



Edition #17 – DATA DIGEST is CLEPA’s bi-monthly publication shedding light on the health and resilience of the European automotive supply industry through latest facts and figures

Automotive suppliers maintain steady progress on the road towards a more sustainable industry

European automotive suppliers continue implementing green and circular strategies, delivering tangible progress across key environmental metrics. Since 2021, the sector's leading 29 companies have reduced CO₂ emissions by 4.1 million tons¹, increased the share of renewable energy in its global energy mix to 40.2% and reduced absolute water consumption. These achievements come while production of motor vehicles globally has increased by 22%² between 2021 and 2023. Production growth did result in a slight increase of production waste, though the share of recycled or recovered production waste rose to a significant 86.5% in 2023.

Methodology notes: CLEPA analysed six key performance indicators (KPIs) from the non-financial reports of 29 companies showcasing the full range of automotive components. The KPIs assessed include Scope 1 & 2 emissions, energy use, renewable energy use, water use, waste generation and recyclable waste generation.

¹ This amount is based on a market-based approach, which calculates emissions based on the electricity organisations choose to purchase through contracts or instruments like Renewable Energy Certificates or Power Purchasing Agreements.

² Source: Oxford Economics.

It is worth to note that the companies analysed operate and report at a global level. Suppliers were selected to provide a representative picture of the EU automotive supply chain. The 29 companies represent the biggest suppliers operating in the EU, representing a sample of tier 1 and 2 suppliers, battery, semiconductor and tech suppliers.

What you will find in this edition

1 – Automotive suppliers reduce CO2 emissions, cutting 4.1 million tons since 2021

2 – Energy efficiency improves, as share of renewables continues to rise

3 – Automotive suppliers reduce total water consumption by 5.2% over two years

4 – Up to 86.5% of production waste was recycled in 2023

"A sustainable automotive industry requires collaboration to face complex challenges across sectors and throughout a deep supply chain. The steady increase in renewable energy use reminds us of what's possible if technological innovation meets improving regulations and industry commitment."



Nils Poel, CLEPA's Head of Market Affairs
CLEPA Data Digest #17 | December 2024

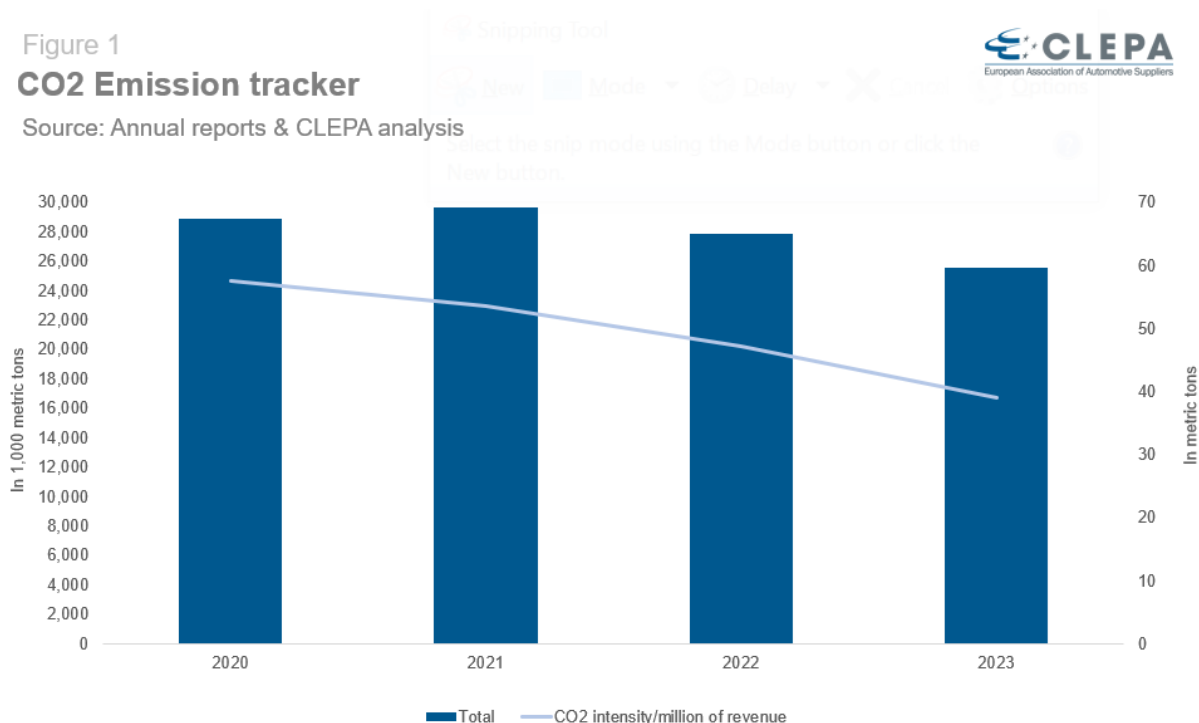
1 - Automotive suppliers reduce CO2 emissions, cutting 4.1 million tons since 2021

Between 2022 and 2023, automotive suppliers reduced their absolute CO2 emissions by 8.4%. This adds to a broader trend seen in the period since 2021, in which total emissions have dropped by 13.8%, amounting to a reduction of 4.1 million tons of CO2; more than the annual emissions of the city of Amsterdam.

The sector’s CO2 intensity (tons of CO2 per million euro revenue) has also decreased, falling from 53.6 tons per million euro of revenue in 2021 to 39 tons in 2023. High levels of inflation in 2022 and 2023 will slightly overstate the drop in CO2 intensity, but growth in vehicle production underlines how the sector has managed to reduce emissions, while increasing production.

Figure 1
CO2 Emission tracker

Source: Annual reports & CLEPA analysis

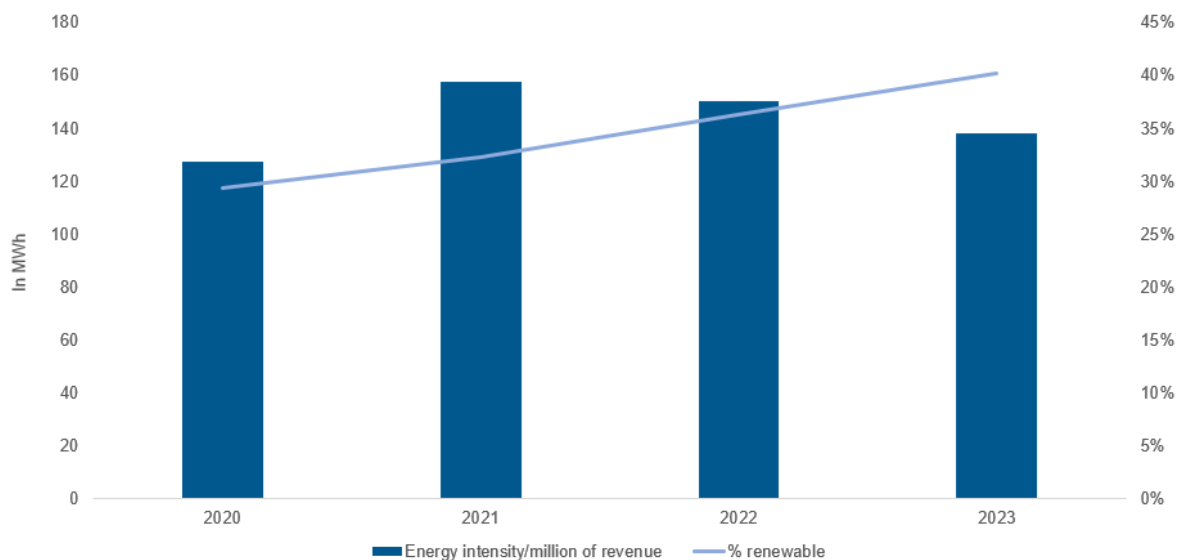


2 - Energy efficiency improves, as share of renewables continues to rise

The automotive supply industry has made progress in the transition towards renewable energy, with its share increasing from just 32.2% of total energy consumption in 2021 to 40.2% in 2023. In addition, energy intensity went from 157.4 MWh per million euro of revenue in 2021 to 138.3 MWh in 2023.

Figure 2
Energy use intensity and share of renewable

Source: Annual reports & CLEPA analysis



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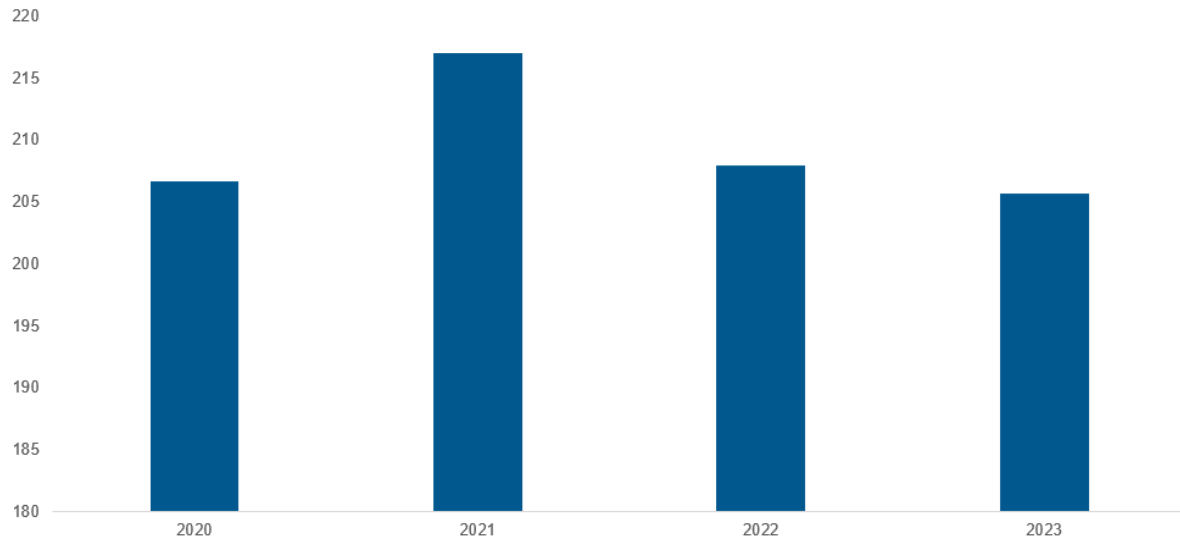
3 - Automotive suppliers reduce total water consumption by 5.2% over two years

Between 2021 and 2023, automotive suppliers reduced their water consumption by 11.3 million cubic metres, a decrease of 5.2%. In 2023, absolute water consumption dropped to 205.17 million cubic metres.

Figure 3

Total water use (in million m³)

Source: Annual reports & CLEPA analysis



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"The positive figures in this report demonstrate our sector's strong commitment to progress on the road towards a sustainable economy. However, we cannot ignore the pressing economic challenges we face. To maintain our capabilities to invest, we need a technology-neutral framework that fosters innovation across all decarbonisation technologies, alongside decisive actions to strengthen the EU's global competitiveness."



Benjamin Krieger, CLEPA's Secretary General
CLEPA Data Digest #17 | December 2024

4 – Up to 86.5% of production waste was recycled in 2023

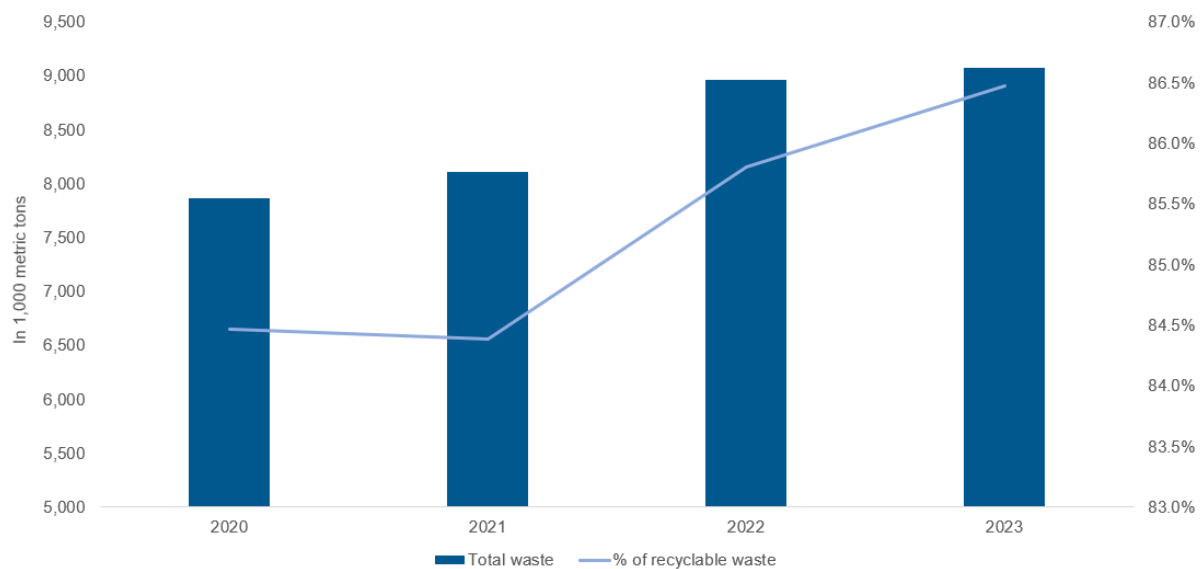
Between 2021 and 2023, the global automotive supply industry saw a 12% increase in total waste generation. This rise aligns with a 22% growth in motor vehicles production globally during the same period.

However, waste intensity, measured in relation to revenue, has decreased, showing improved efficiency in waste management practices. It should be noted that progress varies by region due to differences in recycling infrastructure and regulatory frameworks. Despite these disparities, the share of recycled or recovered waste has increased, rising from 84.38% in 2021 to 86.47% in 2023, reflecting incremental gains in waste management sustainability.

Figure 4

Total Waste & percentage of recyclable waste

Source: Annual reports & CLEPA analysis



Are you interested in knowing more?

Contact CLEPA Communications Team at communications@clepa.be

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