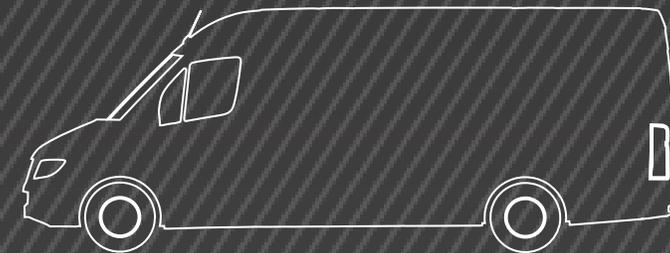
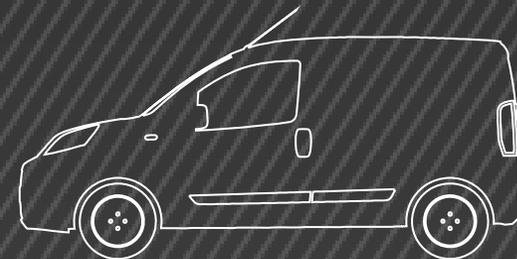
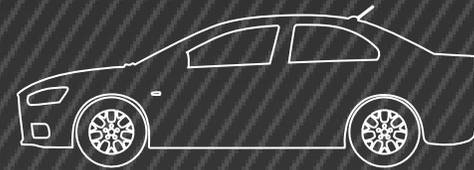


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Open.
Honest.
Transparent.

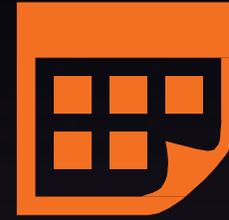


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Ogilvie Fleet

Overview

ESTABLISHED IN
1979



NET WORTH
IN EXCESS OF
£22m



20 AWARDS FOR
CUSTOMER SERVICE
AND TECHNOLOGY

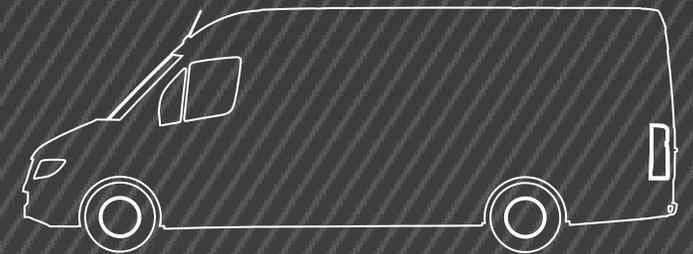
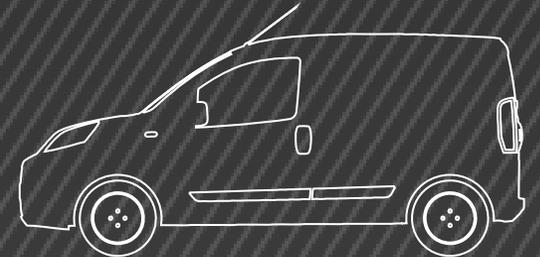
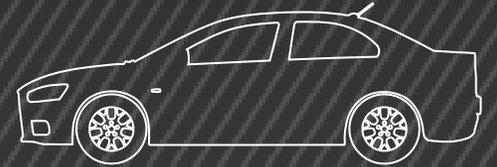
FN50 #18
FLEET SIZE
18,500

TURNOVER CIRCA
£129m



GROWTH
IN EXCESS OF
10%

Adoption of Electric & Plug- In Vehicles in UK Fleets



Jamie Arkell
Corporate Partner Manager
Ogilvie Fleet

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Agenda

Electric Vehicles & Hybrids

The Pace of Change

Key Benefits to Running EVs

So Where to Start?

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)



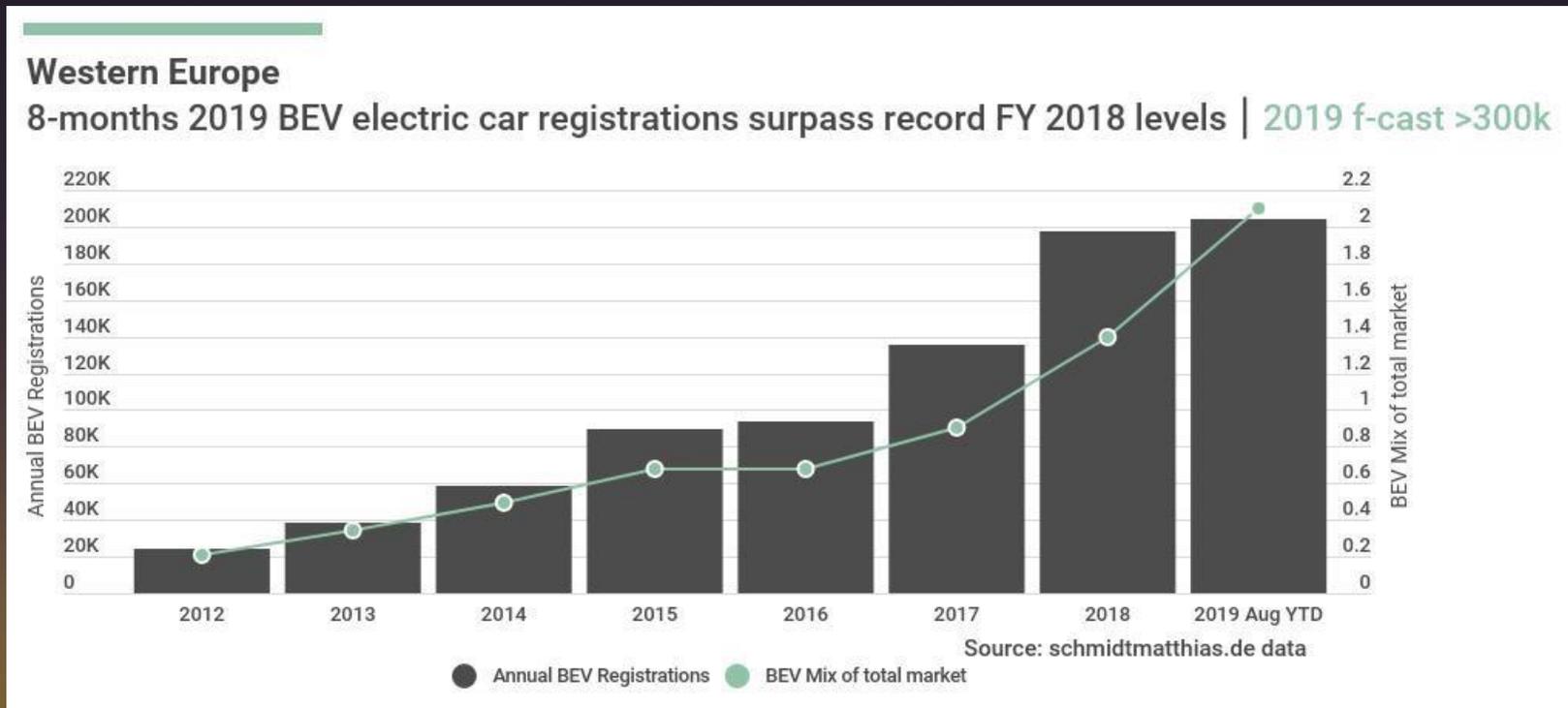
e.g. VW Passat GTE, Mitsubishi Outlander PHEV

3 | Hybrid Electric Vehicles



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

The Pace of Change



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

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

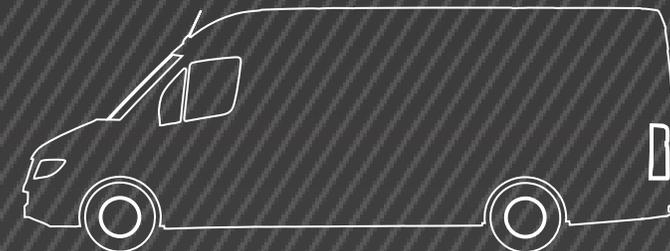
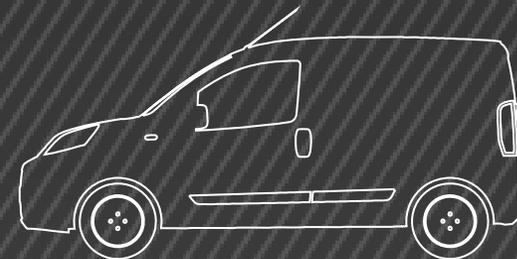
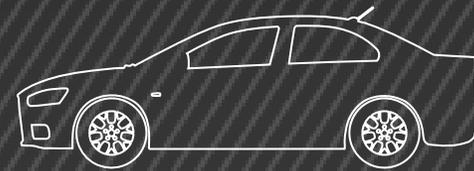
4 | Driver Satisfaction
(inc. BIK)

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

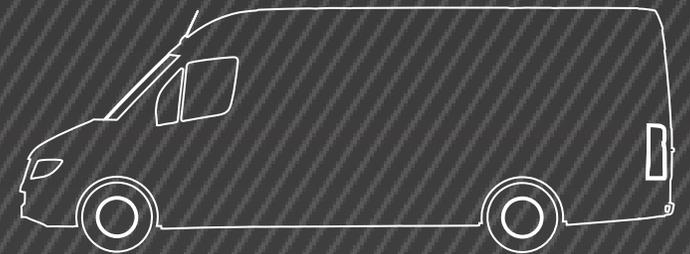
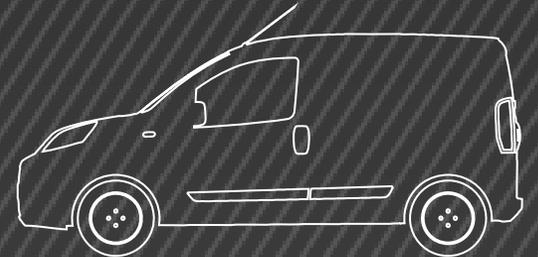
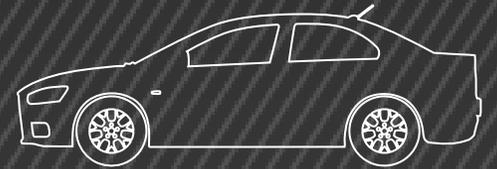


Vehicle Choice & Strategy

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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