

## Driving e-mobility Economic stimulus and other support spur development of alternative vehicles

### About the automotive analysis

The following is an analysis by Deloitte Touche Tohmatsu (DTT) Global Manufacturing Industry group summarizing the government economic stimulus efforts and incentives around the world. The data and information was collected and compiled using various external media sources based on information available from around November 2008 to end of February 2010. For the purpose of the analysis, 25 key automotive markets were evaluated spanning

countries in the Americas, Asia-Pacific, and Central and Western European regions. Countries/markets included in the summary are: Argentina, Australia, Austria, Belgium, Brazil, Canada, Central and Eastern Europe, China, Denmark, France, Germany, India, Ireland, Israel, Italy, Japan, Mexico, Netherlands, Portugal, Russia, South Korea, South East Asia, Spain, United Kingdom, and the United States.



Figure 1:

US \$44 billion on economic stimulus and incentives directed to alternative fuel vehicles – Country by country comparison

Country	Number of cars produced per 1,000 population <sup>a</sup>	Total passenger car sales 2009 (in '000) <sup>a</sup>	Total passenger car forecast 2010 (in '000) <sup>a</sup>	Value of economic stimulus package (in US\$) (as of February 2009)	New economic stimulus funds (in US\$) from March 2009 to February 2010	Value pertaining to auto industry in the economic stimulus package (in US\$) (as of February 2009)	New stimulus funds to auto industry in economic stimulus (in US\$) from March 2009 to February 2010	Stimulus supports alternative fuel technology?	Total alternative vehicle support (\$ billions)	Stimulus incentivizes the replacement of old vehicles?
Argentina <sup>1</sup>	164	369	378	\$36.5B	-	\$1B	-	N	-	N
Australia <sup>2</sup>	573	542	590	\$34B	-	\$5.57B	-	Y	\$1.17B <sup>3</sup>	N
Austria <sup>4</sup>	513	284	283	\$4B	-	\$0.06B	-	Y	\$0.057B <sup>5</sup>	Y
Belgium <sup>6</sup>	484.2	489	473	\$4.46B	-	-	\$0.39B	Y	\$0.39B	N
Brazil <sup>7</sup>	110	2,475	2,623	\$100B	-	\$5.3B	-	N	-	N
Canada <sup>8</sup>	573	759	771	\$32B	-	\$3.28B	-	N	-	N
Central and Eastern Europe <sup>#9</sup>	337.4	767	712	\$10.65B	-	\$0.2B	-	N	-	Y
China <sup>10</sup>	28.3	10,352	11,460	\$586B	-	\$2.23B	-	Y	\$1.5B	Y
Denmark <sup>11</sup>	384	108	121	\$24.42B	\$0.966B	-	-	Y	\$0.548B <sup>12</sup>	N
France <sup>13</sup>	501	2,269	2,093	\$42.5B	-	\$1.32B	\$9.42B <sup>14</sup>	Y	\$8.549B <sup>15</sup>	Y
Germany <sup>16</sup>	478	3,807	3,177	\$110B	-	\$4B	\$4.7B	Y	\$0.950B <sup>17</sup>	Y
India <sup>18</sup>	11.6	1,681	1,940	\$8B	-	-	-	N	-	N
Ireland <sup>19</sup>	424	90	95	\$5.3B	-	-	-	Y	-	Y
Israel <sup>20</sup>	268	175	183	\$5.4B	-	-	-	N	-	N
Italy <sup>21</sup>	581	2,098	2,134	\$103B	\$0.560B	\$2.56B	-	Y	\$0.707B	Y
Japan <sup>22</sup>	493	3,924	4,264	\$421B	\$429B	-	\$3.7B	Y	\$1.20B	Y
Mexico <sup>23</sup>	164	448	485	\$54B	-	\$0.648B	-	N	-	N
Netherlands <sup>24</sup>	480	388	390	\$42.7B	\$8.0B	-	\$0.129B	N	-	Y
Portugal <sup>25</sup>	423	161	180	\$2.9B	-	-	\$0.034B	N	-	Y
Russia <sup>26</sup>	204	1,466	1,617	\$220B	-	-	-	N	-	N
South Korea <sup>27</sup>	346	1,027	1,115	\$141B	\$12.660B <sup>28</sup>	-	-	Y	\$0.340B <sup>29</sup>	Y
SE Asia <sup>^30</sup>	175.85	886	965	\$33.02B	\$18B	\$0.282B	-	N	\$0.282B	Y
Spain <sup>31</sup>	488	941	1,064	\$14.8B	\$94.2B	\$1.08B	\$5.38B	Y	\$0.576B	Y
UK <sup>32</sup>	513	1,995	1,951	\$34.5B	-	\$3.29B	-	Y	\$0.650B <sup>33</sup>	Y
US <sup>34</sup>	434	10,346	11,400	\$1678B	-	\$50.8B*	-	Y	\$27.4B <sup>35</sup>	Y
			Total	\$3,748.15B	\$563.39B	\$81.62B	\$23.75B		\$44.32B	
			Grand Total	\$4,311.54B		\$105.37B				

> Source: The Economist Intelligence Unit

<sup>^</sup> SE Asia includes – Malaysia, Singapore, Thailand, and Taiwan

<sup>#</sup> Central and Eastern Europe includes – Czech Republic, Hungary, Poland, Romania, and Slovakia

\* U.S. Auto Stimulus includes \$27.4 billion loan given to companies under Advanced Technology Vehicles Manufacturing Loan Program

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