2023 but not above 44T GTW.

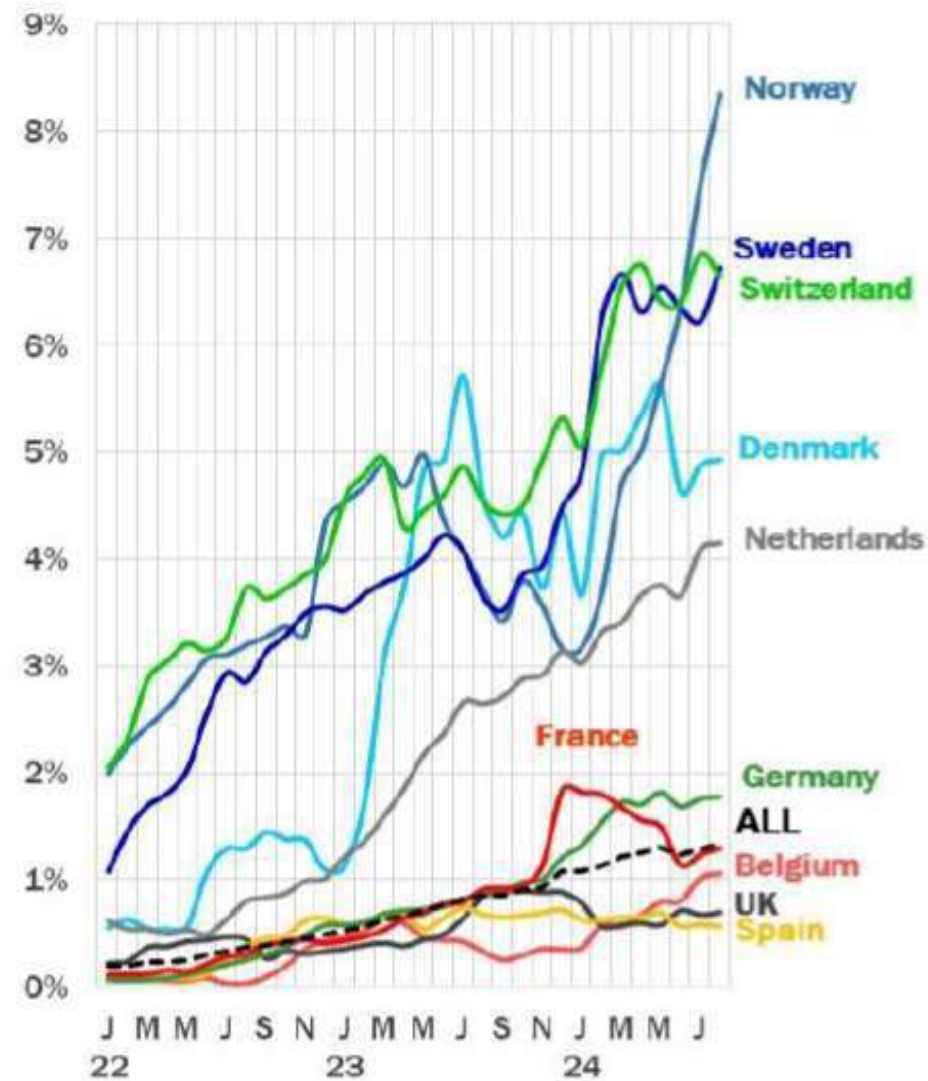
Charging Infrastructure Project upcoming – call for evidence and comments from DfT



Incentives do work



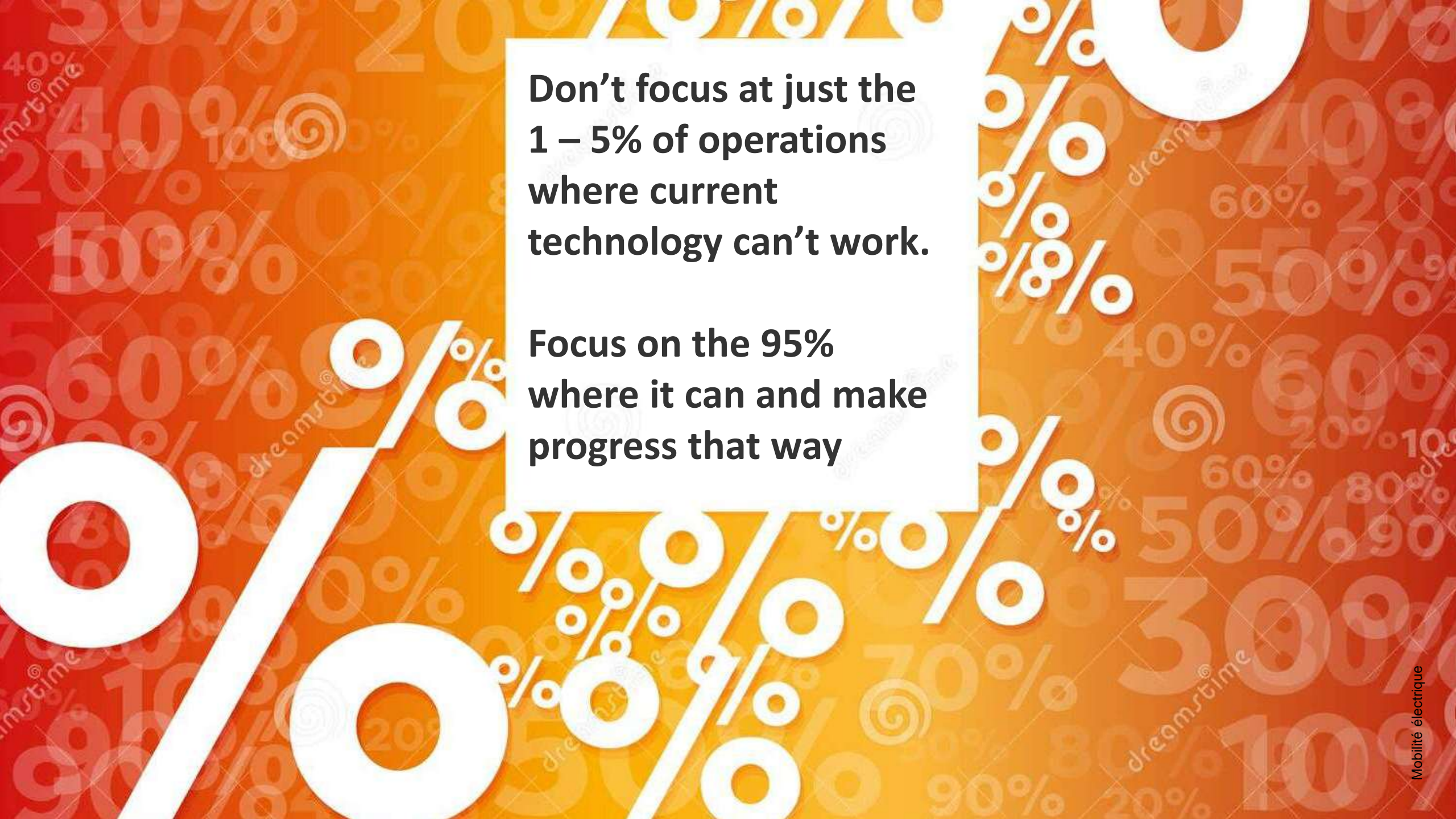
Electric trucks penetration in countries - All OEMs
6-month rolling average



make it easy.

Solutions outside of Government

Despite peoples concerns, there are solutions available today



**Don't focus at just the
1 – 5% of operations
where current
technology can't work.**

**Focus on the 95%
where it can and make
progress that way**

Which part of your business can be changed?





Your own R&D opportunity – available now, today

Vertellus know that changing from diesel to electric poses many challenges – and is far more complex than simply switching to a new vehicle.

Businesses also need to understand...

- **Financing**
- **Power supply**
- **Route range**
- **Charger installation**
- **Route scheduling**
- **Driving style**

**Sweating the Asset in the future will become
more prolific**



Renault Trucks Master 4



460kms range & 130kW DC charging speed
Double Shifting now feasible
Asset efficiency enhanced

E-TECH





Embracing new models of working together

New thinking, New collaborations, New Out of the Box ways



Mutual Cooperation

Collaborative thinking with other like minded hauliers



Co-operation and joint initiatives are vital

Portable DC Charging Hubs & HGV Skid solutions

- Simultaneously offering 1MW charging
- Quick to install, Expanded storage, Flexibility
- Reconfigure, Relocate or expand in future



VOLTEMPO™



Harnessing the earth's natural resources

20% of the UK's largest warehouses could provide 75 million m² of solar space

The UK's current warehouse roof space could generate up to 15GW of NEW solar power saving Logistics industry some £3 Billion per annum

Saving some 2 Million tonnes of CO₂ per annum

But most of all, it could be a self generator of electricity for our industry and of course provide your own source of power.

Sunsetting Strategies



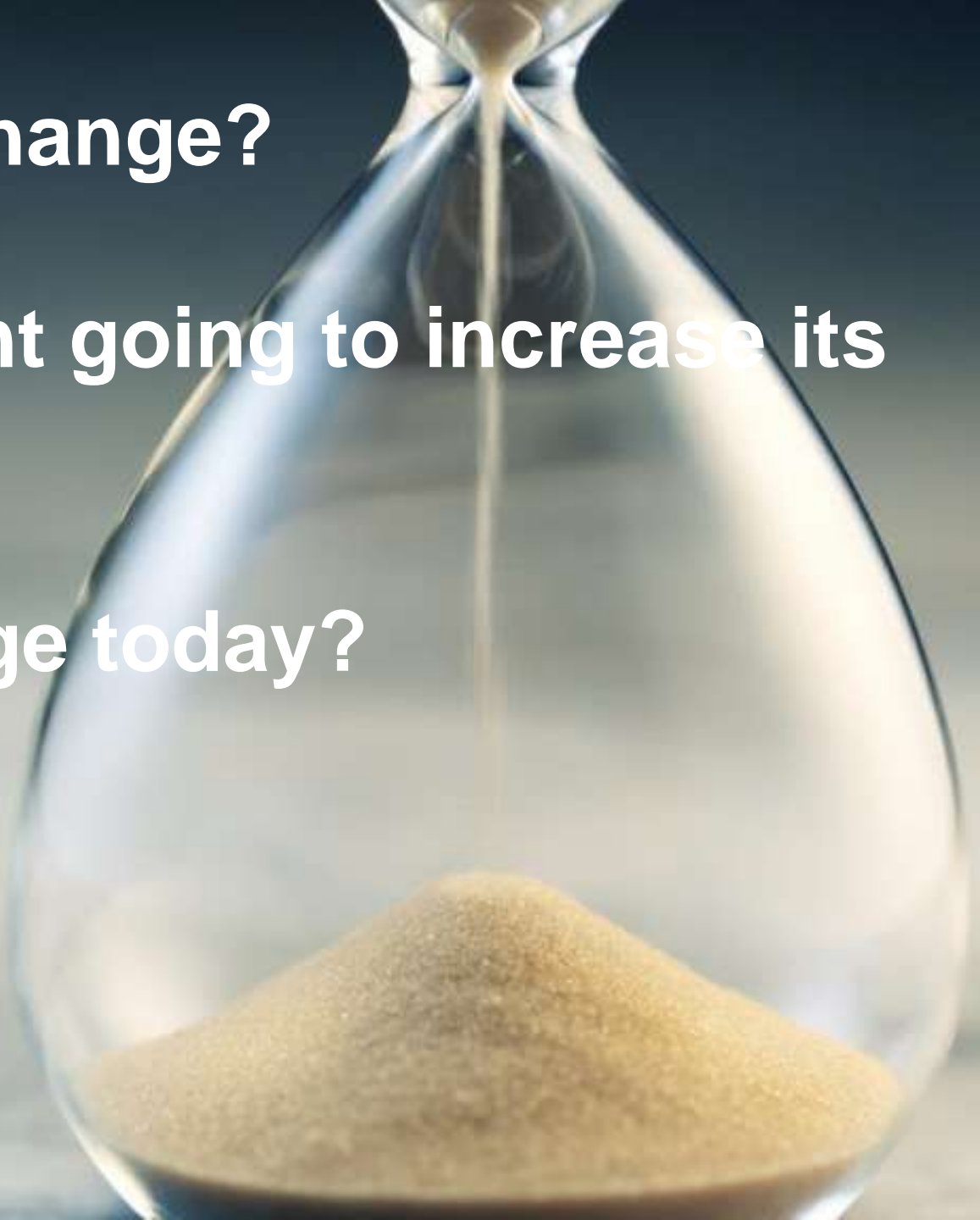
But ICE will still be with us for many years including developments into Euro VII

Will your mindset change?

When is Government going to increase its action?

What can you change today?

Time is running out






RENAULT
TRUCKS

Over 31 million
Kms travelled
with clients
trucks

Over 30,200
tonnes of CO2
saved



A close-up photograph of a European Starling perched on a green plastic bird feeder. The bird's wings are spread, showing the intricate patterns of its feathers. The feeder is filled with a mix of seeds and small pieces of food. The background is a soft, out-of-focus green, suggesting a natural outdoor setting. The text "The Art of the Possible" is overlaid in the center of the image.

The Art of the Possible

New for 2025



Welcome to the Renault Trucks corporate website

EN

FR

All websites

Contact



About Renault Trucks

Transport and urban logistic solutions

Electromobility

Towards low-carbon transport

Circular economy

Careers

Newsroom

Trucks

Services

Used trucks

Urban logistics solutions

Find a dealership

December 2022



> Welcome to The Good City

Share



24 MARCH 2025

Welcome to The Good City

Revolutionise your business and protect the environment

Are you ready to embrace the electric revolution? Welcome to **The Good City**, an immersive 3D environment showcasing real-world decarbonised transport solutions in operation across Europe.

Electromobility in action: Assess the potential of electric solutions for your industry.

A zero-emission future: Imagine 2030, when one in two Renault Trucks will be electric, and 2040, when 90% of our vehicles in operation will run without fossil fuels.

Tangible benefits: reduce noise reduction, enhance brand image for both hauliers and transport in general, and seize real competitive opportunities.

Product Platform – V0

2027.....



Thank you



RENAULT TRUCKS

Grahame Neagus – Head of LCV & Municipal UK & Ireland
e - grahame.Neagus@renault-trucks.com