

# Sustainable Commercial Vehicle Survey

Linking offer & demand

20.10.2023

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**an  
post**

**For your world**

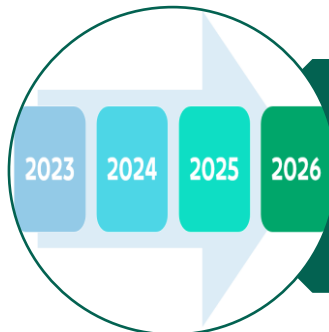
# Main Aims of the Survey



Determine the viable options for zero emission & sustainable commercial vehicles

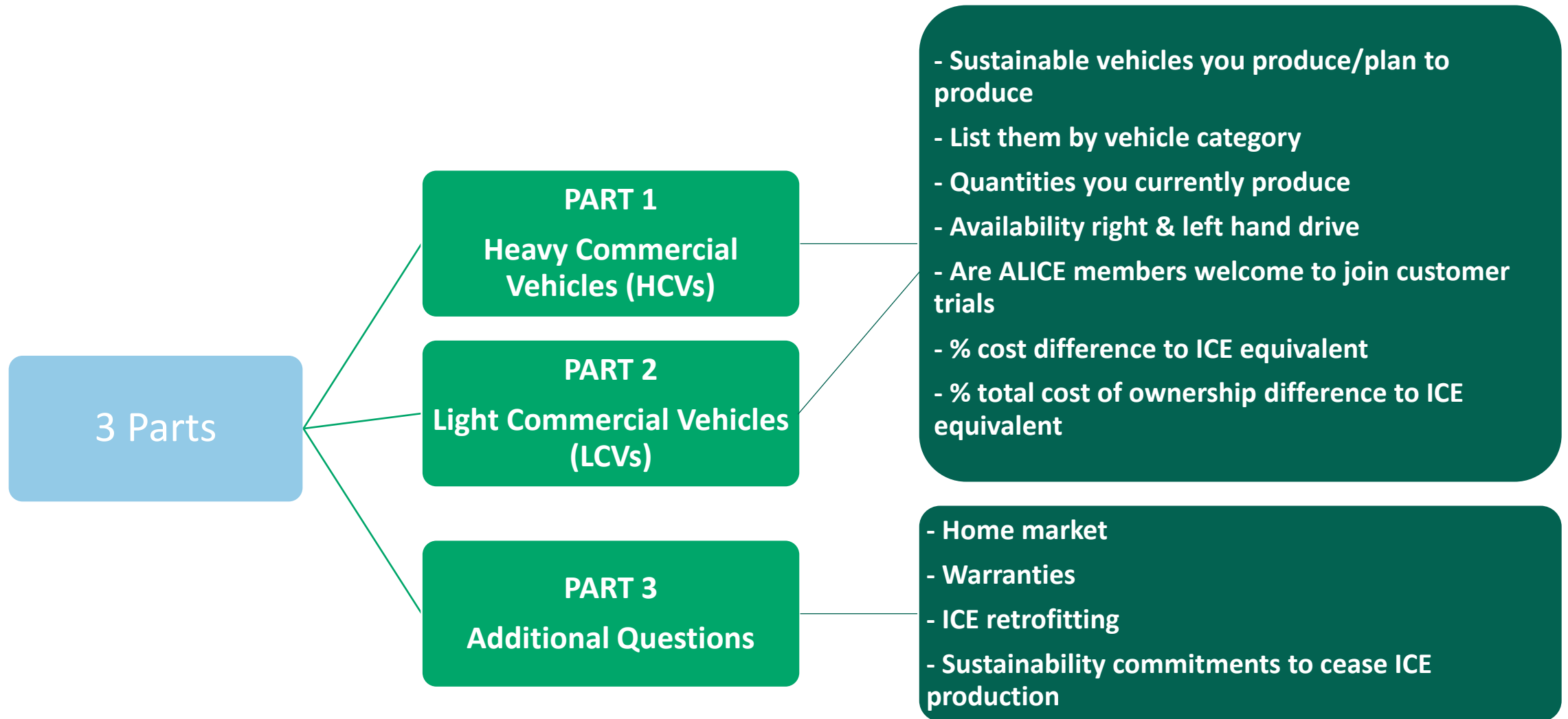


Develop a roadmap, which identified the feasible options for zero emission & sustainable commercial vehicles for ALICE members



Identify timelines for availability of zero emission & sustainable commercial vehicles

# Survey Questions



# Survey Responses

- Survey was sent to 32 OEMs
- Received 5 survey responses
- Received other responses from OEM's stating that they do not operate HCVs/LCVs or OEM had not completed operations for their European market.

*Survey sections completed by OEMs*

	Part 1 (HCVs)	Part 2 (LCVs)	Part 3 (Additional Qs)
OEM 1	✓	✓	✓
OEM 2	✓	✓	✓
OEM 3	✓	X	✓
OEM 4	✓	X	✓
OEM 5	✓	X	✓

# Survey Responses - Part 1 (HCVs)

- Answered by all of the respondents
- 14 vehicles listed – 10 BEV, 1 FCEV And 3 unknown
- None of the vehicles listed are in serial production
- Trials & appraisals will be available from 2023 to 2026

Vehicle type	Range	Vehicle production	% cost difference to ICE equivalents.
7.5 tonne BEV rigid truck	Not provided	2026	250%-300% more
16 tonne BEV rigid truck	150-200 km	2023	250%-300% more
18 tonne BEV rigid truck	150-200 km	2023	250%-300% more
18 tonne BEV rigid truck	250 km	Not provided	100% more
26 tonne BEV rigid truck	TBC	Not provided	250%-300% more
12 tonne BEV rigid truck	TBC	Not provided	250% to 300% more
18 tonne BEV rigid truck	150-350 km	Not provided	250% add on
Rigid tractor BEV (40 tonne)	>350 km	Not provided	250% add on
18 BEV tonne tractor and cab chassis	250km	Not provided	100% add on
44 BEV tonne tractor and cab chassis	350km	Not provided	100% add on
44 FCEV tonne tractor and cab chassis	700 km	Not provided	300% add on
W4 CC Class 4 cab chassis	150 miles	Not provided	Not available
W750 class 4 steep van	150 miles	Not provided	Not available
Vehicle Class 5&6	Up to 150 miles	Not provided	Not available

# Survey Responses – Part 2 (LCVs)

Answered by 2 of the 5 respondents

5 vehicles listed – 2 BEVs and 3 FCEVs

% cost difference compared to ICE equivalent was provided for 4 vehicles

Trials and appraisals available at the end of 2024

All of the vehicles listed will be in production by the end of 2025

## Survey Responses - Part 2 (LCVs)

Vehicle type	Range	Vehicle production	% cost difference to ICE equivalent	% total cost of ownership difference to ICE equivalent
<b>QLI BEV 3.5-7.2 tonnes</b>	Up to 250km range	2024	50% add on	Lower than the combusting vehicle in Germany
<b>QLI FCEV. 4.2 tonnes</b>	450km range	2024	300% add on	40% add on
<b>QLI FCEV 5.0 tonnes</b>	450km range	2024	300% add on	40% add on
<b>Qargo 4 EV BEV 4.25 tonnes</b>	Not given	2024	Equal to combusting vehicle of that size	Lower than the combusting vehicle in Germany
<b>FCEV vans 3.5-7.5 tonnes</b>	Not given	2025	Not given	Dependent on hydrogen price and operating conditions.

# Survey Responses - Part 3 (Additional Questions)

- Answered by all 5 respondents, with nothing left blank.
- Very useful!
- Table below indicates sample questions that were asked and answered - cannot give detail as it may threaten the anonymity of the respondents

<b>What territories/markets do you operate in?</b>
<b>Do you envisage extending your territories/markets to other countries?</b>
<b>What are the warranties on the sustainable commercial vehicles listed?</b>
<b>Do these warranties apply to the HOME MARKET or ALL MARKETS?</b> <b>If ALL MARKETS, are there any differences in the warranties offered, if yes, can you list them.</b>
<b>Will servicing be available to the HOME MARKET or ALL MARKETS?</b> <b>If ALL MARKETS, are there any differences in the servicing offered, if yes, can you list them.</b>
<b>Do you offer any sustainable vehicle initiatives for current ICE fleets?</b> <b>E.g. retrofitting for different fuel types, reconditioning, etc.</b>
<b>Do you offer retrofitting for hydrogen?</b> <b>YES/NO, If YES, can you detail the criteria and who can avail of this.</b>
<b>Do your sustainability commitments require you to cease production of ICE commercial vehicles? YES/NO, If YES, what is your commitment?</b>



## Next Steps



Keep the activity open

Invite the OEMs to  
present

Review infrastructure  
at a later date

# Thank you!

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