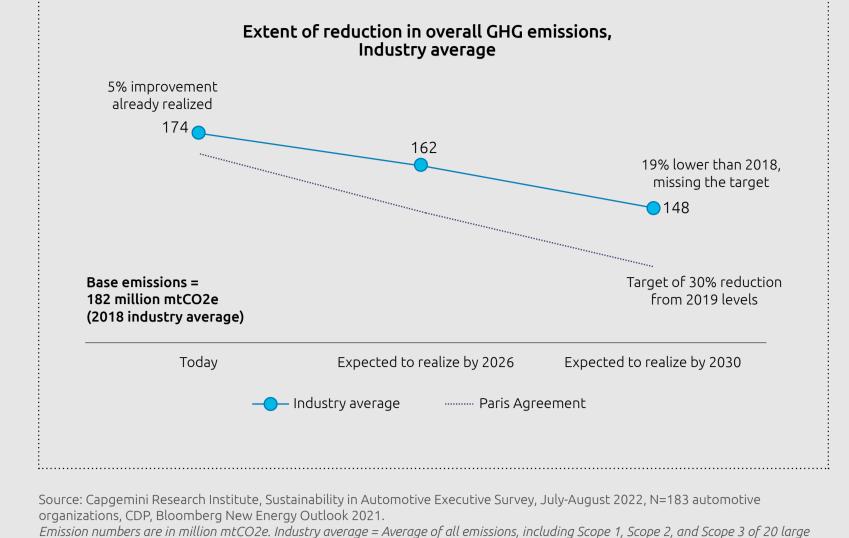
Since 2019, the automotive industry has shown little progress on sustainability

Automotive industry is falling short of Paris Agreement target



global OEMs for years 2018 and 2021 sourced from CDP (disclosed by OEMs). Maturity in sustainability strategies has

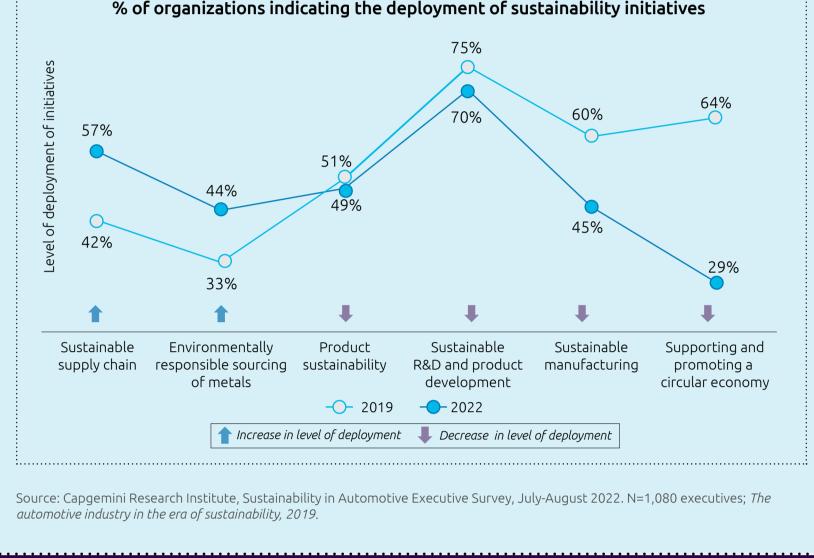
improved only marginally

30% in 2019 vs. 62% in 2019 vs. 35% in 2022 65% in 2022 Don't have a sustainability Have a comprehensive sustainability strategy with strategy but have multiple well-defined goals and target sustainability initiatives across timelines the group Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=1,080 executives; The

Implementation of top sustainability

initiatives has declined

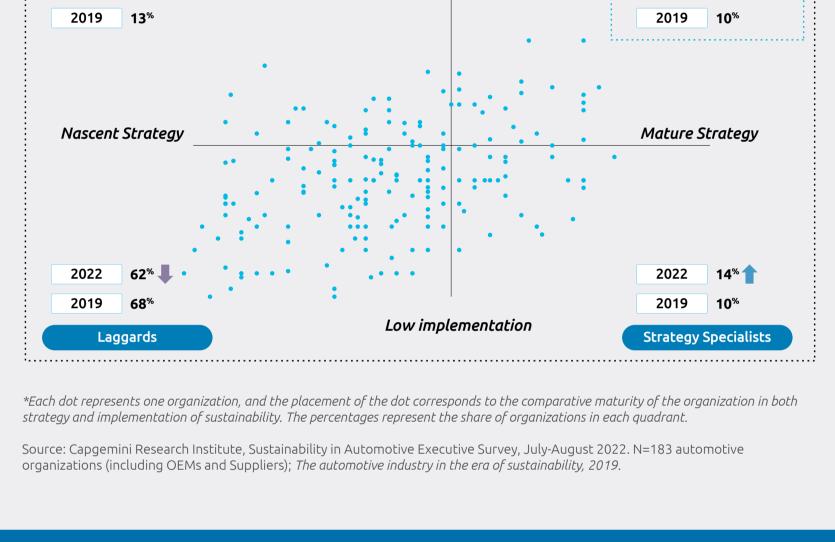
automotive industry in the era of sustainability, 2019.



Less than 10% of organizations are mature in their sustainability strategies as well as implementation

Maturity of sustainability strategies and its implementation: Automotive industry

Deployment Specialists Leaders High implementation 2022 15% 2022



Challenges to sustainability initiatives

Difficulty in

measuring and reporting emissions

40%

5% improvement already realized

9% improvement

already realized

165

Lack of internal

Lack of alignment

sustainability KPIs and

performance targets

between key

Insufficient linking of sustainability with day-to-day activities

19% lower than 2018,

missing the target

148

Are expected

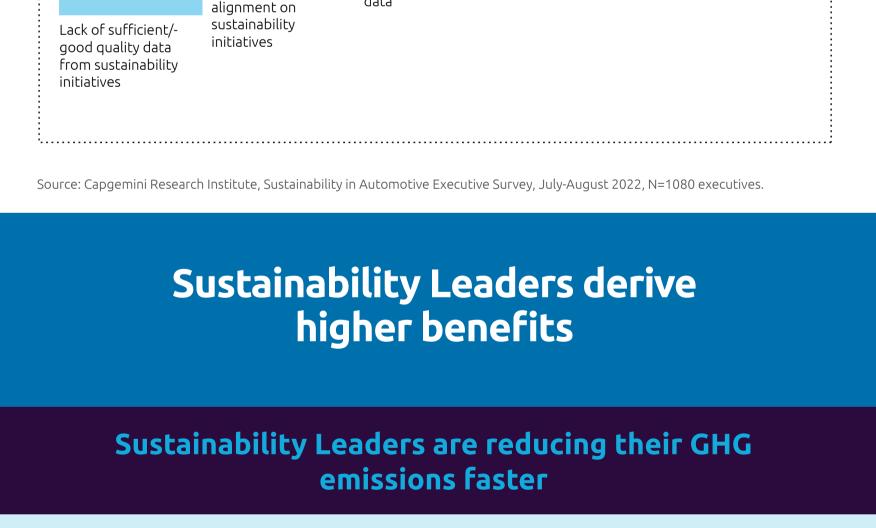
to boost their

efficiency by a

greater margin

operational

Top challenges faced by the automotive industry in their sustainability journey



Extent of reduction in overall GHG emissions, Leaders vs industry average

162

143

Base emissions = 35% lower than 182 million mtCO2e 119 2018, meeting the (2018 industry average) target Expected to realize by 2026 Expected to realize by 2030 Today Leaders Industry average Paris Agreement Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022, N=183 automotive organizations, CDP, Bloomberg New Energy Outlook 2021. Emission numbers are in million mtCO2e. Industry average = Average of all emissions, including Scope 1, Scope 2, and Scope 3 emissions of 20 large global OEMs for years 2018 and 2021 sourced from CDP (disclosed by OEMs). Further, Sustainability Leaders benefit in terms of operations and attracting talent

Source: Capgemini Research Institute, Sustainability in Automotive Executive Survey, July-August 2022. N=183 automotive

Have better

talent

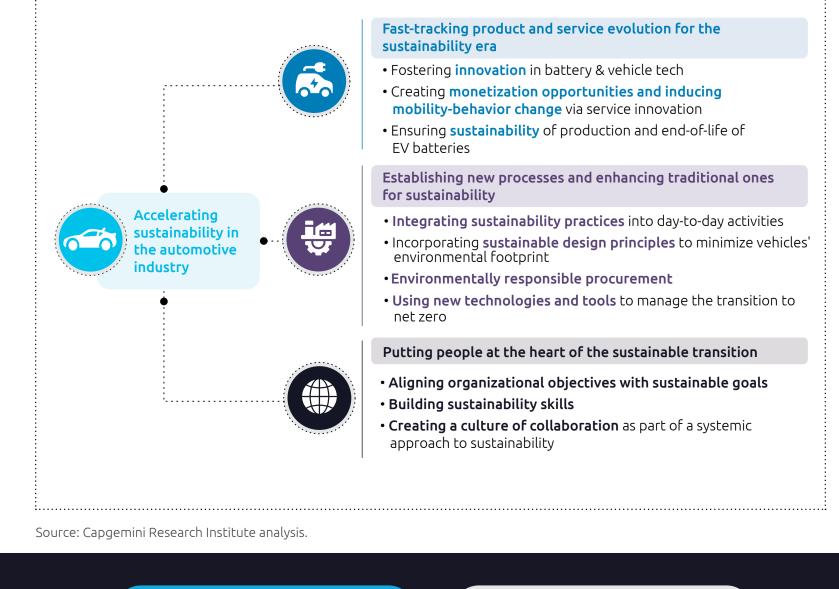
organizations.

employer brand

image and higher

attractiveness for

How can automotive organizations accelerate towards a sustainable future?



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