FleetNews Special report

Fleet 200 2025

THE UK'S BIGGEST FLEETS

Analysis and insight into the UK's professional car, van and truck fleet operators

- OVERVIEW
- TOP 100 TABLE
- FLEET CHALLENGES
- FLEET TEAMS
- CAR FUNDING METHODS
- CAR FUELS DATA
- CAR OPERATING CYCLES
- CAR JOURNEY DISTANCES
- VAN FUNDING METHODS
- VAN FUELS DATA
- VAN OPERATING CYCLES
- VAN JOURNEY DISTANCES
- INCIDENT RATES
- DIVERSITY
- CASH ALLOWANCES
- PRIVATE SECTOR
- PUBLIC SECTOR

Fleet operators are under pressure to do more with less

Jason Chamberlain,
Chief Revenue Officer, DTM

Vehicles are running longer, budgets are tighter, and sustainability goals are rising. Tyre management is now a key part of keeping fleets safe, compliant and cost-efficient.

At Direct Tyre Management, we work with some of the UK's most respected fleets to provide smarter tyre solutions that reduce downtime and keep vehicles moving. With nationwide coverage and a fully mobile fitting network, we support operators whether they're running local delivery fleets or covering long-distance routes.

Our integrated reporting tools give full visibility of tyre condition and usage, helping managers plan ahead, control costs and stay compliant. Proactive tyre management reduces the risk of breakdowns and helps extend replacement cycles, ensuring vehicles remain safe and reliable.

Sustainability is also central to our approach. From retreading and recycling to strategies that cut emissions, we help fleets align tyre policy with wider environmental commitments.

As fleet demands shift, we stay focused on what matters most to our customers—keeping vehicles on the road, costs under control and operations running smoothly.

As customer needs evolve, so do we. Whether managing a mixed fleet or adapting to new funding models, Direct Tyre Management delivers flexible, scalable solutions built around the way you operate.

Email: enquiries@directtyre.com
Phone: 01253 385850

A trusted solution for a modern fleet

Adrian Brabazon,
Head of UK Fleet Solutions, bp

bp Fleet Solutions is a trusted partner for fleets. We provide innovative energy and mobility solutions designed to meet the evolving needs of mixed-fuel fleets, from traditional fuels to EV charging, and other lower-carbon alternatives. Our services are tailored to support fleets of all sizes, offering access to one of the UK's largest public EV charging networks and an extensive number of fuel sites.

We care about helping businesses succeed which is why we're proud to partner with Fleet200. Working closely with industry leading fleets keeps us on the pulse of the constantly evolving challenges and opportunities in the industry. That's why we have wide range of fuel cards, competitive fuel and charging discounts, and digital tools to help fleet managers navigate the transition.

We help businesses take control of costs, streamline operations, and improve efficiency. Our 24/7 online platform gives fleet managers full visibility over transactions and card activity, ensuring maximum control and convenience. Backed by a team of dedicated experts, bp is committed to delivering flexible, future-ready solutions that keep your fleet running smoothly today while preparing you for the demands of tomorrow.

The businesses in the Fleet200 are driving great change in the industry and we are there to support fleets now and in the future. We're with you all the way.

03456 030723
info.fleet@bp.com
bp.com

Geotab: Actionable Data for Fleet Excellence

Geotab, a global leader in connected vehicle solutions, provides a secure, high-availability platform tailored for fleets. Our solution enables companies to make strategic decisions based on actionable data insights. Trusted by over 100,00 customers globally, our platform is backed by industry-leading data scientists, engineers, and AI experts.

Comprehensive Driver Safety and Risk Reduction
Our customisable and expandable solutions prioritise driver safety. We support managers by monitoring trends, benchmarking performance, and delivering near real-time coaching based on risky behaviours identified by AI-powered dash cameras. This actionable data empowers your risk-reduction strategies, enabling you to monitor changes to your fleet's risk score and directly predict collision reduction.

Streamlined Compliance and Operational Efficiency
Our software extracts relevant insights, allowing teams to actively improve adherence to customer SLAs and the Working Time Directive, rather than manually collating information. This software is fully customisable to align with diverse policies, ensuring every vehicle is safe to drive.

Geotab also drastically enhances operational efficiency by integrating fleet management with advanced routing and scheduling, leading to optimised routes and reduced travel times. We automate tasks, minimising manual intervention and enabling a focus on delivering exceptional customer service.

Feasible EV Transition and Health optimisation
We help fleets responsibly transition to electric vehicles (EVs). Our data-centric approach creates a feasible and financially justified roadmap by analysing your fleet's data to recommend the right-sized EV replacements. Our specialist eLCV data support helps you get the fastest ROI.

Crucially, Geotab's rich engine data and AI-powered insights are critical tools to proactively optimise vehicle health and significantly reduce the risk of costly, unplanned downtime. Potential problems are predicted in advance, often weeks before a failure occurs, allowing the workshop to schedule timely maintenance. We deliver this global data intelligence through our trusted reseller network, ensuring both global strategic consultation and vital local support.

infouki@geotab.com
www.geotab.com/uk

GEOTAB®

Is your fleet ready for tomorrow's challenges?

Jon Lawes, Managing Director of Novuna Vehicle Solutions

With budgets under scrutiny and pressure to deliver value, maximising the performance of your fleet has never been more critical. From unplanned downtime to underutilised vehicles, costs and risks can quickly escalate. That's why at Novuna Vehicle Solutions, we own our customers' challenges, partnering with you to take control.

In today's evolving landscape, the right fleet partner makes all the difference. We bring specialist knowledge, technical expertise and decades of experience, combined with a collaborative approach that aligns with your day-to-day pressures and long-term goals. Recognised for our customer-first culture and excellent Trustpilot rating, we're trusted by organisations nationwide to deliver reliable, transparent service that makes a measurable difference. From rising costs and compliance demands to efficiency targets and technology adoption, our flexible fleet solutions are built around your priorities.

By understanding your operation, whether a single site or a national network, we develop intelligent, asset-led strategies that reduce spend, improve performance and keep vehicles on the road. With the insight, tools and support we provide, your fleet runs efficiently, safely and with confidence. Any asset, anywhere.

Decarbonisation is also high on many agendas but achieving it at scale and cost-effectively requires a joined-up strategy. Our in-house team manages every step, from infrastructure design to vehicle strategy, supported by trusted partners. We deliver complete decarbonisation solutions tailored to your business.

Don't wait to get more from your fleet. Visit novunavehiclesolutions.co.uk to ensure your fleet is future-ready for tomorrow, together.

Novuna® Vehicle Solutions

Bridging the platforms gap to help future-proof your fleet operations

Andrew Holgate, CEO

For more than 20 years, Jaama has led the way in fleet management software, proudly supporting many members of the Fleet200.

As the industry evolves in response to new compliance demands, changing legislation and sustainability goals, fleet operations are becoming more complex and diverse.

Our market-leading Key2 platform goes beyond simply storing data – it actively manages, monitors and analyses it, helping organisations get the most from their vehicles and drivers. Supporting more than 1.5 million assets across leasing, rental, corporate and public sector fleets, Key2 is built to meet the needs of modern fleet operations.

Recent research shows that only 40% of fleet managers currently use integrated systems. The remainder are burdened by disconnected platforms or a lack of integration altogether. Jaama bridges this gap by delivering the automation and oversight needed to future-proof fleet operations – from reducing downtime to enhancing data accuracy – freeing up managers to focus on strategic improvements.

As a proud sponsor of the Fleet200 Strategy Network, we are committed to helping fleets and fleet managers deliver results while navigating the complexities of compliance, safety and cost efficiency.

jaama

Introducing the refined intensity of MG IM

Geraint Isaac,
Head of Fleet Sales, MG Motor UK

Infused with advanced technologies and powered by a 751bhp* motor, the MG IM5 and MG IM6 are a contradiction in exactly the right way. They combine unprecedented battery technology, elegant form and exquisite detailing. And, true to the age-old MG maverick spirit, they eclipse all their category rivals in value.

Beneath the sleek exterior lies the aptly named Hurricane Motor – a 553kW* electric powerhouse delivering 802Nm of instant, silent torque. The result? Supercar-like acceleration – 0–62mph in just 3.2 seconds in the MG IM5**. Inside, however, calm prevails. Double-layered glass, active noise cancellation, and ultra-soft leather-style seating turn raw performance into effortless serenity.

A panoramic glass roof, 26.3-inch sweeping driver display, and immersive 20-speaker audio system make the cabin a destination in itself. The 800-volt platform allows 10-80% charging in as little as 17 minutes^ on a 350kW ultra-fast charger. The MG IM range can travel up to 441 miles on a single charge^^, with all models eligible for the 3% BIK rate for fully-electric company cars.

Book a test drive today at your local MG dealer.

MG

* MG IM5 100 Performance and MG IM6 100 Performance and 100 Launch Edition. ** MG IM5 100 Performance.
^ 10-80% charging time applies to a 350kW Ultra-Fast charger under standardised test conditions. Charging times in real-world conditions will vary dependent on a number of factors, including, but not limited to, the age of battery, charging conditions, temperature and the existing charge of the battery, charger used and duration of charge. Charging times will be increased when using chargers of a lower capacity. Availability of 350kW-capable chargers may be limited dependent on your location.
^^ Range figures are calculated under test conditions, are for comparative purposes only and may not reflect real-life results.

WELCOME

The Fleet200 Strategy Network report is back!

Four years after we last surveyed the UK's largest fleets, we bring you the 2025 edition which details the key trends and developments that have taken – indeed, are taking – place among the company car, van and truck fleets run by the country's most professional and respected leaders.

Much has changed since 2021 as we detail on page 6, the introduction of the ZEV Mandate and the legacy of Covid, particularly its impact on vehicle and parts supply, among them.

And then there are all the external influences, the most notable of which is the torrent of new market entrants from China.

Four years ago, there wasn't a single homegrown Chinese brand in the UK; since GWM Ora launched the Funky Cat in late 2022, an astonishing 10 brands are now courting fleet decision-makers. And there's more to come, with Aion (part of GAC), Zeekr and Hongqi expected in the coming months.

Together, they have seized 4.5% of the market this year (to the end of September) – an incredible, nay unprecedented, rise. In September itself, they have grabbed a share of 7.8%!

With line-ups dominated by electric models, their share of the BEV market is even more eye-popping – 7.4% YTD and more than 10% in September.

Then there are the manufacturers with Chinese parents – MG, Volvo and Polestar to name but three. Bundle them into the mix and 13% of the total UK new car market is heading the way of the People's Republic.

Fleets welcome the explosion in choice that these new marques bring, as well as their ability to drive down prices, while also remaining cautious about reliability, aftersales support networks and data security.

Inside this report, we reveal the trends in operating cycles, speed of transition to electric, emissions data, incident rates and average size of fleet teams, giving you the opportunity to benchmark your own policies and position against your closest peer group.

Enjoy the read!

Stephen Briers, group editor, *Fleet News*

Sign up to our newsletters to stay informed about the fleet sector, including the latest news, interviews and advice on fleet management

LINKEDIN UK fleet managers group **X (formerly TWITTER)** X.com/_FleetNews
EMAIL fleetnews@bauermedia.co.uk **COMMENT ONLINE** fleetnews.co.uk

CONTACT US

***Fleet News*, Media House, Lynch Wood, Peterborough, PE2 6EA**

EDITORIAL

Group editor
Stephen Briers 01733 468024
stephen.briers@bauermedia.co.uk
News editor
Gareth Roberts 01733 468314
gareth.roberts@bauermedia.co.uk
Features editor
Andrew Ryan 01733 468308
andrew.ryan@bauermedia.co.uk
Content editor – vehicles
Matt de Prez 01733 468277
matt.deprez@bauermedia.co.uk
Content editor – B2B
Tim Keogh
tim.keogh@bauermedia.co.uk
Head of digital
Jeremy Bennett 01733 468655
jeremy.bennett@bauermedia.co.uk
Managing editor, B2B
Mike Roberts
mike.roberts@bauermedia.co.uk
Contributors
Sarah Tooze, Jonathan Manning
Photos **istock**

PRODUCTION

Head of publishing
Luke Neal
Production editor
David Buckley
Head of project management
Leanne Patterson
Project manager
Rosanna Readfern-Gray
b2bpm@bauermedia.co.uk

ADVERTISING

B2B commercial director
Sheryl Graham 01733 366467
B2B commercial manager
Kelly Crown 01733 366364
Key account directors
Emma Rogers 01733 979570
Account manager
Mark Wilde 01733 979341
Telesales/recruitment
01733 468275/01733 468328

EVENTS

Event director
Chris Lester
Awards director
Sandra Evitt 01733 468123
Event manager
Kate Howard 01733 468146
Senior event planner
Hayley Bradshaw 01733 979467
Exhibitions director
Katie Gordon-Hill 01733 468289

PUBLISHING

Group MD commercial
Nicola Bates
Publisher – automotive & transport
Holly Jerram
CRM & marketing manager
Lauren Annis 01733 468295

ISSN 0953-8526.

Electrification and home deliveries drive four-year growth for the UK's big fleets

Car, van and truck numbers all rise since the previous Fleet200 Strategy Report in 2021. *Stephen Briers* reports

261,505
number of vans operated by Fleet200

54,200
the UK's biggest fleet (Royal Mail)

26,553
number of trucks operated by Fleet200

350
three fleets share the final place (CBRE, Lyreco and The Modern Milkman)

In 2021, the last time *Fleet News* published an insight report into the trends and characteristics of the UK's largest fleets, we were still in the throes of Covid, we had yet to see a single China manufacturer enter the UK with a homegrown brand, the ZEV (Zero Emission Vehicle) Mandate was barely a twinkle in the (then Conservative) Government's eye and the plug-in car grant was alive and well.

OK, so the latter has since re-emerged as the electric car grant, underlining the prematurity with which its predecessor was scrapped, but in myriad other ways, the operating conditions facing fleet professionals have changed dramatically and comprehensively, as have their roles and responsibilities.

While there are variations in the companies responding to the two surveys 48 months apart (about the average length of fleet replacement cycles), there is a lot of commonality within the top 100: 69 companies feature in both. So comparisons can be made with a fair amount of relevance. Note, the 2021 list totalled just 126 companies.

The 2025 Fleet200 is operating 462,197 vehicles – 174,139 cars, 261,505 vans and 26,553 trucks – with a spread from Royal Mail's 54,200 to CBRE, Lyreco and The Modern Milkman, each with 350 vehicles.

The vast majority – 81% – are run by the top 100: 375,245 vehicles divided between 140,460 cars, 234,785 vans and 23,007 trucks. That proportion rises for vans to almost 90%, weighted by the likes of Royal Mail and BT whose combined van fleet accounts for more than half of the total, at 79,700.

There has been considerable growth among the UK's 100 biggest fleets; in 2021, they were running a comparatively modest 292,280 vehicles.

Growth has come from all three asset types: cars are up almost 74,000 units, vans by almost 60,000 and trucks by 6,000.

The reasons for this rapid expansion come down to taxation and consumer habits.

For cars, the transition to electric, with their very low benefit-in-kind (BIK) taxation rates, has sparked a revival in the company car, with cash allowance takers re-entering schemes in droves to enjoy the advantages of running high-tech models for a weekly outlay equating to about the same as a single frothy coffee.

Similarly, salary sacrifice has exploded in popularity, further underpinning the growth.

While van registrations have levelled off over the past couple of years, there was a post-Covid boom as demand for home deliveries grew exponentially. A revival in the construction market has also seen fleet sizes increase.

The top two fleets remain the same, as they have been ever since the first Fleet200 in 2010. Royal Mail added 3,740 vehicles (all vans and trucks – its leased car fleet has shrunk from more than 4,000 to just 1,500, but it has a further 1,400 on salary sacrifice) while BT is up almost 5,400 at 38,700 vehicles (although it has halved its truck fleet),

BT's fleet will contract in the coming years, as Openreach, which peaked in 2022 at around 33,000 vans and now accounts for 25,000 of the total, will further shrink as its work profile evolves from fitting fibre cables to servicing clients. By 2030, Openreach is likely to be running around 20,000 vans.

However, while the top two are unchanged, the rest of the top 10 has seen much transformation.

Four companies are new entrants, with the Ministry of Defence, which fleet manages a number of Government contracts, rising to third place with 11,800 vehicles, just ahead of Babcock, on 11,000. The latter also appeared in the 2021 list, but with just 1,300 vehicles.

Also new are The AA with 10,000 vehicles (2021: 2,585 – partly because its driving school numbers were not previously included) and National Grid on 8,000 (2021: 2,713 – the rise is both organic

FLEET200 BY NUMBERS

58.9
average van operating cycle (months)

9.4
average size of central fleet team

462,197
number of cars and vans and trucks in the Fleet200

35.5
average CO_2 of cars currently on order

47.8
average car operating cycle (months)

174,139
number of cars operated by Fleet200

THANKS FOR TAKING PART

Thanks to all the companies who supplied us with their fleet figures this year. Thanks also to Hilary Barden for collating the data and providing the tables for this report. If you believe your company should feature in the Fleet200, please email the group editor stephen.briers@bauermedia.co.uk

and due to the acquisition of Western Power Distribution, the UK's largest electricity distribution network).

Centrica, which was third in 2021 with 10,900 vehicles, has slipped to fifth, albeit with little change in its fleet size at 10,500.

Sharing 100th place this year are Belron UK and Worcester Bosch with 965 cars and vans, although they have mirror opposite fleets with Belron dominated by vans and Worcester Bosch cars.

Compare that with 2021, when Astra Zeneca was perched in 100th on just 447 vehicles, of which all but four were cars.

Arguably the most dramatic transformation over the past four years is fuel type.

In 2021, just 6.5% of cars were full electric, while almost 55% were diesel, resulting in average car emissions of 100g/km. Forward orders indicated the direction of travel, with almost 32% of cars full electric.

Today, 39% of fleet cars are full electric; diesel accounts for just 15.7%. And electric dominates the order books, at 55.4%, with plug-in hybrid taking 25.4% – an unexpectedly high percentage given the big hike in BIK tax rates due in 2028/29.

No surprise, then, that average CO_2 emissions have almost halved to 52g/km.

In addition, a quarter of fleets are now only ordering full electric cars (35 of the 139 who answered the question).

Correspondingly, the average emissions of forward orders is just 35g/km.

The figures underline the importance of company cars to the Government's ZEV Mandate aspirations; year-to-date registrations of electric cars sit at c22% of the total market, 17 percentage points behind fleet and six percentage points behind the 2025 ZEV Mandate target.

Electric light commercial vehicles follow a similar pattern, albeit at much lower levels.

Almost 12% of the 2025 Fleet200 van mix is full electric, up from 2.5% in 2021; forward orders sit at 23.7%.

They remain the biggest challenge facing fleet professionals, evidenced in their response to the future concerns question covered in detail on pages 12 and 13.

Nevertheless, 13 fleets (9% of those responding) are now only ordering full electric vans – Centrica, Vinci Fleet Services, Octopus Energy, Environment Agency, EDF Energy, National Highways, OVO Energy, DVSA, Eriks UK, Auditel, Carter Synergy, Center Parcs and North Ayrshire Council. Note, just three are public sector bodies.

Position	Company	Cars and vans total	Cars	Vans	Trucks	Car replacement cycle (months)	Van replacement cycle (months)	Car funding method	Van funding method
1	Royal Mail	48,200	1,500	46,700	6,000	48	84	L	OP/FL
2	BT	38,000	5,000	33,000	700	n/a	72	L	OL
3	Ministry of Defence	11,800	6,000	5,800	0	60	7	L	OL
4	Babcock	11,000	8,000	3,000	1,000	n/a	n/a	L	OL
5	Centrica	10,500	2,500	8,000	0	36	120	L	OL
6	DPD	10,277	277	10,000	2,078	n/a	n/a	n/a	n/a
7	The AA	10,000	7,000	3,000	0	n/a	36	L	FL
8	Network Rail	9,623	1,538	8,085	343	72	60	OP/L	OP/OL/FH
9	M Group Plant & Fleet Solutions	9,500	3,000	6,500	750	n/a	n/a	L	OP/OL/FL/FH
10	Mitie	8,500	3,500	5,000	0	60	60	L	OL
11	National Grid	8,000	3,000	5,000	256	n/a	n/a	L	OP
12	24x7	7,500	7,500	0	0	n/a	n/a	OP	n/a
=13	Balfour Beatty	7,000	4,000	3,000	800	48	48	L	OL
=13	Kier	7,000	5,000	2,000	500	36	36	L	OL/FH
=13	Vinci Fleet Services	7,000	4,000	3,000	2	48	60	OP	OP
16	Tesco	6,500	0	6,500	2,000	n/a	n/a	n/a	OP
17	Metropolitan Police	5,500	4,000	1,500	100	36	60	OP	OP
18	Octopus Energy	5,000	0	5,000	0	n/a	48	n/a	FH
19	Virgin Media	4,500	1,000	3,500	0	42	60	L	OL
20	VWG	4,292	4,292	0	0	6	n/a	n/a	n/a
21	Cadent	4,100	1,200	2,900	60	48	60	L	OP/FL
22	SSE	4,000	2,000	2,000	0	48	72	L	OL
23	John Lewis Partnership	3,700	1,500	2,200	700	36	72	L	OP/OL
24	Environment Agency	3,691	2,956	735	28	48	72	L	OP/OL
25	Siemens	3,500	3,000	500	0	48	48	n/a	OL

Key to funding method abbreviations: Cars – L Lease or OP Outright Purchase • Vans – OL Operating Lease, FL Finance Lease, OP Outright Purchase, FH Flexi Hire

Position	Company	Cars and vans total	Cars	Vans	Trucks	Car replacement cycle (months)	Van replacement cycle (months)	Car funding method	Van funding method
26	Kelly Fleet Services	3,440	150	3,290	50	56	60	OP	OP/FH
27	Alliance Automotive	3,250	250	3,000	25	36	60	OP/L	OP/FL
28	VolkerWessels UK	3,200	1,600	1,600	100	n/a	n/a	L	OL/FH
29	Police Scotland	3,142	2,470	672	30	n/a	n/a	OP	OP
30	Sureserve	3,120	120	3,000	0	48	60	L	OP/OL
31	UK Power Networks (Transport)	3,000	1,000	2,000	150	n/a	n/a	OP	OP
32	Morgan Sindall	2,900	2,500	400	10	48	60	OP/L	OP/OL/FH
=33	Amey	2,850	1,550	1,300	538	48	60	L	OL/FH
=33	Rentokil Initial	2,850	850	2,000	14	54	60	L	OP/OL
35	LKQ UK & Ireland	2,843	143	2,700	115	48	60	OP/L	OP/FL
=36	Anglian Water Services	2,800	800	2,000	1	48	48	L	OL/FH
=36	Galliford Try	2,800	2,300	500	120	n/a	n/a	OP/L	OP/OL/FL
=36	Johnson Controls	2,800	1,200	1,600	0	54	60	L	OL
39	Ocado	2,700	0	2,700	200	n/a	60	n/a	OL/FL
40	E.on UK	2,651	801	1,850	35	n/a	n/a	L	FL
41	Sky UK	2,600	600	2,000	4	n/a	n/a	OP/L	OP/OL/FL
42	Nurture Group	2,550	250	2,300	25	n/a	n/a	OP/L	OP/FL
43	Connells Group	2,500	2,500	0	0	60	n/a	n/a	n/a
44	United Utilities	2,280	80	2,200	230	48	96	L	OP/OL/FH
=45	EDF Energy	2,200	500	1,700	0	48	48	L	FL
=45	RAC	2,200	200	2,000	67	48	60	L	OL
47	Xerox	2,020	2,000	20	0	48	48	L	FL
48	Sanctuary Group	2,000	350	1,650	0	48	84	OP	OP/FL/FH
49	PHS	1,950	350	1,600	110	48	60	L	OL
=50	CEF	1,900	1,400	500	12	48	48	OP/L	OL

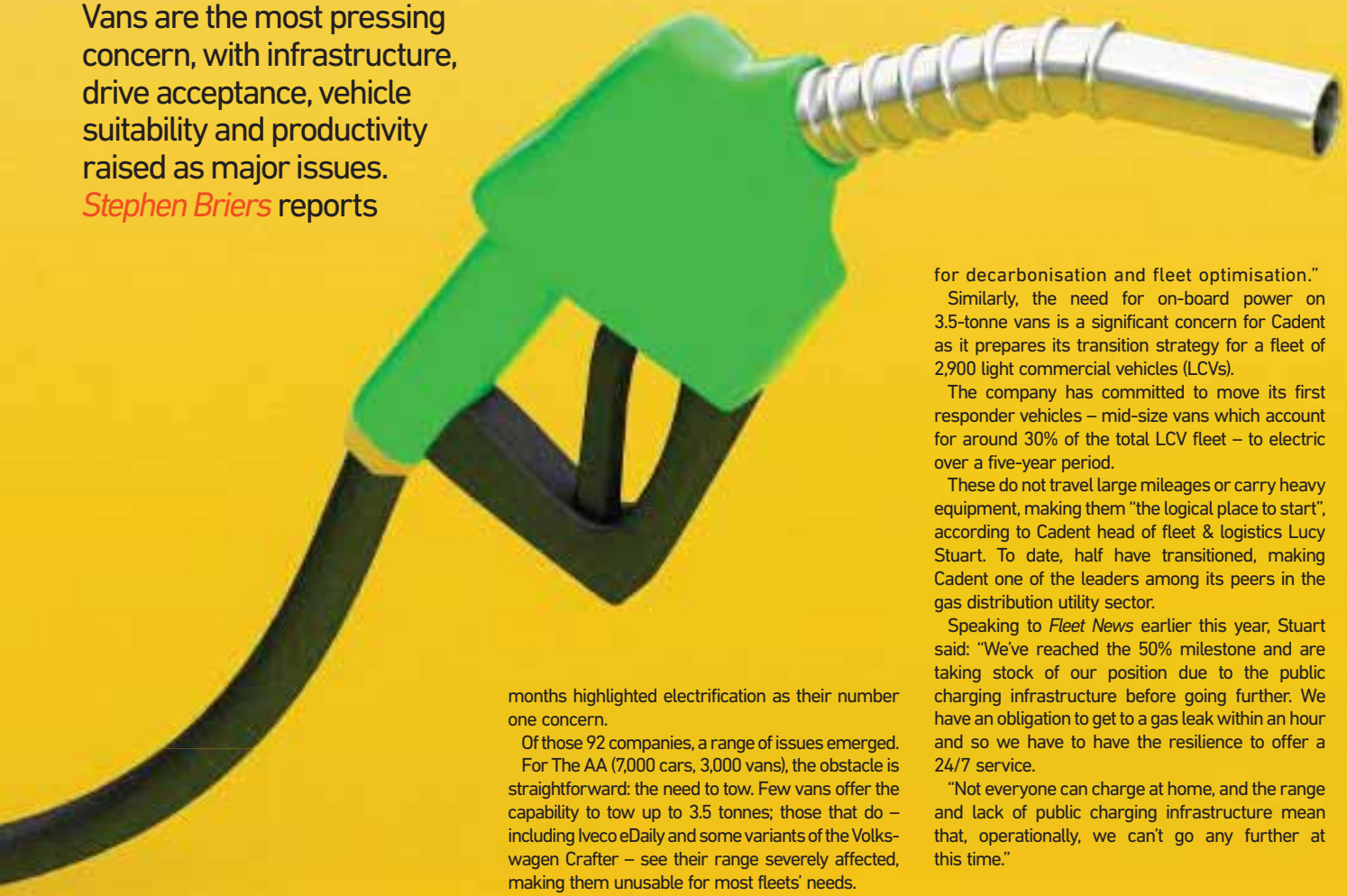
Position	Company	Cars and vans total	Cars	Vans	Trucks	Car replacement cycle (months)	Van replacement cycle (months)	Car funding method	Van funding method
=50	G4S	1,900	1,400	500	400	48	60	L	OL
=50	Select Plant Hire	1,900	1,600	300	0	n/a	n/a	L	FH
=53	Murphy Plant	1,850	850	1,000	60	48	72	L	OP
=53	Wates	1,850	900	950	0	48	72		FL
55	DHL Express	1,840	440	1,400	320	n/a	n/a	L	OL
=56	Costain	1,800	1,250	550	15	n/a	n/a	OP/L	OP/OL/FH
=56	Iceland Foods	1,800	0	1,800	350	n/a	72	n/a	OL
=56	ISS	1,800	600	1,200	0	48	60	L	OL
=56	Scottish Water	1,800	500	1,300	120	48	94	L	OP/FH
=60	Halfords	1,700	800	900	0	48	60	L	OL/FH
=60	Kindertons	1,700	1,500	200	0	24	24	n/a	OL
=62	Morrisons	1,600	0	1,600	0	n/a	60	n/a	FL
=62	Skanska UK	1,600	1,300	300	0	48	48	L	OL/FH
=62	South West Water	1,600	200	1,400	65	48	108	OP/L	OP/OL/FH
=62	Stark Building Materials UK	1,600	1,200	400	400	48	60	L	OL
66	South Central Ambulance Service	1,550	1,200	350	0	60	60	L	OP/OL
=67	Ministry of Justice	1,500	1,000	500	100	84	72	OP/L	OP/OL
=67	Schneider Electric	1,500	1,200	300	0	n/a	n/a	L	OL
69	Speedy Services	1,485	635	850	243	n/a	n/a	L	OL
70	National Highways	1,475	975	500	600	36	36	OP/L	OP
71	NG Bailey	1,450	750	700	25	48	48	OP/L	OP/OL/FH
72	Places for People	1,407	307	1,100	0	36	60	L	OL
73	Red Driver Training	1,350	1,350	0	0	n/a	n/a	OP/L	n/a
74	Marlowe Environmental Services	1,346	575	771	8	n/a	n/a	L	OL
75	Northumbrian Water Group	1,343	243	1,100	60	36	84	L	OL

Key to funding method abbreviations: Cars – L Lease or OP Outright Purchase • Vans – OL Operating Lease, FL Finance Lease, OP Outright Purchase, FH Flexi Hire

Position	Company	Cars and vans total	Cars	Vans	Trucks	Car replacement cycle (months)	Van replacement cycle (months)	Car funding method	Van funding method
76	GSF Car Parts	1,328	28	1,300	0	n/a	n/a	OP	OP/FL
=77	Lanes Group	1,300	300	1,000	1,000	n/a	n/a	L	FL
=77	West Midlands Police	1,300	1,200	100	25	48	84	OP	OP
79	Bill Plant Driving School	1,240	1,240	0	0	32	n/a	L	n/a
80	Telent Technology Services	1,210	700	510	0	n/a	n/a	L	OL/FH
81	Axis Europe	1,202	127	1,075	0	n/a	n/a	L	OP/OL/FL
=82	Electricity North West	1,200	400	800	70	n/a	n/a	L	OP
=82	Southern Water	1,200	200	1,000	0	60	60	L	FL
84	Coca-Cola	1,182	1,020	162	0	48	48	L	OL
85	Holcim UK	1,180	580	600	300	n/a	n/a	L	OP/FL/FH
86	Bowmer and Kirkland	1,150	800	350	0	48	60	L	OP/OL
=87	Avon and Somerset Police	1,100	850	250	15	84	120	OP	OP
=87	Beko Europe	1,100	200	900	0	n/a	n/a	n/a	n/a
=87	Huws Gray	1,100	800	300	0	48	60	OP	OP
=87	MV Kelly	1,100	200	900	0	36	30		OP
91	Kent Police	1,090	840	250	1	n/a	n/a	OP	OP
92	Arcus FM	1,030	30	1,000	0	48	60	L	OL
93	Briggs Equipment UK	1,025	325	700	200	n/a	n/a	OP/L	OL/FH
=94	Altrad Services	1,000	200	800	90	48	48	OP/L	OL
=94	Capita	1,000	700	300	50	n/a	n/a	L	OL
=94	Evri	1,000	200	800	1,400	48	36	n/a	OL/FH
=94	Foxtons	1,000	1,000	0	0	48	n/a	n/a	n/a
=94	HMRC	1,000	850	150	3	n/a	n/a	OP/L	OP
=94	Veolia	1,000	600	400	2,000	n/a	n/a	L	OP/OL
100	Clarion Housing Group	980	80	900	0	48	60	L	OP/OL/FH

Electrification tops the list of challenges facing UK fleets

Vans are the most pressing concern, with infrastructure, drive acceptance, vehicle suitability and productivity raised as major issues. *Stephen Briers* reports



Registration figures for battery electric vehicles (BEVs) are surging: eight months into 2025, electric car sales were up almost 30% to take a 21.9% share of the market. It is easy, therefore, to assume that fleets have electrification cracked.

Not so, according to the professionals leading the UK's largest fleet operators. Especially when it comes to vans.

While electric vans hit a record 13% market share in August, across the whole year, they sit at a little more than 9%. Yes, that's up from 5% the previous year, but fleets point to lack of availability of fit-for-purpose vehicles and charging infrastructure as ongoing blockers.

Consequently, the UK is lagging far behind the 2025 ZEV (Zero Emission Vehicle) Mandate target which requires 16% of total van registrations to be electric.

Almost 65% of fleets from the 143 who responded to the question about challenges for the next 12 months highlighted electrification as their number one concern.

Of those 92 companies, a range of issues emerged.

For The AA (7,000 cars, 3,000 vans), the obstacle is straightforward: the need to tow. Few vans offer the capability to tow up to 3.5 tonnes; those that do – including Iveco eDaily and some variants of the Volkswagen Crafter – see their range severely affected, making them unusable for most fleets' needs.

"EVs aren't as advanced as we need them to be for towing," says The AA fleet director Duncan Webb.

James Rooney, head of road fleet at Network Rail, the UK's eighth largest fleet with 9,623 vehicles, of which just more than 8,000 are vans, also points to constraints when it comes to electrifying welfare vans, due to their additional drain on charge.

"Over the next 12 months, our fleet faces a significant challenge in the continued roll-out of charging infrastructure and vehicle technology," Rooney says.

"While progress is being made, we are still encountering obstacles – particularly around the conversion of small vans to electric, and we are only at the early stages of tackling welfare vehicles. These areas present practical and operational complexities we are actively working to resolve."

He adds: "In parallel, this is a milestone year for procurement. With several key tenders under way, we have the opportunity to select new partners who can help accelerate our transition, bring innovation, and support our long-term goals for decarbonisation and fleet optimisation."

Similarly, the need for on-board power on 3.5-tonne vans is a significant concern for Cadent as it prepares its transition strategy for a fleet of 2,900 light commercial vehicles (LCVs).

The company has committed to move its first responder vehicles – mid-size vans which account for around 30% of the total LCV fleet – to electric over a five-year period.

These do not travel large mileages or carry heavy equipment, making them "the logical place to start", according to Cadent head of fleet & logistics Lucy Stuart. To date, half have transitioned, making Cadent one of the leaders among its peers in the gas distribution utility sector.

Speaking to *Fleet News* earlier this year, Stuart said: "We've reached the 50% milestone and are taking stock of our position due to the public charging infrastructure before going further. We have an obligation to get to a gas leak within an hour and so we have to have the resilience to offer a 24/7 service.

"Not everyone can charge at home, and the range and lack of public charging infrastructure mean that, operationally, we can't go any further at this time."

GOVERNMENT CRITICISED

Fleet are critical of the Government's ZEV Mandate targets which jump to 46% of van registrations in 2028. Electrifying anything other than a basic 'box on wheels' is causing consternation.

Speaking at the recent Association of Fleet Professionals (AFP) Expo, joint vice-chair and head of fleet at Altrad Matt Hammond highlighted the dropsides, cherry pickers and tippers of the van world, as well as those with towing duties, as being overlooked by Government regulation.

Meanwhile, PHS (350 cars, 1,600 vans) drew attention to the uncertainty surrounding the 4.25-tonne electric van derogation rules, which were introduced in 2018 to allow for the additional weight of batteries in zero-emission vehicles, ensuring they can still carry a comparable payload to their lighter combustion-engine equivalents.

The derogation permits drivers with a standard Cat-B car licence to drive these vehicles to transport goods within a 62-mile radius of the main base,

and while they no longer have to do the additional five hours of training, 4.25-tonne electric vans are still subject to truck rules on the use of tachographs and SMR regimes.

Consequently, for operators without an O-Licence, the rules are still too restrictive to allow their use.

PHS fleet manager John Hole says his biggest issue is "getting the UK Government to change the rules around 4.25t EV – it's stopping major progress in EV adoption in the 3.5t sector of our fleet".

Even those who have made the greatest progress on converting their vans to electric point to decarbonisation as their greater challenge.

One third of Centrica's vans are electric, while its entire order book is zero emissions, yet, director, fleet operations Rob Simister concedes that BEVs remain "harder to deliver and make operational to release the value in the assets".

Rather more candid is Marcus Dann, fleet service manager at EDF Energy, who states that in many instances "electric vans are not fit for purpose".

Despite these challenges, EDF has already transitioned a quarter of its 1,700 vans to electric, while, like many utility companies, it is now only ordering electric vans.

Dann's view is shared by Northumbrian Water Group (NWG) fleet services manager Kate Wilson. Just 5% of her 1,100 vans are electric, although the order book is split 50-50 between electric and diesel.

Nevertheless, she is contending with "fleet transition in a commercial EV market that isn't ready", while also having to accommodate NWG's seven-year replacement cycle.

Electrification, while the primary challenge facing fleets over the next 12 months, is not the only issue causing concern, however.

Perennial themes such as reducing collisions and cost control remain the biggest challenge for some operators. Again, the primary focus tends to be on vans.

The lack of a used market for electric cars is cited by a number of fleet professionals who point to the negative impact it is having on residual values. The knock-on effect is a rise in leasing rates, at a time when costs in all areas are under pressure.

As Andrew Pace, UK group fleet manager at Arriva (350 vans, 100 cars), says: "This restricts driver choice and hampers our transition to EVs."

Additional strain on leasing rates is coming from high interest rates compared with when vehicles were last replaced three or four years ago.

This is also affecting choice lists, with Bowmer and Kirkland (800 cars, 350 vans) reflecting on the difficulties of "giving the options to drivers keeping equivalent cars to ones replaced four years ago".

> "NOT EVERYONE CAN CHARGE AT HOME, AND THE RANGE AND LACK OF PUBLIC CHARGING INFRASTRUCTURE MEAN THAT, OPERATIONALLY, WE CAN'T GO ANY FURTHER AT THIS TIME"
>
> **LUCY STUART, CADENT**

And that's if you can even get the cars required for specific roles, with several police forces, including both Avon and Somerset Police and Staffordshire Police, raising concerns about vehicle availability.

Fleets are also juggling the aftermath of Covid supply restrictions with the rising cost of leasing, with HSS (350 cars, 500 vans) stating that its biggest challenge is the "financial investment to replace ageing vehicles".

REDUCING INCIDENTS

Incidents are under the microscope for 5% of the Fleet200, whether that is reducing rates (Saint-Gobain, SSE, Royal Mail) or better management post-crash (DX Network Services).

Ultimately, though, the spotlight returns to electrification as the prevailing challenge facing fleets. Infrastructure, cost, willingness of drivers to embrace the new tech are all obstacles, but productivity is a glaring red flag for many.

As Arcus FM (30 cars, 1,000 vans) national fleet manager Ryan Mills highlights, the issue for those providing essential business services or deliveries is "the impact (that transitioning to EV has) on productivity in a mobile service delivery business where vans are return to home, with a 50/50 split on drivers with and without off-road parking who are capable of a home charger install".

Branding Britain's Fleets

Please call our award winning team to discuss your fleet branding requirements.

mediafleet
delivering your brand

Tel: 01993 772 525

www.mediafleet.co.uk

Branding Britain's Fleets

COMPANY CAR AND VAN
2024
Car of the Year
CITROËN
ë-C3

New Citroën ë-C3

Car of the Year 2024

Discover
New Citroën ë-C3

3% BIK
Electric range up to 199* miles
P11D price from £22,030

*Fuel economy and CO2 results for the New Citroën ë-C3 83kW with 44kWh battery. Mpg (l/100km): N/A. CO2 emissions: 0g/km. Electric range up to 199 miles (WLTP Combined).

The range and electric consumption figures mentioned comply with the WLTP test procedure, on the basis of which new vehicles are type approved from 1 September 2018. They may vary depending on actual conditions of use and on different factors such as: speed, thermal comfort on board the vehicle, driving style and outside temperature. The charging time depends in particular on the power of the charger on board the vehicle, the charging cable and the type and power of the charging station used.

CITROËN

How many 'squad members' does it take to run a successful fleet?

For the Fleet200, it averages at 9.4 people, or one head per 344 vehicles. *Stephen Briers* reports

It sounds like the start of a hackneyed joke: how many fleet managers does it take to run a fleet? But for many operations, struggling with resource and under increasing pressure from data overload, juggling a bewildering explosion of brand options and accelerated learning of new skills – from devising a workplace charging strategy to addressing mental health issues – it's no laughing matter.

So let's make a slight amendment: how many fleet managers *should* it take to run a fleet?

The answer, of course, varies dependent on the genre of fleet you manage: the type of assets, the funding option, the level of in- and outsourced functions, job-critical versus user-chooser vehicles – each comes with different levels of responsibility and complexity.

The Fleet200 provides the perfect benchmark to compare fleet departments across business segment and asset type.

On average, they employ 9.4 people, which equates to one fleet head for every 344 vehicles. Note this relates to central fleet teams and does not include internal workshop staff.

At a rudimental level, the larger the fleet, the more people it takes to manage. There are outliers, particularly user-chooser car fleets which outsource a large amount of their day-to-day management to leasing partners. They have much smaller central teams.

The most extreme example is a tech firm in the housing market. Its 2,800 leased vehicles – 1,200 cars and 1,600 vans – are managed by a solitary person.

Run more than 1,000 vehicles and you should be part of a team of 13. Economies of scale appear to apply for these mega fleets with one head per 480 vehicles, the highest average across the three segment sizes analysed.

Interestingly, just nine of the top 20 biggest fleets in the country actually have at least 13 people in the fleet team, although three companies known to have sizeable departments – Royal Mail, Balfour Beatty and Metropolitan Police – declined to provide figures.

Put another way, eight of the 20 biggest UK fleets have fewer than 13 people running their vehicle operations.

On average, it takes a team of seven to run fleets of 500-999 vehicles, equating to one person for every 231 vehicles.

For fleets with 100-499 vehicles, the department size drops to 3.2 people, although they are also managing the fewest vehicles per head at just 199.

However, digging deeper reveals more variation centred around funding method.

Fleets who buy vehicles outright tend to have more people within their teams compared with those who use a leasing company, where the contract is likely to involve a number of outsourced services.

On average, outright purchase companies have 15 people in their fleet team, with a vehicle-to-staff ratio of 235. This rises to 19.5 per team for fleets operating 1,000-plus vehicles, or one employee per 350 vehicles; most of those are running more vans than cars.

Generally, the smaller the fleet, the fewer the heads and the lower the number of vehicles managed per head. The paradox is the 500-999 category, where each head is responsible for just 103 vehicles.

However, this category of 16 fleets includes four police fleets, which have larger fleet teams of between 22 and 35 people, skewing the average.

Remove them, and the other fleets are running 131 vehicles per head, from teams of 6.6 people.

In contrast to the outright purchase fleet figures, leased fleets employ just eight fleet people on average, or one person per 381 vehicles.

Again, isolating the very largest fleets, those with 1,000-plus vehicles, reveals a higher headcount, at 11 people, equating to one for every 539 vehicles.

Sitting bang on that average is National Grid, which has 11 people in its fleet team, albeit some resource is shared and some dedicated across its National Grid and Western Power Distribution operations.

For example, four procurement heads and a safety and compliance member of staff work across the fleet, but National Grid also has its own car fleet manager and operations lead.

Head of fleet Lorna McAtear, who joined the business six years ago, has seen the team expand, including the additional of a member of the commercial vehicle team to manage O-licences when they were brought back in house after the collapse of Rivus.

"The safety and compliance role was also new after a company realignment which saw some roles move from central teams into departments," McAtear adds.

The spread of central fleet teams ranges from just three overseeing a four-figure public sector fleet, which relies heavily on outsourced fleet management support, to 50-plus across several police and ambulance services, as well as complex van and plant fleets with multiple build requirements.

These fleets also tend to be outright purchased, necessitating finance and procurement roles within the team. Many also operate workshops with controllers and managers employed within the central team.

The Fleet200 results echo recent analysis by the Association of Fleet Professionals (AFP), which surveyed its members on the same topic, in terms of broad trends, although the headcount numbers were generally lower in the AFP's study. It also highlighted the diversity of the fleet manager role and the difficulty in applying a single formula for headcount based on car and van numbers.

AFP published staffing averages for four fleet sizes across a broader vehicle spread than the Fleet200 which focuses solely on the UK's largest operators.

- For mega fleets with more than 1,000 vehicles, the average number of full-time employees was 5.25 for external funding and 12.25 for outright purchase.
- For large fleets of 500-1,000 vehicles: 3.55 funded and 8.25 outright purchase.
- For a medium fleet of 100-500 vehicles: 1.32 funded and 1.75 outright purchase.
- For small fleets of 100 vehicles or fewer: 0.83 funded and 1.00 outright purchase.

A key takeaway from the Fleet200 and AFP results is the high level of productivity that fleet teams are delivering, particularly among the larger operations.

While they have more heads, there is also the need for more skillsets. And when considering the growing need for data analysis to manage the business intelligence tools and information flowing in from multiple sources, including telematics, insurance, licence checking and incident reporting, it is evident that many fleets remain under-resourced.

AFP points to the figures for 100-500 vehicle fleets. Here, typically two or three staff look after an asset base that could easily be valued at £10 million or more, managing maintenance budgets measured in six figures, and delivering essential daily transport without which there is a good chance their businesses would grind to a halt.

Similarly, mega fleets with thousands of vehicles operated across the whole of the UK by some of the country's largest organisations typically are being run by five-20 people, managing budgets running into tens of millions of pounds.

"As you would expect, the difference in the way every fleet in the UK runs based on business leadership, culture, ESG passion and insource versus outsource is hugely varied, even comparing companies that would view each other as competitors," says Paul Hollick, chair at the AFP.

"What is obvious is that if fleets insource operations and are running complex HGV/LCV fleets with specialist equipment, there is a requirement to have a larger team.

"Universally though, strategy and procurement tend to sit in-house and fleet employee sizes are gradually becoming larger as the complex topic of decarbonisation gives fleet directors more responsibility and airtime at Board level."

He adds: "Measured in terms of a return on investment, their contribution to their organisations is, we believe, staggering. Indeed, the bigger the fleet, the bigger the value generated, it appears."

LEASED FLEETS

Fleet size	Average size of team	Vehicles per head
1,000-plus	11	539
500-999	6	254
100-499	2.6	210

OUTRIGHT PURCHASE FLEETS

Fleet size	Average size of team	Vehicles per head
1,000-plus	19.5	350
500-999	12	103
100-499	5.4	146

Source: Fleet200 Strategy Network 2025

> "MEASURED IN TERMS OF A RETURN ON INVESTMENT, THEIR CONTRIBUTION TO THEIR ORGANISATIONS IS, WE BELIEVE, STAGGERING. INDEED, THE BIGGER THE FLEET, THE BIGGER THE VALUE GENERATED, IT APPEARS"
>
> **PAUL HOLLICK, AFP**

Fuel cards

for fleets of all sizes.

We have a range of fuel cards for fleets of all sizes designed to meet the different needs of our customers.

Find out more

Benefits of bp Fuel Cards

Minimise risk of fraud
Each card has individual PINs and alerts flag unusual card use.

Complete energy partner
bp is fuelling mixed-energy fleets with traditional fuels, as well as secure, lower lifecycle carbon energy options to meet the different needs of our customers.

Motorway coverage
Extensive coverage of motorway fuel sites in the UK.

Comprehensive fleet tools
Control cards, access VAT approved invoices and customised reports through one online portal.

Advanced performance fuel
bp Ultimate with ACTIVE technology, helps keep vehicles performing at their best and running smoothly and efficiently.[1]

Power for EV fleets
Access a network of ~53,000 EV charging points in the UK with our partners charge network – including over 3,000 rapid and ultra-fast charge points on the bp pulse network.

bp Fleet Solutions

[1]Benefits achieved over time and may vary based on factors including vehicle type, condition and driving style. See bp.com/ultimate

GEOTAB®

Turning Data into Fleet Strategy

Geotab, a global leader in connected vehicle solutions, provides a secure and high-availability platform that empowers fleet to make strategic decisions based on actionable data insights. Backed by a team of industry-leading data scientists, engineers and AI experts, over 100K customers worldwide trust our solution to help them address their critical operational challenges.

Enhancing Driver Safety and Compliance

Safety teams can better protect their drivers with our customisable and expandable fleet safety solutions. Managers are supported from monitoring trends and benchmarking driver performance, to implementing parking aids and delivering real-time coaching based on risky behaviours identified by AI-powered dash cameras. Our actionable safety data informs effective risk-reduction strategies, allowing teams to actively monitor their impact on the fleet's risk score and predict the number of future collisions.

Geotab's compliance software processes over 100 billion data points and extracts the pertinent insights, streamlining workflows so that instead of spending time trying to collate information, teams can instead spend their time actively improving compliance with customer SLAs, trade union requirements and the working time directive. The software is also fully customisable to align with diverse policies and vehicle-specific requirements to ensure each vehicle is safe to drive every time.

Driving Operational Efficiency and EV Adoption

Geotab's platform enhances operational efficiency by integrating fleet management with advanced routing and scheduling solutions. This leads to optimised routes and reduced travel times, ensuring drivers prompt arrival at job sites.

Geotab's data-centric approach provides fleets with a feasible and financially justified roadmap for a responsible transition to electric vehicles (EVs). We achieve this by analysing your fleet's data to understand which internal combustion engine (ICE) vehicles could be phased out first, and offering right-sized replacements based on your operational requirements. Thanks to our specialist team of EV data engineers, our industry-leading eLCV data support helps you get the fastest ROI and greatest operational performance out of your new investments.

Proactive Vehicle Health

Unplanned downtime creates significant costs and service disruptions associated with having a vehicle off the road, Geotab's rich engine data and AI-powered insights are critical tools to proactively optimise vehicle health and reduce the risk of vehicles being off the road. Potential problems are predicted in advance by analysing hundreds of billions of data points from Geotab-connected vehicles to pick out patterns that have led to distinct failures in the past, potentially weeks before the potential failure occurs. This allows for timely maintenance to be scheduled, rectifying these faults before they develop into larger problems.

Global Data Intelligence, Supported Locally

Through our trusted reseller network, we provide our customers with global data intelligence, backed up by local support and expertise. This enables us to consult on your global safety, compliance and sustainability strategies, while being there to ensure that local fleet operations run cost effectively and coherently.

infouki@geotab.com | www.geotab.com/uk

Car funding contrast between public and private sector fleets

Interest grows in alternatives to outright purchase and leasing. *Gareth Roberts* reports

Just one-in-five fleets (20%) takes a blended approach to funding their cars, according to responses to this year's Fleet200 survey.

That's a five percentage points reduction on the one-in-four fleets that used more than one funding method for their cars four years ago.

Many experts assert that potential savings gained by introducing different types of funding to cater for a fleet's individual needs – blended funding – can bring considerable benefits that make any increased admin burden worthwhile.

However, the extent to which different funding methods work best as part of a blend will change from time to time dependent on a range of factors.

These can include tax changes, funding terms, car choices and mileage profiles.

The Fleet200 survey shows almost a third (31%) of fleets are using outright purchase to acquire some of the cars they operate, with almost a fifth (18%) of the cars operated by Fleet200 members funded in this way.

However, this differs significantly when public and private sector Fleet200 fleets are viewed in isolation.

Two-thirds (66%) of public sector fleets use outright purchase, with more than half (55%) of their cars funded in this way, while just a quarter (24%) of private sector fleets use the funding method for 11% of their cars.

Compared with four years ago, when Fleet200 members were last surveyed, the proportion of fleets using outright purchase has decreased marginally, from just more than a third (35%) in 2021, while the percentage of cars obtained via outright purchase has remained fairly static (17% in 2021).

Leasing remains the dominant funding choice for Fleet200 members, with more than three-quarters (76%) funding some of their cars in this way in 2025, compared with 87% in 2021.

The decline has been fuelled by an increase in fleets choosing other ways of funding their cars, such as flexible rental.

More than two-thirds (70%) of the cars on the Fleet200 combined fleet are leased, compared with more than three-quarters (78%) in 2021.

As the outright purchase data has already shown, leasing is not as widely used in the public sector as it is with private companies.

More than four-in-five (81%) private sector fleets lease some of their cars, accounting for three-quarters (76%) of cars, compared with just more than half (53%) of public sector fleets using the funding method to acquire 38% of their cars.

The increasing proportion of fleets employing other ways of funding their cars – from 5% in 2021 to 16% this year – suggest fleets are looking for greater flexibility.

Ogilvie Fleet recently launched a 90-day-plus rental product designed to provide customers with greater flexibility when choosing fleet vehicles.

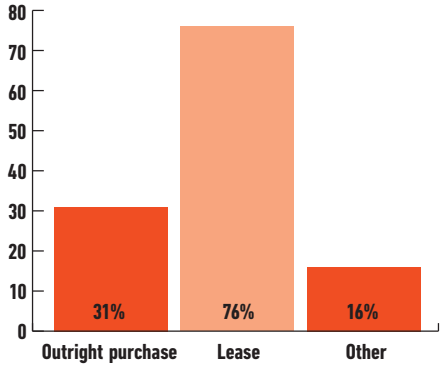
It says this allows businesses to better manage costs such as benefit-in-kind (BIK) tax, insurance policies and operational requirements.

Ian Bennett, rental director at Ogilvie Fleet, says customers are increasingly looking for "more flexibility when they provide employees with company vehicles".

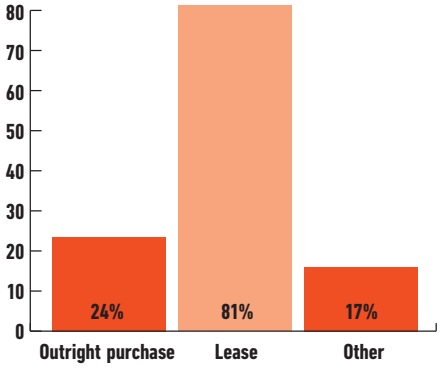
Neil McCrossan, managing director at Northgate, adds: "Unlike contract hire, where you're tied into a fixed term, flexible hire allows customers to rent vehicles for as little as one month and return them when no longer needed, without penalties.

■ *39 of the 200 fleets use multiple funding methods*

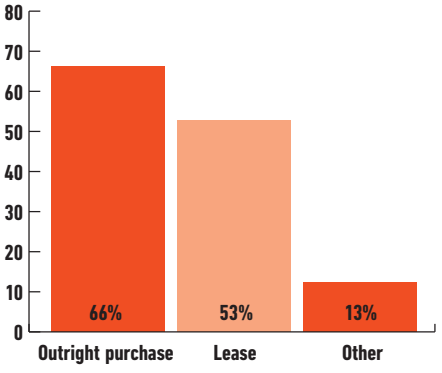
Percentage of operators using each funding method



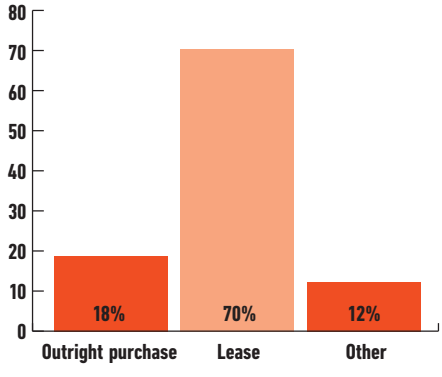
Percentage of operators using each funding method – private sector only



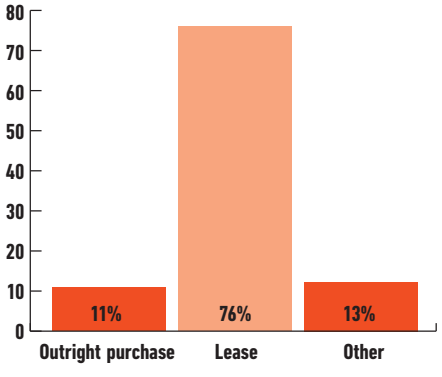
Percentage of operators using each funding method – public sector only



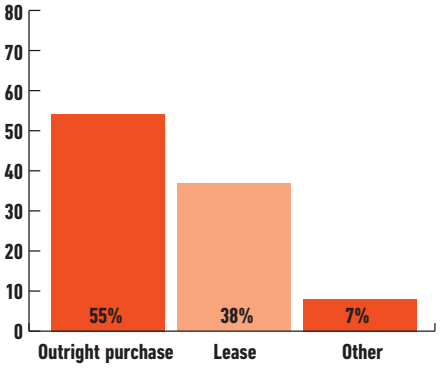
Proportion of Fleet200 vehicles funded by each method



Proportion of Fleet200 vehicles funded by each method – private sector only



Proportion of Fleet200 vehicles funded by each method – public sector only



Rapid transition establishes EV as the dominant car powertrain

Research shows that financial incentives and corporate sustainability targets have propelled EVs to displace diesel as the fleet fuel of choice. *Andrew Ryan* reports

Electrification has been one of the key focuses for fleets in recent years, and the Fleet200 research shows just how rapid the transition has been for cars.

In 2021, diesel was the dominant fuel and accounted for an average 68.3% of cars on Fleet200 fleets. Four years later this has dropped by more than 50 percentage points to 15.7%.

While petrol has remained relatively stable – 14.6% in 2025 compared with 16.6% in 2021 – the biggest increase has come through plugged-in electric vehicles (EVs).

In 2021, they accounted for an average proportion of 8.8%. By 2025, this had risen more than fivefold to 65.1% (38.9% full electric and 26.3% plug-in hybrid).

The increase has been driven by tax and financial incentives, corporate net zero targets and the increasing availability and capability of electric cars: they are no longer a niche product, with all major manufacturers offering a number of EV models.

A comparison with registration figures from the Society of Motor Manufacturers and Traders (SMMT) show the Fleet200 organisations are ahead of the new car market as a whole when it comes to EVs.

Figures for year-to-date (end of August) show the proportion of new car registrations which were fully-electric was 21.9%, PHEV 10.6%, hybrid 13.8%, petrol 48.1% and diesel 5.6%.

"As companies look to reinforce their ESG (Environmental, Social and Governance) agendas, the electrification movement continues to gather pace helped by advantageous tax breaks," says Andy Bruce, CEO of Fleet Alliance.

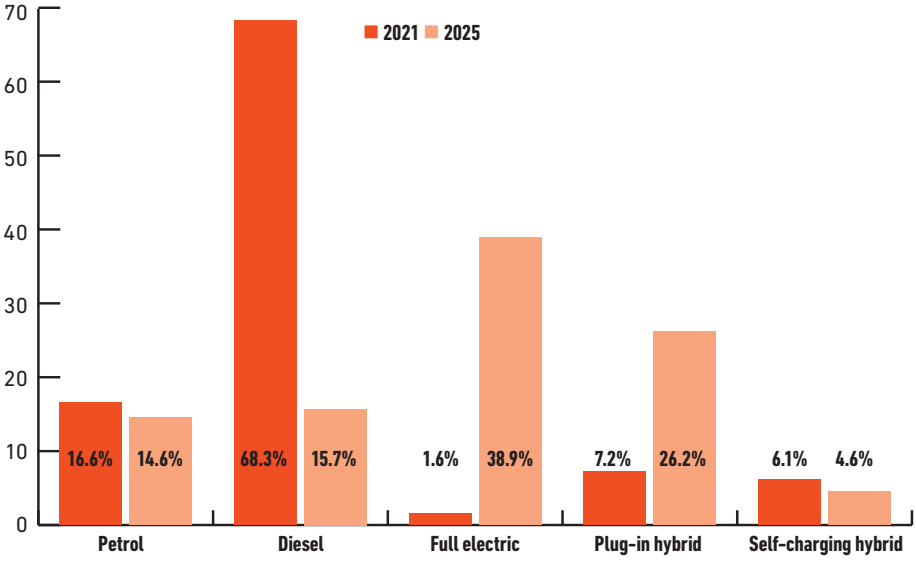
"A current rate of company car tax of just 5% by 2027/28 is a huge financial incentive for would-be company car buyers as well as providing certainty about future tax levels."

While the overall trend for a Fleet200 organisation is to electrify, there are huge differences in how far individual fleets are in their electrification journey.

While 4% of respondents said their car fleet was fully battery electric, 8% did not operate any BEVs.

Between these extremes, there is a widespread disparity. The biggest proportion (37%) have an average of 1%-to-25% of BEVs on their car fleet, 29% have between 26% and 50%, 12% have between 51% and 75%, with 11% having between 75% and 100%. In 2021, 43% of respondents had no BEVs, while the remainder said the zero emissions vehicles accounted for between 1% and 25% of their car fleets.

AVERAGE PROPORTION OF CAR FUEL TYPES ON FLEET



AHEAD OF SCHEDULE

One of the UK's major fleets whose electrification progress is ahead of the Fleet200 average is Vodafone UK, which expects its fleet of almost 1,000 company cars to be fully-electric by 2026, one year ahead of its own corporate schedule. In 2021 – soon after it launched its electrification strategy as part of a Vodafone Group – 16% of its car fleet were BEVs, with PHEVs accounting for 29%.

Together with leasing partner Arval UK, the company created a transition project which included ride-and-drive events, as well as webinars designed to educate employees on the advantages of BEVs. Topics included taxation, charging and range.

Petrol and diesel cars were removed from choice lists altogether in 2021, with PHEVs following in 2023.

"We have been pursuing a determined electrification strategy for our car fleet, driven by both our overall corporate environmental objectives and demands from drivers for zero emissions options," says Craig Login, property contract manager at Vodafone UK.

"We adopted a very structured approach to electrification, looking at everything from detailed wholelife cost modelling through to regularly meeting with manufacturers to ensure the latest

electric cars meeting our needs were available."

The company also launched a BEV salary sacrifice scheme in 2023, and the 300th vehicle was provided through this initiative in June this year.

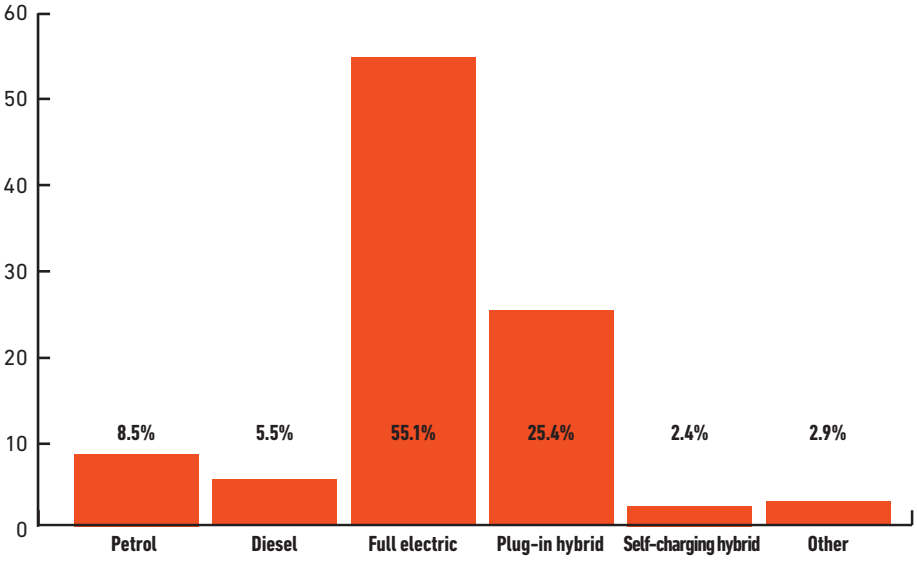
The progress made by Fleet200 organisations towards decarbonisation has seen the average fleet CO_2 fall by more than half since 2021. It now sits at 52g/km, down from 109g/km.

Once again, there is a wide disparity in the CO_2 averages among individual fleets: the lowest has 0g/km, while the highest has 140g/km. Three-in-five fleets (60%) reported emissions below the overall average.

The research shows the average fleet emission will continue to fall, with the average CO_2 of the cars on order being 36g/km.

More than three-in-five respondents (64%) reported average CO_2 emission orders below this number.

AVERAGE PROPORTION OF FUEL TYPES ON ORDER



The Fleet200 research found fully-electric cars accounted for an average of 55.1% of orders, with plug-in hybrids at 25.4%. Almost a quarter (24%) of respondents were solely ordering fully-electric cars.

However, 13% of fleets had not ordered any BEVs, 12% had ordered an average of 1%-25%, 29% had ordered an average between 26% and 50%, 12% had ordered between 51% and 75%, with BEVs accounting for 76%-to-100% of the order books of 32% of respondents.

The average proportion of self-charging hybrids on order is 2.4%, 2.2 percentage points lower than the average proportion currently on fleets.

The number of petrol and diesel cars operated by Fleet200 organisations will continue to fall in the future, with the research finding they accounted for an average of 8.5% and 5.5% respectively.

While there have been enormous strides forward in both the capability and availability of BEVs, they are not yet able to fill all requirements for job-need fleets, particularly those in the emergency services.

Richard Muirhead, director of commercial services at West Mercia Police says the current range of BEVs does not yet fulfil all of a police force's operational needs.

"There is an expectation among most of us that they will meet operational needs in the foreseeable future, possibly in only a year or two," he says.

"It is very much around the range and the speed at which you can recharge the vehicle. Then there is an issue with the top speed of EVs.

"They tend to only go up to 112mph which is plenty fast enough for most of us, but officers on some jobs go well beyond those speeds."

- UP TO 441 MILE WLTP RANGE*
- 10-80% CHARGE IN 17 MINS^
- 3% BIK

MG IM5 FROM £39,385

im.mg.co.uk/im5

*Range figures provided are calculated under test conditions. Figures are for comparative purposes only and may not reflect real-life driving results. Actual range may vary depending on various factors such as weather conditions, driving styles, vehicle load, and accessories fitted post-registration. ^10-80% charging time applies to MG IM5 100 Long Range and 100 Performance using a 350kW Ultra-Fast charger under standardised test conditions. Charging times in real world conditions will vary dependent on a number of factors, including but not limited to the age of battery, charging conditions, temperature and the existing charge of the battery, charger used and duration of charge. Charging times will be increased when using chargers of a lower capacity. Availability of 350kW-capable chargers may be limited dependent on location.

Replacement cycles are extended following four years of challenges

Impacts of Covid-19 pandemic still being felt – especially in used market. *Matt de Prez* reports

Fleet operators are replacing their cars, on average, every 48 months, according to the latest Fleet200 data. It marks an extension on the 46 months recorded in 2021.

However, while cars are being kept on fleets for longer, mileages are reducing.

In 2025, the UK's 200 largest fleets are replacing their cars after an average of 74,000 miles. In 2021, the average replacement mileage for cars was 81,000 miles.

The changes come after the Covid pandemic and show that British workers continue to embrace flexible and remote working opportunities.

The shortest replacement cycle recorded in the latest Fleet200 survey was from VW Group, which operates an employee car ownership scheme (ECOS). Vehicles are renewed every six months or 7,000 miles. In 2021, the same fleet operated a six month or 9,000 miles replacement cycle.

Veezu, meanwhile, operates the longest replacement cycle in the survey. The taxi and ride-sharing firm keeps its cars for 84 months or 200,000 miles.

Among the top 10, the average replacement cycle is slightly longer, at 55 months and 100,000 miles. The UK's largest fleet – Royal Mail – operates a 48-month or 100,000-mile replacement cycle for cars.

One of the major challenges faced by fleets during the past four years was vehicle availability. After car factories were forced to close during the pandemic, the industry was then struck by a semi-conductor shortage. Coupled with growing demand for electric models, on the back of tax changes by Government, lead times for some new models were in excess of a year.

It's only in the past 12 months that new car lead times have normalised. As such, there has been a fall in the number of used cars available for sale between three and four years old (36-48 months).

Less than a quarter (23%) of the UK's used stock fell into this age bracket, while the volume of sub-two-year-old used stock has increased to a record high of 31%, according to the latest Indicata Market Watch report.

It says that the rise in stock aged 24 months or less was due to a growing number of nearly new electric vehicles (EVs) being fed into the used car market, while the lion's share of used stock (46%) is more than five years old.

"OUR USED VEHICLE DATA SHOWS JUST HOW LONG IT HAS TAKEN TO FLUSH THE IMPACT OF COVID THROUGH THE USED MARKETPLACE"

DEAN MERRITT INDICATA UK

"Our used vehicle data shows just how long it has taken to flush the impact of Covid through the used marketplace," explains Dean Merritt, Indicata UK's head of sales.

"Typically, 36-to-48-month-old used cars are at the sweet spot of both wholesale and consumer demand from an age, mileage and price perspective and currently demand is exceeding supply."

CAR REPLACEMENT CYCLES

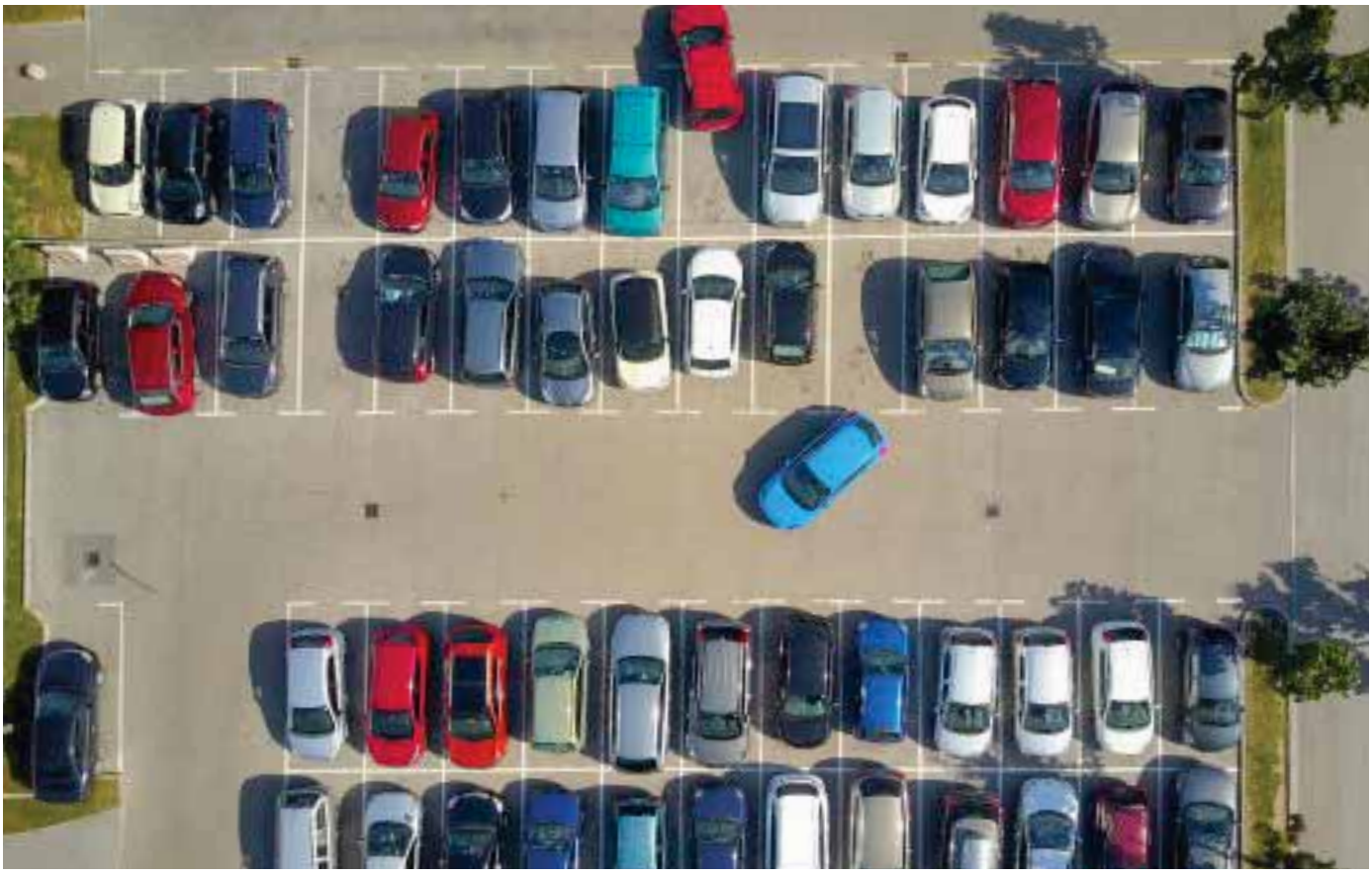
	Age (months)		Miles	
	2021	2025	2021	2025
Minimum	6	6	9,000	7,000
Maximum	120	84	150,000	200,000
Public sector average	51	51	86,000	90,000
Private sector average	45	47	80,600	70,500
Fleet200 average	46	48	81,157	73,668

TAX CHANGES PUT MORE PRESSURE ON FLEETS

From April, newly registered electric and zero-emission vehicles with a list price exceeding £40,000 are now subject to the standard road tax rate of £195, in addition to the 'expensive car supplement' of £425 a year.

Some operators will see their liability on widely-adopted EVs rise per vehicle from zero to £2,490 over a four-year period.

First year VED rates are being increased from zero to £10 for battery electric vehicles (BEVs) and from zero to £110 for PHEVs emitting between 1-50g/km of CO_2. Second year rates have risen more dramatically for BEVs – from zero to £195.



Furthermore, EVs costing more than £40,000 that are registered after April, are liable for the expensive car allowance, also dubbed the 'luxury car tax'.

The £425 fee applies annually for five years, starting from the first standard VED payment that is made when the car is a year old.

Simon Staton, client management director at Venson Automotive Solutions, says: "Strong public support for taxing EVs rubber-stamps the sentiments of UK motorists, who clearly feel it's only fair EV drivers contribute their share financially to improving our roads just like those driving ICE (internal combustion engine) vehicles.

"However, this level-headedness from UK drivers offers little comfort for the many businesses now facing an additional £620 per annum tax bill on many fleet EVs.

"While fleets have driven much of the EV transition to date, businesses are now having to grapple with these cost increases and their impact on whole-life costs. This could, in turn, force fleets to reassess their fleet strategies."

UPWARD TRAJECTORY

Staton says that if Government wants to maintain the upward trajectory of EV sales it needs to look after fleet.

"Indeed, it was welcome news to hear the rumour that the Government may consider raising the expensive car supplement threshold at a future fiscal event, which could help bring these costs down," he adds.

"In the meantime, however, businesses may well pause for thought before growing their EV fleet."

Andrew Leech, head of Mercia Fleet Management and founder of Fleet Evolution, adds: "We are in a very erratic market at the moment, with many businesses having to re-assess their fleet strategies from two viewpoints.

"First, fleet managers are looking at the timing of the replacement of their fleets, especially those on outright purchase with a high percentage of EVs. We are seeing such fleets deferring their replacement cycles and staying out of the used markets in the hope that residual values on EVs will improve.

"As a consequence, some are turning to short-term rental to plug any gaps in the fleet, which can be very expensive."

> "IT WAS WELCOME NEWS TO HEAR THE RUMOUR THAT THE GOVERNMENT MAY CONSIDER RAISING THE EXPENSIVE CAR SUPPLEMENT THRESHOLD AT A FUTURE FISCAL EVENT"
>
> **SIMON STATON, VENSON AUTOMOTIVE SOLUTIONS**

BALANCING THE NUMBERS

Replacement cycles provide many opportunities for creative fleet management, provided operators understand the pros and cons inherent in reducing or extending them.

Reducing them gives greater flexibility, allowing fleets to change vehicles more regularly, test EVs on a shorter cycle or take on new vehicles or technology, potentially bringing better fuel consumption, lower service, maintenance and repair (SMR) on EVs and reduced CO_2 emissions.

Conversely, lengthening cycles may reduce monthly outlay by allowing fleets to fix expenditure over a longer period.

But there may be a negative impact on reliability, driver acceptance and recruitment.

Two of the major factors which affect the cost of operating a vehicle and are directly influenced by the length of replacement cycles are vehicle depreciation and SMR costs.

As a general rule, vehicles depreciate faster in the first few years after registration before flattening out when the vehicle gets older.

But it's also where outright purchase fleets can exploit their flexibility by keeping vehicles for longer when residuals are low, or by writing down cars over a longer period.

This is particularly prominent in the public sector where cars are kept on average for 51 months, compared with 47 months for private sector fleets.

However, the older a vehicle is, the greater the maintenance costs, meaning fleets will need to find the right balance between SMR and leasing costs.

Extended replacement cycles bring the need for MOTs after three years, vehicle warranty expiry and managing SMR charges as a vehicle ages.

Novuna®
Vehicle Solutions

Together, We Make the **Important** Things Happen

Are rising costs and operational pressures holding your fleet back?

From unplanned downtime to inefficient utilisation, costs and operational risks can quickly add up.

By understanding your fleet operation, from single site to national scale, we develop intelligent, asset-led solutions that help reduce spend, maximise uptime, and improve performance.

We give you the insight, tools and support to ensure your fleet operates efficiently, safely and with confidence.

Do you have the right partner to meet today's challenges and future-proof your fleet?

Managing todays fleet challenges requires a partner who not only understands your business but also has the expertise to guide you into the future.

By addressing your immediate priorities we design tailored solutions that deliver results now, while also preparing your fleets for the opportunities and requirements of tomorrow.

Are you under pressure to decarbonise, but unsure how to deliver it across your fleet?

You may already have Evs on fleet, but scaling across your operation, whilst keeping vehicles moving and costs under control is no easy task.

Our in house decarbonisation team work alongside you to build a practical, step-by-step strategy that fits your business.

From infrastructure and vehicle choice to energy planning and implementation, we manage every detail. With Novuna, you can decarbonise with confidence.

Rated **Excellent**

★ Trustpilot

AWARDS 2025 — WINNER — Leasing Company of the Year: more than 20,000 vehicles — 2024 2022 2021 2020 2019

ServiceMark
Accredited from Jan 23 to Jan 28
The Institute of Customer Service

Visit: www.novunavehiclesolutions.co.uk

AN INSIGHT DRIVEN

PROACTIVE APPROACH

TO TYRE MANAGEMENT

Nationwide Help, Right When You Need It

With a network of 2,500+ providers across the UK, we're never far away. Whether your drivers are in city centres or out on rural roads, we've got the coverage to get them back on track, quickly and safely.

Always On, Always Ready

Tyre issues don't wait for office hours. Our team is on call around the clock, ready to respond to breakdowns, blowouts, and everything in between. You get real-time updates, fast action, and the confidence that someone's always there.

Built for Fleets Like Yours

We don't just fix tyres, we manage them. Our service is designed for fleets, with smart tools that help you cut costs, improve safety, and extend tyre life. You'll get insights, support, and a team that understands the pressures of keeping vehicles on the road.

We look forward to meeting you to discuss your fleet management needs

enquiries@directtyre.com
www.directtyre.com

Public sector and perk car fleets cover the shortest distances

Car fleets with the greatest proportion of journeys less than 60 miles from their base are typically from the public sector or driven as a perk. *Sarah Tooze* reports

For the first time, *Fleet News* has delved into the length of journeys which Fleet200 company car fleets cover.

We asked: What proportion of your fleet cars business journeys are local (less than 60-mile radius from their base) and how many are longer national journeys (more than 60-mile radius from base)?

It turns out that most journeys are the former. On average, 60% of car journeys are local and 40% are national.

Analysing the data further reveals the types of organisations where 100% of their car journeys are local.

Most are public sector fleets which have a particular area to cover, such as police and ambulance service fleets, and local councils.

Despite the distances being short, the fleets are not necessarily low-mileage.

South Yorkshire Police and South Yorkshire Fire and Rescue, for instance, has a fleet of 650 cars, which are replaced, on average, at 48 months and/or 150,000 miles.

Sarah Gilding, head of joint vehicle fleet management at South Yorkshire Police and South Yorkshire Fire and Rescue, says: "The majority of our cars are beat cars, although we also have a proportion of high performance cars within the operational support unit, which is marked cars for traffic, armed response and roads policing. They do high mileages but they are geographically based.

"It's very rare that we will travel out of South Yorkshire. We have a number of stations within Barnsley, Doncaster, Rotherham and Sheffield, for example, and the vehicles are mainly used in those areas."

Private sector fleets where 100% of their car journeys are local include estate agents, construction firms, and hospitality and leisure operators.

Perk car fleets typically do local journeys. Preston-based property and construction company Eric Wright Group has a fleet of 300 cars, which are 97% perk, and are replaced at 50 months/55,000 miles. Nearly all (97%) of journeys are less than 60 miles from base.

Steve Openshaw, group fleet manager at Eric Wright Group, says: "We've got project managers, site managers and quantity surveyors who predominantly go to fixed locations for up to 12 months, as well as attending client meetings and meetings at head office."

This type of use lends itself well to electric vehicles (EVs) and the car fleet is entirely electric and hybrid (85% full electric, 12% plug-in hybrid and 3% self-charging hybrid).

South Yorkshire Police and South Yorkshire Fire and Rescue is in the process of transitioning its inquiry cars to electric with 20% of new car orders fully electric and 60% plug-in hybrid.

With the average range of full EVs now almost 300 miles on a single charge, according to the Society of Motor Manufacturers and Traders (SMMT), even high mileage fleets who do journeys that are 60-plus miles away from base can transition to electric.

The survey shows an eclectic mix of organisations who do 100% of their car journeys more than 60 miles from base including facilities management providers and freight companies.

> "WE'VE GOT PROJECT MANAGERS, SITE MANAGERS AND QUANTITY SURVEYORS WHO PREDOMINANTLY GO TO FIXED LOCATIONS FOR UP TO 12 MONTHS"
>
> **STEVE OPENSHAW ERIC WRIGHT GROUP**

Harnessing AI power reduces downtime by 40% for The AA

The latest data-driven solution from The AA, Vixa Pro, predicts when maintenance interventions are needed to minimise costly vehicle off-road (VOR) time for fleets

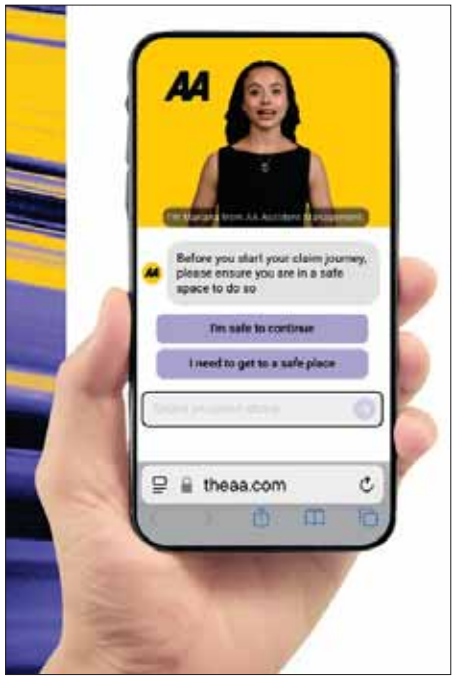
For job-need fleets time is money. Being able to keep the wheels turning rather than having a vehicle off the road due to a maintenance or repair issue can make a significant difference to costs.

Reducing vehicle downtime by just a few per cent can be worthwhile – so imagine reducing it by as much as 40%.

The AA has achieved exactly that with its own roadside assistance and recovery fleet of more than 3,000 vehicles.

That's thanks to its latest innovation – Vixa Pro – a vehicle health check tool which uses artificial intelligence (AI) and cutting edge data, combined with insights built from decades of experience, to predict and prevent vehicle downtime.

Fleet News spoke to Ryan Naughton, head of B2B connected car and European relations at The AA, about the organisation's data-driven solutions.



'Always Ahead' with proactive fleet management

The AA's approach is to be 'Always Ahead', according to Naughton. That means using digital tools to provide a proactive, not reactive, maintenance service to fleets.

Vixa Pro, which launched at the end of 2024, pulls in connected car data from multiple sources, including The AA's own products that it fits to vehicles, third-party telematics providers and OEMs, and can recommend actions based on that data and the history of work The AA has carried out previously.

The AA has been supporting drivers for 120 years and has access to datasets from 10 million vehicles.

"We've got 16.3 million customers, we attend 3.5 million breakdowns a year and we've got five-plus years worth of data that we can use learnings from," Naughton says.

"Whether you have a single brand fleet or a multi-marque one we can give you a singular view of your fleet's roadworthiness."

Vixa Pro predicts whether a vehicle is likely to have an issue.

For example, it can predict with 85% accuracy whether a battery is going to fail. This enables fleet managers to pre-empt an issue with a service or repair rather than risking a vehicle breakdown and prolonged downtime.

"It allows our fleet customers to make more informed decisions," Naughton says.

Having this level of insight on vehicle health is particularly important for fleet managers who have extended replacement cycles for both cars and vans post-Covid-19.

It's not uncommon for cars to be replaced at four-to-five years now, although the average replacement cycle for vans is three-to-four years in The AA's experience.

"People are travelling fewer miles a year with the advent of video conferencing," Naughton says. "It's pretty standard now for someone field-based to do 15,000 miles a year on a lease whereas previously their annual mileage would have been much higher."

As for vans, Naughton suggests that the rise of the last-mile delivery model has had an impact on when vans are replaced.

Leading the charge on EV adoption

The other dominant trend among fleets is transitioning towards electric vehicles (EVs) to align with sustainability goals.

While company car fleets are racing ahead with EV adoption, spurred on by low benefit-in-kind (BIK) taxation, van fleets have been slower to make the switch.

The AA, like its fleet customers, is in the process of transitioning to electric.

"We're committed to delivering net zero by 2035," Naughton says.

"Our company car fleet is 97% powered by electric and we're scaling the adoption of electric vans, where possible, but we have to be focused on service and customer expectations.

"Our mobile mechanic fleet, which is now 100 vehicles, is all EV, on the basis that it is planned work in dense urban areas.

"We've got four EV recovery service trucks as our test approach, and when they joined our fleet in 2024 they were the first fully-electric recovery trucks in the UK.

"So we're adopting EVs as and where we can, and as fast a rate as we can."

Like it does with petrol and diesel cars, Vixa Pro can deliver insight on EVs. For example, The AA has found the top 30% of breakdown faults for EVs are almost identical to petrol and diesel cars. (And not that the driver has run out of charge, which can help fleet managers to alleviate driver range anxiety concerns.)

Continuing to innovate

Vixa Pro is just one of a number of digital innovations from The AA.

Drivetech's HALO Insights, which launched in December 2023, can take data from multiple telematics suppliers and provide detailed insights into driver performance, highlighting areas of risk where training interventions can help get drivers back on track.

Training can be face-to-face, online and even virtual reality (VR)-based.

Through HALO Insights, fleet customers can also benchmark their performance to "see what good looks like", according to Naughton.

The AA rolled out Digital Claims Assistant – a digital first notification of loss (FNOL) process – last year to its B2B accident management business to allow drivers to complete accident reporting anytime, anywhere.

"It's pretty standard now for someone field-based to do 15,000 miles a year on a lease whereas previously their annual mileage would have been much higher"

Ryan Naughton

To ensure the process is handled empathetically, The AA introduced video avatars – essentially a digital person to guide customers through the claim.

Digital Claim Assistant has already been used in 51% of accident situations on The AA's own fleet.

Drivers can also report a breakdown online, with one of the advantages being that the app can take location details from the GPS on the driver's mobile phone to pinpoint where the vehicle is.

Through Vixa Pro, The AA can now identify whether it is best to deploy its breakdown service or a mobile mechanic.

"Based on the fault code we've seen on a vehicle and the data we've got we can predict what the repair will be and deploy the correct service provision," Naughton says.

"We're also starting to predict what knock-on effects can happen from particular issues."

It's a whole new level of data insight, which means The AA remains 'Always Ahead'.

To visit The AA Business Services LinkedIn page Click here
To visit the Drivetech LinkedIn page Click here
To access The AA B2B resources hub Click here

Your fleet, **made clearer.**

From costs to carbon, our uniquely transparent approach to funding & fleet management will help you on your journey to electrification.

Holman
Driving What's Right

Find out more
holman.co.uk

More fleets are choosing finance lease to fund vans

Just one-in-20 were using the funding method in 2021, compared with more than a quarter today. *Gareth Roberts* reports

There has been a significant decline in the proportion of fleets using an operating lease to fund their vans.

The overwhelming majority (87%) of the Fleet200 used the funding method for some of their vehicles in 2021, when members were last surveyed, but this has fallen to 55% in 2025.

The decline, however, has not translated into a comparable fall in the proportion of Fleet200 vehicles acquired via an operating lease. Now 44% of the Fleet200 fleet is funded this way, compared with almost half (49%) four years ago.

It suggests that those fleets continuing to fund via operating lease have moved more of the vans across to this method, taking advantage of the lower residual value risk.

This will almost certainly be the case for fleets starting the transition of their LCVs to electric.

The decline in operating leases was more pronounced with private sector fleets, with close to three-in-five (59%) using the funding method, compared to two-thirds-plus (68%) four years ago.

The proportion of vans funded this way has also fallen, from more than half (55%) of private sector vans in 2021, to just less than half (48%) today.

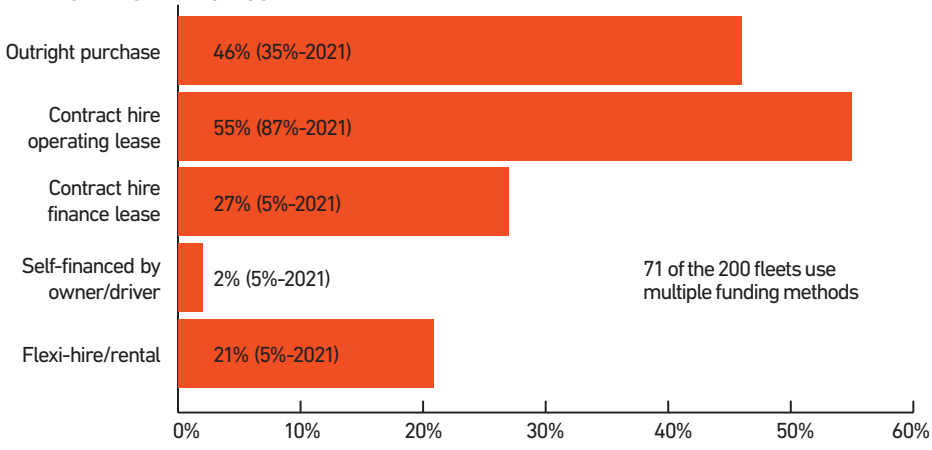
For public sector fleets, however, operating leases have become more popular, used by more than a third (38%) to fund almost a quarter (23%) of their vans.

Four years ago, a third (33%) of public sector fleets employed operating leases, equating to one-in-five vans funded (19%).

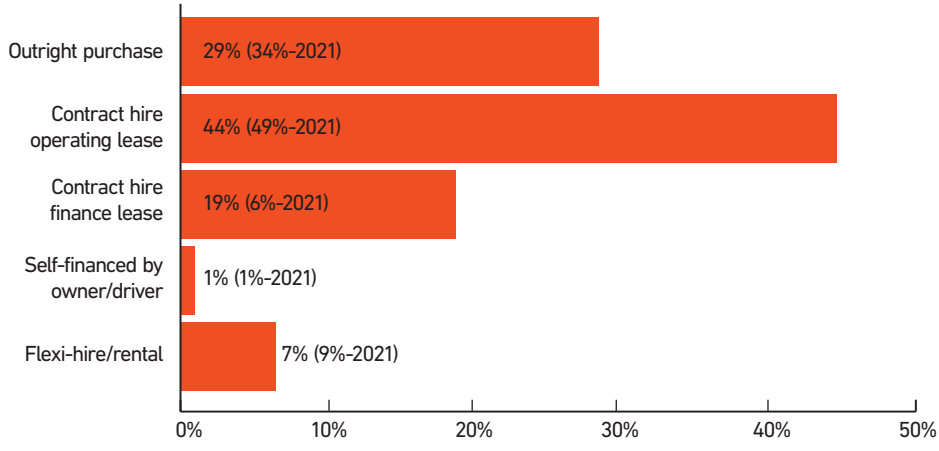
The survey suggests that there has been a shift from operating lease to finance lease, with just one-in-20 (5%) using the latter method in 2021, equating to 6% of vans on the Fleet200 fleet.

> "OPERATING LEASES PROVIDE MORE PREDICTABLE COSTS, WITHOUT THE CONCERN AROUND WHAT WILL HAPPEN ON DISPOSAL"
>
> **ASHLEY BARNETT LEX AUTOLEASE**

VAN FUNDING METHOD USED



PROPORTION OF VANS FUNDED



That compares with more than a quarter (27%) using a finance lease for some their vans today, with one-in-five vehicles (19%) on the Fleet200 fleet.

Flexi-hire is also being employed by more fleets to acquire their vans, increasing from just 5% in 2021, to 21% today. However, that increase has not been reflected in funded vehicles, with the proportion of flexi-hire vans on the Fleet200 falling from one-in-11 (9%) in 2021 to one-in-14 vehicles (7%).

The declining influence of operating leases with Fleet200 members does not mirror growth reported in last year's FN50, which draws its data from a much larger sample – the country's 50 biggest leasing companies.

Operating lease accounted for 88% of the vans on the FN50 fleet, with finance lease accounting for just 10% of vehicles.

The potential unpredictability surrounding the residual values (RVs) of vans, particularly those used for high-mileage or heavy-duty purposes, may make finance leases less attractive.

This also applies to companies which buy their vans outright, especially as they transition to electric. Consequently, it's no surprise to see the proportion of companies using their own cash to purchase vans has dropped from 34% to 29%.

Fleets that have the necessary dedicated focus and support may see bigger returns at end-of-contract disposals so may choose funding options, such as finance lease, that enable them to retain and dispose of the asset at the end of its contract.

Ashley Barnett, senior manager strategic consultancy at Lex Autolease, explains: "In contrast, operating leases provide more predictable costs, without the concern around what will happen on disposal or having the resource to deal with the administration."

The Fleet200 data also reveals that two-in-five Fleet200 members (39%) take a blended approach to funding, while for fleets opting for a singular approach, operating lease came out on top.

Diesel continues to dominate as electric transition accelerates

Electric van fleet adoption grows as operators find ways to beat obstacles such as vehicle suitability and charging. *Andrew Ryan* reports

Van operators face more challenges in adopting electric vehicles than their car counterparts, and this is reflected in the Fleet200 research.

Although fully-electric vans now account for an average fleet proportion of 11.8% – a six-fold increase on 2021's figure of 1.7% – the sector continues to be dominated by diesel.

Four years ago, the fossil fuel accounted for an average of 95.2% of vans on the Fleet200. Although this has fallen 14.8 percentage points to 80.4%, it is still by far the most popular fuel.

Since 2021, petrol and plug-in hybrids have both seen their shares rise slightly (by 2.4 percentage points to 5.4% and by 2.3 percentage points to 2.4% respectively), while the proportion of self-charging hybrids has doubled to 0.2%.

Comparison with year-to-date registration figures to the end of August from the Society of Motor Manufacturers and Traders (SMMT) shows that Fleet200 van fleets are further ahead on the electrification journey than the general market.

In the overall UK market, fully-electric vans have accounted for 9.1% of registrations, diesel 85.5% and others 5.4%.

However, despite the progress being made, the fact remains that it is much harder to electrify a van fleet than it is cars.

Earlier this year the Transport Research Laboratory published Government-commissioned research to outline the enablers and barriers to electric van adoption.

Obstacles identified included that current EVs did not meet operational requirements and there was not a cost-effective and feasible way to charge them.

These challenges led to the creation of the Zero Emission Van Plan, headed by the British Vehicle Rental and Leasing Association (BVRLA), which brought together organisations such the Association of Fleet Professionals (AFP), Logistics UK, Recharge UK, EV Café and *Fleet News*.

The Van Plan's key tasks cover a range of requirements deemed essential to support continued uptake in the electric van market, including increased fiscal support, improved support for public and private charging, and to remove regulatory barriers on 4.25-tonne electric vans.

"A giant leap is needed to move the market to where it needs to be," says the Van Plan. "Without immediate support the transition will continue to stall or even grind to a halt, making the targets in later years impossible to reach."

OVERCOMING OBSTACLES

Despite the challenges, many fleets are successfully adopting fully-electric vans and finding ways to overcome or mitigate the obstacles they are facing.

For example, fleets such as Centrica and DPD are using shared charging facilities operated by First Bus to overcome the lack of depot charging or home charging available to them.

Data on vehicle duty cycles and usage is also key to identifying which vehicles can be easily switched for electric models. "Target the low-hanging fruit first," says Chris Demetriou, assistant director of corporate fleet, transport and ACT, at the London Borough of Islington.

The research suggests that diesel will continue to be the fuel of choice for the immediate future. Close to two-thirds (64%) of current orders are diesel vans, with 52% of respondents reporting that more than three-quarters of their order book is made up of diesel vehicles. More than one-third (35%) said all of their orders were diesel.

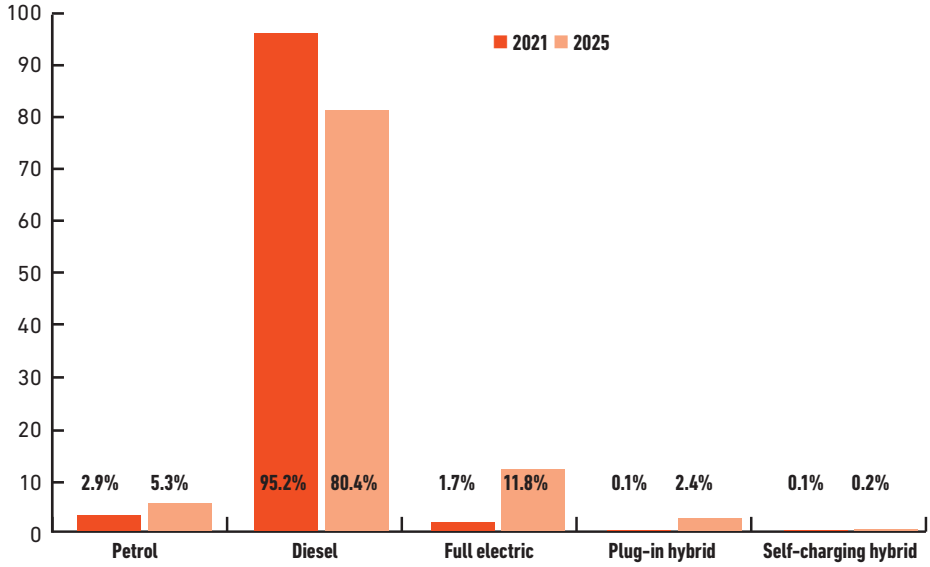
But with battery electric vehicles (BEVs) accounting for an average 23.7% of orders – 11.9 percentage points higher than the average proportion currently being operated – the decarbonisation journey is accelerating.

Plug-in hybrids (PHEVs) account for an average proportion of 4.6% of orders, petrol 3.7% and self-charging hybrids 0%.

One of the fleets ordering PHEVs is Platform Housing Group (PHG).

"PHEV is a compromise, but drivers can utilise the electric aspect and we see it as doing something positive without the anxiety of the restricted electric range. It's a stepping stone to full electric," says Matt Neale, head of fleet at PHG.

AVERAGE PROPORTION OF VAN FUEL TYPES ON FLEET



The research also shows the average CO_2 will fall as the orders are fulfilled.

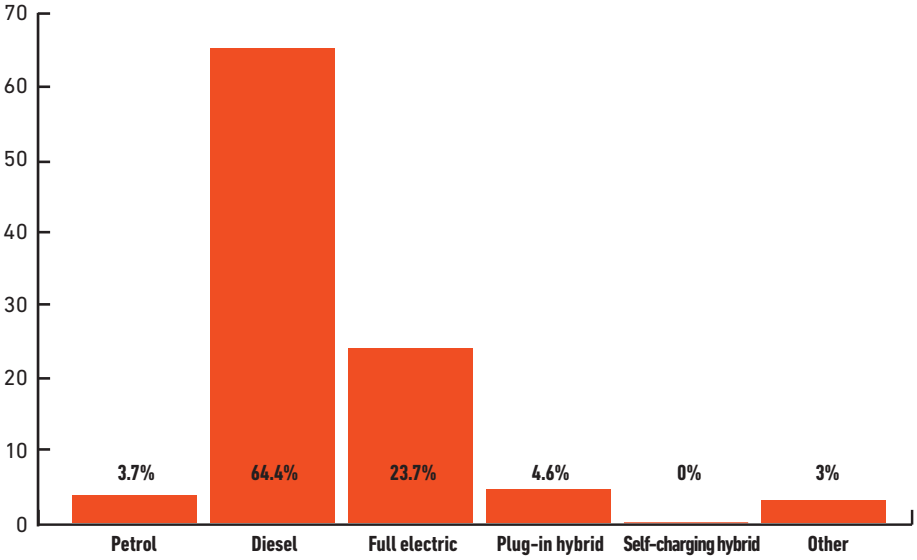
Fleets reported an average CO_2 of 152g/km for their current vehicles, while the average CO_2 of ordered vehicles is 128g/km.

Deeper analysis sheds light on the differing speeds fleets are adopting fully-electric vehicles. While 10% of respondents are ordering just fully-electric vans, almost half (47%) are not ordering any.

The research found 21% or respondents had ordered an average share of 1%-to-25%, 16% have an average order share of 26%-to-50%, 2% between 51% and 75%, and 13% have 76% and above.

This indicates that, although some are pressing ahead rapidly with their electrification plans, the majority are taking a more cautious, gradual approach.

AVERAGE PROPORTION OF FUEL TYPES ON ORDER



CONFIDENCE IN EVs GROWS

As well as the increasing orders for electric vans, there are other signs that fleet confidence in electric vans is rising.

Respondents to the 2025 Arval Mobility Observatory, who already have electric vans or were planning to use them, were asked whether they would cover distances of more or less than 100 miles.

For small vans, 32% of fleets said they would cover more than 100 miles, while 18% said they were being deployed on shorter routes. However, those that do have 100% electric-only policies are, in some cases, extending leases on diesel vans as they wait for suitable electric models to be launched.

It was a similar story for medium vans, with 30% of fleets using them on longer routes, and 17% for shorter ones.

For large vans, the split was closer with 29% deploying them on longer routes, 27% shorter.

"This question provides fascinating results that, to some extent, contradict the more pessimistic commentary that has emerged in the past couple of years around electric van adoption," says John Peters, head of Arval Mobility Observatory in the UK.

"They indicate that operators are not limiting their electric van ambitions to local routes. In fact, a basis calculation suggests the majority of these vehicles are covering 25,000 or more miles a year.

"Clearly, these fleets are successfully overcoming the kind of range and payload objections that we hear about electric vans, and are using them in a similar, intensive manner as they would diesel vans.

"These trends suggest the real-world experience of fleets over time is that electric van operation is less compromised than the general narrative suggests."

How to Scale Your EV Fleet from Pilot to Full Rollout

As businesses get closer to the 2035 OZEV deadline, transitioning to EVs is rapidly becoming a necessity. It may be realistic to rely on the public network and a handful of depot chargers to power your fleet in the initial phase, but scaling to and powering a fully electric fleet requires more careful planning and consideration.

Getting off the Runway

Pilot projects are a vital first step. They allow your business to understand how EVs perform in real-world conditions, test different charging technologies and assess driver behaviours. The valuable data collected at this stage such as charging times, vehicle downtime and energy usage provides an insight into what is working and what requires improvement. Having a partner with expertise in running EV fleet pilot projects is critical, they will guide you through the set-up and help to build the strategy going forward.

Decision Time

Once the pilot has taken place, your business and your selected EV charging partner will begin to evaluate the successes and failures of the project to determine the best path forward. Key decisions revolve around surrounding the right charging infrastructure and vehicle selection, while also identifying the next best routes and depots in a phased electrification process. Organisations that build upon the lessons taught during the pilot project will be better equipped to avoid costly mistakes.

Power at the Fleet Level

As your EV fleet expands, unmanaged charging can create a significant strain on electricity supply and increase costs. This is why most EV charging partners will help to implement smart charging technology to schedule charging sessions and take advantage of off-peak energy rates. Renewable energy sources can also be integrated into the EV charging solution, helping to reduce reliance on the grid and improve sustainability.

Operational Evolution

Scaling your EV fleet is not just hardware, it also requires adapting your operations. Your EV charging partner will help you to understand how to smoothly integrate the new EVs with your existing routes, by mapping out tailored charging schedules and providing long-term robust technical support and training for your staff. Clear communication during the phased rollout of EVs can ease this transition, turning your drivers and managers into advocates of the new fleet.

Looking Long-Term

Ultimately, the transition from pilots to a full-scale EV fleet rollout is about more than electrifying vehicles. It is about reshaping your fleet operations for the future. Organisations that scale effectively can cut costs through energy optimisation, strengthen their ESG credentials and build resilience.
By acting now, you can turn your fleet electrification into a source of long-term advantage.

An EV charging partner such as Mer can help you build a robust solution to power your EV fleet for decades to come. At Mer, we have over 9 years of experience working with more than 700 business customers including IKEA and DX Delivery. If you want to discover more about how to scale EV charging for fleets, **download our latest e-guide.**

mer
Pure energy from Statkraft

Fleets get set to retain vans for longer periods

Current trend for quick turnarounds looks likely to go into reverse. *Matt de Prez* reports

"(BUSINESSES) HAVE FOUND THAT REPLACEMENT CYCLES CAN BE EXTENDED TO LENGTHS THAT WOULD PREVIOUSLY HAVE BEEN CONSIDERED UNIMAGINABLE"

PAUL HOLLICK, AFP

UK fleets are replacing their vans more quickly, and after fewer miles, than they were four years ago, but that trend is set to change.

In 2025, the average van replacement cycle reported by Fleet200 businesses was 59 months and 99,000 miles – a decline on the 60 months and 102,000 miles recorded in 2021.

Prior to 2021, replacement cycles had been shrinking at a faster rate, from a peak of 120,000 miles in 2017.

Operators back then moved to shorter cycles to speed up the replacement of older, more polluting vehicles ahead of the introduction of clean air zones (CAZs) and London's Ultra-Low Emissions Zone (ULEZ).

More recently, fleets have faced different challenges that have forced them to keep vehicles for longer than planned.

During the Covid-19 pandemic, for example, many vehicles were off the road for months and covered fewer miles than expected. Once restrictions were lifted and vehicles were put back on the road, a supply crisis meant many vans could not be replaced on time.

It has taken years for the industry to recover, and manufacturers have only recently been able to offer shorter lead times for new models.

VAN REPLACEMENT CYCLES

	Age (months)		Miles	
	2021	2025	2021	2025
Minimum	36	7	20,000	15,000
Maximum	120	120	240,000	300,000
Public sector average	71	68	105,000	97,000
Private sector average	58	57	99,500	100,000
Fleet200 average	60	59	102,000	99,000

Fleetcheck, a fleet management and compliance software provider, has found that the average age of vehicles logged in its system has increased by 20% in the past six years.

Peter Golding, its managing director, says: "We're seeing statistical evidence which is showing that fleets are getting older and they're keeping the vehicles longer."

According to industry professional body the Association of Fleet Professionals (AFP), some van fleet operators are discovering that replacement cycles can be stretched to up to eight years without encountering 'major' problems.

Fleet200 data shows that Centrica has extended its average van replacement cycle from 39 months and 60,000 miles, in 2021, to 120 months and 111,000 miles in 2025.

The longest replacement cycle recorded in the survey has also increased between 2021 and 2025, with a peak of 300,000 miles for Ocado.

Four fleets keep their vans for 120 months. That compares with just two in the 2021 survey. Royal Mail, the UK's biggest fleet reduced its replacement cycle from 108 months to a still-above-average 84, meanwhile.

Paul Hollick, AFP chair, says that a range of new skills has been developed by fleet managers to make longer cycles operationally viable and economically attractive.

He explains: "Businesses have, of course, been forced into this situation by the huge difficulty of getting hold of new vans in recent years. But, in the process, they have found that replacement cycles can be extended to lengths that would previously have been considered unimaginable.

"Some fleets that typically operated vans for five-to-six years at a maximum are now, in some cases, hitting seven-to-eight years without encountering any real difficulties.

"The overall message is that more management attention is needed to keep these vehicles safe and reliable, but that the economic benefits outweigh the issues."

ELECTRIFICATION DRIVES CHANGE

A key change for fleet operators, in recent years, is the pressure to electrify. This manifests a number of new challenges for replacement cycles.

First, vehicle manufacturers are starving the market of diesel vans in order to drive more buyers into electric models. The ZEV (Zero Emission Vehicle) Mandate requires 16% of new van sales to be electric, this year. But, so far, registrations account for just 9% of the market. This, along with the 2035 cut-off date for the sale of new petrol and diesel vans, means fleets that can't adopt electric models are being forced to keep their existing ones for much longer.

And second, while some fleets are able to embrace electric models, the increased costs associated with buying them and implementing necessary charging infrastructure means they need to be kept for much longer to make financial sense. This is compounded by very poor residual values (RVs) for electric vans, meaning selling them early results in big losses.

> "IF WE LOOK AT THE BUSINESS CASES FOR ELECTRIC VANS AND THE WHOLE LIFE CALCULATIONS AND ILLUSTRATIONS, IT REALLY PAYS TO KEEP THEM LONGER"
>
> **PETER GOLDING, FLEETCHECK**

Golding explains: "If we look at the business cases for electric vans and the whole life calculations and illustrations, it really pays to keep them longer. We're not looking at standard replacement cycles for these vehicles.

"It means we'll have an inexperienced market operating with a vehicle that they have limited knowledge of and a replacement cycle which is beyond what they've done in the past. We're going to end up with an ageing fleet park. There's no question about it.

"What we're dealing with is a month-on-month change, and this will manifest itself properly within two or three years. You're going to have companies with vehicles that are 10-to-12 years old. The challenge there is the amount of attention to detail needed to manage those vehicles; to ensure that they're defect free and to ensure that the vehicles themselves are roadworthy.

"As the vehicle gets older things will start going wrong that nobody's used to experiencing, such as badly worn suspension items. So, there is a higher level of requirements for defect management."

In the first six months of the year, new van sales were down 12.1%. Shoreham Vehicle Auctions (SVA) says a lack of confidence in the economy and some OEMs insisting fleets buy new electric vans to help them meet their ZEV Mandate targets are slowing the market.

"New LCV sales are a barometer of how companies are feeling about the economy," says SVA MD Alex Wright. "The fact sales are falling tells us how they are feeling and, until they are more optimistic, buying new LCVs will not appear on their radar any time soon.

"This mandated approach by OEMs is putting operators off buying new vans across the board as the majority cannot currently justify adding EVs to their fleet as they will compromise rather than add value to their operations."

The knock-on effect of fleets delaying their replacement cycles is playing havoc in the used vehicle market. The average price of an electric van is much lower than an equivalent petrol model, as buyers continue to demand diesels.

Part of the problem is a lack of good quality electric stock entering the market to entice buyers. The pace of change in battery technology also plays a part, as older electric models have shorter ranges and slower charging speeds.

Wright continues: "Until OEMs change this strategy then smaller fleets will continue to buy 12-to-18-month-old diesel vans at auction that are predominantly being entered by the big rental fleets."

Rental delivers real-world e-van experience

New research commissioned by Europcar, has uncovered the challenges that are holding the van sector back from keeping up with decarbonisation.

The white paper, 'Van electrification: understanding barriers, identifying solutions' answers the critical question: 'why is van electrification progressing so slowly?'.

61% of the fleet operators who took part in the research are already using electric. 45% said they face challenges with the real-world range of the e-vans on fleet. 33% are concerned that public charging is unsuitable for e-vans.

Of the 39% of operators who do not yet have electric vans on fleet, 38% said this was because they do not consider them to be fit for purpose; 15% put it down to cost. 46% said they would add e-vans to their fleet if they had a longer range.

With input from the BVRLA and The EV Café, as well as real-world examples of companies already seeing the benefits of electric vans, the whitepaper highlights the perceived and real-world challenges faced by fleet operators when it comes to van electrification.

Are van users thinking about Scope 3 emissions?

Another challenge for businesses reliant on commercial vehicles is Scope 3 emissions. With more big businesses considering the reputational issues around emissions, indirect greenhouse gas (GHG) emissions from sources within their supply chain that they do not own or control, but are still related to their activities – otherwise known as Scope 3 emissions – are becoming an urgent talking point. Scrutiny of activities, upstream and downstream, is coming under the spotlight, including transportation and distribution. Organisations providing these services could, therefore, come sharply into focus.

Rental: the flexibility of lease without the penalties

While many van users are still unsure about the impact of e-vans on performance and productivity, the best way to test and learn is to use rental solutions. Not only will this help a business understand any operational adjustments that might need to be made; it will also help get drivers behind the wheel for a first-hand experience. And, crucially, it will enable an organisation to respond to Scope 3 emissions requirements without any long-term commitments typical of leasing. Indeed, it could be an ideal solution where new contracts can only be won if electric vehicles are a guaranteed component.

Europcar is gearing up for this demand with a wider range of models. We are also investing in the tools to support commercial vehicle drivers as they test and learn. By working with Octopus Electroverse in a first-of-its-kind rental partnership, we are providing a seamless charging experience, overcoming the multi-app conundrum faced by so many EV drivers.

When it comes to helping drivers make the switch with confidence, rental plays a critical role, enabling a flexible switch to the new drivetrain that will keep pace with new technology developments as well as supporting fleets through seasonal and temporary demand.

Click here to find out more about Europcar electric van solutions.

Europcar

Strategy to ensure fit-first-time success

Smart booking, comprehensive stocking, sophisticated supply and the UK's largest network of centres and mobile fitters give Kwik Fit Fleet the tools to support fleet uptime

The shelving capacity of a decently-sized supermarket provides a vivid illustration of the complexity that has developed in recent years in the world of tyres.

A grocery store would typically contain around 10,000 stock-keeping units (SKUs) or individual product lines, which is the same number of tyre makes, models and sizes held in the warehouses of wholesalers such as Stapletons Tyre Services.

By the end of this decade the tyre tally is on a trajectory to exceed 15,000 SKUs, as vehicle manufacturers focus on the rolling resistance of tyres to help them achieve stringent CO_2 emissions targets, maximise the range of their electric vehicles (EVs), create whisper-quiet cabins, and ensure safe grip in wet, dry and icy conditions.

Specifying unique, homologated tyres used to be the preserve of exotic, high performance brands, but is now becoming the norm for mainstream OEMs.

In the relatively recent past, 50 tyre sizes could satisfy about 90% of fleet fitments, giving company car and van drivers a good chance of fit-first-time success were they to turn up unannounced at a Kwik Fit centre.

Today, however, the most popular vehicles operated by Kwik Fit Fleet's customers require up to 250 different sizes, and the inventory of infrequent, but not rare, fitments exceeds 1,000.

Proliferation on this scale is creating a migraine-level headache for leasing and fleet management companies, their fleet customers, and company car and van drivers, all of whom want a fit-first-time service when their vehicles need new tyres.

For drivers, it's a question of convenience; for fleets it's a matter of minimising operational downtime; and for leasing and fleet management companies it's a question of customer service – customer satisfaction levels peak when a vehicle can be dealt with first time. Not that anyone has to wait long.

"If we haven't got the right tyre on the shelf when a vehicle arrives in the morning, we'll get it there in the afternoon," said Tom Edwards, fleet sales director of Kwik Fit.

The company is a stablemate of Stapletons in the ETEL group, and its fast-fit centres have instant visibility of stock throughout the wholesaler's network.

"We see a significant spike in driver satisfaction when we fit first time, so we really encourage pre-booking"

Tom Edwards, fleet sales director, Kwik Fit

"A centre manager can see exactly where the right tyre is, order it, know when the tyre is going to arrive, and can plan a time for the fitment with the customer," said Edwards.

About half of the tyres fitted by Kwik Fit are "on demand", as drivers arrive in a centre expecting immediate service. But, faced with the exponential increase in tyre models, the fast-fit specialist is devoting extensive time and resource to encourage its fleet partners to educate company drivers about the benefits of pre-booking an appointment.

With the cost of unscheduled downtime running to hundreds of pounds per vehicle per day, achieving fit-first-time success is of paramount importance to end-user fleets and businesses.

Kwik Fit Fleet's online booking tool simply asks drivers to input their vehicle registration and post code, and the platform recognises the vehicle, its tyre size, and the fleet's tyre fitting policy.

The system then identifies the most conveniently located centre in Kwik Fit's 693-strong network, and proposes a choice of appointment times. These could be as soon as the same day given that Stapletons makes two deliveries to Kwik Fit centres every day.

"We see a significant spike in driver satisfaction when we fit first time, so we really encourage pre-booking," said Edwards. "It minimises downtime and

helps ensure that the driver has a positive experience."

Kwik Fit's mobile tyre fitting service elevates the convenience factor even higher, providing both a rapid response and a pre-booked service, seven days a week, 8am to 8pm, to keep hard-working fleets on the road.

Many leasing and fleet management companies have a laser-like focus on maximising vehicle uptime for their customers, but they also want to maintain a vice-like control of costs. Mid-range and budget brands are naturally of interest, and Kwik Fit hosts an annual Fleet Tyre Insight event at the MIRA automotive research facility to enable fleets to assess and appraise different tyres.

However, downgrading tyre policies is not possible for many vehicles. A joint exercise by Kwik Fit and a large fleet company found that only 60% of the tyre volume required could be met by budget tyres.

Moreover, fitting like-for-like premium tyres is, typically, the most cost-effective option, given the longevity of the tyres and their impact on EV range and driving performance, said Edwards.

He added that a premium policy can still go hand-in-hand with tight controls. Kwik Fit's renowned Fleet Authorisation System (FAS) authorises 1.3 million tyres per year, with further reassurance provided by the company's I-Care system that enables fleets to inspect images of all their tyres that have been replaced.

"We can also deep dive into our data when we work with our fleet customers to share tyre wear information about certain vehicles," said Edwards. "We know, for example, that tyres need replacing on a particular car after X miles, so leasing and fleet management firms can be very accurate when pricing the maintenance of a car over a three- or four-year lease."

The good news is that newer data shows that the gap in tyre wear between internal combustion-engine (ICE) vehicles and EVs has virtually closed, dispelling early findings that battery-powered cars suffered significantly faster tyre wear.

But, as fleets extend the periods they hold cars and vans, tyre wear is becoming a more pressing issue, with DVSA data revealing that 59% of all MOT failures on EVs are tyre-related. With more than 530 centres able to provide Class 4 MOT tests, Kwik Fit is ideally placed to get vehicles back on the road as swiftly as possible.

"We carry more EV tyres on the shelf than any other fast-fits and we have full access to Stapleton's stockholding, so we are in the best position to get a vehicle through a same-day pass," said Edwards.

Moreover, with a growing number of companies making Environmental, Social, and Governance (ESG) commitments, having tyre recycling specialist Murfitts

as a sister company within the ETEL stable gives Kwik-Fit Fleet customers the reassurance that their used tyres will be recycled responsibly and not sent to landfill or overseas for burning.

It's the final piece of the cradle-to-grave tyre solution offered by Kwik-Fit to ensure the right tyres are in the right place at the right time to minimise fleet downtime while keeping tight control of costs.

VAN JOURNEY DISTANCES

Hurdles to electrification still exist even if vans travel short distances

Majority of van journeys are less than 60 miles from base, but charging infrastructure and 4.25 tonne derogation deter businesses from making electric switch. *Sarah Tooze* reports

On paper, vans which travel within a 60-mile radius from their base can switch from diesel to full electric 'more easily'.

This year's Fleet200 survey reveals, for the first time, that the majority of van journeys cover this distance.

We asked: What proportion of your fleet vans journeys are local (less than a 60-mile radius from base) and how many are longer national journeys (more than a 60-mile radius)?

We found that, on average, 66% of van journeys are local and 34% are national.

Utility companies and retailers (notably supermarkets doing home deliveries) are among the private sector van fleets that only do local journeys. Public sector van journeys mirror cars (see page 29) with police, ambulance and council fleets doing the shortest journeys.

While some fleets have transitioned their vans to electric, or are in the process of switching, there are significant hurdles for others.

Property and construction company Eric Wright Group, which has transitioned all of its company cars to full electric, plug-in hybrid or self-charging hybrid (also page 29), has not yet been able to move away from diesel for its 176-strong van fleet despite the fact that 95% of its journeys are less than 60 miles from base.

The vans are generally used by mechanical fitters, electricians and fabricators who go to rural and urban sites.

"The biggest obstacle (to going electric) is the charging infrastructure," says Steve Openshaw, group fleet manager at Eric Wright Group.

"The van drivers don't want to park their van on their drive, if they've got a one, because that means they can't put their private vehicle there, and quite a few drivers don't own their properties so they aren't allowed to put charge points in."

Unlike the company car fleet, where employees can be travelling to the same site for a 12-month contract, the van drivers are typically only at the same site for a few hours or a few days at most, so it's not feasible to install workplace charging.

The group has trialled electric vans using the public charging network, but Openshaw has found the cost of rapid charging prohibitive.

Just 1% of South Yorkshire Police and South Yorkshire Fire and Rescue's fleet of 100 vans is full electric, despite 100% of journeys being less than 60 miles from base.

The electric vans are used by the facilities management department and can be charged during the day using workplace charging, and are not used during evenings and weekends.

The cell vans, which clock up considerably more mileage and need to be readily available, are not as easy to electrify.

The 4.25-tonne derogation for electric vans is preventing more businesses from switching to electric due to having to adhere to stricter 'truck' regulations.

Paul Hollick, chair of the Association of Fleet Professionals (AFP) says fleets aren't ordering 4.25-tonne electric vans, unless they're a supermarket delivery fleet.

Van journeys can vary, even for different supermarkets, as some deliver most of their products from stores in urban areas while others have regional depots outside town centres and naturally do more miles, according to Hollick.

"It depends who the consumer is and the frequency of the drops of your products to those consumers," he says. "Fleets that go to consumers less frequently may cover a larger patch and do higher mileage as a result.

"There is never one-size-fits-all and all fleets are slightly different."

Fagan & Whalley builds on a century of driver safety with Samsara installation

Cementing a centenary with safety-first logistics

Approaching 100 years of operations, Fagan & Whalley is something of an unsung hero of logistics for customers relying on its expertise.

Founded in 1927 in East Lancashire to initially transport coal via horse and cart, the firm today boasts a large vehicle fleet, several depots enabling nationwide delivery and logistics services, and an international customer base which spans sectors including food and manufacturing, warehousing and contract logistics.

Going from strength to strength, Fagan & Whalley has enjoyed consistent growth in its core business while also acquiring Alan R Jones & Sons, a Newport-based transport specialist which recently celebrated an anniversary of its own, clocking up 50 years of business in 2021.

As a growing family of firms Fagan & Whalley places great emphasis on shared values – not least putting driver safety front and centre at all times.

"Safety has always been at the forefront of whatever we do," explains Olivia Fagan, Compliance Officer, Fagan & Whalley. "We take telematics seriously and that's reflected in our excellent driver scores. We also have a unique ethos: 'If in doubt, brew up.' Drivers are given time to stop, report problems, relax and do everything they can to maintain or improve their safety."

Operations Managing Director Daniel Fagan adds: " What we've achieved with the integration of Samsara's cutting-edge telematics system is a significant step for us. It's more than just technology; it's a commitment to upholding the highest standards of safety and operational excellence."

68% reduction in avoidable incidents

52% reduction in following distance incidents

Having consistently high driver performance scores at Fagan & Whalley, with Alan R Jones eager to achieve the same quality standards, presented a key challenge. How could the entire, unified workforce attain industry-leading levels of safety and service?

Platform for building on a legacy to be proud of

Telematics isn't a new tool for Fagan & Whalley, having used the technology for a number of years to continue to build on an already impressive record of driver excellence. Dron Kyle, Motor Risk Engineer at HDI – Fagan & Whalley's insurance provider – talks about the company's approach to telematics: "They are doing pretty much everything you can do with telematics. They've embraced telematics, they have a great relationship with their drivers, and they engage with the data, which ticks a big box for insurers such as HDI."

While telematics and driver performance monitoring have long been possible for Fagan & Whalley, the technology it was using effectively became a victim of the firm's success. Such was the efficiency of the firm's operations, that is was hungry for even more data and the opportunity to take real-time actions.

"It was only when we started investigating alternatives that we discovered Samsara's AI-based technology," reveals Olivia. "We soon realised it was the perfect fit for us, providing information we needed in real time."

Olivia states the features of Samsara's products which Fagan & Whalley already uses have been a "turning point" for the business. Managers now have a more rounded picture of driver distraction and possess the ability to alert them and offer constructive support in real time.

'Anticipation' monitoring is just one additional benefit of Samsara's technology. For example, head office can assess how aware a driver is of an obstacle on the road ahead – such as a junction or roundabout – including whether the person behind the wheel approached it smoothly or resorted to harsh braking.

Olivia says: "Are they relaxed or planning ahead? We want to continually improve our driver education and safety standards. That's a big part of our wider commitment to making UK roads safer, and of our mission of continued improvement. Samsara has given us extra leverage for improvement in performance – it lets us delve deeper to tailor our driver training."

Six categories of 'avoidable incidents' are used by insurers such as HDI as a metric for their customers' safety record, tracking these month-on-month using claims data. Kyle notes that "a large percentage of avoidable incidents are down to driver distraction. How do we solve this? The technology is there. Using

44% reduction in harsh turns

38% reduction in moderate speeding

33% reduction in severe speeding

11% improvement in safety score in six months

the dual-facing cameras as a coaching tool and alerting the driver to the distraction gives them an opportunity in real time to rectify the situation and continue safely on their journey".

Driver competition is key to continued improvement

Not only is Samsara supporting incremental gains at Fagan & Whalley's long-standing operations, but it's also fuelling the drive to boost success at Alan R Jones. When the business was acquired in 2022, it didn't have the same history of telematics and driver performance monitoring, so Fagan & Whalley sought to bring it quickly up to its level.

Using Samsara data and analytics the firm can quickly create a 'leaderboard' of driver performance, which can be viewed by the team on the app. It's intended for feedback and training, but has also added a valuable element of friendly rivalry as part of the company's ongoing integration.

"The scores at Alan R Jones have already improved dramatically. The drivers have really embraced what the telematics can provide," says Olivia. "They even print out the leaderboard and pin it up in the office so they can discuss it, which is both beneficial for the wider business, and our customers."

"We couldn't have wished for a better relationship with a telematics partner. Samsara's team understands what we need and what we'd like to achieve"

Olivia Fagan, Compliance Officer, Fagan & Whalley

This has created greater visibility throughout the organisation, with every team member being able to see how others are performing.

One of Fagan & Whalley's drivers, Joe Grzebieniowksi, talks about how he has benefited from the partnership: "Since we switched to Samsara, my workday has become much more streamlined. The real-time data helps us to improve our driving habits and creates safer roads for everyone."

Focus on the future with Samsara partnership

In the short time since Fagan & Whalley installed Samsara with minimal disruption and downtime, the business feels the technology has added value to its USPs – from boosting driver safety to offering market-leading telematics that make driver hours visible via one dashboard – making life much easier for operations planners.

And there's more to come. Chris comments: "Our five-year plan is for continued growth, not just for Fagan & Whalley, but our customers too. We want the technology to help us expand our national network but think at a local level so we can support all our drivers. We'd also like to tackle issues such as reducing empty running, which will help our customers cut their carbon footprint."

A burgeoning partnership with Samsara is key to this, Olivia concludes: "They've been great at listening to us, so we'll keep giving our feedback. The more features Samsara can develop for us – from improving driver style and behaviour to helping them calmly anticipate potential incidents such as bridge strikes, weight limits and other obstacles – the better our business can be."

To learn how Samsara can improve performance and training for your drivers, contact a member of our team today on 020 3965 2700 or email us at: sales-uk@samsara.com.

You can also see more at our website – address below.

Visit our website: www.samsara.com/uk

samsara
Operate Smarter™

How Fleet200 companies are lowering incidents

Vehicle choice, technology, data analysis, driver training and communication, plus creating the right safety culture, are combining to help companies reduce risk. *Sarah Tooze* reports

Car and van incident rates vary widely across the Fleet200 Strategy Network, with some companies reporting that less than 5% of their fleet had an incident in the past 12 months while others experienced rates of more than 50%.

These figures do not necessarily mean that one company is better at managing risk than another, it may simply reflect different operational challenges.

For example, high mileage fleets that operate at high risk times (such as between midnight and 6am) are likely to have more incidents than low mileage fleets operating outside peak hours.

Southern Water's company cars and vans average 70,000-80,000 miles on a five-year lease, and fleet manager Martin Lock believes this a key contributory factor in only 2% of the car fleet and 3% of the van fleet having an incident in the past 12 months.

The type of work that car and van drivers do also has a bearing on incidents. For example, it's no surprise that police car fleets, which include pursuit vehicles, tend to have higher incident rates.

Social care provider Thera Trust, which supports people with learning disabilities, has a 2% incident rate on its car fleet.

"I think the drivers feel a degree of responsibility for looking after the cars because, if they damage them, it might mean a vulnerable adult can't go anywhere the next day," says Julie Furnival, business services manager at Thera.

'THE RIGHT VEHICLE FOR THE RIGHT USE'

The trust doesn't allow anyone under the age of 21 to drive a wheelchair-adapted vehicle and has done a lot of work historically looking at vehicle types to make sure they are suitable for the needs of vulnerable people as well as being suitable for staff to drive.

"It's about having the right vehicle for the right use, and making sure the drivers feel comfortable driving it because if you're not used to driving an adapted vehicle it can seem massive," says Furnival.

"If they're new, we get more experienced drivers to go out with them, with no one else in the vehicle. They go somewhere where they can drive the vehicle without any risk and they become much more confident."

Driving a wheelchair-adapted vehicle leads to careful driving in Furnival's view.

Southern Water also spends a great deal of time choosing the right commercial vehicles. It has fleet user groups to get drivers' input on the vehicles before they are built.

"It's about making sure the right person has got the right tool for the right job," says Lock.

One piece of feedback last year was that drivers needed brighter reversing lights when working at a reservoir at night.

"So we put an additional light on the back of the

vehicle that gives it a much wider cast of light to help prevent drivers reversing into anything," says Lock.

Southern Water has been fitting all-season tyres to its vans since late 2023 due to the safety benefits as the tyres have shorter stopping distances than summer tyres on ice and snow.

"The wear rates are slightly higher than summer tyres, but not terrible. So it's a worthwhile investment," says Lock.

Its cars and vans are fitted with safety technology, such as front and rear parking sensors and cross-traffic alert systems.

"We're migrating to a choice of fully electric or plug-in hybrid cars and with that comes a step change in what technology is offered," says Lock.

Telematics with in-cab feedback is fitted to its van fleet and managers are given regular reports on how each vehicle is being driven in terms of harsh braking, accelerating, cornering and speeding.

"Our telematics provider benchmarks our fleet against others and our standard of driving is high," adds Lock.

Thera Trust has also found that fitting telematics with in-cab feedback to its larger vehicles has improved driver behaviour over the past year.

> "I THINK THE DRIVERS FEEL A DEGREE OF RESPONSIBILITY FOR LOOKING AFTER THE CARS BECAUSE, IF THEY DAMAGE THEM, IT MIGHT MEAN A VULNERABLE ADULT CAN'T GO ANYWHERE THE NEXT DAY"
>
> **JULIE FURNIVAL, THERA TRUST**

FLEET SAFETY COMPLIANCE

Alongside choosing the right vehicles and fitting safety technology, Fleet200 companies with the lowest incident rates focus on compliance.

Southern Water has begun proactive servicing so its vehicles have an annual service and safety check, regardless of whether it's due.

"Even though that means we're going to be over-servicing the fleet it puts us in a stronger position when the vehicle is due its MOT," says Lock. Its van drivers are required to complete a daily walka-round vehicle check and log any faults using an app.

All company vehicle drivers and grey fleet drivers are given a 'permit to drive' once they have completed a driving licence check, online risk assessment and subsequent online training modules, some of which are mandatory for all drivers and some of which are based on the driver's level of risk.

The Ministry of Defence (MOD) had a 2% incident rate on its car fleet last year. Its drivers have to sign 'driver standing orders' – a set of mandatory instructions which ensures they adhere to all safety aspects of driving MOD vehicles.

All MOD drivers using a leased vehicle, rental or their own vehicle for business journeys have their licence details recorded and reviewed on an annual basis.

"This ensures no one can drive a vehicle with too many driving points or suspensions as these must be notified to their fleet managers as soon as the incidents occur," says an MOD Phoenix II (PHII) white fleet ops spokesperson.

CREATING THE RIGHT CULTURE

The MOD has a dedicated PHII safety panel, which meets regularly to cover all matters that have arisen, including identifying possible trends in incident statistics, and discussing how to implement any changes that may be required.

The panel includes safety-qualified and experienced personnel from at least five of the 10 defence organisations (three of which must include army, navy and air), the PHII contract management team, the PHII industry supplier, fleet management provider Babcock, the defence transport regulator and, as the largest consumer of PHII services, the army safety case manager.

"This panel ensures the safe operation of our PHII vehicles, while reviewing any safety-related changes to our ways of working, together with the safety risks and associated controls," adds the spokesperson.

The most common incidents involve drivers hitting stationary objects. To try to help reduce these numbers, all vehicles now have reversing cameras or warning buzzers fitted, where applicable, to warn drivers of possible collisions.

Drivers are also given familiarisation training on vehicle types they are expected to drive.

The MOD PHII white fleet ops spokesperson advises other fleet operators to get "buy-in from top to bottom" to lower incident rates.

"By setting an example of inclusivity, all members of the company strive for excellence from top to bottom," he says. "Leaders should buy into road safety and send the message out. By doing so they are more inclined to get buy-in from their employees. Safe driving is for everyone."

Southern Water's Lock prepares a monthly report for the health and safety executive, which includes the CEO, business directors and company secretary, to show them what is happening on the car and van fleet.

"Engagement with the health and safety team is very high with fleet," he says. "We're data-led. What is the data telling us? From that we can decide whether we need to put in an intervention or we need to do something differently. There are many moving parts so we look at the data to try to understand what's happening. Our ethos is to get people home safe at night."

Amey Group had a 2% incident rate with its company cars and a 10% rate on its van fleet last year.

"Every safe mile driven contributes to a stronger safety record," says Julie Davies, group fleet & plant compliance manager at Amey.

"That builds trust with clients, regulators and the public, it reflects directly on Amey's approach and professionalism to road safety."

Its risk management measures include fitting safety technology to vehicles, e-training modules, on-the-road training with new drivers and high risk drivers and campaigns.

"It's not just about reacting to problems; it's about proactively protecting everyone on the road," Davies says.

In the past 12-18 months Amey has run campaigns on checking tyres, safe driving distances, speeding, the importance of pre-use vehicle checks and talked about incidents on contract stand-down days.

Davies suggests that explaining to drivers that avoiding incidents means less money spent on repairs, insurance claims and lost time, and that any savings can be reinvested into better equipment, training, or even driver incentives, may help lower incident rates.

CONTINUOUS IMPROVEMENT

Fleet operators with low incident rates still strive for improvement.

Southern Water wants to introduce a driver risk management system which will provide a holistic view of each driver and further identify high risk drivers.

Ocado, which has an 11% incident rate on its van fleet (mainly low speed manoeuvring incidents) has a programme underway to reduce it.

It is reviewing its recruitment process as it currently has no minimum licence requirements and only requires minimal large vehicle driving experience.

It already has driving assessments, in-depth driver training and vehicle technology aids, but it is reviewing vehicle specification and technology, route planning and adherence to process.

It is also working with its internal insurance team and insurance underwriters to look at the total cost of motor risk and how to reduce it.

EV

Plug in Hybrid

HANKOOK
driving emotion

iON FlexClimate

EVolutionised to perform
more in all weather

TÜV SÜD- Reifentest 2024

3PMSF

Octopus Electroverse and Visa put fleets back in charge

New partnership gives fleets tighter spend controls and real-time visibility of fuel and charging expenditure as they transition to electric vehicles

Vehicle electrification may be propelling fleets into a hi-tech new world, but for many companies it's also resurrecting the paperwork of previous decades. The culprit is electric vehicle (EV) charging and the manual processes required to monitor and reimburse charging, which can take place at home, at the workplace or at public charge points.

The tariffs at these destinations can differ by a factor of 10, a variance that makes it vital for cost-conscious fleets to have forensic visibility of where their drivers plug in.

But this data also needs to be consolidated before being integrated with petrol and diesel spend, so fleets can monitor and control their in-life total costs of ownership (TCO). Even the most environmentally committed businesses are not transitioning all of their vehicles to battery power in a single switch, which means most fleets will have at least three or four years when charging expenses sit alongside refuelling costs.

Stir into this complicated cocktail the multiple apps, cards and RFIDs required to access the UK and Europe's fragmented public charging infrastructure, and fleet, HR and finance departments face an uphill struggle to access data central to TCO.

Aiming to bring calm to this blizzard of bureaucracy, Octopus has launched a new Fleet Card that consolidates all of this data into a single web platform with a customisable dashboard, while offering a simple solution for drivers.

Powered by Visa, the universally accepted card allows drivers to fill up at any forecourt, where Visa's merchant codes let employers restrict expenditure to fuel and car washes.

"All the data from the transaction – time, date, location, volume of fuel, cost, VAT and so on – is then pulled through on the app for the fleet manager," said Matt Pretorius, head of fleet sales at Octopus Fleet.

Identical data is captured by Octopus's EV charging card and app for company drivers behind the wheel of a battery-powered vehicle.

"Both apps then filter into the Octopus fleet platform, providing the fleet manager with a single, consolidated bill for all on-the-road spending in one place, whether it's from a legacy filling station or a new charging hub," said Pretorius.

This is not just an administrative fix, but a strategic tool, he added, "and an absolute game changer for fleets."

The solution not only delivers comprehensive financial visibility, but also administrative efficiency, saving time and improving the accuracy and security of business mileage claims.

Moreover, working with Visa ensures the service is fully compliant with the Payments Services Directive (PSD2), whether in the UK or Europe.

Importantly, the technology can integrate home charging into its platform, with drivers simply required to provide their domestic electricity tariff, the details of their wallbox, and their vehicle registration and VIN number. As soon as the integration is set up, the system captures all home charging events, which are then marked by the driver as personal or work-related sessions – it can even cross-refer the time of charging with any off-peak tariffs.

The alternative doesn't bear thinking about – a mountain of paperwork as each driver supplies a print-out of their home charging events at the end of a month in a manual process that lacks control and validation.

Furthermore, the new Octopus system enables employers to reimburse drivers before their home electricity bill arrives,

Matt Pretorius, head of fleet sales at Octopus Fleet

helping employee cashflow and household budgets.

For companies, the benefits of having complete visibility of fuel and charging spend, the biggest day-to-day vehicle costs, are even greater, laying the foundations for spend controls that fleets have operated for years via old school fuel cards.

"Initially, early adopter fleets would direct their EV drivers to find any charger within their area, because range anxiety was the issue," said Pretorius.

But, as charging infrastructure has improved (the Octopus Electroverse roaming network is the largest in Europe, at almost 1.1 million chargers, including more than 100,000 in the UK, and 95% coverage in Europe), range anxiety has diminished and cost control has become more of a factor.

This is going to become even more of an issue as EVs become more mainstream. The first wave of early adopters were likely to have had a driveway where they could install a wallbox, but, according to the RAC Foundation, 35% of UK households lack off-street parking, presenting a huge cohort of drivers who will have to rely on workplace or public charging facilities.

Discouraging or preventing company drivers from using the most expensive, ultra-rapid chargers is going to be vital to build a financial business case for electrification.

"All the data from the transaction – time, date, location, volume of fuel, cost, VAT and so on – is then pulled through on the app for the fleet manager"

"Some companies are now applying filters that remove access to some of the most expensive charge point operators, or at least to limit access, so that it requires an override feature," said Pretorius.

The Octopus charging app automatically opts drivers into any discounts that Octopus has negotiated, communicating the information in emails and on screen. One major charge point operator, for example, offers a 20% tariff reduction for charging between 7pm and 11pm, while Octopus's own Plunge Pricing axes the cost of charging by up to 50% when there is an excess of renewable energy.

Consolidated charging data is also giving fleet executives insights into the energy consumption of drivers, which can vary by as much as 25% dependent on the heaviness of the driver's right foot. Such results identify drivers who would benefit from coaching in safer, greener driving techniques.

Building on the universal acceptance of Visa, wherever the famous badge is displayed, Octopus has launched an even more comprehensive Business Payments Card, which combines the traditional benefits of a fuel/charging card with broader business expenses, such as meals. The card comes with a full set of controls for fleet managers, who can set (and change) spend limits, while capturing all receipts and VAT information in a customisable dashboard.

The card is one more weapon in the armoury of fleets as they look for smarter, more efficient ways to transition to electric vehicles, delivering real-time visibility of spend and maintaining the controls essential to protect fleet budgets.

FLEET & MOBILITY LIVE

Brought to you by FleetNews

SAVE THE DATE

6 - 7 October 2026

NEC, Birmingham

FINDING THE RIGHT CHARGING PARTNER FOR FLEET ELECTRIFICATION

A charging strategy is equally as important as the electric vehicles themselves. Here, we look at the key things you need to consider to find the right charging partner, who can help with both implementation and preparation for the future

In association with

drax | Electric Vehicles

Businesses that are new to electrification often order their electric vehicles (EVs) and then think about workplace charging infrastructure further down the line.

Such an approach can leave them underprepared when challenges arise. The infrastructure costs, for example, may be more expensive than anticipated because there perhaps isn't sufficient electricity capacity at a particular site meaning an upgrade is required.

Or a business may lease its buildings and therefore need permission from the landlord to install charging infrastructure, which can slow the process.

By planning well in advance and working with an experienced EV charging partner challenges such as these can be addressed and overcome much more easily – and in time for the arrival of the vehicles.

"A lot of people tend to think 'well, I'll just put the charge points in, and it will be fine'. But charging infrastructure can be quite complex, particularly if you have a large site or multiple sites," says Naomi Nye, head of sales at Drax Electric Vehicles, which has installed more than 15,000 charge points to date.

"Suddenly, a fleet manager who is used to dealing with vehicles is having to think about what happens in the car park and liaise with lots of different stakeholders, such as facilities and procurement.

"There's a lot to think about. What does the capex (capital expenditure) look like? Who is going to pay for it? Who is going to manage the works? How are you going to monitor and manage charging? Then, when you add in regulation and legislation, it can become a minefield."

That makes having help from experts, particularly at an early stage, invaluable.

An EV charging partner will "make sure you have the right kit in the right location, doing the right job", according to Nye.

BUILDING A DESIGN AROUND YOU

It's often best if the charging partner is agnostic to hardware, like Drax is.

"An agnostic EV charging partner is able to build a design around you rather than you having to fit around an existing product or design," says Nye.

"You may find, even on a site-by-site basis, that your requirements and needs are slightly different, and there are various ways you can adapt your charging. If, for example, you only have two EVs at a site that need a quick charge you might want a mobile DC charger. There's lots of different technology out there that can work for customers."

The right EV charging partner will also look beyond the charging hardware and consider the overall car park design.

"You may need to reconfigure your office car park and may even lose parking spaces because you need bigger, more accessible parking bays for EVs," says Nye.

"Or you may have a reverse parking policy that needs to be adapted because the charging sockets on your electric vehicles are at the front, not the back."

Safety and security measures at charging points, such as CCTV cameras and lighting, also need to be considered.

"You need to make sure that your charging infrastructure and the people who are using it are safe and secure," says Nye. "So make sure it's not at the corner of a car park surrounded by bushes with no light."

If you operate commercial vehicles there's an additional layer of complexity.

"You'll need larger power supplies, bigger access and potentially bigger finances so that will all require more thought and planning than is needed for company cars," says Nye.

"AN AGNOSTIC EV CHARGING PARTNER IS ABLE TO BUILD A DESIGN AROUND YOU RATHER THAN YOU HAVING TO FIT AROUND AN EXISTING PRODUCT OR DESIGN"

NAOMI NYE, HEAD OF SALES, DRAX ELECTRIC VEHICLES

EV charging implementation: step-by-step

Businesses need to consider electric vehicles (EVs) in tandem with their charging infrastructure, according to Naomi Nye, head of sales at Drax Electric Vehicles. But the process should broadly be:

1. Vehicle data: Use telematics data to understand what your fleet is doing, how your vehicles are moving around, the mileage they are doing on a day-to-day basis, where they stop and how long they stop for. "If you can incorporate a charger at those points when your vehicles are pausing then your business operation disruption will be kept to a minimum," says Nye.

"Data, first and foremost, is key because if you haven't got the data, if you're not aware of what your fleet is doing and how it's doing it, you'll find it very difficult to transition your fleet to electric."

Armed with the right data you can identify which vehicles will be quick and easy to electrify and which have more complex journeys and may need to switch to electric towards the end of your strategy.

2. Site assessments: Once you understand how your fleet is moving you need to gather data on your site(s), including what power capacity is available, and whether an upgrade is needed. "We can support that whole process, whether that's with a distribution network operator or an independent distribution network operator, which might be more cost effective," says Nye.

Drax will also look at whether you can use existing capacity differently to avoid an upgrade.

Site assessment should incorporate how your site is used as you may need to make alterations to the car park itself.

3. Supporting home and public charging: If drivers will need to charge at home and/or use public charging, think about how you will support them to do this. Drax can install home chargers and has a partner that can provide reimbursement on home energy bills so an EV driver isn't out of pocket for charging their vehicle at home. Drax also works with partners that provide a single payment card for use at public chargers, enabling it to capture all charging events, whether domestic, depot, or on the road.

4. Business buy-in: There are a number of different stakeholders, such as facilities management and procurement, which will need to buy into your EV charging strategy. "You need to make sure you're touching base across the business and meeting all the priorities," says Nye. "You could do things in stages which means that you're proving the business plan throughout and that can help bring stakeholders on board."

5. Driver communication: Drivers should be informed at an early stage and, ideally, be given the chance to test an EV so they're comfortable with the technology and can ask any questions before their new electric company car or van arrives. "We work with businesses to support their drivers from day one," says Nye. "We've done driver training days for customers and we often find that people are quite pessimistic or nervous about getting an electric car, but, once they've driven one, they love the driving experience."

6. Installation: Drax handles groundworks and civil works as it has a nationwide team of installers and groundworks teams. "We do everything in-house because we have much more governance around health and safety and timings," says Nye.

GETTING MAXIMUM VALUE

Nye points out that when businesses install EV chargers they are, effectively, turning their office car park or depot into a fuel station, which means energy consumption will increase significantly – right at a time when businesses are already facing rising energy costs.

"You need to think of your EV chargers as assets and work out how to get the maximum amount of value from those assets," Nye says.

That may mean making the chargers available to other businesses or consumers at certain times to generate an income stream or smart solutions, such as load balancing technology to optimise the power available.

"Asset optimisation where the electricity can be ramped up and down can be really effective, particularly on a very large site or for a company that has a number of sites," says Nye.

And techniques such as that, coupled with scheduled charging, may mean that a business can avoid upgrading their electricity capacity.

As Drax Electric Vehicles is part of the Drax Group, a leading UK renewable energy company, it can help businesses with these measures, as well as renewable power.

"We can look at it holistically to bring a whole package together and really support in a number of different ways," says Nye.

"We can alleviate some of the capex by arranging different financial solutions in collaboration with third parties so you don't pay everything upfront, and do it in phases."

Drax also offers a number of maintenance and service packages, which can help prevent costly downtime (see 'Ongoing support' panel below).

PLANNING FOR THE LONG-TERM

The right charging partner can help you plan for the long-term and smooth the EV transition.

"We don't just do an installation and walk away," says Nye. "We tend to be partnered with our customers over a long period to really make sure they are getting the most out of their infrastructure and continuing to adapt it as their business needs change."

Nye points out that at the moment the focus is on putting energy into vehicles but as things develop there will be greater consideration for taking energy out of the vehicles and selling it back to the grid (vehicle-to-grid, or V2G charging).

"There are new solutions coming to market all the time and we have a team which focuses on product and innovation," says Nye. "That's really important to keep up with that technology and any new Government regulations and requirements. We then feed that back to customers so they are fully informed, as part of our ongoing partnership."

energy.drax.com

"YOU NEED TO THINK OF YOUR EV CHARGERS AS ASSETS AND WORK OUT HOW TO GET THE MAXIMUM AMOUNT OF VALUE FROM THOSE ASSETS"

NAOMI NYE, HEAD OF SALES, DRAX ELECTRIC VEHICLES

Ongoing support

EV chargers are not simply 'fit and forget' technology. They require regular monitoring for any maintenance issues and, ideally, a preventative maintenance approach.

Drax engineers will visit twice a year as standard to perform electrical tests and make sure everything is working as it should.

"We service our vehicles regularly so we need to do that with our infrastructure as well to make sure it's in tip-top condition and will continue to work for you longer term," says Naomi Nye, head of sales at Drax Electric Vehicles.

Drax provides a 24/7 helpline for drivers or companies to report an issue with a charge point.

It is able to access chargers remotely and can often repair remotely too, which is quicker for customers.

If it can't be fixed remotely then Drax can have an engineer on site within a matter of hours, dependent on the service level agreements (SLAs) and key performance indicators (KPIs) that the customer has set up.

Often, Drax will identify an issue before a customer makes contact thanks to its remote monitoring support.

REAL-TIME REPORTING

A good charging partner should arm you with management information so you can understand charging costs, power drawn, charger uptime, utilisation and CO_2 savings for environmental reporting.

Drax's My Electric Vehicles online portal does all of this and, as it's web-based, multiple stakeholders can access the information and download pre-built reports without requiring a user licence.

Businesses which have telematics fitted to their vehicles (electric or internal combustion engine) are also able to feed that data in.

The portal provides an interactive map for tracking metrics in real-time and users can drill down further into the information if they need to.

"You can see all your charging locations and then look at them site-by-site or even charge point-by-charge point to see which ones are online, if there are any faults showing or if a charger is in maintenance mode," says Nye.

"You may find that facilities management want to focus on this information whereas the fleet manager may want to look at the telematics and understand when and where the vehicles are charging, and procurement may want to look at what kilowatts are being used, the cost of that and what money they are getting back through their payments on their charge points.

"You're not waiting for a report to come through once a month from your charging provider, you can look at the data yourself whenever you want, it's all at your fingertips."

Follow us

Powerful fleet solutions built around your business.

Learn more at **jaama.com**

jaama

DE&I: Time for a recruitment rethink?

Fleet professionals are calling for a new approach to attract under-represented groups to the industry. *Sarah Tooze* reports

Several women have reached the most senior roles in fleet management and are responsible for major corporate and public sector fleets across the Fleet200 Strategy Network. But they still represent the minority (only 20% of respondents to this year's survey were female, including those in administrator and co-ordinator roles) and there are even fewer people from non-white ethnic backgrounds working in fleet.

It's an issue which is acknowledged within the Fleet200 Strategy Network and across the wider fleet industry.

In 2023, the Association of Fleet Professionals (AFP) launched a diversity and leadership committee, with the aim of breaking down barriers in the workplace by promoting diversity, equity and inclusion (DE&I).

AFP committee member Leroy Thomas, contract manager – fleet services at Affinity Water, says: "Vehicles are driven within the fleet industry by persons from all backgrounds and cultures, thus this should be reflected within fleet teams and the fleet industry.

"However, when it comes to recruitment, it has to be a fair process and the best candidate, irrespective of ethnicity or gender, should be offered the job."

> "I HAVE BEEN FORTUNATE THAT MY RECENT EMPLOYERS HAVE HAD A VERY POSITIVE DE&I CULTURE, WHICH HAS CERTAINLY BEEN EMBRACED BY EMPLOYEES I HAVE CONTACT WITH"
>
> **LEROY THOMAS AFFINITY WATER**

Thomas joined the fleet sector in 1988 purely by chance.

He says: "I was working for Dixons/Currys as a goods returns manager in Hertfordshire, and was about to be made redundant as the role was transferring to Yorkshire. The HR director offered me an opportunity to utilise my administration skills as they were looking to merge four fleet departments into one. I thought 'why not?', gave it a try, and I've been working in fleet ever since."

Thomas says he has not had to overcome any DE&I challenges in his fleet career with Dixons/Currys and his current employer, Affinity Water, but did encounter issues prior to joining fleet.

"I have been fortunate that my recent employers have had a very positive DE&I culture, which has certainly been embraced by employees I have contact with," he says.

Affinity Water's fleet team consists of two fleet and procurement co-ordinators (both women) and Thomas.

The organisation has a head of culture and DE&I, Sally Brett, as well as DE&I champions, and four internal employee networks to support under-represented groups and a new men's network, which has a focus on men's mental health and challenging stereotypes.

Brett says it's important to have senior level buy-in and accountability for DE&I.

"This means getting people at the top to be really clear on why it matters to us as a business – it helps us attract and retain the best people whatever their background, and with more diversity in the business we're more likely to be innovative and adaptable to meeting different customer needs," she says.

"It's also important to listen, be curious and engage with people right across the business and focus on making everyone feel valued members of one team with a common purpose.

"So, it's a combination of top-down and bottom-up, and emphasising inclusion, not division."

Thomas suggests that to improve DE&I across the Fleet200, companies need to "really drive forward with their DE&I policies", have a head of DE&I to determine strategy, have DE&I champions across the business, recognise and record diversity numbers, and have regular internal comms on the subject.

Dedicated networking groups can also play an important part. Earlier this year *Fleet News* launched Empowering Women in Fleet (EWiF) to champion, celebrate and elevate the achievements of women working across every part of the fleet sector.

Leah Lindsay, fleet and employee benefits manager at MWH Treatment and a founding member of EWiF, says: "Creating a more diverse fleet team isn't just the right thing to do, it also brings fresh perspectives, better decision-making, and a stronger connection to the communities."

She believes the starting point for making fleet teams more diverse is "visibility and making sure people actually see fleet as a career option".

"A lot of people, especially from under-represented backgrounds, just don't know much about what roles like this involve or that they could be a great fit for them," she says.

> "ENCOURAGING ENTRY FROM A VARIETY OF BACKGROUNDS WOULD ALSO CREATE A MORE DIVERSE WORKING CULTURE, STRENGTHENING THE INDUSTRY WITH FRESH IDEAS AND EXPERTISE"
>
> **DEAN SMITH**
> **RYDON GROUP**

"We also need to be more intentional with how and where we're recruiting, looking beyond the usual routes and reaching out through community groups, schools and training programmes that support diverse talent.

"And once people are through the door, it's about making sure they feel welcome, supported and that their ideas are valued."

Dean Smith, fleet manager, Rydon Group, and a member of the AFP's diversity and leadership committee, suggests that organisations could open up opportunities in fleet to a wider pool of candidates by not requiring applicants to hold a degree obtained through a traditional college or university route.

"While formal education is valuable, it's important to recognise not everyone has the opportunity to pursue higher education due to personal circumstances such as background, home responsibilities, or financial constraints," he says.

He suggests that internal candidates may possess transferable skills that align well with fleet needs, and businesses could support them through secondments or apprenticeships.

"Encouraging entry from a variety of backgrounds would also create a more diverse working culture, strengthening the industry with fresh ideas and expertise," he says.

Sarah Gilding, head of joint vehicle fleet management at South Yorkshire Police (SYP) and South Yorkshire Fire and Rescue, has noticed an uplift in female applicants since doing a presentation at Barnsley College to show there are roles beyond the mechanical side, and at an SYP recruitment event, where the fleet department showcased both police and fire service fleet roles.

Similarly, Lorna McAtear, head of fleet at National Grid, has done school presentations to raise awareness of fleet as a career option.

National Grid's UK fleet department is made up of seven women and six men. Encouragingly, two female graduates, Hind Ballali and Rachel Babb, actively chose to work in fleet, having completed a placement in the department as part of National Grid's procurement graduate scheme. They have been inspired by McAtear.

Ballali sees fleet as a great career because of the transition to electric vehicles and net zero.

"You feel like you're part of something meaningful; fleet is so much more than administration," she says.

■ **Read more about how fleet roles could be marketed differently to attract more women in the September issue of *Fleet News iQ*.**

Grosvenor and Vanaways drive UK electric van revolution as market surges

As the UK electric van (eVan) market accelerates, driven by increasing model choice and government incentives, Grosvenor's partnership with award-winning online van retailer Vanaways is providing significant benefits for companies transitioning to electric vans.

The UK's eVan market is demonstrating remarkable expansion, with over 85,000 electric vans (under 3.5 tonnes) on UK roads. As of the end of June 2025, 12,584 electric vans (under 3.5 tonnes) had been sold in the UK representing about 8.6% of all new van sales in the UK.

Despite this growth, the industry faces challenges like charging infrastructure and upfront costs, with many manufacturers currently below the government's ambitious ZEV Mandate target for 2025.

Vanaways reports that 16% of its supported fleets are now electric, directly hitting the 2025 Zero Emission Vehicle (ZEV) Mandate target – an achievement significantly bolstered by its strategic partnership with Grosvenor. Liam Nicholas, business development director at Vanaways, said, "Many businesses struggle with fleet electrification. Grosvenor's approach to residual value and transparent monthly pricing makes the transition manageable, not scary. Our partnership essentially helps businesses go electric, providing the right vehicles and expert education on issues like range anxiety and charging infrastructure."

The alliance leverages Vanaways' extensive, competitively priced van stock and Grosvenor's agile, human-centric underwriting and flexible finance solutions. This ensures rapid, reliable funding decisions, even for new businesses. Giles Bolton, sales director at Grosvenor, added, "This "human touch" approach, combining stock, finance, and expert guidance, demystifies EV adoption, empowering more UK businesses to confidently transition to electric vans and contribute to the UK's green transport agenda."

Left to right: Liam Nicholas, business development director, Vanaways; Giles Bolton, sales director, Grosvenor and Paul Wickenden, regional business development manager, Grosvenor

The deepening of their strategic partnership is leading to significant benefits for both companies and their diverse customer base.

The strategic alliance sees Vanaways acting as a key supplier for Grosvenor, providing instant access to a large, competitively priced van stock, thanks to Vanaways' direct manufacturer terms and substantial purchasing power. In turn, Grosvenor offers Vanaways' customers swift and flexible finance solutions, including contract hire and finance lease. Liam added, "This partnership is a genuine win-win. Grosvenor offers comprehensive fleet funding and end-of-life disposal services, which our clients truly value. They're incredibly reactive and, being a people-centric business, we can even contact them outside of hours for help. We communicate daily, ensuring everyone stays informed on both issues and opportunities. Giles said, "Our partnership with Vanaways goes beyond typical introducer relationships. We collaborate closely on every opportunity, offering not just finance but also providing outstanding choice, value, and service to customers."

If you wish to find out more visit www.grosvenor-leasing.co.uk or call 01536 536 536

GROSVENOR

From pressure to progress

Turning fleet challenges into strategic advantage

Excellence isn't born in comfort. In a dynamic world, successful organisations are those that proactively adapt to change and leverage it as a source of strength. This requires the right tools, a collaborative team and informed guidance.

Today's fleet environment presents significant challenges, including rising costs, regulatory changes, technological advancements and evolving workforce expectations. These factors create pressure, but also opportunities for growth and improvement. Organisations can thrive by embracing these challenges with the right tools, a collaborative team, and informed guidance. Innovation, driven by collaboration and continuous improvement, is essential in this climate. Strong partnerships are more important than ever to build solid foundations and ensure optimal results.

"There is always something you can do to improve your fleet," said Martin Phillips, chief operations officer, Athlon.

Athlon, a multi-marque leasing and fleet management company within the Mercedes-Benz Group, offers a suite of sophisticated tools and in-house experts to help businesses analyse their fleets comprehensively. From EV readiness to funding options, vehicle selection, and contract terms, their models can calculate the total cost of ownership (TCO) implications of different strategies.

"There's no single right answer – each solution is unique to the circumstances of the customer and its fleet."

The crucial element is an evidence-based and open-minded process. For example, comparing the TCO implications of outright purchase, leasing, contract purchase and finance lease arrangements.

It can also offer robust insights into the risk and rewards of including or omitting maintenance from contracts, a decision that is becoming ever more relevant due to the lower anticipated service and maintenance bills of electric powertrains, but, conversely, customer expectations on up-time and business continuity.

The key is to establish a culture of mastering the fundamentals to effectively navigate today's rapidly changing fleet conditions, "the brilliant basics".

"We support our customers to get all the small things right. By implementing effective fleet policies, backed up by strong in-life support, reporting and insight fleet operators benefit from the culminating impact of these efficiencies."

Vehicle choice, especially the transition to EVs, remains a major topic. While monthly lease rates were once an acceptable indicator of a vehicle's costs, the emergence of battery electric vehicles (BEVs) has changed this. Many more factors now influence TCO, including lower employer National Insurance Contributions (NICs) for zero-emission company cars and reduced maintenance costs.

These factors often mean EVs can offer a more competitive TCO than internal combustion engine (ICE) vehicles, which is likely to be popular with company car drivers due to the attractive benefit-in-kind (BIK) tax for zero-emission cars. However, fleet operators need more support in analysing this and communicating it to their drivers. Partnering with a leasing company that can handle this analysis is vital, as smaller and medium-sized organisations might otherwise struggle to access such insights without continuous investment.

One of the most significant potential savings with EVs lies in the lower cost of electricity compared with fossil fuels. Maximising these savings depends heavily on where the vehicle is charged, with home charging being significantly cheaper than public rapid charge points. This difference can significantly impact TCO comparisons with petrol and diesel vehicles, requiring detailed analysis.

"Electric charging infrastructure and vehicle capabilities are moving at such a pace that if you're not conducting regular reviews, you will miss out on opportunities," said Phillips.

"Our EVReadyTool allows fleets and their drivers to see how EVs can fit into their lifestyles. Customers can model how much charging their vehicles will do at home and how many times they might have to use a rapid charger, and we can then feed that data into our TCO tool."

This comprehensive visibility and analysis enables customised charging strategies for each driver, moving away from generic advice.

The recent HMRC update to Advisory Electric Rates (AER) – now differentiated between home charging (8p per mile) and public charging (14p per mile) – is a positive step for business users claiming mileage. It should bring fairness to reimbursement policies and better reflect real-world charging costs.

However, for salary sacrifice drivers who don't claim mileage, the impact is limited. In these cases, a proactive charging strategy is crucial. Choosing when, where and how to charge – especially utilising home or workplace infrastructure – can significantly impact monthly costs when no reimbursement applies.

If this level of analysis seems daunting, especially for executives with broader responsibilities, Athlon provides a dedicated account manager to each customer. This contact offers as much or as little support as needed, assisting with reviews and providing industry benchmarks for performance measurement.

"We could define a really deep, intricate and strategic solution based on a customer's unique data, or we could choose to implement just one measurable thing from a review that will make a difference to a customer's fleet," said Phillips.

He recommends fleet decision-makers conduct appraisals at least every six months. The introduction of new EVs at lower price points, the increasing ranges of new battery technology, and the expanding public charging infrastructure are collectively

strengthening the operational and business case for electrification each week.

Fleets should expect their suppliers to prioritise in-life costs, according to Athlon, who are committed to driving savings and minimising vehicle downtime. Phillips says that Athlon's differentiator is "we do fleet", with a fleet-only customer base – the company does not serve the retail market and understands absolutely the pressures faced by businesses and the need to maximise vehicle uptime, an appreciation that underpins its service, maintenance and repair (SMR) product, Athlon365.

"The more our customers can work with us around managing service and maintenance the better," said Phillips.

Negotiating favourable parts prices and labour rates is only part of the equation. A significant advantage lies in Athlon's ability to access a national network of workshops when vehicles require maintenance and then to be able to authorise work quickly and oversee the entire process to minimise delays and downtime. To proactively address issues, Athlon collaborates closely with its SMR partners, customers, and drivers to conduct vehicle checks, moving towards a proactive maintenance policy.

Phillips states: "Proactive service bookings become even more important during the winter months when more cars are breaking down or needing attention."

When vehicles do need attention, pre-booking workshop time helps fleets maximise uptime and ensures parts are ordered and in stock. Athlon's 24/7 booking portal, Athlon365, available both digitally and by phone, simplifies appointment scheduling, ensuring that planned events don't occur when the vehicles are most needed, is it too soon to mention Christmas?

Increasingly, customers don't even need to take their vehicles to technicians – the technicians come to them.

"Mobile servicing is incredibly convenient, but it's a proactive solution, not an emergency one, and requires forward planning," said Phillips. "It can transform vehicle uptime by coming to your depot or driveway when vehicles are scheduled to be parked."

This service is proving popular with LCV fleets, where every minute of downtime costs money, and exemplifies how Athlon helps fleets optimise TCO.

"Whether you're transitioning to EVs or reviewing your fleet strategy, we've got the tools, partnerships, and expertise to keep your vehicles on the road and your costs under control," said Phillips.

In a landscape defined by volatility, fleet operators don't need to go it alone. Partnering with a leasing company that brings deep industry insight, access to market-leading supply partners, and investment in cutting-edge analytical tools transforms uncertainty into opportunity.

These partnerships don't just help fleets weather change – they help them shape it. With the right support, volatility becomes a catalyst for smarter decisions, sharper strategy and measurable progress. The fleets that flourish aren't those that fear disruption and try to simply survive it – they're the ones that use it to drive meaningful, confident transformation.

Martin Phillips, chief operations officer, Athlon

Power that moves Great Britain

Your brand. Our chargers.

The right solution for you.

EKO ENERGETYKA SMART ENERGY SYSTEMS

Popular with private fleets, but cash losses its appeal for public fleets

Electric vehicles and sal/sac schemes encourage staff to opt out, reports *Gareth Roberts*

Cash-takers are returning to company schemes thanks to the tax efficiency of electric vehicles (EVs), with Fleet200 data indicating a decline in the benefit's popularity.

More than two-thirds (67%) of Fleet200 members ran a cash allowance scheme for employees in 2025, with some organisations reporting that thousands of employees were receiving cash instead of a car.

However, this was a significant decline on figures collated from the Fleet200 in 2021, when more than three-quarters (77%) of fleets were offering cash.

The lion's share of cash schemes is offered by private sector employers, with three-quarters (77%) of respondents providing a cash allowance, compared with a luttle over a quarter (27%) in the public sector.

Matt Walters, head of consultancy and customer value at Ayvens, says that employers who provide cash allowances can benefit from implementing EV salary sacrifice, especially if drivers trade up beyond the value of the allowance.

"An Ayvens customer is projected to save up to £6,000 per employee over four years simply by switching from cash car allowances to salary sacrifice car schemes," he explains. "These savings are both immediate and substantial.

"From the employee's perspective, the benefits remain strong, even with the company car tax on EVs increasing from 2% to 3%."

While fleets need to consider the potential cost implications of providing employees with a cash alternative, they also need to assess the risk implications from employees driving their own car for business purposes – the so-called grey fleet.

Matthew Hammond, head of fleet & plant at Altrad Services, says his policy treats every driver the same across the business.

"It doesn't define whether they're a company car driver, a van driver or grey fleet, everybody gets the same level of compliance and governance," he explains.

"We go through the same checks and balances, whoever they are and whatever section they're in."

A similar tactic is employed by The AA. Duncan Webb, its fleet director, says: "We actually integrate our grey fleet policy within our company car policy. The rule set is very common.

"Where we deviate slightly is how much we impose on casual users, in particular what types of vehicle they are allowed to operate."

Salary sacrifice provider Tusker says, without visibility, employers cannot guarantee vehicles are roadworthy, properly insured or aligned with environmental goals.

In recent research, it revealed that almost a third (30%) of employers say only a few employees actually use car allowances to fund a car.

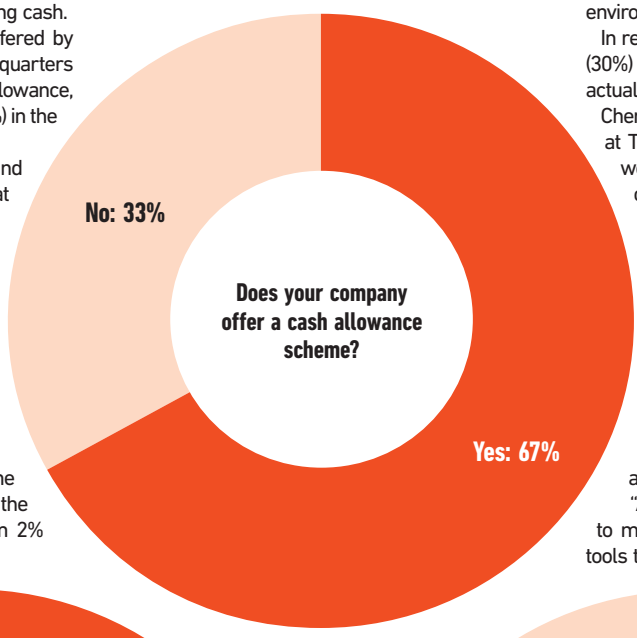
Cheryl Clements, head of business development at Tusker, explains: "When employees drive for work, whether in a company vehicle or their own, employers have a clear legal duty to manage that risk.

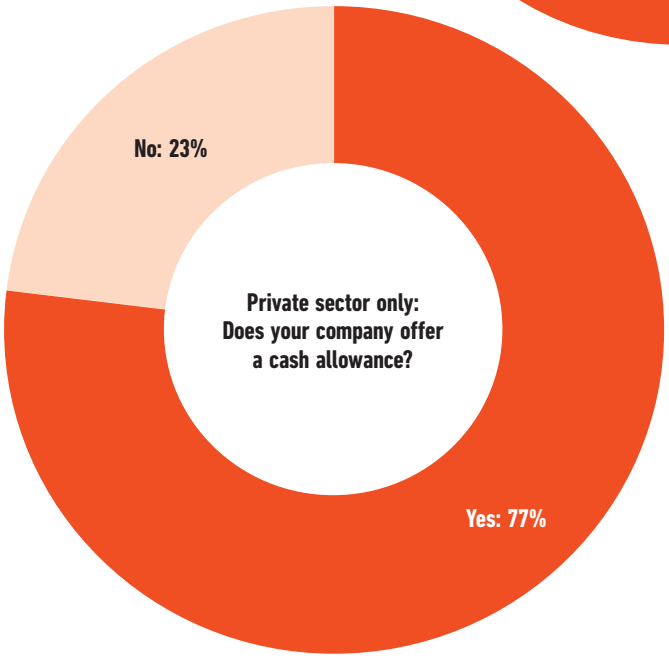
"Too often, basics such as insurance, licence checks and vehicle condition fall through the cracks.

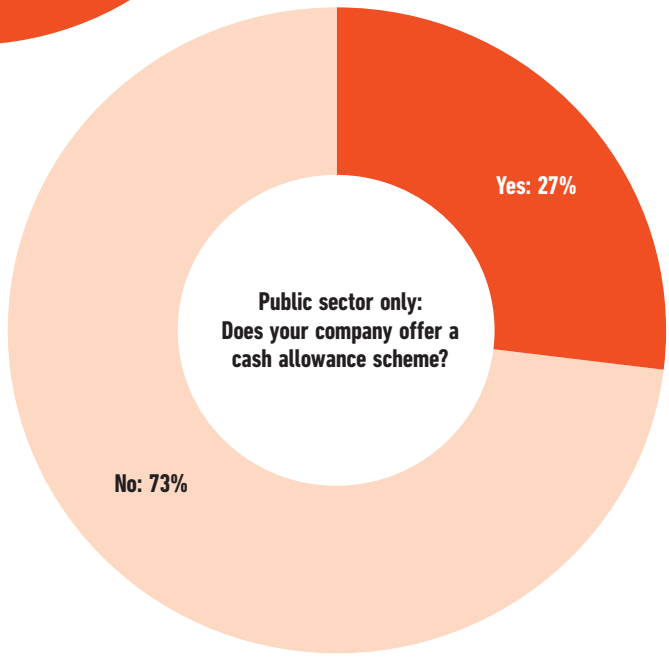
"Taking a more structured approach helps organisations stay compliant, protect their people and make smarter decisions about how business travel is managed."

More employers are now turning to structured car schemes to replace these ad hoc allowances, according to Tusker.

"As grey fleet costs rise and pressure grows to meet climate targets, employers need better tools to manage business travel," adds Clements.







Driving change on UK roads

Having electrified their company cars, private sector Fleet200 fleets are now turning their attention to light commercial vehicles. *Jonathan Manning* reports

The behemoths of the Fleet200 private sector world operate more than 385,000 cars and vans, making them a powerful influence on the UK's vehicle parc. Where these fleets lead, others follow, and the vehicles they remarket heavily influence the shape and emissions of the country's second-hand market. Trends in the Fleet200 matter.

The number of vehicles required to secure a place in the Fleet200 naturally skews the balance of fleet profiles towards light commercial vehicle (LCV) operators. In volume terms, fleet giants such as Royal Mail, BT and Centrica add tens of thousands of vans to the total, and overall 57% of the 166 private sector fleets operate at least as many LCVs as cars, and hundreds more in most cases.

Yet it's the car fleets that have witnessed significant growth over the past four years, with the average Fleet200 business now running 911 company cars, compared with 820 in 2021. Over the same period, LCV fleets have shrunk to an average of 1,595 vehicles from 1,774.

These are not absolute like-for-like comparisons, given the entry and departure of certain companies from the Fleet200, but the scale of the trend is too big to ignore.

The findings support HMRC data, which has tracked a 10.5% uplift in employees paying company car tax in the 2023-2024 financial year, building on a 5.5% increase in the previous year.

The supportive benefit-in-kind (BIK) tax regime for zero emission cars appears to have reanimated demand for company cars, and Fleet200 businesses are in the vanguard of electric car adoption for both their company cars and salary sacrifice car schemes. The average CO_2 emissions of Fleet200 cars has plummeted to 50.7g/km, and the emissions of cars in their order banks are even more climate-friendly at 33.4g/km, almost four times lower than the 129.4g/km average emissions of cars on Britain's roads.

> "WE ALSO NOW OFFER HIGH POWER CHARGING FACILITIES ACROSS EACH OF OUR OFFICE LOCATIONS, ALL OF WHICH UNDERLINES OUR COMMITMENT TO ELECTRIFICATION"
>
> **CRAIG LOGIN, VODAFONE UK**

Electric powertrains are responsible for cleaning Fleet200 tailpipes, with 70% of Fleet200 cars being zero-emission capable – 42% battery electric, and 28% plug-in hybrid. Future orders are even greener, with 57% being battery powered.

This transition has occurred at breathtaking pace – in 2021, only 7% of the Fleet200 car fleet was battery electric.

A number of private sector fleets made early decisions to remove petrol and diesel cars from their choice lists. Vodafone, for example, withdrew petrol and diesel cars from its fleet policy in 2021, deleted PHEVs in 2023, and is on track to be 100% electric before the end of 2026.

"We adopted a very structured approach to electrification, looking at everything from detailed whole life cost modelling through to regularly consulting with manufacturers to ensure the latest electric cars meeting our needs were available," says Craig Login, property contract manager at Vodafone UK.

"We also now offer high power charging facilities across each of our office locations, all of which under-

lines our commitment to electrification."

As a long-standing member of the Climate Group's EV100 network, Siemens has committed to run a zero emission fleet by 2030, and its UK fleet is well advanced in the adoption of battery power.

About 60% of its UK company cars, and 85% of future orders, are battery electric, with lower mileage drivers restricted to EVs since last October, a policy that will extend to all company car drivers from this October.

The company's next target is its LCV fleet, which is at the start of its electrification journey, says Wayne Warburton, mobility services head of fleet and travel at Siemens.

Throughout the survey, fleet decision-makers repeatedly highlighted the difficulties they are encountering in electrifying their LCV fleets. The higher cost of eLCVs, the investment required for charging infrastructure, and the disruption to operating cycles and business productivity were cited by numerous executives.

Others emphasised their need to tow heavy loads or drive off-road, underscoring opinions that eLCVs are not yet fit for purpose for several applications, while several mentioned the uncertainty surrounding the additional responsibilities associated with running 4.25-tonne electric vans.

Overcoming these challenges demands a granular level of detail and a degree of lateral thinking, especially for employees who cannot plug in their vans at home, says Warburton.

One Siemens business, for example, has switched its 10 vans to electric cars, with staff carrying their tools in the boot. Another Siemens division with 600 LCVs is working with an external specialist to analyse 12 months' worth of telematics data from each van, cross-referencing this with driver surveys to see which employees can install a wallbox at home, and which will rely on public chargers.

"The results will form our strategic electrification roadmap for that business," says Warburton.

> "VANS WITH DECENT RANGE HAVE ONLY JUST COME ON THE MARKET, AND A NUMBER OF FLEETS HAVE HAD TO WAIT FOR THEM BECAUSE THEY CAN'T AFFORD OPERATIONALLY TO CHANGE WHAT THEY DO"
>
> **LORNA McATEAR**
> **NATIONAL GRID**

Given the rapid changes in the price and range of new eLCVs, fleets are having to conduct these analyses every six-to-12 months to identify diesel vehicles that could operationally transition to electric, and then calculate the total cost of ownership implications based on projected charging profiles.

Currently, 83% of Fleet200 vans are diesel-powered, and only 10.4% electric. Moreover, 44% of Fleet200 private sector van fleets do not have a single electric model in their ranks, and an even higher percentage, 51%, do not have an eLCV on order. Despite this, 21% of the Fleet200 order bank is electric due to the pioneering electrification efforts of some very large private sector fleets.

In broad-brush terms, three reasons explain these statistics, says Lorna McAtear, fleet manager, National Grid.

"First, the largest fleets are progressive because they've got big sustainability targets, as well as a wide variety of vehicles that include vans which don't cover a lot of mileage, so they can afford financially and operationally to put electric vans in," she says.

"Second, these fleets were early adopters of electric cars and gained experience of both battery technology and charging.

"And third, vans with decent range have only just come on the market, and a number of fleets have had to wait for them because they can't afford operationally to change what they do," says McAtear.

BOOK NOW!

4th November 2025

FN 50 2025

4th November 2025

Park Plaza Westminster Bridge Hotel, London

The networking dinner *of the year*

Over 850 guests booked to attend – limited tables available – BOOK TODAY!

Headline sponsor

OMODA | JAECOO

Associate sponsors

ALLSCREENS NATIONWIDE · chargedev · COX AUTOMOTIVE · Fleet Procure · GEOTAB · nexus Never stop · sopp+sopp · SYSTEM EDSTRÖM · vGroup International

MEET | NETWORK | CELEBRATE | CONVERSE | SHARE

Book your table now – visit www.fn50event.co.uk

For bookings or queries contact **Aisha Ahmed** on **aisha.ahmed@bauermedia.co.uk**

Same destination, different routes

Public sector fleets face different deadlines and constraints along the road to zero emission motoring. *Jonathan Manning* reports

Longer contracts, higher mileages, a greater inclination to purchase, nationwide procurement frameworks... public sector fleets may be heading towards the same zero emission destination as their private sector equivalents, but their timeframes and tools are notably different.

Top of the 'to do' list for several public sector Fleet200 fleet managers is their accelerated target, mandated by Government, to electrify all cars and vans by 2027, three years earlier than the nationwide phase out of new petrol and diesel vehicle sales, and eight years before hybrid technologies reach the end of the road.

This target stipulates that 100% of the central government car and van fleet, including arm's length bodies, such as National Highways and the Environment Agency, must be fully zero emission by 2027, although the goal does not apply to local authorities.

Of the 34 public sector fleets that made the Fleet200, more than two-thirds identified electrification as their biggest challenge, while references to budgets failing to keep pace with inflation obliquely reference both the capex (capital expenditure) and opex (operational expenditure) difficulties presented by finding the funds to invest in charging infrastructure and finance battery-powered vehicles.

The different nature of the challenges facing public sector fleets has prompted the Association of Fleet Professionals (AFP) to create a Public Sector Fleet Operator Working Group, which met for the first time earlier this year. The group aims to give a voice to fleets that are the flag bearers for Government targets, while operating within constraints that differ from the private sector.

"The funding model, for example, is normally different," says Martin Edgecox, national fleet manager at National Highways, and leader of the AFP's public sector group.

Many local authorities operate on an annual funding settlement, while other public sector organisations aim for five-year settlements determined by comprehensive spending reviews and timed around Government electoral cycles. However, the Government has made it clear that public sector bodies cannot bid for extra resources to fund any additional operating expenses arising from the electric vehicle transition (support may be available for capital expenditure on charging infrastructure).

And in a further divergence from the private sector, whatever their settlements, government departments need to spend their money within their financial year or lose it. This, typically, leads to feverish procurement activity in the second half of the year.

Data from the FN200 shows public sector fleets are five times more likely to outright purchase their cars than private sector fleets (55% vs 11% respectively), and three times more likely to buy their vans (67% vs 21%).

"We like the flexibility of being able to purchase a vehicle and use it as we need to," says Edgecox. "We can then sweat the asset, which enables us to provide better value to the taxpayer. Plus, it gives us the flexibility to dispose of vehicles if they're tired and we need to replace them."

This is evident in the average holding periods of public sector cars, at 51 months and 90,000, compared with 47 months and 80,000 miles in the private sector. The longer holding period also explains why the average emissions of public sector car fleets are slightly higher, at 63g/km of CO_2 compared with 51g/km in private sector Fleet200 fleets, due to the legacy of higher-emitting vehicles awaiting replacement.

More surprising are the average emissions of respective order banks for cars, at 48g/km of CO_2 for the public sector, compared with 33g/km in the private sector, signalling the advances that private sector Fleet200 operations are making towards zero emission operations.

However, public sector operators have made greater progress in electrifying their van fleets, with battery power now accounting for 17.5% of their current light commercial vehicles (LCVs) and 33.4% of future orders, compared with 10.4% and 21.2% respectively for the private sector. These averages mask a wide spread of policies, with four Fleet200 public sector fleets committed to 100% electric LCV order banks, whereas a further 11 fleets have committed to no more than 5% or their van orders being battery-powered.

The specialist nature of many public sector LCVs, whether in blue or amber light operations, is proving a difficult nut to crack in terms of electri-

TOP FIVE LOCAL AUTHORITY FLEETS

Fleet200 ranking	Company	Car and van fleet size	Car fleet	Van fleet	Truck fleet	Car operating cycle (months/miles)	Van operating cycle (months/miles)
=125	North Yorkshire Council	750	400	350	200	60	72
=137	Dundee City Council	650	200	450	45	36	36
=170	Birmingham City Council	500	100	400	55	60/60,000	60/60,000
=170	Newcastle City Council	500	50	450	100	84	96
=196	North Ayrshire Council	360	60	300	0	48/100,000	120/150,000

fication, with both range and charging times presenting barriers for organisations that operate around the clock or need to tow heavy plant and equipment.

These fleets are making their "best endeavours" to meet Government emissions targets while remaining operationally functional, says Edgecox. They are also working together to devise charging solutions for sensitive, mission-critical vehicles.

"What we want to do, particularly for blue and amber light fleets, is to see how we can join up to share charging infrastructure on shared sites, because we have certain security clearances on some vehicles," he says.

Lateral thinking is also being applied to find solutions for vehicles that have no immediate electric replacement, such as large 4x4s and pick-ups. National Highways, for example, set up an internal working group, which trialled an electric double-cab and an electric van as potential replacements for the Volvo XC90 and BMW X5. Neither trial identified fit-for-purpose alternatives, but a 12-month trial of a Model Y proved successful, and the organisation now has 24 on its fleet.

Public sector procurement of vehicles and associated services has to comply with strict legal frameworks designed to ensure free and open competition, as well as value for money, says fleet consultant Dale Eynon, who ran Defra's fleet until earlier this year.

These frameworks save time and money in terms of vetting suppliers, although some larger public sector fleets think they might be able to negotiate better terms as individual organisations, given their size.

Suppliers, however, are reluctant to extend such discounts or rebates across the entire public sector.

"All government departments and agencies are looking to extract the most value from the cash they have, and that can often mean renegotiating framework terms to try to achieve that," says Eynon.

"Procurement can be very rigid within government, and it probably takes longer than it does in the private sector. With most contracts you get one chance – there are no best and final offers or post-tender negotiations."

If there's one other significant difference between public and private sector fleets, it's in the size of the fleet departments. The average Fleet200 public sector fleet employs 17 people and has a ratio of one employee per 284 vehicles, whereas private sector Fleet200 operations employ on average eight members of staff and have a ratio of 357 vehicles per employee.

"We fulfil more functions ourselves, whereas in the private sector they outsource them," says Eynon. "It was always cheaper than outsourcing to a third party with a profit margin."

TOP 10 BLUELIGHT FLEETS

Fleet200 ranking	Company	Car and van fleet size	Car fleet	Van fleet	Truck fleet	Car operating cycle (months/miles)	Van operating cycle (months/miles)
16	Metropolitan Police	5,500	4,000	1,500	100	36/100,000	60/100,000
28	Police Scotland	3,142	2,470	672	30	n/a	n/a
63	South Central Ambulance Service	1,550	1,200	350	0	60	60
77	West Midlands Police	1,300	1,200	100	25	48/80,000	84/100,000
86	Avon and Somerset Police	1,100	850	250	15	84/125,000	84/150,000
90	Kent Police	1,090	840	250	1	n/a	n/a
129	South Yorkshire Police	750	650	100	50	48/150,000	72/150,000
132	Cheshire Constabulary Fleet Team	702	558	144	5	n/a	n/a
138	Hertfordshire Constabulary	650	600	50	0	n/a	n/a
141	Leicestershire Police	630	600	30	0	36	96

FleetNews

AWARDS 2026

Wednesday 18th March 2026
JW Marriott Grosvenor House London

It's time to be involved...

as we celebrate the best vehicles, businesses and people in fleet

Reserve your table

Secure your place now – to ensure the best possible position on the night and network with over 1200+ fleet professionals.

Sponsor

Sponsor now – align your company with excellence and success, whilst putting yourself and your products in the spotlight.

Visit **www.fleetnewsawards.com** to get involved today

Platinum sponsors

Ford · GROSVENOR · Herd Group · KINTO · mediafleet delivering your brand · NORTHGATE · SIXT van&truck

Gold sponsors

FARIZON · ogilvie FLEET