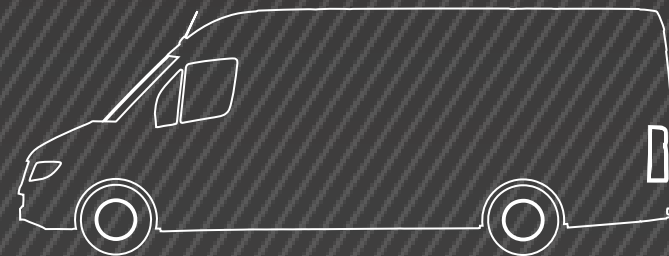
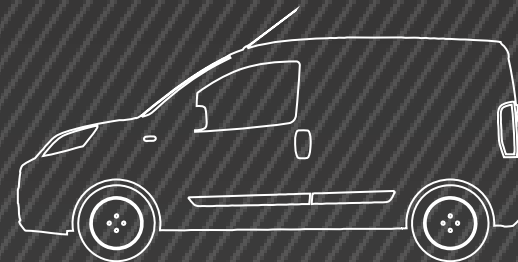
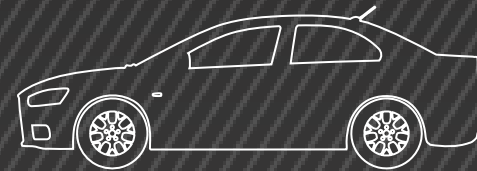


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Open.  
Honest.  
Transparent.



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# Ogilvie Fleet Overview

ESTABLISHED IN

**1979**



NET WORTH  
IN EXCESS OF  
**£22m**



20 AWARDS FOR  
CUSTOMER SERVICE  
AND TECHNOLOGY

FN50 #18  
FLEET SIZE  
**18,500**

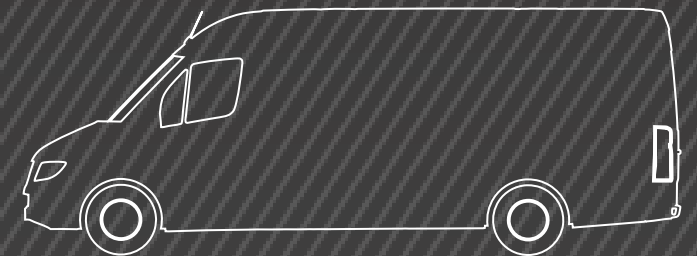
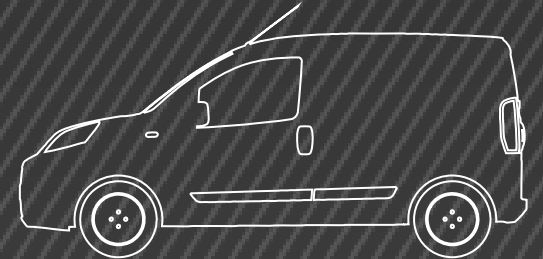
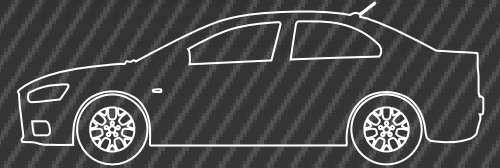
TURNOVER CIRCA

**£129m**



GROWTH  
IN EXCESS OF  
**10%**

# Adoption of Electric & Plug- In Vehicles in UK Fleets



**Jamie Arkell**  
Corporate Partner Manager  
Ogilvie Fleet

**ogilvie**  
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# Agenda

Electric Vehicles & Hybrids

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The Pace of Change

---

Key Benefits to Running EVs

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So Where to Start?

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How to Plan Comprehensively

---

Where to Adapt Your Policy

---

Key Conclusions

---



# The Main Electric Vehicle Variations

1

'Pure' Electric Vehicles  
(BEV)



*e.g. Kia e-Niro, Renault Zoe,  
Tesla Model 3*

2

Plug-In Hybrid Electric  
Vehicles (PHEV)



*e.g. VW Passat GTE,  
Mitsubishi Outlander PHEV*

3

Hybrid Electric  
Vehicles

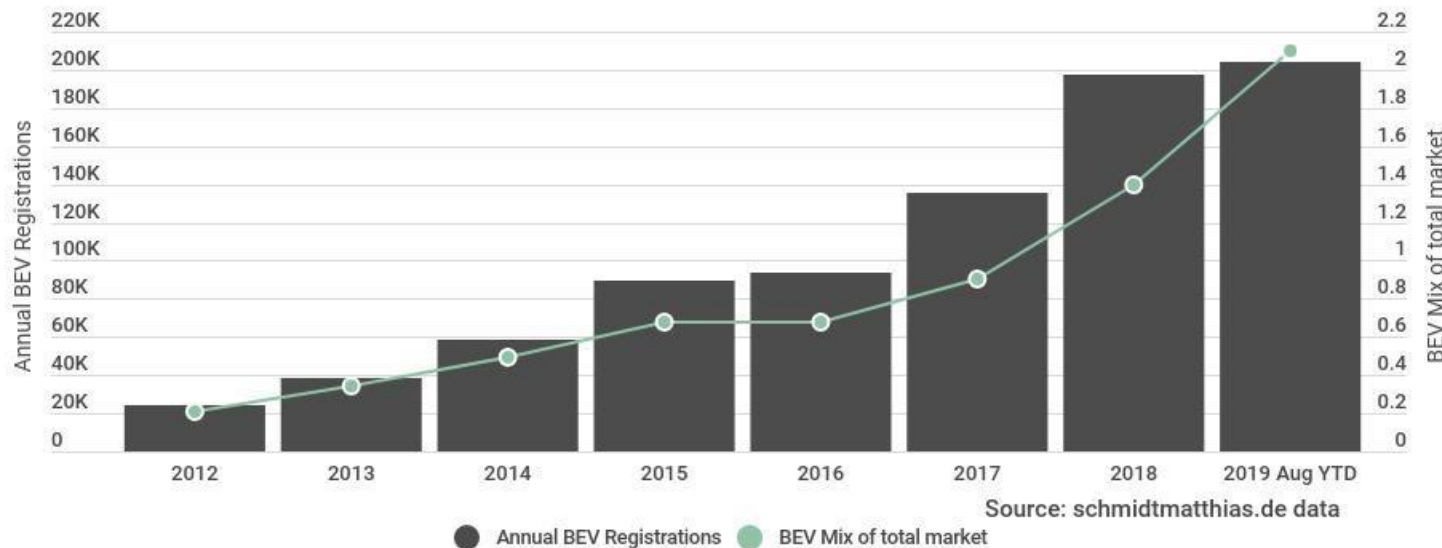


*e.g. Toyota Prius, Toyota  
RAV4, Kia Niro Hybrid*

# The Pace of Change

## Western Europe

8-months 2019 BEV electric car registrations surpass record FY 2018 levels | 2019 f-cast >300k



- Still a small overall % of new registrations
- Growth rate of BEVs is clear
- Reduction in battery costs, increase in single-charge range and increasing availability mean we're approaching 'tipping point' for BEVs now

# The Pace of Change

## Year to date

	YTD 2019	YTD 2018	% change	Mkt share -19	Mkt share -18
<b>Diesel</b>	410,012	508,047	-19.3%	27.0%	32.3%
<b>Petrol</b>	994,941	971,183	2.4%	65.5%	61.8%
<b>BEV</b>	17,393	9,009	93.1%	1.1%	0.6%
<b>PHEV</b>	17,594	27,918	-37.0%	1.2%	1.8%
<b>HEV</b>	60,989	50,739	20.2%	4.0%	3.2%
<b>MHEV diesel</b>	5,488	974	463.4%	0.4%	0.1%
<b>MHEV petrol</b>	12,599	4,116	206.1%	0.8%	0.3%
<b>TOTAL</b>	<b>1,519,016</b>	<b>1,571,986</b>	<b>-3.4%</b>		

**BEV** - Battery Electric Vehicle; **PHEV** - Plug-in Hybrid Electric Vehicle; **HEV** - Hybrid Electric Vehicle, **MHEV** - Mild Hybrid Electric Vehicle

- In the UK, BEV registrations are up 93% (only 1% of the market)
- Including PHEVs & HEVs the electrified segment = 7.5% of market YTD
- Availability of PHEV models has impacted (temporarily) their popularity
- Based on current government strategy, diesel new registrations will continue to erode – to be replaced with petrol and a mix of electrified drive-trains.



# Key Benefits to Running Electric Vehicles

1 | Whole Life Costs

2 | Performance

3 | Reliability

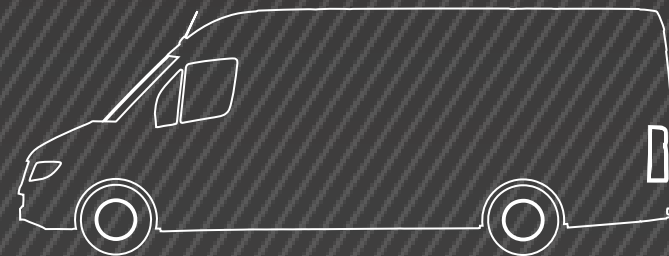
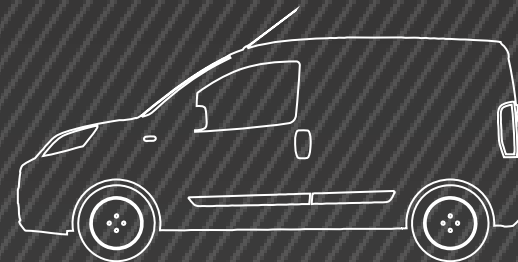
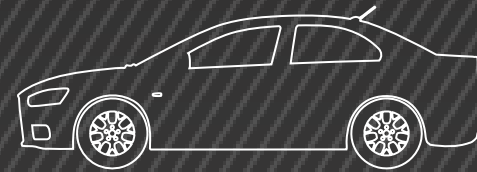
4 | Driver Satisfaction  
(inc. BLK)

5 | Environmental  
Benefits

6 | Convenience



# So where to start?



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# Ogilvie's 5-Point Plan

1 | Plan Comprehensively

4 | Manage Expectations

2 | Budget Realistically

5 | Run Trials & Gather Feedback

3 | Align With The Right Partners

# Key Policy Considerations



Training, Knowledge & Support



Managing Driver Behaviour



Charging Infrastructure & Usage



Reimbursement



The Right Time & Place For  
Change



Health & Safety



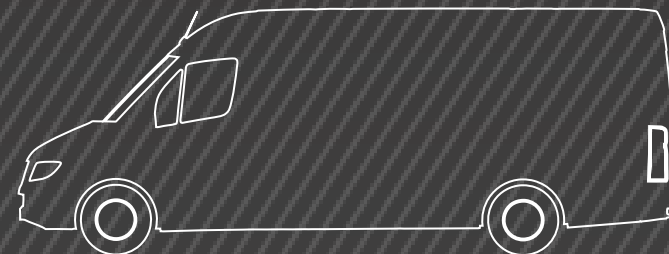
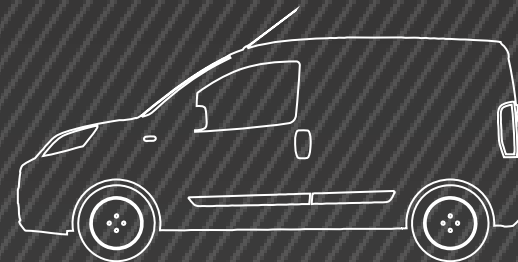
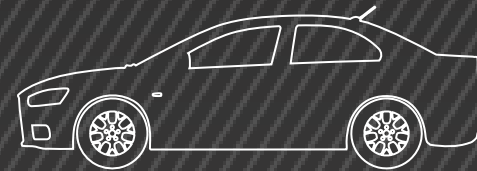
Vehicle Choice & Strategy



# Key Conclusions

- Vehicle electrification is a sea-change moment
- The next 12-18 months represents an opportunity to get ahead of the game
- Understand & assess your company's goals regarding electrification
- Plan & budget fully before implementing change
- Lean on your leasing, OEM and charging partners to guide & support your project
- Educate across the whole business from drivers to CEO
- Don't stop - review, reassess and adjust policy as the technology progresses
- Celebrate & promote the benefits electric vehicles bring to your business

# Thank you for listening



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