

An aerial, top-down view of a large parking lot. The lot is filled with hundreds of cars, mostly dark-colored, parked in neat rows. The parking spaces are marked with white lines, and some letters and numbers are visible on the ground between the rows of cars. The overall scene is a dense, organized grid of vehicles.

CAR INDUSTRY

**WORDS
VS
ACTIONS**

EXECUTIVE SUMMARY

GREENPEACE

KEY FINDINGS

Leading car brands are exploiting loopholes in EU CO₂ regulations for vehicles and focusing their marketing strategies on selling profitable, high-emitting fossil fuel cars in an extended last hurrah, thereby keeping consumers hooked on fossil fuelled models and delaying the transition to decarbonised mobility.

This report analyses the 7 biggest brands on the Belgian market and their online ads: Volkswagen, Peugeot, Opel, BMW, Renault, Mercedes and Ford, together accounting for 52.56% of sales in Belgium. These are the conclusions:

- The **long-term** direction is clear: 6 brands (Peugeot, Opel, Mercedes, BMW, Renault, VW) plan to sell at least 60% **full-electric cars** by 2030, with the first 3 aiming for 100% by 2025-30.
- **Short term** profit over climate: 5 brands (Ford, Peugeot, Volkswagen, Renault, BMW) still overwhelmingly **advertise fossil-fuel cars** (in more than 75% of their ads).
- Big car bullies: except for Opel, all the brands promote **high-emitting cars** (more than 130 g CO₂/km), partly relying on the only-on-paper low emissions of their hybrids to still achieve their European fleet target.

The [latest IPCC report](#) left no doubt about the climate emergency we now face. The earth is confronted with an “unprecedented” and “rapid” change that requires a rapid decrease of greenhouse-gas emissions due to human activity. The only way to do this is to urgently tackle the root cause of this massive pollution: the combustion of fossil fuels. As stated, since 1750, “of the 41 total anthropogenic CO₂ emissions, the combustion of fossil fuels was responsible for 81-91%”. Nevertheless, the fossil fuel industry aims to maintain its business model for as long as possible.

THE CAR INDUSTRY: PARTNER IN CLIMATE CRIME

By delaying a shift away from cars running on fossil fuels, the car industry remains a natural ally for fossil fuel companies. The car industry still relies heavily on fossil fuels. This makes it one of the biggest polluters on the planet, as stated in [this recent report from Greenpeace East Asia](#): “At a global scale, transportation is responsible for 24% of direct CO₂ emissions from fuel combustion, with passenger vehicles responsible for the largest chunk of these CO₂ emissions, at 45%”.

A rapid shift is needed away from car-centred mobility and spatial planning policies to better public transport, safe walking and cycling infrastructure, and shared mobility based on renewable energy, with electrification of the remaining fleet an important cornerstone of this transition.

Recent European regulations intend to force this shift to electric vehicles by setting constraining CO₂ targets for cars. However, this shift is happening too slowly, also in Belgium. In this [Statista ranking of 16 European countries](#), Belgium still has the greatest proportion of internal combustion engine (ICE) vehicles in its 2020 car sales. The share of electric vehicles is growing, and car manufacturers are paying a lot of lip service to electrification, but they are dragging their feet with regard to implementation.

After a long [history](#) of delaying climate action on car emissions by holding off legislation through a voluntary agreement with the EU Commission, the car industry undermined strong CO₂ targets by delaying and pushing for [loopholes](#) in the existing regulations. The NGO Transport & Environment [estimates](#) that these loopholes have prevented the sale of 840,000 battery electric vehicles (BEVs) across Europe in 2021, while no car makers would have reached their targets without exploiting them.

This is because car makers still predominantly count on heavily polluting fossil-fuel burning cars to boost their sales revenues¹. This is also evident from their marketing strategy.

ANALYSIS OF ONLINE ADVERTISING

Even with the 2022 Brussels Motorshow cancelled, (potential) customers are being bombarded by car ads and promotions. These ads often reveal the current priorities of the car industry, more than their stated long-term ambitions.

Since the importance of [social media advertising](#) has grown, Greenpeace used the [Facebook Ad Library](#) to analyse 686 advertisements of the 7 biggest brands on the Belgian car market on Facebook and Instagram, between October 2021 and December 2021. Together, these brands account for a majority of shares on the Belgian car market (52.56%): Volkswagen (11%), Peugeot (7.5%), Opel (7.3%), BMW (7.3%), Renault (6.8%), Mercedes (6.8%) and Ford (6.8%).²

We evaluated the “**eco-friendliness**” of the marketing strategy of these seven brands: Are they promoting battery electric vehicles (BEVs) or are they pushing for technologies that continue to rely on fossil fuels (ICE vehicles and hybrids)? And how polluting are the vehicles being promoted, i.e.: what are the average CO₂ emissions of the ICE cars they promote?

We also assessed the **coherence** of their advertising campaigns: are manufacturers sufficiently promoting technologies that will allow them to achieve their imposed EU CO₂ targets and their self-imposed goals (declarations about the future electrification of their fleet, cfr. below)?

GREEN INTENTIONS

As the table shows, it is clear that the manufacturers of the brands in our sample are aiming at a major shift to BEVs in order to comply with the EU CO₂ targets. Whereas their [sales numbers today](#) reveal a very low share of BEVs sold (between 9% for Renault and 2% for Ford), most of them have made strong promises regarding their ambitions to decarbonise their fleet in the near future.

| Classification | Group | Ambitions |
|----------------|------------|---------------------------------------|
| 1 | Peugeot | 100% electric by 2025 |
| 2 | Opel | 100% electric by 2028 |
| 3 | Mercedes | 100% electric by 2030 |
| 4 | BMW | 90% electric by 2030 |
| 5 | Renault | 65% electric by 2025 |
| 6 | Volkswagen | 60% electric by 2030 |
| 7 | Ford | 40% electric by 2030 |

Table 1. Stated ambitions regarding electrification

KEEPING THE FOSSIL-FUEL INDUSTRY AFLOAT

These bold ambitions, however, are not translated into the car companies' marketing strategy, a marketing strategy that would help the brands achieve their targets. Except for Mercedes and to a lesser extent Opel all of the brands in our sample **still predominantly promote cars relying on fossil fuels**³.

| Classification | Group | % of ads for fossil-fuelled cars | % of ads for BEVs |
|----------------|------------|----------------------------------|-------------------|
| 1 | Ford | 100% | 0% |
| 2 | Peugeot | 86,5% | 13,5% |
| 3 | Volkswagen | 82,5% | 17,5% |
| 4 | Renault | 78% | 22% |
| 5 | BMW | 77% | 23% |
| 6 | Opel | 50% | 50% |
| 7 | Mercedes | 39% | 61% |

Table 2. Ads promoting fossil-fuelled cars (ICE cars and hybrids) vs. BEVs.

Some of the brands focus on partially electrified cars: hybrid vehicles.

| Classification | Group | % of ads for hybrids |
|----------------|------------|----------------------|
| 1 | Ford | 59% |
| 2 | Peugeot | 45% |
| 3 | Renault | 34% |
| 4 | Opel | 24% |
| 5 | Mercedes | 15% |
| 6 | Volkswagen | 5,5% |
| 7 | BMW | 4% |

Table 3. Brands promoting hybrids

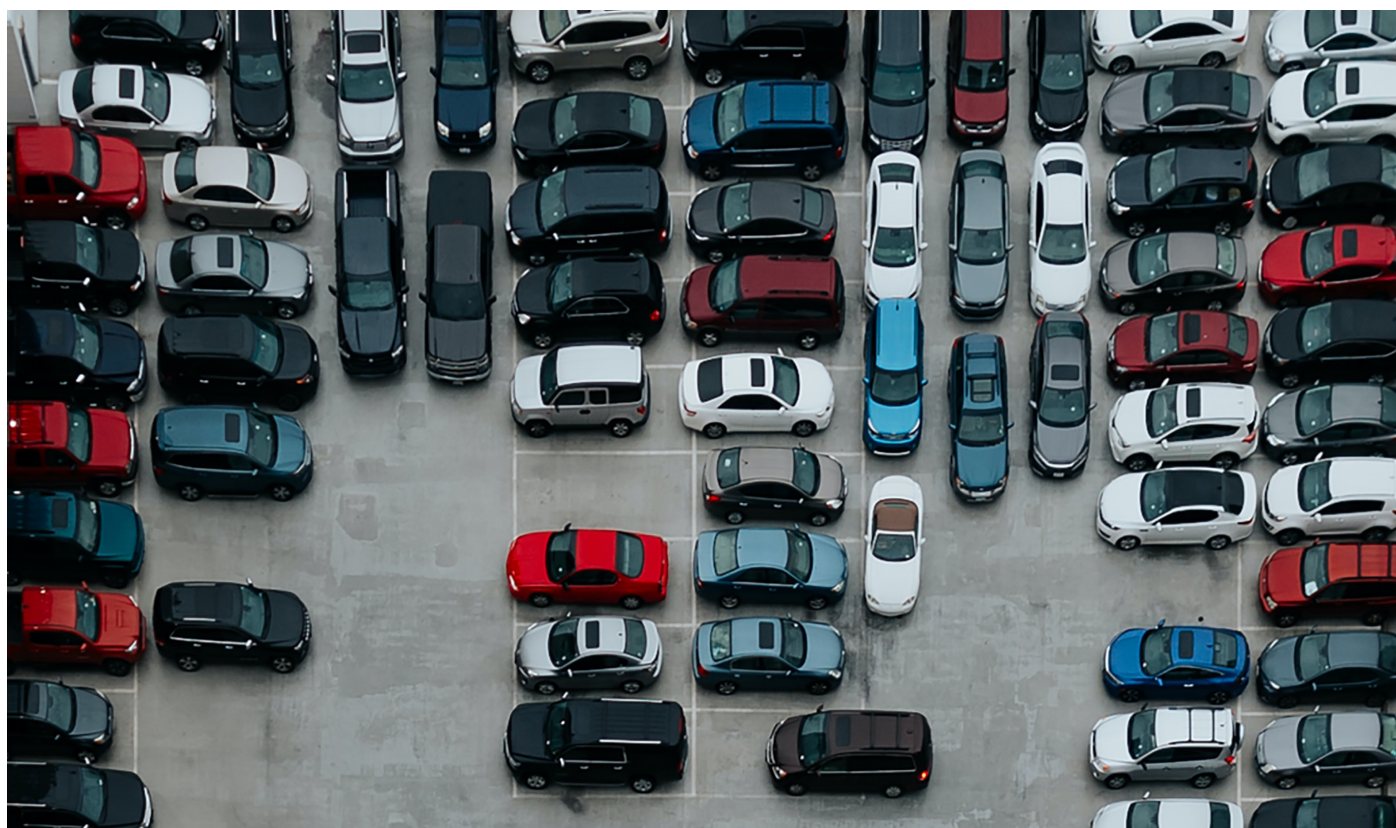
Hybrid cars are considered a false solution. They emit much more than officially assessed (see [this report from T&E](#)) and still consume polluting fossil fuels. In our sample, Mercedes and Opel are the only brands allocating a large share of their advertisements to battery electric vehicles. All the others are keeping the **fossil-fuel industry** afloat by still mainly promoting ICE and hybrid vehicles relying on fossil fuels.

FLOODING OUR STREETS WITH HIGH-POLLUTING CARS

Moreover, some brands specifically encourage potential customers to buy **heavily polluting cars**. Their advertised ICE fleet mainly consists of **high-emitting cars** (defined as emitting more than 130 g/km CO₂). Only Opel promotes ICE cars that are less polluting. All the brands in our sample promote ICE vehicles that on average are more polluting than their average CO₂ targets.

| Classification | Group | Average CO ₂ g/km of promoted ICE cars | Compared with their 2020 CO ₂ target |
|----------------|------------|---|---|
| 1 | BMW | 205 | +99% |
| 2 | Volkswagen | 162 | +67% |
| 3 | Ford | 158 | +56% |
| 4 | Mercedes | 154 | +51% |
| 5 | Peugeot | 132 | +43% |
| 6 | Renault | 130 | +41% |
| 7 | Opel | 118,5 | +34% |

Table 4. Average emissions of the promoted ICE cars vs. 2020 CO₂ targets.



PROFIT OVER CLIMATE

The marketing strategy of most car makers in our sample is not driven by change. It is focussed on profitability, which lies in high-polluting vehicles. The [Stellantis \(Peugeot and Opel Group\) annual report](#) gives a clear insight into the reasons why the car industry is still investing considerably in SUVs and other large ICE vehicles, stating that such vehicles have “historically been more **profitable** on a per vehicle basis than smaller vehicles”. Stellantis also argues that “newly introduced internal-combustion models are generally more profitable than older models” and that it remains important to flood the market with new ICE cars, specifically non “fuel-efficient vehicles”, since fuel-efficient vehicles have a “lower profitability per unit”. The report expresses concerns about the EU CO₂ regulations harming their business model, since BEVs are less profitable than ICE vehicles.

WORDS VS ACTIONS

If we confront the marketing strategy of the brands in our sample with their declared intentions regarding their shift to decarbonisation, we can assess those brands that are already **walking the talk** now and those that are **greenwashing**.

By assigning a **coherence rate**⁴, we assessed the gap between words (ambitions, declarations, see also background briefing) and action (promotion, ads).

| Classification | Group | Electrification ambitions | Advertisements promoting BEVs | Coherence rate |
|----------------|------------|---------------------------|-------------------------------|----------------|
| 1 | Mercedes | 100% | 61% | 61% |
| 2 | Opel | 100% | 50% | 50% |
| 3 | Renault | 65% | 22% | 34% |
| 4 | Volkswagen | 60% | 17,5% | 29% |
| 5 | BMW | 90% | 23% | 26% |
| 6 | Peugeot | 100% | 13,5% | 13,5% |
| 7 | Ford | 40% | 0% | 0% |

Table 5. Coherence of car manufacturers regarding their electrification targets

Mercedes is the most coherent while also among the most ambitious in its electrification goals.

Not only is its group (Daimler) aiming at 100% fleet electrification, it also emerges from the ranking as the brand planning to invest the most in the development of that technology (see Table 9 in background briefing). In the coherence rate ranking (see Table 5), it scores first, since it is adopting a marketing strategy that could hypothetically help it achieve 61% of its target already today.

Opel arrives second in our coherence ranking, as its marketing strategy would help it achieve already today 50% of its ambitious electrification target.

BMW and **Peugeot** are far behind their bold ambitions: while they announced respective electric fleet targets of 90% and 100% (placing them amongst the most ambitious car makers in this regard), including an investment worth one third of their annual sales revenue in technological improvements, their communications strategies do not seem to be aimed at getting people to actually buy their BEV models.

Renault, Volkswagen and Ford also have a low coherence rate, but they weren't ambitious to start with.

Even after announcing a heavy investment in electrification, **Ford** still has a very low electrification ambition of 40% of its fleet. In our sample, it does not advertise BEVs.

This is also the case for **Renault** and **Volkswagen**: after Ford, they are the brands with the weakest electrification ambitions, with respectively a 65% and a 60% fleet electrification goal and low investments (the lowest in our sample). This aligns with their relatively poor marketing priority for BEVs: only 22% and 17,5% of their ads in our sample.



CONCLUSIONS & RECOMMENDATIONS

Car manufacturers have had **decades of warnings** about the need to change their business models and transition away from petrol and diesel. As long as these companies rely on fossil-fuelled cars, the few electric cars they sell simply serve to give their brands a green sheen. Or even worse, to offset the rising emissions in their fleet due to increased sales of SUVs and other high-polluting vehicles. **Most car companies want to continue to sell as many petrol and diesel cars as they can, for as long as they can.**

Regulation-driven long-term ambitions of car manufacturers cannot conceal their present **priorities**: selling as many **lucrative polluting cars** as possible before binding CO₂ regulations will no longer allow such. The car industry has a long history of delaying climate action. Now it is finally being forced to shift away from fossil fuels, but the pace of this transition is much too slow to be aligned with the goal of limiting global warming to 1.5°C. This half-hearted approach also risks jeopardising a planned and just transition for workers in the automotive industry.

This analysis confirms that car manufacturers are dragging their feet, with loopholes and a marketing strategy that aims to **prolong the sales of fossil fuelled vehicles as long as possible**, especially the most polluting ones (with the highest profit margins).

In the light of the climate crisis, it is irresponsible to continue to bombard consumers with adverts for cars that will continue to spew GHG emissions into the atmosphere for at least a decade to come. In order to keep the 1.5°C target alive, we need **quick action**.

We can no longer allow the car industry to portray themselves as part of the solution to the climate crisis while still selling polluting vehicles powered by fossil fuels. We cannot continue to allow producers of fossil fuels or fossil-fuel products to bombard consumers with greenwashed advertising that prolongs the status quo for the sake of their own profits.

With a [European Citizen Initiative](#), Greenpeace and dozens of other NGOs are asking for an **advertising and sponsorship ban for companies that fossil fuels or products**. In order to advertise, companies should be required get in line with the objectives in the Paris climate agreement.

Policymakers in Belgium should not wait for Europe, but should follow the examples of cities and countries that are already taking steps to ban fossil fuel propaganda. In France, the new climate law takes a first step in this direction by banning advertisements for fossil fuels. In Amsterdam and Den Haag, fossil fuel ads have already been banned from public bus stops.

[1] Since such vehicles are more profitable than electric vehicles. See below.

[2] See [Febiac website](#), 2.C.6. Parc des voitures par marque.

[3] Opel is allocating half of its advertisements to fossil fuelled cars.

[4] This coherence rate is calculated by taking their declared target as a 100% reference point. Example: If Volkswagen aims to sell a 60% electric fleet by 2030, but is promoting only 17,5% of BEVs today, its coherence rate is 29%. That number represents how much of its target Volkswagen is achieving through its advertising strategy.

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