



Healthcare & Pharma

# industry benchmark 2020-2022

Fleet trends in the European  
healthcare & pharma

**May 2023**



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

We applied the following definition of the Healthcare & Pharma industry: *Companies developing, selling or buying healthcare products (including pharmaceutical drugs).*

This analysis of fleet trends is based on LeasePlan passenger car data from 166 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 SUV-C2 segment has become the most popular segment in the Healthcare & Pharma industry. This is also reflected by in the most popular car models where the BMW X1 and Audi Q3 (both SUV-C2 models) have taken the top two spots.



As for powertrains, the switch from diesel to low emitting powertrains continues, with a decrease of 22 p.p.\* since 2020. The share of BEV and PHEV have both benefitted from the decline in diesel with a 9 p.p. increase.



However, there are large differences per country when it comes to the share of diesel cars in fleet. While in the Netherlands, only 6% of vehicles were registered as diesel, this was still 79% in the Czech Republic.



Overall, the Healthcare and Pharmaceutical industry was able to lower average CO<sub>2</sub> emissions to 102.2 g/km. The UK is leading with an average CO<sub>2</sub> emission of only 45.6 g/km.

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\*p.p. is percentage points

The SUV-C2 has become the most popular segment, from 7% in 2020 to 14% in 2022

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

	2020		2021		2022	
1	C1	20%	C1	14%	SUV-C2	14%
2	D2	16%	SUV-C2	13%	D2	14%
3	D1	14%	D2	13%	SUV-D1	12%
4	SUV-C1	9%	SUV-D1	11%	SUV-D2	11%
5	SUV-D1	9%	SUV-D2	10%	SUV-C1	10%
6	SUV-C2	7%	SUV-C1	8%	C1	9%
7	SUV-D2	6%	D1	8%	D1	8%
8	E2	5%	C2	6%	C2	5%
9	C2	4%	E2	5%	E2	5%
10	MPV-C	4%	MPV-C	3%	SUV-B1	3%

Most popular car segment in 2022:

SUV-C2  
segment



**The SUV trend continues** with a significant increase in its share in the top 10, from 31% in 2020 to 50% in 2022.

The **C1 segment** has dropped the most in popularity, from 20% in 2020 to 9% in 2022.

The premium segments (which can be recognized by a '2') have increased in share significantly, from 39% in 2020 to 49% in 2022.

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

The BMW X1 has become the most popular car model, moving from 10th place in 2020 to 1st place in 2022

### Most driven car models, 2020-2022

	2020	2021	2022
1	Volkswagen Passat	Toyota Corolla	BMW X1
2	Volkswagen Golf	BMW X1	Audi Q3
3	Toyota Corolla	Volkswagen Passat	Volkswagen Tiguan
4	BMW 3 Series	BMW 3 Series	Toyota Corolla
5	Peugeot 3008	Peugeot 3008	Volkswagen Passat
6	Audi A4	Audi A4	Mercedes-Benz CLA-Class
7	Ford Focus	Mercedes-Benz GLC-Class	Audi A4
8	Volkswagen T-Roc	BMW 5 Series	Volvo XC40
9	Volkswagen Tiguan	Volkswagen Tiguan	Skoda Octavia
10	BMW X1	Audi Q3	BMW X3

Most popular car in 2021:

BMW X1



The **Audi Q3** has taken the second place while in 2020, it wasn't in the top 10.

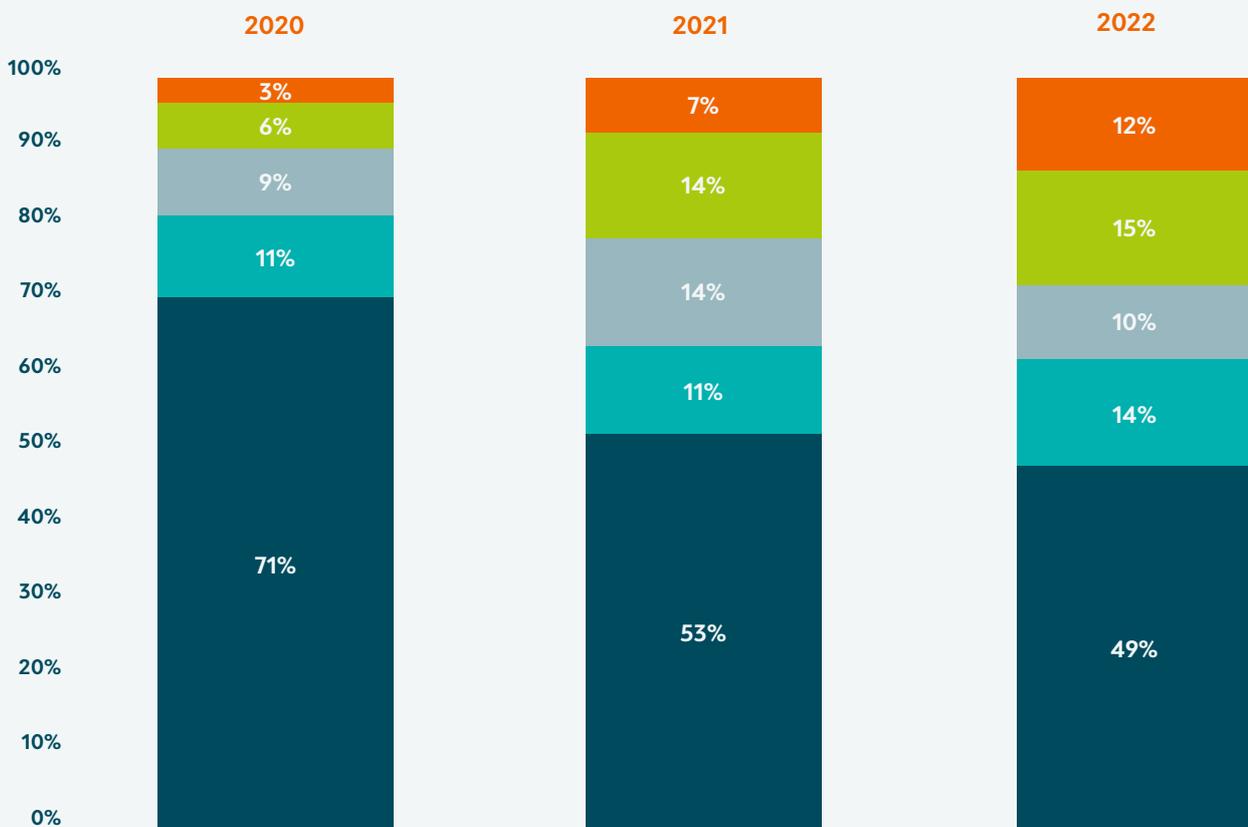
**Volkswagen** has declined in popularity, going from 4 car models in the top 10 in 2020 to only 2 car models in 2022.

6 out of the 10 models in the top 10 are SUVs.

# The share of diesel in fleet has declined by 22 percentage points since 2020

## Trends in powertrains, 2020-2022

● Diesel ● Petrol ● Hybrid ● PHEV ● BEV



Battery electric vehicle (BEV) and PHEV share have benefitted the most of diesel's decline, both by **9 p.p.\***

Petrol has increased slightly to **14%** market share, an increase of 3 p.p. since 2020.

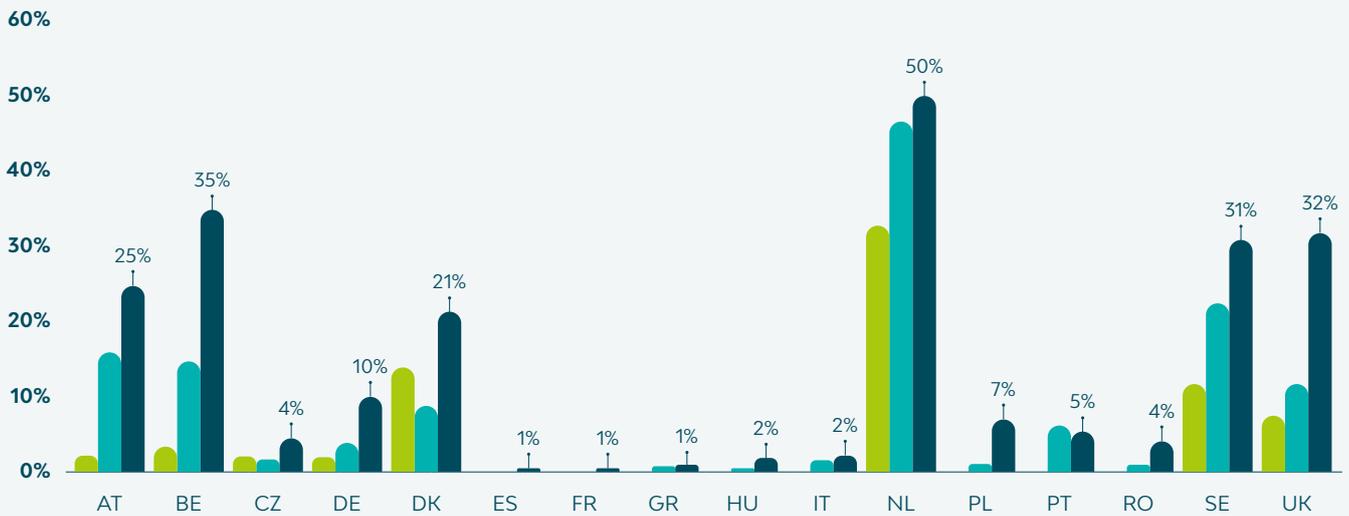
The hybrid share has stayed relatively stable at **10.0%**, an increase of 1 p.p.\* since 2020.

\*P.P = Percentage Points

Overall, Northern European countries have increased their BEV share significantly over the past two years

Share of BEV per country\*, 2020-2022

● 2020 ● 2021 ● 2022



**Belgium** comes in second place with a BEV share of 35% in 2022.

The Netherlands leads the way when it comes to battery electric vehicles, with 50% of cars in 2022 being fully electric.

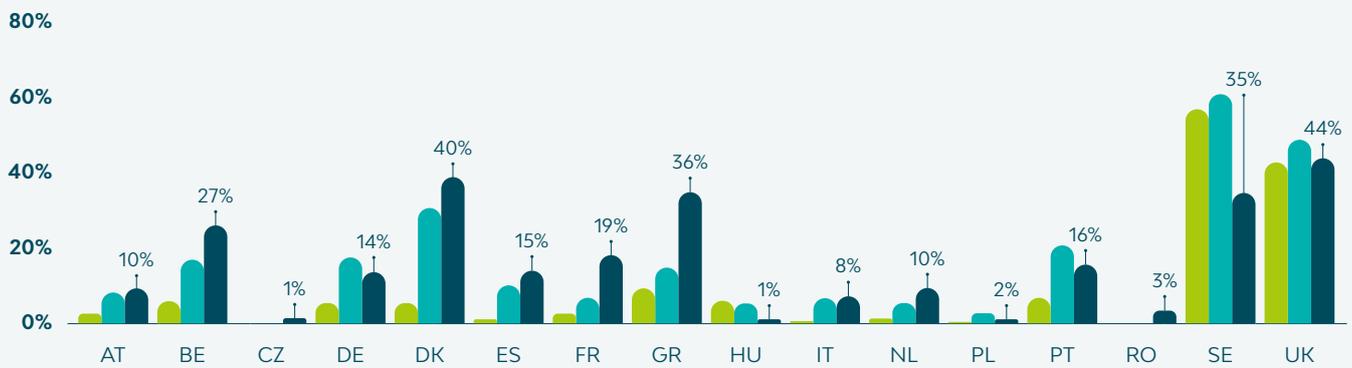
Eastern European countries have just started with the BEV adoption but show a promising trend in the last 12 months.

\*Only countries with at least 100 renewals each year are shown here to ensure representative statistics  
 \*\*See the LeasePlan EV Readiness Index 2022

# Hybrids are the most popular in Eastern European countries

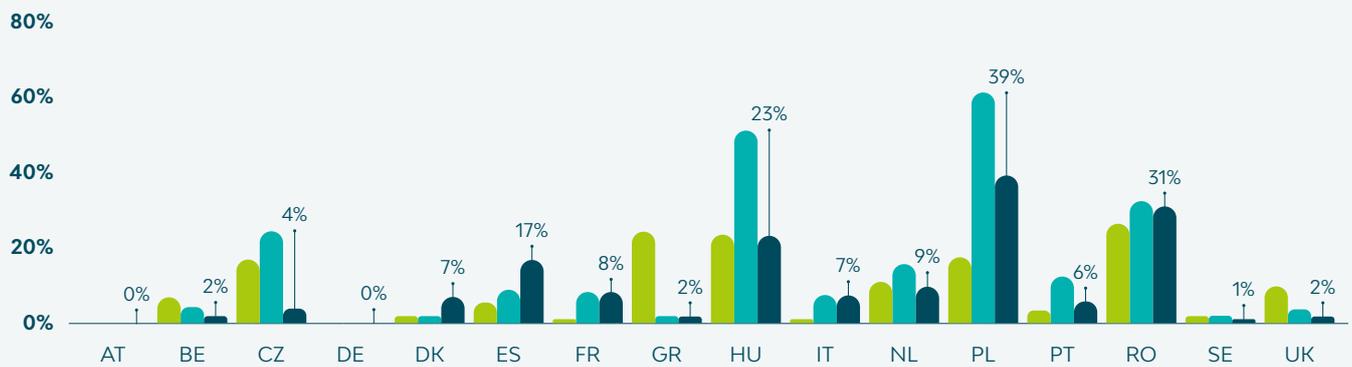
Share of PHEV per country\*, 2020-2022

● 2020 ● 2021 ● 2022



Share of hybrid per country\*, 2020-2022

● 2020 ● 2021 ● 2022



The share of PHEV is the largest in **the UK** with 44%, followed by **Denmark** with 40%.

**Poland** has the largest share of hybrids at 39% followed by **Romania** at 31%.

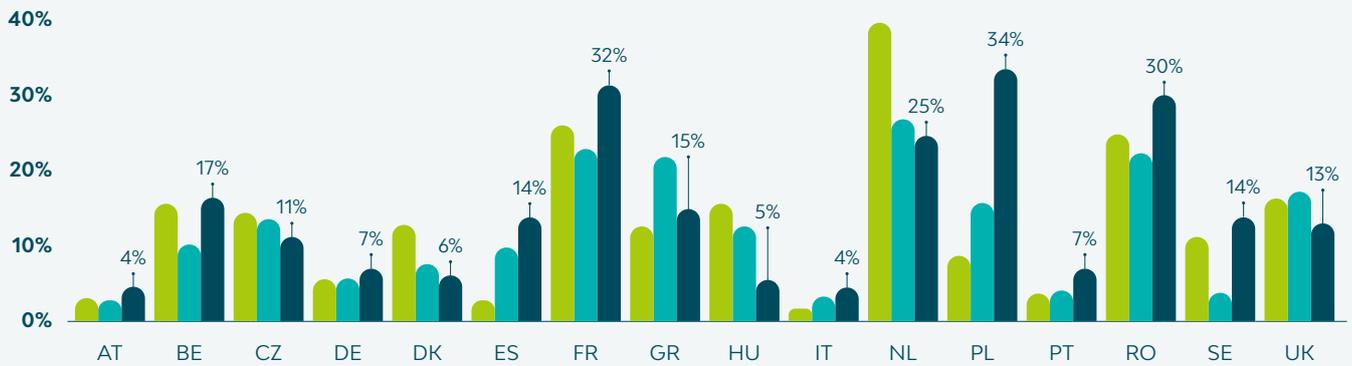
**Sweden** used to have the largest PHEV share, but it declined significantly in 2022.

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

Since 2020, most countries show a decline in diesel except the Czech Republic, Sweden and Hungary

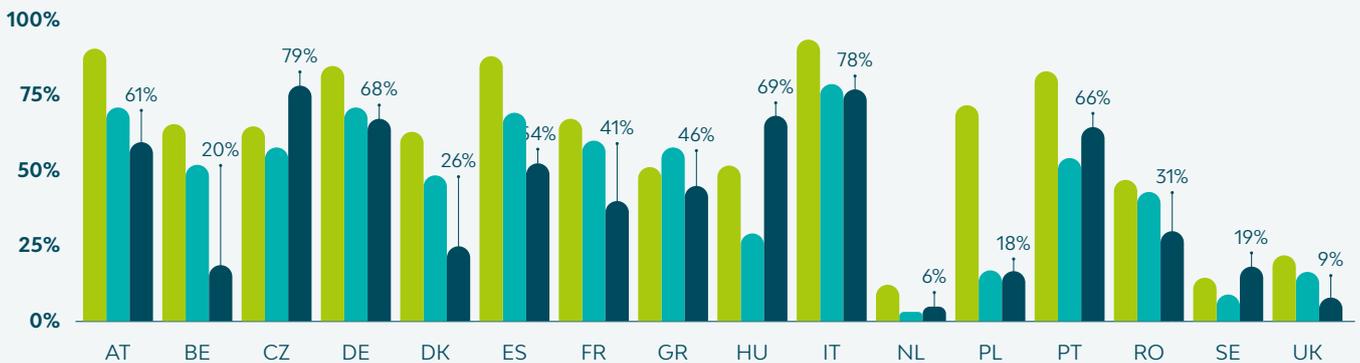
Share of petrol per country\* 2020-2022

● 2020 ● 2021 ● 2022



Share of diesel per country\*, 2020-2022

● 2020 ● 2021 ● 2022



**Poland** has the largest share of petrol with 34% in 2022.

**Italy** and **Czech Republic** have the largest share of diesel at 78% in 2022.

**The Netherlands** has the lowest share of diesel with 6% in 2022.

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

While most countries were able to lower their CO<sub>2</sub> emissions\* since 2020, Spain, Italy, Poland, Romania and Sweden saw a slight increase

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

● 2020 ● 2021 ● 2022



The average CO<sub>2</sub> emissions in the Pharma & Healthcare industry has dropped by 15.4 g/km to **102.2 g/km**.

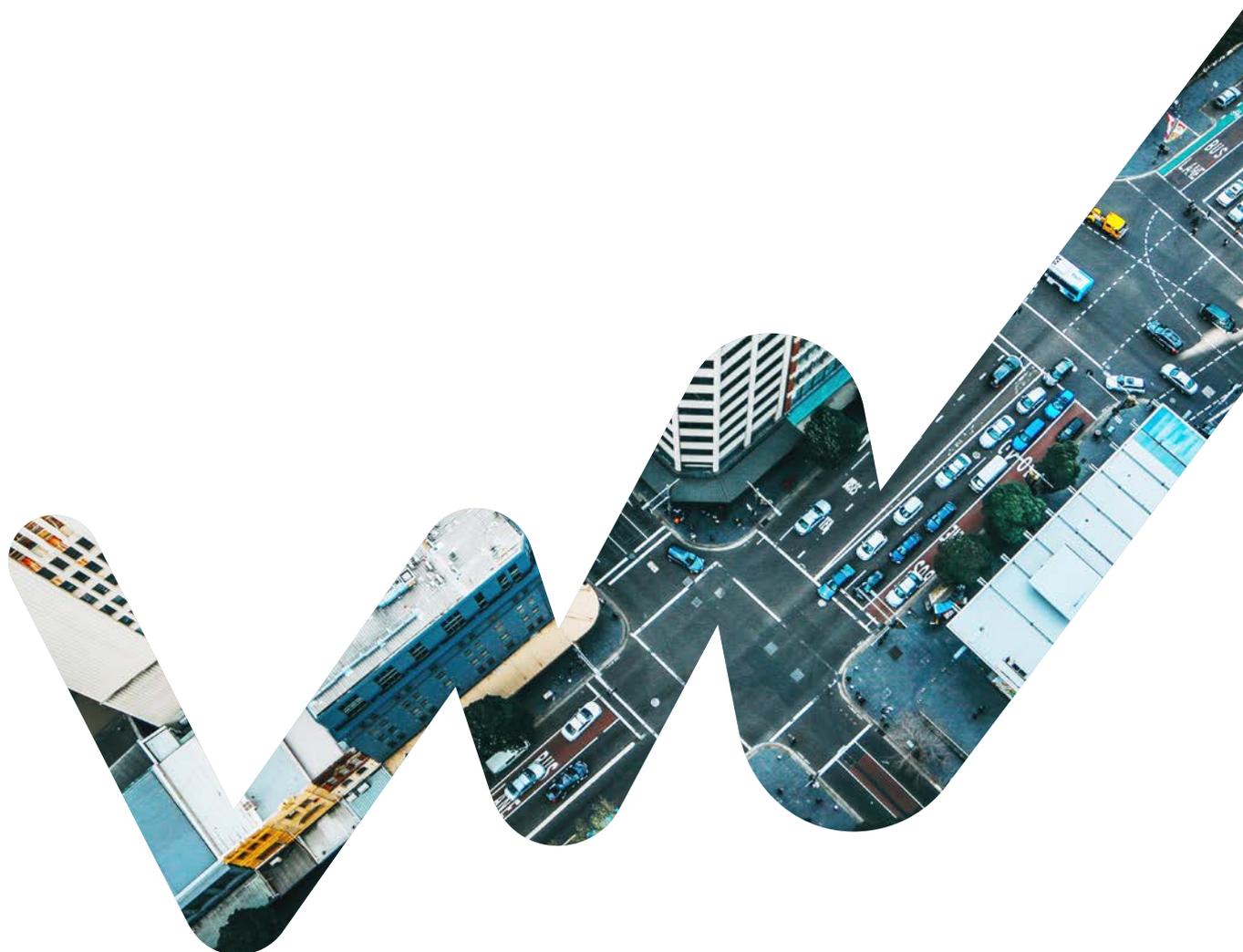
**Italy** has the highest average CO<sub>2</sub> emissions 127.5 g/km

**The UK** has the lowest average CO<sub>2</sub> emissions at 45.6 g/km.

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

\*\*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](mailto:info@leaseplancorp.com)  
[leaseplan.com](http://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