



# Fleet Sustainability Ranking by Industry **June 2022**

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



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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 report

LeasePlan's Fleet Sustainability Ranking by Industry is a comprehensive analysis of the differences in the rate of sustainable adoption between 8 industries across 24 European countries. The 2022 ranking is the 5th 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, for each country included a total of at least 500 vehicles must be leased by at least 10 different companies.

The 8 industries included in the research are: automotive, construction, consumer goods, energy & chemicals, financial & professional services, healthcare & pharma, industrial, and technology\*.

## The Fleet Sustainability Ranking by Industry is determined using 4 key factors across the 8 industries\*\*

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 <sub>2</sub> emissions	25%	1

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

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

\*\*\* Best total score = 4

# Results 2022



# Key findings



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



The technology industry has emerged as the best performer for the second year in a row, showing up on the top 3 in each of the four categories.



While the BEV share is increasing at a rapid pace, the plug-in hybrid vehicle (PHEV) / hybrid share has seen the most significant increase over the last two years. Only in the energy & chemicals industry the share of BEVs is higher than that of the PHEV / hybrids.



Overall, all industries show a decrease in average CO<sub>2</sub> emissions primarily due to the significant replacement of diesel for low and zero emitting alternatives. Among the industries in scope, the energy & chemicals have the lowest CO<sub>2</sub> due to its highest share of BEVs.

# Industry highlights

	Lowest diesel share	Highest BEV share	Highest PHEV/ hybrid share	Lowest AVG CO <sub>2</sub> emissions	Total score
Technology	3	3	3	2	11
Financial & Professional Services	1	2	6	3	12
Energy & Chemicals	4	1	7	1	13
Automotive	2	7	4	6	19
Healthcare & Pharma	5	6	2	7	20
Construction	6	4	8	4	22
Industrial	8	5	5	5	23
Consumer Goods	7	8	1	8	24

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

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

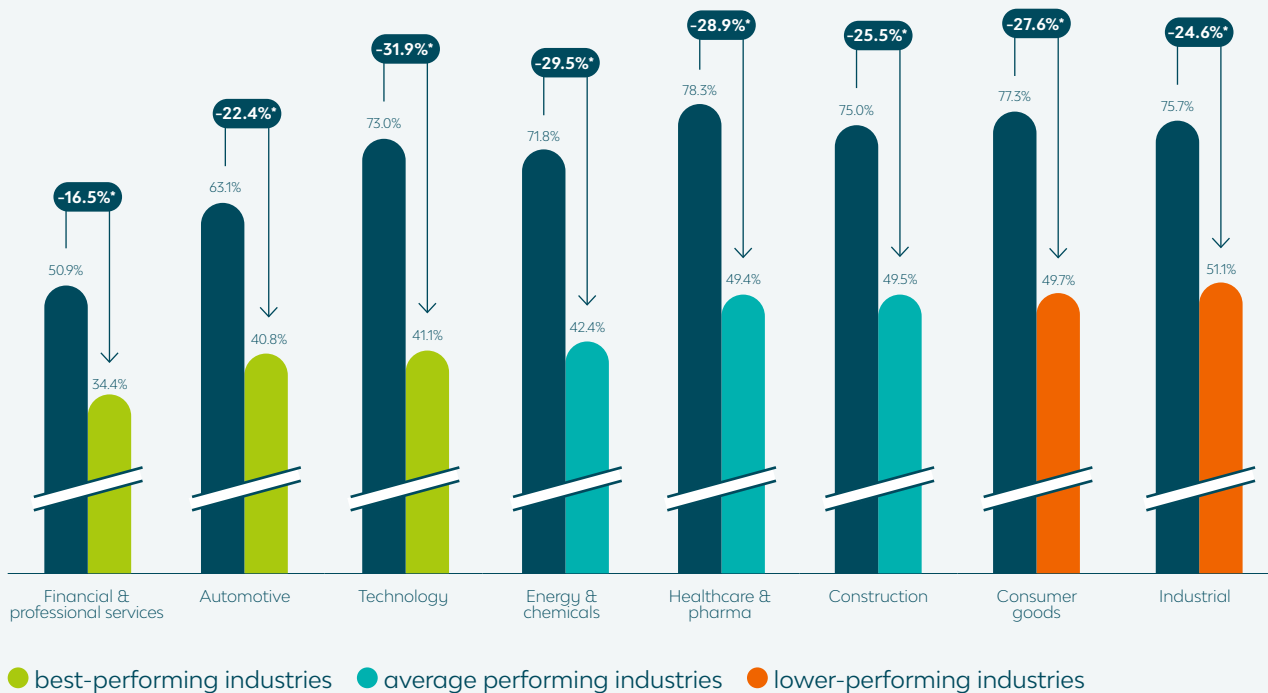
This is **followed by the energy & chemical and the financial & professional services industries** which don't take a higher spot due to their hybrid score.

**The consumer goods industry is the least sustainable industry**, scoring low on each of the four factors, except for the PHEV / hybrid share.

The financial & professional services has achieved the largest reduction and it is the industry with the lowest share of diesel

Diesel fleet share difference per industry, 2019-2021

● 2019 ● 2021



With 34.4% of diesel passenger cars, the **financial & professional services industry (F&PS) has the lowest share of diesel vehicles.**

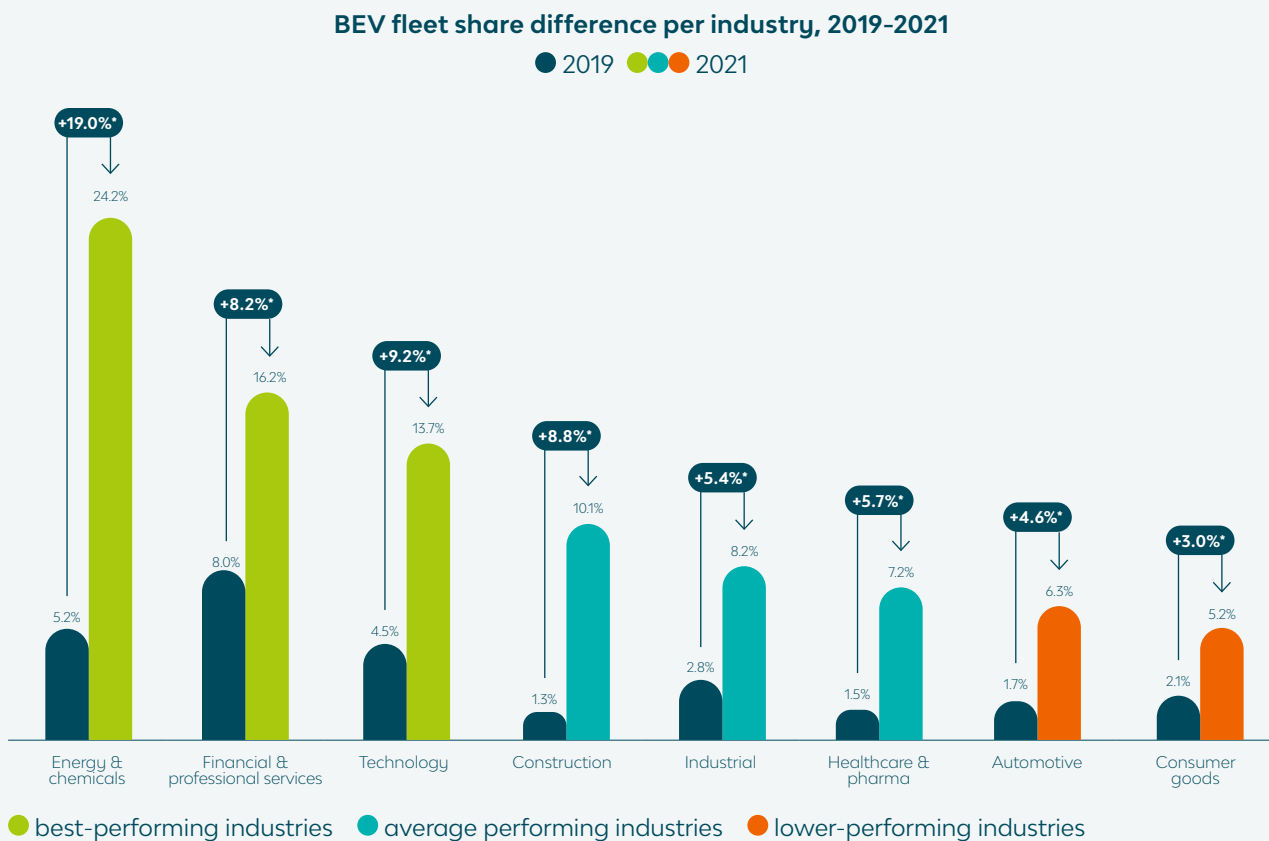
**All industries reduced their share of diesel by about 20% in two years time.**

**The technology industry was able to lower its diesel share the most with 31.9%, moving up from 4th place in 2019 to 3rd in 2021.**

\*Percentage points, the difference between two percentages. For example: the technology industry has decreased its diesel share from 73.0% to 41.1% so it has been lowered by 31.9 percentage points



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



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

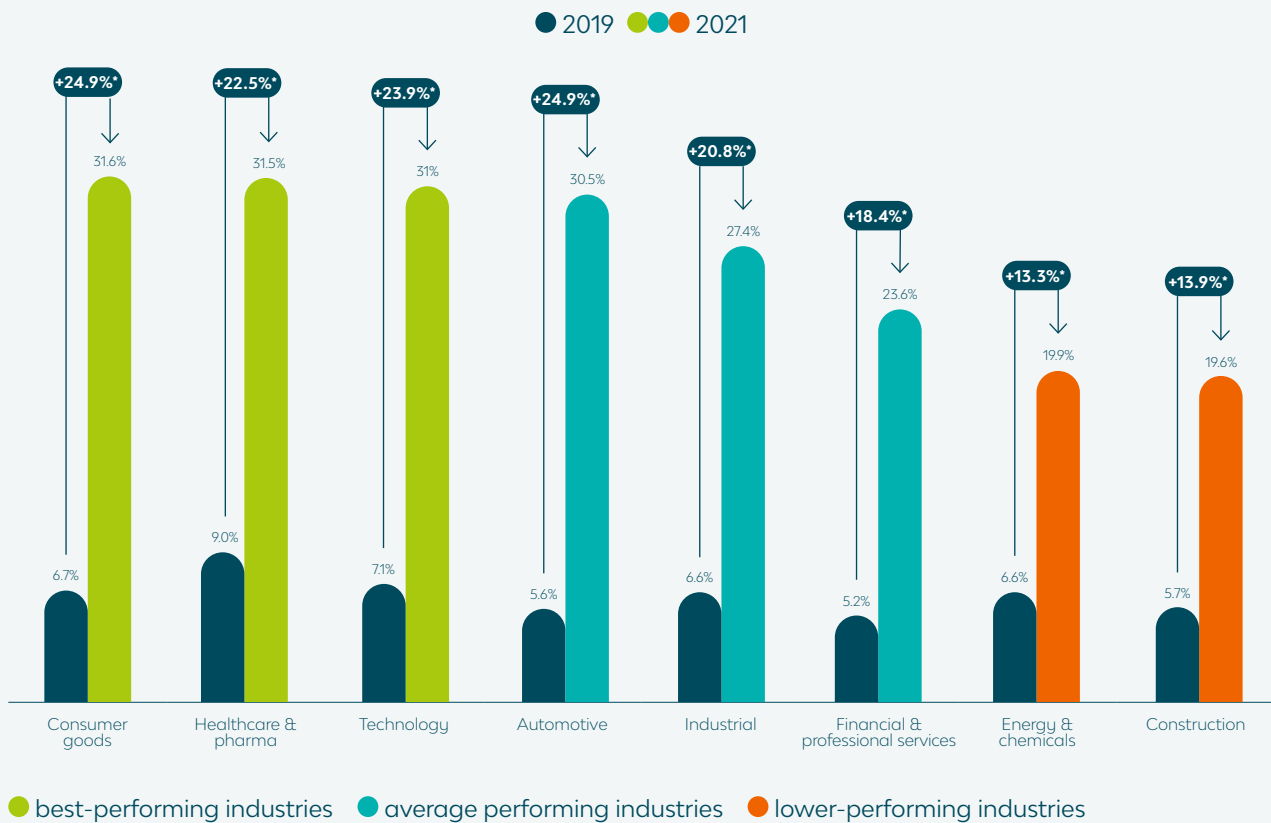
**Leading this trend is the energy & chemical industry** with 24.2% of renewals being a BEV.

Even in the industry with the lowest share of BEV, the **consumer goods industry, the share of BEV has more than doubled.**

\* Percentage points, the difference between two percentages. For example: the F&PS industry has increased its BEV share from 8.0% to 16.2% so it has increased by 8.2 percentage points

# The EU's CO<sub>2</sub> thresholds of 2021 have led to a resurgence of PHEV & hybrids across all industries

PHEV & hybrid fleet share difference per industry, 2019-2021



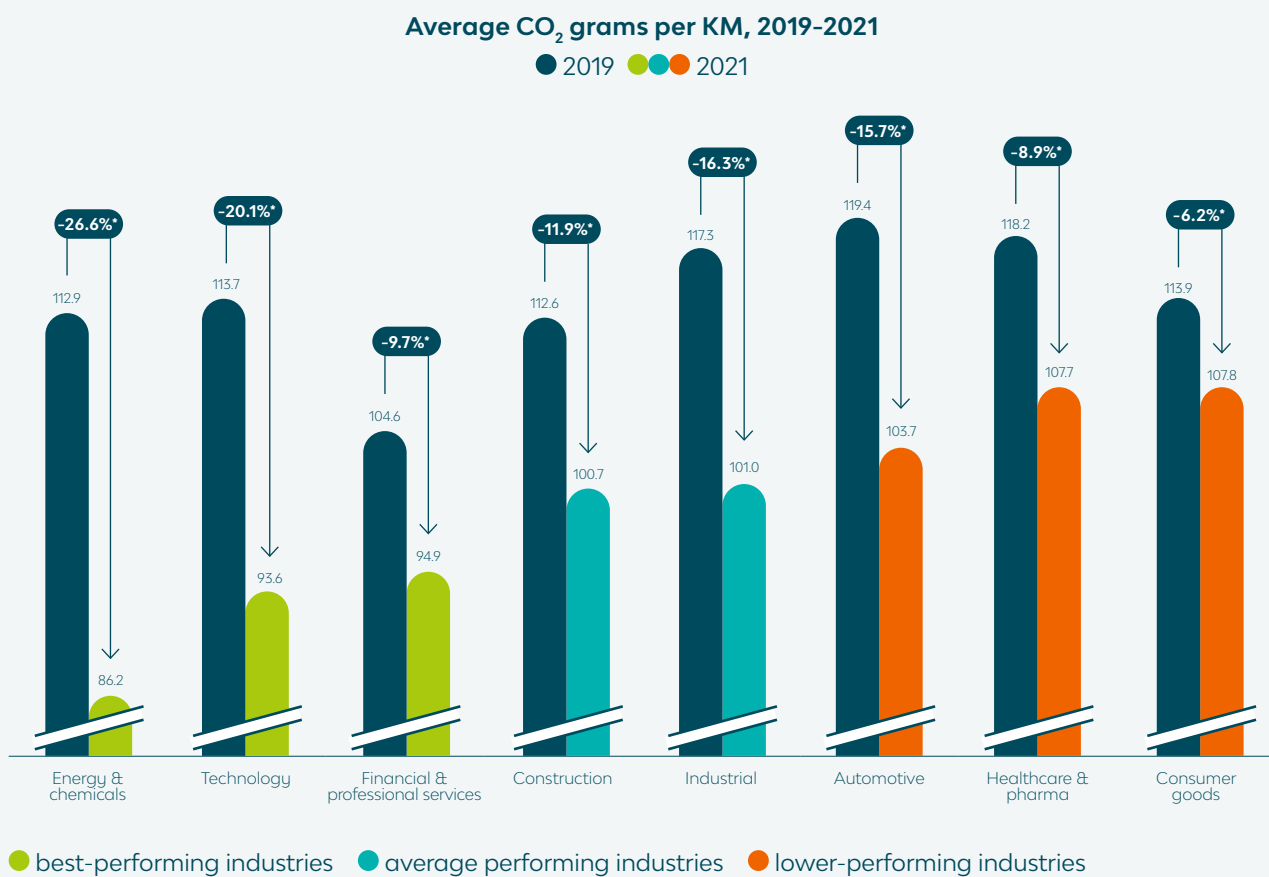
The **share of PHEV & hybrids has at least tripled** in each industry.

The **consumer goods industry is leading the trend** with 31.6% share of vehicles being either PHEV or hybrid.

Across all industries, PHEV & hybrids are regarded as solid transitory powertrains in the road to zero emissions.

\* Percentage points, the difference between two percentages. For example: the industrial industry has increased its PHEV/hybrid share from 6.6% to 27.4% so it has increased by 20.8 percentage points

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



The increase in low and zero emitting vehicles has resulted in a **lower average CO<sub>2</sub> in all industries.**

The **energy & chemicals industry** has achieved both the **lowest average CO<sub>2</sub> and the largest decrease** compared to 2019.

The **consumer goods industry** shows both the **highest CO<sub>2</sub> and the lowest reduction** compared to 2019.

\*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 112.9 to 86.2 so it has been lowered by 26.6%

# 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 advice and analysis of your fleet VS your peers. For more information, please contact your LeasePlan account manager or the LeasePlan Consultancy at [ics@leaseplan.com](mailto:ics@leaseplan.com).



## LeasePlan Corporation N.V.

Gustav Mahlerlaan 360  
1082 ME Amsterdam  
The Netherlands  
[info@leaseplancorp.com](mailto:info@leaseplancorp.com)  
[leaseplan.com](http://leaseplan.com)



What's next?

# 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 &amp; pharma</b>	Companies developing, selling or buying healthcare products (including pharmaceutical drugs).
<b>Industrial</b>	Companies producing or maintaining physical material or products for the B2B sector.
<b>Technology</b>	Companies primarily involved in the development of hardware or software products.

