



Fleet Sustainability Ranking by Industry May 2023

A comprehensive analysis of the industry
adoption of sustainable passenger car fleet
across 22 European countries



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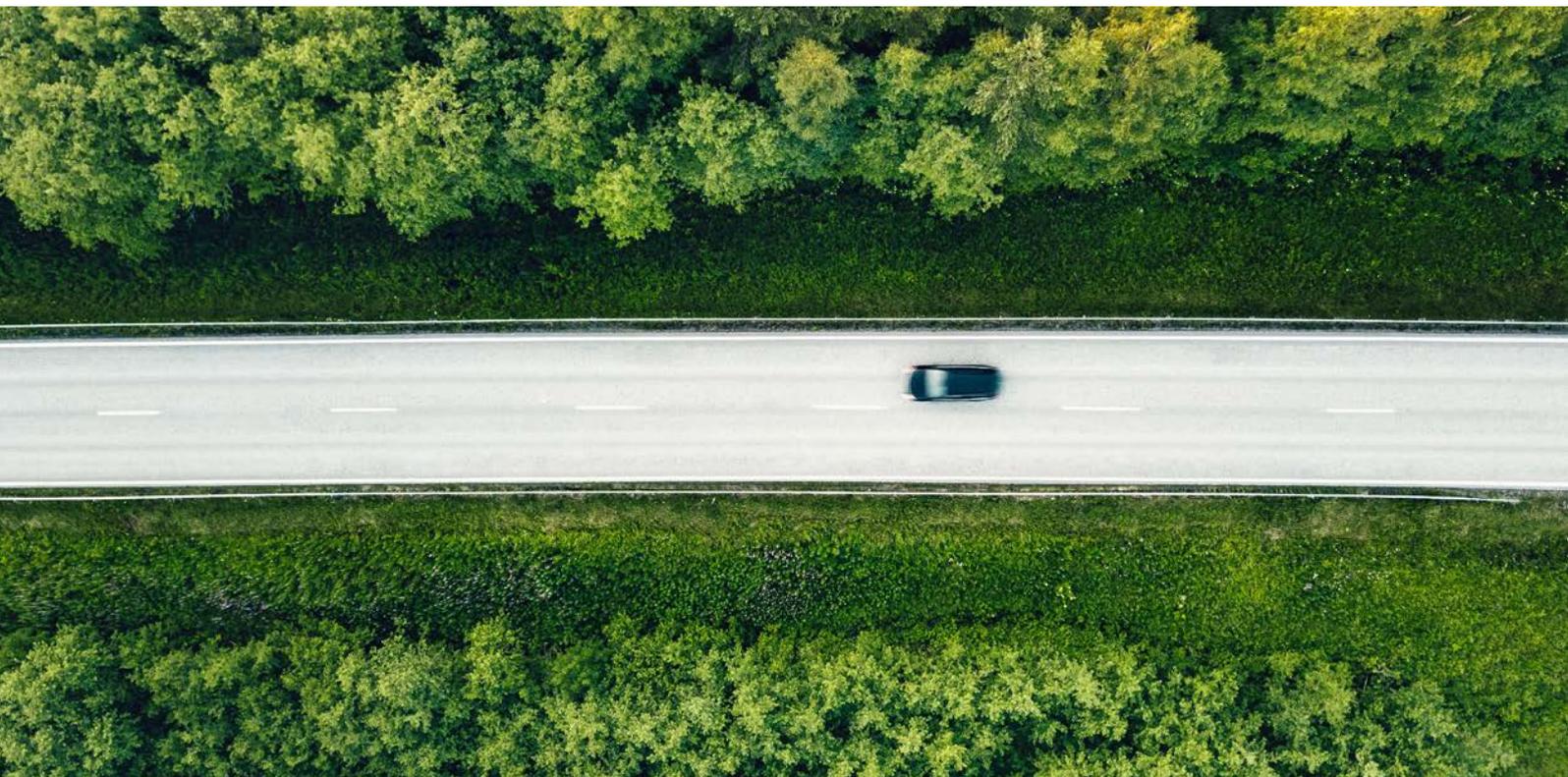
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Context

Why now?

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 organizations. 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 lower their overall emissions footprint and to help tackle climate change. It can be done with the stroke of a pen: no change of strategy is required.

About the 2023 Fleet Sustainability Ranking

LeasePlan's Fleet Sustainability Ranking by Industry is a comprehensive analysis of the differences in the rate of sustainable adoption between 8 industries across 22 European countries. The 2023 ranking is the 6th 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 average grams of CO₂ emissions per km.

The study covers all passenger cars leased from LeasePlan by companies operating an international passenger car fleet (excluding vans and trucks). To ensure that the data is representative for each country included, for each industry a total of at least 500 vehicles must be leased by at least 10 different companies.

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

* For a definition of all eight industries, please see [Appendix A: definition of industries](#)

Results 2023



Key findings



The three industries leading the charge towards zero emissions are: **Technology, Financial & Professional Services** and **Energy & Chemicals**. These industries score consistently high on all four of the fleet ranking criteria.



The **Technology** industry has emerged as the best performer for the third year in a row, due to a place in the top-3 in each of the four categories.



Battery electric vehicles (BEV) share is still growing significantly, more than doubling in each industry, while the growth in the plug-in hybrid vehicles (PHEV)/hybrid share is flattening in most industries.



Thanks to the large-scale replacement of diesel for BEV, PHEV and hybrid, now all industries were able to achieve **an average CO₂ close to or below 100 grams per km**.

Ranking overview

	Lowest diesel share	Highest BEV share	Highest PHEV/ hybrid share	Lowest AVG CO ₂ emissions	Total score
Technology	1	2	2	1	6
Financial & Professional Services	3	3	5	3	14
Energy & Chemicals	5	1	7	2	15
Industrial	6	5	4	4	19
Automotive	2	7	3	8	20
Consumer Goods	4	8	1	7	20
Construction	7	4	8	5	24
Healthcare & Pharma	8	6	6	6	26

● best-performing industries ● average performing industries ● lower-performing industries

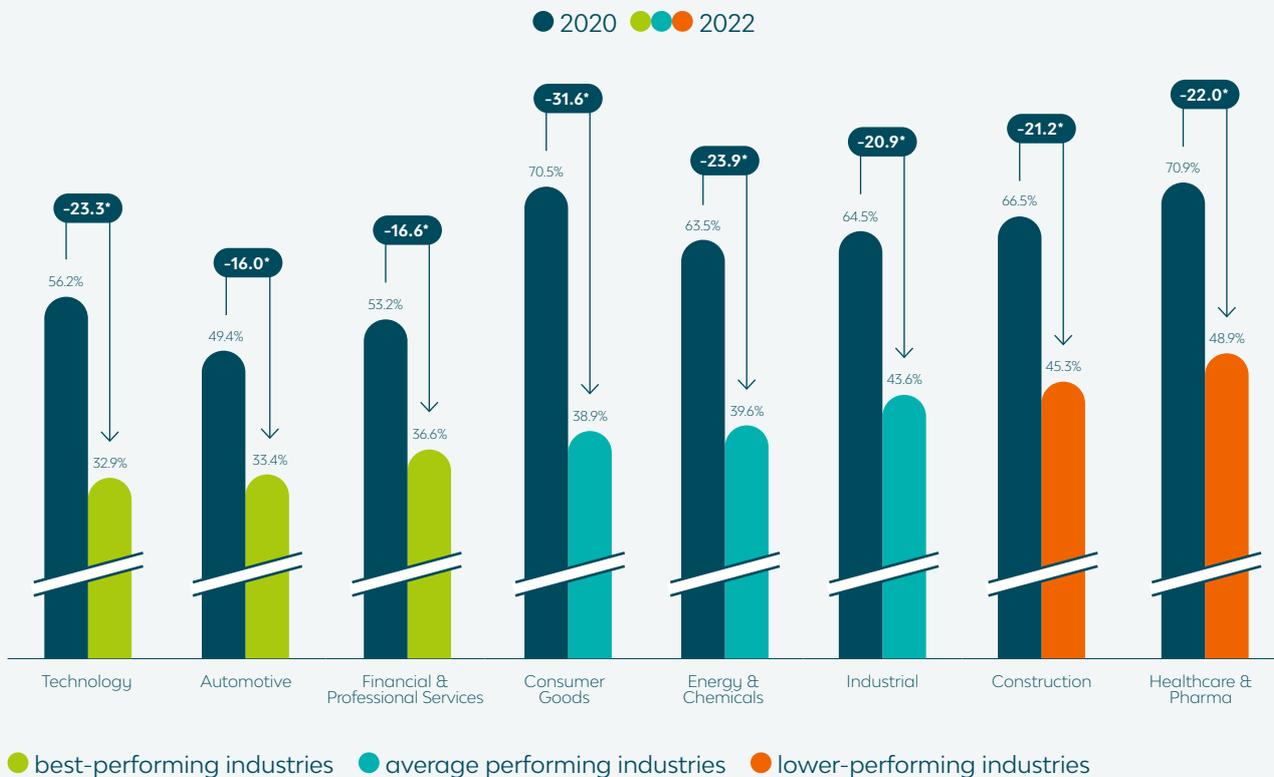
The Technology industry has taken the top spot by performing well on all four factors.

The Financial & Professional Services and Energy & Chemical industry are runners-up, losing their first place position due to their low PHEV/hybrid score.

The Healthcare & Pharma industry is the least sustainable industry, which is primarily caused by its high share of diesel cars.

The Technology industry has the lowest share of diesel, and the Consumer Goods industry almost halved their diesel share in 2 years

Diesel fleet share difference per industry, 2020-2022



With 32.9% of diesel passenger cars, the **Technology industry has the lowest share of diesel vehicles.**

All industries reduced their share of diesel by about 20% in two years' time.

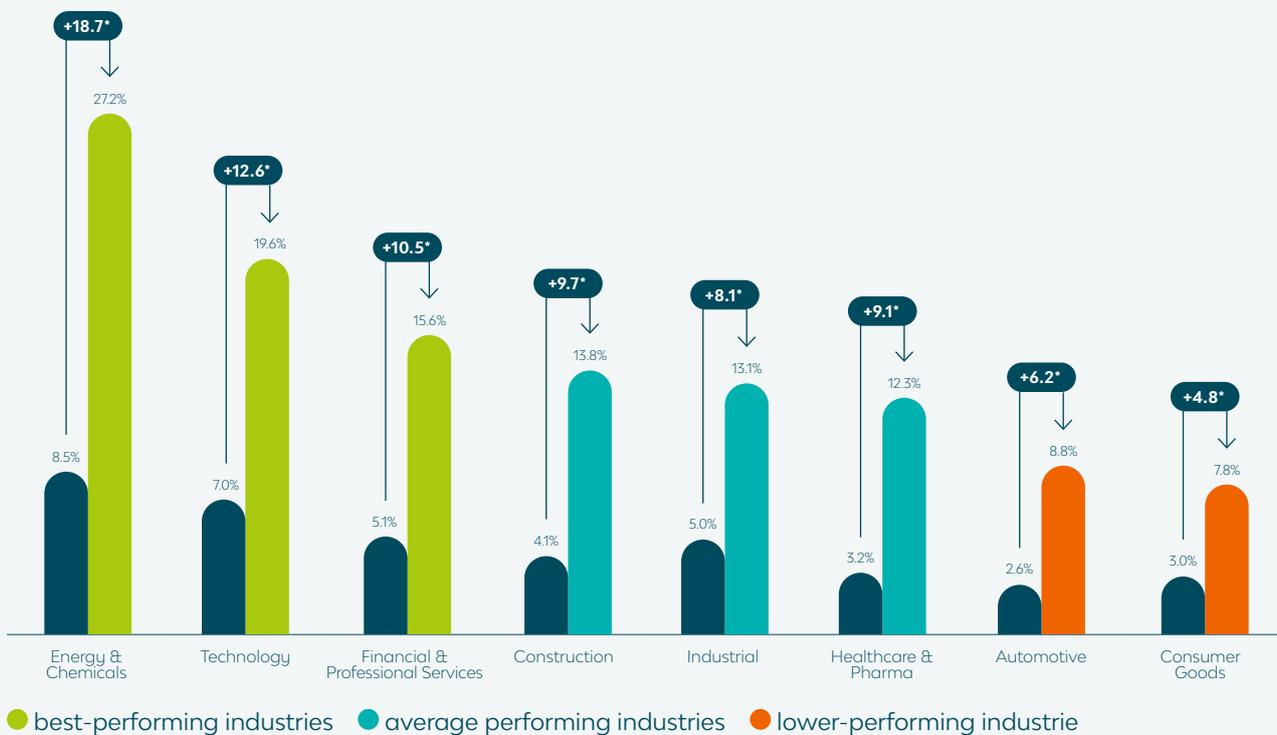
The Consumer Goods industry was able to lower its diesel share the most with 31.6 p.p., moving it up from 9th place in 2020 to 4th in 2022.

*Percentage points, the difference between two percentages. For example: the technology industry has decreased its diesel share from 56.2% to 32.9% so it has been lowered by 23.3 percentage points

One in four cars is now a BEV in the Energy & Chemicals industry

BEV fleet share difference per industry, 2020-2022

● 2020 ● 2022



The **adoption of battery electric vehicles has accelerated** in the last two years.

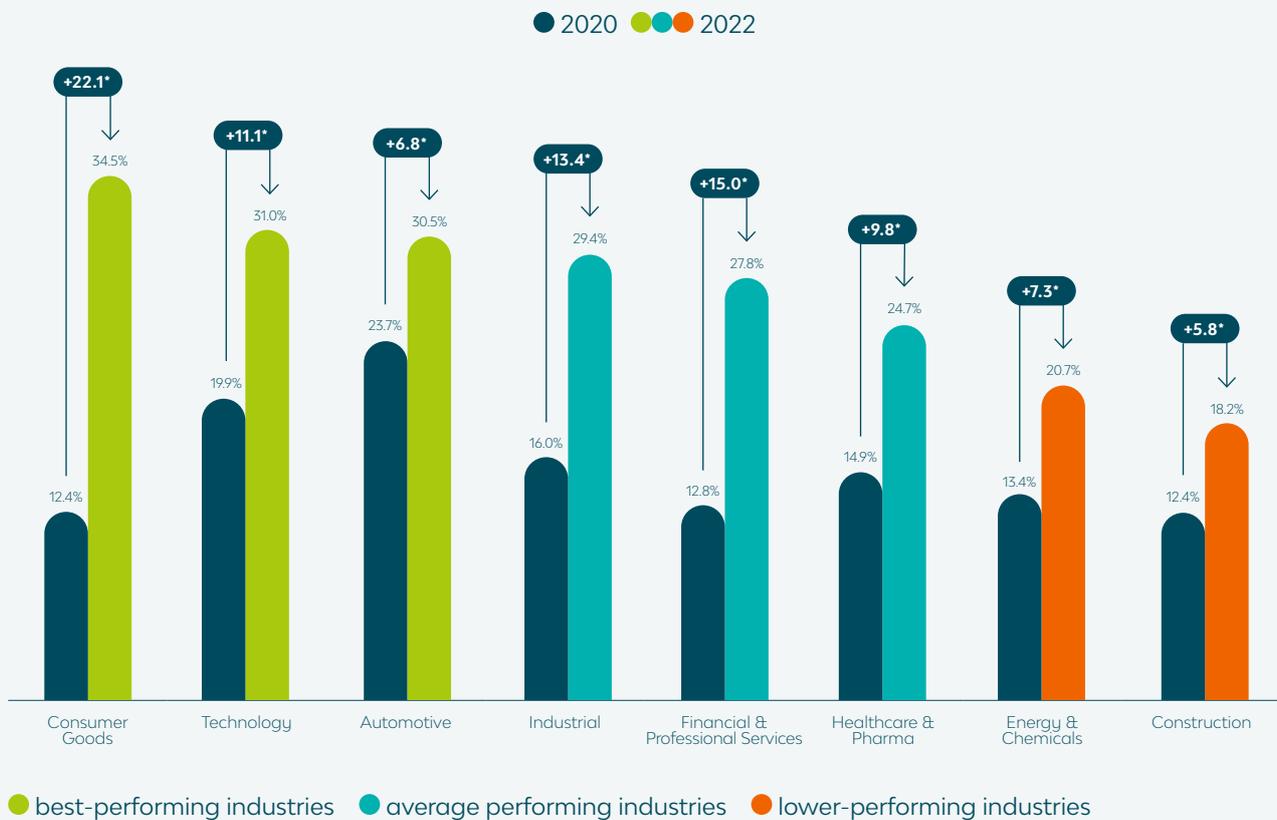
Leading this trend is the Energy & Chemical industry with 27.2% of renewals being a BEV.

Even in the industry with the lowest share of BEV, the **Consumer Goods industry, the share of BEV has more than doubled in two years.**

* Percentage points, the difference between two percentages. For example: the F&PS industry has increased its BEV share from 5.1% to 15.6% so it has increased by 10.5 percentage points

In the Consumer Goods industry, now one in three vehicles is either a PHEV or hybrid

PHEV & hybrid fleet share difference per industry, 2020-2022



The **share of PHEV & hybrids is still growing in all industries**, but it is stabilizing in some industries.

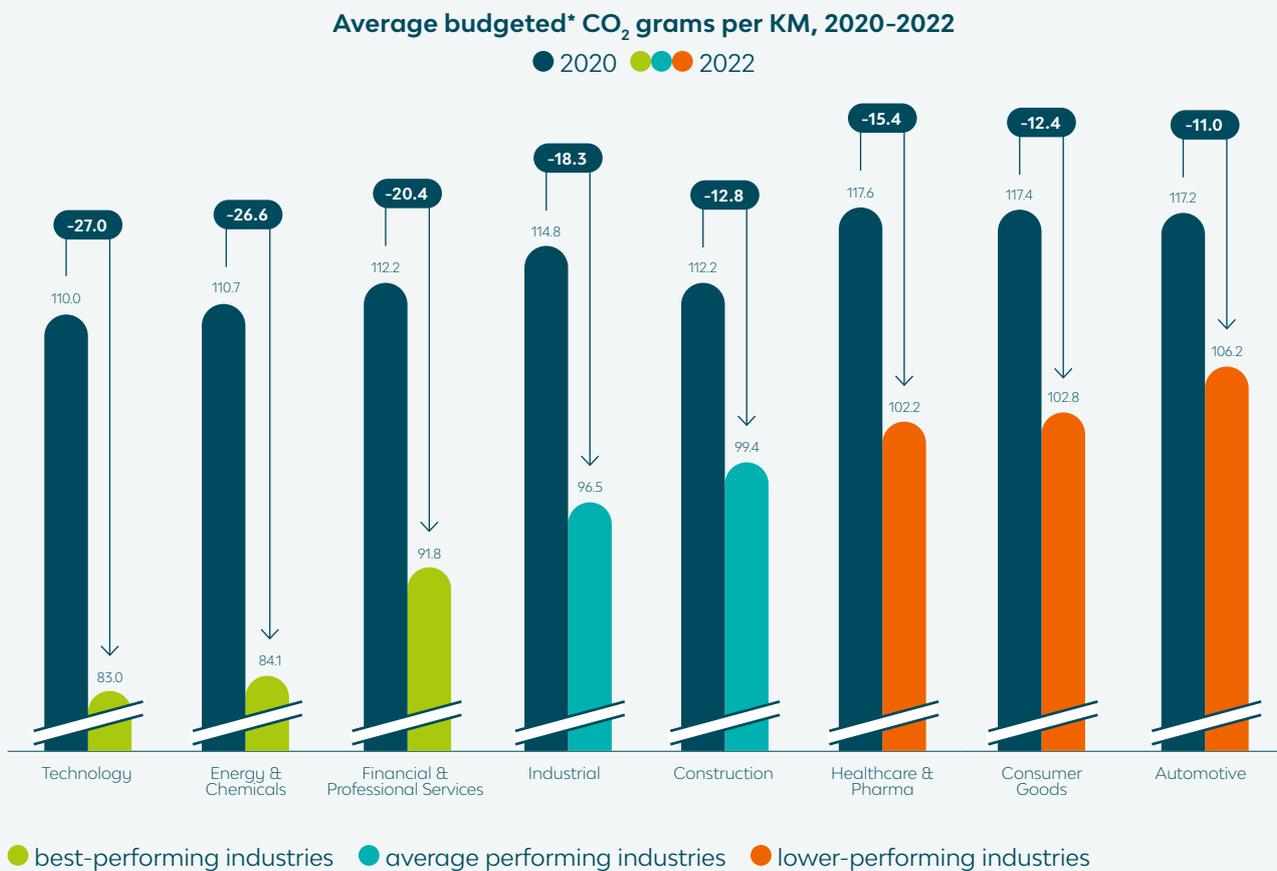
The **Consumer Goods industry is leading the trend** with 34.5% share of vehicles being either PHEV or hybrid.

Due to announced regulatory changes (EURO 7**), the average theoretical CO₂ of PHEVs will increase, and it will likely reduce the popularity of this fuel type over the next years.

* Percentage points, the difference between two percentages. For example: the industrial industry has increased its PHEV/hybrid share from 16.0% to 29.4% so it has increased by 13.4 percentage points

** For more information on the impact of EURO 7, please read our blog [here](#)

The large-scale adoption of BEVs and hybrids has lowered CO₂ levels significantly



The increase in low and zero emitting vehicles has resulted in a **lower average CO₂ in all industries.**

The **Technology industry** has achieved both **the lowest average CO₂ and the largest decrease** compared to 2020.

The **Automotive industry** shows both the **highest CO₂ and the lowest reduction** compared to 2020.

*Based on the car manufacturer WLTP (OEM) CO₂

What's next?

Interested in a more in-depth fleet study of your industry, market by market?

Visit our website to download the benchmarks per industry.

[View your industry report](#)



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What's next?

Appendix 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 & Pharma	Companies developing, selling or buying healthcare products (including pharmaceutical drugs).
Industrial	Companies producing or maintaining physical material or products for the B2B sector.
Technology	Companies primarily involved in the development of hardware or software products.