## Cars

- Global mass market for battery electric vehicles already exists today
- Change in mobility culture (multimodality, sharing, autonomous vehicles, etc.)
  - → Range tends to decline in importance

## Local/regional freight transport

- · High cost pressure
- · Limited action radius
- Predictability tends to be high
- Requirements regarding air quality and noise emissions in urban areas
- Limited supply of alternative drive technologies to date

## Long-distance freight transport

- High cost pressure
- Large driving distances
- Heterogeneous usage profiles
- Traffic concentrated on comparatively few routes
- Alternative drives only available thus far as prototypes or in small series







Efficient echnology mix in 2030

Focus: Battery electric vehicles (Niche technologies: fuel cells, synthetic fuels)

Focus: Battery electric vehicles

ERS hybrid systems, fuels cells and battery