



RENAULT NISSAN MITSUBISHI

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Small businesses believe their fleets will be fully electric within 20 years

New data from Renault-Nissan-Mitsubishi highlights the strong demand for electric and autonomous fleets as e-commerce drives change.

- Sustainability is high priority for small business fleets
- The larger the fleet and the higher the company turnover, the more critical environmental sustainability appears to become
- Improved connectivity is the answer to logistical success, according to small businesses

Two thirds (66%)¹ of small businesses predict their fleets will be fully electric within the next 20 years, with 50%² expecting this to happen in half that time, global data shows.

The Renault-Nissan-Mitsubishi LCV business – which is part of the Alliance, the world’s leading automotive partnership – commissioned this survey to gain insight into thousands of small business owners and decision makers globally and found that almost all (93%) of business owners or decision-makers responsible for 50 vehicles or more, consider environmental sustainability of high importance.³

This development comes at a time when automakers are dramatically increasing their efforts to respond to a growing customer need for sustainable vehicles, as businesses prepare for tighter emissions regulations and seek ways to address climate change.

This trend towards electrification was reflected in Renault-Nissan-Mitsubishi LCV business’ latest sales results, as Renault’s European leadership of EV vans (46.2% market share) contributed to a 13.5% year-on-year growth of light commercial vehicles. The LCV business’ combined sales, which includes trucks, vans and frame-based SUVs, reached almost 2 million units, the highest sales totals in the organization’s history.

Groupe Renault, whose electrified LCV line-up is comprised of the Kangoo Z.E., Master Z.E., Twizy Cargo, and Zoe Societe, has announced that 100% of its vans will be electrified by 2022. The Nissan e-NV200 small all-electric van is seeing a significant upswing in demand. In 2018, production was up by 50% compared to the previous year to reach a total of 6,000 units. Mitsubishi offers the MINICAB MiEV van in Japan as well as commercial versions of the Outlander PHEV in some global markets.

This latest research has shown that the higher the turnover of the company and the bigger the fleet, the more important sustainability is to them.

Ashwani Gupta, Senior Vice President of the Renault-Nissan-Mitsubishi LCV business, said:

“These results show that the electrification of fleets is increasingly on the minds of our customers - not just for the financial efficiencies that EVs can deliver, but because environmental sustainability is clearly crucial to the future of their businesses. I’m impressed at how optimistic these fleet managers are about the speed in which their vehicles will be fully electrified.

“Renault is the global leader in making vans. Nissan makes great trucks and Mitsubishi are at the top when it comes to the production of frame vehicles. Combined, we are a truly global powerhouse, and working together on connectivity, powertrain developments and autonomous technologies will allow us to meet the rising demands of our customers and their businesses.”

In addition:

- 55% see their fleets becoming fully autonomous within the next 20 years, with 38% saying this is likely to happen within as little as 10 years.⁴
- 48% of businesses with a turnover of \$100m or more stated environmental sustainability is 'very important,' while only 25% of businesses with turnover between \$100k - \$9.9m said the same.⁵
- 35% of respondents said that business efficiency is their main motivation for adopting new technologies.⁶
- The top identified logistical business challenge is the growth of e-commerce and the rising demand for deliveries, at 18%, even more so than keeping up with regulations (17%) and changing customer expectations for delivery times.⁷

Connectivity will be most key to success from a logistics perspective, according to a fifth of the business leaders surveyed.⁸ Other business owners believe automation will play the biggest role in their future success (14%).⁹

In terms of an organization's willingness to adopt new technologies, more than a third (35%)¹⁴ said business efficiencies are the main reason for investing in new tech within their fleet, 21%¹⁵ said that cost saving drives their decisions, and 14%¹⁶ highlighted their desire to be more sustainable.

Renault offers fleet management services for its commercial line-up. Renault EASY CONNECT for Fleet is an ecosystem of connected services for business users that simplifies managing vehicle fleets and reduces running costs.

As part of the Alliance 2022 mid-term plan, Renault-Nissan-Mitsubishi is continuing to forecast that annual synergies will exceed €10 billion by the end of 2022. The member companies will also increase commonality, targeting nine million units based on four common platforms. The plan will also extend the use of common powertrains to 75 percent of total sales. In addition, 12 new zero-emission electric vehicles will be launched during the plan, and 40 vehicles will be introduced with different levels of autonomy.

ABOUT THE ALLIANCE SMALL BUSINESS RESEARCH

This survey looked at the future of urban logistics and electrification among small business owners and logistics decision makers from a variety of industries within the UK, USA, China, France, Mexico, Australia and Japan. 3,257 global respondents of businesses with between 1 – 49 employees and with turnovers up to and above \$100 million turnover took part between 21.12.2018 - 07.01.2019.

ABOUT RENAULT-NISSAN-MITSUBISHI

Groupe Renault, Nissan Motor Company and Mitsubishi Motors represent the world's largest automotive alliance. It is the longest-lasting and most productive cross-cultural partnership in the auto industry. Together, the partners sold more than 10.6 million vehicles in nearly 200 countries in 2017. The member companies are focused on collaboration and maximizing synergies to boost competitiveness. They have strategic collaborations with other automotive groups, including Germany's Daimler and China's Dongfeng. This strategic alliance is the industry leader in zero-emission vehicles and is developing the latest advanced technologies, with plans to offer autonomous drive, connectivity features and services on a wide range of affordable vehicles.

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REFERENCES

[1] [2] Global survey results of 3257 respondents Q7. Cumulative figures derived from 20.3% believing electrification will happen within the next 5 years, 29.5% in the next 10 years, and 16.4% in the next 20 years.

[3] Global survey results of 3257 respondents Q6 - *How important is environmental sustainability for your company's logistics?* Cumulative figures were derived from 44.2% answering "very important", 48.8% answering "fairly important" when combining the following two fleet size options, ('51-100 vehicles' category & 'More than 100 vehicles' category) into a 'Greater than 50 vehicles' category) in our reporting software.

[4] Global survey results of 3257 respondents Q8 - *In your opinion, how long will it be before fleets are fully autonomous?* Cumulative figures derived from 13.9% responding in 5 years, 23.7% saying in 10 years, and 17.4% saying in 20 years.

[5] Global survey results of 3257 respondents Q6 - *How important is environmental sustainability for your company's logistics?* 48% of businesses with a turnover of \$100m or more responded "very important". Only 24.2% of businesses earning \$100k - \$999,999 responded "very important; only 25.1% of businesses earning \$1m - \$9.9m responded "very important."

[6] Global survey results of 3257 respondents Q3 - *What is your main motivation for adopting new technologies within your fleet?* 35.4% of respondents answered "business efficiency."

[7] Global survey results of 3257 respondents Q2 - *Logistically, what is your biggest challenge as a business?* 17.8% of respondents answered "The growth of e-commerce and the rising demand for overall deliveries"

[8] [9] [10] [11] [12] [13] Global survey results of 3257 respondents Q1 - *Logistically, what do you believe is most key to the future of your success as a business?* 19.9% of respondents answered "improved connectivity", 13.9% answered "autonomous technologies," 9.2% answered "sub-contracting third party delivery services," 7.4% answered "more vehicles", 4.8% answered "drone deliveries", 4.1% answered "fleet electrification."

[14] [15] [16] Global survey results of 3257 respondents Q3 - *What is your main motivation for adopting new technologies within your fleet?* 35.4% of respondents answered "business efficiency", 21.1% answered "cost savings", 14% answered "to be more sustainable."

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