

Technology

# industry benchmark 2020-2022

Fleet trends in the European  
technology industry  
**May 2023**

# Contents

Introduction	3
Key insights	4
Most driven car segments, 2020-2022	5
Most driven car models, 2020-2022	6
Trends in powertrains, 2020-2022	7
Powertrain trends per country, 2020-2022	8
CO <sub>2</sub> averages per country, 2020-2022	11
Conclusion	12
Appendix A: overview of car segments	13





In this Technology 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 Technology industry: *Companies primarily involved in the development of hardware or software products.*

This analysis of fleet trends is based on LeasePlan passenger car data from over 180 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 D2 segment remains the most popular car segment for the third year in a row in the Technology industry, but the SUV-D2 is a close second. The most popular car model is the Volkswagen Golf.



The switch from diesel to other fuel types is clear, with a decrease of 23 p.p.\* between 2020 and 2022. Battery electric vehicles (BEVs) increased significantly, with 1 in 5 cars a BEV, now more popular than petrol.



However, there are large differences per country in the pace of moving away from diesel. While in the Netherlands 3% of vehicles were registered as diesel, this was still 67% in Austria.



Overall, the Technology industry was able to drastically lower their average CO<sub>2</sub> emissions by 27.0 g/km to 83.0 g/km in 2022. This trend was led by Sweden and the UK, with an average CO<sub>2</sub> emissions of about 27 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 D2 segment is the most popular car segment for the third year in a row

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

	2020		2021		2022	
1	D2	19%	D2	17%	D2	17%
2	SUV-D2	11%	SUV-D2	12%	SUV-D2	16%
3	C1	11%	C1	11%	C1	11%
4	D1	9%	SUV-D1	10%	SUV-D1	10%
5	SUV-D1	8%	SUV-C2	9%	SUV-C2	10%
6	SUV-C2	8%	D1	9%	D1	7%
7	E2	8%	E2	8%	E2	7%
8	SUV-C1	7%	SUV-C1	7%	SUV-C1	6%
9	C2	5%	SUV-E2	4%	SUV-E2	4%
10	MPV-C	4%	C2	3%	MPV-C	4%

## Most popular car segment in 2022:

D2  
segment

BMW 3 Series



The **SUV dominance** in the top 10 continues, with SUVs making up 35% of cars in 2020 to 46% in 2022.

The premium **SUV-D2** segment has increased in popularity the most, from 11% in 2020 to 16% in 2022.

The **D2 and D1** segment lost the most share, decreasing by about 2 p.p.\*\*.

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

\*\* p.p. = percentage points

# In 2022, the Volkswagen Golf is the most popular car model in the Technology industry fleets

## Most driven car models, 2020-2022

	2020	2021	2022
1	Volkswagen Passat	Tesla Model 3	Volkswagen Golf
2	Mercedes-Benz C-Class	Volkswagen Passat	BMW 5 Series
3	BMW 3 Series	BMW 3 Series	Tesla Model Y
4	Mercedes-Benz Glc-Class	Peugeot 3008	Volkswagen Tiguan
5	Volkswagen Golf	Mercedes-Benz Glc-Class	Mercedes-Benz C-Class
6	Volkswagen Tiguan	BMW 5 Series	Volvo XC60
7	Tesla Model 3	Volkswagen Golf	Peugeot 3008
8	BMW X1	BMW X3	Volkswagen Passat
9	Mercedes-Benz E-Class	Volkswagen Tiguan	Volvo XC40
10	Peugeot 3008	BMW X1	Tesla Model 3

## Most popular car in 2022:

Volkswagen  
Golf



The **BMW 5 Series** has become the second most popular vehicle and has climbed the charts the most over the past two years.

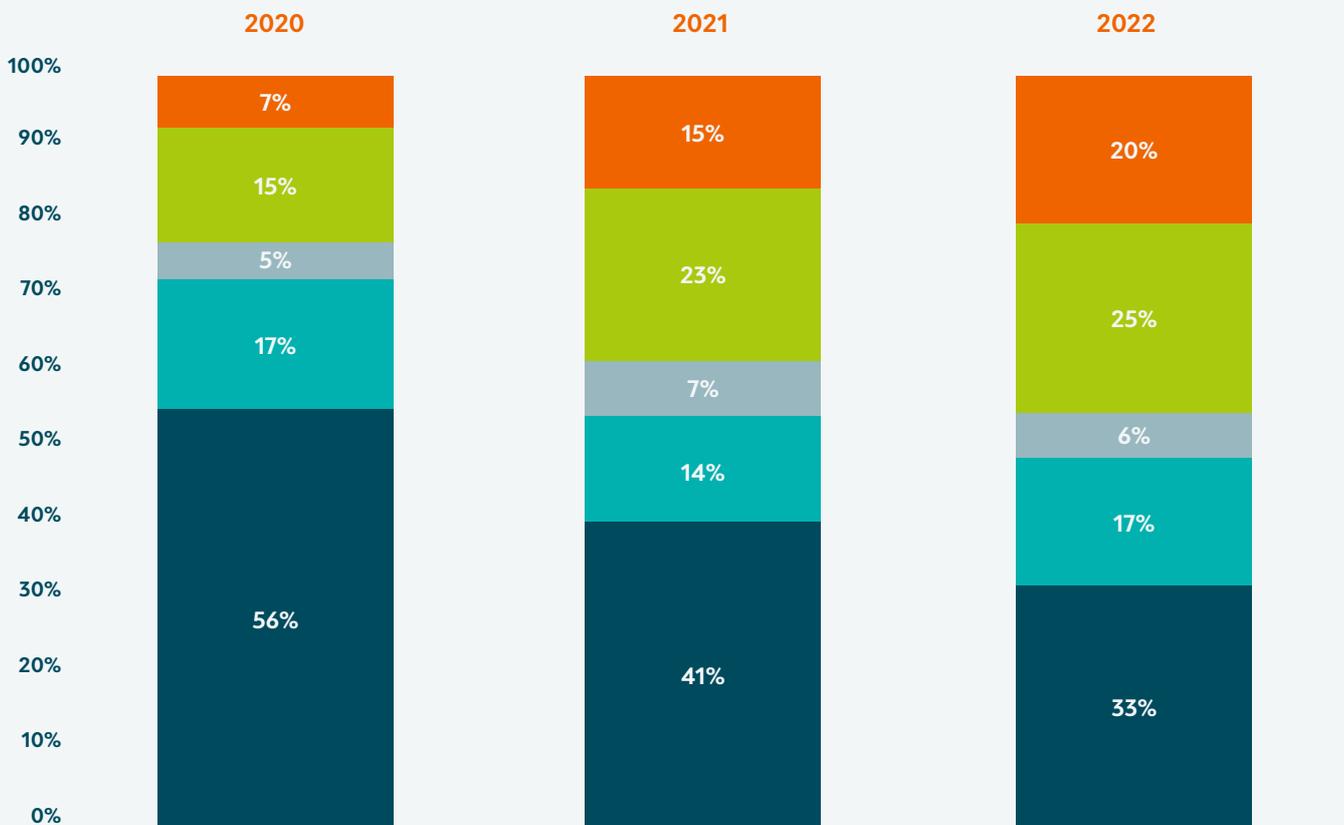
**Tesla** is now in the top 10 with both the model Y and 3, which is remarkable given that these models have only been on the market in Europe for a couple of years.

The Tesla model 3 has dropped from 1st place in 2021 to 10th place in 2023.

# Diesel has declined in fleet share by 23 percentage points since 2020

## Trends in powertrains, 2020-2022

● Diesel ● Petrol ● Hybrid ● PHEV ● BEV



The share of BEVs has increased significantly by **13 p.p.\***, making it more popular than petrol.

Petrol has stabilized at **17%**.

Hybrids and PHEVs remain stable.

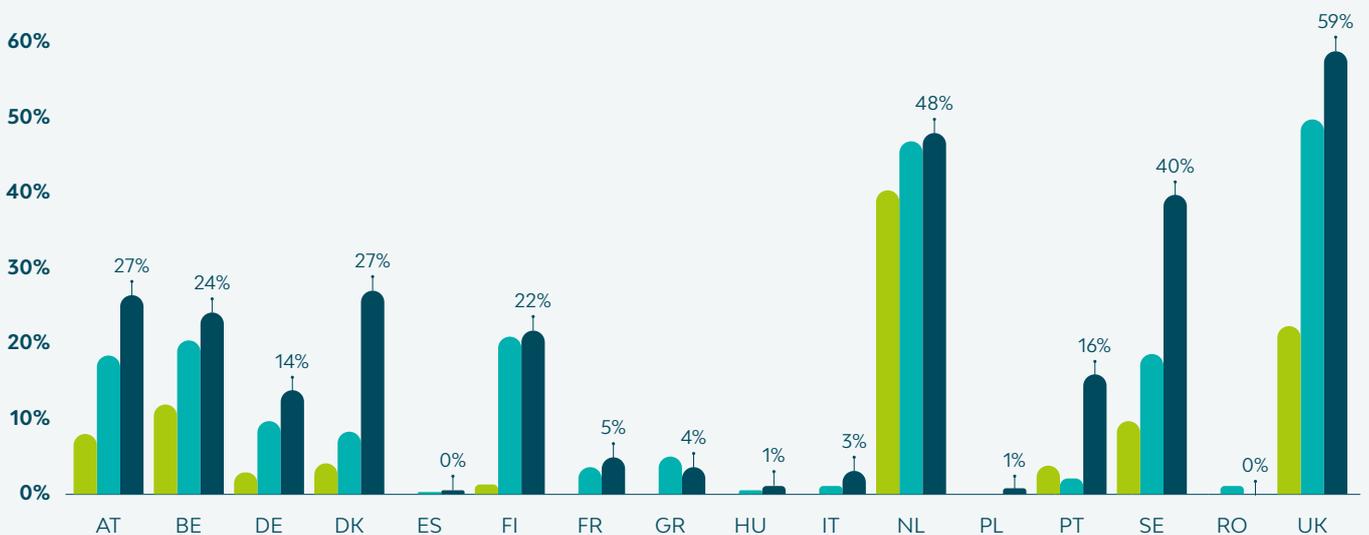
The share of PHEVs has also increased, by **10 p.p.\***, making it the second most popular fuel type.

\*P.P = Percentage Points

# In almost all Northern and Western European countries, the EV transitioning has accelerated in 2022

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

● 2020 ● 2021 ● 2022



**The UK** has surpassed The Netherlands as EV frontrunner with a share of 59% in 2022.

Since 2020, **the UK** has also seen the largest increase in BEV share, with a 36 percentage point change.

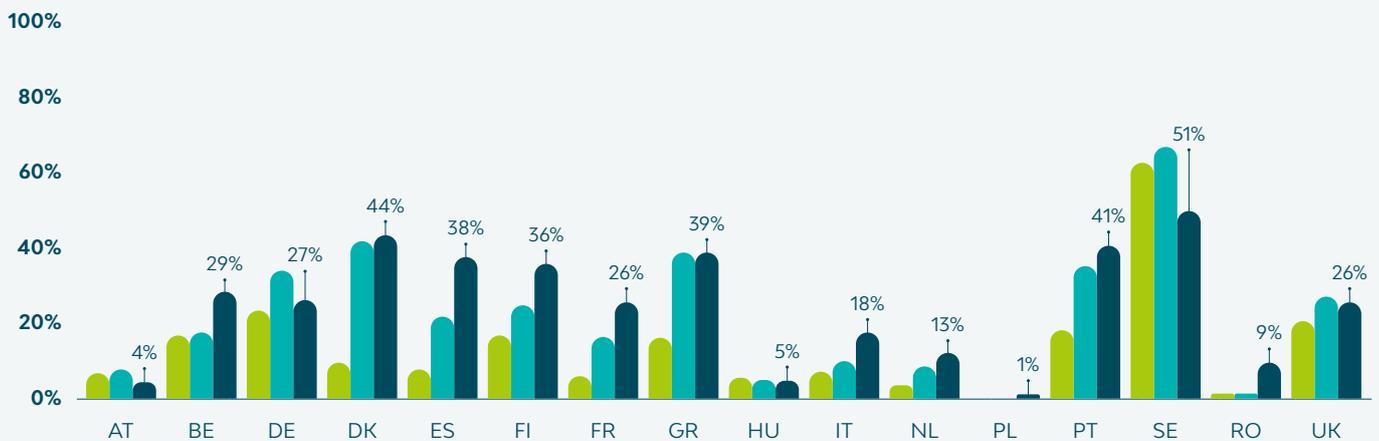
Between 2021 and 2022, **Portugal, Sweden** and **Denmark** have seen huge increases in BEV share.

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

# In most countries, PHEV has increased in the past few years

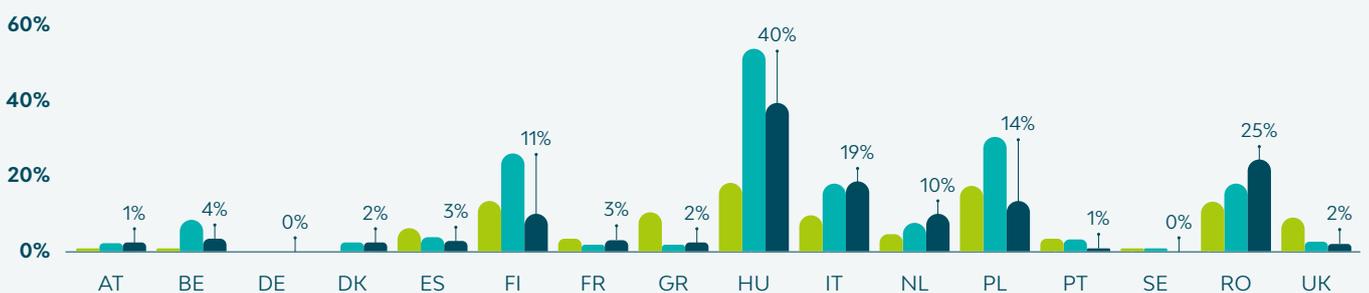
### Share of PHEV per country\*, 2020-2022

● 2020 ● 2021 ● 2022



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

● 2020 ● 2021 ● 2022



**Denmark** has seen the largest increase in PHEV share by 34 p.p.

Sweden has the largest share of PHEV at 51% but it has declined compared to previous years

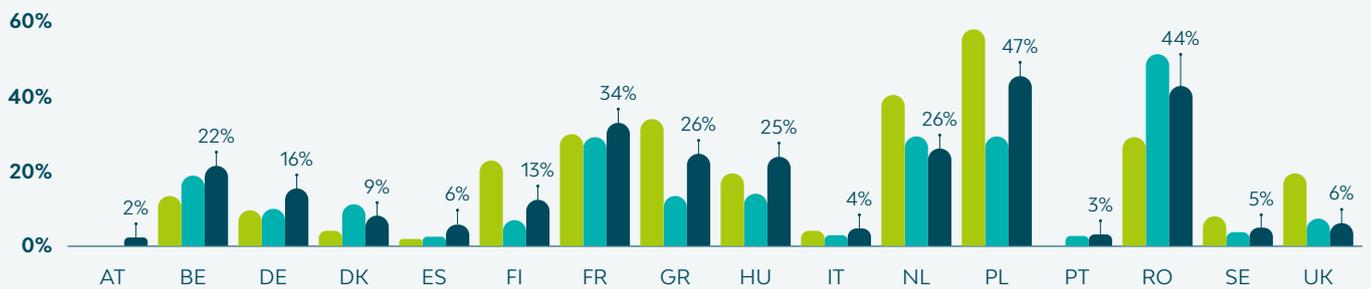
**Hungary** has the largest hybrid share with 40% in 2022, although it declined compared to 2021.

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

The shift away from diesel is seen in every country, only Poland saw an increase between 2020 and 2022

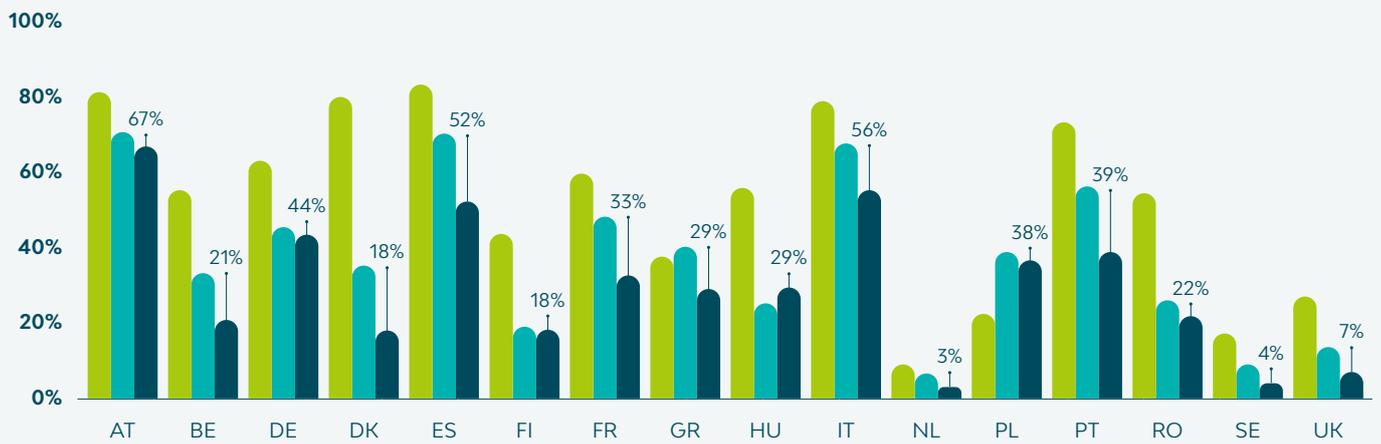
### Share of petrol per country\* 2020-2022

● 2020 ● 2021 ● 2022



### Share of diesel per country\* 2020-2022

● 2020 ● 2021 ● 2022



**Poland** has the largest share of petrol at 47% in 2022, but it did decrease from 59% in 2020.

**Austria** still has the highest share of diesel at 67% in 2022.

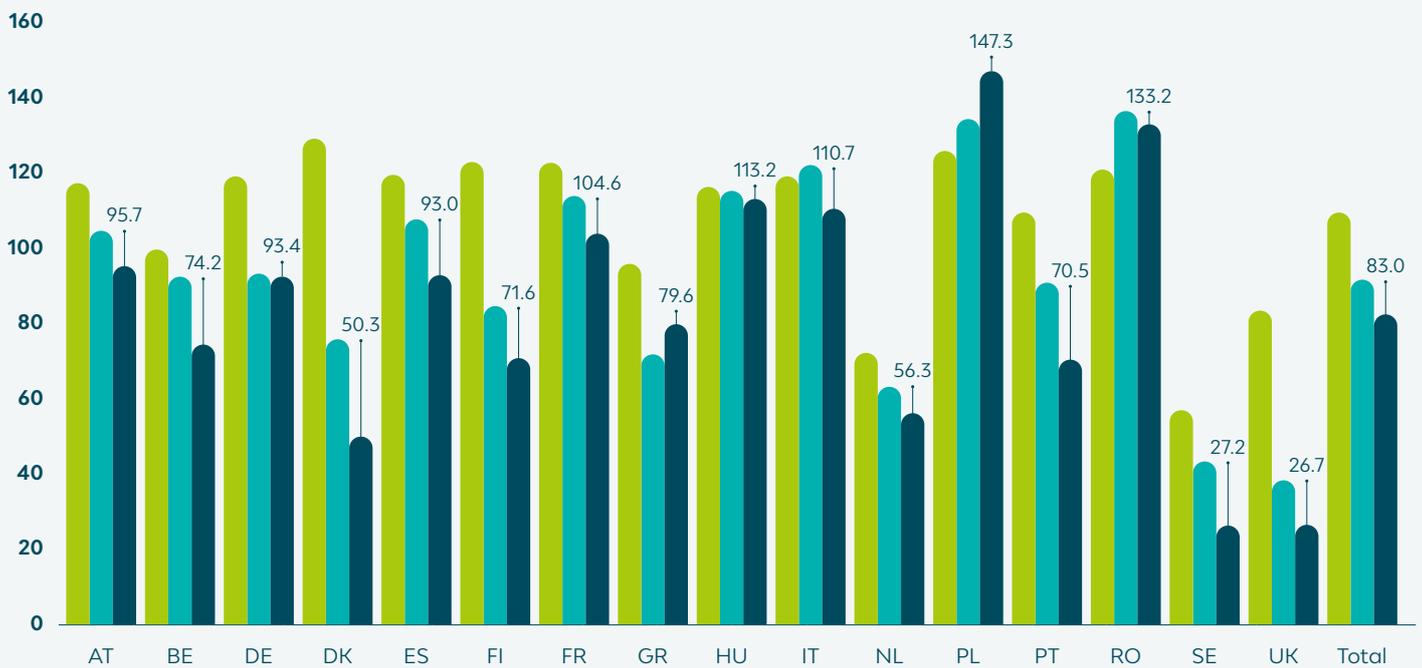
**The Netherlands** has the lowest share of diesel with only 3% in 2022.

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

Overall, the technology industry has lowered its average CO<sub>2</sub> emissions by 27.0 g/km to 83.0 g/km in 2022

### CO<sub>2</sub> average per country\*\*, 2021-2022

● 2020 ● 2021 ● 2022



The majority of the countries show a decline in average CO<sub>2</sub> emissions, except for **Poland** and **Romania**.

**Poland** has the highest average CO<sub>2</sub> emissions (147.3 g/km) and it has actually increased significantly over the past years.

**The UK** and **Sweden** have the lowest average CO<sub>2</sub> emissions (26.7 g/km and 27.2 g/km respectively).

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

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

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



**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)	 <b>B1 – VW Polo</b>	 <b>SUV-B1 – VW T-Cross</b>	Not common	 <b>B2 – Mini Cooper</b>	Not common	 <b>Small – VW Caddy</b>
Compact cars (C)	 <b>C1 – VW Golf</b>	 <b>SUV-C1 – VW T-Roc</b>	 <b>MPV-C – VW Touran</b>	 <b>C2 – BMW 1 series</b>	 <b>SUV-C2 – BMW X1</b>	 <b>Medium – VW Transporter</b>
Midsized cars (D)	 <b>D1 – VW Passat</b>	 <b>SUV-D1 – VW Tiguan</b>	 <b>MPV-D – VW Sharan</b>	 <b>D2 – BMW 3 series</b>	 <b>SUV-D2 – BMW X3</b>	 <b>Large – VW Crafter</b>
Full-size cars (E)				 <b>E2 – BMW 5 series</b>	 <b>SUV-E2 – BMW X5</b>	 <b>Pickup</b>