

# Fleet Sustainability Ranking by Industry

An analysis of industry adoption of sustainable passenger cars in fleets across 29 European countries



Better with every move.

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# Background

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

With approximately 58% of new car sales in Europe registered to companies, corporations should play a leading role 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.

\* [https://www.who.int/teams/environment-climate-change-and-health/healthy-urban-environments/transport/health-risks#:~:text=The%20transport%20sector%20is%20the,greenhouse%20gases%20\(GHG\)%20budget.](https://www.who.int/teams/environment-climate-change-and-health/healthy-urban-environments/transport/health-risks#:~:text=The%20transport%20sector%20is%20the,greenhouse%20gases%20(GHG)%20budget.)

\*\* <https://www.eea.europa.eu/en/topics/in-depth/transport-and-mobility>

\*\*\* <https://www.fleeteurope.com/en/new-energies/europe/features/ec-under-pressure-make-all-new-company-carselectric-2030?a=JMA06&t%5B0%5D=T%26E&t%5B1%5D=Electrification&t%5B2%5D=Emissions&curl=1>



# About the rankings.

Ayvens' Fleet Sustainability Ranking by Industry is an analysis of the rate of sustainable vehicle adoption across industries in 29 European countries.

The 2024 ranking is the second report from Ayvens. The rankings are based on four factors: the share of diesel, the share of battery electric vehicles (BEVs), share of hybrids and the level of CO<sub>2</sub> emissions.

The study covers all passenger cars lease from Ayvens' clients operating an international fleet.

The industries included in the research are: Automotive, Construction, Consumer Goods, Energy & Chemical, Financial & Professional Services, Healthcare, Industrial, Pharmaceutical and Technology.

The Fleet Sustainability Ranking by Industry is determined\* using 4 key factors across the ten 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 hybrids	25%	1
Lowest average CO2 emissions	25%	1

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

\*\* Best total score = 4





# Key findings:



The financial & professional services industry has taken the top spot as the most sustainable industry for the second year in a row.



The construction industry has improved the most, decreasing the share of diesel and maintaining a high share of battery electric vehicles.



The share of petrol vehicles in fleets is increasing more than in previous years with the largest increase seen in the healthcare industry.



Average CO<sub>2</sub> emissions for new vehicles have decreased in all industries over the past two years. On average, they've decreased by 25% since 2022.

# The rankings:

Rankings	Lowest share of diesel	Highest share of BEV	Highest share of PHEV/hybrid	Lowest avg. CO <sub>2</sub> emissions	Industry score
1 <sup>st</sup> Financial & Professional Services	1	5	2	1	9
2 <sup>nd</sup> Construction	2	1	9	3	15
3 <sup>rd</sup> Energy & Chemical	3	3	6	5	17
4 <sup>th</sup> Technology	5	6	5	2	18
5 <sup>th</sup> Automotive	4	7	4	7	22
6 <sup>th</sup> Industrial	9	4	7	4	24
7 <sup>th</sup> Pharma	8	2	8	6	24
8 <sup>th</sup> Consumer goods	7	8	1	9	25
9 <sup>th</sup> Healthcare	6	9	3	8	26



Best performing industries



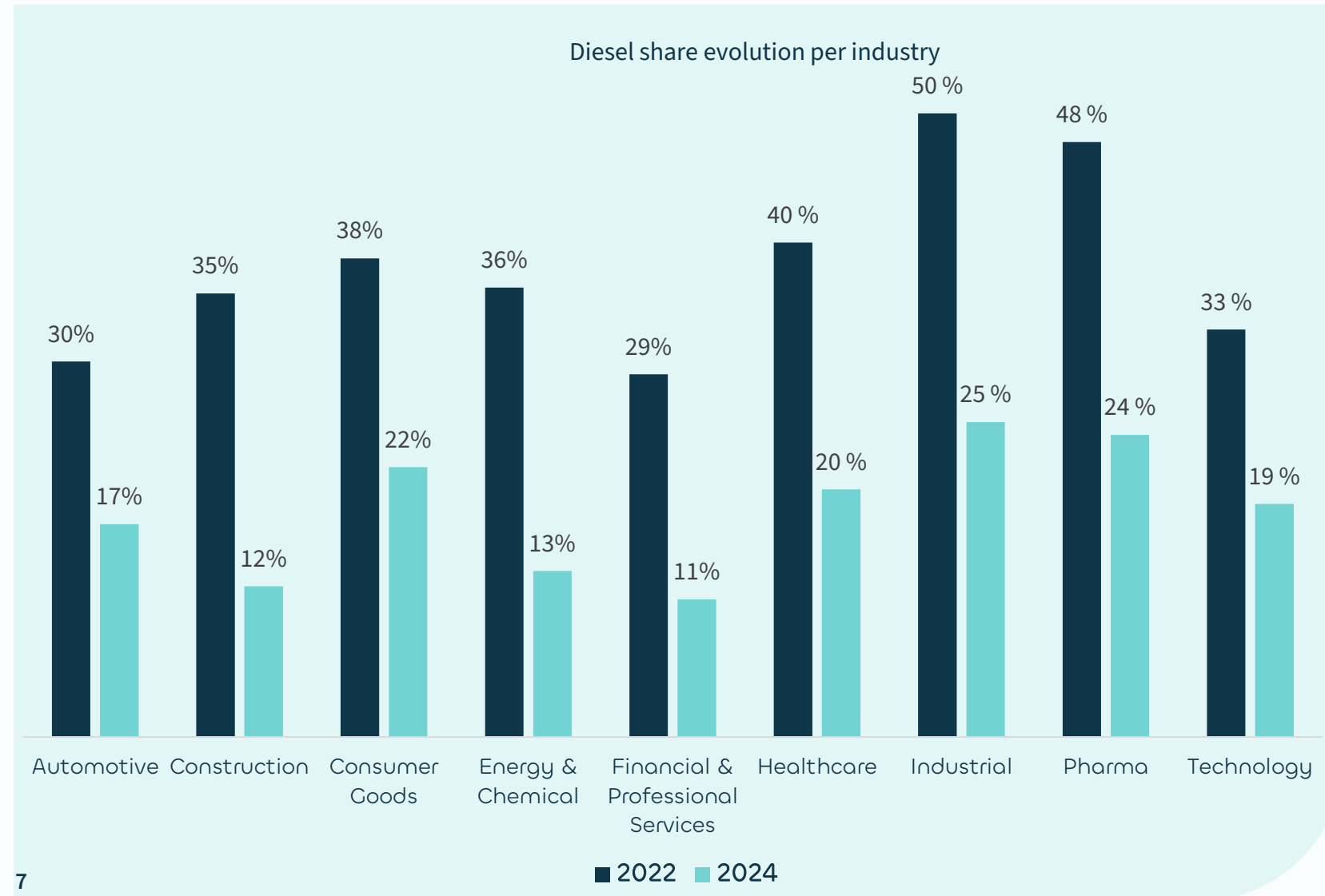
Average performing industries



Lowest performing industries



# All industries have almost halved the share of diesel vehicles in fleet since 2022.



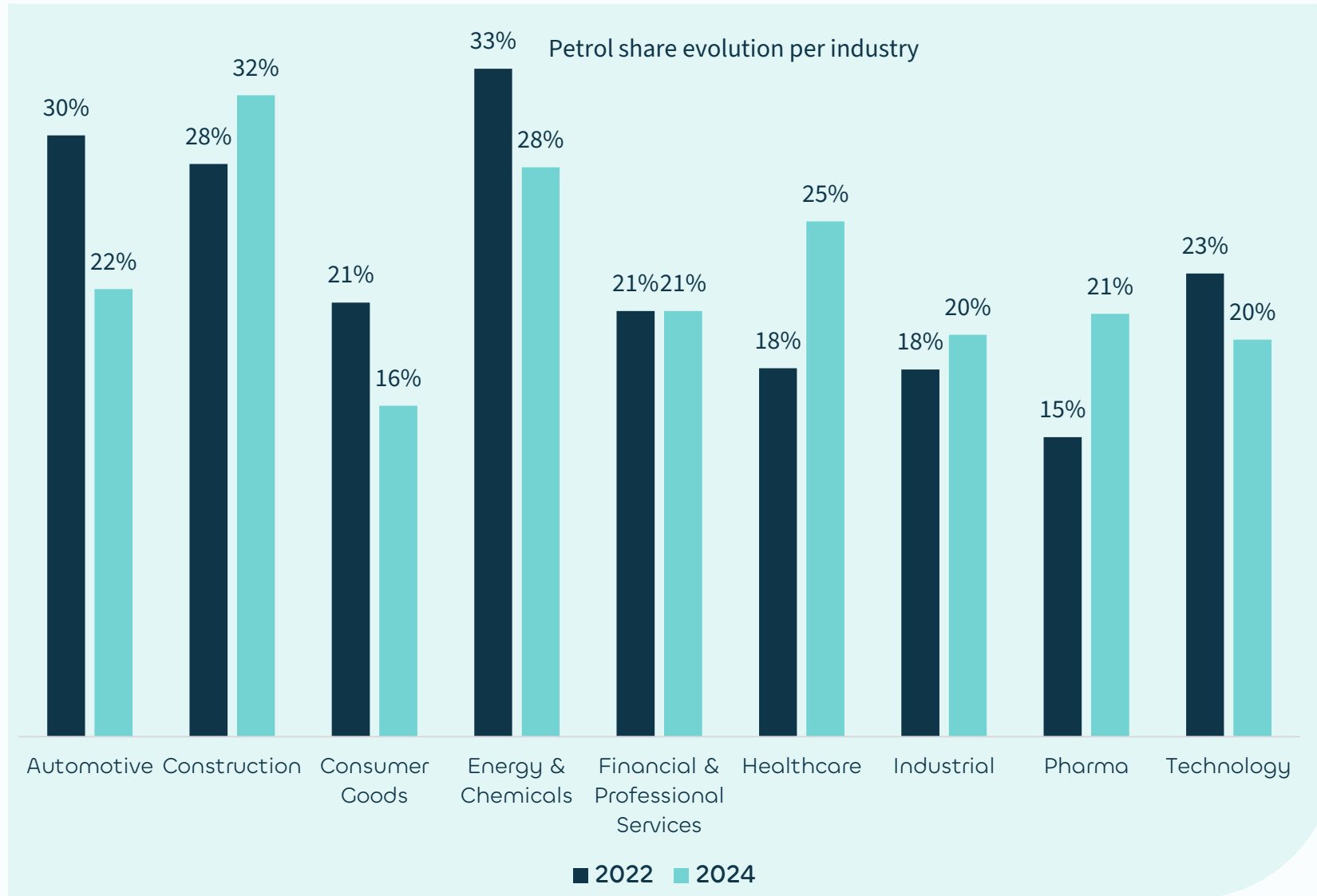
Industrial and pharmaceutical companies have the highest share of diesel vehicles, however both industries have halved the amount of diesel deliveries since 2022.

Diesel vehicles now make up less than a quarter of new vehicle orders in all industries, except the industrial industry (25%).

Diesel vehicles represent less than 15% of new vehicles in three industries - construction, energy & chemical and the financial & professional services



# The share of petrol cars is increasing in some international industry fleets.



Only four industries - automotive, consumer goods, energy & chemical and technology industries - reduced the share of new petrol cars since 2022.

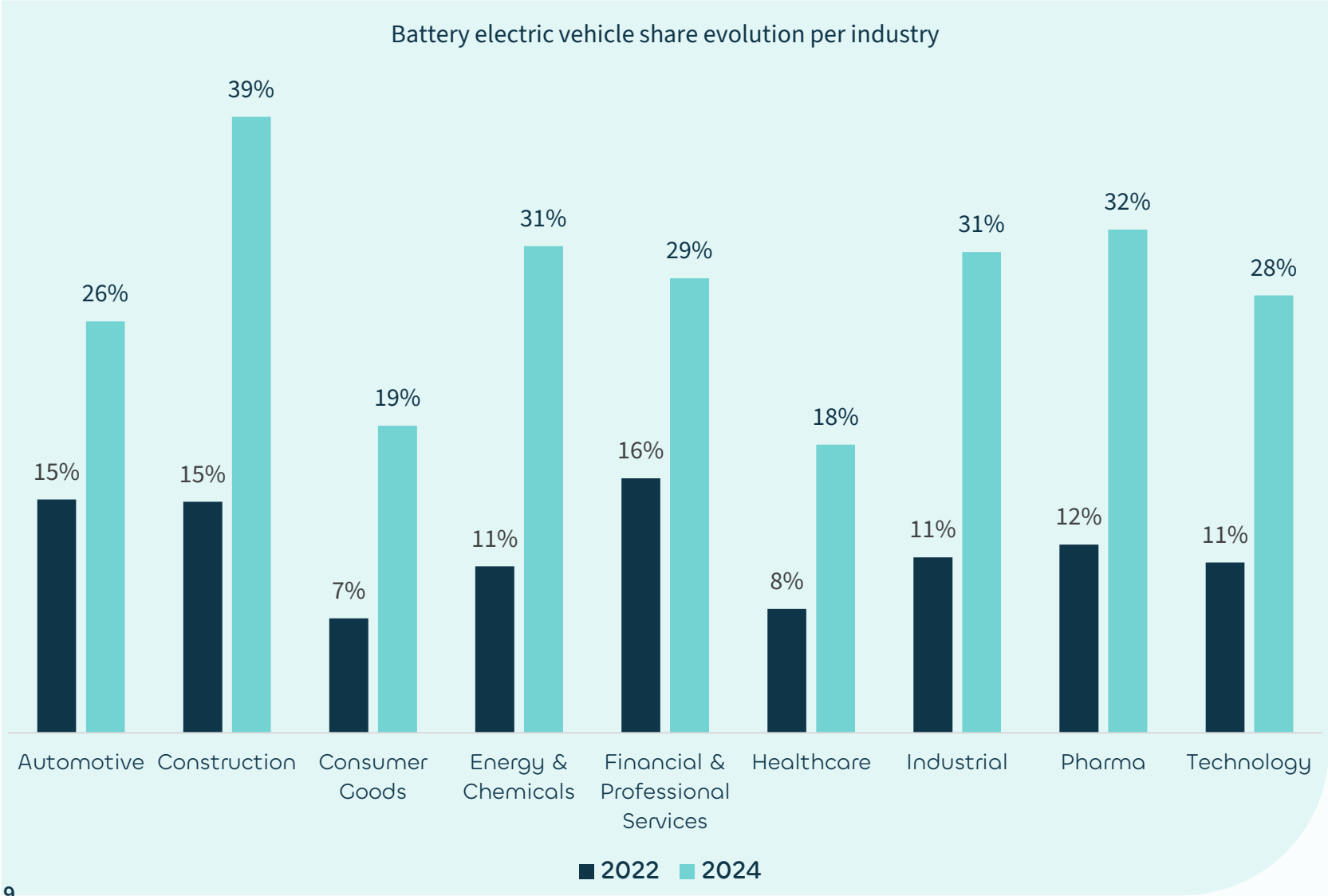
Four industries increased the share of petrol cars in fleet – construction, healthcare, industrial and pharma.

The financial & professional services industry was the only industry that remained stable with petrol share.





# All industries have seen increases in the share of battery electric vehicles in fleet.



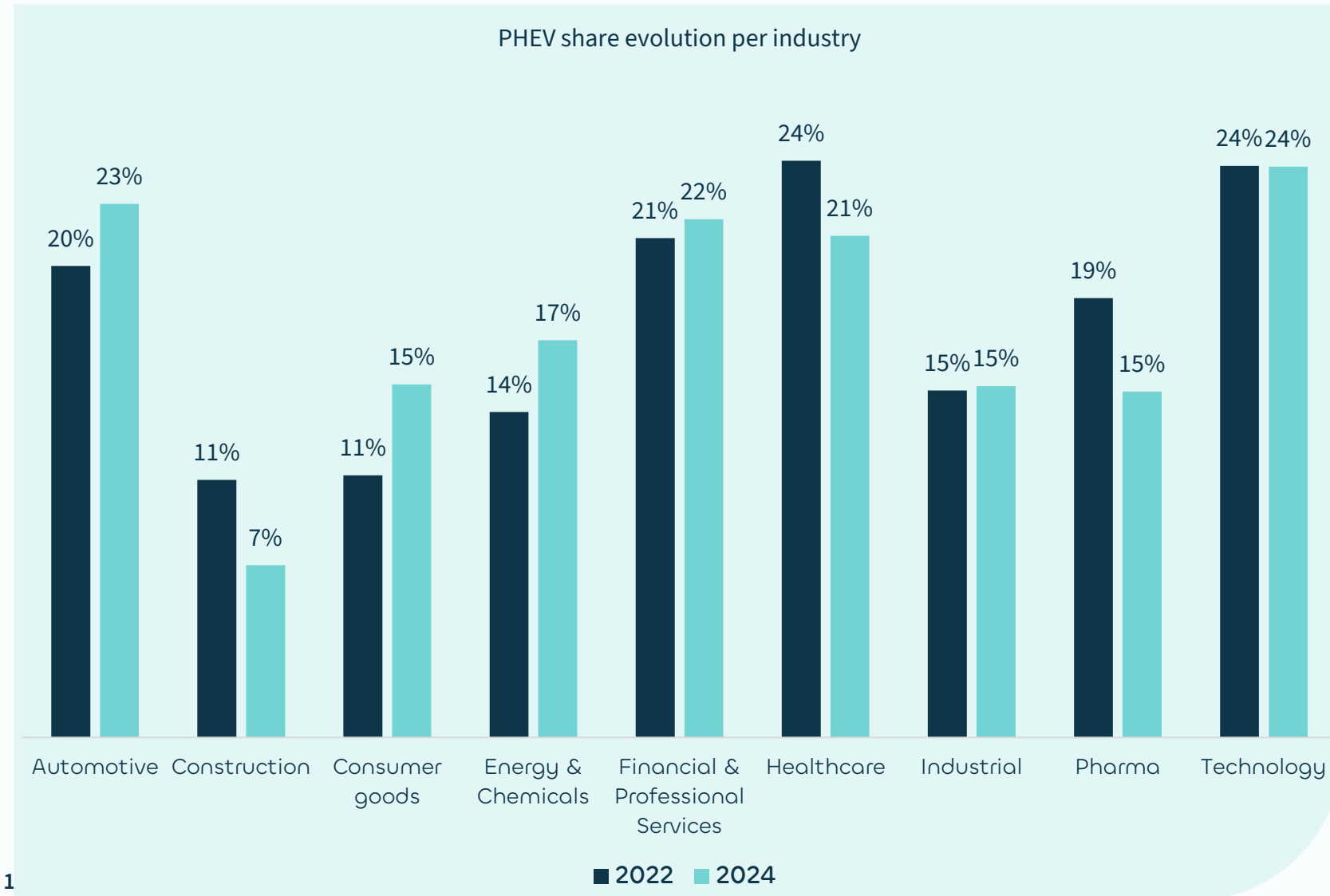
International construction industry fleets have seen the largest increase in battery electric vehicles (BEV) in fleet since 2022 with 39% of new vehicles in 2024 being BEV.

Only two industries, consumer goods and healthcare, have a BEV fleet share of less than 20%.

All industries except automotive and financial & professional services industries have more than doubled the share of BEVs in fleet.



# The share of plug-in hybrid electric vehicles (PHEV) in international fleets has remained stable.

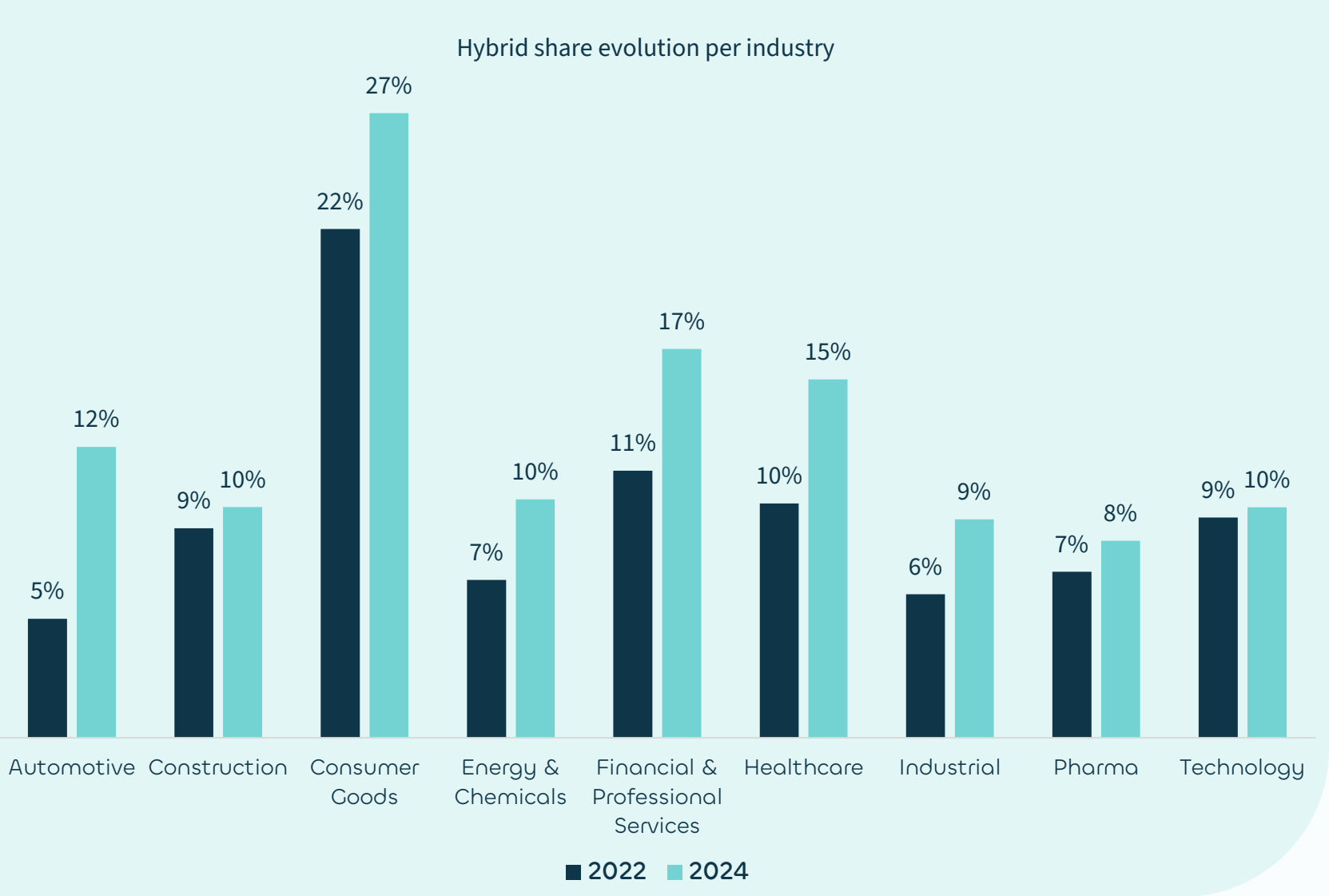


Only three industries have decreased the share of plug-in hybrids in fleet – pharmaceutical, construction and healthcare.

The consumer goods industry has seen the largest increase in plug-in hybrids going from 11% in 2022 to 15% in 2024.



# All industries have seen modest increases in the share of hybrid vehicles in fleet.

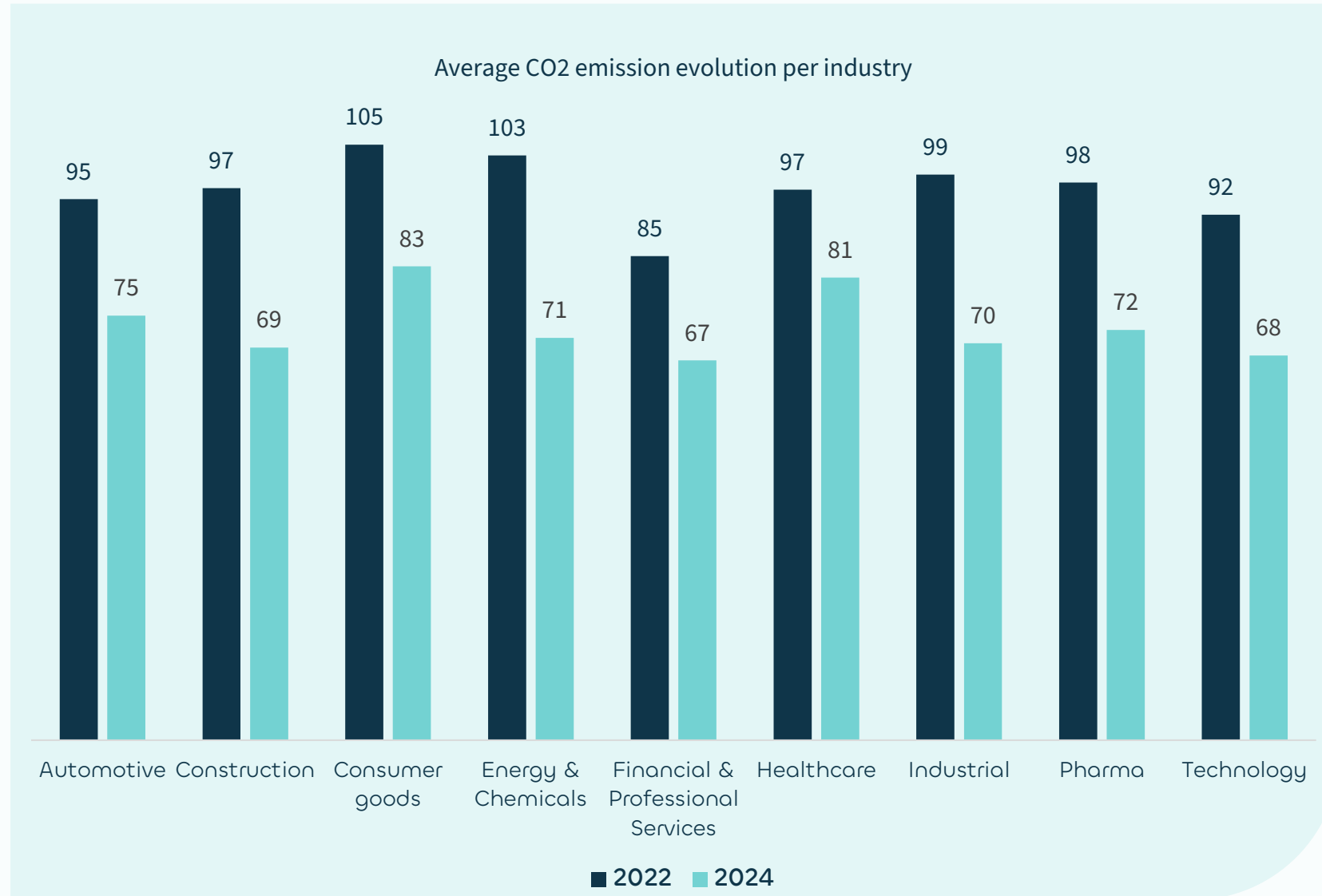


The automotive and financial and professional services international industry fleets have seen the largest increases in hybrid vehicles.

The construction, pharmaceutical and technology industries increased the share of hybrid vehicles in fleet by the smallest amount (1 percentage point).



# On average, CO<sub>2</sub> emissions\* for new vehicles in fleet have decreased by 25% since 2022.



Average CO<sub>2</sub> emissions for new vehicles have decreased in all industries over the past two years.

The largest decrease in the energy & chemical international industry fleets with a 30% decrease compared to 2022.

The healthcare industry had the smallest decrease in average CO<sub>2</sub> emissions going from 97 g/km in 2022 to 81 g/km in 2024 (16% decrease).

\* OEM estimated emissions



# Appendix: 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; Chemical:</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 that provide services for diagnosing, preventing, treating and curing health conditions.
<b>Industrial:</b>	Companies producing or maintaining physical material or products for the B2B sector.
<b>Pharmaceutical:</b>	Companies involved in developing, producing and distributing pharmaceutical products.
<b>Technology:</b>	Companies primarily involved in the development of hardware or software products.
<b>Transport:</b>	Industry that provides services to transport people or goods.





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