


Market strategy for Maribor, SLOVENIJA

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Are there existing filling stations and natural gas and biogas driven cars already in the region?	No

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Summary

In Slovenia there is no existing filling station for CNG and there are only four productions of biogas but they produce the biogas in cogeneration system for heat and electricity production.

There are only 10 filling stations in Slovenia with LPG.

There is no legislation about the biogas production and there are no special programmes or documents about using the gas as a vehicles fuel. We have only one ordinance about the use of biofuels. There the use of biogas is described as a biofuel.

In Slovenia we have National energy plan where the sustainable transport is described only as using alternative fuels (the biogas is not mentioned) and promotion of public transport. There is no activity on the national level about gas driven cars. They have started only with electric car promotion.

Since there is no infrastructure for such vehicles there is also not the possibility to buy gas vehicles. There are very few persons that can unofficial (without the attestations) convert the vehicle from petrol to natural gas.

The use of natural gas in Slovenia does not have a long tradition. It has come to Slovenia in late 70s. People are quite afraid of using it at homes. The market for natural gas as a heating source has expanded in last 15 years.

In last two years we have built only two or three biogas production plants in Slovenia.

Regarding the background situation in Slovenia in the first stage we have to develop the market for gas driven cars. At the same time we can promote the production and usage of biogas. In the second step it will be possible to promote the use of biogas in cars.

The possible strategy for Slovenia and special for region of Podravje, Maribor, is to prepare the example as a show case in public transport. The idea would be to have the natural gas driven bus in city centre. In cooperation with municipality, gas supply company and transport company it would be possible to show all the advantages of using the gas in buses (energy, environment- PM and noise protection and economy).

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Introduction/Background

Understanding the market is crucial when building a successful market strategy which in this project is the first stage in the planning of market activities (which will be done in WP3, 4 and 5). The first part of the strategy is therefore an analysis of the market. When making the analysis one will find out which obstacles and possibilities that exist on the market. The Strategy shall determine within which fields to work in your region to overcome the obstacles for methane gas as a vehicle fuel on the market and lift the possibilities.

Describe, in general, the market where this all takes place (se figure 1 below for inspiration), are there many different smaller actors or a few large ones etc.?

How has the concept and the market developed in your region, which phase has it reached?

Have there been any critical episodes/incidents for the “methane gas as vehicle fuel concept” on your market?

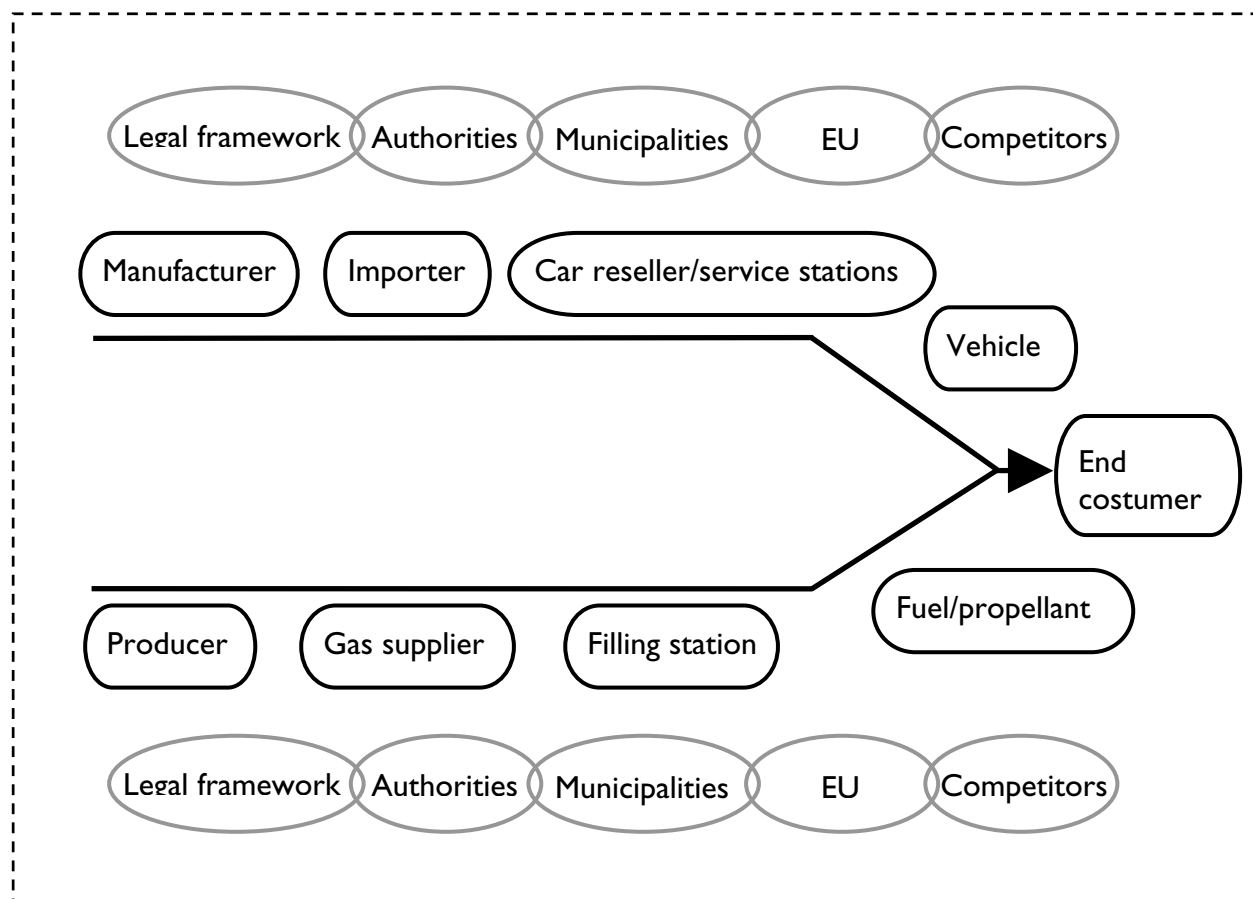


Figure 1. An overview of the gas market and its actors. From producers of gas and vehicles to the end costumer.

Analysis of the different aspects of the gas market

Analysis of the surroundings

Are there any factors in the surroundings (Juridical, economical etc.) that have influence on the production, distribution and use of methane gas in vehicles in a positive or negative direction?

Are there any political standpoints, for example decisions made to promote the use of alternative fuels in the transport sector? Or maybe the opposite?

When looking at biogas production, how does it look with the access of raw materials to the biogas process?

Etc. etc.

Market inquiry

How has the market for production of biogas, distribution and use of natural gas and biogas in vehicles developed over time?

Are there any clear trends on the market, for example a growing share of clean vehicles etc.?

This information will be useful for WP4 and WP5 - Number of sold NGVs (personal cars and light transport vehicles) per year compared to total sales of vehicles in the region. What is the share for CNG as a fuel for vehicles compared to the total use of vehicle fuel in the region? How will the vehicle market develop over a period of time, e.g 20 years?

Analysis of the concept “methane gas as vehicle fuel”

This information will be useful for WP 4 and WP5 - Which are the experiences so far with production of biogas, treatment and distribution of biogas and natural gas, and the use of methane gas as a vehicle fuel in the region?

Which factors are unique for the concept “methane gas as vehicle fuel” that distinguishes the concept from the other available fuels on the market?

Which are the strengths and weaknesses of the concept? (in the region)

Are there any financial advantages or disadvantages with the concept compared to the competitive fuels (both the traditional and alternative fuels)?

Are there any technical advantages or disadvantages with the concept of using gas in vehicles in the region?

Is the use of natural gas and biogas in vehicles associated with a distinctive image in the region? For example, is it seen as a fuel for those with certain interest in climate, health and environment? Do companies see it as goodwill to use methane gas in vehicles?

Analysis of competitive products

Which products is methane gas competing with on the market? –petrol, diesel, ethanol/E85 etc.

Which are the competitive products strengths and weaknesses?

Analysis of costumers/consumers – This section will be useful for WP4 and WP5!

Which experiences have been made from costumer behaviour in the region, which factor(/s) have been crucial for costumers or suppliers to choose NGVs and CNG?

Which attitudes and values exist on the market? (can gas driven vehicles fulfil these values?)

Are there any preconceptions on the market? For example about low second hand value of NGVs, difficulties with fuelling stations, short operating range of NGVs, safety issues, etc.

How is the costumers' knowledge of biogas, and natural gas (All aspects from production, distribution, and use in vehicles)?

Short and long term threats and possibilities

Are there any arguments for producing biogas, distribute natural gas or biogas, or using the gas in vehicles that might change over time, or even fade away?

Bottlenecks on the gas market

Are there any bottlenecks on the gas market? Follow the distribution link from the producers to the end costumer and localise which actors on the market that are suppressing the gas market development/expansion. Can this/these groups be processed in the MADEGASCAR project? Are these groups the projects target groups in the region?

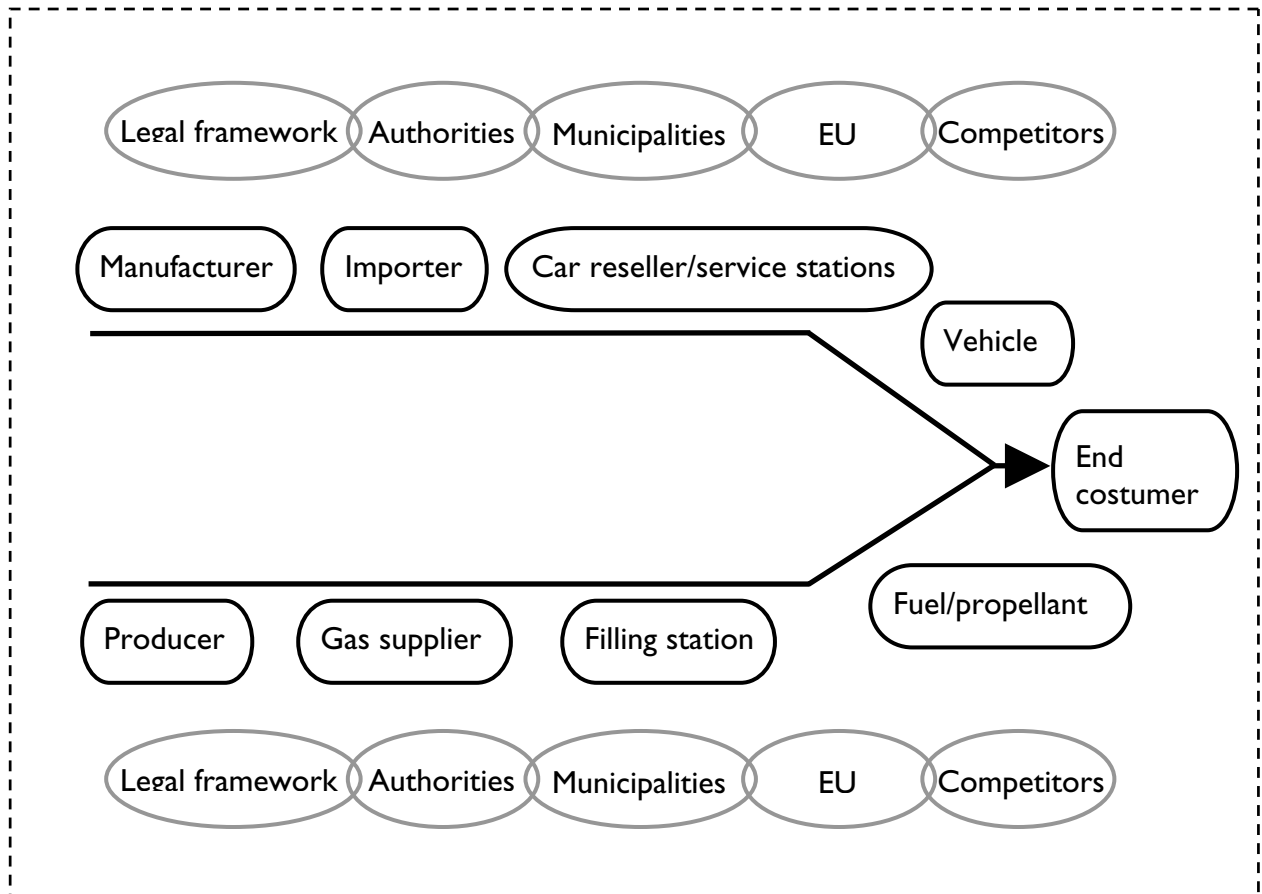


Figure 2. An overview of the gas market and its actors. From producers of gas and vehicles to the end costumer.

Market Strategy

It shall appear in the market strategy which target group/s the project intends to address with its efforts/activities.

Message

The gas concepts policy, what are we promoting and which image shall we send out?

For example:

- *Biogas - an alternative and renewable vehicle fuel with market leading features when it comes to climate, environment and health aspects.*
- *Natural gas - an alternative fuel with positive features/characters (although it is a fossil fuel) when it comes to environmental effects and health aspects.*
- *An alternative fuel that can be delivered at a low cost*
- *Etc.*

Choice of target group and distribution strategy

*Which strategy shall be used when distributing information/message about the concept with biogas and natural gas to vehicles? THIS SECTION SHALL BE SEPARATED IN THE FOLLOWING FOUR AREAS; **vehicle expansion, biogas supply, gas grid expansion and filling station expansion.***

Vehicle expansion

- *Geographically – shall the information/message be spread evenly over the region, or shall some areas be prioritised? In that case, which type of areas? Areas where there already is an interest for NGVs, or areas where there are no interest? etc.*
- *Target groups*
 - *Shall the information/message be aligned against end users to raise the demand, or against producers to raise the supply? For example, against companies with vehicle fleets or against the car reseller?*
 - *Shall the information/message be spread to those who already have started to consider buying gas driven vehicles, or shall the information/message be aligned to those who have not yet shown any interest?*
 - *Shall the information/message be pointed to those who are suppressing the market expansion (the bottlenecks) or shall those groups who already are “going in the right direction” be prioritised?*
 - *Etc.*
- *Personal “sales” vs. mass impact/influence - **do it synoptically, this information will be processed more detailed in WP4 and WP5***
- *Distribution channels - **do it synoptically, this information will be processed more detailed in WP4 and WP5)***

- *Which type of distribution channels shall be used?*
- *Are there any incentives, goals, restrictions to be found for the possible distribution channels?*
- *Etc.*

Biogas supply

Same questions to answer as for vehicle expansion above

Gas grid expansion

Same questions to answer as for vehicle expansion above

Filling station expansion

Same questions to answer as for vehicle expansion above