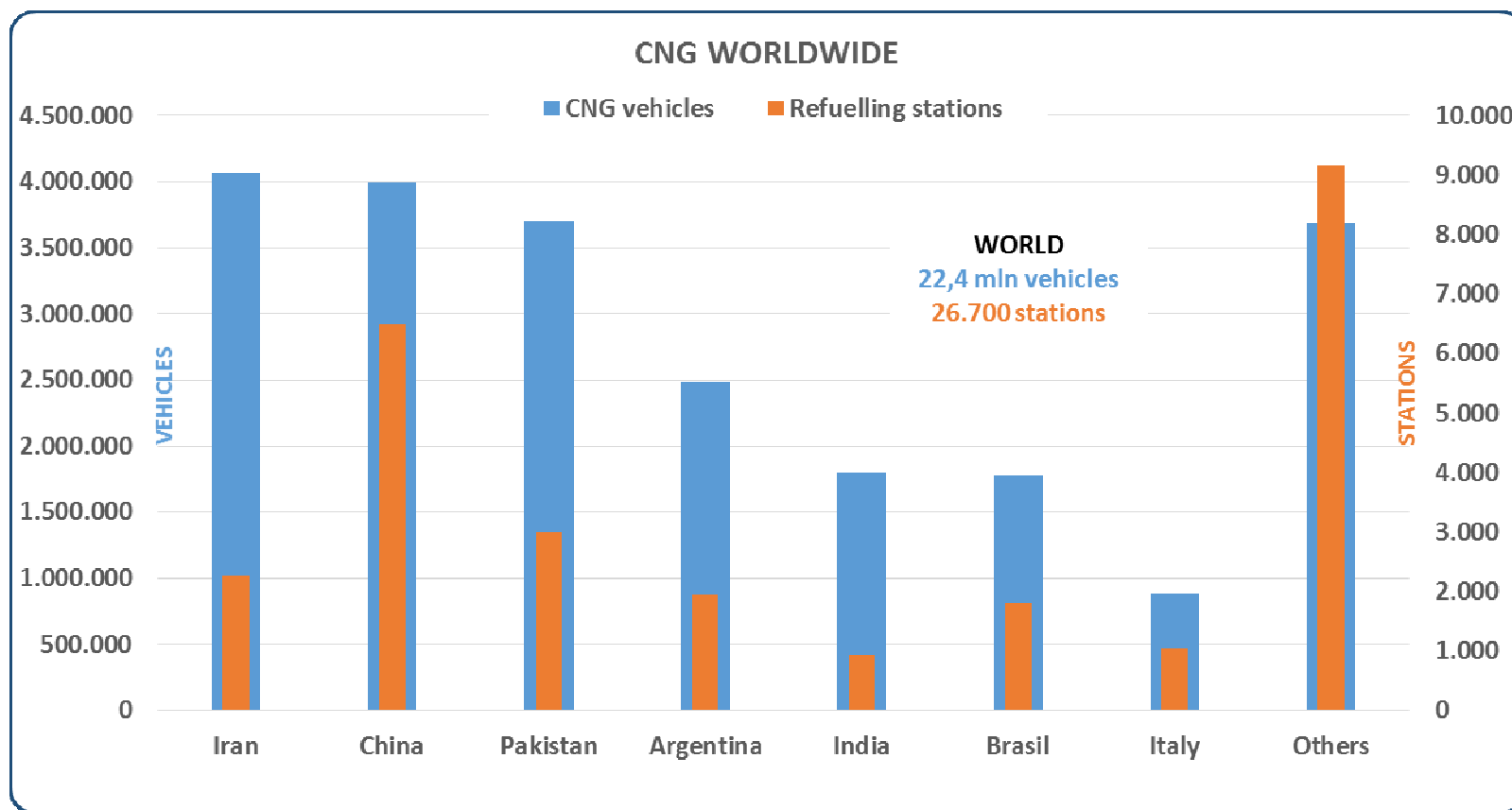




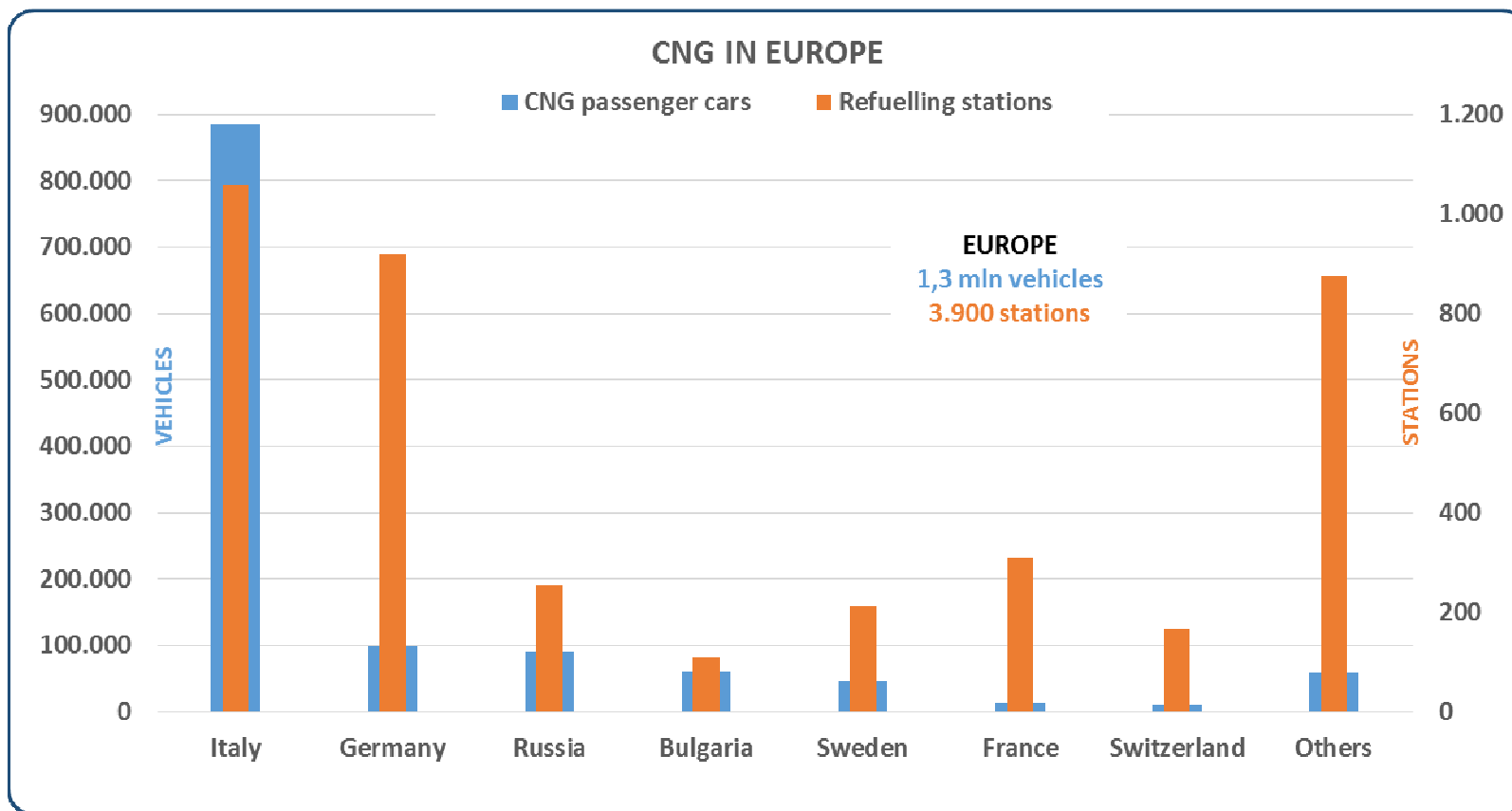
THE CNG ITALIAN MARKET

A JOURNEY FROM WORLDWIDE FIGURES TO ITALIAN ONES



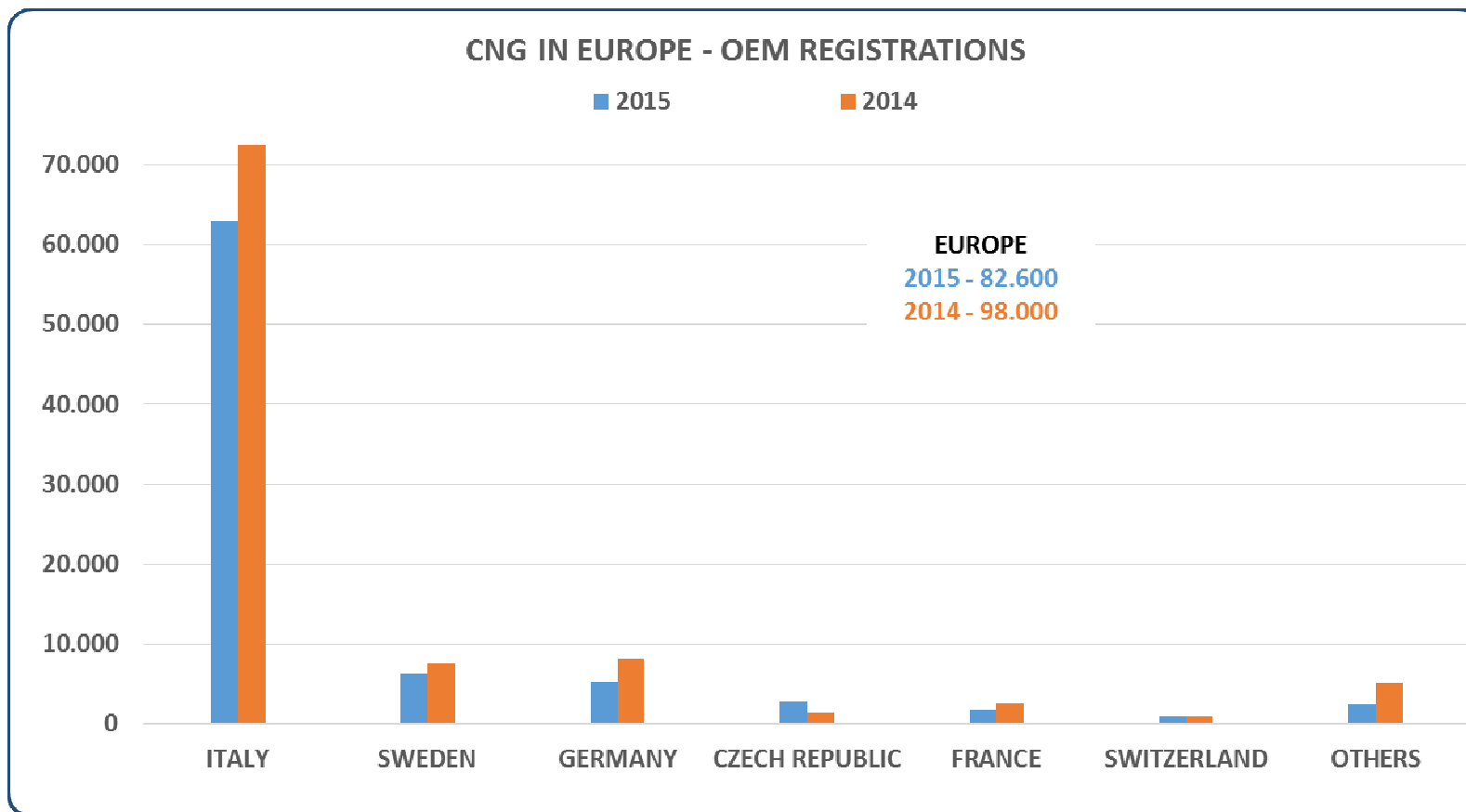
- CNG is use vehicles can still grow in China, where vehicles/filling station ratio is 614 while > 1,000 in other countries
- The same as above in Italy (835) and «others» (400)

Source: The GVR



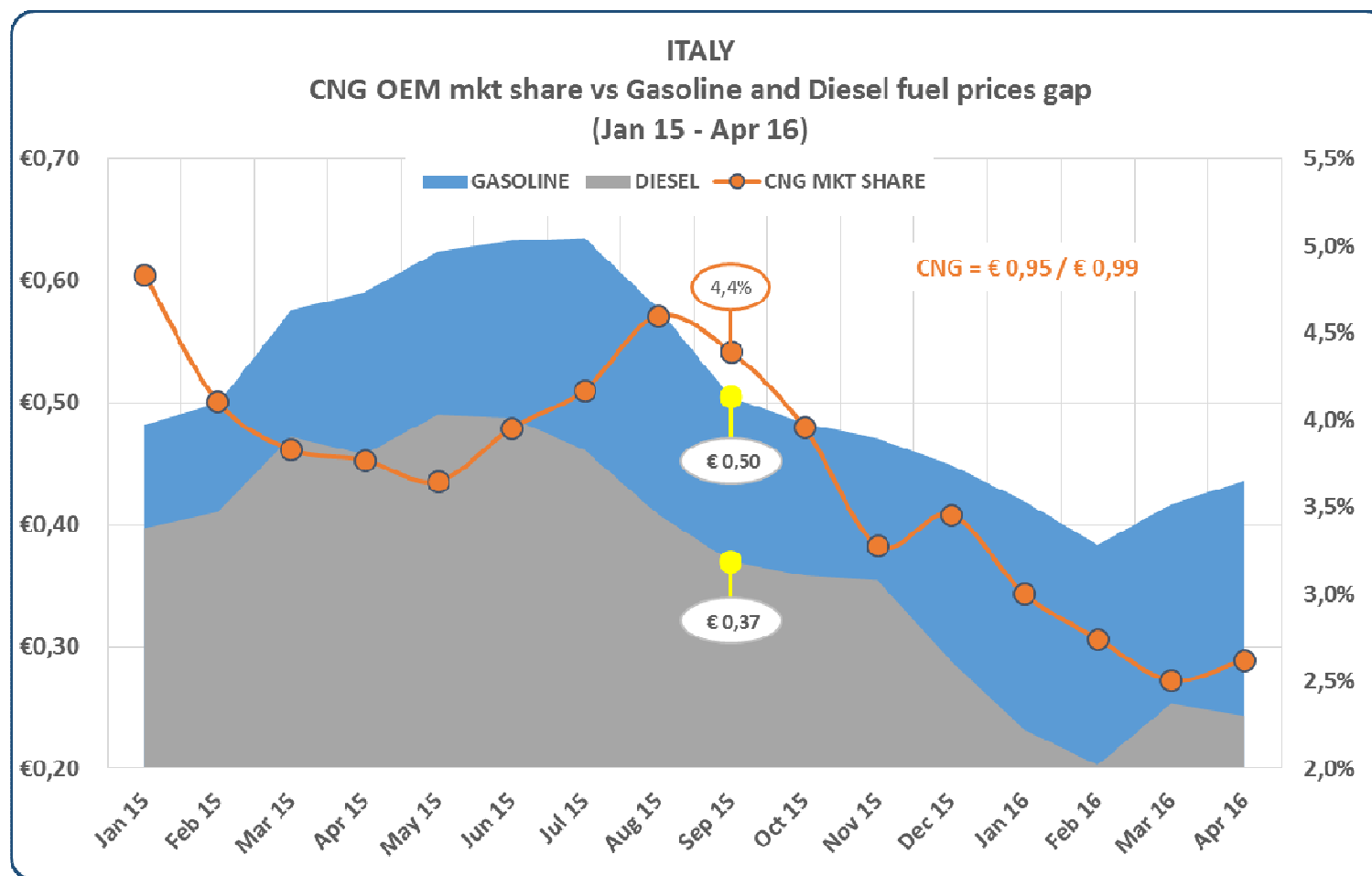
- **ITALY is by far #1 for in use CNG passenger cars in Europe (68% of Europe)**
- **Filling CNG stations network allows further growth in other countries**

Source: The GVR

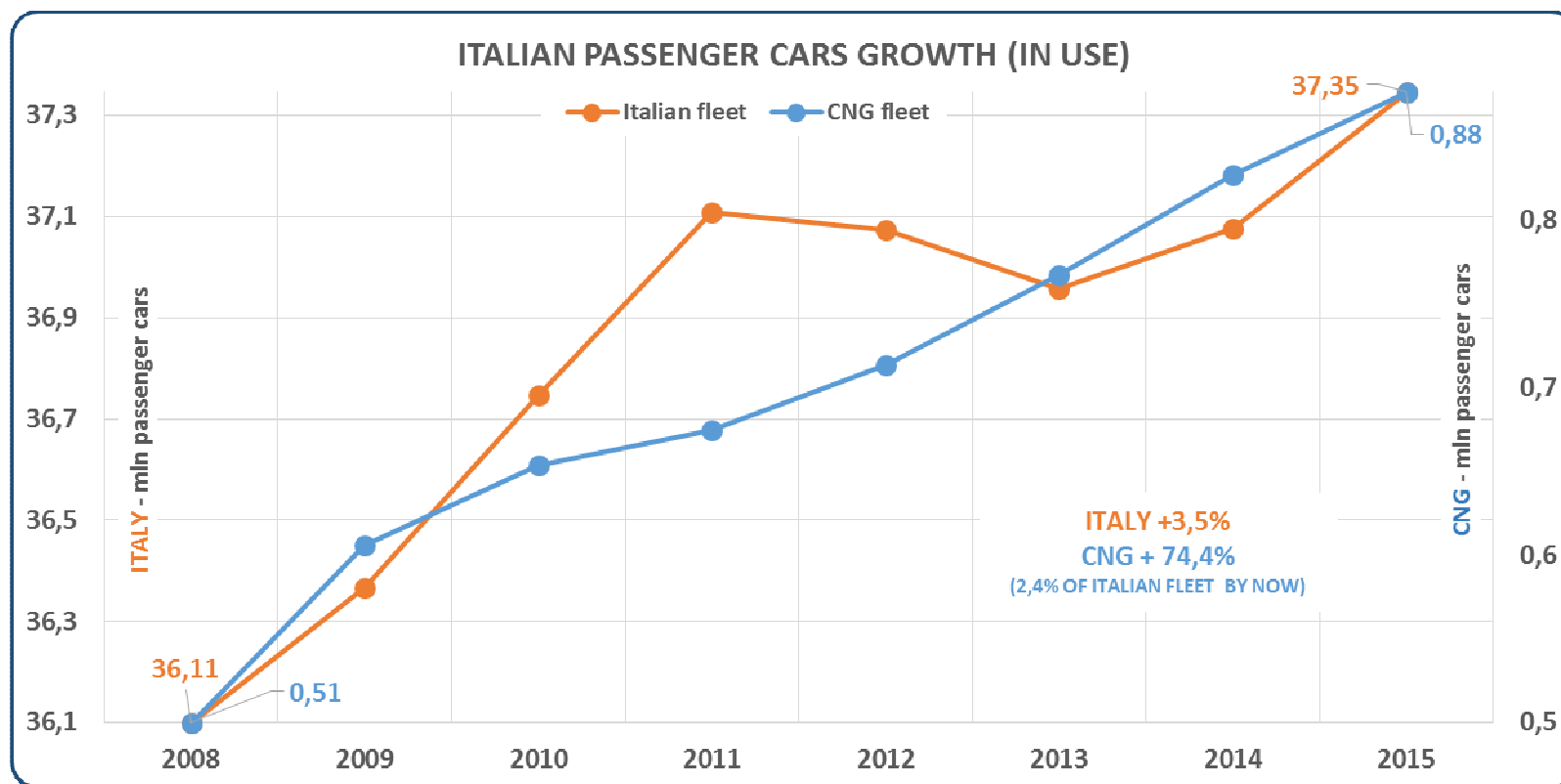


- **ITALY is by far #1 for CNG passenger cars OEM registrations in Europe (76% in 2015, 74% in 2014))**
- **Decrease of 2015 volumes mainly due to lower fuel price gap compared to gasoline and diesel**

Source: Anfia



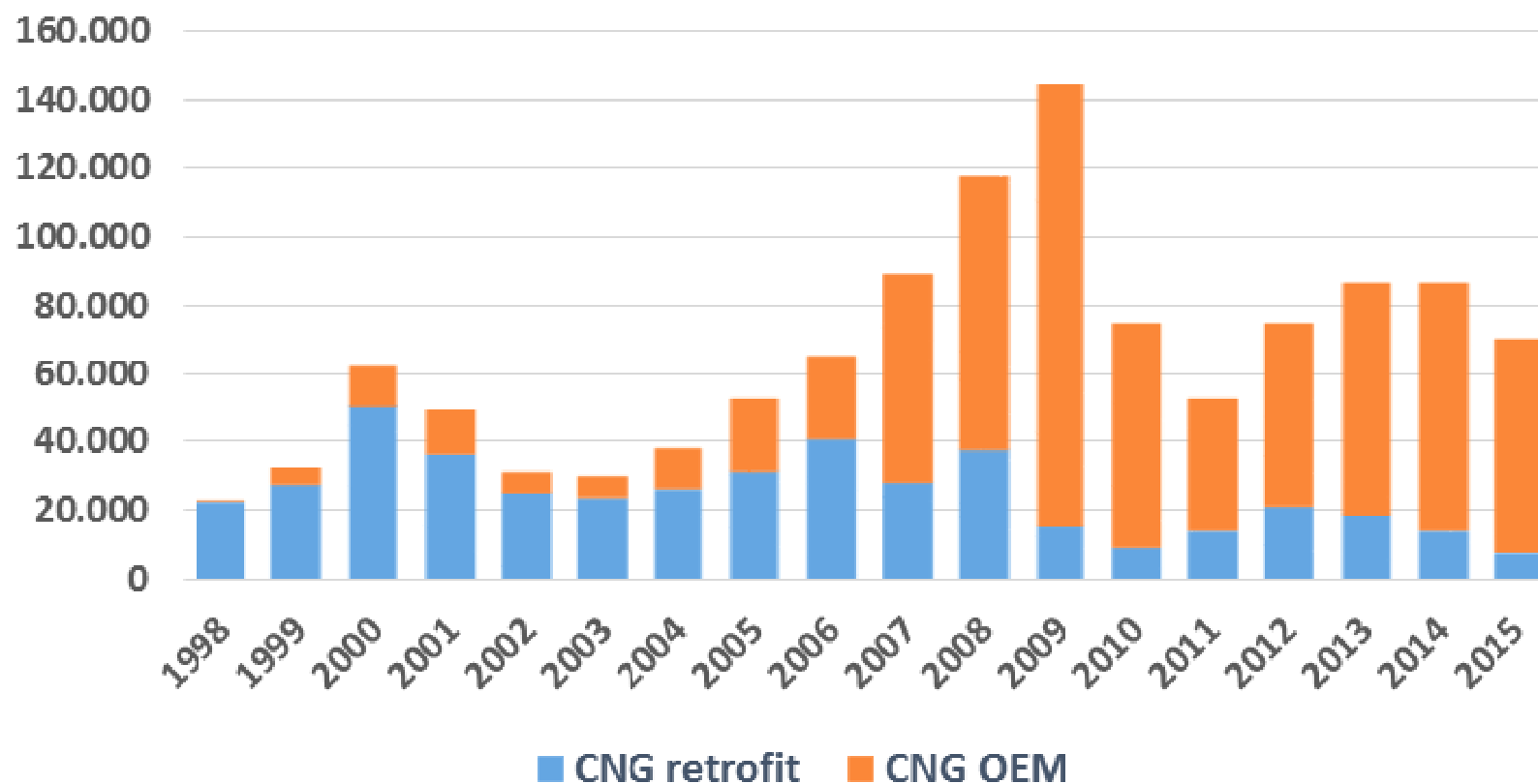
- CNG OEM market share in Italy decrease after summer decrease of fuel price gap
- € 0.50 gap to gasoline and € 0.40 gap to diesel seems to be «psychological borders» for economic save perception



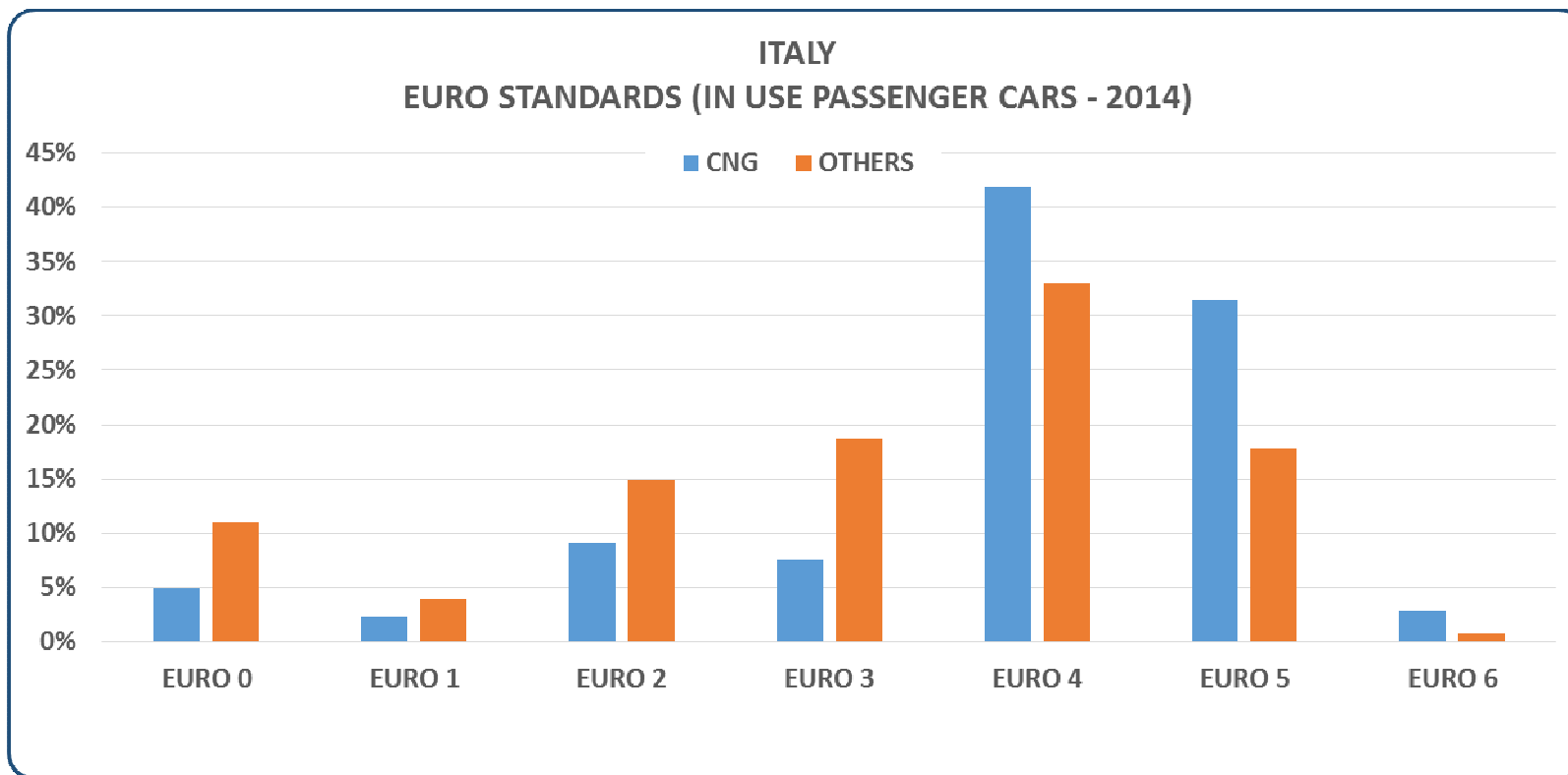
- CNG passenger cars growth has been huge if compared to global italian one during last 7 years

Source: ANFIA

CNG ITALIAN MARKET SINCE 1998

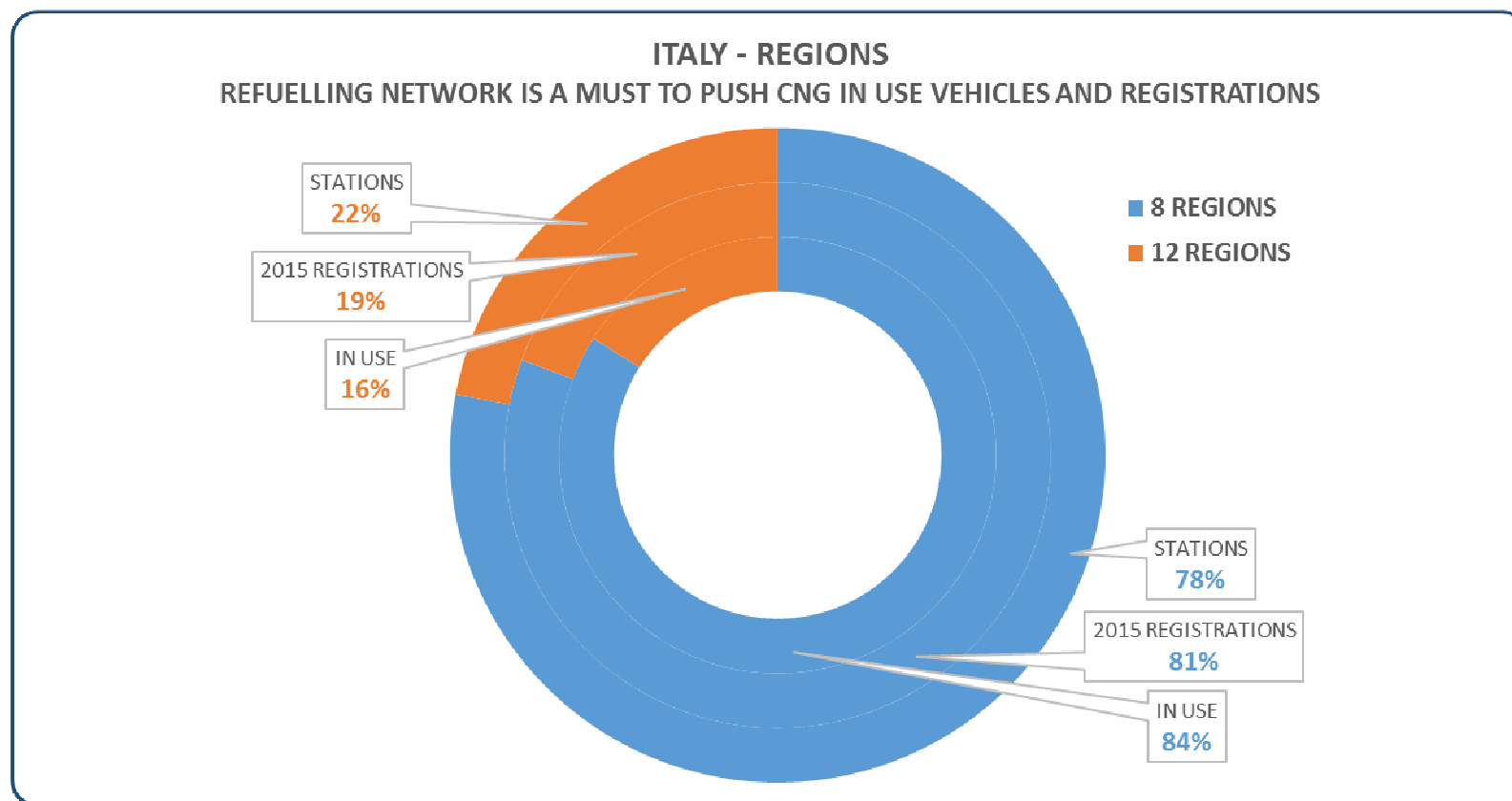


Source: ANFIA and Ecogas



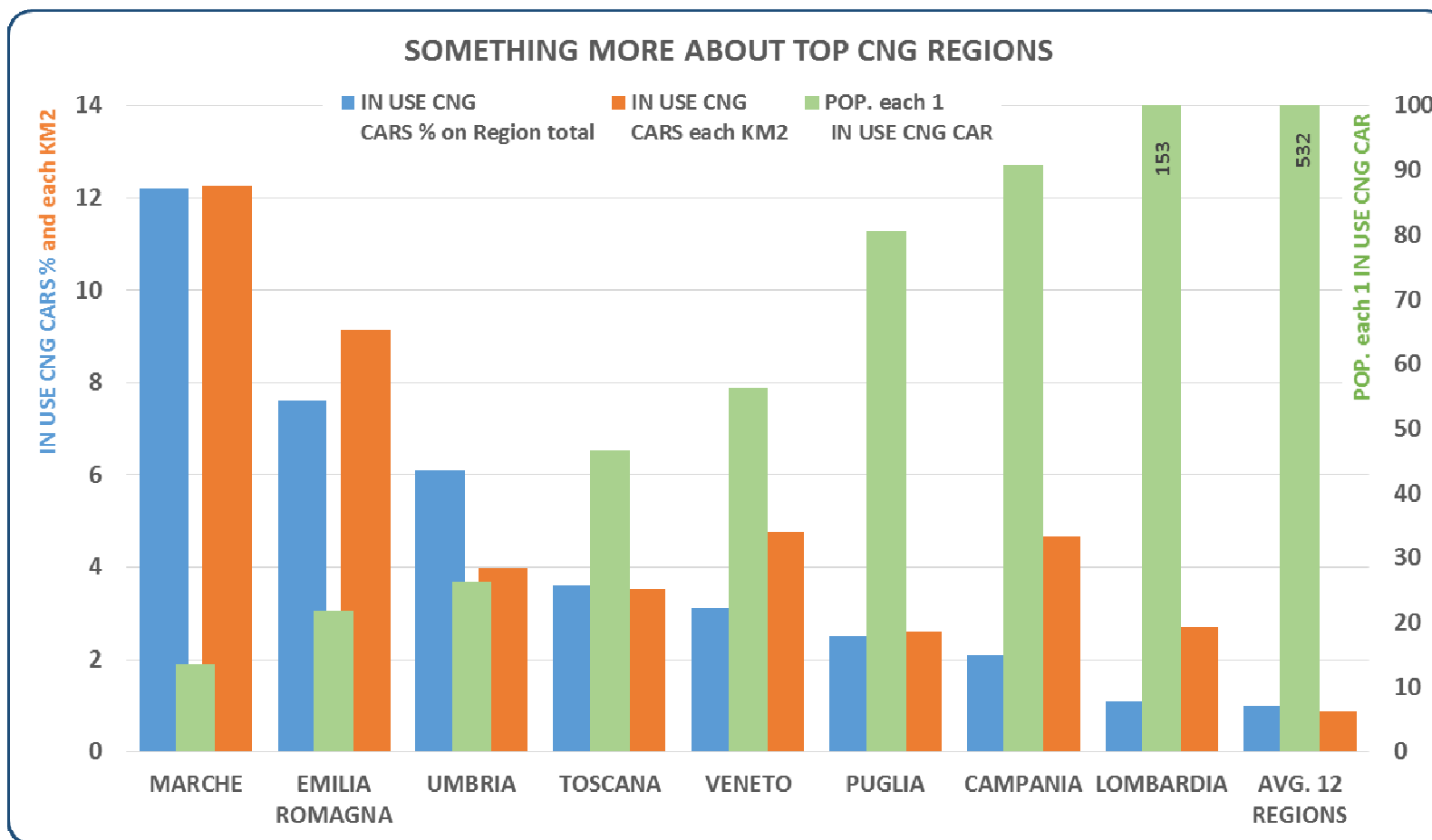
- CNG passenger cars are newer and thus more green than average of other fuels

Source: ANFIA



- Also if Italy is a «success case history» for CNG, future market could be much better if
- CNG filling stations network will be located in 12 among 20 regions as well !!!!
- DAFI (european Directive Alternative Fuel Infrastructure) is a leverage to get this goal ???

Source: ANFIA



- while CNG vehicles % on regional global in use cars decreases, population/cng cars ratio grows
- Evidence of a balance between CNG cars regional penetration and CNG cars/km2 ratio (not in Campania and Lombardia)

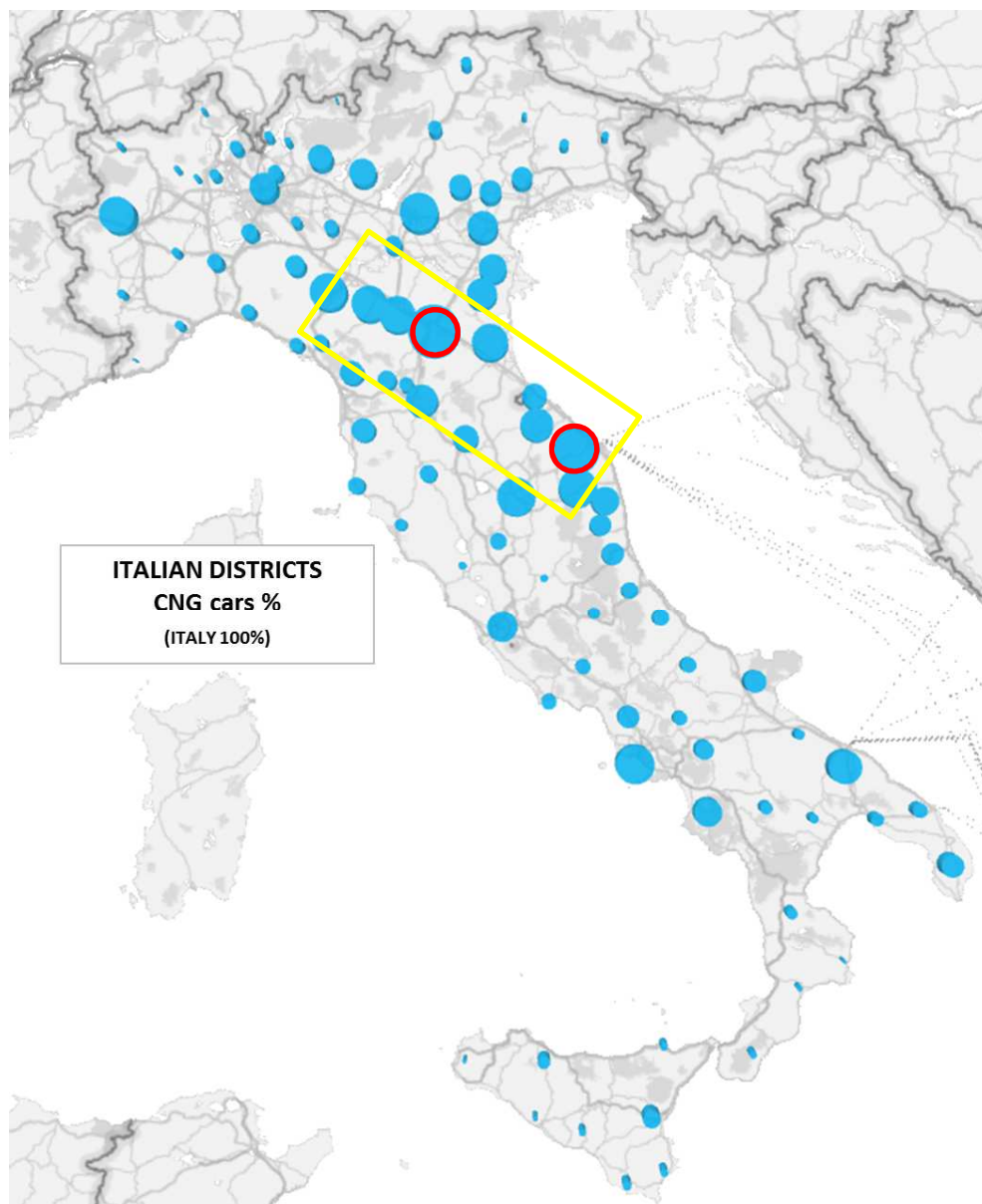
Source:

Let's have a look to:

1. CNG filling stations locations ...

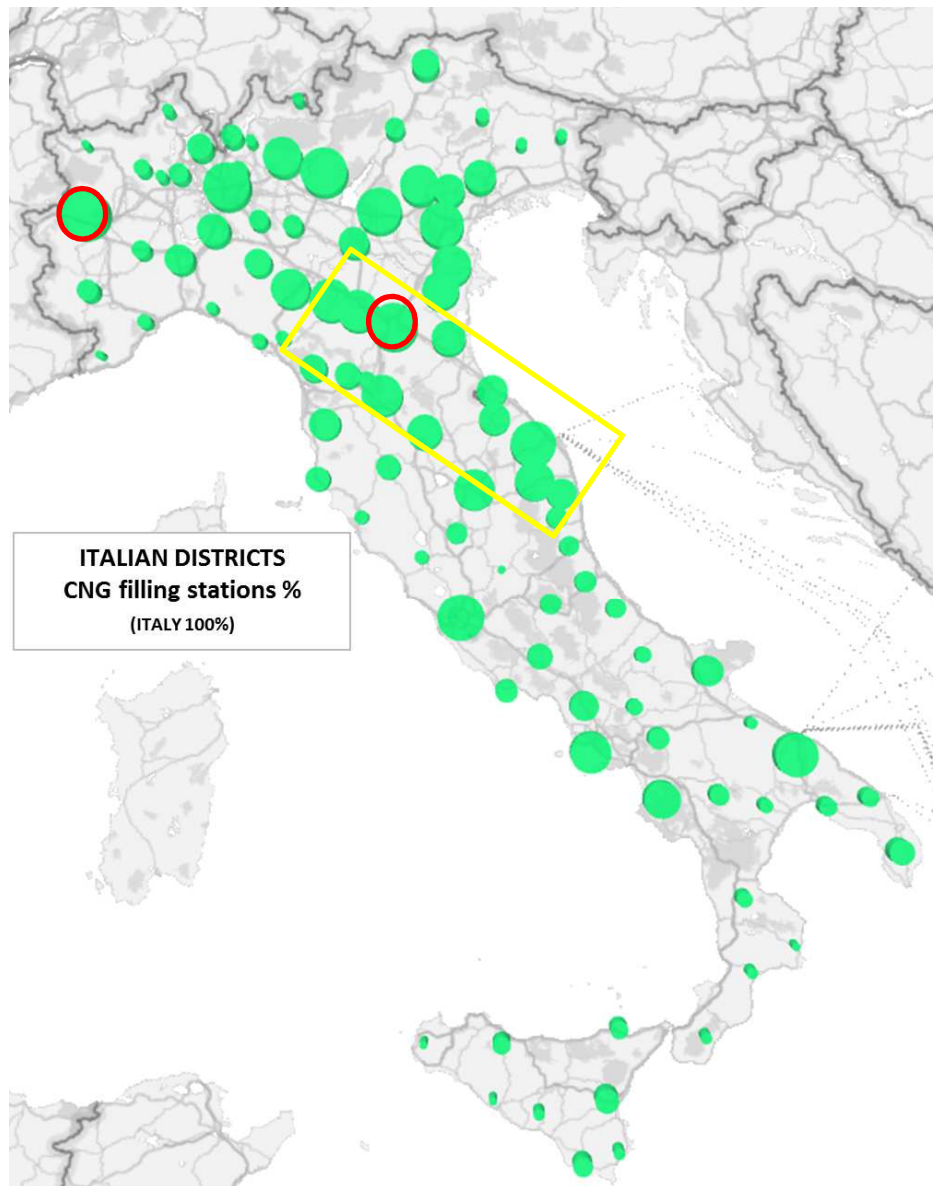


Source: NGV Italy drawing from various sources



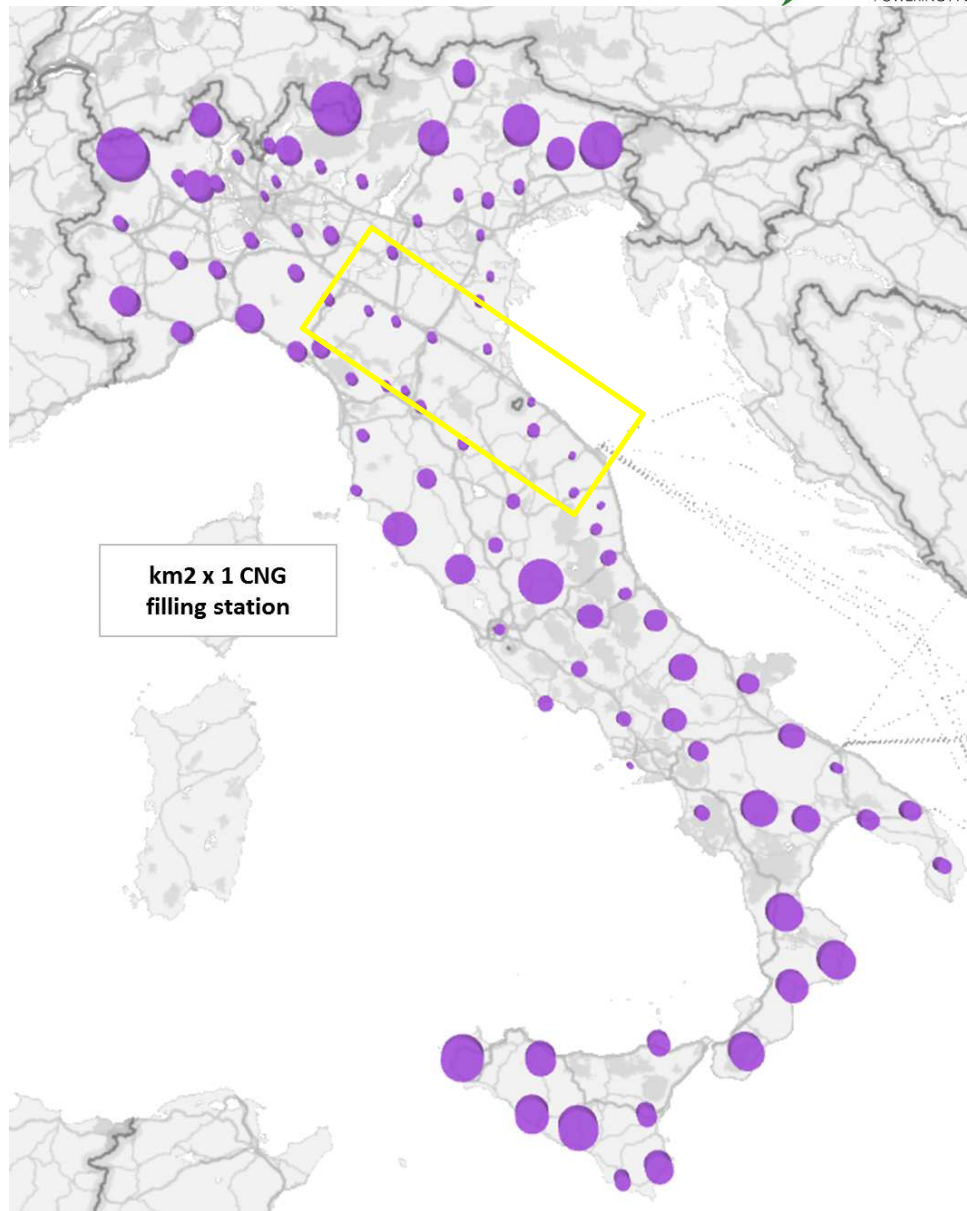
**2. In use CNG cars
districts penetration ...**
(e.g. Ancona 13,8%, Bologna 8,6%;
italian average 2,2%)

Source: NGV Italy drawing from various sources

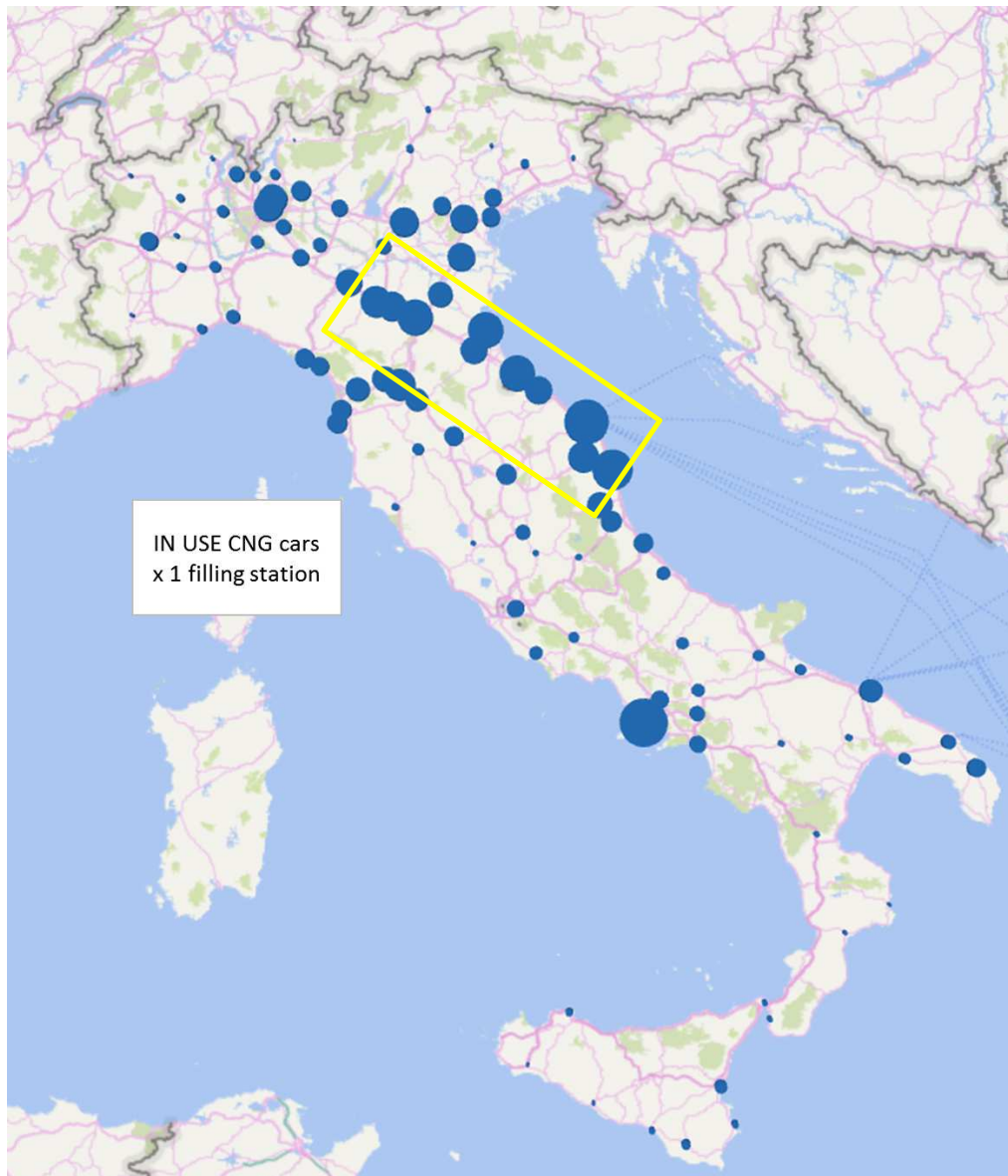


3. Districts CNG filling stations weight on global italian CNG network... (e.g. Torino 3,5%, Bologna 3,1%)

Source: NGV Italy drawing from various sources



**4. district average Km²
for each CNG filling station
(e.g. Napoli 49, Bologna 119;
italian average 272)**



**5. in use CNG cars/filling station
district ratio**
(e.g. Bologna 1,500; italian average 796)



CONCLUSIONS

- **Italy is since decades the bigger market in EU**
- **It is nevertheless a market with further growth potential: 12 regions among 20 still show a poor CNG stations network**
- **Filling stations network is a «must» to make this potential come true: clear link between stations network / registrations / in use vehicles**
- **DAFI is a leverage for european countries but for Italy as well**

THANK YOU !!!



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1996 - 2016

