



Consumer Goods

# industry benchmark 2020-2022

Fleet trends in the  
consumer goods industry  
**May 2023**



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In this Consumer Goods industry benchmark report, the most important fleet trends in Europe are highlighted, by comparing the passenger car registrations between 2020 and 2022.

The following definition of the Consumer Goods industry has been applied: *Companies developing or selling consumer products (FMCGs, retailers, etc).*

This analysis of fleet trends is based on LeasePlan passenger car data from over 200 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 compared to other industries please check out our [Sustainable Industry Fleet Ranking 2022](#).

## Key findings



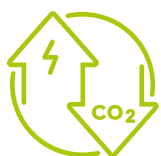
The C1 segment is still the most popular segment in the Consumer Goods industry. However, a D1 vehicle, the Volkswagen Passat, has retaken the position as most popular car model in 2022.



As for fuel types, the switch from diesel to other fuel types is clear with a decrease of 32 p.p.\* from 2020 to 2022. The share of hybrid has increased the most with an increase of 13 p.p.



There are big differences per country when it comes to the share of diesel cars in fleet. In the Netherlands only 3% of vehicles were registered as diesel, while this is still +70% in Germany, Spain and the Czech Republic.



Between 2020 and 2022, average CO<sub>2</sub> emissions decreased by 14.6 g/km to 102.2 g/km. Sweden is leading this trend with average CO<sub>2</sub> emissions of 36.6 g/km.

For more information, please contact your LeasePlan liaison or LeasePlan Consulting at [ics@leaseplan.com](mailto:ics@leaseplan.com).

\*p.p. is percentage points

# The C1 segment remains the most popular car segment

## Most driven car segments\*, 2020-2022

	2020		2021		2022	
1	C1	26%	C1	22%	C1	25%
2	D1	14%	D1	14%	SUV-D1	13%
3	SUV-C1	10%	SUV-D1	13%	D1	12%
4	SUV-D1	9%	D2	11%	SUV-C1	10%
5	D2	9%	SUV-C1	9%	D2	9%
6	MPV-C	5%	SUV-C2	6%	B1	7%
7	SUV-D2	5%	SUV-D2	5%	SUV-C2	5%
8	SUV-C2	5%	E2	4%	SUV-D2	4%
9	B1	5%	SUV-B1	4%	E2	3%
10	SUV-B1	4%	MPV-C	3%	SUV-B1	3%

## Most popular car segment in 2022:

C1  
segment



**The SUV-trend continues** but seemed to have stabilised as the combined share in the top ten in 2020 was 29%, in 2021 37% and 35% in 2022.

The largest gaining car segment is the **SUV-D1 segment**, going from 9% in 2020 to 13% in 2022.

The **MPV-C segment has seen the largest decrease** in share going from 6th place in 2020 with a share of 5% to 2% in 2022 and outside the top 10.

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

# The Volkswagen Passat has retaken the top spot as the most popular car

## Most driven cars\*, 2020-2022

	2020	2021	2022
1	Volkswagen Passat	Toyota Corolla	Volkswagen Passat
2	Peugeot 308	Skoda Octavia	BMW 3 Series
3	Skoda Octavia	BMW 3 Series	Ford Kuga
4	Toyota Corolla	Ford Mondeo	Toyota YARIS
5	Ford Focus	Skoda Suberb	Peugeot 3008
6	Volkswagen Tiguan	Peugeot 3008	Toyota C-HR
7	Peugeot 3008	Volkswagen Passat	Skoda Suberb
8	Skoda Suberb	Ford Kuga	Ford Mondeo
9	BMW 3 Series	Peugeot 2008	BMW 5 Series
10	Volkswagen Golf	Ford Focus	Ford Focus

## Most popular car in 2022:

Volkswagen  
Passat



The **BMW 3 series** has now become the second most popular car model, moving up from 9th place in 2020.

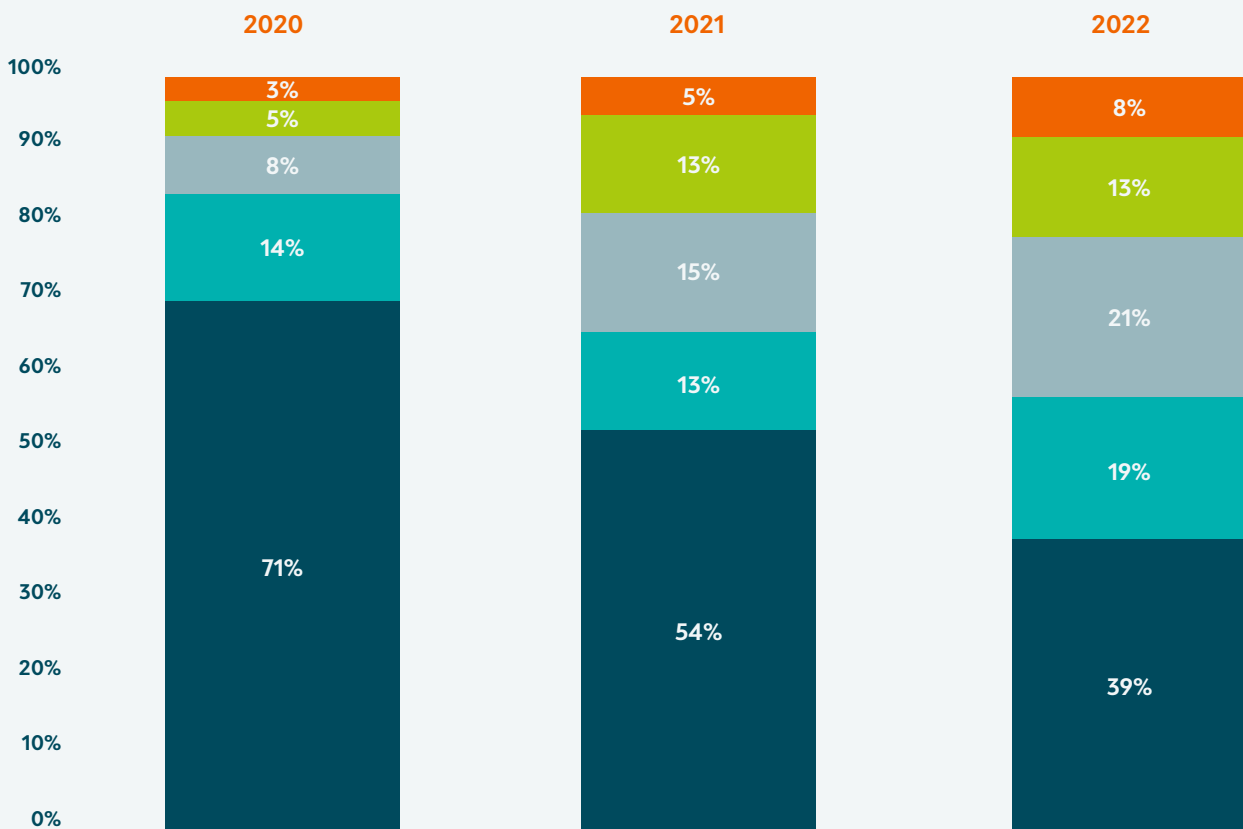
The **Peugeot 308** has dropped significantly in popularity, moving from second place in 2020 to outside the top 10 in 2022.

**Ford** has seen an increase in popularity with three cars in the top 10 in 2022 compared to just 1 in 2020.

The share of diesel in fleet has declined sharply since 2020, from 71% share to 39%

### Trends in fuel types, 2020-2022

● Diesel ● Petrol ● Hybrid ● PHEV ● BEV



While diesel has declined since 2020, the share of petrol has increased by **5 p.p.\***

The hybrid share has increased by **13 p.p. since 2020**, now a more popular fuel type than petrol.

The PHEV has increased **8 p.p.** but stabilised compared to 2021.

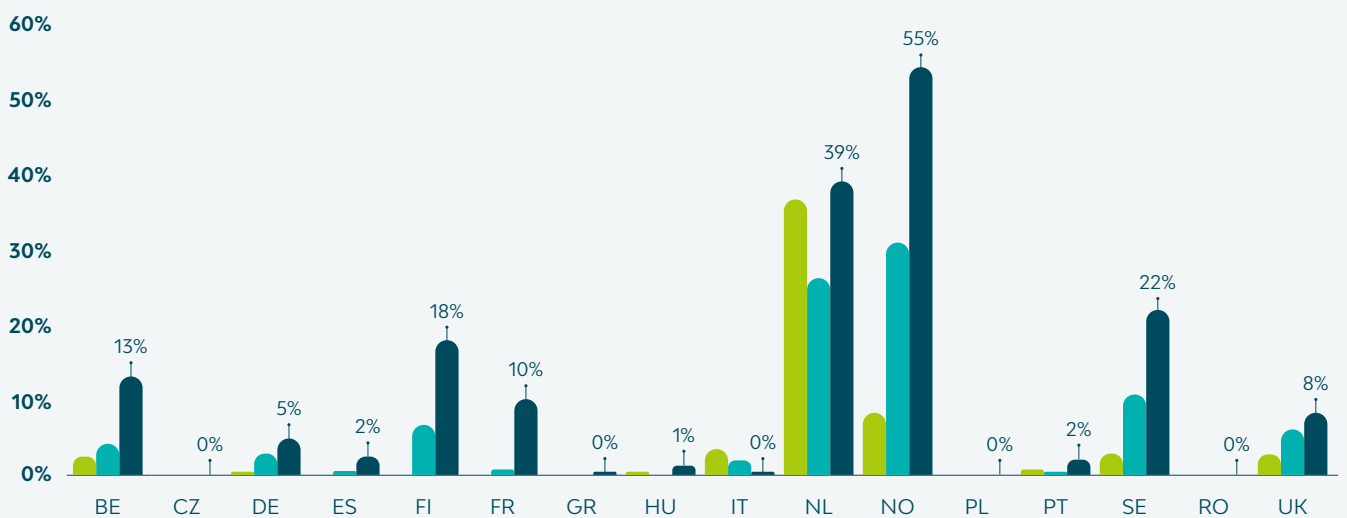
The share of BEV has increased by **5 p.p. since 2020**.

\*P.P = Percentage Points

Norway has seen huge increases in the share of battery electric vehicles in fleet, going from less than 10% share in 2020 to 55% in 2022

### Share of BEV per country\*, 2020-2022

● 2020 ● 2021 ● 2022



The share of BEVs in **The Netherlands** decreased in 2021 but increased again in 2022 to 39% fleet share, slightly higher than 2020.

**France** is showing a promising trend, increasing its BEV share by 10 p.p. in 2022.

**Finland, Norway** and **Sweden** have seen significant increases in the share of BEVs over the past two years.

\*Only countries are shown here with at least 100 renewals each year to ensure a representative sample size

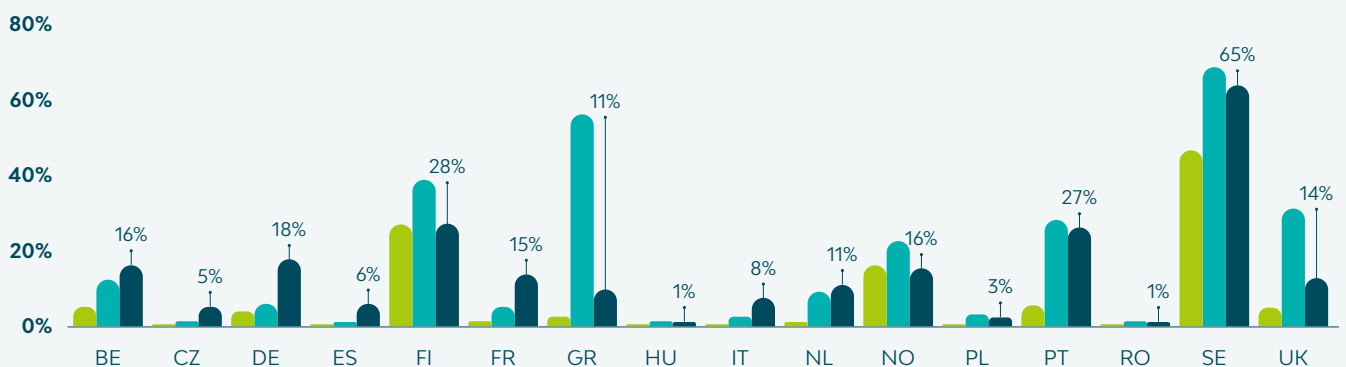
\*\*See the LeasePlan EV Readiness Index 2022



The share of plug-in hybrid vehicles in fleet has declined over the past year in most countries

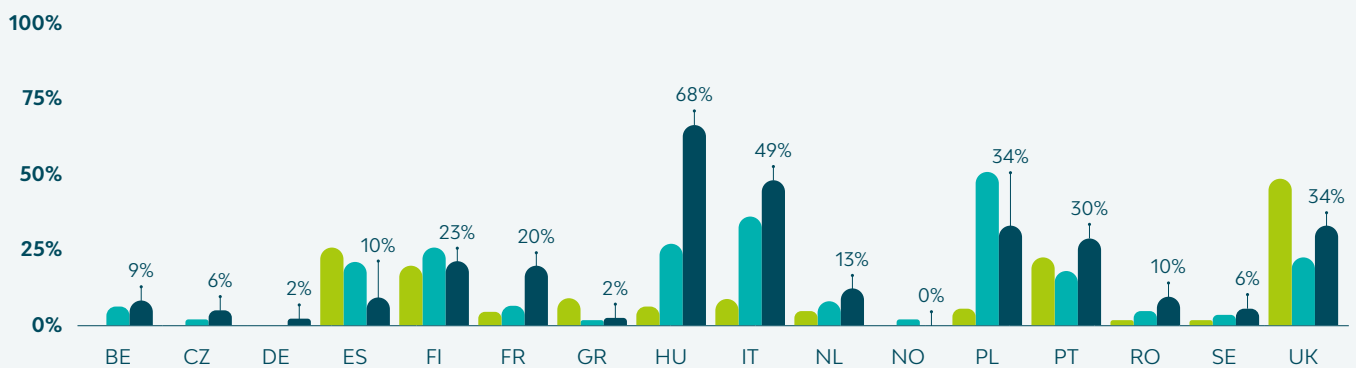
Share of PHEV per country\*, 2020-2022

● 2020 ● 2021 ● 2022



Share of hybrid per country\*, 2020-2022

● 2020 ● 2021 ● 2022



**Sweden** has the largest PHEV share with 65% in 2022, however it declined compared to 2021.

**Italy** has the second-largest hybrid share with 49%.

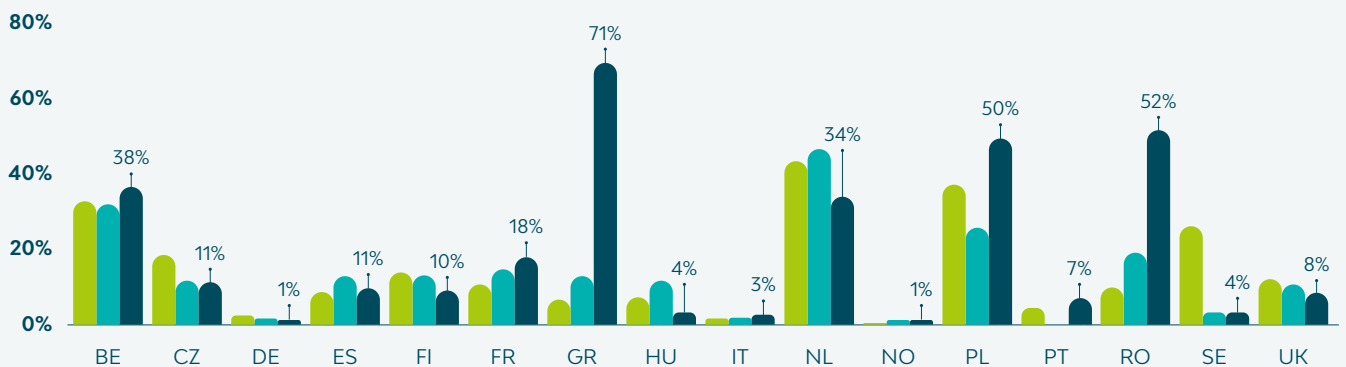
**Hungary**, has the highest share of hybrids in fleet at 68%.

\*Only countries are shown here with at least 100 renewals each year to ensure a representative sample size

# The shift away from diesel is seen in every country except for Spain

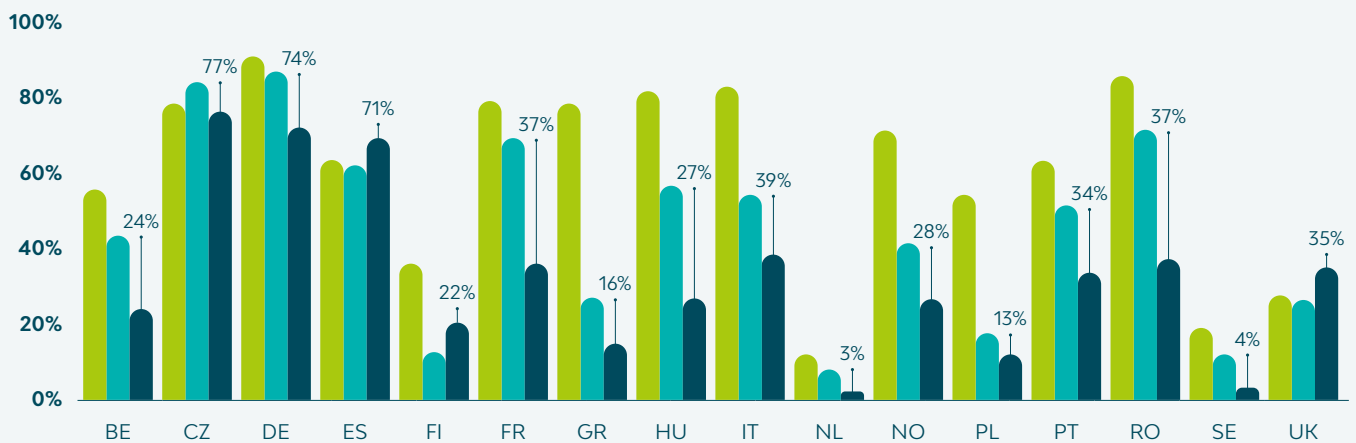
Share of petrol per country\* 2020-2022

● 2020 ● 2021 ● 2022



Share of diesel per country\*, 2020-2022

● 2020 ● 2021 ● 2022



**Greece** has the largest share of petrol, 71% in 2022.

**The Netherlands** has the lowest share of diesel with only 3% in 2022.

**Greece** has the largest share of petrol cars in fleet and has had the largest increase in petrol cars over the past year.

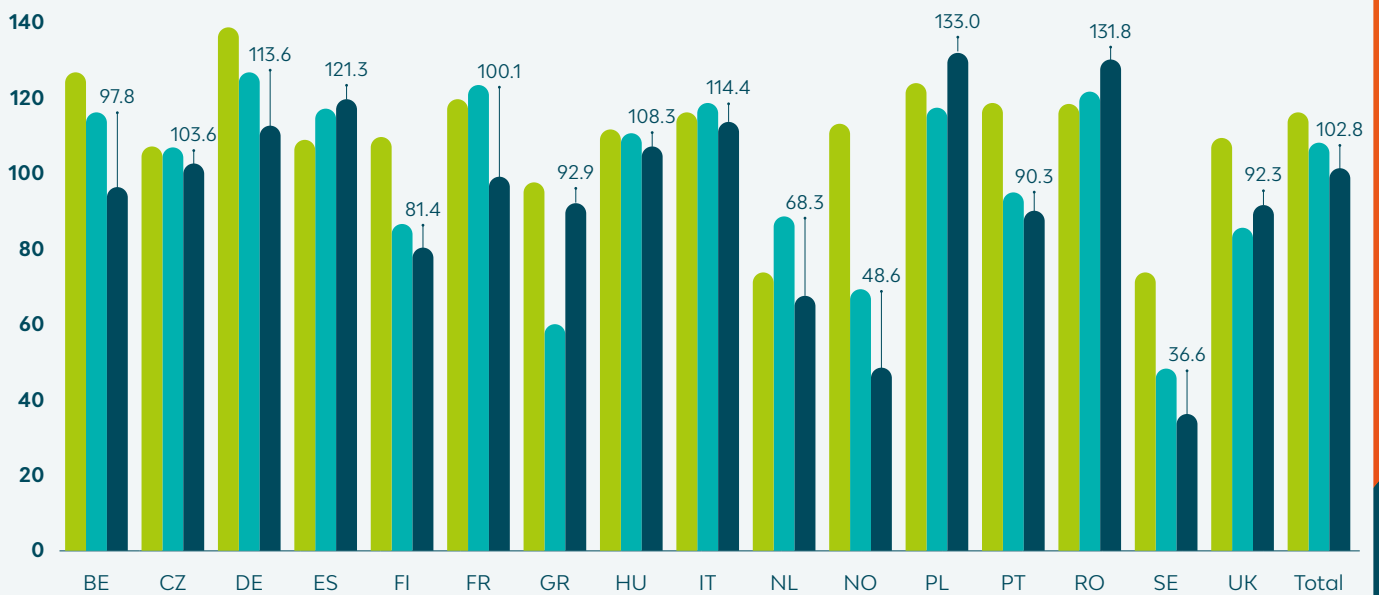
**Greece** has seen the largest drop in diesel, moving from 80% in 2020 to 16% in 2022.

\*Only countries are shown here with at least 100 renewals each year to ensure a representative sample size

# In 2022 average CO<sub>2</sub> emissions in the Consumer Goods were 102.8 g/km

## CO<sub>2</sub> average per country\*\*, 2020-2022

● 2020 ● 2021 ● 2022



The average CO<sub>2</sub> emissions in grams per km has decreased by **14.6 g/km since 2020 to 102.8 g/km.**

**At 36.6 g/km, Sweden** has the lowest average CO<sub>2</sub> emissions.

**Poland** has the highest average CO<sub>2</sub> emissions at 133.0 g/km.

**Only Poland, Spain and Romania** saw an increase in CO<sub>2</sub> emissions average, while all other countries saw a decrease.

\*Based on the car manufacturer (OEM) reported CO<sub>2</sub>

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

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**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

