

2020 STUDY

GREEN
TRANSFORMATION
IN THE AUTOMOBILE
INDUSTRY



**GREEN TRANSFORMATION IN THE AUTOMOBILE
INDUSTRY 2020**

BACKGROUND AND FRAMEWORK OF THE STUDY

For this study, the consulting company Staufen AG surveyed a total of **267 automobile industry companies** in Germany about the topic **green transformation in the automobile industry**.

The survey was conducted in July 2020.

About the Study



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MANAGEMENT SUMMARY

- **The potential for ecologically sustainable activity** in the automobile industry **has not yet been exhausted**. Nine of ten companies need to make up some ground here.
- While almost nine out of ten OEM's state that they **are strongly committed to this area**, only just over 50 percent of suppliers are committed.
- A big obstacle to more sustainability in the automobile industry is clearly that many ecological measures do not pay off.
- Nevertheless, both OEMs and their suppliers place value on an **ecologically oriented supply chain**.
- High brand value increases the sustainability efforts since **ecological questions flow into purchasing decisions**. However, OEMs can only take this path in cooperation with suppliers and their supply chain.
- While the **Green Awareness Index** underscores the significance of ecology for the automobile industry, the **Green Maturity Index** clarifies the current deficits in the implementation of necessary measures.

The **CO2 goals** striven for can only be realized along the **entire supply chain**

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THE RESULTS

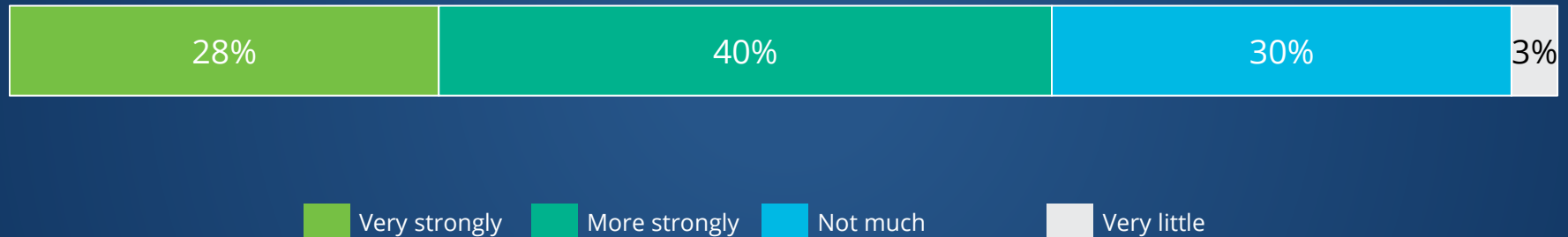
NOTE: THE RESULTS ARE ROUNDED UP TO WHOLE NUMBERS.

In your opinion, how engaged in the green transformation are companies in the automobile industry in Germany as compared to other industries?



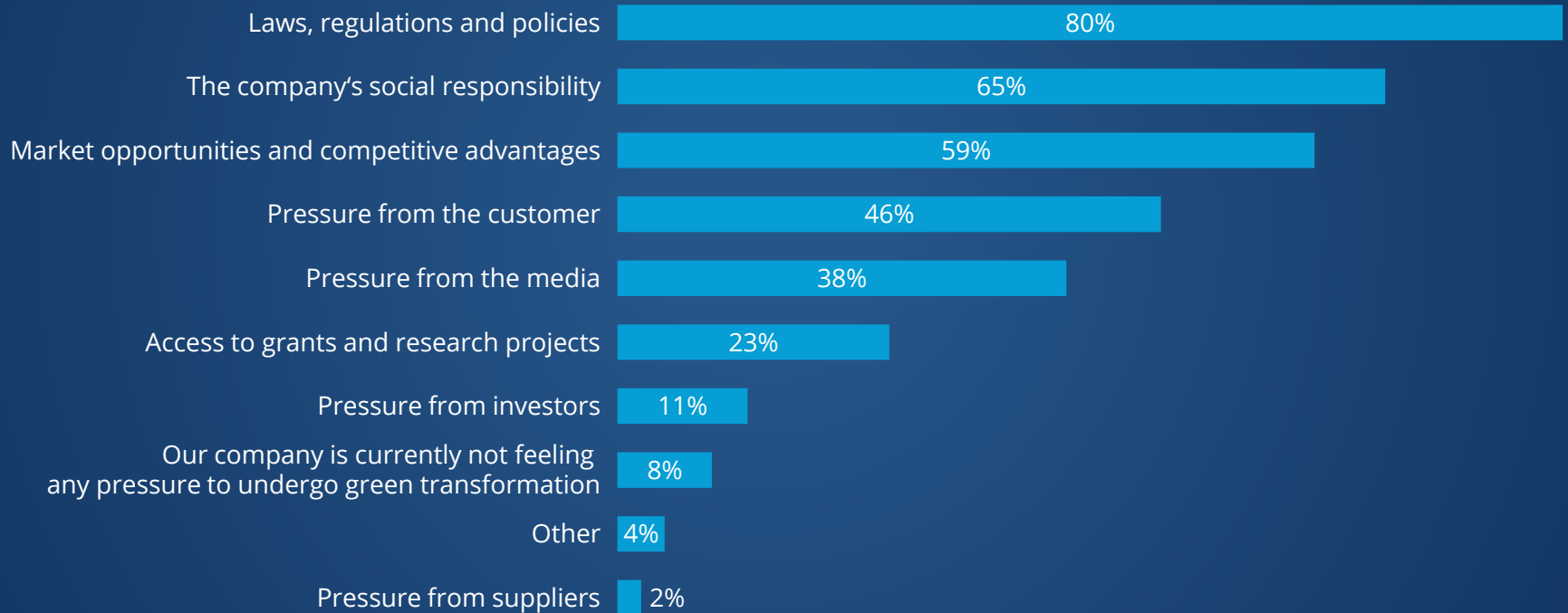
When it comes to **environmental protection**, the **automobile industry** regards itself as a **pioneering industry**

How engaged is your company in the green transformation?



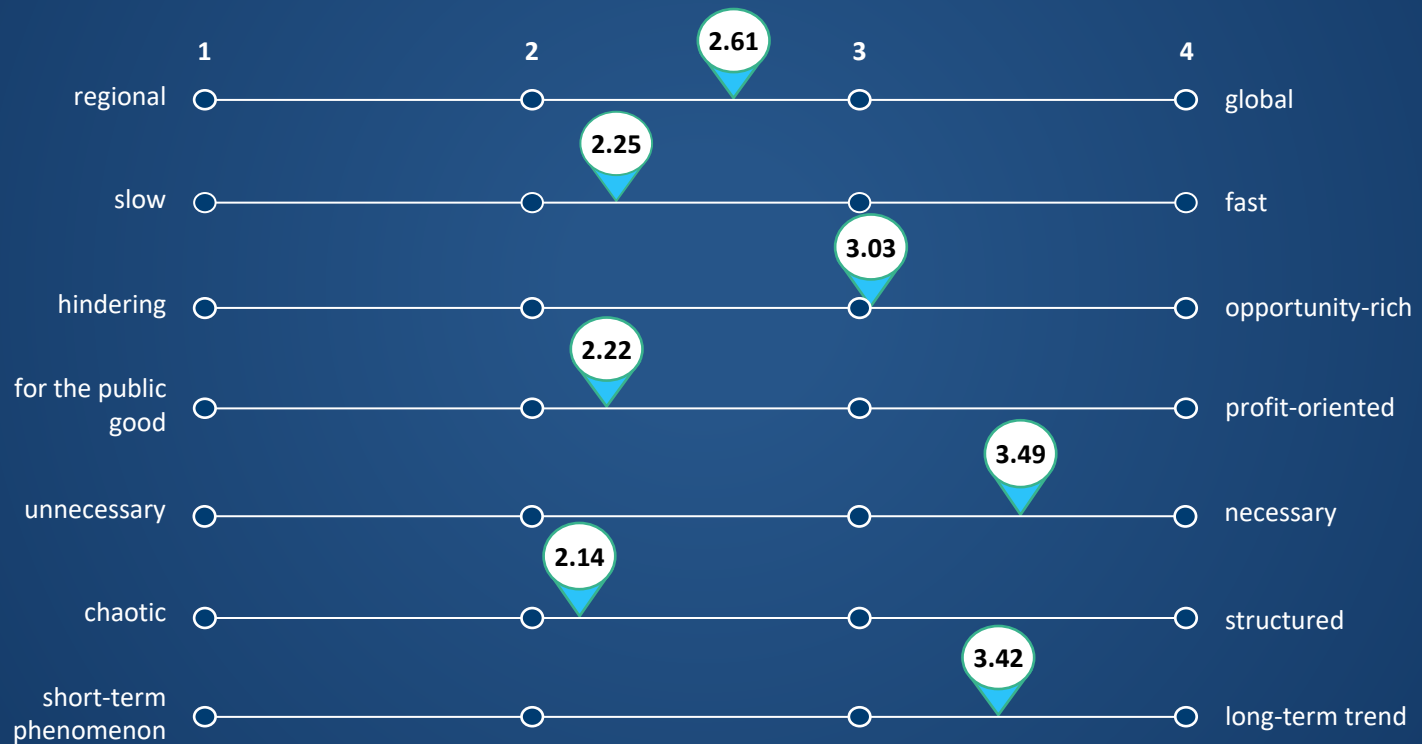
Companies in the automobile industry present themselves as having a **good "green report card"**

Which factors are the main drivers of the green transformation?



Political pressure is the greatest driver for the green transformation

Which of the following terms do you associate with the topic "green transformation"?



The **opportunities of the green transformation** are still being approached **too slowly** and in an **insufficiently structured manner**

How do you evaluate the following statements?

"Our company must drive green transformation in order to be able to survive in the market of the future."



"Our company's ecological potential has already been exhausted."



"The ecological effect that our measures can achieve is very minimal."



I agree

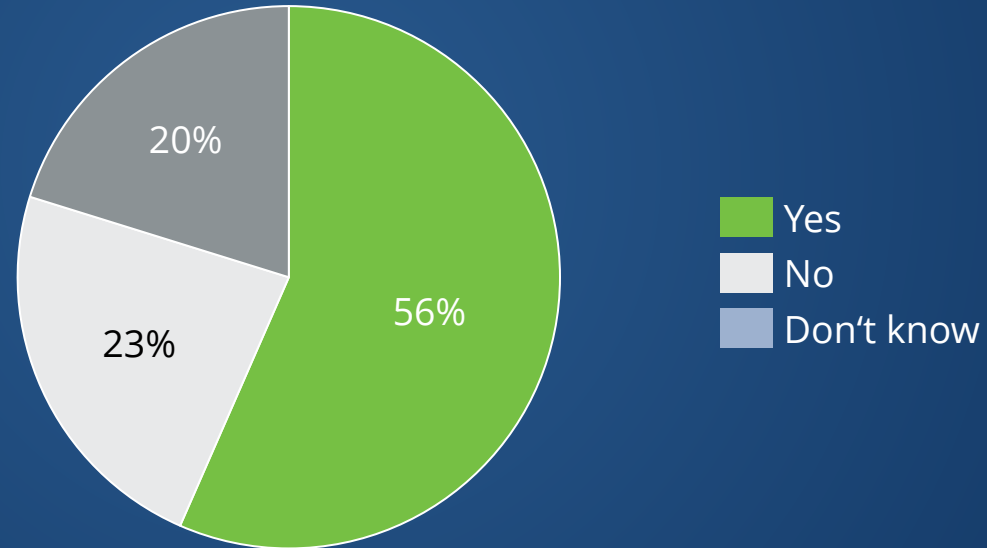
I tend to agree

I tend to disagree

I disagree

There's a lot of **potential**:
There is no escaping the **green transformation** in the **auto industry**

Has your area implemented an ecological improvement measure in the last three months?



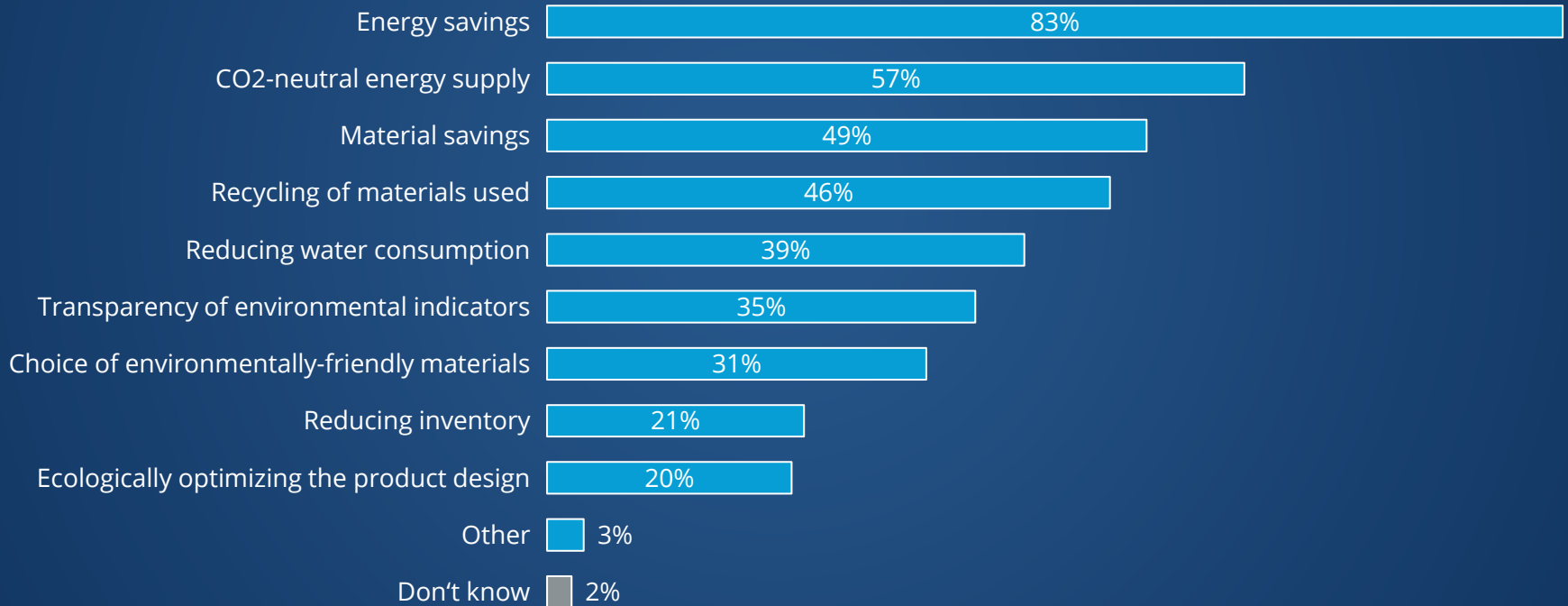
From **CO2 reduction** to **home office** - ecological measures are being implemented

How do you generally evaluate progress with regard to implementing improvement measures at your company?



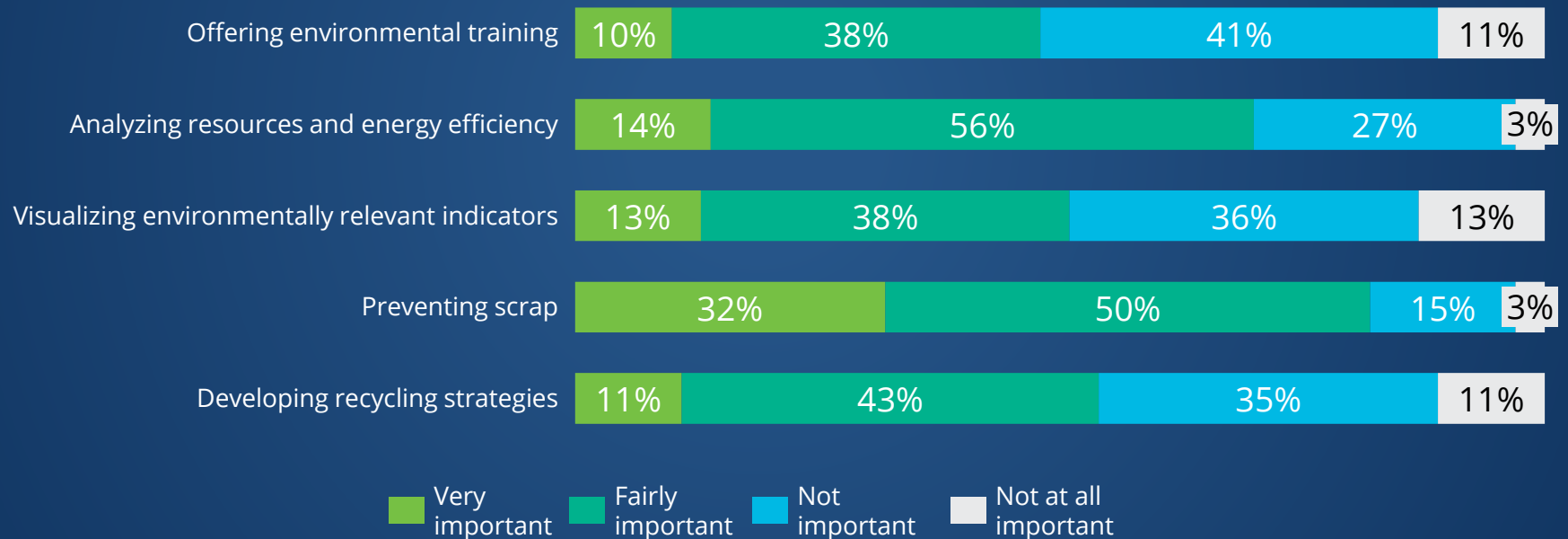
There are still snags in the **implementation** of ecological measures at many automobile companies

Which of the following ecological goals does your company pursue with regard to the use of resources?



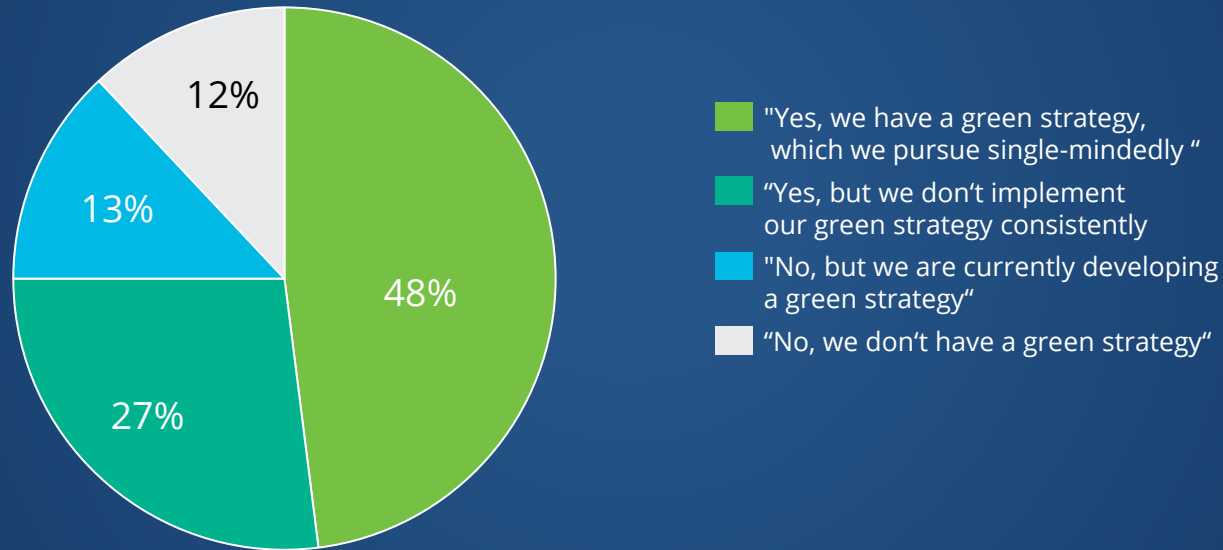
Energy savings is the **dominant eco goal** in the industry

How do you generally evaluate progress with regard to implementing the following ecological measures at your company?



Many companies are **still lacking** when it comes to ecological **strategy, KPIs, and trainings**

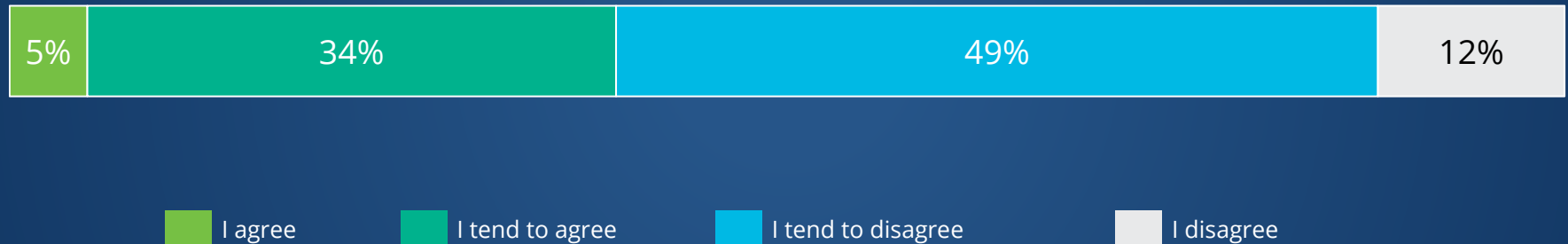
Does your company have a strategy for the path to the green transformation?



Not even every other company has an established **ecology strategy**

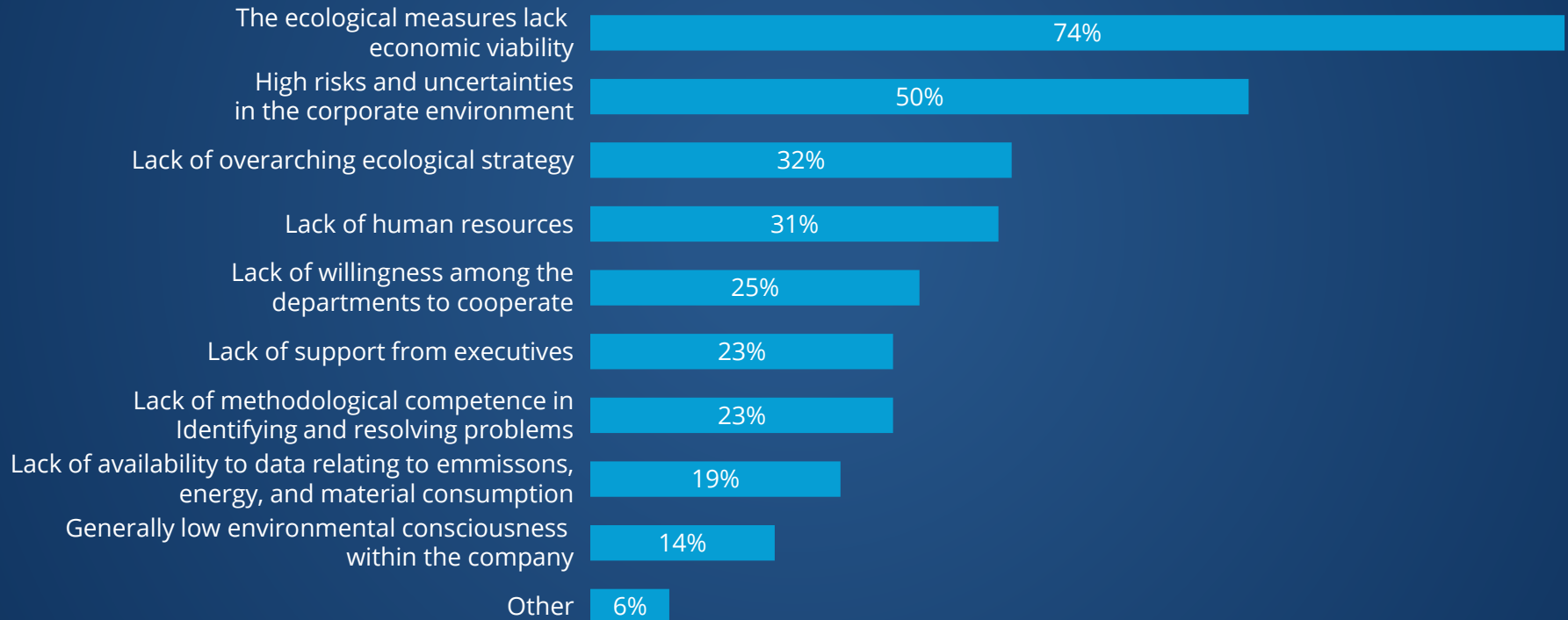
How do you evaluate the following statement?

"Our company accepts the additional costs of ecologically sustainable procurement"



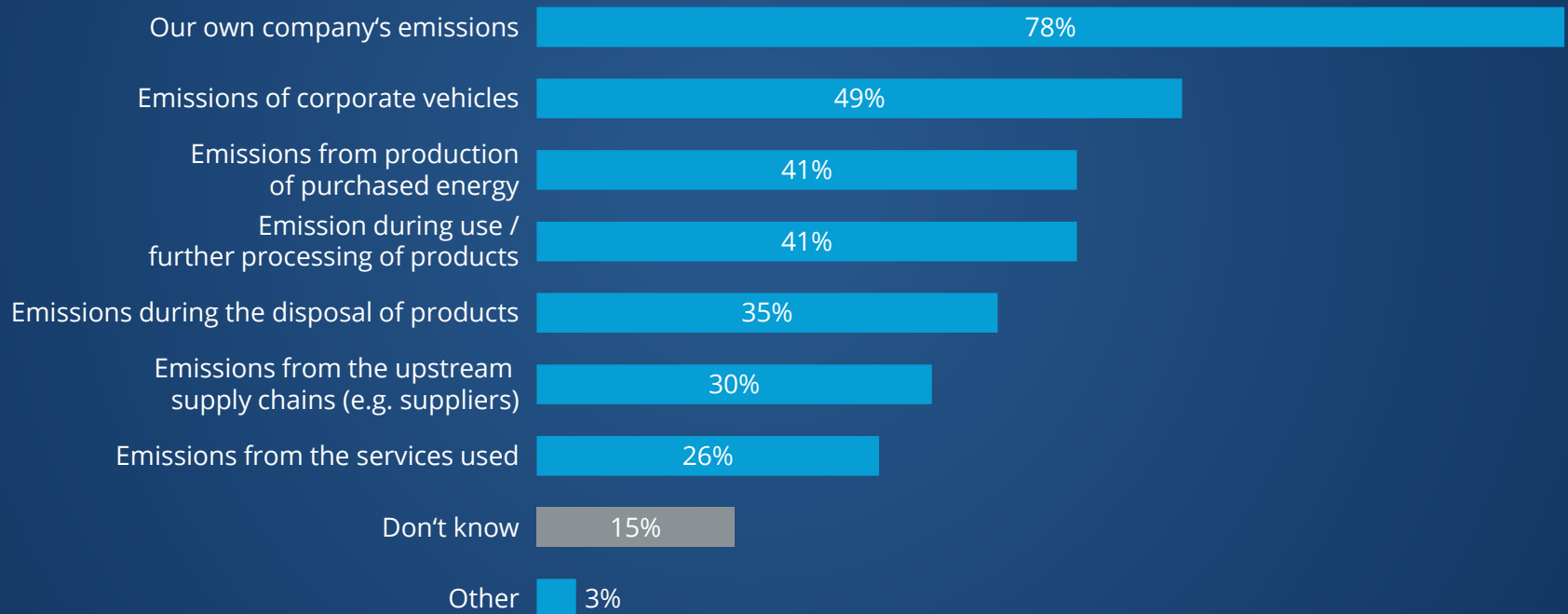
Only about one-third of companies are ready to accept higher costs for sustainability

Where do you see the greatest obstacles to a green transformation at your company?



Sticking point profitability: **ecological measures have not yet paid off** at many companies

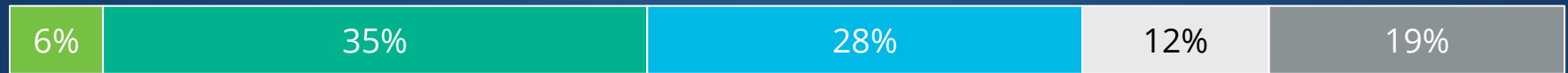
Which of the following emissions does your company consider when evaluating ecological loads?



Contemplating your ecological navel: with regard to the topic of **emissions**, many dimensions have been ignored thus far

How do you evaluate the following statements?

"Our suppliers actively cooperate with us for a green transformation"



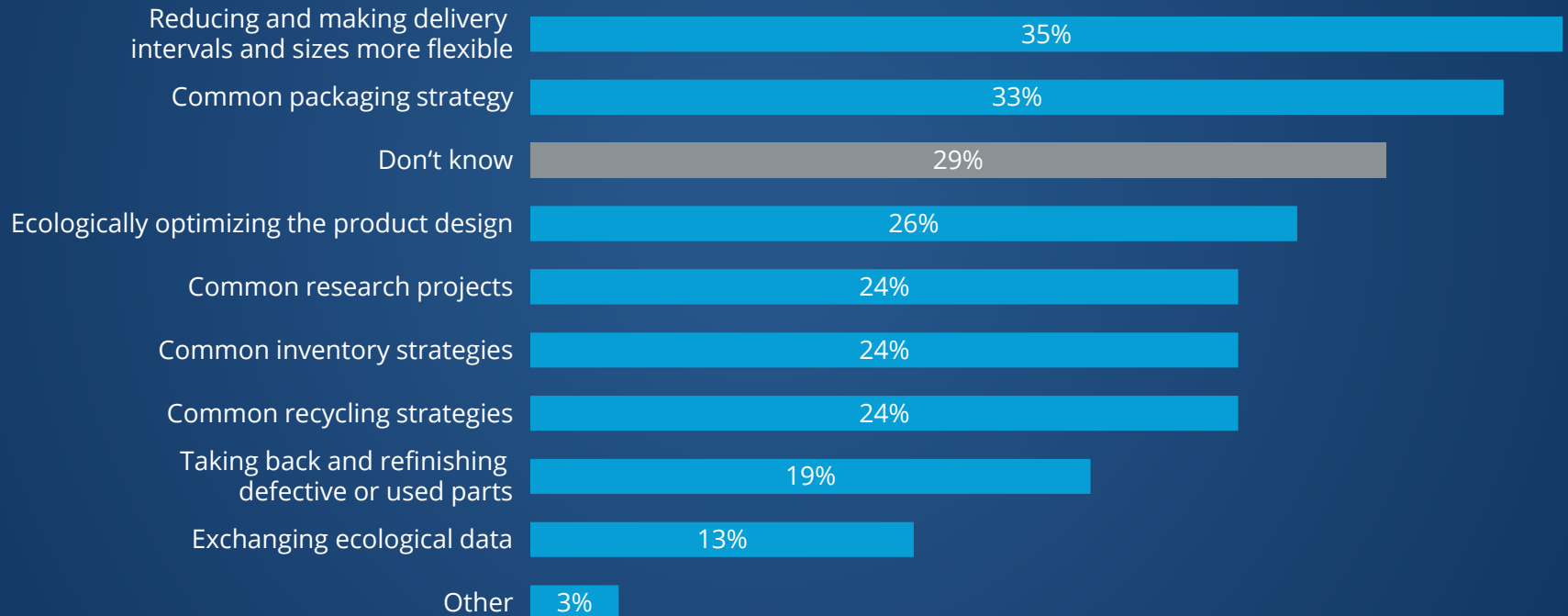
"Our customers actively cooperate with us for a green transformation"



I agree **I tend to agree** **I tend to disagree** **I disagree** **Don't know**

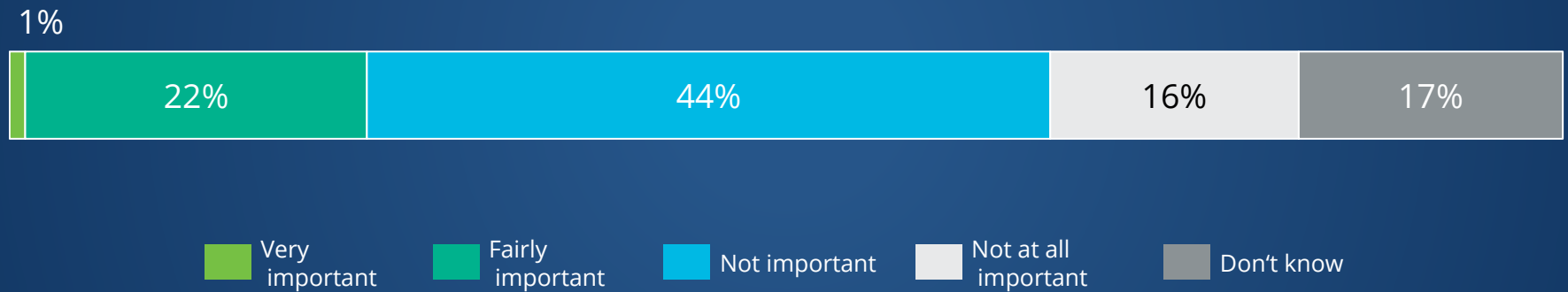
Room to improve: **suppliers and customers** could **cooperate better** with regard to the topic of ecology

What measures are you taking together with other participants in the supply chain with regard to the green transformation?



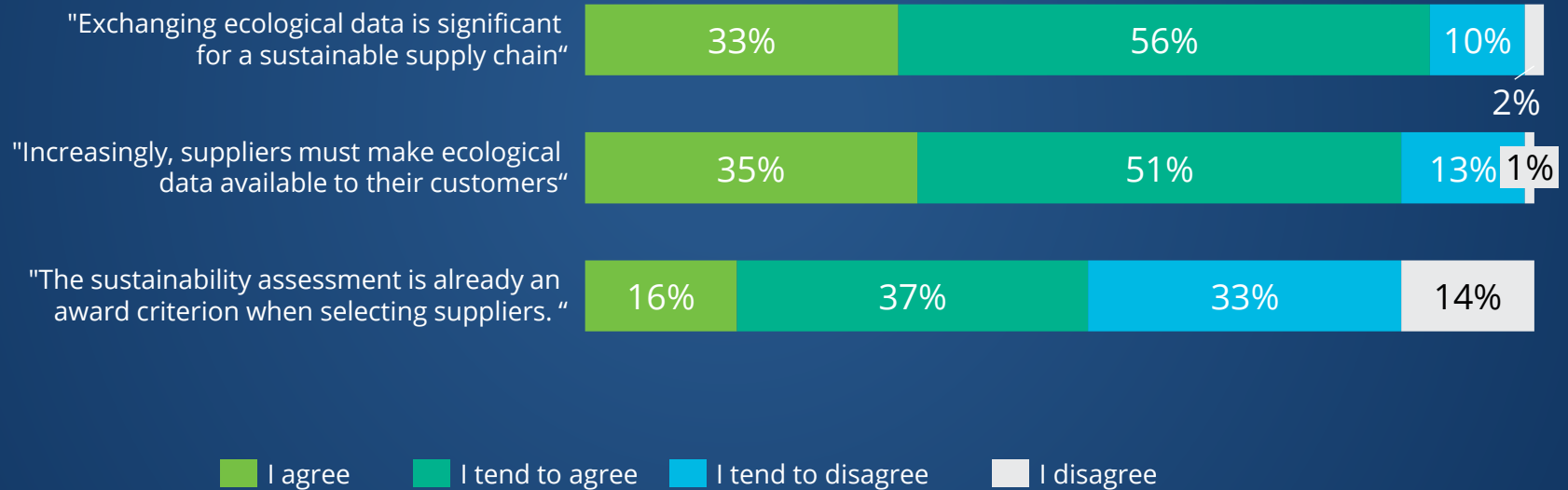
More intelligent logistics: the supply chain should become greener especially with regard to transport

How do you generally evaluate progress with regard to implementing improvement measures in your supply chain?



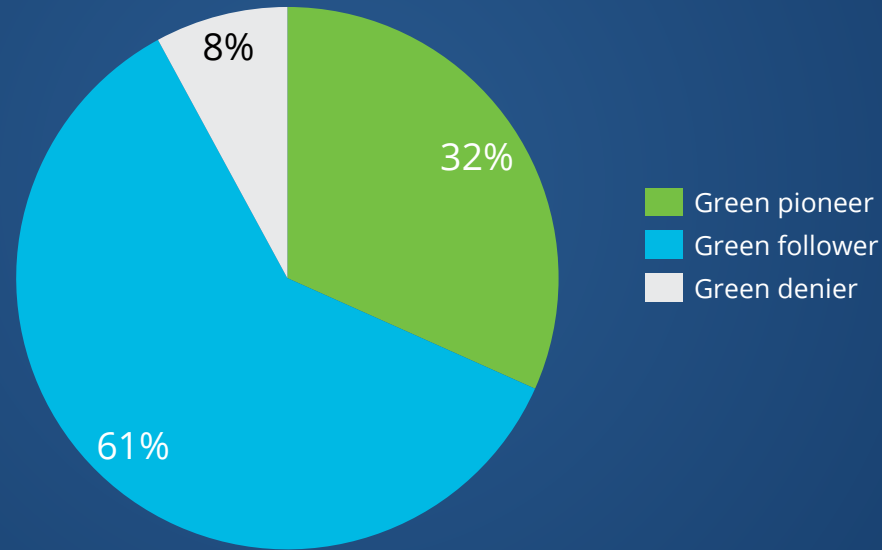
Only every fifth company has achieved **demonstrable successes** with regard to the topic **supply chain**

How do you evaluate the following statements?



Ecology meets digitalization:
Sustainability also relies on the
power of data

How would you assess your company on the path to the green transformation?



Green avant-garde: **every third automobile company** regards itself as an **ecological pioneer**

Green Awareness Index – to what extent have the individual companies recognized sustainability and ecology as challenges and which factors are driving the implementation.



Green Maturity Index – degree of maturity of individual companies' sustainability measures.



Both automobile manufacturers and suppliers **have great potential** for optimizing ecological measures



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STATISTICAL DATA

In which part of the automobile industry is your company involved?

OEM	42 %
Supplier	53 %
Other	5 %

What is your function in your company?

Management	10 %
Division / department management	37 %
Team / group management	15 %
Employee	32 %
Other	6 %

With what area at your company do you feel the most associated?

Research and development	24 %
Purchasing / Supply Chain Management	14 %
Production and logistics	35 %
Sales	11 %
Administrative areas	8 %
Other	9 %

How many employees does your company have?

< 300	8 %
300-3000	18 %
> 3000	74 %

What are your annual sales?

up to EUR 600 million	72 %
EUR 60 - 600 M	18 %
more than EUR 600 million	72 %

The **balanced participant structure** provides a realistic view of the German automobile industry

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INSIDE EVERY COMPANY
THERE IS AN EVEN BETTER ONE.

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