

2009

Corporate Fleet Emissions Survey Report

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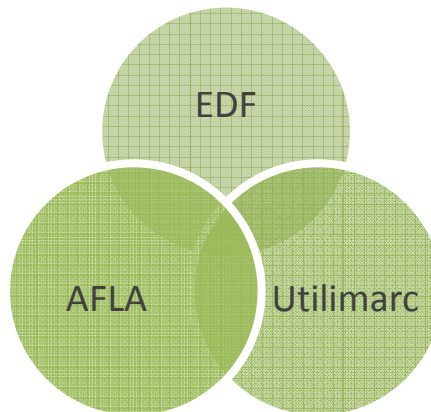
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A Partnership Effort



Environmental performance is an increasingly important area of focus for all types of vehicle fleets. As with other critical areas of performance, benchmarking against peers is an important, objective way to measure the effectiveness of a fleet organization's effort to identify opportunities for improvement.

To help accomplish this, Environmental Defense Fund (EDF), the Automotive Fleet & Leasing Association (AFLA), and Utilimarc teamed up to undertake a comprehensive benchmarking survey of environmental performance among commercial vehicle fleets.

The survey results will enable participating commercial fleets to better understand the effectiveness of their current environmental programs, identify characteristics that are consistent among leading programs and demonstrate effective strategies for reducing vehicle fleet environmental footprints.

Environmental Defense Fund

EDF is a leading national nonprofit organization representing more than 700,000 members. Since 1967, EDF has linked science, economics and law to create innovative, equitable and cost effective solutions to society's most urgent environmental problems. To learn more about our work with leading fleets, visit: www.edf.org/greenfleet

AFLA

The Automotive Fleet & Leasing Association (AFLA) is the forum dedicated to improving communication between sellers, buyers, fleet managers, lending institutions, fleet management companies, used vehicle marketers, and allied automotive service companies.

Utilimarc®

Utilimarc® is a nationally recognized fleet benchmarking and consulting firm. With methodologies (patent pending), a proven track record and client partnerships, Utilimarc can deliver the resources and skills necessary for your fleet to become best in class.

Thank you to all the companies that participated in this first-of-a-kind effort.

-Your EDF, AFLA and Utilimarc representatives.

About The Survey

- Contained 16 questions concerning environmental vehicle fleet performance
- Distributed to the 300 largest corporate vehicle fleets in the U.S. and fleets that are members of AFLA
- Survey participants were anonymous

Results¹

- **72.7% of companies reported they currently have a program to improve the environmental performance of their fleet**
- 30.3% reported that fleet management is among the top 2 or 3 environmental priorities for the company
- **43.8% calculate their fleet's greenhouse gas (GHG) emissions annually**
- Results showed an average of 0.47 kg GHGs per mile for fleets that regularly measure their emissions, and 0.75 kg GHGs per mile for those that do not
- **69% of companies reported they do not publically disclose their GHG emissions at this time**
- 29% reported to have a fleet specific GHG reduction goal; 50% of which have an absolute reduction goal
- **Most companies rank fleet fuel economy improvement as their highest priority among environmental initiatives**
- 35.5% reported they agree that there are low cost to no-cost options available today that will help their fleet significantly reduce GHG emissions
- **7,612,096 is the average number of miles driven by a fleet**
- 2,672 is the average number of vehicles in a fleet

¹ Applicable to only those companies who completed the survey

Conclusions

From the survey, we were able to establish a comprehensive picture of the current state of environmental performance among leading fleets.

Given the vast range of participation in the survey, it appears that most fleets are at the very least recognizing the impact a fleet has on the environment. Fleet management leads as the top environmental priority for one-third of companies. And over 70% of companies currently have a program for improving the environmental performance of their fleet. Nearly half of companies report they calculate the total quantity of greenhouse gas emitted by their fleet annually. This is a promising figure that reveals not only knowledge about greenhouse gases but also the actions taken to manage them.

Companies reported they encourage drivers to optimize fuel economy of their vehicles by communicating with them regularly about driving practices that can reduce fuel. Other initiatives include asking drivers to sign a pledge to follow good driving practices, assigning drivers to take a course in fuel-smart driving practices or monitoring unit-specific miles per gallon.

When asked to indicate under which scenario they project the greenhouse gas impact of their decision, ordering new vehicles strongly emerged as the number one response. Considering the purchase of vehicle add-ons, such as telematics was a distant second. It is not surprising that fuel economy is the leading environmental priority. Companies are clearly seeing the tight relationship between this operational issue and environmental performance.

Other efforts to reduce GHG emissions include right-sizing vehicles to the job. Maintaining proper tire inflation and improving routing also rank as high priorities in the effort to reduce GHG emissions. While almost half of companies reported to calculate GHG emissions annually, 70% do not publically disclose the information. Whereas most companies do not have a fleet-specific GHG reduction goal, 50% of those companies that do also have absolute reduction goals.

Fleets are mixed on the perceived availability of low cost to no-cost options that can help their fleet significantly reduce GHG emissions.

Fleets that are actively managing their greenhouse gas emissions appear to be performing better than their peers with regards to emissions. Fleets that are measuring their emissions report a lower rate of emissions (0.47 kg GHG/mile compared to 0.75 kg GHG/mile).

Collectively, this survey displays that several leading companies are comprehensively managing their fleet GHG emissions. Steps such as measuring emissions, incorporating the most efficient vehicle that makes business sense, minimizing miles traveled and optimizing vehicle use can help fleets start to reduce their GHG emissions. Sharing best practices and benchmarking performance with peers can help all fleets better identify the most effective opportunities for their fleets to reduce GHG emissions.

Greenhouse Gas Emissions Analysis

This survey was the first ever public benchmarking effort for vehicle fleet greenhouse gas emissions. All participants were asked to provide emissions data. Those that did not have emissions data at the ready were asked to provide fuel consumption data. Their GHG emissions were then calculated from the fuel data². In total, 18 fleets provided sufficient data to be included in this analysis.

Grouping	Ave GHG (kg)/ Mile	Ave GHG MT/ Vehicle
All 18 Fleets	0.76	11.23
Light-Duty Fleets	0.52	9.75
Mixed Light-and-Medium Duty Fleets	0.76	11.43
Energy Sector Fleets	1.09	10.69
Service Fleets	0.59	10.41
Sales Fleets	0.68	10.82
Fleets Measuring GHG Emissions	0.47	9.54
Fleets Not Measuring GHG Emissions	0.75	10.53
Fleets Reporting GHG Emissions	0.53	9.61
Fleets Not Reporting GHG emissions	0.74	11.42
Reducing GHG a Priority	0.57	9.63
Reducing Not a priority	0.72	11.44

² Emissions were calculated using the EDF-NAFA Fleet Emissions Calculator: www.edf.org/fleetcalculator.

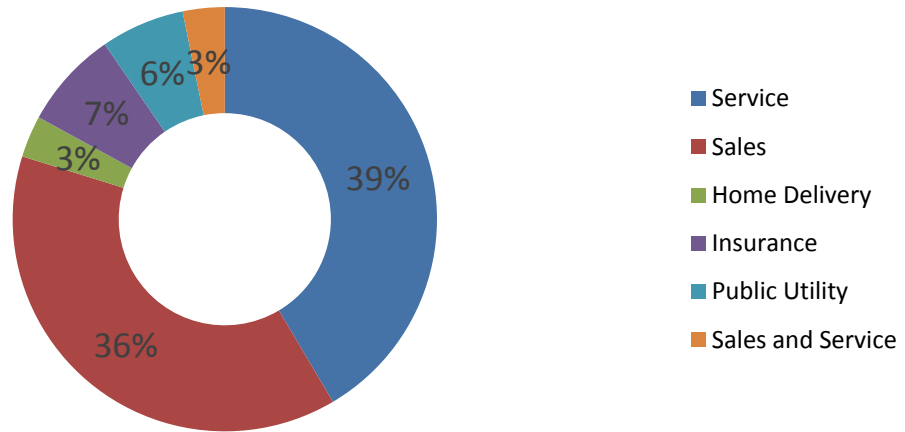
The average emissions of these fleets were 11.23 metric tons of greenhouse gases per vehicle and 0.76 kilograms of greenhouse gases per mile driven. For comparison purposes, a gasoline-fueled vehicle that achieves a twelve miles-per-gallon fuel economy average emits 0.77 kg GHG/miles.

As expected, different types of fleets had different emissions profiles. Light-duty only fleets reported an average annual emission per vehicle of 9.75 metric tons and 0.52 kg GHG/mile (roughly equivalent to an achieved 18 MPG of a gasoline fueled-vehicle). Mixed light-and-medium duty fleets emitted nearly 11.5 metric tones/ vehicles and 0.76 kg GHG/miles

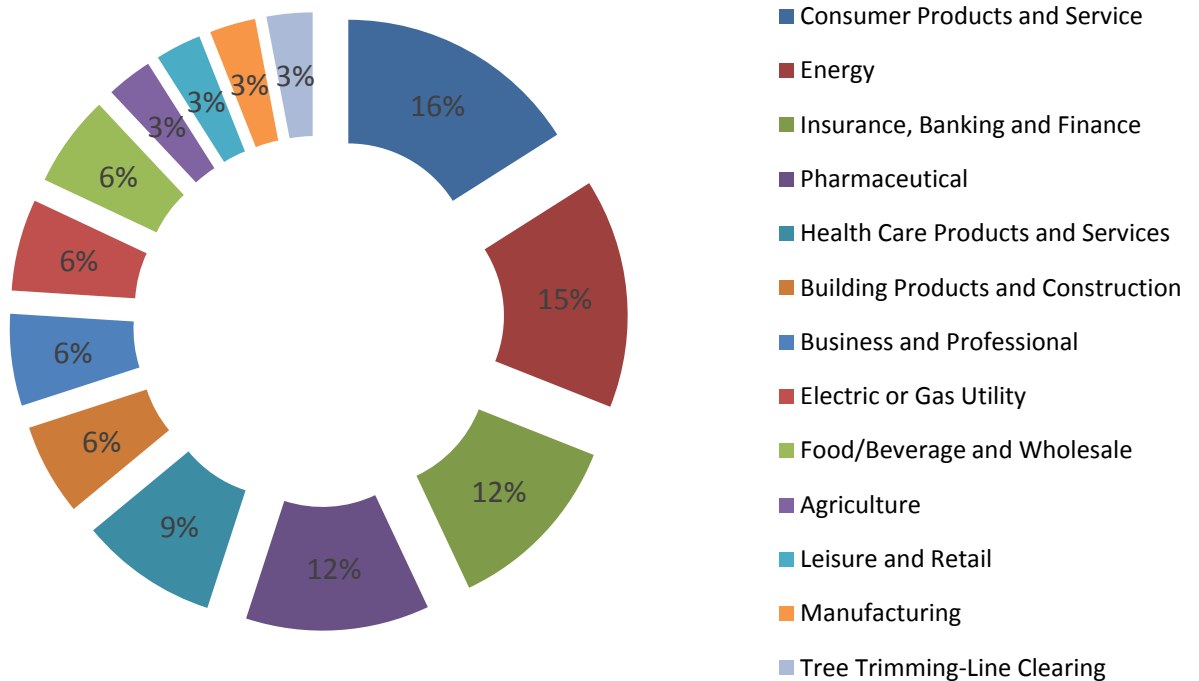
Fleets that were actively managing their greenhouse gas emissions outperformed their peers and had less emissions overall. Fleets that reported regularly measuring their greenhouse gas emissions had an average emissions rate of 0.47 kg GHG/mile. Their peers reported 0.75 kg GHG/miles. Fleets that claimed reducing greenhouse gas emissions were among their top two fleet environmental priorities and those that publically reported their emissions also reported lower emissions per vehicle and per mile than their peers.

Graphs and Charts

What is the primary use of your fleet?



What is your company's main industry?

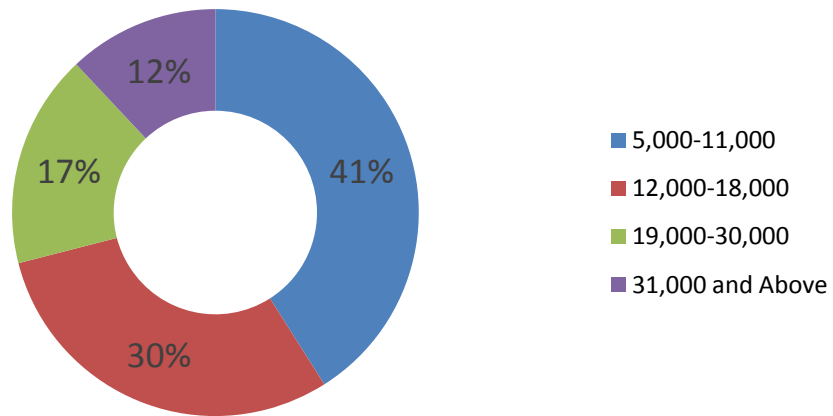


How many vehicles are in your fleet?

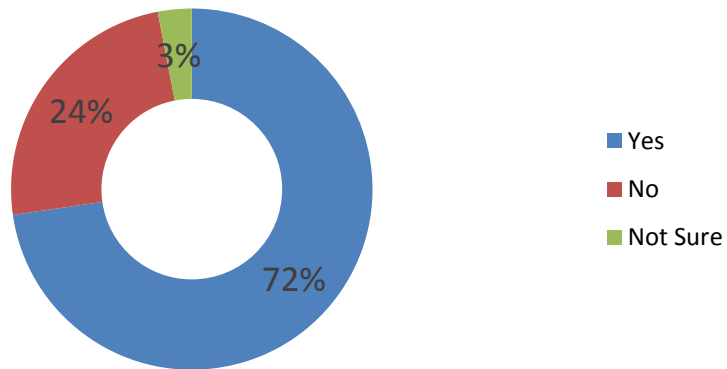
Item	Percentage
500 or less	9.09%
501-1,000	6.06%
1,001-5,000	45.45%
5,001-10,000	21.21%
10,000 and above	18.18%

What is the average amount of miles driven per vehicle?

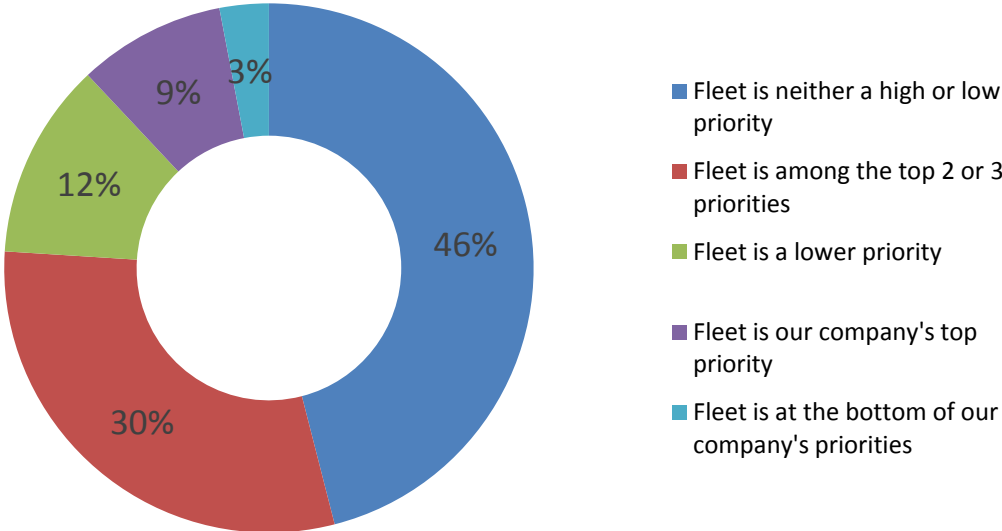
Total Average: 19,970



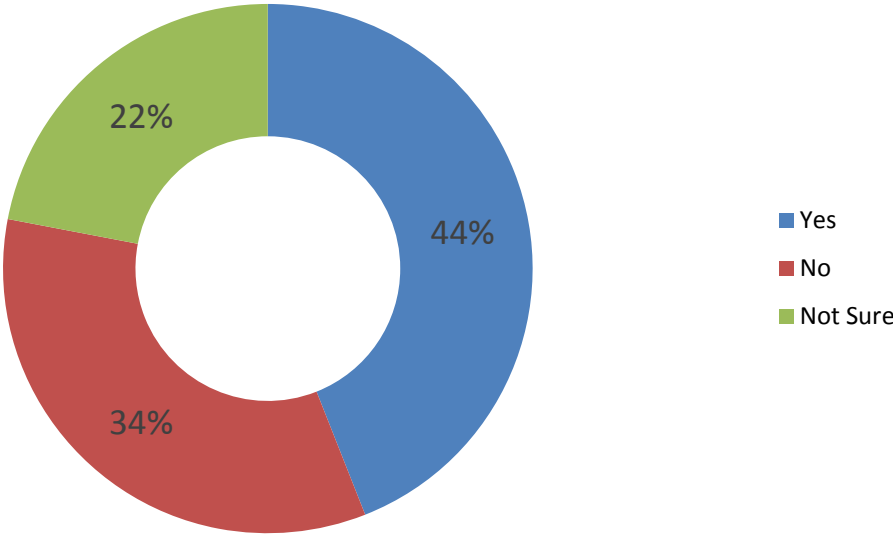
Does your company currently have a program for improving the environmental performance of its fleet?



Where does fleet management rate among the environmental priorities of your company?

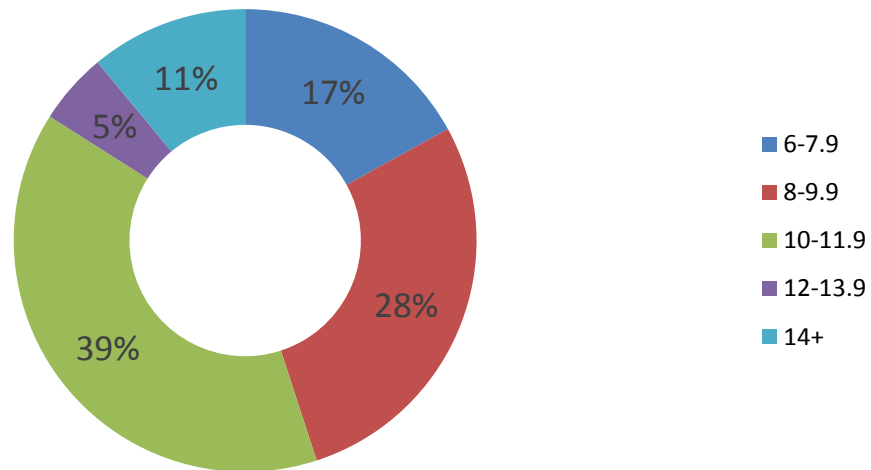


Does your company calculate the total quantity of greenhouse gas emissions (GHGs) emitted by your fleet at least on an annual basis?

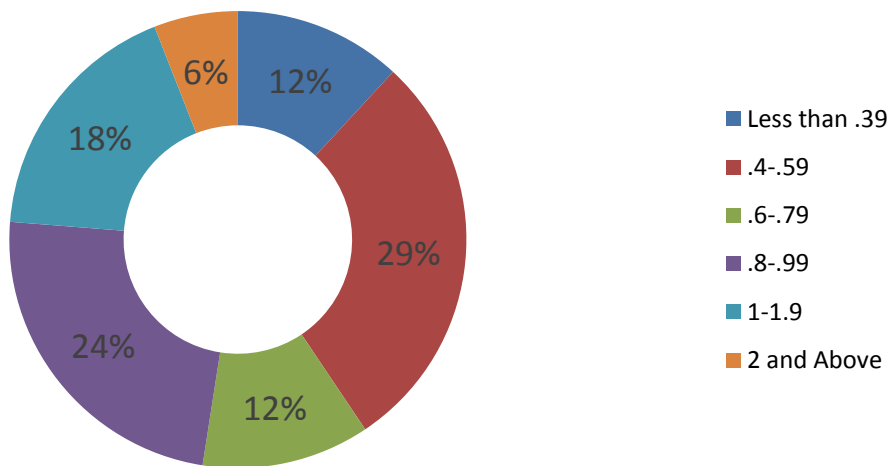


Participants were asked to provide data on fleet greenhouse gas emissions. Fleets that did not have this data available were asked to provide fuel consumption data, which was then used to calculate greenhouse gas emissions.

Fleet Average GHG Metric Tons (C02e) per vehicle



Fleet Average kg GHG (C02e) per mile



Indicate under which of the following scenarios you project the greenhouse gas impact of your decisions: (check all that apply)

Item	Percentage
Ordering new vehicles	87%
Considering vehicle add-ons, such as telematics	32%
Deciding on maintenance plans	16%
Planning driver routes	16%
None of the above	13%
Other	3%

Which of the following actions do you take to encourage your drivers to optimize the fuel economy of their vehicle: (check all that apply)

Item	Percentage
Communicate with drivers regularly about driving practices that can reduce fuel consumption	81%
Ask drivers to sign a pledge to follow good driving practices	15%
Assign drivers to take a course in fuel-smart driving practices	15%
Monitor vehicle until specific MPG	15%
Encourage minimal idling	3%
Other	3%
None of the Above	9%

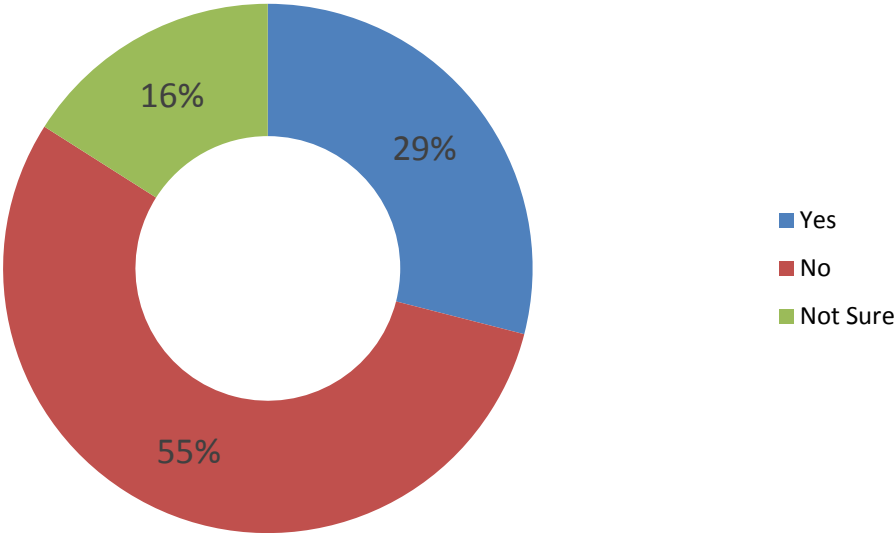
Rank the following areas in priority order for your efforts to reduce GHG emissions: (1 being the highest; 10 the lowest)

Value	Average Rank
Right-sizing vehicles to the job	1.5
Teaching drivers fuel-saving tips	3.6
Reducing vehicle idling	3.8
Maintain proper tire inflation	4.2
Improving routing	4.9
Regulating vehicle top speeds	5.9
Restricting vehicle personal use	6.0
Cargo-weight reduction	6.1

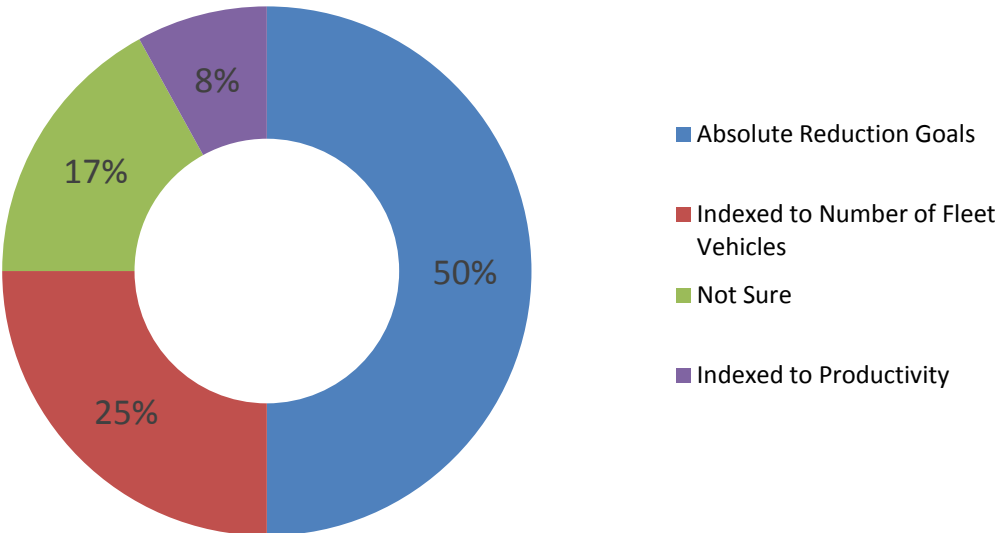
Where do you publically report your fleet GHG emissions? (check all that apply)

Item	Percentage
We do not publically disclose our GHG emissions at this time.	69%
Annual Report	10%
Press Release	7%
Annual Citizenship/Sustainability Report	7%
Web Site	3.5%
Other	3.5%
Unsure	10%

Does your company have a fleet-specific greenhouse gas (GHG) reduction goal?



If yes, what type of goal is it?



Rate the following environmental objectives by order of importance for your company: (1 being the highest priority; 4 the lowest)

Value	Average Rank
Improve fleet fuel economy	1.6
Reduce greenhouse gas emissions	2.7
Acquire more hybrid vehicles	2.8
Increase use of alternative fuels	3.0

Do you agree or disagree with the following statement? Please rate your level of agreement with it. 1 being agree strongly; 5 being disagree strongly.

There are low cost to no-cost options available to me today that will help my fleet significantly reduce GHG emissions.

