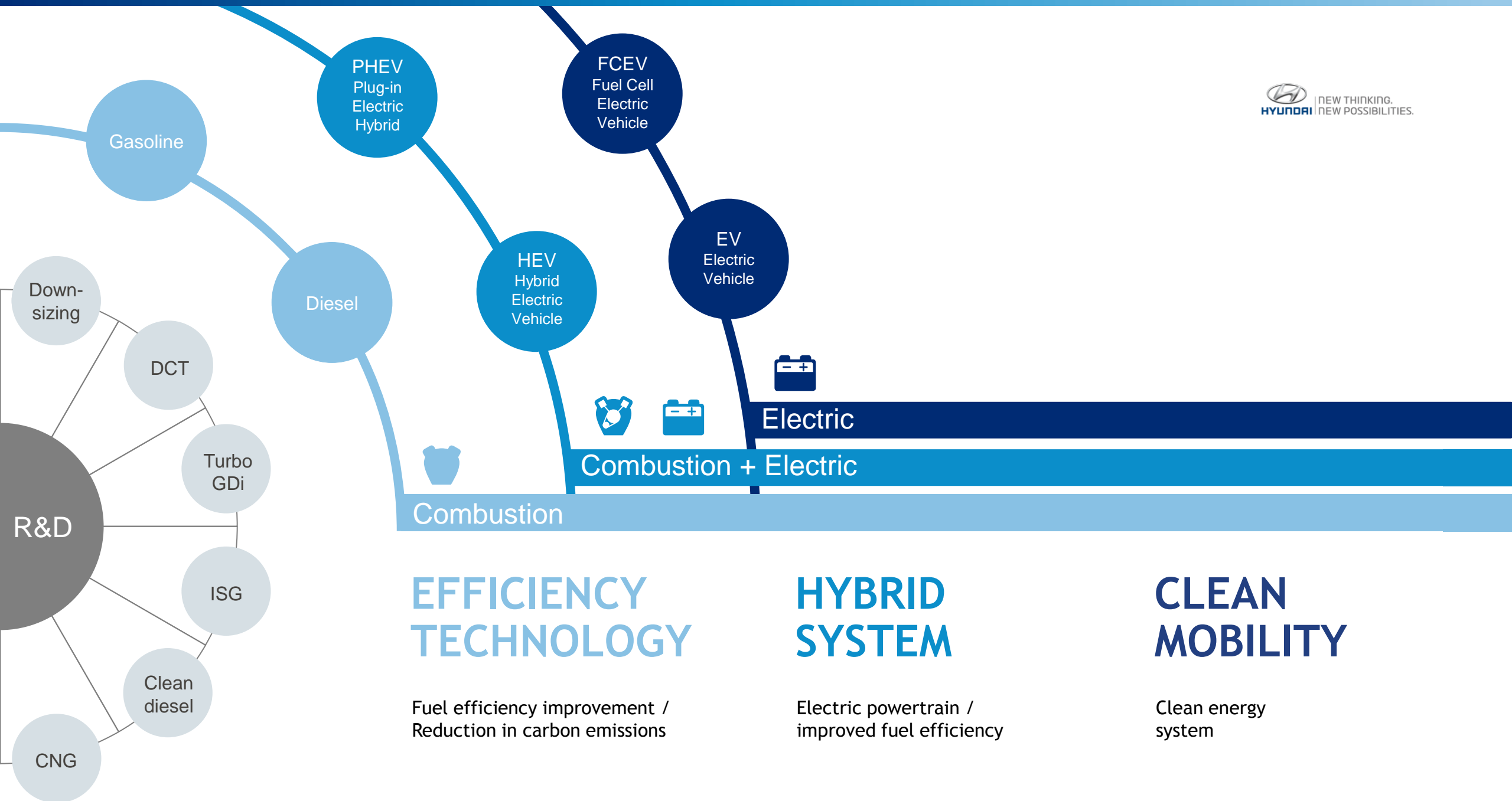


Fuel Cell

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}

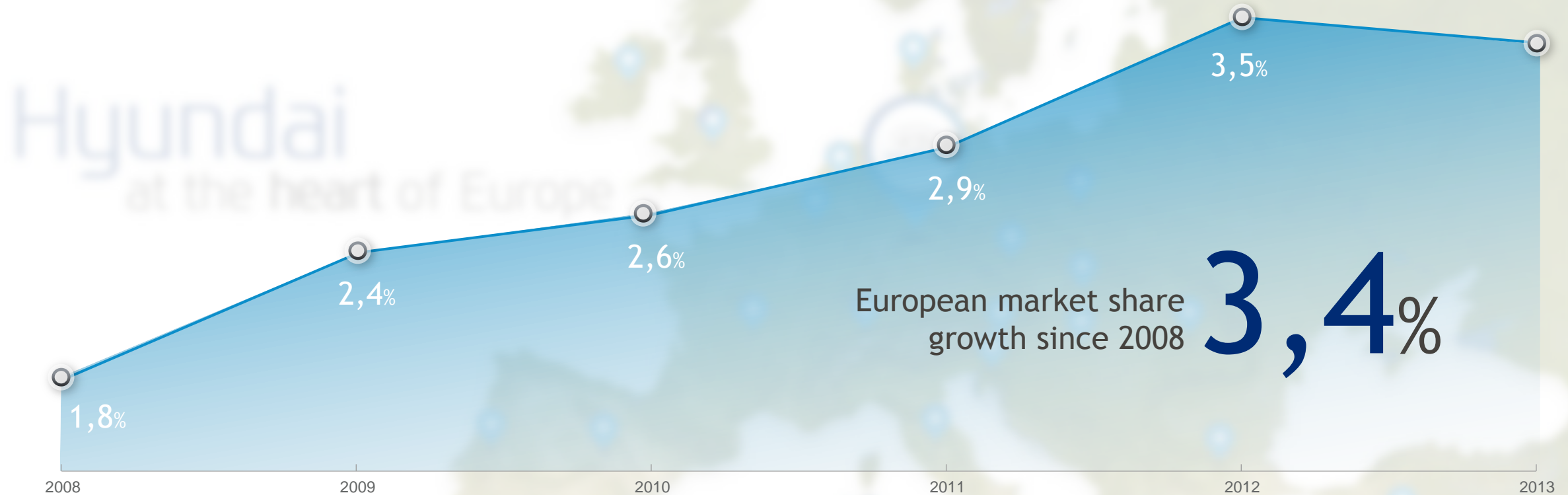
Created jobs

152k

A true European player



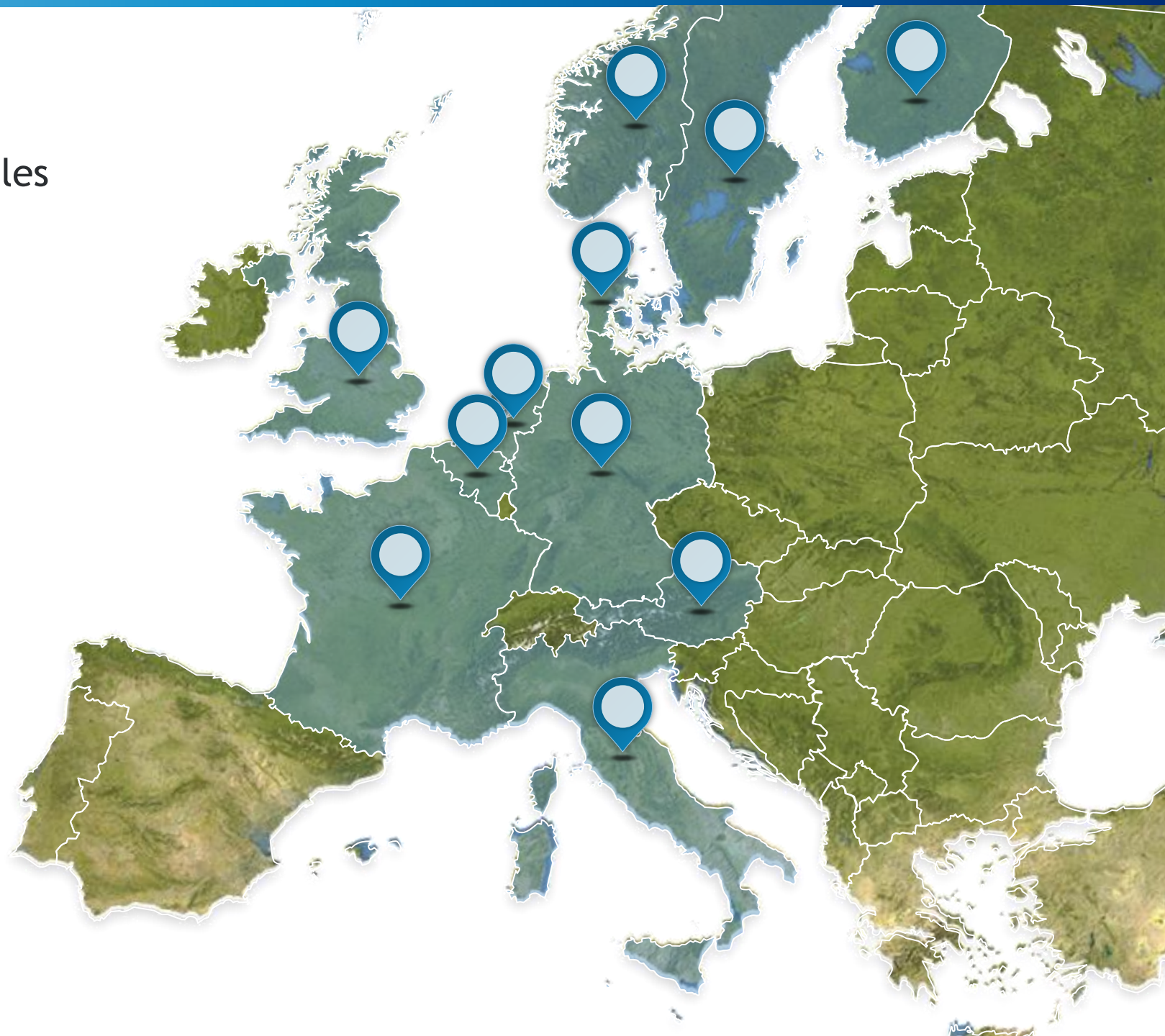
A true European player



Deployment of Fuel Cell vehicles

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

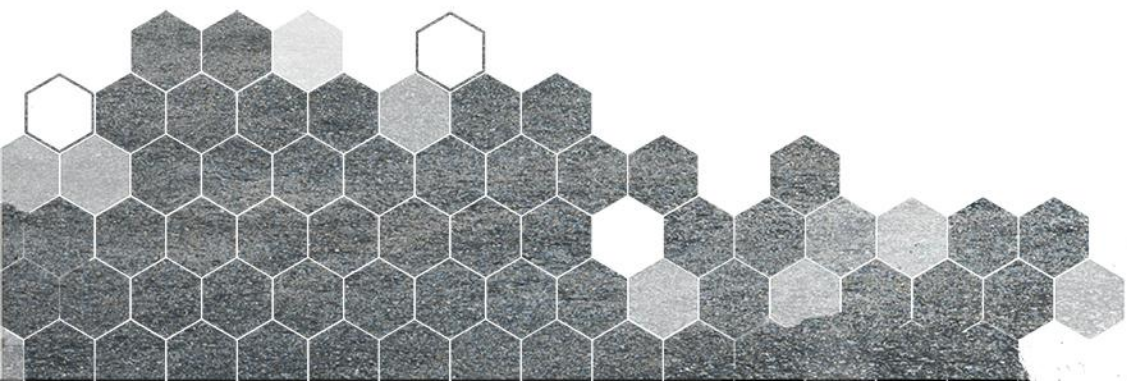
11 Countries
in Europe



- 
- | | |
|--|---|
|  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

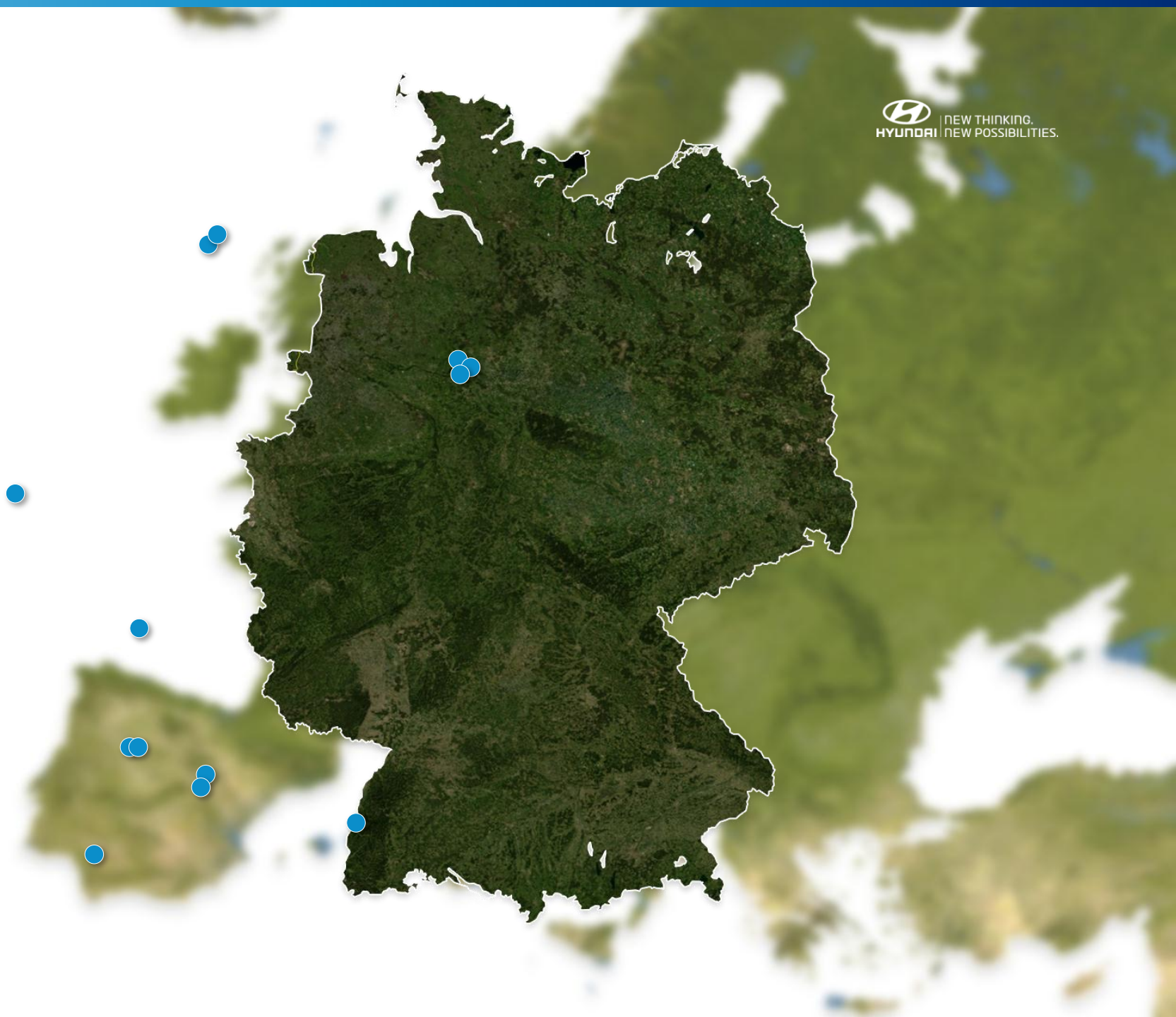
refuelling
stations across
Europe



2014

13

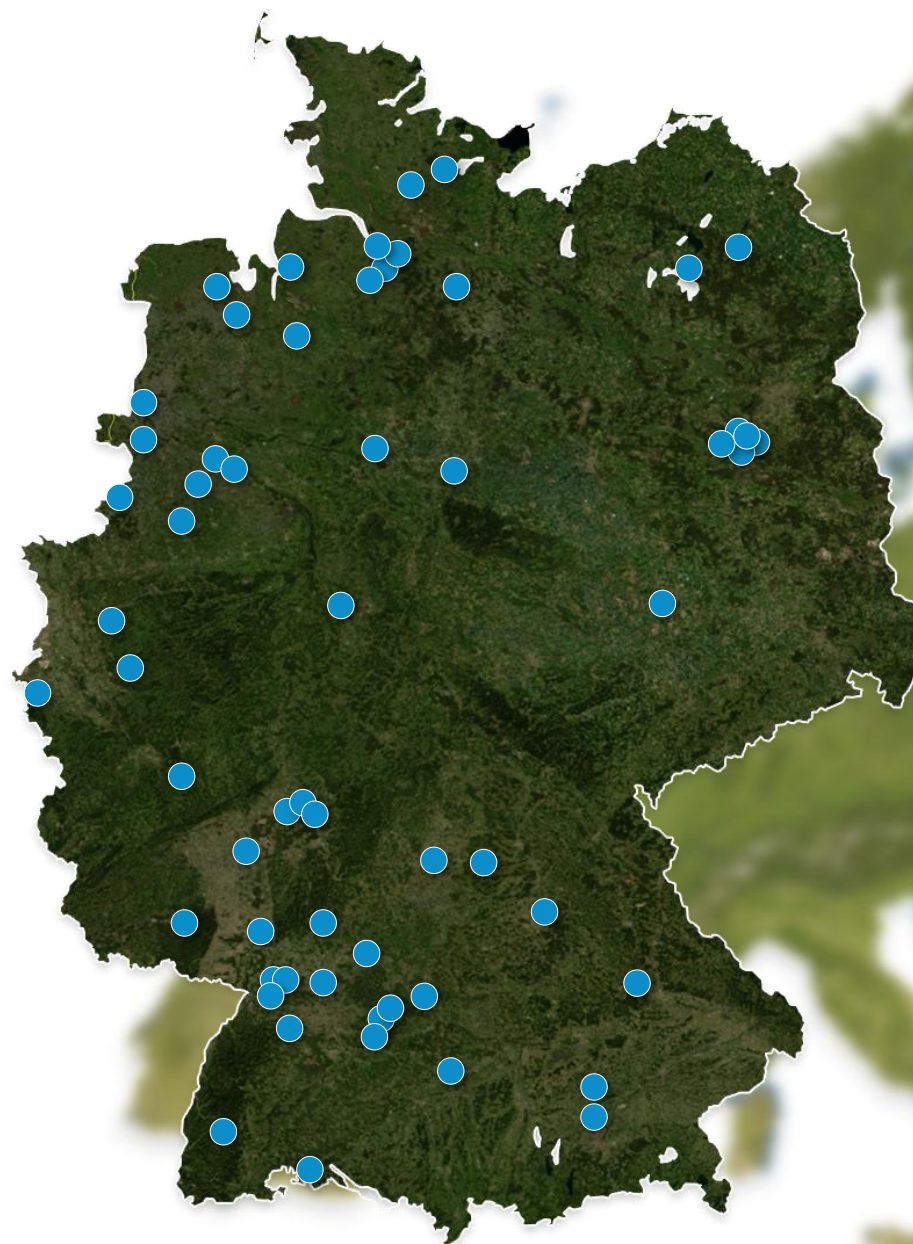
refuelling
stations in
Germany



2015

50

refuelling
stations in
Germany





#2 Challenge BUILDING AWARENESS





FUEL CELLS AND HYDROGEN
JOINT UNDERTAKING



hyFIVE
HYDROGEN FOR INNOVATIVE VEHICLES



110
Fuel Cells vehicles
75
ix35 Fuel Cell



35
Other

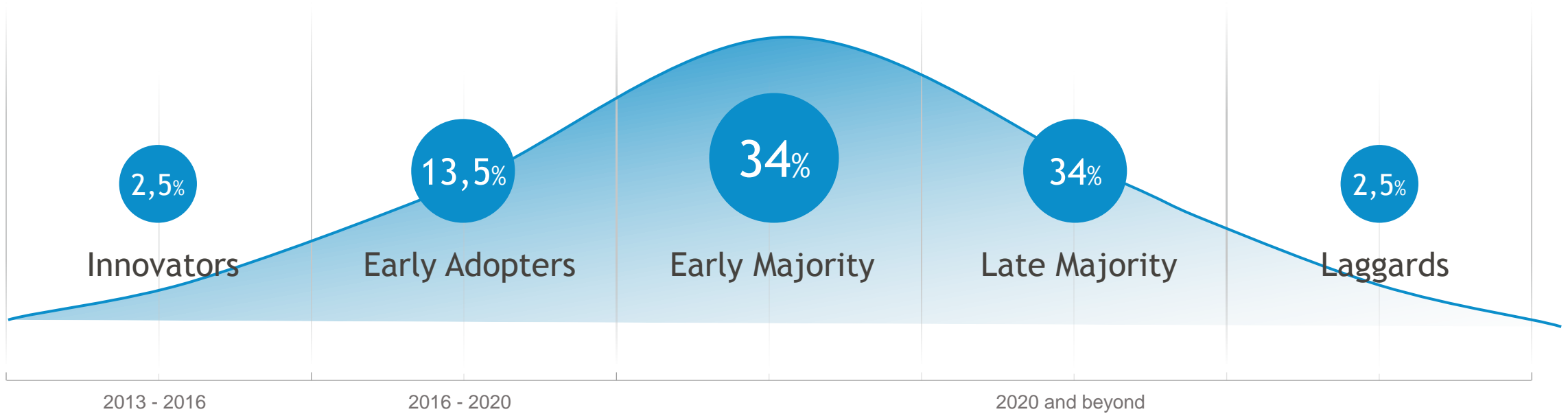
hyFIVE
HYDROGEN FOR INNOVATIVE VEHICLES

#3 Challenge

TARGET CUSTOMERS



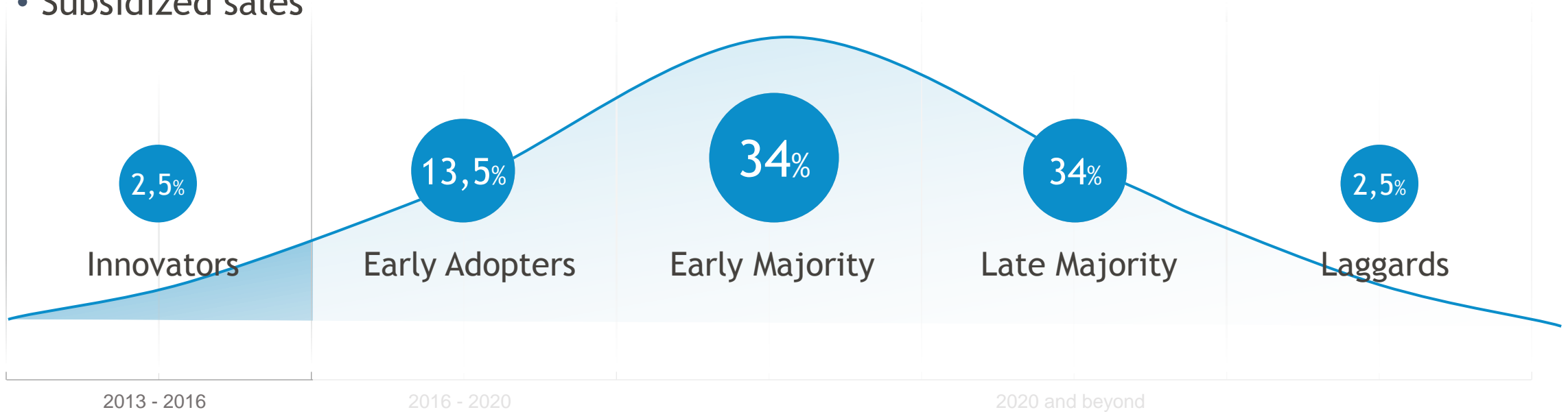
Target Customers



Target Customers

2013 - 2016

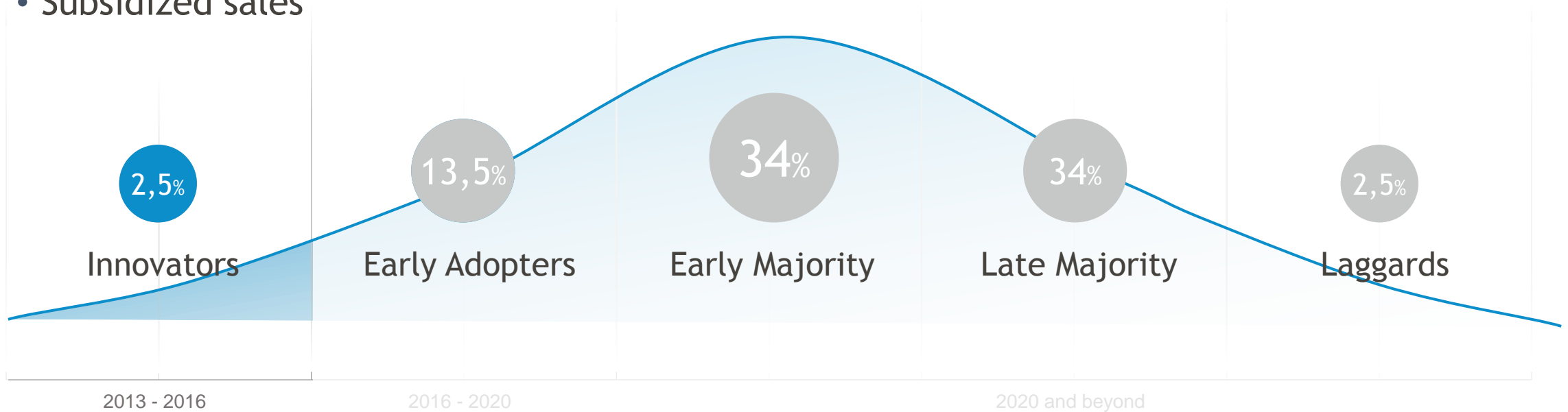
- Companies with an interest in hydrogen (e.g. production or supply)
- Governments
- Subsidized sales



Target Customers

2013 - 2016

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



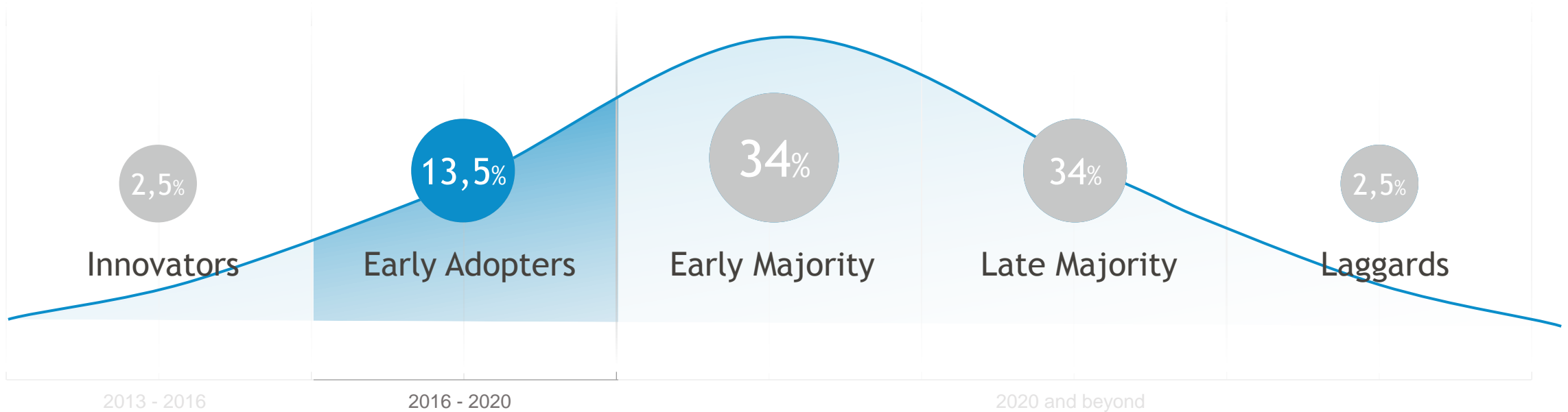
Target Customers

2016 - 2020

- Governments
- Subsidised sales
- Corporate Companies

2020 and beyond

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

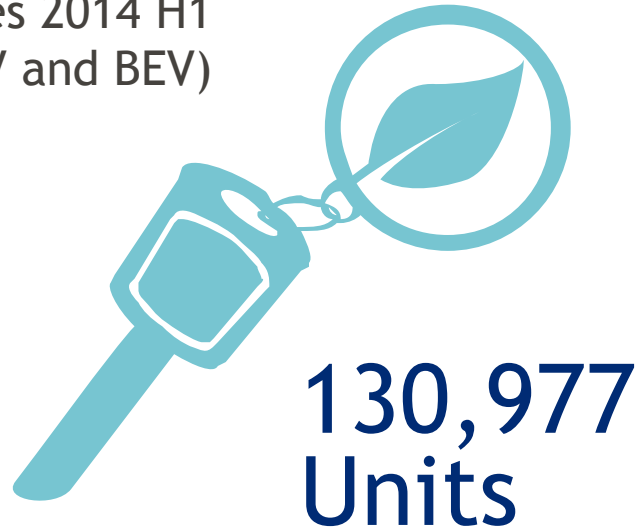


Eco-Friendly Vehicles

Sales Figures 1st half year 2014 Europe



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

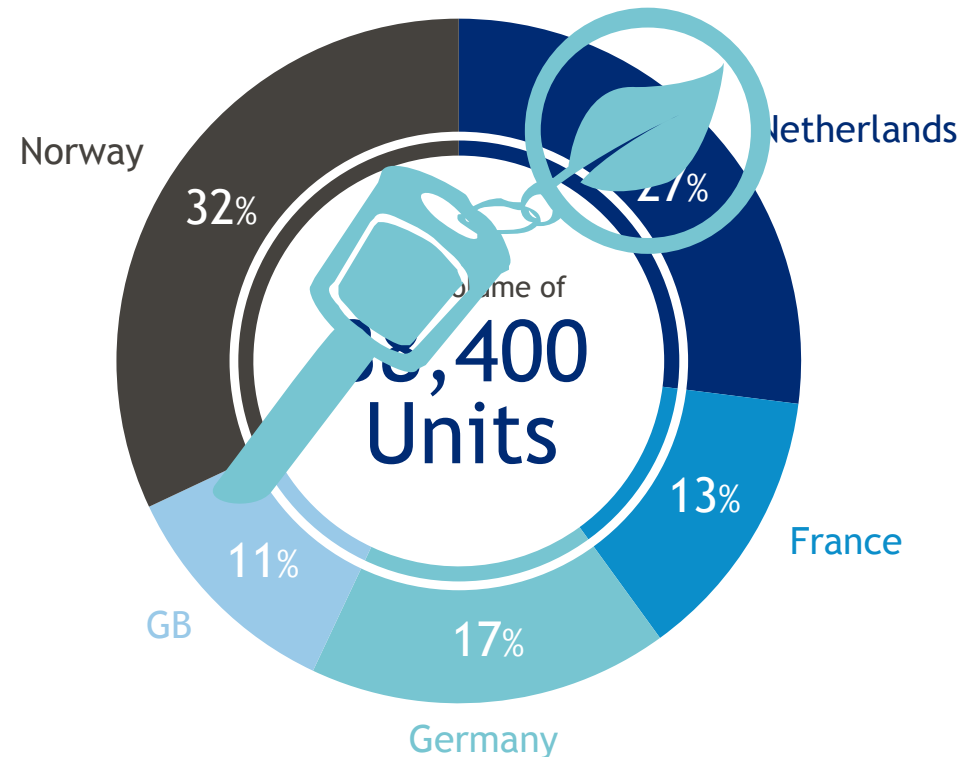


Eco-Friendly Vehicles

Sales Figures 1st half year 2014 Europe



BEV & PHEV Markets



Source: JATO Analytics

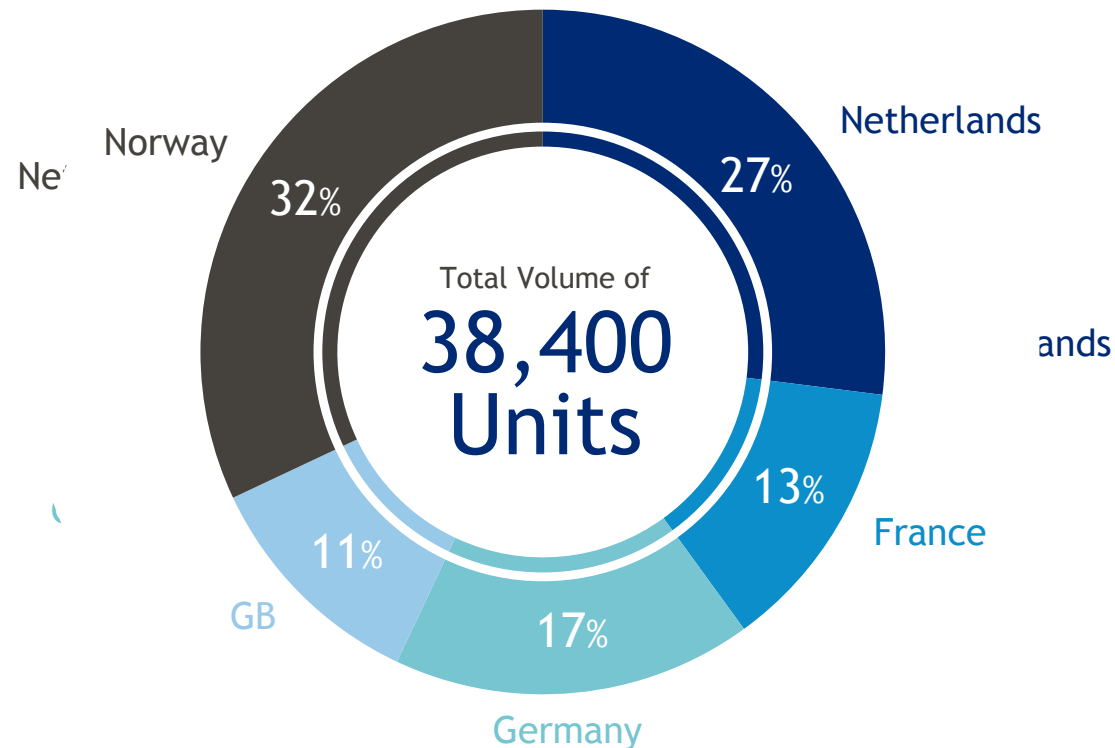
Eco-Friendly Vehicles

Sales Figures 1st half year 2014 Europe



Market PHEV

Market BEV



Source: JATO Analytics

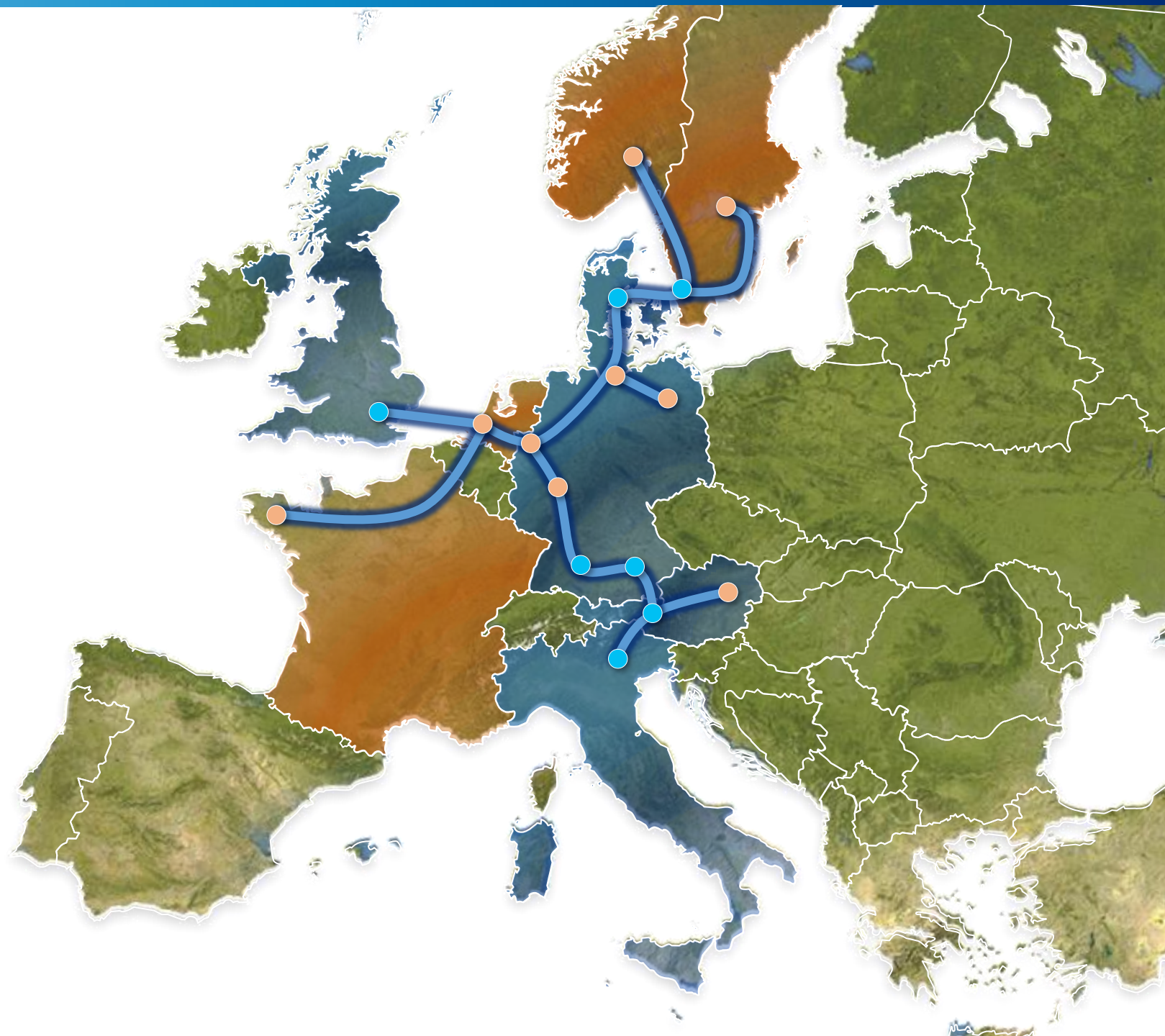
Demand of Fuel Cell vehicles

HyFive

-  Austria
-  Denmark
-  Germany
-  Italy
-  United Kingdom

Actual demand

-  France
-  Netherlands
-  Norway
-  Sweden



Conclusion





Thank you

