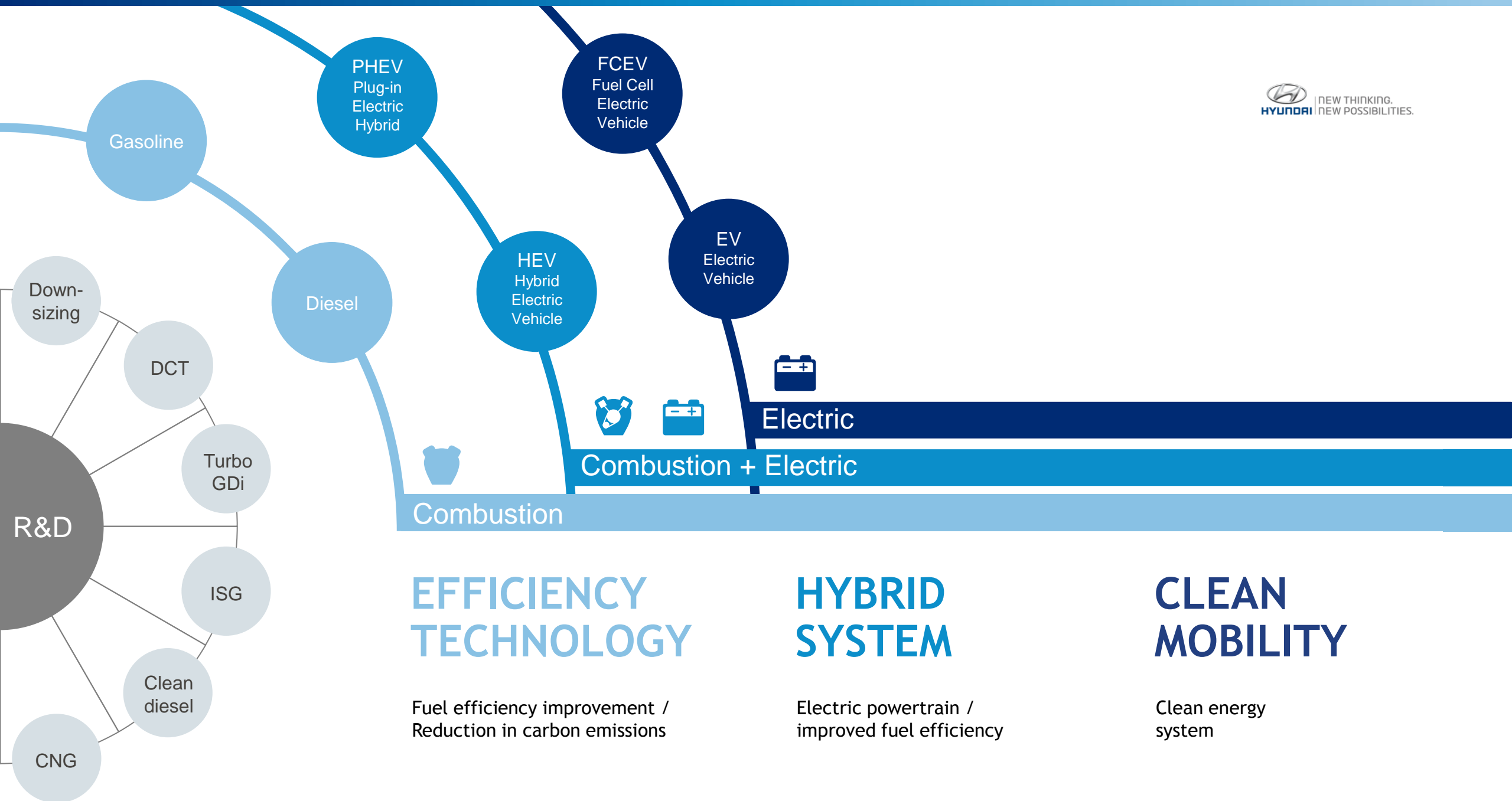


Fuel Cell

Frank Meijer - Head of Fuel Cell Electric Vehicle | Hyundai Motor Europe



Insights from the first Manufacturer in commercial deployment





blue  **drive**

Hyundai's Global Approach

 **North America**
California

 **Asia**
South-Korea

 **Europe**
Multi country



Is history repeating itself?



Carbon
dioxide
(CO₂)



Alternative
for the horse



Refuelling
infrastructure

A true European player

EU sales

90%

Factory
Investment

€2,2^{billio}

Created jobs

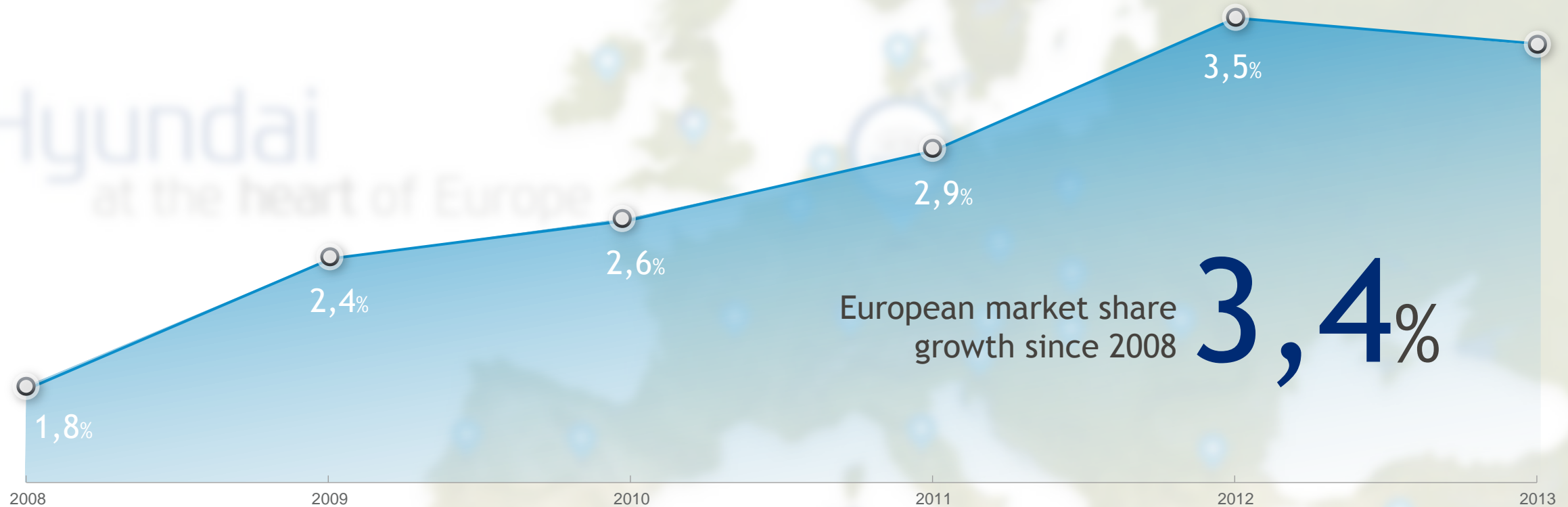
152k

A true European player



A true European player

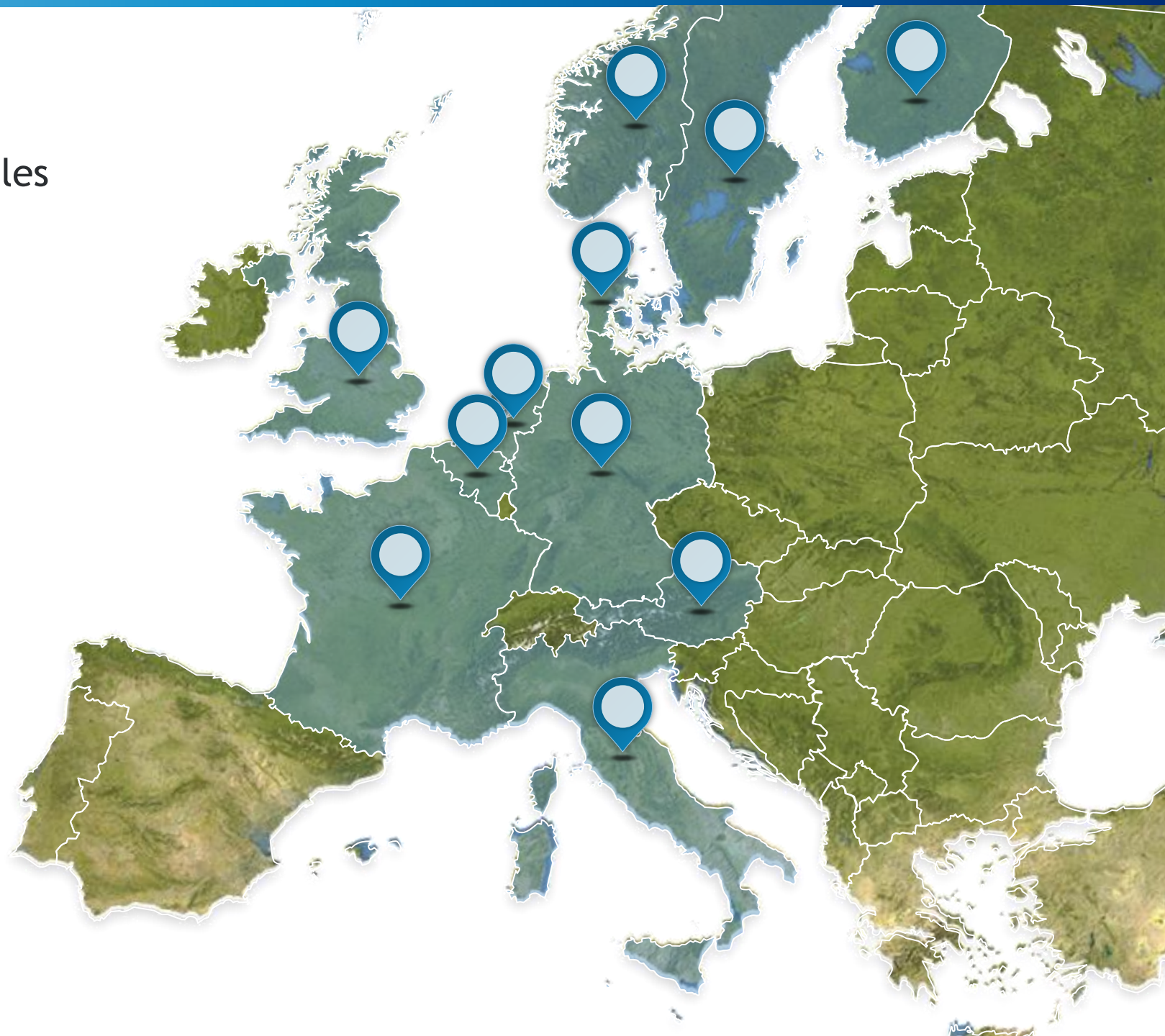
Hyundai
at the heart of Europe



Deployment of Fuel Cell vehicles

- | | |
|--|---|
|  Italy |  Austria |
|  Netherlands |  Belgium |
|  Norway |  Denmark |
|  Sweden |  France |
|  United Kingdom |  Finland |
| |  Germany |

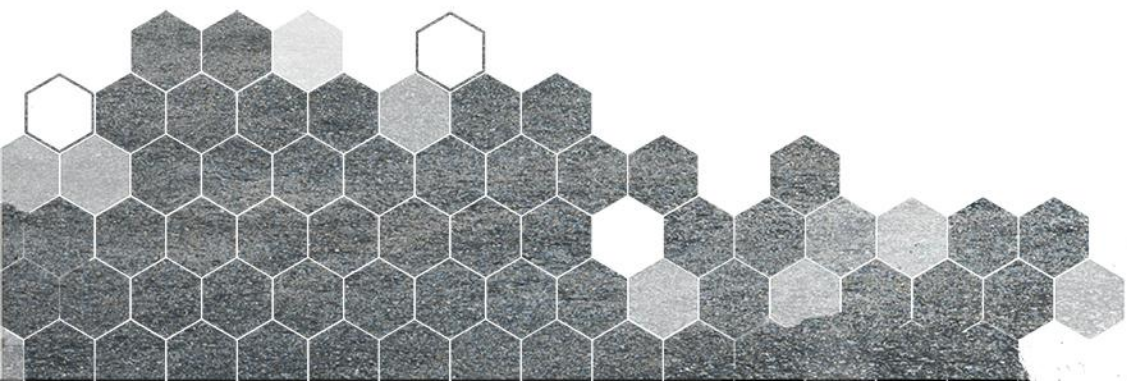
11 Countries
in Europe



- 
- A world map showing the locations of 15 countries. The map is a stylized, topographical representation with green landmasses and blue oceans. Fifteen blue location pins are placed on the map, indicating the locations of the countries listed in the legend. The pins are located in North America (two), Europe (two), Asia (two), and Australia (one). The legend is located on the left side of the map, listing 15 countries with their respective flags and names.
- | | |
|--|--|
|  Italy |  Austria |
|  Netherlands |  Belgium |
|  Norway |  Denmark |
|  Sweden |  France |
|  United Kingdom |  Finland |
| |  Germany |
|  Canada |  South Korea |
|  USA |  Australia |

15 Countries
Worldwide

Fuel Cell development



ix35 Fuel Cell

Hyundai's journey to leadership



World's
first FCEV

mass production
starts operation
in 2013

2013



ix35 Fuel Cell production







Challenges





#1 Challenge REFUELLING INFRASTRUCTURE



2014

29

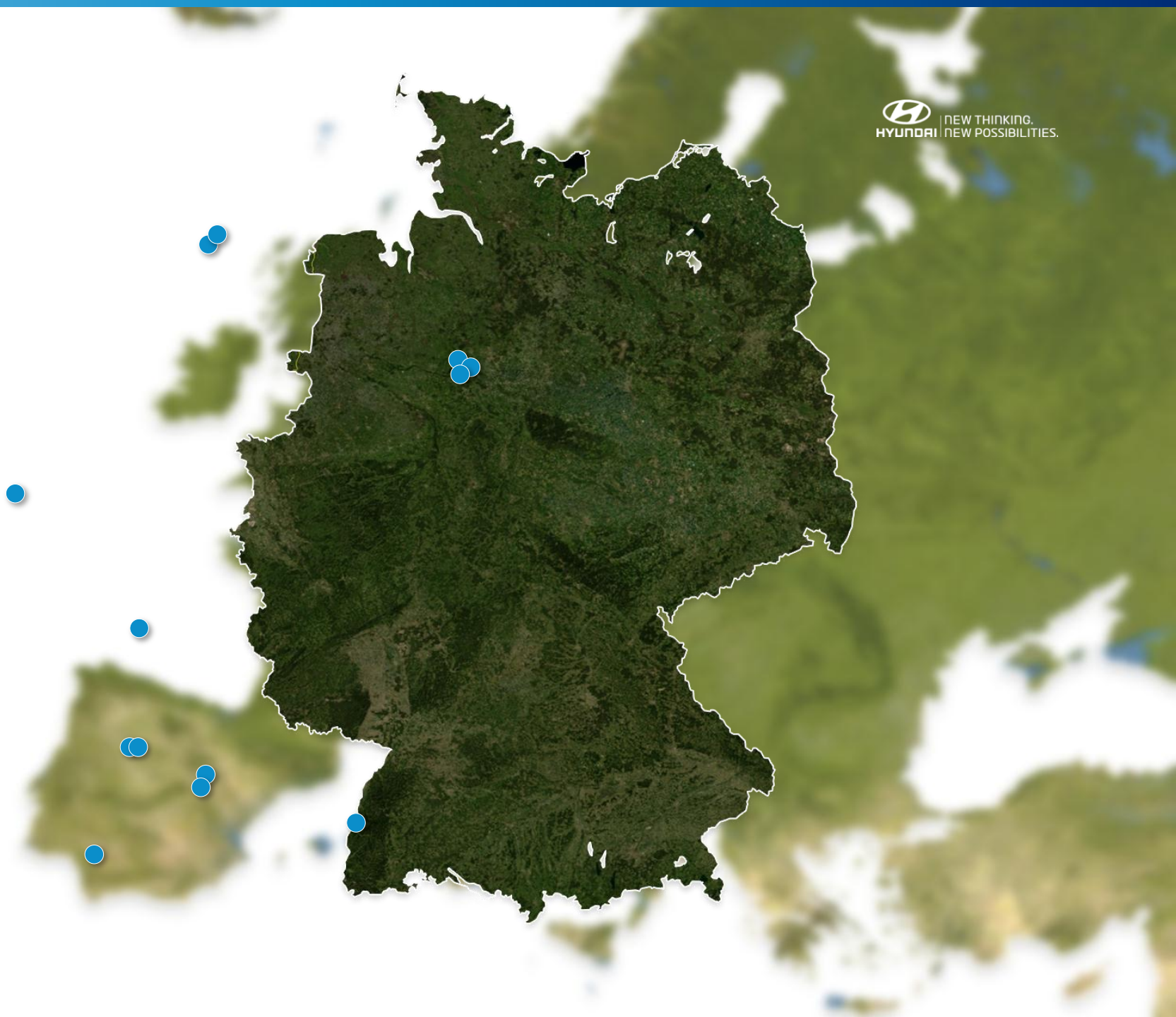
refuelling
stations across
Europe



2014

13

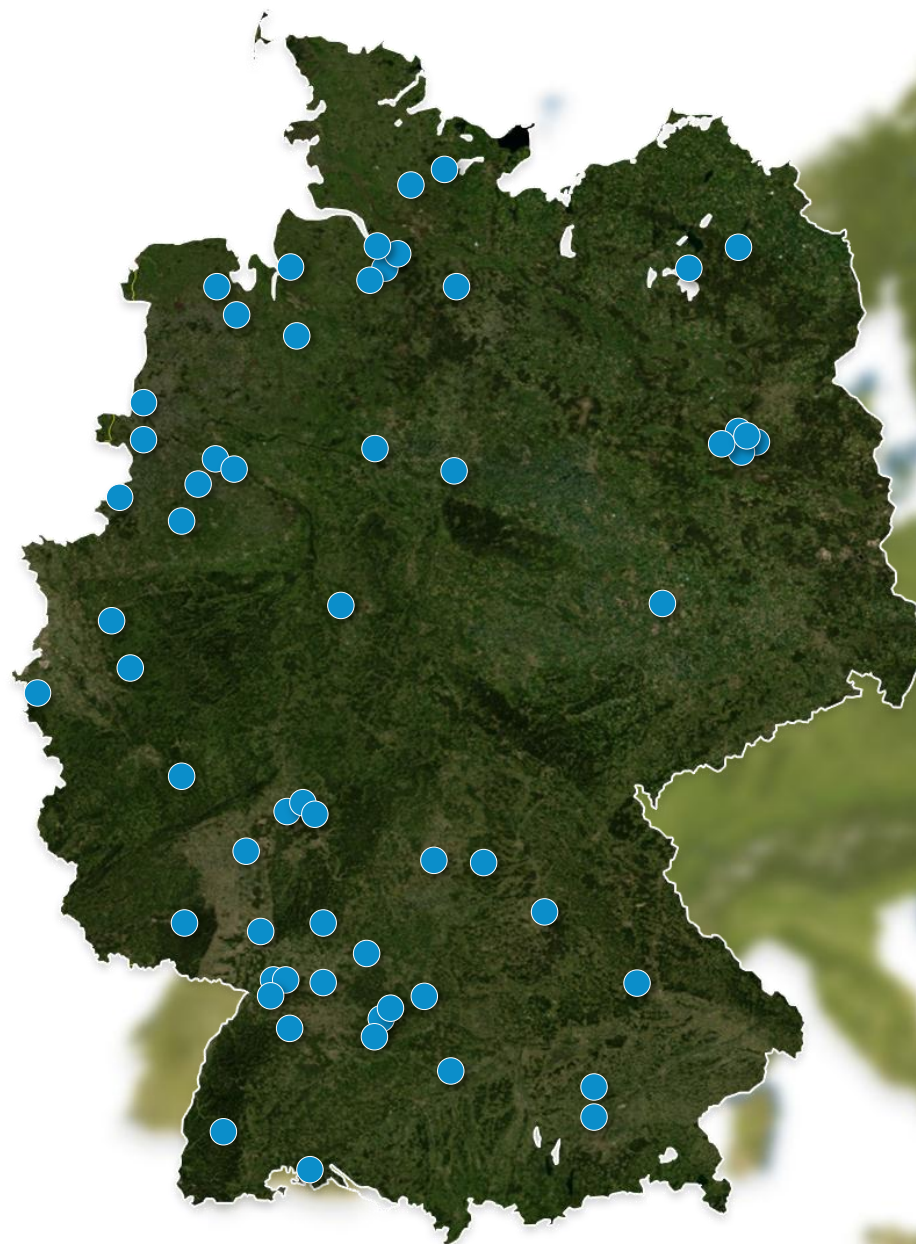
refuelling
stations in
Germany



2015

50

refuelling
stations in
Germany





#2 Challenge BUILDING AWARENESS





FUEL CELLS AND HYDROGEN
JOINT UNDERTAKING



fuel cells & hydrogen for sustainability

hyFIVE
HYDROGEN FOR INNOVATIVE VEHICLES



110
Fuel Cells vehicles
75
ix35 Fuel Cell



35
Other

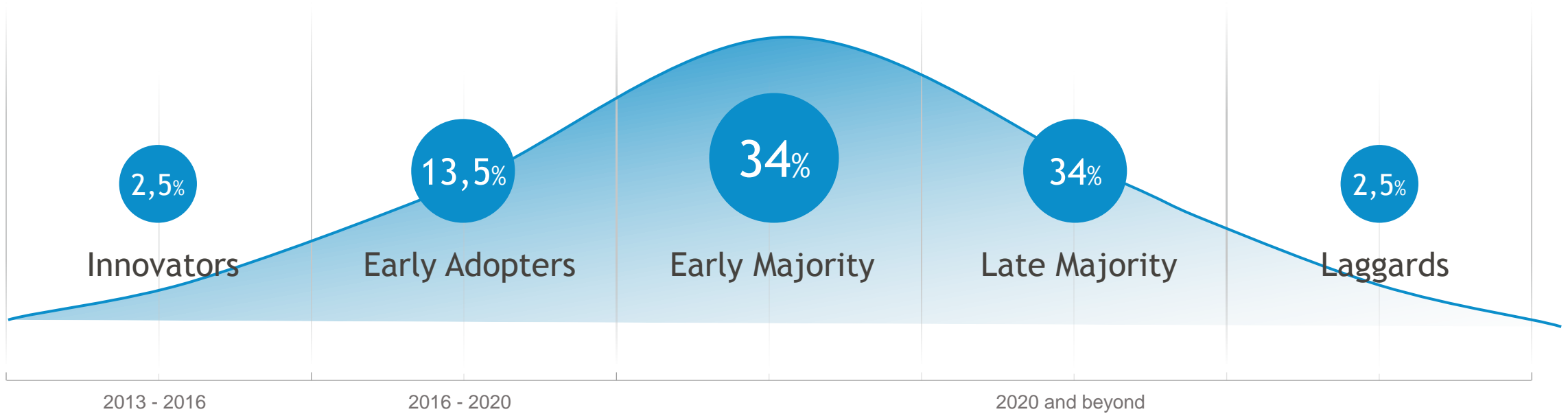
hyFIVE
HYDROGEN FOR INNOVATIVE VEHICLES

#3 Challenge

TARGET CUSTOMERS



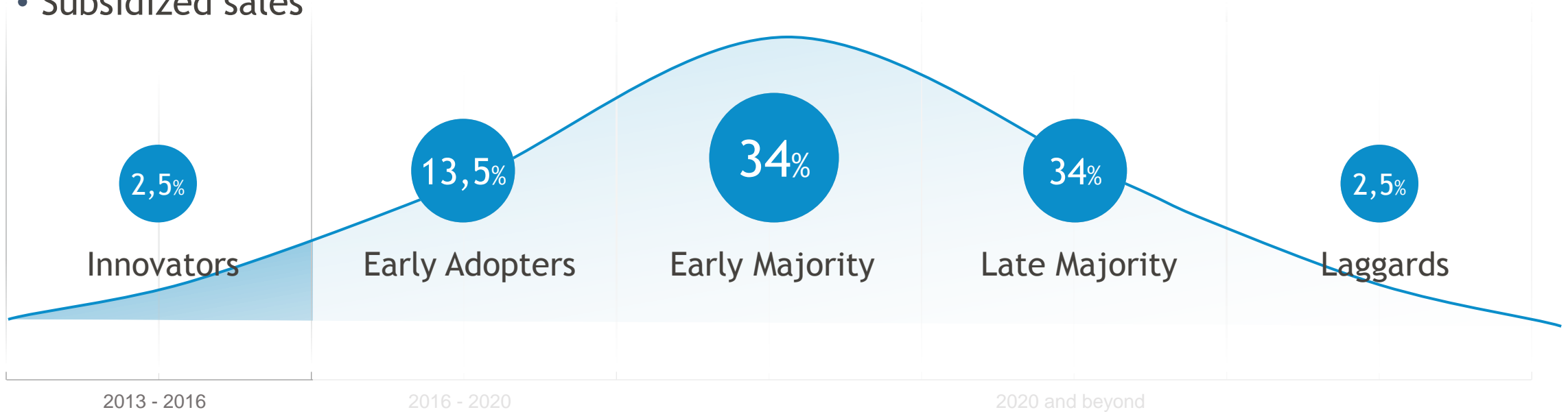
Target Customers



Target Customers

2013 - 2016

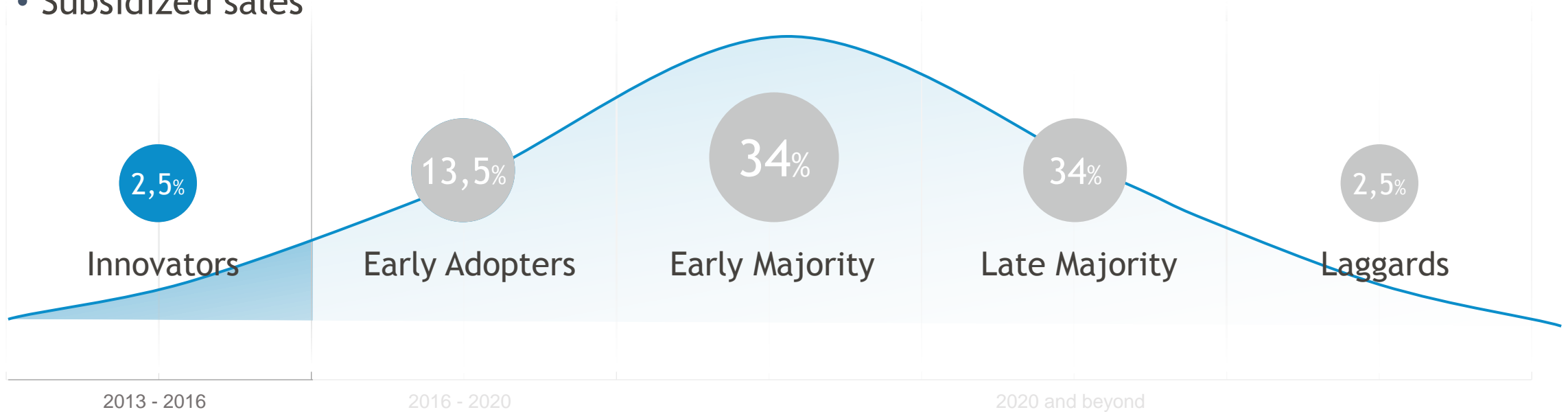
- Companies with an interest in hydrogen
(e.g. production or supply)
- Governments
- Subsidized sales



Target Customers

2013 - 2016

- Companies with an interest in hydrogen (e.g. production or supply)
- Governments
- Subsidized sales
- Corporate Companies



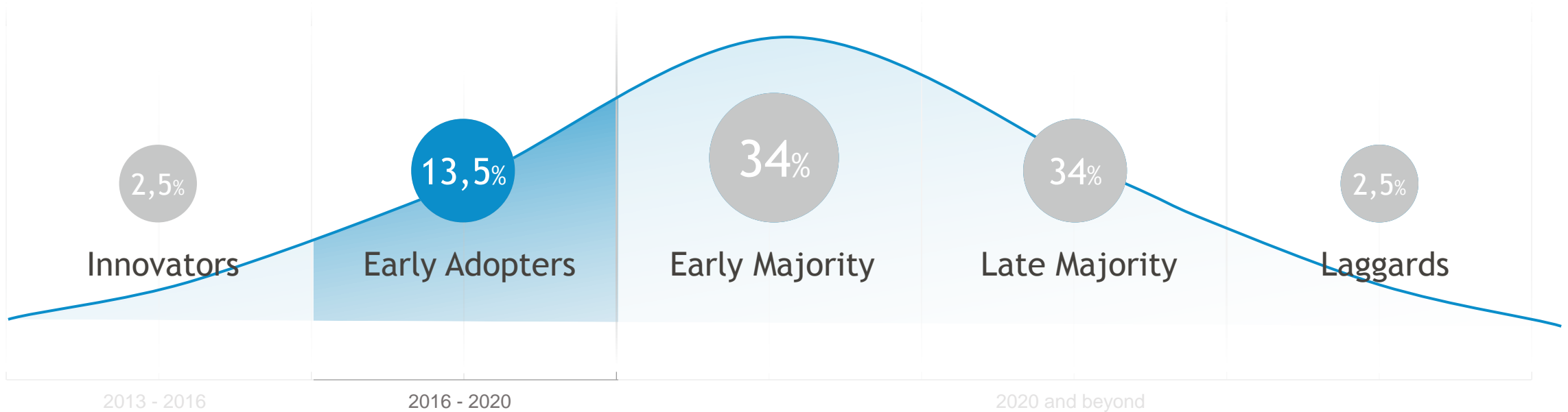
Target Customers

2016 - 2020

- Governments
- Subsidised sales
- Corporate Companies

2020 and beyond

- General competitor for ICE/EV/PHEV
- SME
- Private

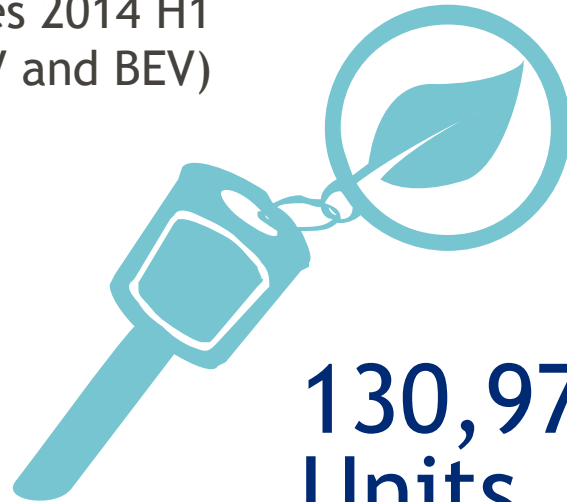


Eco-Friendly Vehicles

Sales Figures 1st half year 2014 Europe



Total Eco Friendly Car Sales 2014 H1
(including Hybrid, PHEV and BEV)



130,977
Units

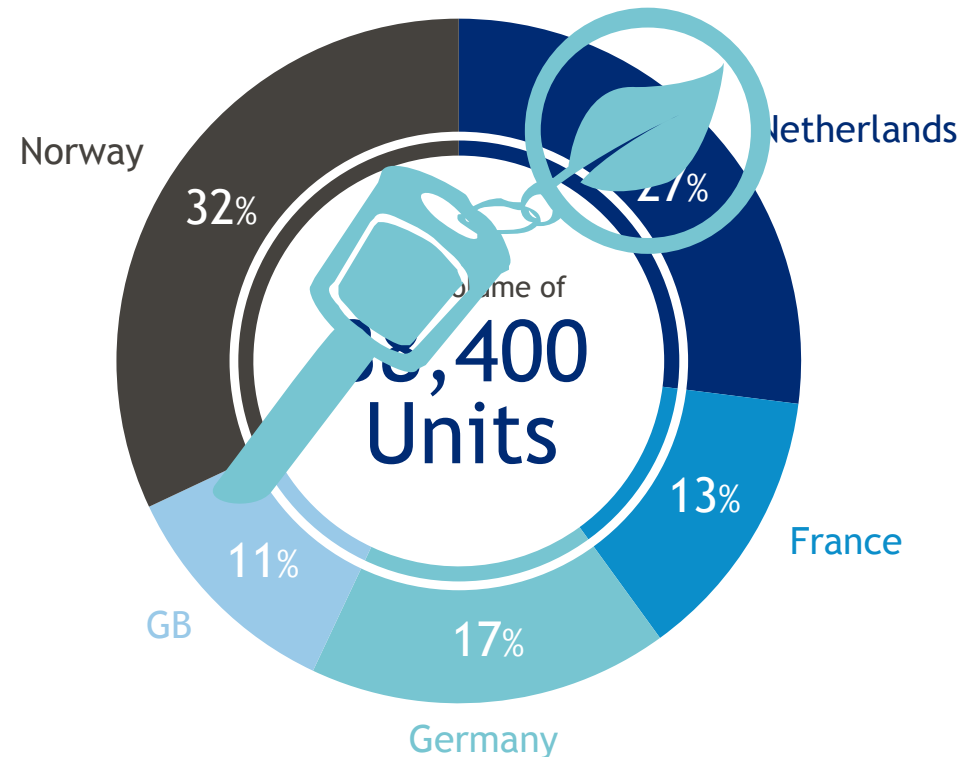
Source: JATO Analytics

Eco-Friendly Vehicles

Sales Figures 1st half year 2014 Europe



BEV & PHEV Markets



Source: JATO Analytics

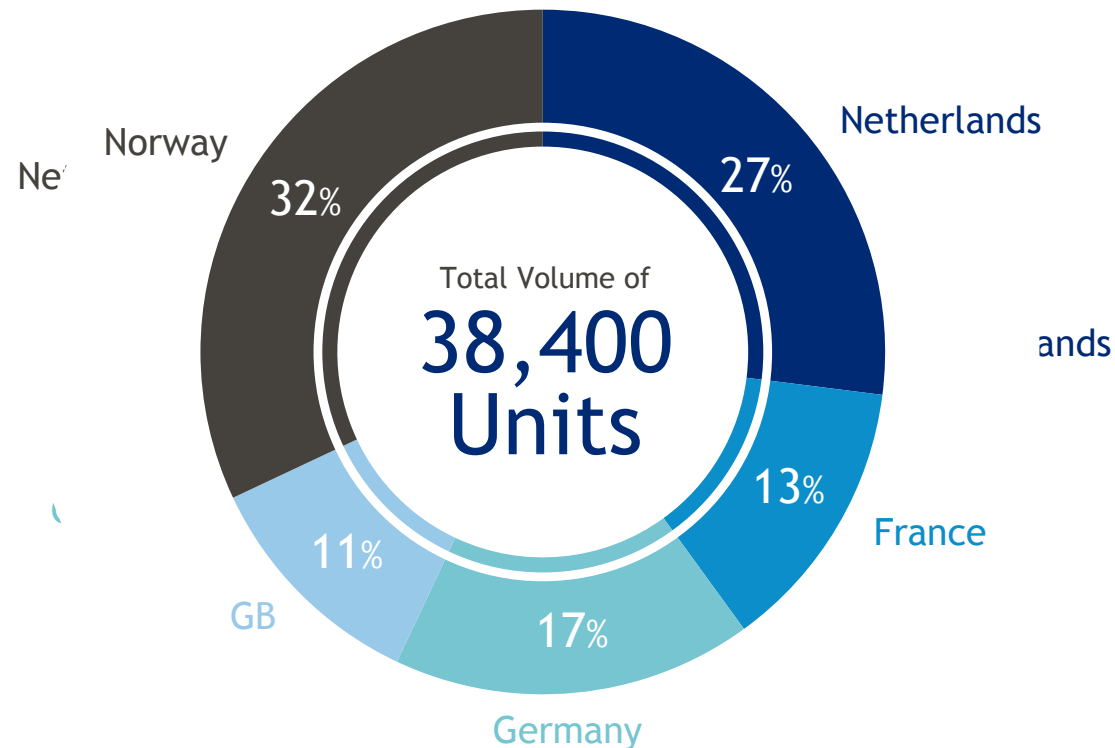
Eco-Friendly Vehicles

Sales Figures 1st half year 2014 Europe



Market PHEV

Market BEV



Source: JATO Analytics

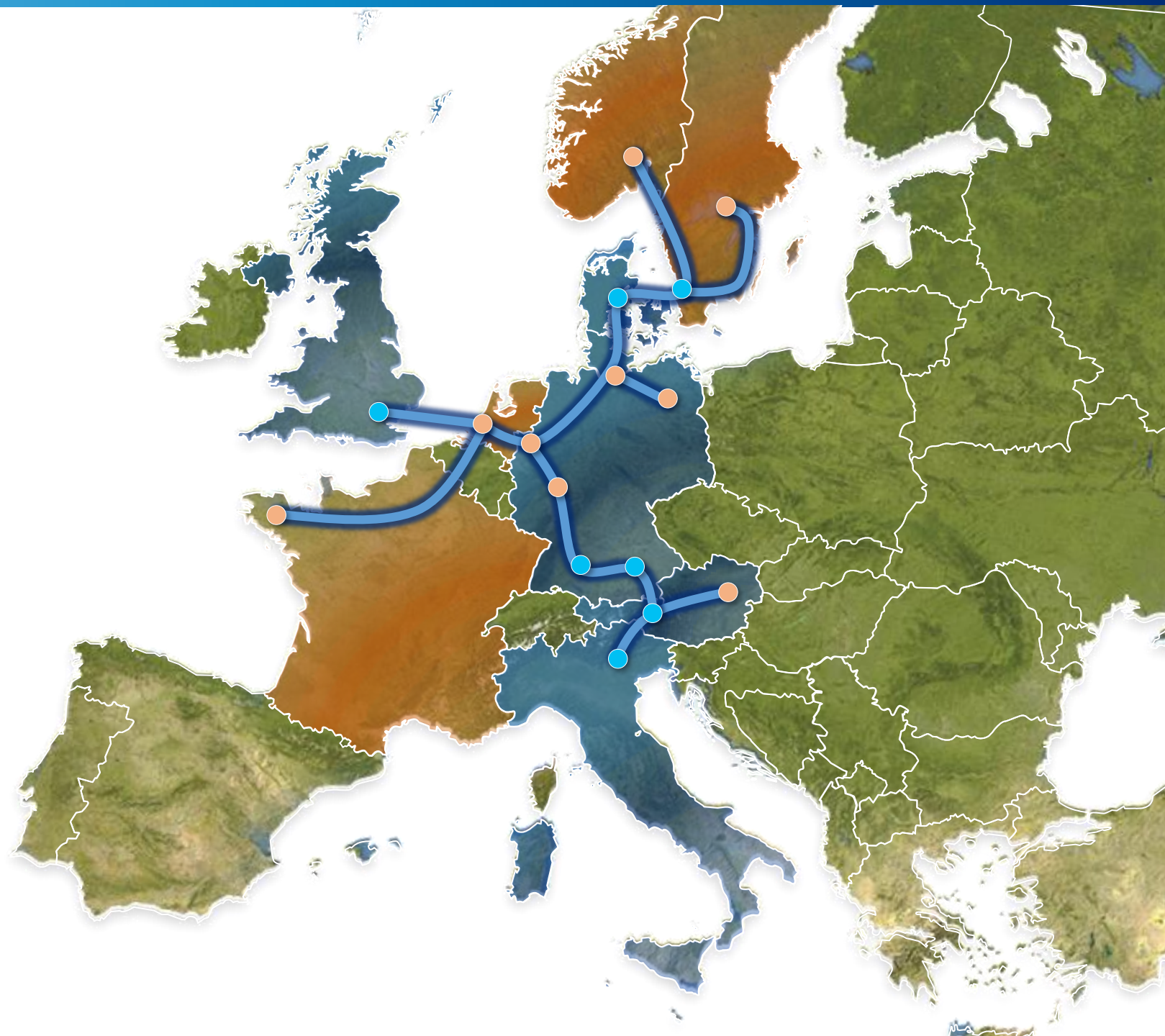
Demand of Fuel Cell vehicles

HyFive

-  Austria
-  Denmark
-  Germany
-  Italy
-  United Kingdom

Actual demand

-  France
-  Netherlands
-  Norway
-  Sweden



Conclusion





Thank you

