LOW CARBON TRANSPORT OPTIONS

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MOBILITY IS CRITICAL TO OUR DAILY LIVES.

Transport accounts for a quarter of global energy use and energy-related CO₂ emissions.
Countries are developing renewable fuels mandates – legislative priorities differ.

All fuel options and drive trains will be needed.

Countries and regions will choose different portfolios.

Fuel and drive train options will also vary within countries.

Internal combustion engine and liquid fuels will continue to play an important role.

MOSAIC OF FUEL AND VEHICLE OPTIONS
## Feasible Fuel Solutions

<table>
<thead>
<tr>
<th>Fuel Type</th>
<th>2/3 Wheelers</th>
<th>Cars</th>
<th>Mid &amp; Heavy Duty</th>
<th>Sea</th>
<th>Air</th>
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</tbody>
</table>

### Notes
- **Widespread Potential**: Green
- **Restricted Use**: Yellow
- **Not Feasible**: Red

1 Unconstrained potential, practical deployment concepts
### BIOFUELS WILL BE PART OF THE FUTURE MOBILITY MIX

<table>
<thead>
<tr>
<th>CO₂ EMISSIONS REDUCTIONS: &gt;60 countries have biofuels mandates</th>
<th>HDV, AVIATION &amp; MARINE TIED TO LIQUIDS FOR MANY YEARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>DIVERSIFICATION AND ENERGY SECURITY</td>
<td>RURAL DEVELOPMENT OPPORTUNITIES</td>
</tr>
<tr>
<td>INTEGRATION WITH EXISTING INFRASTRUCTURE</td>
<td>SIGNIFICANT BIOMASS POTENTIAL &gt; 20mboe by 2050</td>
</tr>
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</table>

- **MOST AFFORDABLE** option with **LOWEST ENTRY BARRIERS** to reduce carbon in transport across **ALL MODES** of transport.

- **BIOFUELS COULD PROVIDE 2/3 ALL TRANSPORT REQUIREMENTS FOR LIQUID FUELS** by end of century (NLS OCEANS)
Global energy demand in transport will continue to increase beyond 2030, despite the decline anticipated in many OECD countries.

Vehicle efficiency improvements will be essential for reducing emissions.

There is no single “silver bullet” fuel option that will deliver sustainable mobility over the coming decades for all modes and geographies.

Electric drive (including Hydrogen FCEV) could provide material contributions on the 2050 decarbonisation timescale but will need significant government support and cleaner power.

During this transition, alternative liquid fuels such as biofuels will play a key role.

Shell believes that the efficient decarbonisation of road transport requires collaboration and an integrated approach.