



The Essentials

The global automotive industry continues to face unprecedented challenges, not least of which is the global financial crisis and the most severe economic recession for over 50 years. The need for energy efficient vehicles has been brought sharply into focus by a combination of constrained consumer spending as well as the need to meet future CO₂ and fuel consumption limits. At the same time, government and local incentives will increasingly steer car buyers toward more efficient powertrain choices.

Diesel light vehicle demand has traditionally been driven by its strong fuel efficiency, and hence CO₂ performance. But the sector now faces new short term challenges from evolution in car market segmentation and from technology changes in the gasoline sector. In the mid- to long-term the threat to diesel from emerging hybrid and electric powertrain solutions will intensify. Equally, there are concerns over future imbalances in the supply of middle distillate fuels versus gasoline.

How will the very significant European diesel sector evolve over the next decade in light of these challenges? Will diesel gain a foothold in the US market despite high diesel fuel prices and a growing hybrid light vehicle sector? Will concerns over diesel emissions continue to stifle diesel development in Japan, or halt further growth in India? Will China simply leapfrog traditional technologies such as diesel in favour of hybrid or electric solutions?

In response to these questions, and to customer demand, J.D. Power Automotive Forecasting will be publishing the fourth edition of the *Global Markets for Diesel Powered Light Vehicles* study at the end of the third quarter, 2009. We will be revisiting and re-evaluating the assumptions and conclusions reported in the three previous editions (published in 2003, 2005 and 2007) and extending the forecast horizon for 49 major markets to 2019.

The latest edition of this wide-ranging and in-depth global analysis of the demand for diesel-powered light vehicles will re-examine the complex array of factors that drive demand, and will provide detailed forecasts of future diesel penetration (by country and segment, and by country and make) with history from 2002 and forecasts to 2019.

Content

- Coverage of five global regions and 49 national markets;
- Review of key fiscal and regulatory changes in major regions and markets, including future planned and likely emissions standards and the effect of these changes on diesel penetration rates;
- Overview of technical developments in the diesel light vehicle sector and their likely influences on diesel competitiveness and market share;
- Review of the diesel light vehicle strategies of the major OEMs;
- Brief overview of developments in the gasoline sector, alternative powertrains and of the potential impact of hybrid and electric vehicle penetration on diesel shares;
- Global forecasts of diesel penetration to 2019, by country and segment, and by country and make.

Deliverables

- Electronic download of the data and forecasts. The data can also be downloaded from our web site by any of the subscribing clients' personnel;
- A comprehensive set of MS PowerPoint® slides illustrating the forecast methodology, the key drivers of light vehicle diesel markets and the activity of the key players;
- Access to our industry staff for clarification or general discussion of the study for six months after receipt of the report;
- One complimentary invitation to any J.D. Power Automotive Forecasting Conference held within six months of the subscription date.

Availability and Costs

- The study will be published in September 2009;
- For customers who subscribed to the earlier editions of the study, the fee for the new edition is €7,800 / U.S.\$10,000;
- For customers who did not subscribe to the earlier editions of the study but wish to subscribe to the new edition, the fee is €9,750 / U.S.\$12,500;
- Customers who support this project at an early stage will be entitled to a 10% discount off the published prices. Qualifying period for this discount is to the end of June 2009.

For further information on this service, please contact:

J.D. Power Automotive Forecasting
www.jdpowerforecasting.com

North America

5435 Corporate Dr., Suite 300, Troy, MI 48098, USA
Tel: +1 (248) 267-6800; Fax: +1 (248) 267-6840
E-mail: forecasting@jdpa.com

Europe

60 St Aldates, Oxford, OX1 1ST, UK
Tel: +44 1865 207040; Fax: +44 1865 791252
E-mail: autoforecasting@jdpa.com