



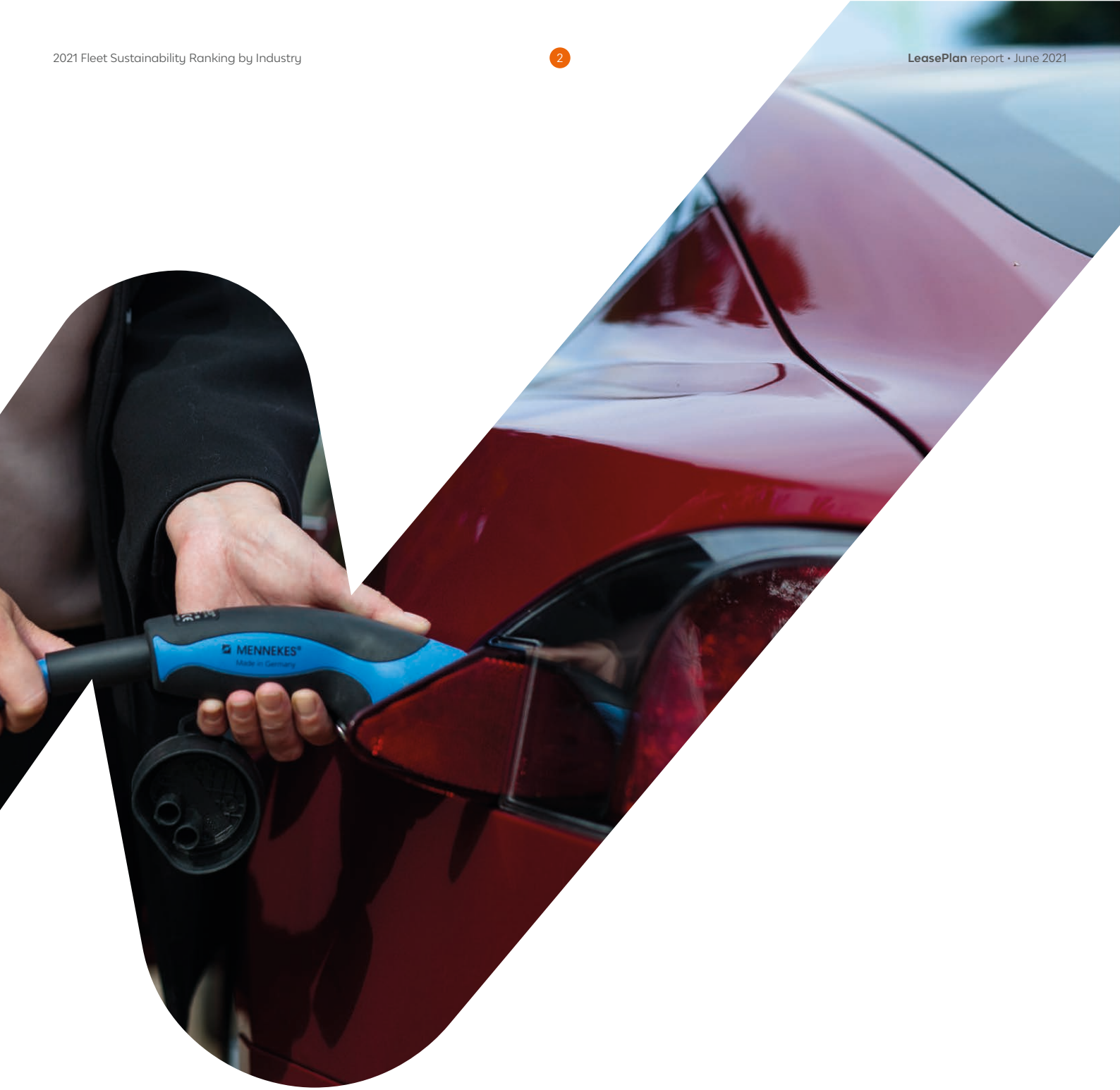
LeasePlan

What's next?

# 2021 Fleet Sustainability Ranking by Industry

Ranking 9 industries across  
24 European countries on  
their sustainability

LeasePlan International Consultancy Services • June 2021



## Contents

Context	3
About the 2021 Fleet Sustainability Ranking	4
Key findings	5
What's next	11
Appendix A: definition of industries	12



## 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 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 reduce their overall emission footprint and to help tackle climate change. It can be done with very little effort and it doesn't require a change of strategy.



## About the 2021 Fleet Sustainability Ranking

**LeasePlan's Fleet Sustainability Ranking by Industry is an annual comprehensive analysis of the differences in the rate of sustainable adoption between 9 industries across 24 European countries. The 2021 Ranking is the 4th 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<sub>2</sub> 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 in scope a total of at least 500 vehicles must be leased by at least 10 different companies.

The 9 industries included in the research are: automotive, construction, consumer goods, energy & chemicals, financial & professional services, healthcare, industrial, pharma and technology\*.

## The Fleet Sustainability Ranking is determined using four key factors across 9 industries

Category	Weighting**
Lowest share of diesel vehicles	25%
Highest share of BEVs	25%
Highest share of plug-in & mild hybrids	25%
Lowest average CO <sub>2</sub> emissions	25%

\* For a definition of all 9 industries, please refer to [appendix A: definition of industries](#)

\*\* In case of equal scores, the level of CO<sub>2</sub> prevails





## Key findings

### Fleet Sustainability Ranking 2021



The three industries showing the most willingness to change their fleet composition and work towards low average fleet CO<sub>2</sub> emissions are the technology, energy & chemicals and financial & professional services. These industries score consistently high on all fleet ranking criteria.



The technology industry has emerged as the best performer. The industry shows a strong decline in diesel, a large share of BEVs and the highest share of hybrids out of all industries.



The BEV trend continues, however, we see a resurgence of hybrids across all industries. There has been a renewed push for hybrid vehicles due to the CO<sub>2</sub> thresholds set by the European Union for car manufacturers in 2020.



There's a decrease in CO<sub>2</sub> across almost all industries. This is due to the increase in BEVs and hybrids.

\* This is also due to the transition from NEDC to WLTP CO<sub>2</sub> values being reported with higher values compared to previous years



## 2021 Fleet Sustainability Ranking by Industry

	Lowest diesel share	Highest BEV share	Highest hybrid share	Lowest AVG CO <sub>2</sub> emissions	Total score
Technology	2	3	1	4	10
Energy & chemicals	3	1	7	1	12
Financial & professional services	1	2	9	2	14
Industrial	6	4	2	5	17
Construction	5	7	4	3	19
Automotive	4	5	3	7	19
Consumer goods	7	8	6	6	27
Pharma	9	9	5	8	31
Healthcare	8	6	8	9	31

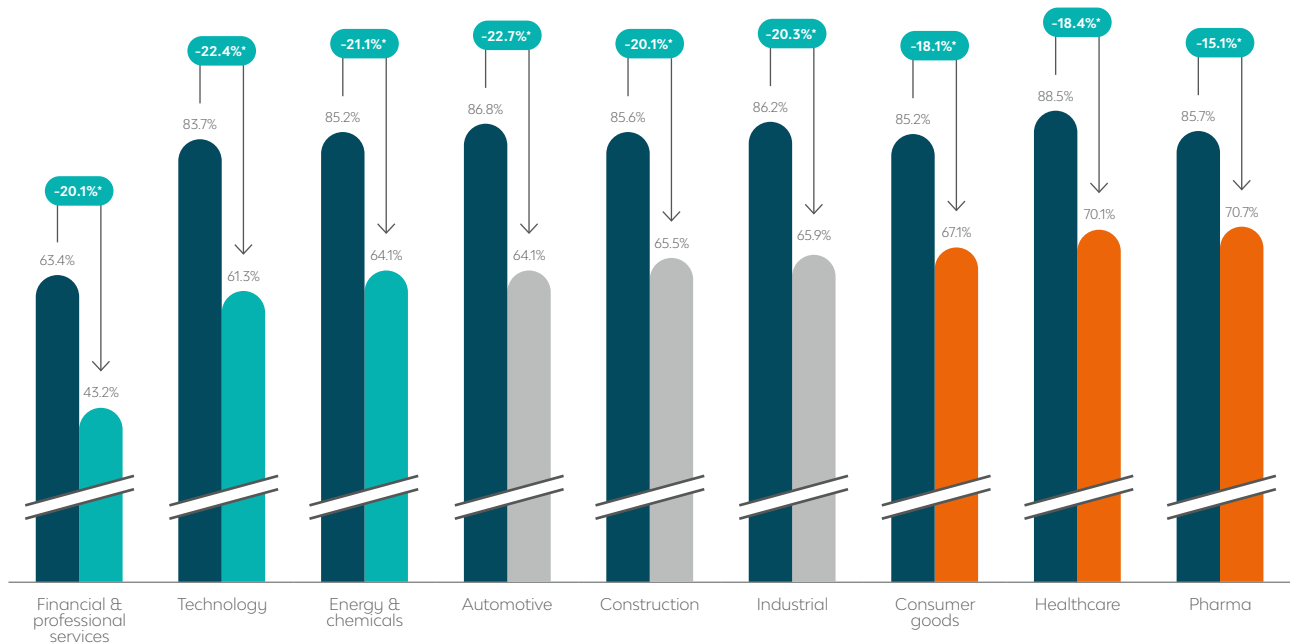
● best-performing industries ● average performing industries ● lower-performing industries

- **The technology industry has taken the top spot** by performing well on all four factors.
- While the energy & chemical industry and financial & professional services industry were close to the top spot they missed out due to their hybrid score.
- When industries have a similar overall score, like the construction and automotive industries, **the ranking for average CO<sub>2</sub> was used as deciding factor** for the overall ranking.



## The financial & professional services industry has achieved the largest decrease in diesel share and remains the industry with the lowest level

Diesel fleet share difference per industry, 2018 - 2020 ● 2018 ● 2020\*\*



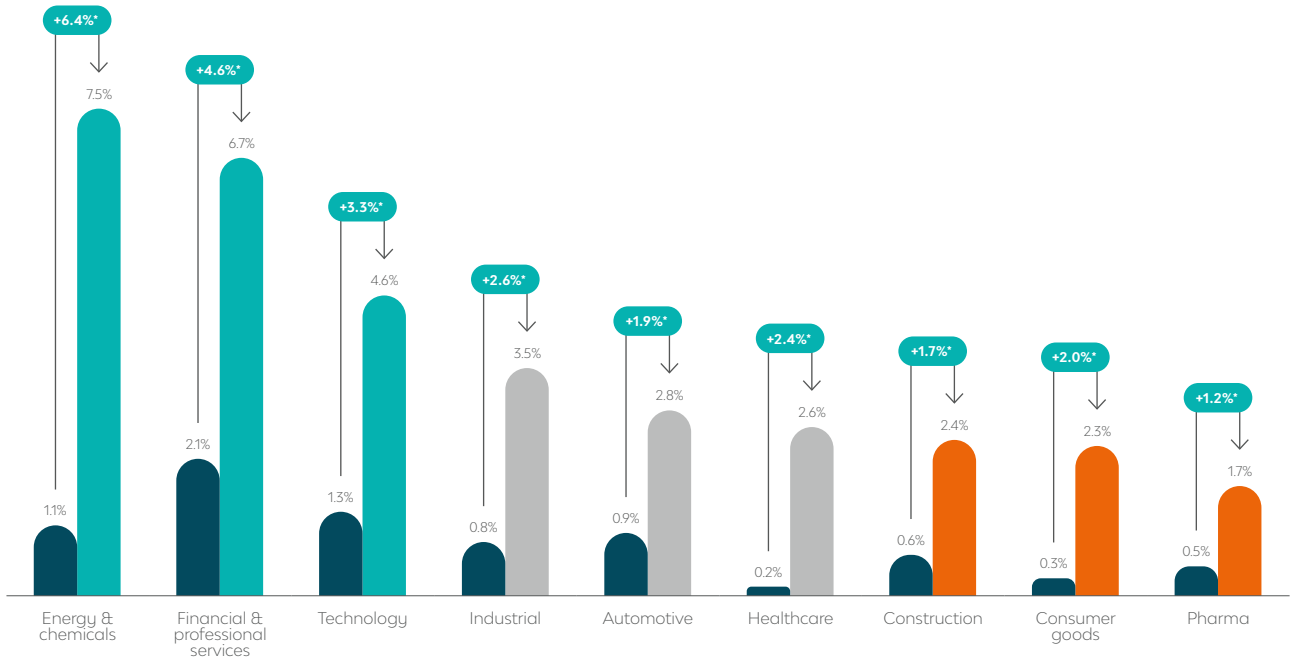
- With **43.2%** of diesel passenger cars, the financial & professional services industry (F&PS) has **the lowest share** of diesel vehicles.
- Almost all industries **reduced their share of diesel by about 20%** in two years time.
- The automotive industry was able to **lower its diesel share the most by 22.7%**, moving up from 8th place in 2018 to 4th in 2020.

\* Percentage points. This is the difference between two percentages. For example: the technology industry has decreased its diesel share from 83.9% to 61.4% so it has been lowered by 22.5 percentage points

\*\* The blue colour refers to the best-performing industries for low-emission fleets and the orange colour to the lower-performing industries

# The BEV share has increased as much as six-fold in the past 2 years

BEV fleet share difference per industry, 2018 - 2020 ● 2018 ● 2020\*\*



- The adoption of battery electric vehicles has clearly taken off in the last two years **as much as six-fold the share of BEV** in two years.
- The **energy & chemical industry is leading** this trend, having overtaken the F&PS industry to become the industry with the largest share of BEVs.
- Even in the industry with the lowest share of BEV (pharma industry), **the share of BEV has tripled.**

\* Percentage points, the difference between two percentages. For example: the F&PS industry has increased its BEV share from 2.1% to 6.7% so it has been increased by 4.6 percentage points

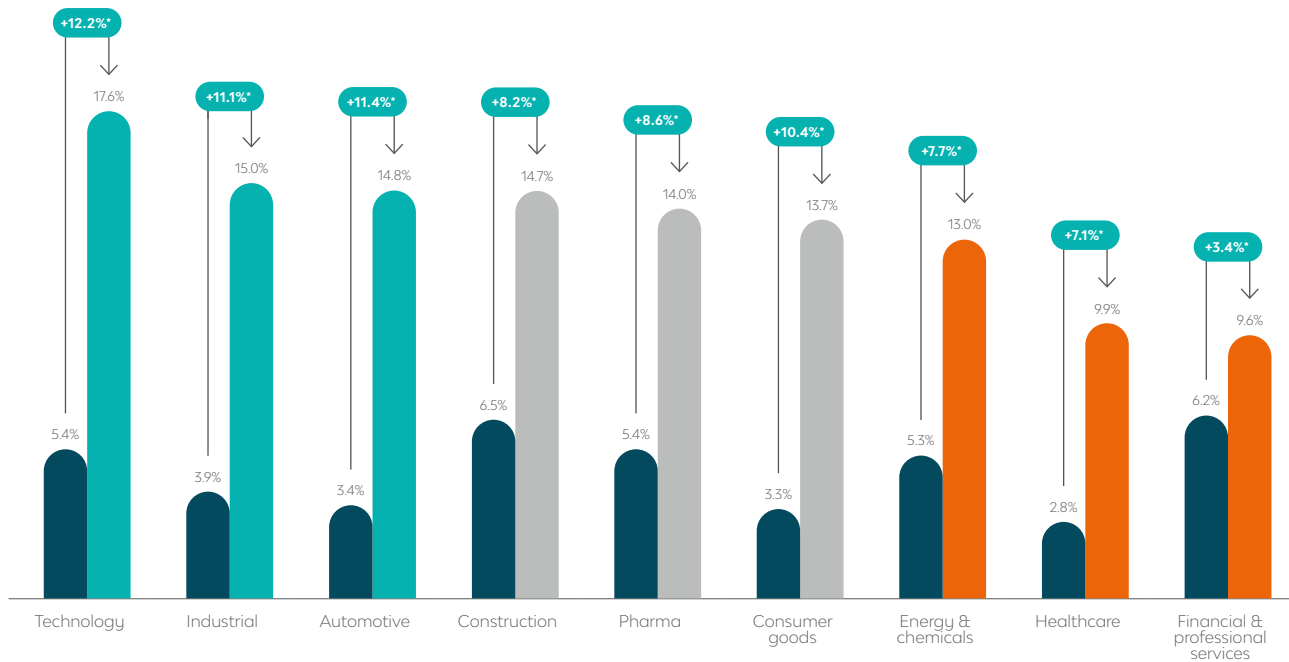
\*\* The blue colour refers to the best-performing industries for low-emission fleets and the orange colour to the lower-performing industries





## The EU CO<sub>2</sub> thresholds from 2020 have led to a resurgence of hybrids across all industries

Hybrid fleet share difference per industry, 2018 - 2020 ● 2018 ● 2020\*\*



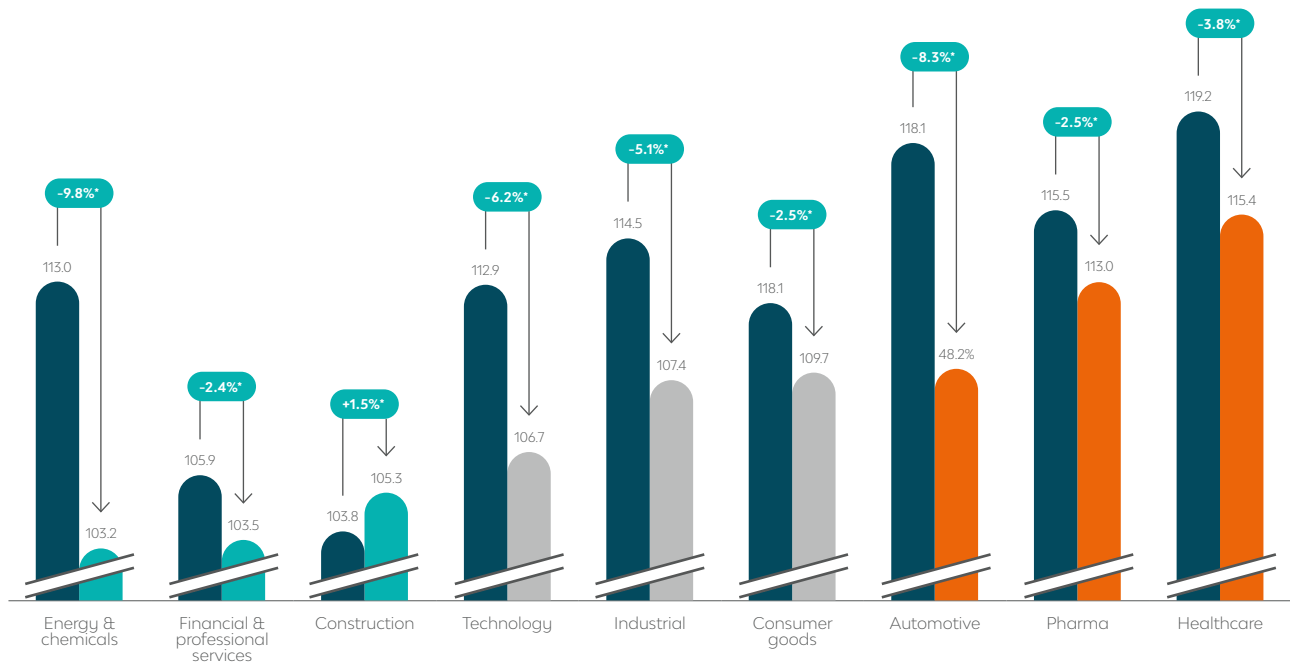
- These figures include both plugin hybrid electric vehicles (PHEVs) and mild hybrid vehicles.
- There has been a **renewed push for hybrid vehicles in all industries** due to the CO<sub>2</sub> thresholds set by the European Union for car manufacturers in 2020.
- The **technology industry is leading** the trend while the 2018 leading industry, the F&PS, has now taken the last spot.

\* Percentage points, the difference between two percentages. For example: the Industrial industry has increased its hybrid share from 3.9% to 14.8% so it has been increased by 11.0 percentage points

\*\* The blue colour refers to the best-performing industries for low-emission fleets and the orange colour to the lower-performing industries

## The large-scale adoption of BEVs and hybrids has lowered CO<sub>2</sub> levels significantly

Average CO<sub>2</sub> grams per industry, 2018 - 2020 ● 2018 ● 2020\*\*



- The **increase in BEVs and hybrids** has caused almost all industries to lower their average CO<sub>2</sub>.
- The energy & chemicals industry has achieved both the **lowest average CO<sub>2</sub>** as well as the **largest decrease** compared to 2018. This is primarily due to its large share of BEVs (7.5% in 2020).
- The only industry with an increase in average CO<sub>2</sub> is the construction industry. This is primarily caused by a broad move to larger diesel vehicles (SUVs) in 2020 compared to 2018.

\* percentages, the percentual difference between two CO<sub>2</sub> averages. For example: the E&C industry has lowered the average CO<sub>2</sub> from 114.0 to 104.1 so it has been lowered by 9.0 percentage, taking 2018 as 100%

\*\* The blue colour refers to the best-performing industries for low-emission fleets and the orange colour to the lower-performing industries



## What's next?

### Interested in a more in-depth fleet study of your industry and how it compares to other industries?

Please visit our [Consultancy benchmark services page](#) to download your industry report.

Our LeasePlan International Consultancy team can also provide you with an in-depth, tailored analysis of your fleet vs your peers and advice. For more information, please contact your LeasePlan liaison or LeasePlan Consultancy at [ics@leaseplan.com](mailto:ics@leaseplan.com).





# Appendix

## Appendix A: definition of industries

<b>Automotive</b>	Companies operating in the vehicle-development supply chain including OEMs and aftermarket companies (no rental companies).
<b>Construction</b>	Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure-development supply chain.
<b>Consumer goods</b>	Companies developing or selling consumer products (FMCGs, retailers, etc).
<b>Energy &amp; chemicals</b>	Companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals.
<b>Financial &amp; professional services</b>	Companies offering financial products (banks, insurers, etc) or professional services (accountancy and consultancy).
<b>Healthcare</b>	Companies developing, selling or buying healthcare products (apart from pharmaceutical drugs).
<b>Industrial</b>	Companies producing or maintaining physical material or products for the B2B sector.
<b>Pharma</b>	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.
<b>Technology</b>	Companies primarily involved in the development of hardware or software products.

# LeasePlan

LeasePlan Corporation N.V.  
Gustav Mahlerlaan 360  
1082 ME Amsterdam  
The Netherlands  
[info@leaseplancorp.com](mailto:info@leaseplancorp.com)

[leaseplan.com](https://leaseplan.com)