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State of Sustainable Fleets Report Released, Finds Sustainable Vehicle Technologies and Fuels Are Growing Across All Sectors

Report is sponsored by Daimler Trucks North America, Penske Transportation Solutions, Shell Oil Company, and Exelon Corporation, and authored by Gladstein, Neandross & Associates (GNA)

SANTA MONICA, Calif. – August 11, 2020 – Clean technology consulting firm and producers of the annual Advanced Clean Transportation (ACT) Expo, Gladstein, Neandross & Associates (GNA) has authored and launched the first comprehensive, technology-neutral industry report that examines the current state of prevalent sustainable vehicle platforms for medium- and heavy-duty fleets and identifies the trends shaping the future of the industry.

Produced with support from the report's title sponsors Daimler Trucks North America, Penske Transportation Solutions, Shell Oil Company, and supporting sponsor Exelon Corporation, the report offers insights into the current and future adoption of four sustainable fuel and vehicle technologies: natural gas vehicles (NGVs), propane (LPG) vehicles, battery electric vehicles (BEVs), hydrogen fuel cell electric vehicles (FCEVs). As fleets adopt these technologies, they are inevitably compared to baseline diesel and gasoline vehicles, which have historically—and will continue to—dominate the commercial fleet market. This report also summarizes sustainability trends in these baseline technologies that serve as a benchmark for emerging alternative fuel vehicles and advanced technologies.

The debut report finds that while diesel and gasoline vehicles have led the medium- and heavy-duty fleet markets in terms of vehicle and fuel sales for decades, fleets are now testing and purchasing sustainable vehicle technologies in record numbers. The authors note the industry is experiencing a critical inflection point where alternative fuel vehicle adoption is expanding from the gradual uptake in niche applications seen over the past several decades, to faster and broader adoption within the last few years, supported by four key findings:

- Across a broad spectrum of fleets surveyed, approximately 98% expect to increase or continue the same level of use of sustainable vehicle technologies and fuels.
- Natural gas, propane, battery electric, and hydrogen fuel cell electric vehicles, the four sustainable vehicle technology platforms covered in the study, are all growing in terms of vehicle sales, fuel sales, and investment.
- Sustainability is the top motivator for purchasing decisions among early adopter public, private, and even for-hire fleets in deploying clean vehicle technologies. Many U.S. fleets are now



transitioning to clean vehicle technologies not just to reduce total cost of ownership but to meet sustainability objectives.

- Fleets confirm there is no material performance loss when switching to most renewable fuels—renewable diesel, natural gas, and electricity—and would use more when it is a cost-neutral, drop-in replacement.

“We applaud the research effort and insights presented by the inaugural State of Sustainable Fleets report,” said Richard Howard, senior vice president, On-highway sales and marketing for DTNA. “Our vision for a future of CO₂-neutral commercial transportation can only be realized by the collaboration between manufacturers and fleets to ensure we are delivering solutions to meet their needs. We are pursuing clean technologies of the future, and we will arrive to that future together as an industry who keeps the world moving.”

“We are very pleased to serve as a sponsor of the inaugural State of Sustainable Fleets Report,” stated Drew Cullen, senior vice president of fuels and facility services for Penske Transportation Solutions. “We are here to advise and support our customers in navigating the complexities of operating and managing the latest vehicle technologies as they seek to reach their sustainability goals.”

“As one of the largest providers of fleet solutions globally, we support our customers in their transition to lower-emission fuels through energy provision coupled with expertise in road services and fleet management. This report is a concise and comprehensive resource, equipping fleet managers with critical insights they need to plan for operations in a lower-emission world,” said Giorgio Delpiano, vice president of fleet solutions for Shell.

“Exelon is committed to providing a cleaner and brighter future for our customers and communities while achieving excellent operational performance,” said Calvin Butler, CEO of Exelon Utilities. “Transportation electrification holds the promise of helping the cities and states in which we operate meet their environmental goals, reduce their carbon footprint, bring cleaner air to all communities we serve and create economic opportunity through job creation and reduced energy costs. At Exelon, we recently announced our commitment to electrify 50 percent of our utility vehicle fleet by 2030, and we understand the importance of selecting the right sustainable technology and designing, building and implementing the necessary infrastructure. Fleets across the U.S. rely on industry resources like the State of Sustainable Fleets report to make informed decisions as they transition to clean fuels and technology.”

Through interviews and surveys, the report gathers data from stakeholders who have real-world experience deploying sustainable vehicle technologies, including progressive fleet owners and operators, original equipment manufacturers (OEMs), and infrastructure providers. The analysis includes public, private, and for-hire fleets, including school, municipal/shuttle, urban delivery, refuse, utility, transit, short-haul, and long-haul sectors. This first-of-its-kind report includes unique insights into vehicle sale trends, anticipated vehicle development timelines, real-world infrastructure and fuel costs, and the growing adoption of renewable fuels.



Structured to cover each of the sustainable vehicle technologies in depth, the report is organized such that each chapter is a standalone guide to the current state and future trends of that technology with detailed data, analysis, and unique insights.

GNA is hosting a complimentary two-part virtual launch event to share the report's key findings in partnership with [ACT Virtual](#), a digital extension of the annual ACT Expo. On Tuesday, August 11th at 10 a.m. PST executives from the report's title sponsors will discuss the report's findings. Panelists included:

- Brian Cota, vice president of sales for national accounts for Daimler Trucks North America
- Drew Cullen, senior vice president of fuels and facility services for Penske Transportation Solutions
- Giorgio Delpiano, vice president of fleet solutions for Shell Oil Company
- Erik Neandross, chief executive officer for Gladstein, Neandross & Associates (GNA) will moderate the discussion

Representatives from leading fleets will join a follow-up panel, the State of Sustainable Fleets in a COVID-19 World on Thursday, August 13th at 10 a.m. PST. Panelists include:

- Carlton Rose, president of global fleet maintenance and engineering for UPS
- James Cade, vice president of fleet services for Ruan Transportation
- Darryl Spencer, senior assistant vice president of engineering for Dallas Area Rapid Transit (DART)
- Drew Cullen, senior vice president of fuels and facility services for Penske Transportation Solutions will moderate the discussion

For more information about the report and the launch event series, visit www.StateofSustainableFleets.com.

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About Gladstein, Neandross & Associates (GNA)

GNA is a North American consulting firm specializing in the development and commercialization of renewable energy technologies, near-zero and zero emission vehicles, and low carbon fuels for transportation and commercial use. GNA's core expertise is providing strategic support to develop and bring technologies to market, managing relationships with key public agencies, grant writing and administration, as well as implementing effective outreach, communication, and education programs. www.gladstein.org



About Daimler Trucks North America

Daimler Trucks North America LLC, headquartered in Portland, Oregon, is the leading heavy-duty truck manufacturer in North America. Daimler Trucks North America produces and markets commercial vehicles under the Freightliner, Western Star and Thomas Built Buses nameplates. Daimler Trucks North America is a Daimler company, the world's leading commercial vehicle manufacturer.

About Penske Transportation Solutions

Penske Transportation Solutions is the umbrella brand for Penske Truck Leasing, Penske Logistics, Epes Transport Systems and Penske Vehicle Services. Our businesses provide innovative transportation, supply chain and technology solutions to keep the world moving forward. Visit www.GoPenske.com to learn more.

About Shell Oil Company

Shell Oil Company is an affiliate of the Royal Dutch Shell plc, a global group of energy and petrochemical companies with operations in more than 70 countries. In the U.S., Shell operates in 50 states and employs more than 17,000 people working to help tackle the challenges of the new energy future.

About Exelon

Exelon Corporation (Nasdaq: EXC) is a Fortune 100 energy company with the largest number of electricity and natural gas customers in the U.S. Exelon does business in 48 states, the District of Columbia and Canada and had 2019 revenue of \$34 billion. Exelon serves approximately 10 million customers in Delaware, the District of Columbia, Illinois, Maryland, New Jersey and Pennsylvania through its Atlantic City Electric, BGE, ComEd, Delmarva Power, PECO and Pepco subsidiaries. Exelon is one of the largest competitive U.S. power generators, with more than 31,000 megawatts of nuclear, gas, wind, solar and hydroelectric generating capacity comprising one of the nation's cleanest and lowest-cost power generation fleets. The company's Constellation business unit provides energy products and services to approximately 2 million residential, public sector and business customers, including three fourths of the Fortune 100. Follow Exelon on Twitter @Exelon.