

Construction

industry benchmark 2020-2022

Fleet trends in the European
construction industry
May 2023



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In this Construction industry benchmark report, we highlight the most important fleet trends in Europe by comparing passenger car registrations between 2020 and 2022.

We applied the following definition of the Construction industry: *Companies involved in developing physical buildings/infrastructure or being part of the building/infrastructure-development supply chain.*

This analysis of fleet trends is based on LeasePlan passenger car data from over 120 international companies. For the scope and to make sure the data is representative, we've only included countries where at least 100 passenger cars were renewed within the industry each year (2020, 2021 and 2022).

If you would like to know how sustainable this industry is compared to other industries, please check out our [Sustainable Industry Fleet Ranking 2022](#).

Key findings



The C1 segment remains the most popular segment in the Construction industry, however it is not as popular as previous years. The most popular model in 2022 was the Peugeot 3008.



As for powertrains, the switch from diesel to other powertrains continues, especially to battery electric vehicles (BEVs) (+10 p.p.*) and plug-in hybrids (PHEVs) (+6 p.p.).



There are large differences per country in the pace of moving away from diesel. The Netherlands and the UK had a diesel share of 4% in 2022 while in Germany the share was still 87%.



The average CO₂ emissions in the Construction industry decreased by 12.8 g/km. Going from 112.2 g/km in 2020 to 99.4 g/km in 2022. The United Kingdom is leading with the lowest average emissions at 28.9 CO₂ g/km.

For more information, please contact your LeasePlan liaison or LeasePlan Consulting at ics@leaseplan.com.

*p.p. is percentage points

SUVs are hugely popular, making up 39% of all cars in the top 10

Most driven car segments*, 2020-2022

	2020		2021		2022	
1	C1	26%	C1	21%	C1	22%
2	D2	12%	D2	11%	D2	11%
3	SUV-C1	10%	SUV-C1	10%	SUV-D1	11%
4	D1	10%	D1	9%	SUV-C1	10%
5	B1	9%	B1	9%	B1	10%
6	SUV-D1	6%	SUV-D1	8%	SUV-B1	8%
7	MPV-C	4%	SUV-B1	7%	D1	6%
8	SUV-D2	4%	SUV-C2	5%	SUV-C2	5%
9	SUV-B1	4%	SUV-D2	4%	SUV-D2	5%
10	SUV-C2	3%	MPV-C	4%	C2	3%

Most popular car segment in 2022:

C1
segment

Volkswagen Golf



The **C1 segment** remains the most popular car segment, but its share has declined from 26% in 2020 to 22% in 2022.

The **SUV trend continues** with 39% of cars in the top 10 being an SUV in 2022, compared to only 27% in 2020.

The **SUV-D1** has increased the most, from 6% in 2020 to 11% in 2022.

The **D1 segment** saw a large decrease from 10% in 2020 to 6% for 2022.

* For more information on car segments, please see [Appendix A](#)

The Peugeot 3008 is the most popular car for the second year

Most driven car models, 2020-2022

	2020	2021	2022
1	Peugeot 308	Peugeot 3008	Peugeot 3008
2	Skoda Octavia	Renault Megane	Skoda Octavia
3	Peugeot 3008	Renault Clio	Seat Leon
4	Volkswagen Passat	Skoda Octavia	Cupra Born
5	Renault Clio	Volkswagen Passat	Ford Focus
6	Ford Focus	Ford Focus	Renault Captur
7	Volvo V60	Volvo V60	Peugeot 308
8	Skoda Scala	Renault Captur	Peugeot 2008
9	Skoda Fabia	Peugeot 2008	Volkswagen Tiguan
10	Renault Megane	Citroen C4 Spacetourer	Volkswagen Passat

Most popular car in 2022:

Peugeot
3008



The **Seat Leon** increased significantly in popularity, coming in 3rd place in 2022 while not being in the top 10 in 2020 and 2021.

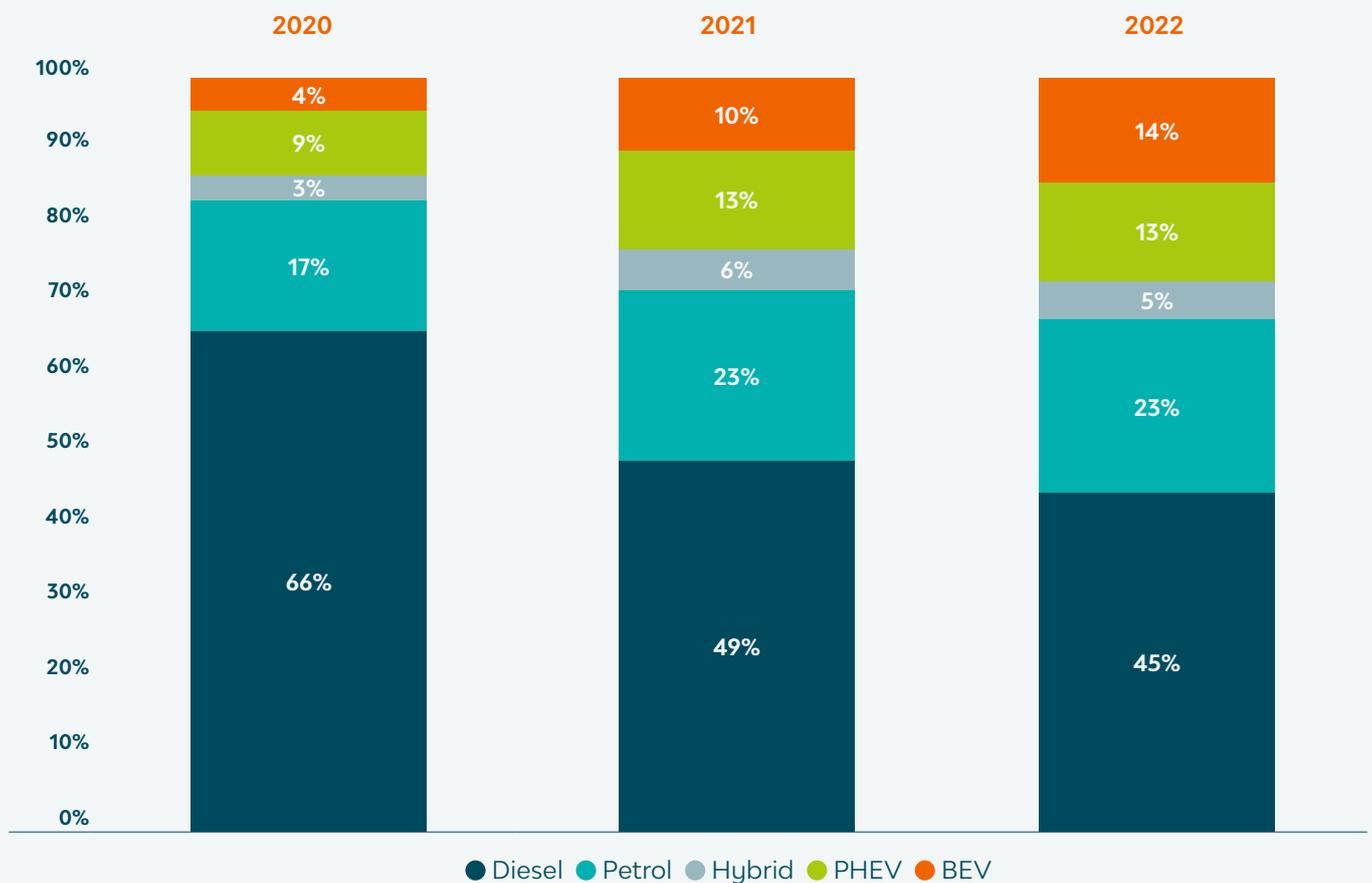
The **Peugeot 308** has dropped the most in popularity, from 1st place in 2020 to 7th place in 2022.

The **Volkswagen Group** is well represented in the top 10 with 5 car models.

The share of diesel cars has declined by 21 percentage points since 2020

Trends in powertrains, 2020-2022

fuel type breakdown 2020-2022



The share of battery electric vehicles (BEVs) has increased significantly by **+10 p.p.***

The share of plug-in hybrids (PHEVs) has also increased by **+4 p.p.***

The share of petrol has increased by **+6 p.p.***

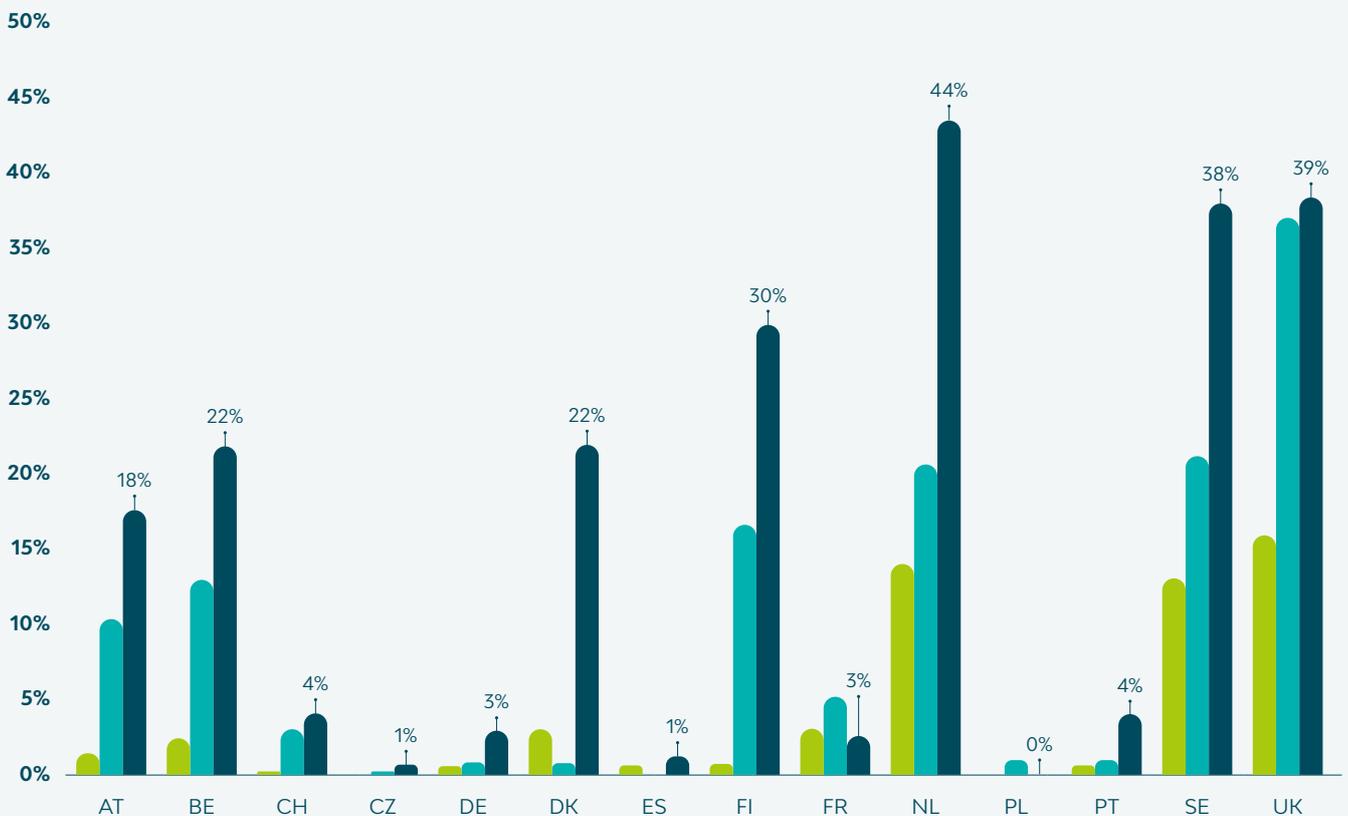
The hybrid share has increased by **+2 p.p.***

*P.P = Percentage Points

Northern Europe saw a significant increase of BEVs in the past 2 years

Share of BEV per country*, 2020-2022

● 2020 ● 2021 ● 2022



The Netherlands has the highest share of battery electric vehicles (BEVs) with a share of 44% in 2022.

The UK and Sweden are a close second and third with 39% and 38% BEV share respectively.

Most countries have seen an increase in BEVs over the past year.

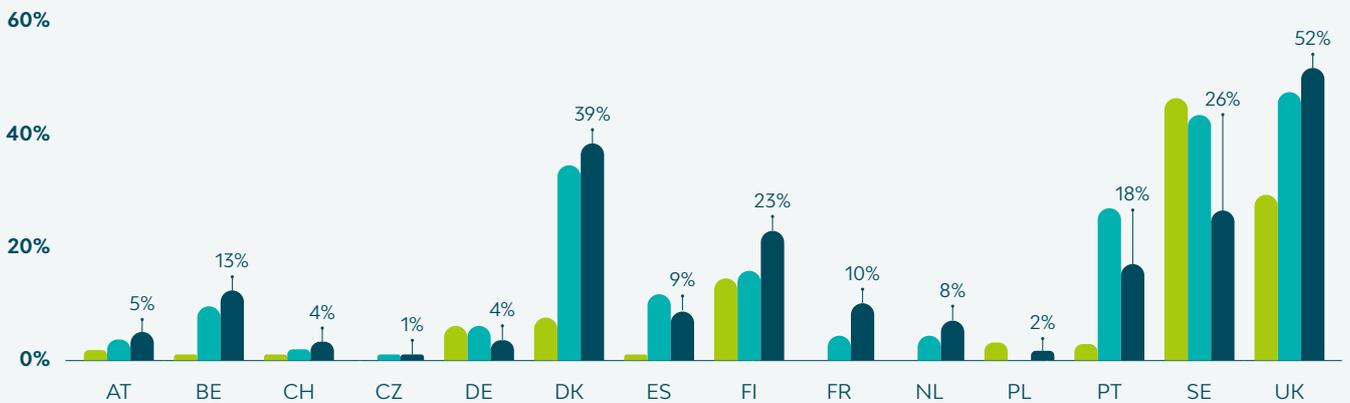
Finland has seen the largest increase in battery electric vehicles, going from 1% in 2020 to 30% in 2022.

*Only countries with at least 100 renewals each year are shown here to ensure representative statistics

Most countries saw an increase in PHEV share over the past two years

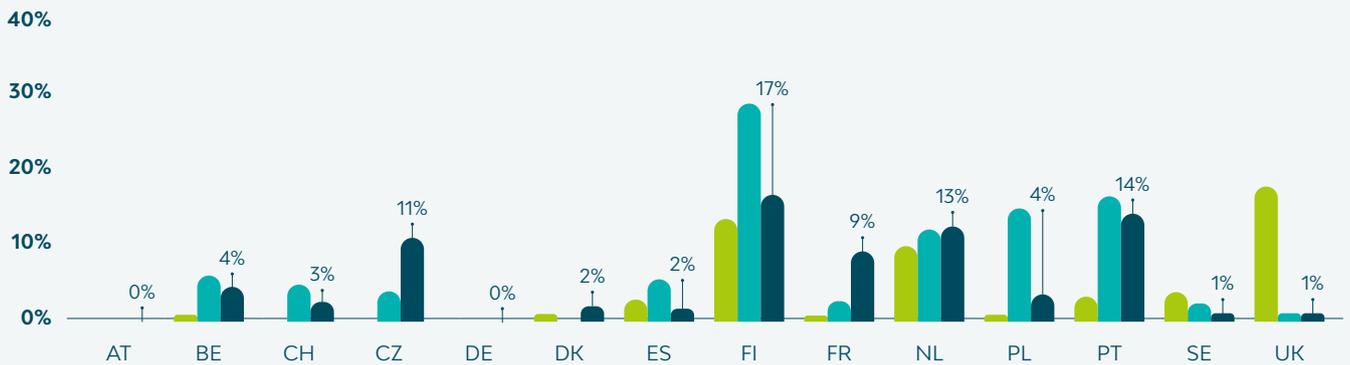
Share of PHEV per country*, 2020-2022

● 2020 ● 2021 ● 2022



Share of hybrid per country*, 2020-2022

● 2020 ● 2021 ● 2022



Denmark has seen the largest increase in PHEVs over the last three years, moving from 8% in 2020 to 39% in 2022.

Finland has the largest share of hybrids with 17% but it decreased significantly from 2021 when it was 29%.

Sweden saw a sharp decline in PHEV share, from 47% in 2020 to 26% in 2022.

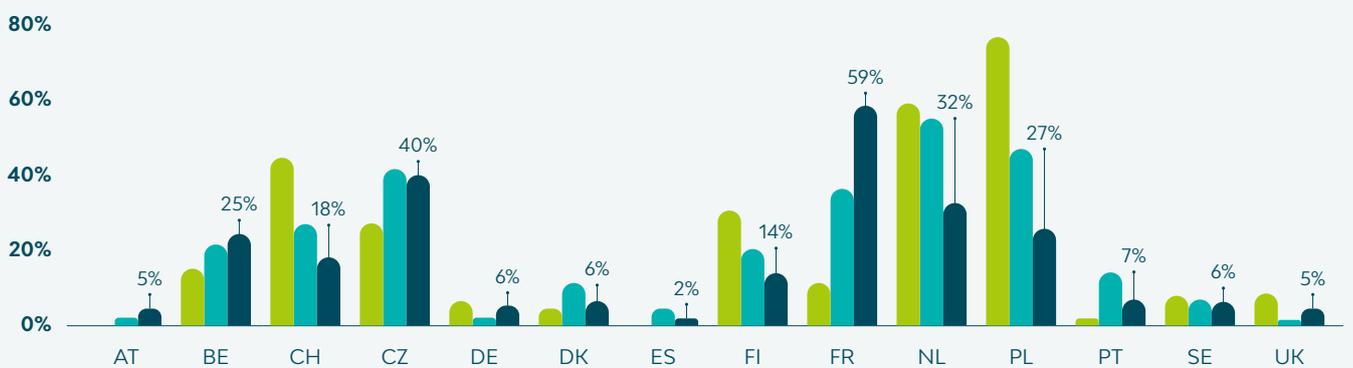
The UK has the highest share of PHEVs at 52%.

*Only countries with at least 100 renewals each year are shown here to ensure representative statistics

Since 2020, only Germany, Poland and Switzerland have shown increases in the share of diesel in fleet

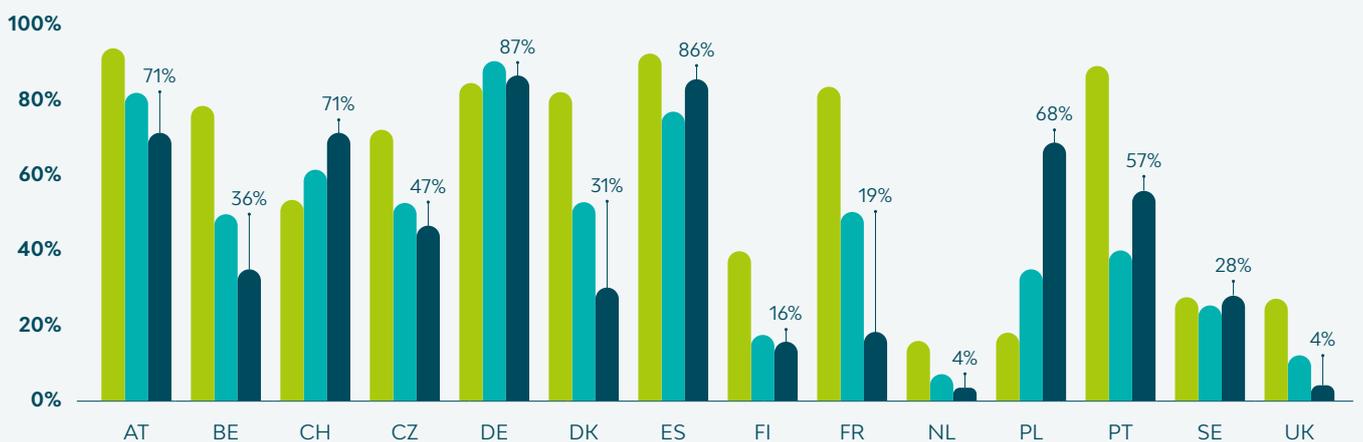
Share of petrol per country* 2020-2022

● 2020 ● 2021 ● 2022



Share of diesel per country*, 2020-2022

● 2020 ● 2021 ● 2022



France has the largest share of petrol of 59% in 2022.

The Netherlands and the UK have the lowest share of diesel vehicles at 4% in 2022.

The long term trend shows countries moving away from diesel, but there was a stabilisation and increase for a few countries between 2021-2022.

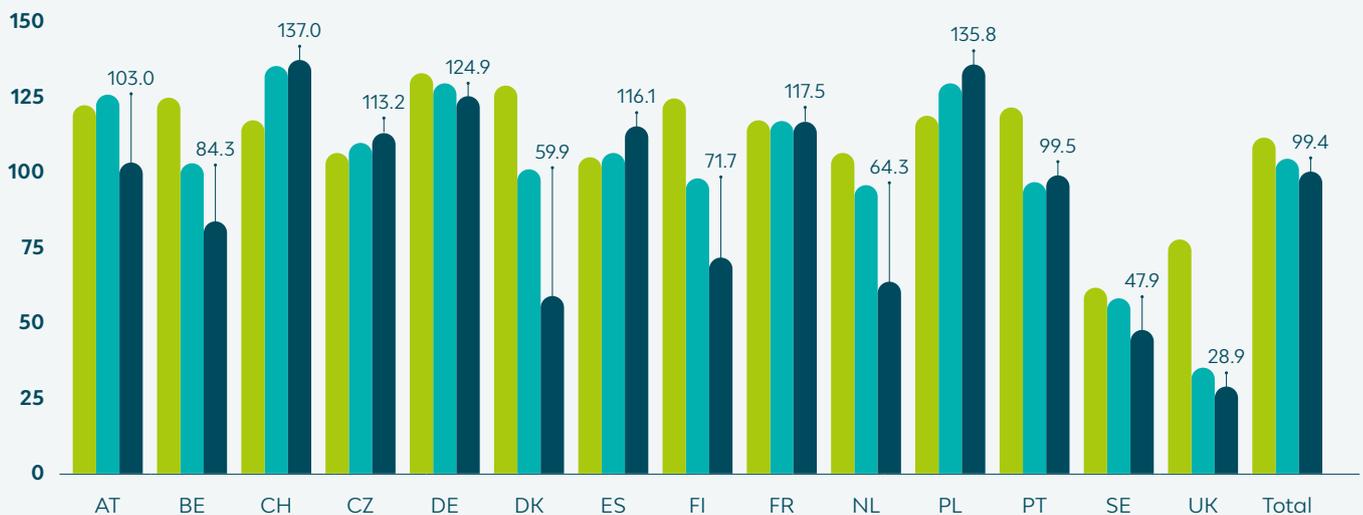
Germany has the highest share of diesel in 2022: 87%.

*Only countries with at least 100 renewals each year are shown here to ensure representative statistics

The Construction industry was able to lower average fleet CO₂ emissions* by 12.8 g/km to 99.4 g/km over two years

CO₂ average per country**, 2020-2022

● 2020 ● 2021 ● 2022



The United Kingdom has the lowest average CO₂ emissions (28.9 g/km).

Switzerland has the highest average CO₂ emissions (137.0 g/km).

The downward CO₂ emissions trend can be seen in all countries, apart from **the Czech Republic, Spain, Poland and Switzerland**.

*Based on the car manufacturers (OEM) reported CO₂

**Only countries with at least 100 renewals each year are shown here to ensure representative statistics

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LeasePlan Corporation N.V.

Gustav Mahlerlaan 360
1082 ME Amsterdam
The Netherlands
info@leaseplancorp.com
leaseplan.com



What's next?

Appendix A: Segmentation – Overview

The letter indicates the dimensions of the vehicle; **C** being smaller than **E**.
The number indicates the quality level of a brand; **1** being a ‘**volume brand**’ and **2** being ‘**premium brand**’.

	Volume cars (1)			Premium cars (2)		LCVs
	Hatchback / sedan / SW	SUV	MPV	Hatchback / sedan / SW	SUV	
Subcompact cars (B)	 B1 – VW Polo	 SUV-B1 – VW T-Cross	Not common	 B2 – Mini Cooper	Not common	 Small – VW Caddy
Compact cars (C)	 C1 – VW Golf	 SUV-C1 – VW T-Roc	 MPV-C – VW Touran	 C2 – BMW 1 series	 SUV-C2 – BMW X1	 Medium – VW Transporter
Midsized cars (D)	 D1 – VW Passat	 SUV-D1 – VW Tiguan	 MPV-D – VW Sharan	 D2 – BMW 3 series	 SUV-D2 – BMW X3	 Large – VW Crafter
Full-size cars (E)				 E2 – BMW 5 series	 SUV-E2 – BMW X5	 Pickup

