LeasePlan

2020 Fleet Sustainability Ranking by industry

A comprehensive analysis of the industry adoption of sustainability across 24 European countries

LeasePlan International Consultancy Services

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Context

- Transport is the fastest-growing contributor to climate change, with road transport accounting for approximately 20% of carbon dioxide emissions in the EU alone.

- Approximately 50% of vehicles on the road today are registered to corporate organisations. Corporates are therefore incredibly important in leading the transition to a more sustainable transport system.

- Making the switch to a low-emission fleet is one of the easiest ways for businesses to reduce their overall emission footprint and to help tackle climate change. It can be done with very little effort; no change of strategy is required.

About the 2020 Fleet Sustainability Ranking

- LeasePlan's Fleet Sustainability Ranking by Industry is a comprehensive analysis of the differences in the rate of sustainable adoption between 10 industries across 24 European countries. The 2020 ranking is the 2nd edition.

- The ranking is based on four factors: the share of diesel, the share of battery electric vehicles (BEVs), the share of hybrids and the level of CO_2 emissions.

- The study covers all passenger cars leased from LeasePlan by companies operating an international fleet (500,000+ vehicles). To ensure that the data is representative, in each country included a total of at least 500 vehicles must be leased by at least 10 different companies.

- The ten industries included in the research are: Automotive, Construction, Consumer Goods, Energy & Chemicals, Financial & Professional Services, Healthcare, Industrial, Pharma, Technology, and Transport.*

*For a definition of all ten industries, please see Annex A: Definition of industries

Key findings

Fleet Sustainability Ranking 2020

- The three industries leading the trend away from fossil-fuelled vehicles are Financial & Professional Services, Energy & Chemical and Technology. These industries score consistently highly on all the fleet ranking criteria.
- The Financial & Professional Services industry has emerged as the best performer for the second consecutive year. The industry shows a strong decline in diesel, plus the biggest share of BEVs and the lowest CO_2 emission average out of all the industries.
- The BEV share is really taking off, with some industries having increased their share tenfold in the past two years.
- Overall, all industries show an increase in CO_2 emission averages* due to the increasing popularity of SUVs and the increasing share of petrol vehicles (which generate relatively high CO_2 levels).

* Also, due to the transition from NEDC to WLTP CO_2 values are reported with higher values compared to previous years.

2020 Fleet Sustainability Ranking by Industry

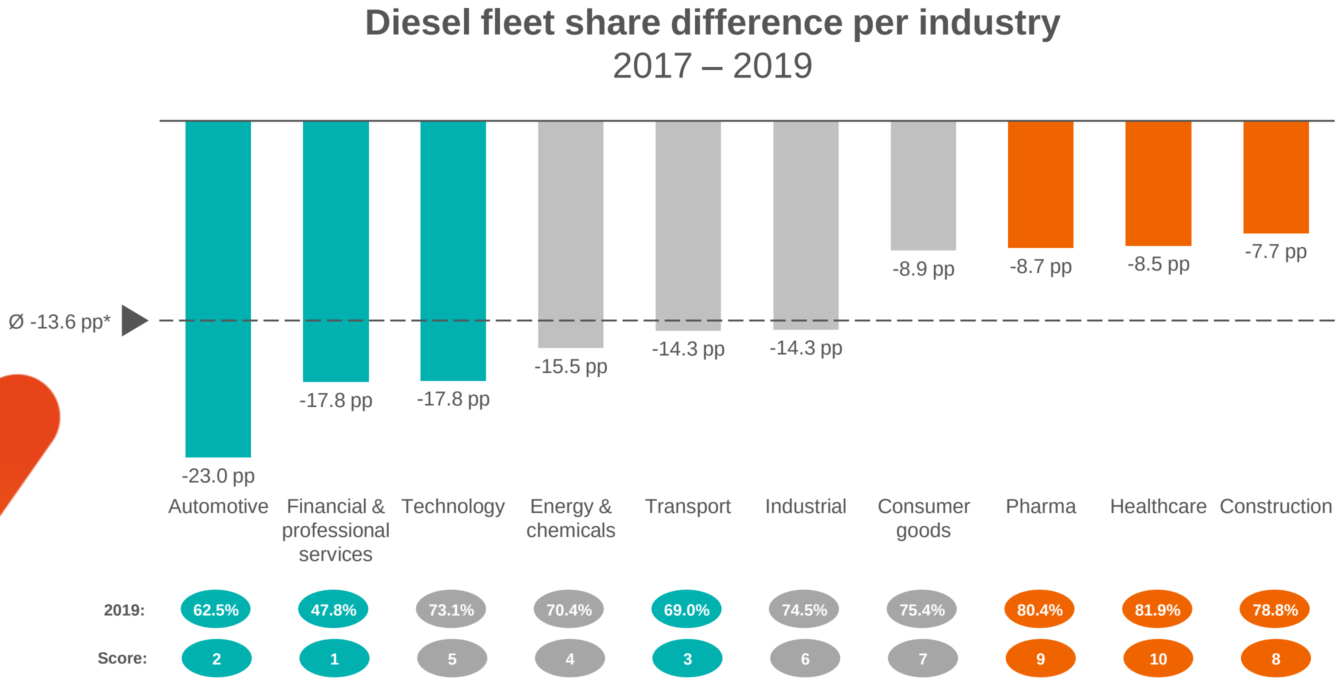
	Lowest Diesel share	Highest BEV share	Highest Hybrid share	Lowest AVG CO_2 emissions	Total score*
Financial & Professional Services	1	1	10	1	13
Energy & Chemicals	4	2	4	3	13
Technology	5	3	2	4	14
Industrial	6	4	1	6	17
Transport	3	5	8	7	23
Construction	8	10	5	2	25
Consumer Goods	7	6	7	5	25
Automotive	2	8	6	9	25
Pharma	9	9	3	8	29
Healthcare	10	7	9	10	36

- The Financial & Professional Services (F&PS) industry has taken the top spot despite having the same score as the Energy & Chemicals (E&C) industry because it holds three out of the four number-one spots.
- The Construction, Consumer Goods and Automotive industries all have the same score. However, the CO_2 score is regarded as the most important metric which is why the Construction industry is ranked in sixth place.

* For an explanation of scoring methodology, please see Annex B:The Fleet Sustainability Ranking score explained

Automotive industry achieves the biggest decrease in diesel share

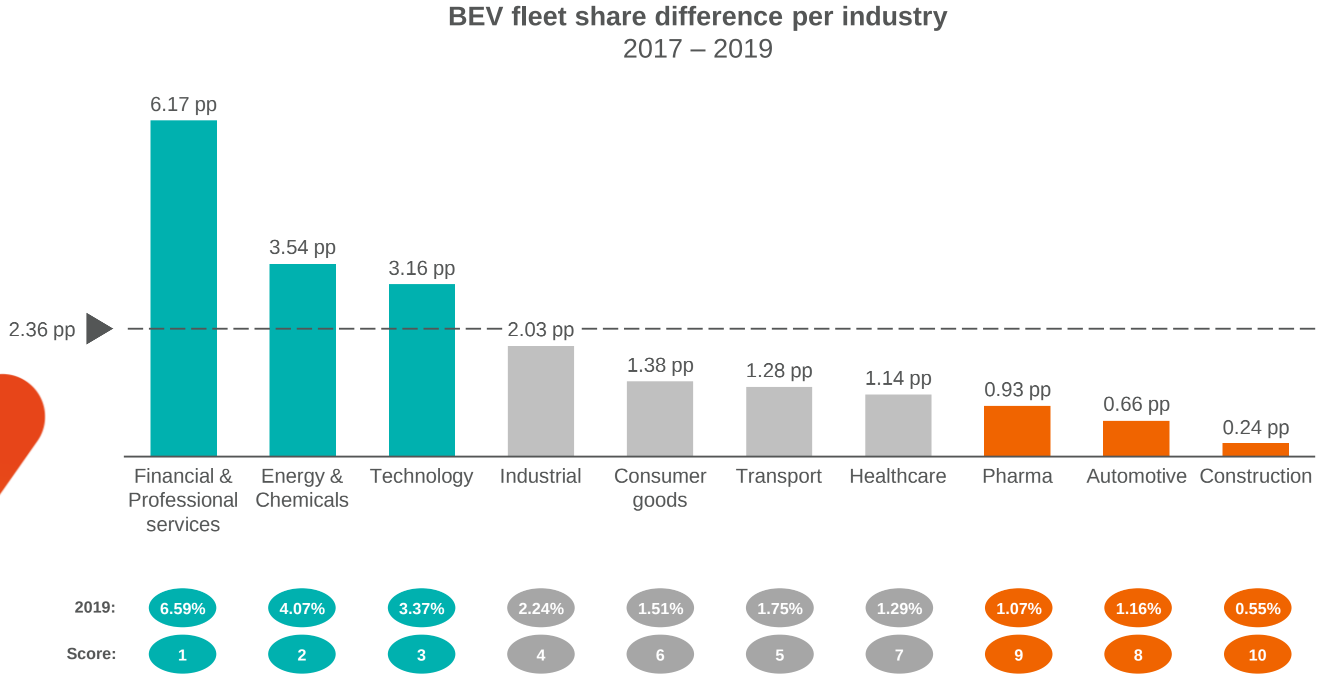
- All industries have continued to decrease their diesel share over the past two years, but there are significant variations in pace.
- The Automotive industry has achieved the largest decline in diesel share, but F&PS still has the lowest share with less than 50%.
- Whilst still having a large share of diesel, the Technology industry is now catching up, decreasing its diesel share almost as fast as the F&PS industry.



* pp = percentage point, i.e. the difference between two percentages. E.g Automotive had a diesel share of 62,5% in 2019 which is 23 pp or 26% lower than 2017 values

BEV share has increased as much as tenfold in the past 2 years

- Adoption of battery electric vehicles has really taken off in the last two years with a tenfold increase in some industries.
- Leading this trend is the F&PS industry, where BEVs accounted for one in every 15 vehicles ordered in 2019.
- At the other end of the spectrum is the Construction industry, which is still in an early BEV adoption phase (less than 1% BEVs)



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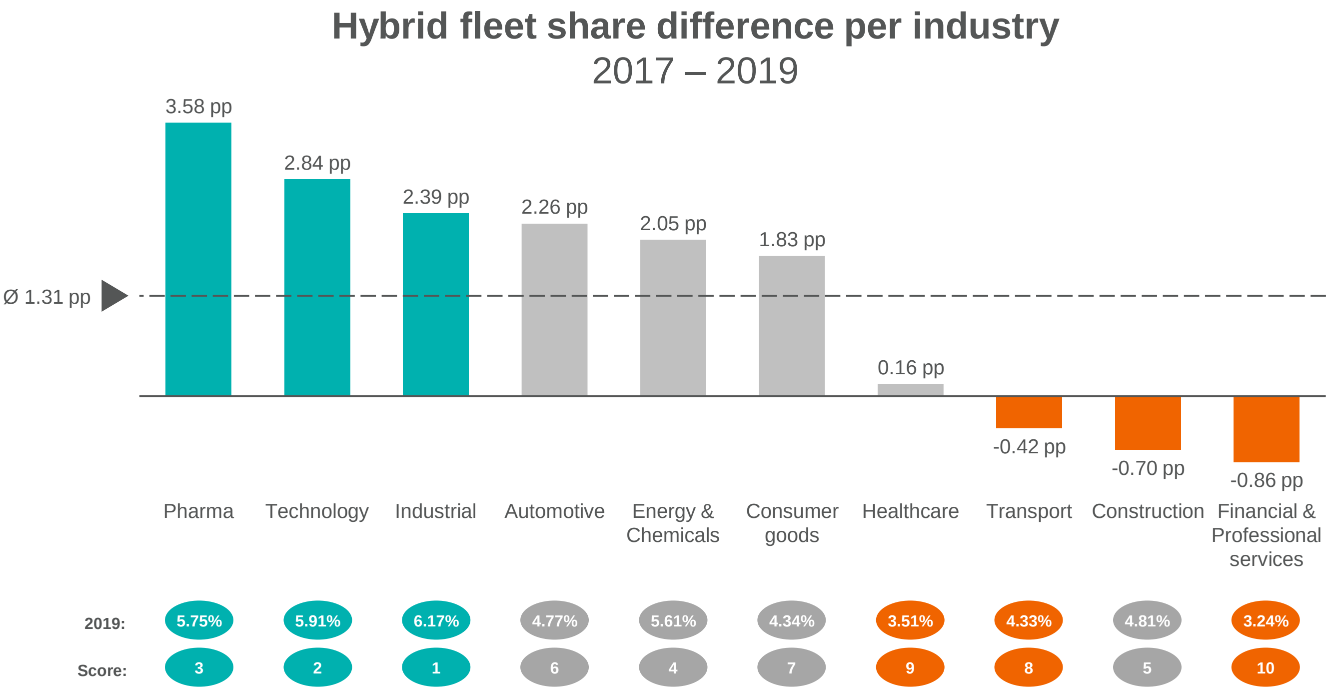
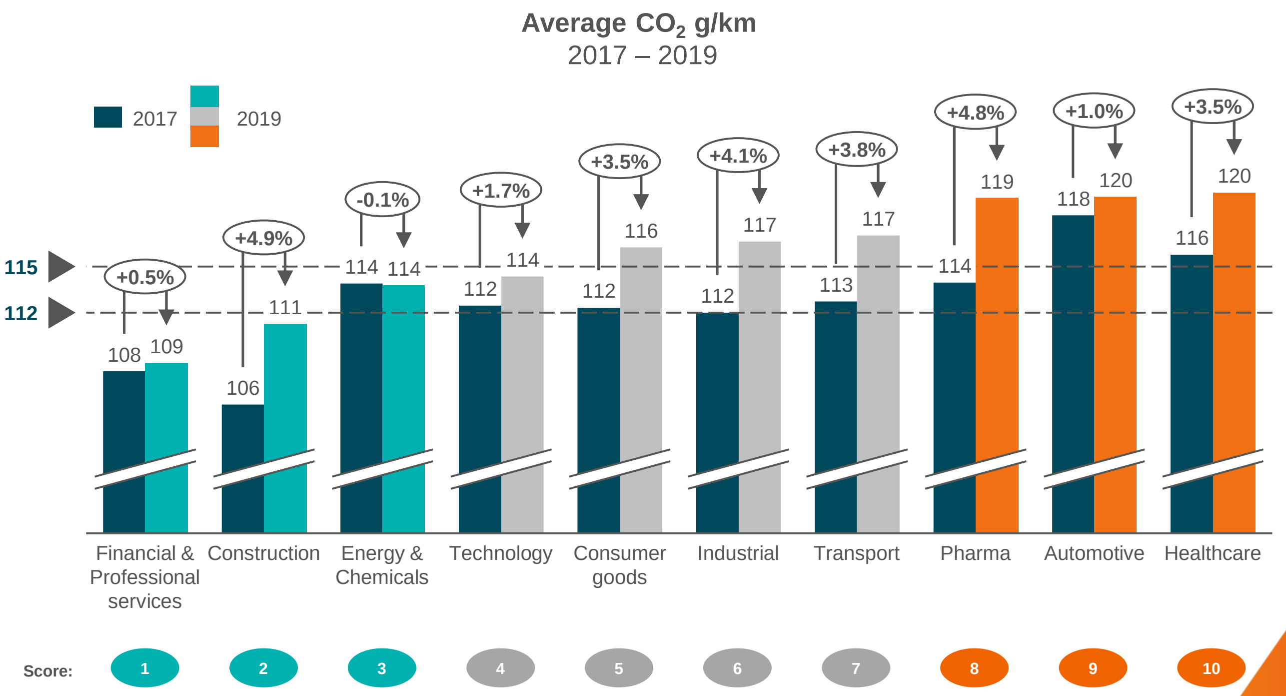
Energy & Chemicals and Technology industries lead PHEV adoption



- These figures include both plugin hybrid electric vehicles (PHEVs) and mild hybrid vehicles.
- PHEVs have been very popular in the past due to government subsidies but these have since been stopped in some countries.
- Overall, the average hybrid vehicle has a better impact on sustainability than a regular petrol/diesel vehicle.

The introduction of WLTP in 2018 has increased CO_2 levels



- The rise in the average CO_2 level is mainly caused by the transition to WLTP, the increased popularity of SUVs and the increased popularity of petrol vehicles.
- E&C is the only industry with lower CO_2 levels due to a relatively high share of diesels being replaced by either BEVs or hybrids.
- The increase in the Construction industry is remarkably high. This is mainly caused by a relatively large share of small vehicles.

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Appendix

Annex A: Definition of industries

Automotive: Companies operating in the vehicle-development supply chain including OEMs and aftermarket companies (no rental companies)

Construction: Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure-development supply chain

Consumer Goods: Companies developing or selling consumer products (FMCGs, retailers, etc)

Energy & Chemicals: Companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals

Financial & Professional Services: Companies offering financial products (banks, insurers, etc) or professional services (accountancy and consultancy)

Healthcare: Companies developing, selling or buying healthcare products (apart from pharmaceutical drugs)

Industrial: Companies producing or maintaining physical material or products for the B2B sector

Pharma: Companies that research, develop, produce or market pharmaceutical drugs for use as medications to be administered/self-administered to/by patients, with the aim to cure them, vaccinate them or alleviate their symptoms

Technology: Companies primarily involved in the development of hardware or software products

Transport: Companies involved in transport of goods or people (aviation, parcel delivery, public transport, etc)

Annex B: The Fleet Sustainability Ranking score explained

Category	Weighting	Best score** among industries
Lowest share of diesel vehicles	25%	1
Highest share of BEVs	25%	1
Highest share of plug-in & mild hybrids	25%	1
Lowest average CO_2 emissions	25% *	1

*in case of equal scores, the level of CO_2 prevails
** Best total score = 4

LeasePlan

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