FOUR ACTIONS FOR FLEET LEADERSHIP:

Benchmarking the transition to zero-emission fleets

Environmental Defense Fund

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INTRODUCTION

In 2021, Environmental Defense Fund (EDF) introduced the four actions fleets must take to be sustainability leaders today, a framework outlining what credible leadership looks like. In 2026, EDF updated that framework, reflecting on ways the zero-emission transportation landscape has evolved and illuminating ways companies can create a level playing field for sustainability leadership, as well as an environment where those efforts are rewarded. This report builds on that call to action, examining how the top 100 largest fleet-owning companies in the U.S. are performing against the four actions:

1. **Commit to becoming a zero-emission fleet**
2. **Share a transition plan with clear milestones that prioritize community health**
3. **Deploy zero-emission solutions today and share learnings and key challenges**
4. **Use policy and industry engagement to make sustainability commitments achievable and durable.**

Since the framework was introduced in 2021, the zero-emission vehicle (ZEV) landscape has shifted dramatically. Deployment volumes have increased, vehicle options have expanded and infrastructure investments have accelerated. At the same time, market and policy conditions have grown more complex. To understand how fleets are responding to these changes, EDF released an updated commitment tracker in early 2026, analyzing the publicly stated transportation and emission goals of the top 100 largest fleets in the U.S. After several years of progress by fleet-owning companies, this report applies the updated 2026 leadership framework to evaluate how public commitments translate into credible transition planning, deployment and industry engagement. This report highlights measurable progress and identifies where stronger alignment is needed to create a zero-emission transportation future by 2040. Below, we examine progress made towards the four actions with today's realities in mind.

1 Commit to becoming a zero-emission fleet

The 2026 Fleet Leadership Framework calls for fleets to commit to a full zero-emission transition with clear, time-bound goals. Many fleets have set strong zero-emission commitments since the original Fleet Leadership Framework was released in 2021, but there is still more work to do. A commitment defines the end state and timeline of a fleet's decarbonization goal; it does not, on its own, describe how that goal will be achieved, which is the role of a transition plan.

To assess alignment with this principle, EDF analyzed the publicly stated sustainability goals of the top 100 fleets[1] in the United States.

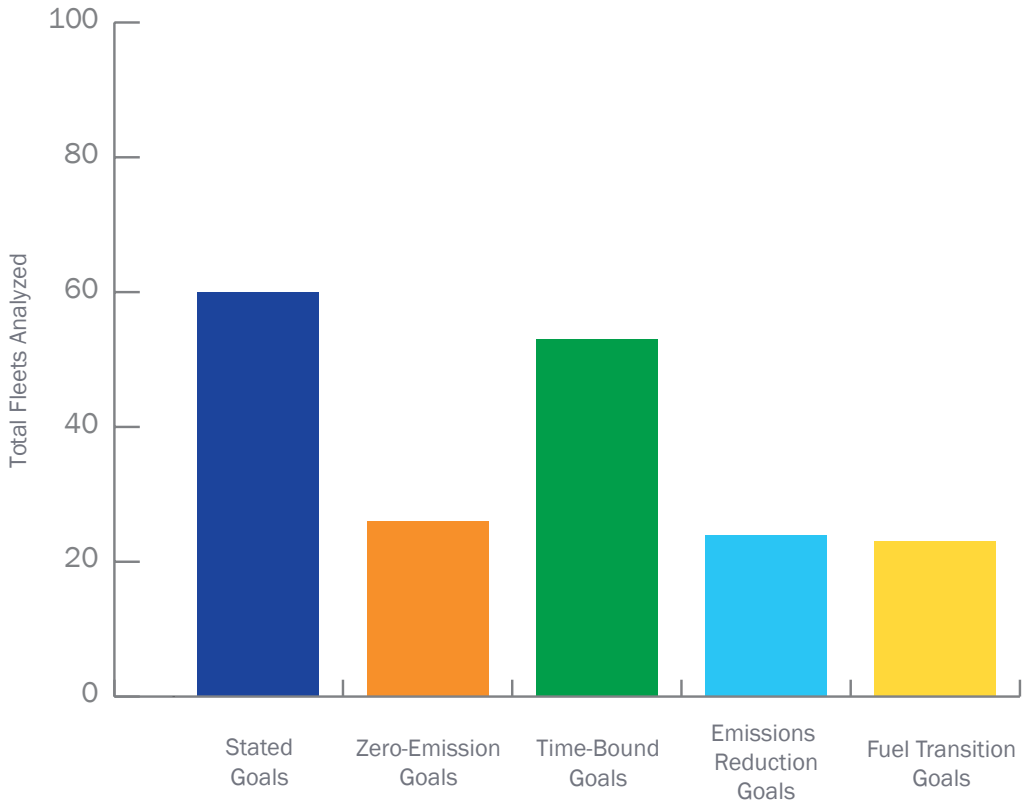
Zero-Emission Progress

Of the 100 companies analyzed, 60 have publicly stated commitments relating to sustainability in transportation, and of those 60, 26 have set a target to become a zero-emission fleet, either through fleet electrification or net-zero/carbon neutral operation commitments. Net-zero operations for large fleets require meaningful reductions in fossil fuel use. Reducing fossil fuels cuts both greenhouse gas emissions and harmful tailpipe pollution, which disproportionately affects communities near freight corridors.

FIGURE 1

Sustainability Commitment Metrics

Common metrics or pathways mentioned in fleet sustainability goals.



1 See the methodology section for information on how a top fleet has been defined.

An additional 24 fleets have made a commitment to reduce their carbon or greenhouse gas emissions along their value chain, with the average emissions reduction target being 37% (excluding net-zero/carbon neutral commitments). Emissions reduction goals were largely centered around Scope 1 and Scope 2 reductions, while Scope 3 emissions, often linked to contracted transportation and supply chains, were less frequently addressed. Several fleets referenced supplier engagement as a pathway to reduce Scope 3 emissions.

A range of fuel options and strategies were mentioned as a way to achieve emissions reduction and zero-emission goals. Electrification was mentioned by 13 fleets, but the strategy for implementation varied. Companies that own fleets set targets to electrify anywhere from 20 to 90% of their vehicles, while some focused on converting a total number of vehicles instead of a percentage of their total fleet. Additionally, several fleets focused on adding charging capacity rather than setting a conversion target. Some companies declared goals to invest in alternative fuels without providing a clear plan of action or specifying implementation pathways to achieve them, which underscored the importance of pairing commitments with transition plans.

Timeline

The majority of companies with stated goals included a time-bound component in their commitments. Of the 100 analyzed fleets, and the 60 with stated commitments, 53 set a target date to achieve their commitments. That is 88% of fleet-owning companies with public commitments including a time-bound component. The dates range from the current year to 2050, with 2025-2030 being the most stated range. 92% of fleets with time-bound goals had at least one interim goal set for 2035 or earlier.

Of the companies striving for net-zero or carbon neutral operations, nearly half stated 2050 as their target date, while the other half set a goal to reduce their emissions sooner. Overall, only 26% of fleets are committing to reducing carbon emissions to zero by 2050.

All fleets that stated a commitment to electrifying their fleet had at least an interim goal for electrification set for 2035 or sooner. In many cases, fleets defined at least one clear fleet electrification milestone with a target date of 2035 or earlier, though several fleets also defined broad net-zero or carbon neutral operations by 2050.

60%

of the top U.S. fleets have transportation-related sustainability goals

Implications

The growing number of commitments among fleets provides a solid foundation to move toward zero emissions by 2040. 60% of the top U.S. fleets have transportation-related sustainability goals, with nearly all including a time-bound component, demonstrating that fleets are taking the zero-emission transition seriously with interim progress being prioritized. The data shows the transition to zero-emission fleets is underway — but the pace is not fast enough.

Of the top 100 fleets, only 26% have committed to fully transitioning to zero-emission vehicles, while 40% have no public transportation sustainability goals at all. While there has been progress, there is a substantial commitment gap that threatens progress toward a cleaner, healthier future. Strengthening and expanding time-bound zero-emission commitments remains essential to aligning fleet operations with long-term decarbonization objectives.

We call on fleets to:

1. **Commit to a zero-emission future:** Create a transition plan that includes setting public, time-bound zero-emission commitments by 2040 at the latest, with clear interim milestones to ensure accountability.
2. **Close the commitment gap:** Fleets without public goals must develop and disclose transportation sustainability plans.
3. **Accelerate implementation:** Fleets already working toward individual scope or partial reductions should upgrade their targets to fully phase out fossil fuels. This includes charging and fueling infrastructure and investing in zero-emission trucks and clean energy solutions now.

Company feature: NFI Industries

NFI Industries provides an example of how fleets can establish clear, time-bound commitments to transition to zero-emission operations. The logistics company has set a goal to operate the first 100% zero-emission drayage fleet in the United States, signaling a long-term commitment to eliminating emissions from its freight operations.

While the overarching goal is not tied to a specific end date, this commitment is supported by several time-bound interim goals. These include putting 100 new zero-emission trucks into service by 2024, incorporating 150 lithium-powered material handling equipment units by 2024 and conducting a six-year pilot program of a fully electric Class 8 fleet on the east coast.

By pairing an ambitious long-term objective with measurable interim goals, NFI illustrates how fleets can define a clear end state for their transition while building momentum through near-term progress.[2]

2 NFI Industries. Sustainability Report 2023. 2023.

2 Share a transition plan with clear milestones that prioritize community health

While commitments define where a fleet intends to go, a transition plan defines how it will get there. A credible transition plan translates ambition into an operational pathway with defined milestones, sequencing and accountability. Every individual fleet is different and will need to adopt unique strategies on their zero-emission journey. However, standardizing commitment language and establishing best practices in goal setting will help the entire industry stay accountable and on track.

Across the 100 fleets analyzed, there was significant variation in ways companies articulated their set goals. While some fleets provided detailed, measurable transportation pathways, others defined broader sustainability language without clear specificity.

Clear Milestones

A strong transition plan will address the different areas where emissions exist along the value chain and present pathways to reduce or eliminate them, as well as communicate progress and results. This may look like:

- Interim deployment targets tied to capital replacement cycles
- Defined timelines and sequencing of vehicle replacement
- A technology and emissions pathway to achieve net-zero or zero-emission goals, including how Scope 3 emissions will be addressed
- Infrastructure and charging strategies
- Presenting defined metrics and reporting mechanisms

Across commitments, some fleets articulated measurable electrification targets such as "electrify 100% of heavy-duty vehicles," or "reach net-zero fleet emissions by 2040." These goals provide clarity and enable accountability metrics that can be systematically implemented, measured and shared through a company's own reporting or through a third party such as CDP disclosure. Stating interim goals, such as fleet electrification by 2035 and net-zero operations by 2040, is another way to develop a clear path to achieving sustainability goals.

Commitments that could not be easily measured or were too vague to categorize included language such as "committed to making progress," or "striving to implement the best technology." This can be a good place to start, but a detailed plan with clear, measurable goals will be needed to make real progress toward a zero-emission future. Fleets that are considering setting sustainability commitments or improving their current goals should invest in developing concrete pathways for zero-emission adoption and strategies to decarbonize the fleet. The presence of a commitment does not necessarily indicate a defined implementation strategy. Transition planning is what converts targets into coordinated action.

Prioritizing Public Health

The 2026 Fleet Leadership Framework emphasizes prioritizing public health in zero-emission transition plans to guide and prioritize fleet sustainability planning. Although diesel trucks have a disproportionate impact on communities near freight corridors, ports and logistics hubs, among the 100 commitments analyzed, public health outcomes were rarely referenced explicitly. Incorporating public health metrics into transition plans can

strengthen decision making, guide deployment prioritization and demonstrate broader community impact beyond emissions reduction alone.

Implications

Fleets with detailed transition plans are better positioned to align capital investment, pursue grant funding and anticipate operational constraints. A transition plan with clear metrics and defined pathways supports internal accountability and external transparency. This is also important for fleets that are striving toward net zero, particularly to ensure net-zero efforts deliver on their promise to deliver high-integrity emissions reductions.

As fleets expand commitments, the strength and specificity of transition planning will determine how effectively those commitments translate into durable emissions reductions.

We call on all fleets to:

1. **Set strong goals:** Transition plans should focus on the pathways and strategies required to meet stated commitments. Use clear, measurable language in sustainability commitments with ambitious milestones. Fleets with measurable, time-bound goals are more likely to share progress and stay accountable to their own commitments.
2. **Prioritize strong metrics:** This includes sequencing vehicle replacement across capital cycles, identifying technology and fuel choices, planning infrastructure investments, outlining approaches to address hard-to-capture emissions such as Scope 3 and defining governance and reporting mechanisms that track progress over time.
3. **Prioritize public health and community benefits in decision making:** Incorporate public health outcomes and community impact metrics into fleet sustainability commitments; use tools to identify communities impacted by fleet operations for priority electrification; invest in training and job opportunities for surrounding communities; highlight the social and health benefits of zero-emission fleets to strengthen stakeholder support and demonstrates broader value beyond emissions reduction.

Company Feature: US Foods

US Foods provides an example of how a fleet can translate sustainability commitments to actionable transition planning. The company has set a goal to reduce Scope 1 and Scope 2 emissions by 32.5% by 2032, establishing a measurable milestone for reducing emissions across its operations.

To support this goal, US Foods has begun identifying operational pathways to reduce transportation emissions. This solution includes adding 30 electric vehicles (as of 2024) and strategically using alternative fuels to lower emissions for near-term reductions. Additionally, US Foods has outlined steps to address Scope 3 emissions, by working with suppliers to set science-based emission reductions targets by 2027.

By pairing emissions targets with defined strategies for deployment, supplier engagement, and operational change, US Foods illustrates how transition planning can translate sustainability commitments into practical action.[3]

3 US Foods Holding Corp. US Foods 2024 Sustainability Report. 2025.

3 Deploy zero-emission solutions today and share learnings and key challenges

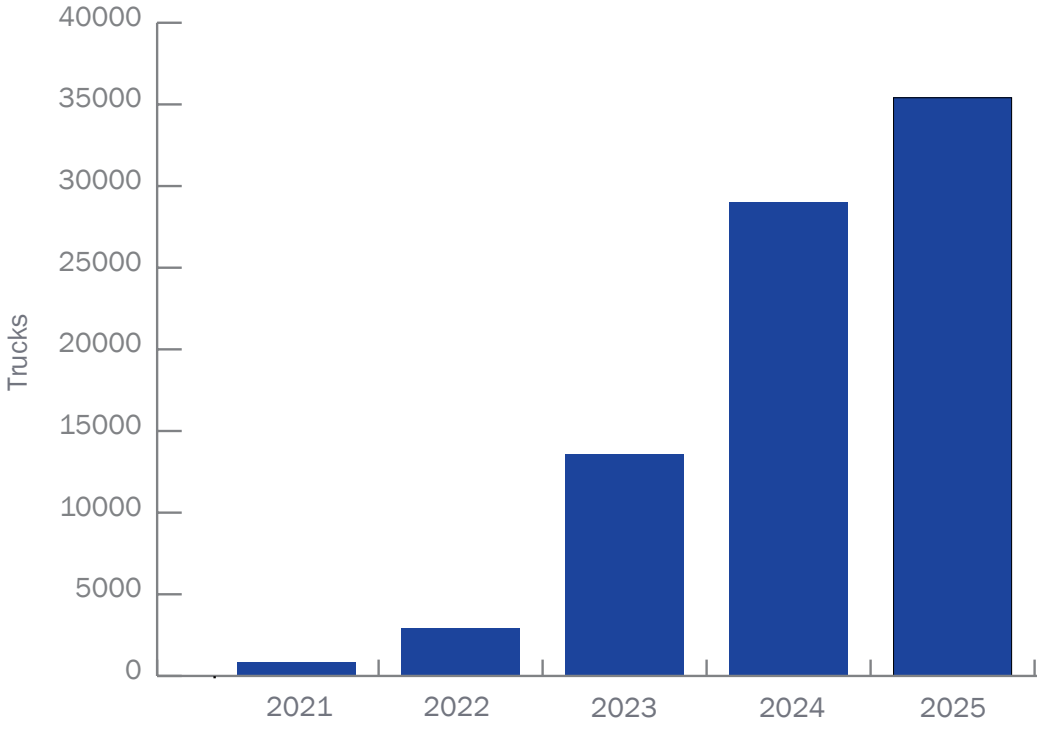
Since 2021, the medium and heavy-duty electric vehicle market has continued to advance in measurable ways. 2023 and 2024 were both record years for electric truck deployments, with over 10,000 class 2b-8 trucks being deployed in 2023, and over 15,000 trucks being deployed in 2024. In 2025, over 9,139 electric trucks were announced as deployed. While this is a slight drop from 2023 and 2024, it is still the third highest year for electric deployments over the past decade.

Since the introduction of the 4 Actions Leadership Framework, there were approximately 800 electric truck deployments catalogued in EDF's Electric Fleet Deployment & Commitment tracking tool. Today there are over 35,000, reflecting a maturing market that will require continued momentum to sustain.

FIGURE 2

Cumulative Electric MHD Truck Deployments (2021-2025)

Cumulative medium- and heavy-duty electric truck deployment announcements.



Fleets are making the transition to electric trucks, and maintaining this momentum is essential as market conditions and policy landscapes continue to evolve. Real-world deployment plays a critical role in advancing the transition by generating operational data, identifying challenges and informing future investment decisions.

Sharing insights from deployments, including both successes and challenges, can help reduce uncertainty for other fleets and accelerate broader industry adoption. Continued investment in electrification and other zero-emission technologies will also be essential to sustain progress and build confidence in the long-term transition.

We call on all fleets to:

1. **Deploy zero-emission technologies:** There are many options across use cases and applications to deploy ZEVs. Fleets should analyze their current fleet needs and assess where electric vehicles can best fit into their operations today.
2. **Invest in the future:** Fleets must invest in charging and infrastructure framework to make deploying ZEVs easier. Faster and easier access to infrastructure is imperative to keeping goals on track and setting stronger commitments.

Company Feature: PepsiCo

PepsiCo provides an example of how early deployment can generate operational experience and inform broader fleet electrification strategies. The company has committed to achieving net-zero emissions by 2050 and reducing emissions by at least 40% by 2030.[4]

As part of this effort, PepsiCo has been sharing their journey since the announcement of 100 Tesla semis ordered in 2022, with 50 in service by 2025, accruing nearly $1 million in fuel savings. PepsiCo expanded their electric vehicle operations in 2025 by adding 75 Ford E-Transit vans to California operations.[5]

By deploying vehicles across different use cases and sharing early operational insights, PepsiCo illustrates how fleets can build practical experiences that inform future electrification efforts.

4 PepsiCo. 2024 ESG Performance Metrics. 2025
5 Carranza, Alejandra. "PepsiCo Expects Nearly $1M in Fuel Savings for Its EV Semitrucks." Trucking Dive, 10 June 2025.

4 Use policy and industry engagement to make sustainability goals achievable and durable

The 2026 Fleet Leadership Framework recognizes that no fleet can scale a zero-emission transition alone. Durable progress depends not only on internal commitments, plans and deployment, but also on companies taking the lead in shaping the policy and marketing conditions that enable success and reward climate leadership.

This report examines the zero-emission vehicle landscape through companies' publicly stated transportation goals. To achieve these goals, companies must align their industry engagement and policy alignment with those stated goals.

In 2021, EDF called on fleets to engage with policymakers to support the transition to zero-emission fleet standards, but responsible, good faith engagement can happen in many different ways. Leadership extends beyond direct engagement with policymakers and extends into work with trade associations, industry forums, supply chain relationships and procurement practices that increasingly shape policy outcomes and market signals.

Fleets play a critical role in shaping policies, programs, investments and industry norms that make clean transportation possible.

Pathways for Responsible Engagement

Engaging with policymakers is not the only way to prompt change. Fleets should explore the many different options available to them like:

- Engaging responsibly within trade associations
- Aligning public positions with stated sustainability commitments
- Signaling demand for zero-emission vehicles to manufacturers, utilities and suppliers
- Participating constructively in regulatory and policy processes
- Supporting peer learning to reduce uncertainty across the sector

The presence of sustainability commitment is strengthened when a company's external engagement aligns with its stated goals. Misalignment between public commitments and industry influence can undermine credibility, while constructive engagement can reduce risk, create conditions for success and accelerate progress. The sustainability commitments analyzed in this report present many different ways to achieve decarbonization of the transportation industry. Industry norms will shift as fleets establish more ambitious targets. Companies that align commitments with action help shape a competitive environment that rewards climate leadership, rather than risk falling behind peers who are setting the standard.

Implications

As fleets expand zero-emission commitments and transition plans, they operate within a shared policy and market environment. No single company can wait for others to shape those conditions. Durable progress depends on fleets collectively taking initiative to influence the policy and regulatory landscape in ways that make long-term decarbonization achievable at scale.

Leadership under this action is not about visibility alone. It is about helping to create durable market conditions that support investment, innovation and sustained emissions reductions.

We call on all fleets to:

1. **Engage proactively and constructively:** Every fleet is in a different place in their electrification journey, but all fleets have influence. Companies should identify opportunities to engage constructively in policy, regulatory and industry forms in ways that align with and enable their sustainability commitments.
2. **Engage with others:** Build coalitions that strengthen collective progress for policies that enable meeting commitments and delivering benefits to communities. Share successes, learnings and best practices with peers, suppliers and industry partners to reduce uncertainty. Together companies can help establish best practices and support conditions for zero-emission fleets at scale.
3. **Align influence with ambition:** Ensure that public policy positions, trade association engagement, procurement strategies and supplier relationships reinforce and enable stated climate and zero-emission goals.

Company Feature: IKEA

While not a fleet operator, IKEA has substantial freight demand and plays an influential role in shaping transportation practices through procurement and industry engagement. Ikea has developed a portfolio of decarbonization initiatives called Reduce, Replace and Rethink, which combine different pathways to achieve their 2030 climate goals.

Through these initiatives, IKEA pursues emissions reductions from several angles. Internally, the company uses strategies like reducing fuel and energy use and partnering with carriers to promote fuel-use reduction and alternative fuels. Externally, IKEA collaborates with transportation providers and participates in coalitions and pilot projects that test and scale cleaner freight technologies.

Although IKEA does not operate its own fleet, its approach demonstrates how companies can influence transportation practices across the value chain. By aligning internal sustainability efforts with external collaboration, companies like IKEA help signal demand for cleaner freight solutions and support development of industry practices that enable long-term decarbonization.[6]

6 IKEA. IKEA SCO Annual Catalogue. Inter IKEA Systems B.V., May 2025.

MOVING FORWARD TO A ZERO-EMISSION FUTURE

Since the Fleet Leadership Framework was introduced in 2021, fleets across the U.S. have demonstrated what is possible when ambition is paired with action; however, transitioning fleet operations to zero emissions by 2040 will require continued leadership, coordination and investment across the sector.

Analysis in this report shows that while meaningful progress has been made, companies will also play an important role in shaping the policy and marketing conditions that determine how quickly the transition can scale. When companies align strong commitments with constructive industry engagement, they not only reduce their own transition risks but also help establish norms and market signals that accelerate progress across the sector.

Achieving a zero-emission freight system by 2040 is within reach, but it will require sustained leadership across the sector. Fleets can strengthen progress toward a zero-emission freight system by:

- Setting clear zero-emission commitments with measurable milestones that signal long-term direction and accountability.
- Developing credible transition plans that align capital cycles, infrastructure investment and operational strategy with those commitments.
- Deploying zero-emission solutions today and sharing lessons learned to reduce uncertainty and accelerate industry adoption.
- Aligning industry engagement with sustainability goals, helping to shape the policy and market conditions that enable zero-emission freight to scale.

EDF's Zero-Emission Fleet Commitment list provides a cross-sectional review of how the largest fleets in the U.S. are approaching transportation sustainability and where momentum is building.

Scope

This report is based on the publicly stated transportation or emission reduction-related sustainability commitments of the top 100 fleet-owning companies in the United States in 2025. Data is based on statements and disclosures from summer 2025 or earlier and is based on relevant information and goals for transportation. Companies may have other sustainability commitments related to things like water, agriculture, waste, etc. that are not included in this report. Companies may also have internal sustainability commitments that are not listed here. Data and language have been paraphrased and distilled at EDF's discretion.

Methodology

The top 100 fleet-owning companies in the United States were identified using FleetOwner 500's list of top private and for hire fleets operating in the U.S in 2025. The top 50 private and for-hire fleets were combined to form EDF's top 100 fleets list. This report represents 2025 placements.

The top 100 fleets were researched and their transportation-related sustainability commitments were aggregated. These commitments came from public statements such as yearly environmental, social and governance/sustainability reports, CPD reporting, website statements or press releases, etc. Language was distilled and paraphrased at EDF's discretion.

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