COMMERCIAL VEHICLE SHOW

LCV DECARBONISATION REPORT

OPERATORS IN ACTIVE ADOPTION PHASE

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EXECUTIVE SUMMARY

Decarbonisation in the light commercial vehicle (LCV) sector is no longer theoretical. The transition is already underway, with operators actively deploying electric vehicles across their fleets.

The data shows that electric vans now represent a meaningful proportion of fleet composition, and more than half of operators we surveyed. This indicates a market that has moved beyond early adoption and into real-world implementation.

However, this transition is not without friction. **Operators continue to face significant challenges, particularly around range, infrastructure, and payload limitations.** These factors are constraining the pace at which electrification can scale across all use cases.

At the same time, the market is not following a single trajectory. **While some operators are moving rapidly towards high levels of electrification, others expect minimal adoption by 2030**.

This reflects differing operational requirements, levels of readiness, and confidence in the supporting ecosystem.

A key characteristic of the LCV transition is the limited role of hybrid vehicles. Rather than acting as a stepping stone, **many operators are moving directly from diesel to fully electric vehicles where viable.** This creates a mixed fleet environment, where electrification is advancing selectively rather than uniformly.

Overall, the LCV sector can be characterised as being in a **phase of active transition**. The focus is no longer on whether to adopt electric vehicles, but on how to overcome the practical barriers that are limiting wider rollout.

RESEARCH METHODOLOGY

This report is based on a survey of 110 UK-based LCV fleet operators conducted by the Commercial Vehicle Show.

Respondents were asked a series of questions covering fleet composition, approaches to electrification, perceived barriers, future expectations, and confidence in achieving net zero targets.

The findings reflect a range of fleet sizes, industries, and operational requirements, providing a broad view of how the LCV sector is approaching decarbonisation in practice.

“Electric vans now represent a meaningful proportion of fleet composition, and more than half of operators we surveyed”

FLEET COMPOSITION AND CURRENT VEHICLE ADOPTION

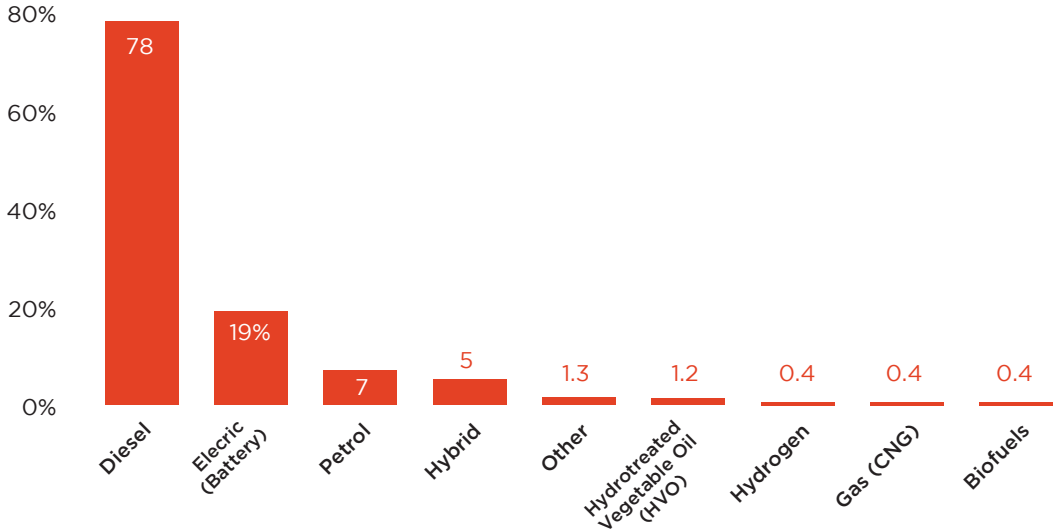
The LCV fleet remains predominantly diesel, accounting for approximately 78% of vehicles. However, electric vehicles now represent around 19% of the average fleet mix, making them the clear second-largest powertrain.

This is reinforced by adoption levels, with 55% of operators already running electric vans. Only a small proportion remain in a trial phase, indicating that the market has moved beyond experimentation and into active deployment.

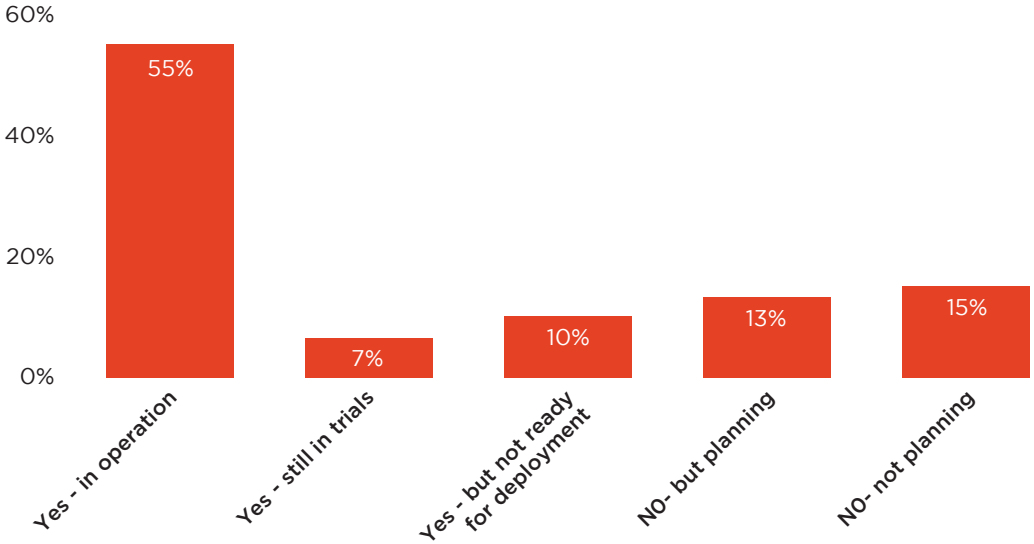
Hybrid vehicles, by contrast, account for a relatively small share of fleets. This suggests that operators are not widely adopting hybrid technology as an intermediary step between diesel and full electrification.

Instead, the data points to a more direct transition, with operators moving straight to electric vehicles where operationally viable.

What is the current make-up of your LCV fleet?



Have you trialled electric vans/LCVs?



*Figures represent averaged responses and may not total 100%.

ELECTRIFICATION STRATEGY: OPERATORS GOING DIRECTLY TO ELECTRIC

Operators' approach to electrification highlights **a clear preference for direct adoption.**

Almost half of respondents, at 47%, report that they are moving directly to fully electric vehicles. A smaller proportion are using plug-in hybrids either as a stepping stone or as a longer-term solution, while 20% have no plans to adopt electrified vehicles.

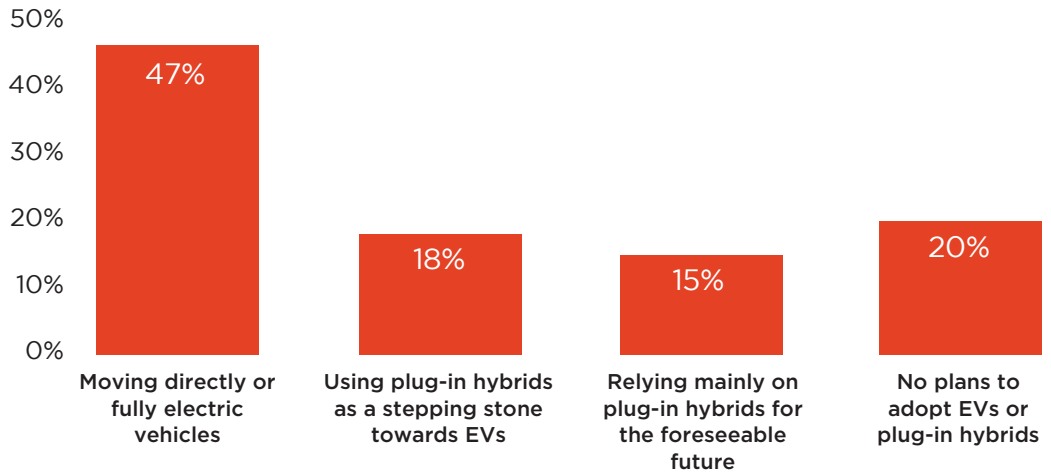
This indicates that the transition is being driven by selective deployment rather than gradual progression. Operators are identifying where EVs can already meet operational requirements and implementing them in those areas, rather than transitioning incrementally through hybridisation.

The factors influencing this transition reflect a combination of regulatory, commercial and operational pressures. Legislative pressure is the most significant driver, influencing 43% of operators, followed by Clean Air Zones at 35% and ESG targets at 33%. Operational savings (32%) and customer expectations (28%) also play a meaningful role, indicating that both **cost and client demand are shaping decision-making.**

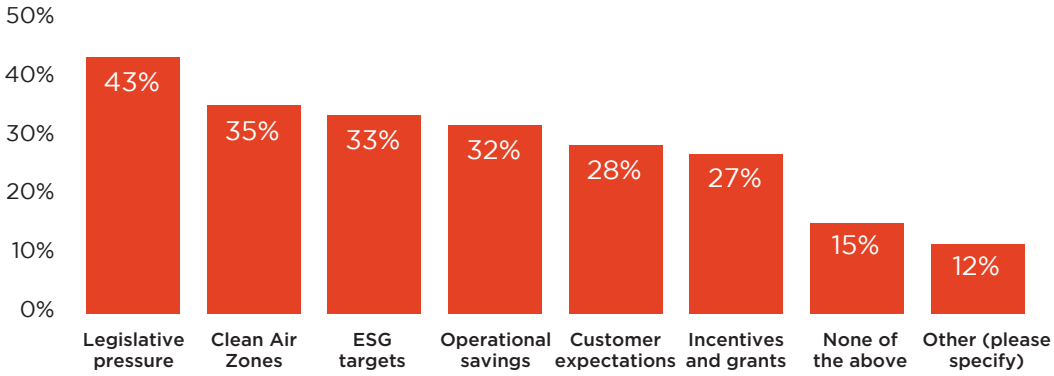
Operators also highlighted additional considerations, including vehicle price, residual values and internal company pressures, **reinforcing that the transition is being shaped by a complex mix of external requirements and internal business priorities**.

"Operators are identifying where EVs can already meet operational requirements and implementing them in those areas, rather than transitioning incrementally through hybridisation"

When transitioning your LCV fleet, what approach are you taking to electrification?



Which factors are most influencing your move toward decarbonasion?



*Note, respondents had multiple options to select any they felt applied.

VEHICLE SUPPLY AND SUITABILITY

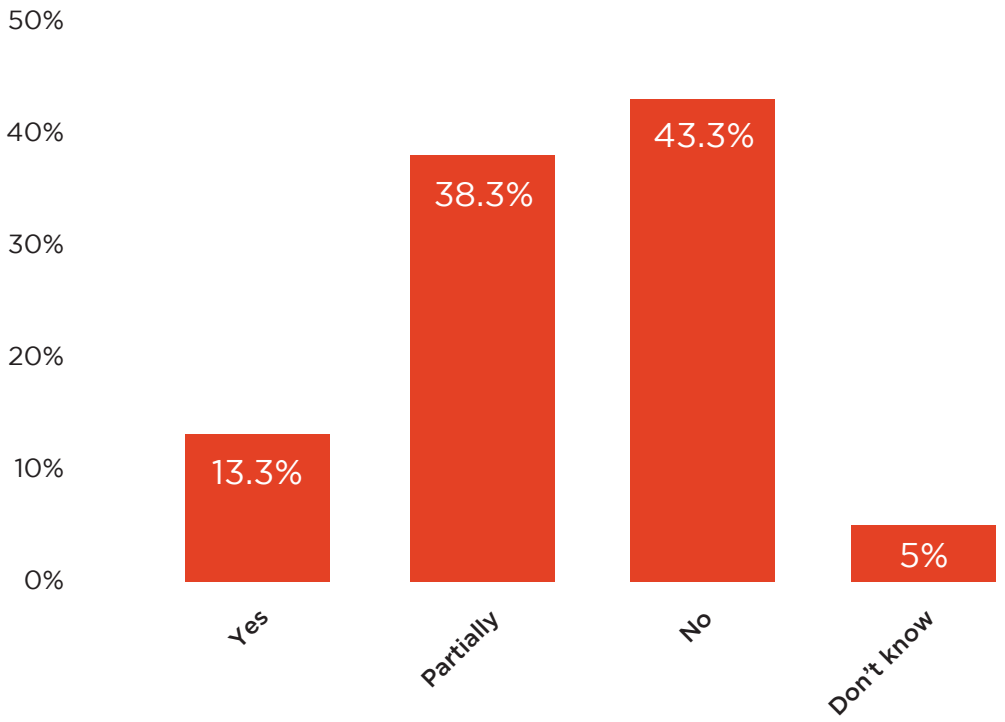
The availability of suitable electric vehicles remains a key challenge.

Only 13% of operators believe that current EV supply fully meets their operational needs, while 43% say it does not and 38% say it only partially does.

This suggests that adoption is often taking place within the limits of what is available, rather than being driven by fully optimised solutions.

Operator feedback also highlights challenges around accessing vehicles and securing demonstrations, indicating that the market, while advancing, is not yet fully mature.

Do you feel the current supply of electric vans/LCVs meets your current operational needs?



"Operator feedback also highlights challenges around accessing vehicles and securing demonstrations, indicating that the market, while advancing, is not yet fully mature"

BARRIERS TO ELECTRIFICATION

Despite strong levels of adoption, operators face a consistent set of barriers that are limiting further progress.

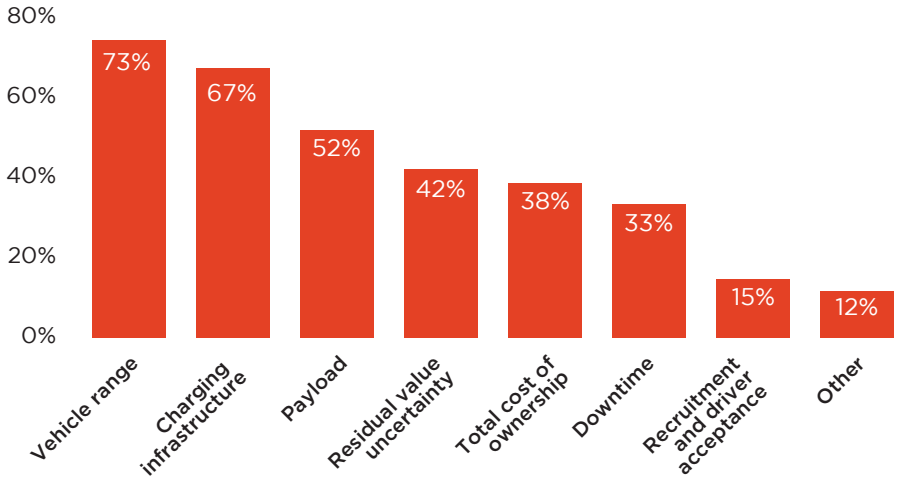
Range is the most widely cited issue, affecting 73% of operators. Infrastructure follows at 67%, while payload limitations are identified by 52%.

While Total Cost of Ownership (TCO) was cited as a barrier by 38% of operators, **55% believe that eLCVs are more expensive over the full lifecycle than diesel.**

These barriers reflect practical operational constraints rather than perception-based concerns. They directly impact vehicle suitability, efficiency, and productivity, and therefore play a central role in fleet decision-making.

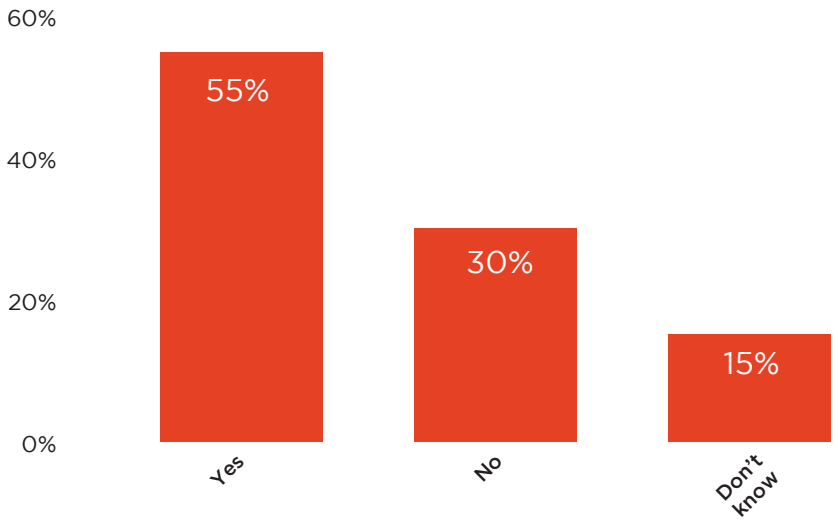
"These barriers reflect practical operational constraints rather than perception-based concerns"

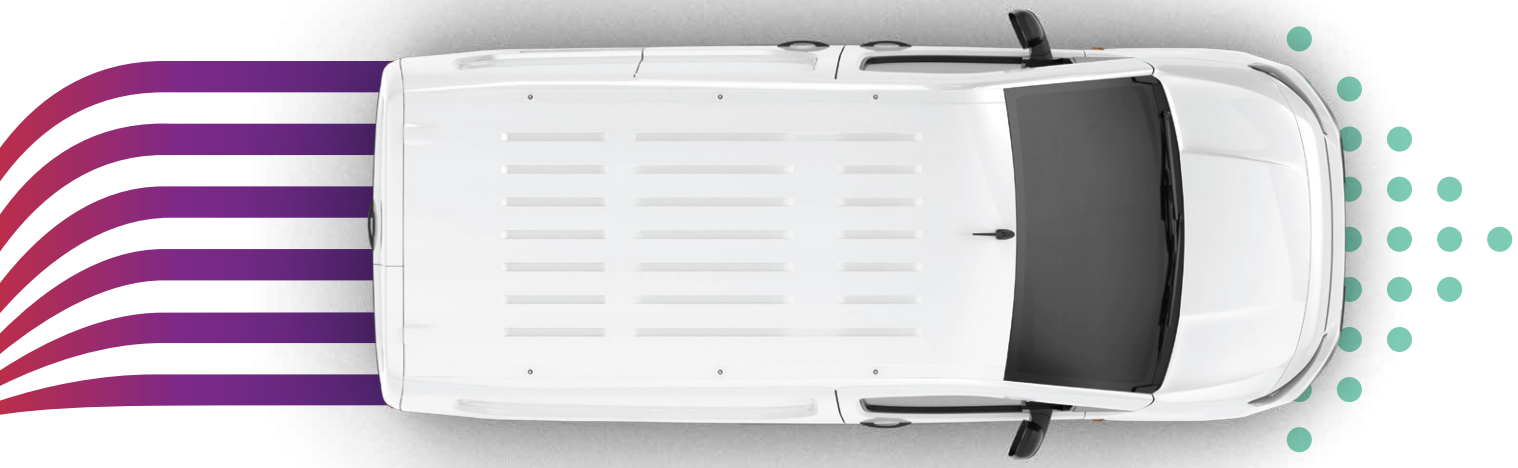
What are your biggest barriers to adopting electric vans/LCVs?



*Note, respondents had multiple options to select any they felt applied.

Do you believe electric vans/LCVs are currently more expensive than diesel over the full lifecycle (TCO)?





> **"Disconnect between the pace of vehicle adoption and the development of the supporting charging infrastructure required to sustain it"**

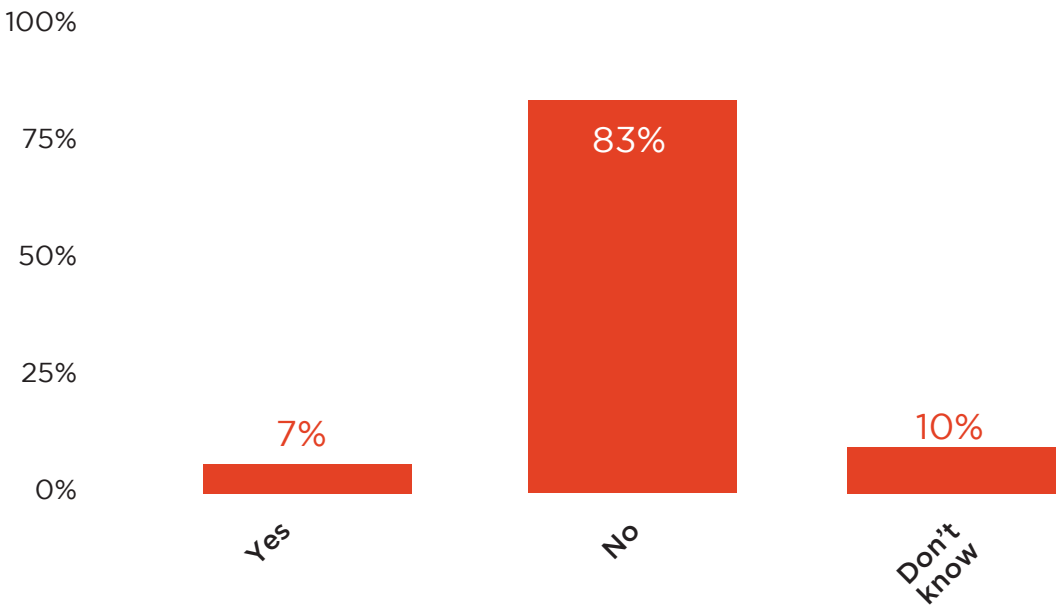
INFRASTRUCTURE CONSTRAINTS

Infrastructure is a major limiting factor in the LCV transition.

More than 83% of operators believe that not enough is being done to support charging infrastructure for commercial vehicles. Concerns include availability, geographic distribution, and cost.

This highlights a disconnect between the pace of vehicle adoption and the development of the supporting charging infrastructure required to sustain it.

Do you think there is enough being done to support LCVs with charging infrastructure?



FUTURE EXPECTATIONS AND CONFIDENCE

Expectations for electrification by 2030 are highly varied.

While 18% of operators expect their fleets to be fully electric, the largest single group, at 25%, expects EVs to account for just 0–10% of their fleet.

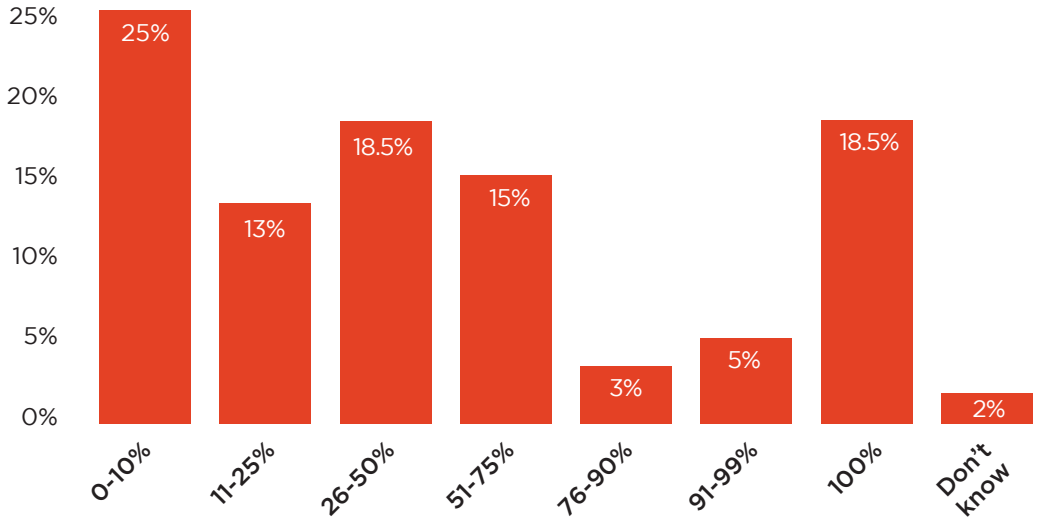
Around 2% of respondents report that they do not yet know what their fleet composition will be by 2030, suggesting that further education and clarity around how to effectively transition fleets is still required.

Confidence in achieving net zero by 2040 is similarly mixed, with a significant proportion (45%) of operators remaining unconfident, while just over a third (35%) are confident.

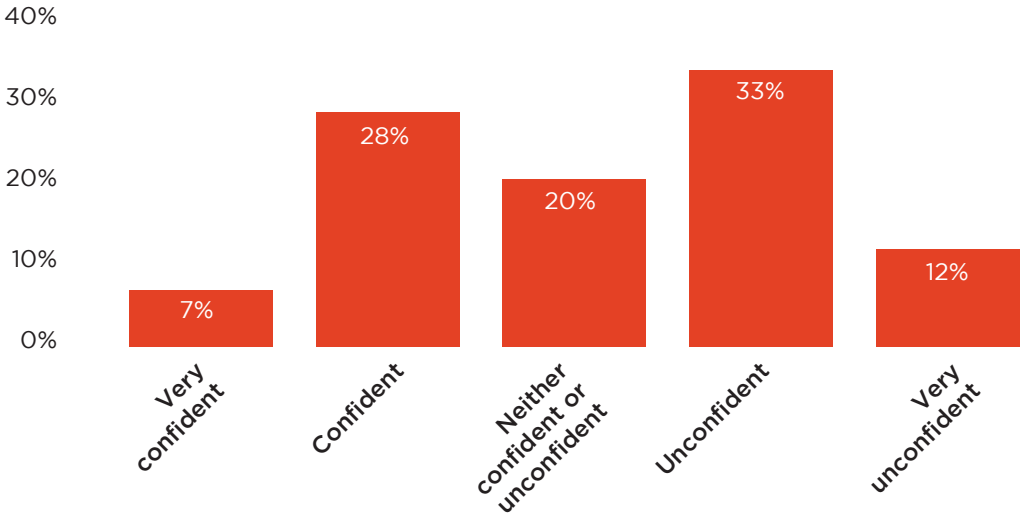
This reflects ongoing concerns around infrastructure, cost, and vehicle capability, which continue to shape expectations for the pace of transition.

"Confidence in achieving net zero by 2040 is similarly mixed, with a significant proportion (45%) of operators remaining unconfident"

What proportion of your LCV fleet do you expect to be electric by 2030?



How confident are you that the LCV sector will achieve net zero by 2040?



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