

Energy - Docket Optical System

From: Tom Fulks [tfulks@mightycomm.com]
Sent: Thursday, July 25, 2013 1:21 PM
To: Energy - Docket Optical System
Cc: Olson, Tim@Energy
Subject: Docket No. 13-IEP-1L -- Transportation Energy Scenarios
Attachments: Bosch - 20130617_CP_CaliforniaEnergy Commission_dd2015.pdf

TN 71711

JUL 25 2013

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To the California Energy Commission,

Attached please find a presentation prepared by Robert Bosch Diesel Systems that was delivered to your IEPR staff on June 19, 2013, at your offices in Sacramento.

We were asked to submit this document to the CEC docket in preparation for the July 31, 2013, Joint Lead Commissioner Workshop on Transportation Energy Scenarios, and are happy to do so now.

The presentation may be useful to the CEC in that it covers the known new model rollout scenarios of light-duty diesel vehicles in the U.S. market through 2015. Given that light-duty diesel vehicles have a fuel economy performance of up to 35 percent higher than comparable gasoline vehicles, this diesel market penetration will directly affect the fuel use modeling being conducted now by your staff. If bio-based diesel fuels are factored in, then the modeling will be affected that much more.

This presentation was prepared by Andreas Sambel, Director of Marketing & Business Excellence, Bosch Diesel Systems North America. If you have any questions of Mr. Sambel about this presentation, please contact me and I will put you in touch.

Very warm regards,

Tom Fulks

Mightycomm

916.508.3837

California Energy Commission, June 19th 2013

Clean. Efficient. Diesel!
We shape the future of diesel.



Andreas Sambel
Director Marketing &
Business Excellence Diesel Systems North America

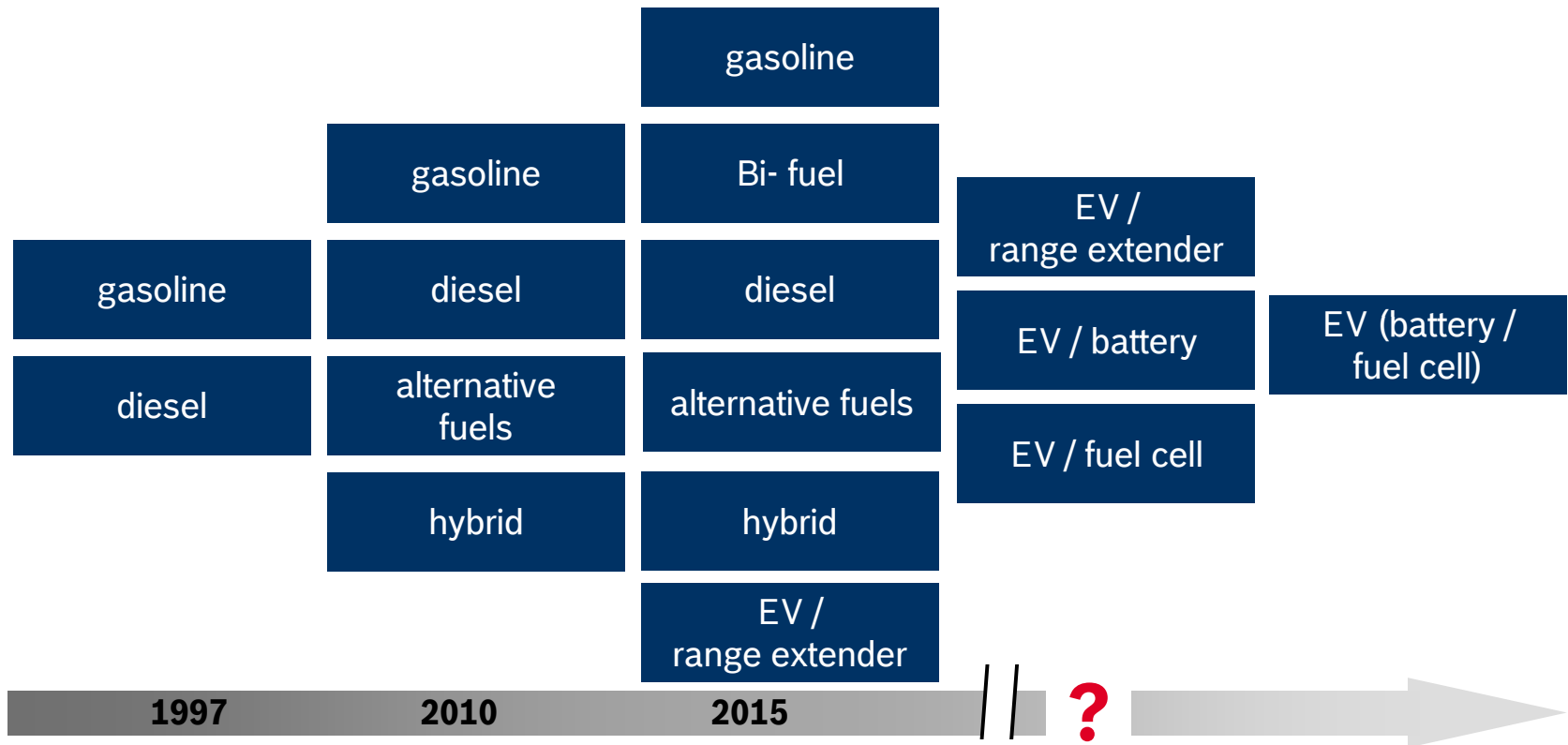
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Powertrain diversification for Today and the Future



Variety of Technical solution needed to address individual mobility needs

Long term convergence towards electrification

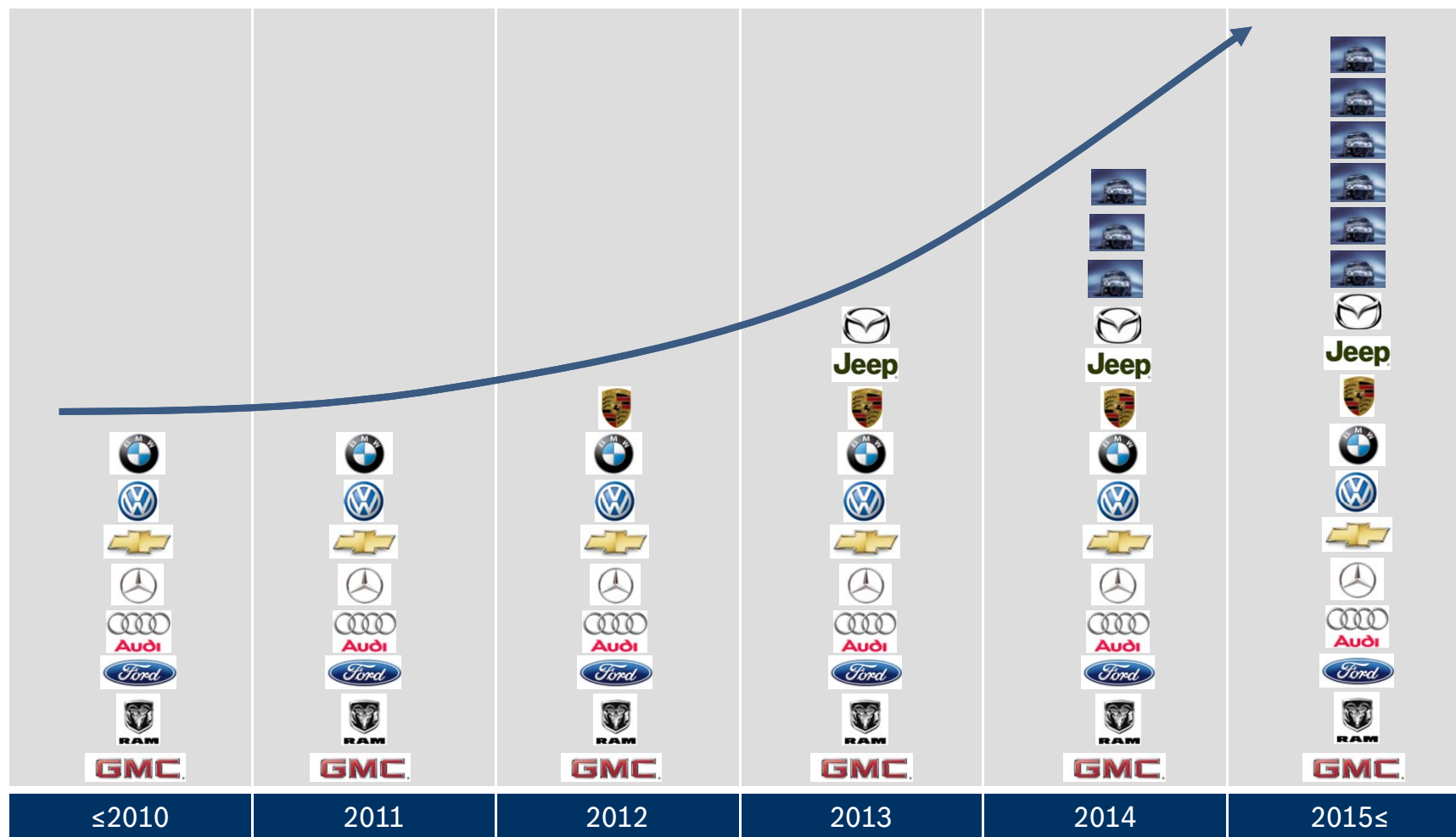
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U.S. Current Clean Diesel Models

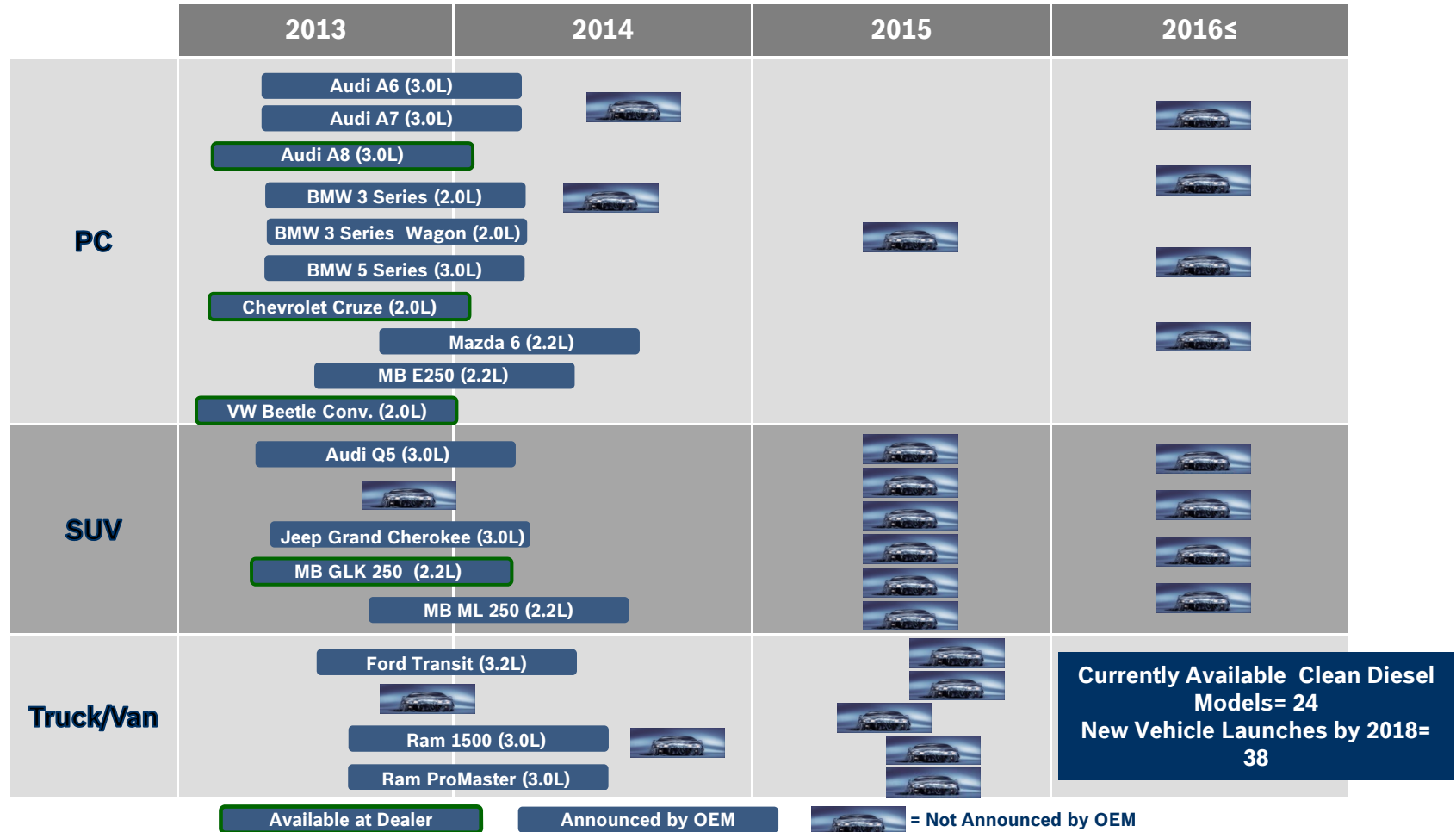
Available clean diesel models by
2012 = 20

	≤2009	2010	2011	2012
PC	Audi A3 (2.0L)		MB S 350 (3.0L)	
	MB E 350 (3.0L)			
	VW Golf (2.0L)		VW Passat (2.0L)	
	VW Jetta (2.0L)			VW Beetle (2.0L)
	VW Jetta Sportwagen (2.0L)			
SUV	Audi Q7 (3.0L)			
	BMW X5 (3.0L)			Porsche Cayenne (3.0L)
	MB GL 350 (3.0L)			
	MB ML 350 (3.0L)			
	VW Touareg (3.0L)			
Truck/Van	Chevrolet Silverado HD (6.6L)			
	Ford F Series Superduty (6.7L)			
	GMC Sierra HD (6.6L)			
	GM Vans (6.6L)			
	MB Sprinter (3.0L)			
	Ram HD (6.7L)			

Notes

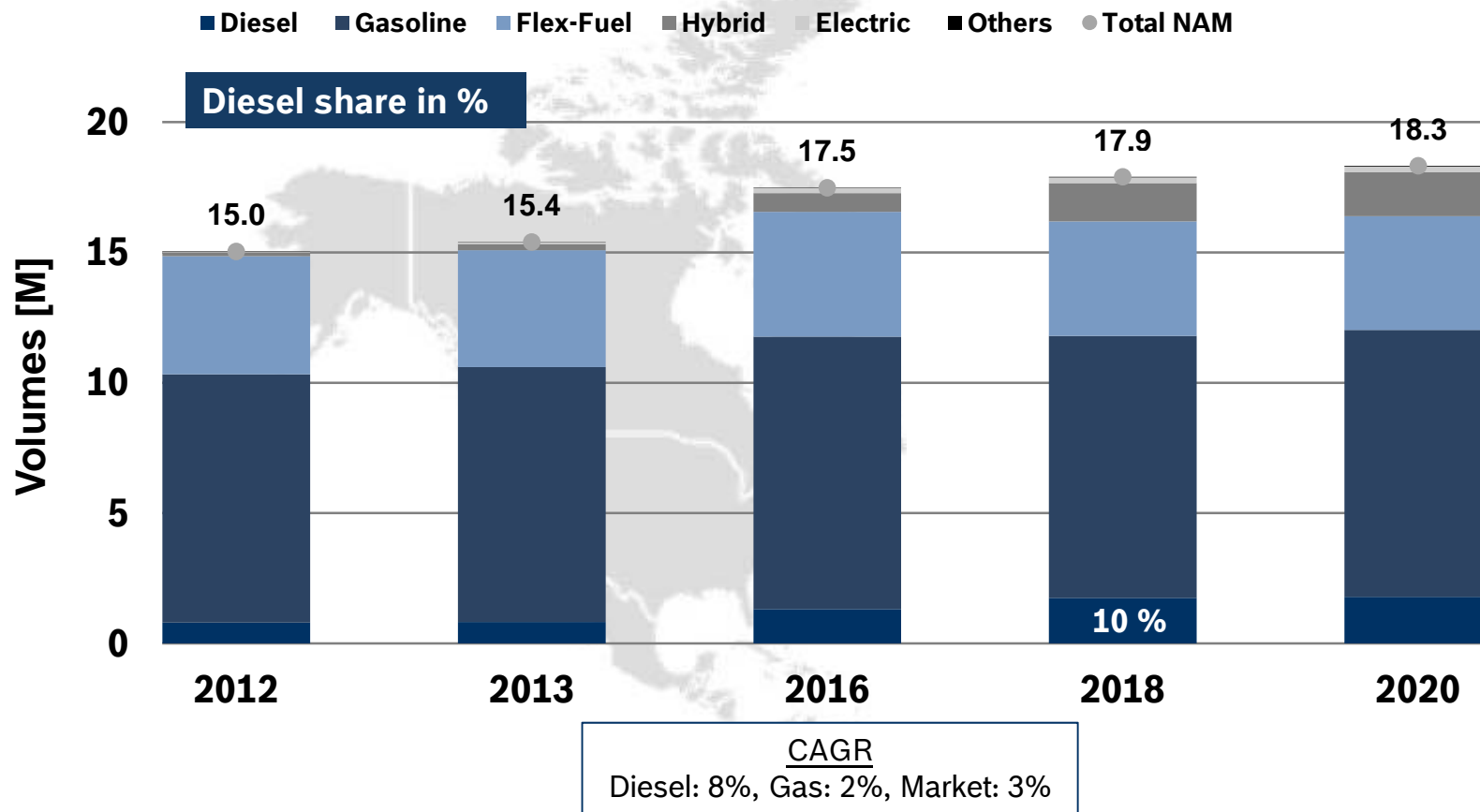
- Discontinued models (i.e. BMW 335d/MB R 350) removed.
- Launch time frame determined by first diesel launch not current diesel engine.
- There were no new clean diesel models launched in 2010.

U.S. Clean Diesel Vehicle Launch Calendar



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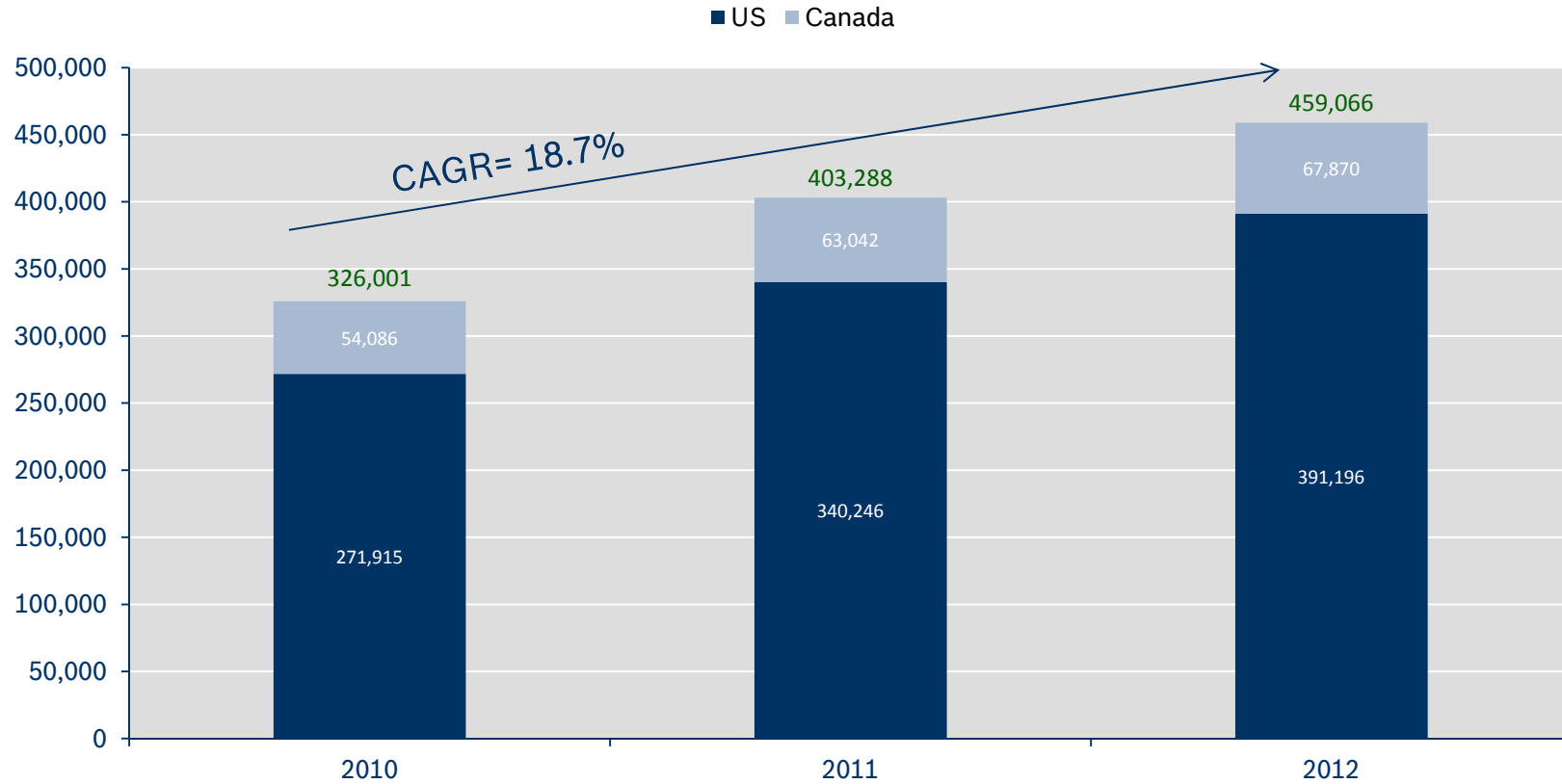
North American Light Vehicle Production



Clean Diesel expected to reach a market penetration of 10% by 2018 timeframe

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NAFTA Clean Diesel Registrations



Note: NAFTA total (class 1-3) registrations excludes Mexico due to unavailability of data.
* 2013 CYTD includes Jan through Mar 2013 registrations.

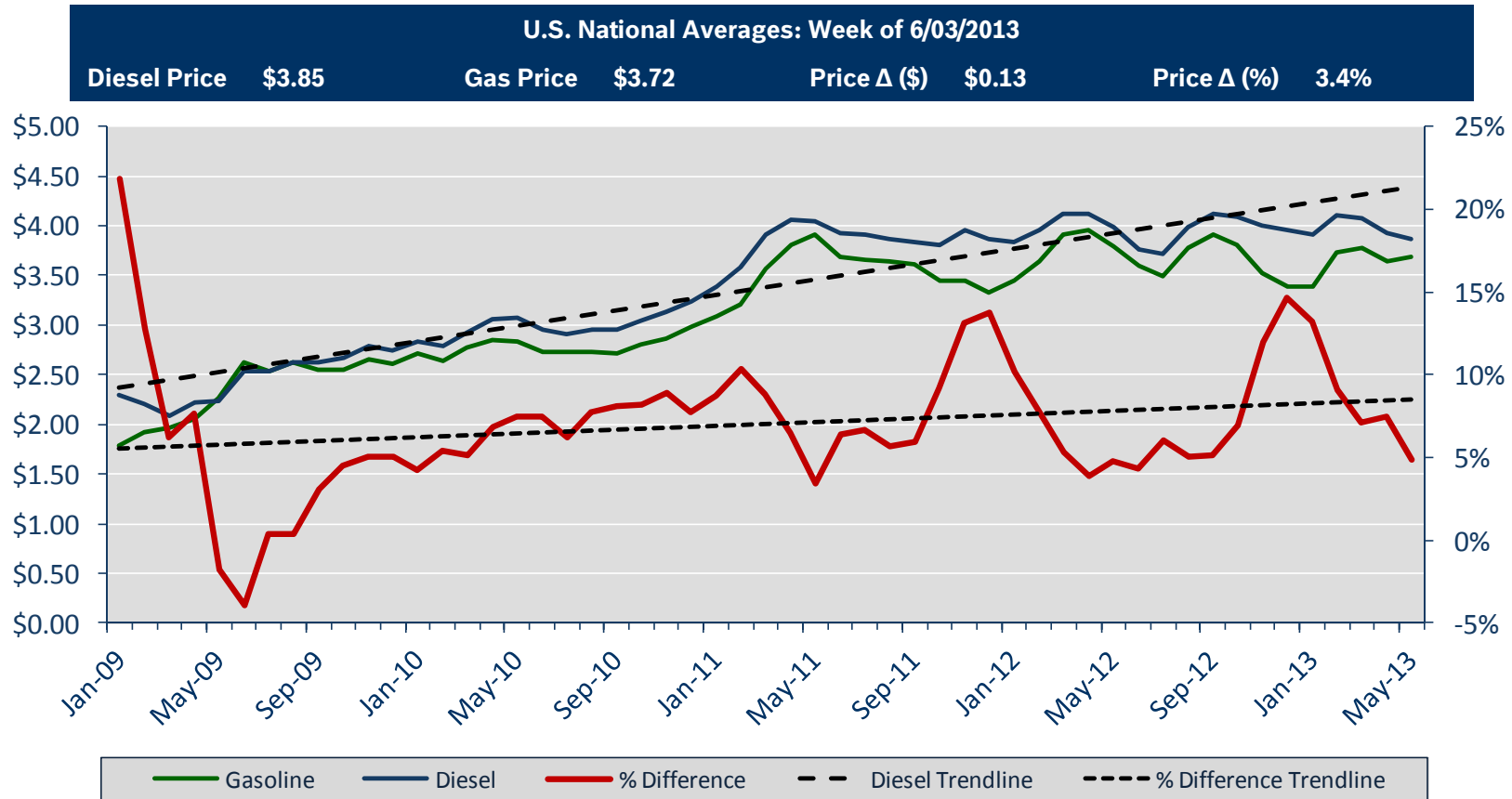
Source: Polk

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US: Diesel vs. Gasoline Price Delta Index

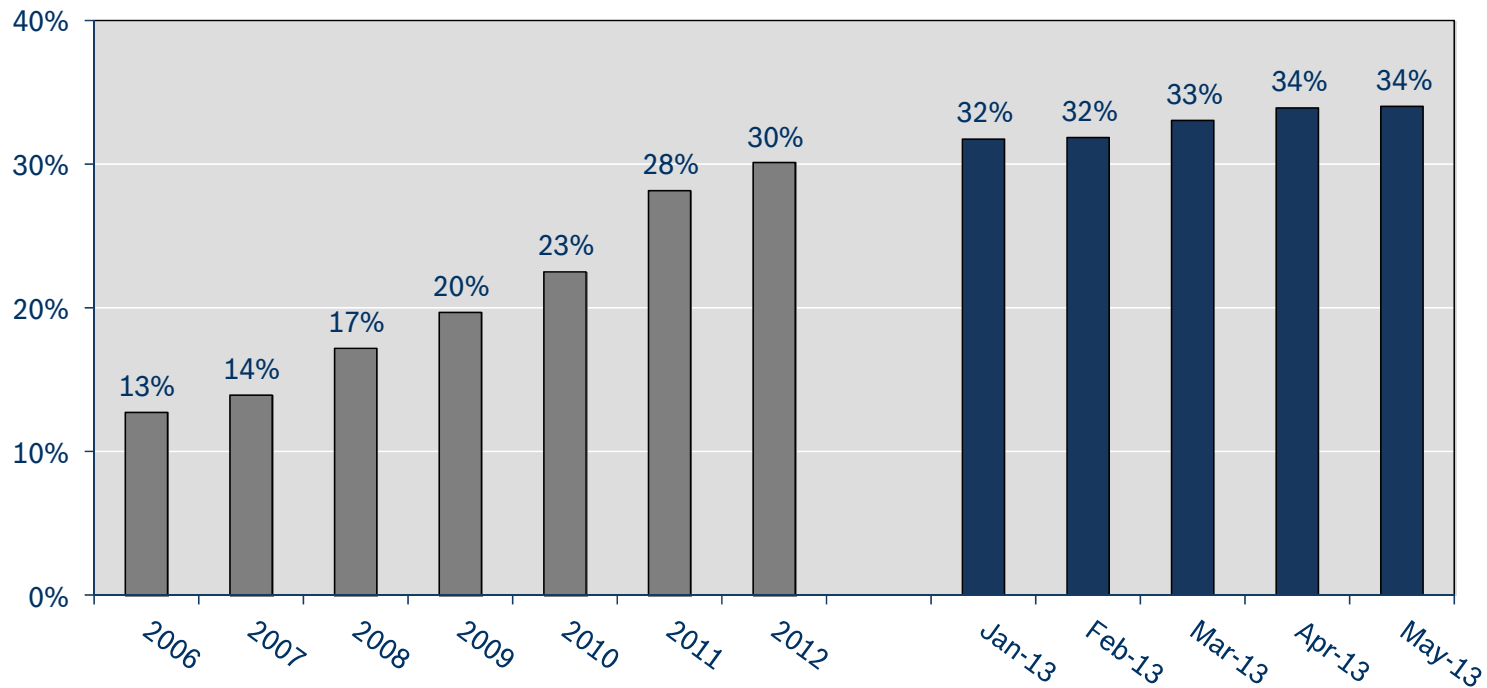


Sources: U.S. EIA

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Consumer Confidence Index

Consumers Considering Diesel

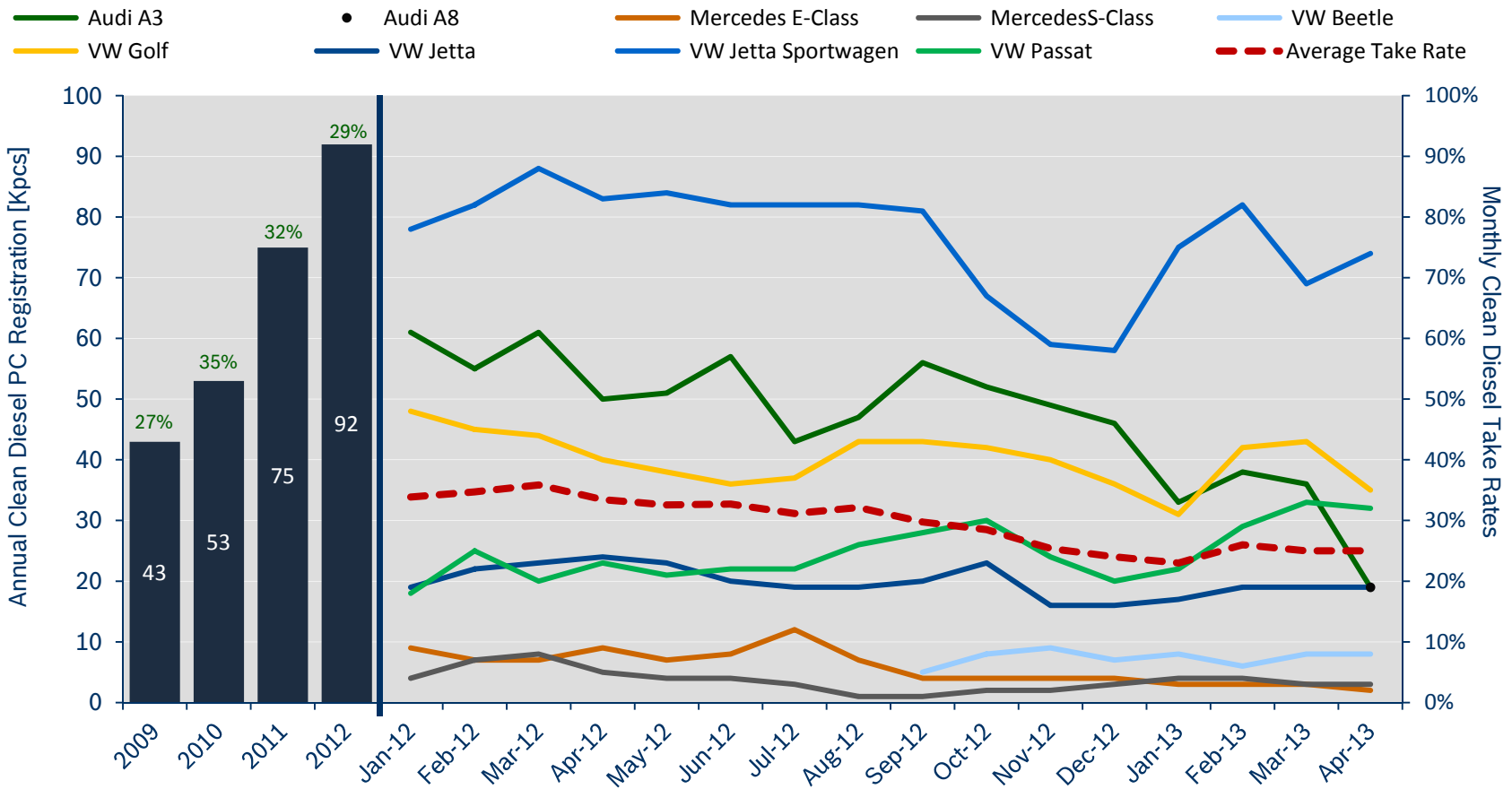


Note: Share of 10,000 new vehicle intenders that would consider purchasing a diesel

Source: CNW Research

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US Clean Diesel Take Rates: PC



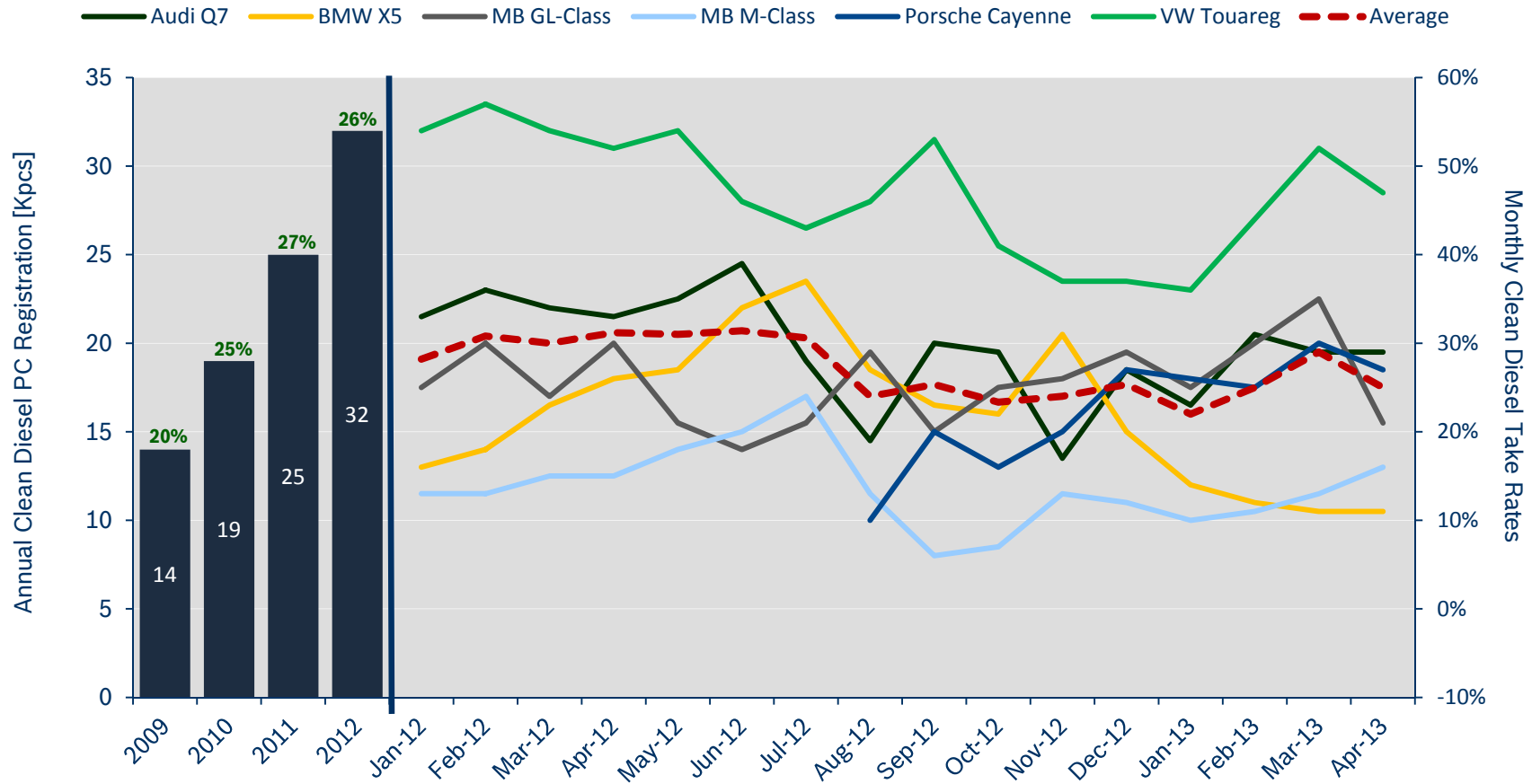
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US Clean Diesel Take Rates: SUV



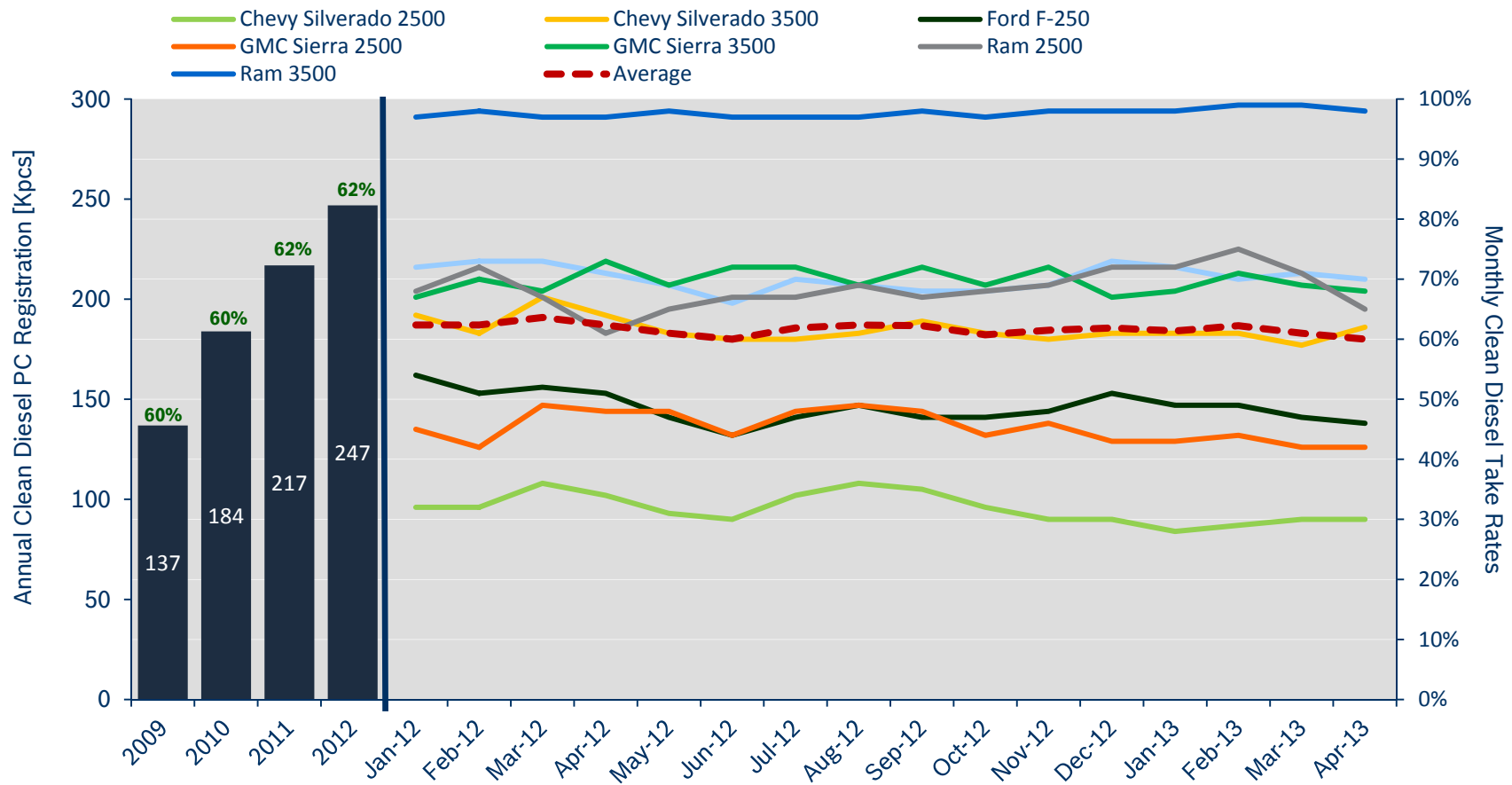
Source: Polk

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US Clean Diesel Take Rates: PU



Note: Annual average diesel take rate

Source: Polk

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