



Consumer Goods

# industry benchmark 2019-2021

Fleet trends in the  
consumer goods industry  
**June 2022**



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In this consumer goods industry benchmark report, we highlight the most important fleet trends in Europe by comparing the passenger car registrations between 2019 and 2021.

We are using the following definition of the consumer goods industry: *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 (2019, 2020 and 2021).

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

# The C1 segment remains the most popular car segment

## Most driven car segments\*, 2019-2021

	2019		2020		2021	
1	C1	30%	C1	26%	C1	24%
2	D1	11%	SUV-C1	13%	D1	14%
3	SUV-C1	10%	D1	11%	SUV-D1	13%
4	D2	10%	B1	9%	SUV-C1	12%
5	B1	8%	D2	9%	D2	10%
6	E2	5%	SUV-D2	5%	SUV-C2	6%
7	MPV-C	5%	SUV-B1	4%	SUV-D2	6%
8	SUV-C2	4%	C2	4%	E2	4%
9	C2	4%	MPV-C	4%	C2	3%
10	SUV-D2	4%	SUV-C2	4%	B1	3%

## Most popular car segment in 2021:

C1  
segment  
Toyota Corolla



The **C1 segment** has decreased in popularity (30% in 2019 to 24% in 2021), but it remains the most popular car segment.

**The SUV trend continues** with a doubling of the share in the top 10 from 18% in 2019 to 37% in 2021.

The largest gaining car segment is the **SUV-D1 segment**, which was not in the top 10 in 2019 and constitutes 13% in 2021.

The largest decrease in share happened to the **B1 segment** from 8% in 2019 to 3% in 2021.

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

# The Toyota Corolla takes the top spot as the most popular car

## Most driven cars\*, 2019-2021

	2019	2020	2021
1	Skoda Octavia	Skoda Octavia	Toyota Corolla
2	Ford Focus	Toyota Corolla	Skoda Octavia
3	Volkswagen Passat	Volkswagen Passat	BMW 3 Series
4	Renault Clio	Peugeot 308	Ford Mondeo
5	Volkswagen Golf	Ford Focus	Skoda Superb
6	Peugeot 308	Skoda Fabia	Peugeot 3008
7	BMW 3 Series	Volkswagen Tiguan	Volkswagen Passat
8	Volkswagen Tiguan	Peugeot 3008	Ford Kuga
9	Peugeot 3008	Renault Clio	Peugeot 2008
10	Audi A4	Skoda Superb	Ford Focus

## Most popular car in 2021:

Toyota  
Corolla



The **Toyota Corolla** has overtaken the Skoda Octavia to become the most popular vehicle.

The **Skoda Octavia** is still a very popular vehicle with the first place in 2019 & 2020 and the second place in 2021.

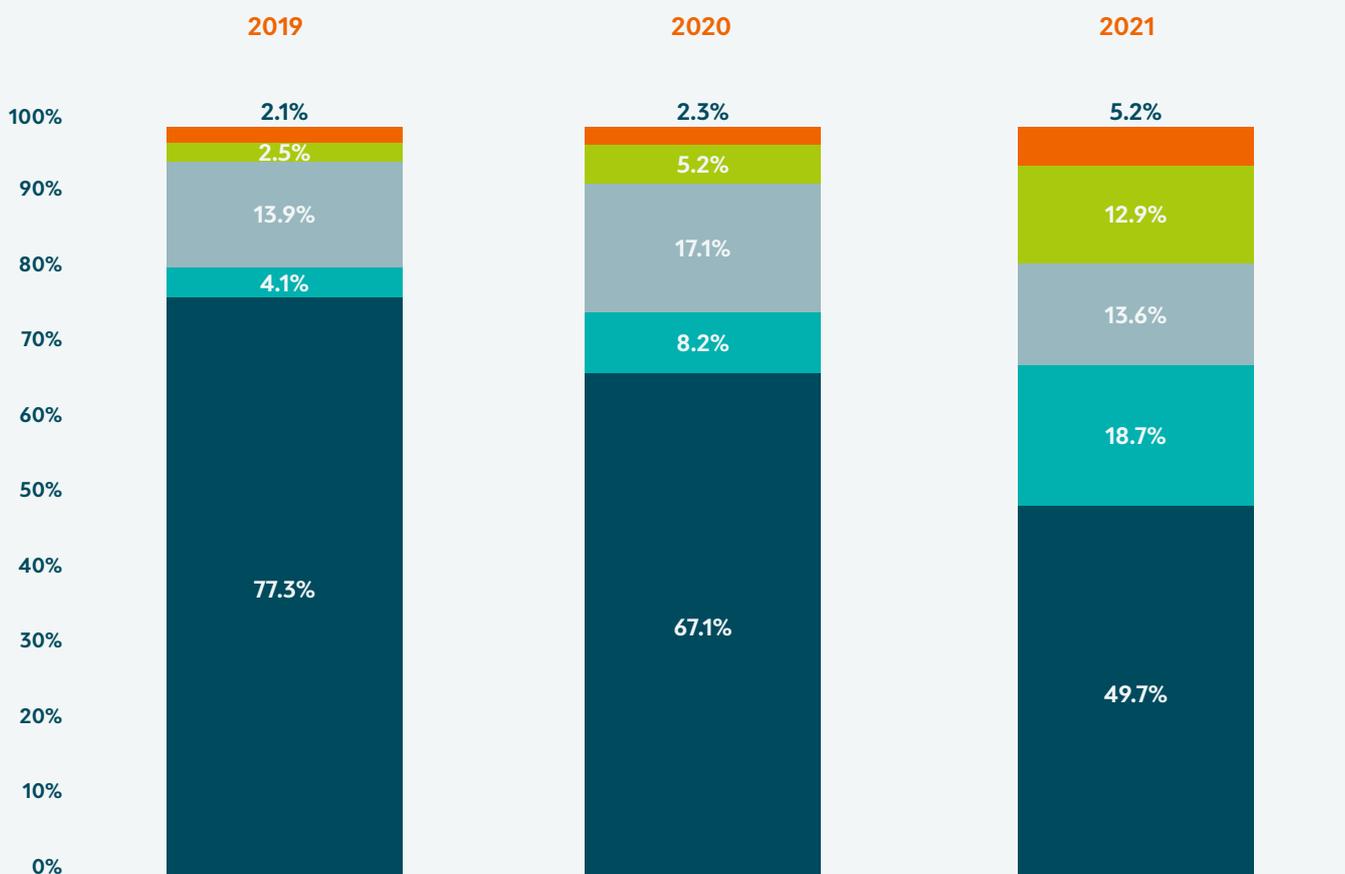
The **Ford Focus** has dropped significantly in popularity, moving from second place in 2019 place to the 10th place in 2021.

**Ford** car models became popular, with three places in the top 10, while the **Volkswagen group** has dropped from five to three places.

# BEVs & PHEVs have more than doubled in share in the past year

## Trends in fuel types, 2019-2021

● Diesel ● Hybrid ● Petrol ● PHEV ● BEV



Given the increasing pressure to reduce emissions from fuel, it is no surprise that the share of diesel declined by **27.6% p.p\***.

Hybrid has increased by **14.6% p.p\*** now being a more popular fuel type than petrol. PHEV has increased significantly with an increase of **10.4% p.p\***.

**Petrol has stabilised** as a result of emerging alternative fuels types.

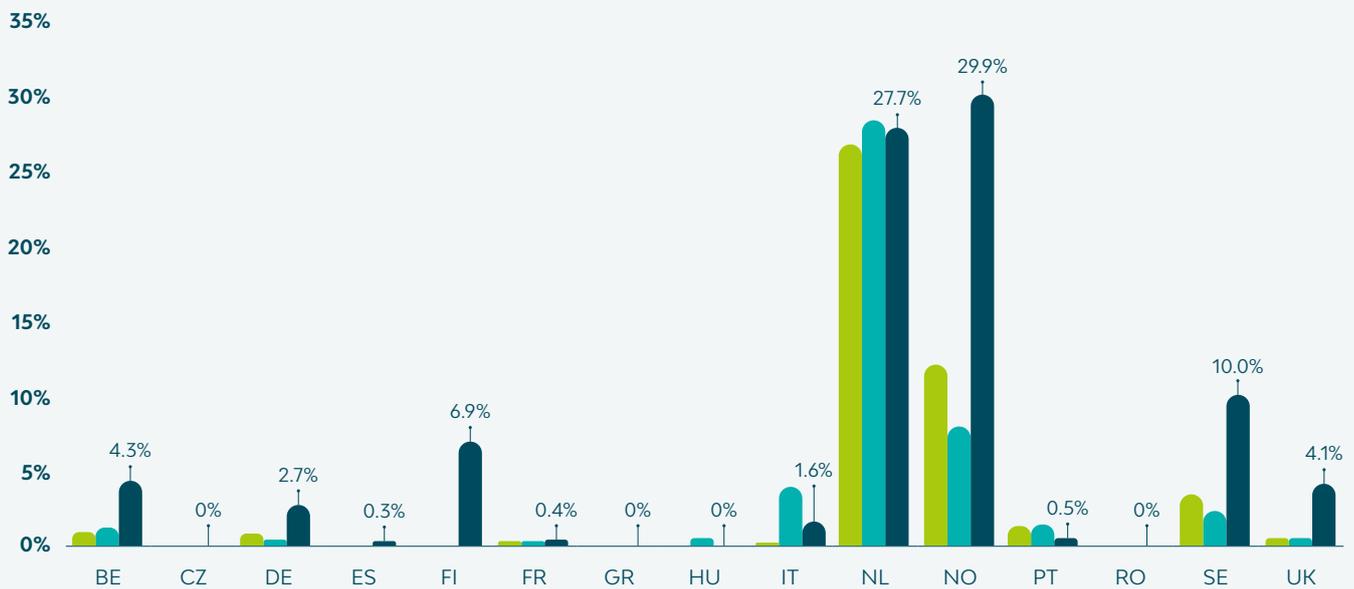
The share of battery electric vehicles (BEVs) has increased by **3.1% p.p\***. After a slow year in 2020, the EV continues to rise in 2021.

\*P.P = Percentage Points

# Norway overtakes the Netherlands in BEV share

## Share of electric per country\*, 2019-2021

● 2019 ● 2020 ● 2021



When it comes to BEVs, Norway has surpassed the Netherlands with **a share of 29.9% in 2021.**

Several Northern European countries have significantly increased the share of BEVs in 2021\*\*.

The share of BEV in The Netherlands has been constant over the last three years with an average of **27.5%.**

The BEV trend has yet to start in South and East Europe.

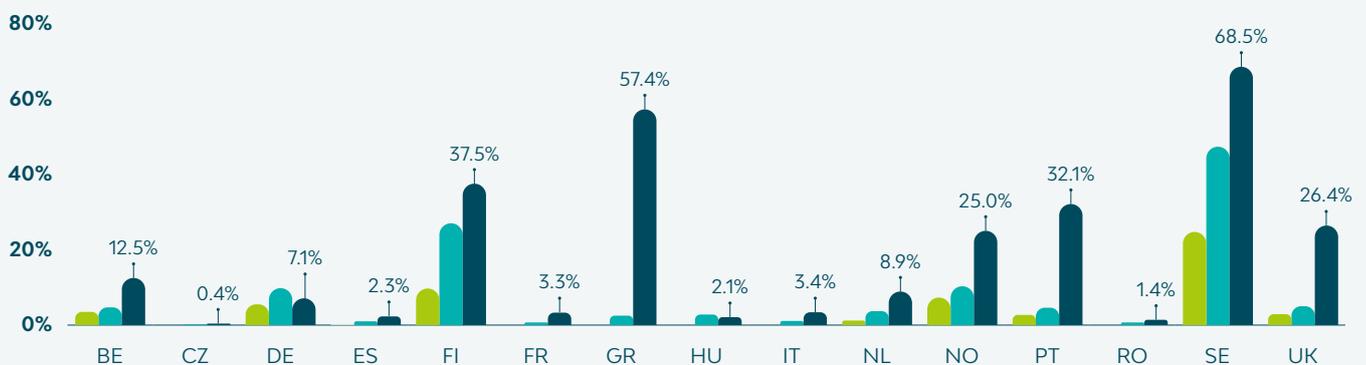
\*Only countries are shown here with at least 100 renewals each year to ensure a representative sample size

\*\*See the LeasePlan EV Readiness Index 2022

Share of PHEVs increased dramatically while hybrids remain stable or have slightly decreased in some countries

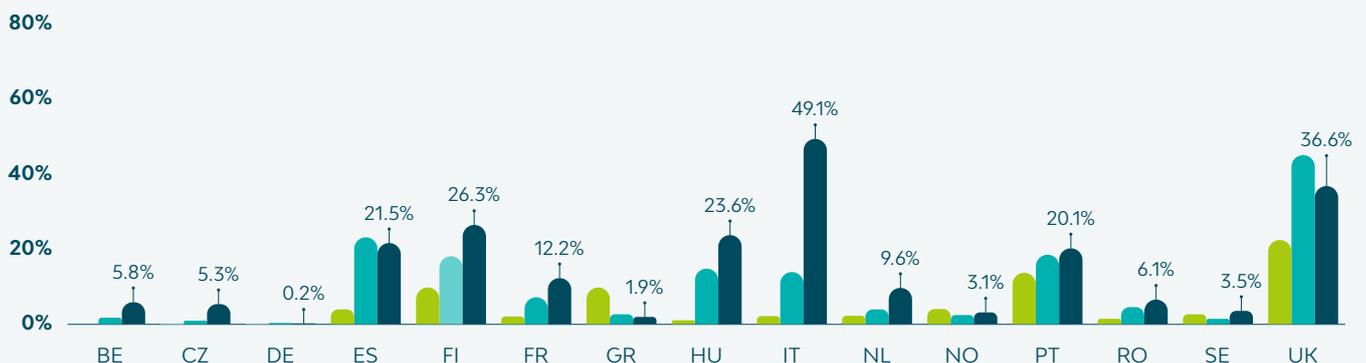
Share of PHEV per country\*, 2019-2021

● 2019 ● 2020 ● 2021



Share of hybrids per country\*, 2019-2021

● 2019 ● 2020 ● 2021



Sweden has the largest share of PHEVs with **68.5% of all vehicles in 2021 being a PHEV.**

In the UK, PHEVs are popular in 2021 as well. More than 1 in every 4 vehicles is a PHEV.

Greece has shown a large interest in PHEVs in 2021 with 57.4% of all vehicles being PHEV.

In Italy, almost half of the vehicles in 2021 (49.1%) were hybrid vehicles.

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

# Diesel continues its steady decline in popularity but petrol cars are not uniformly following the same trend

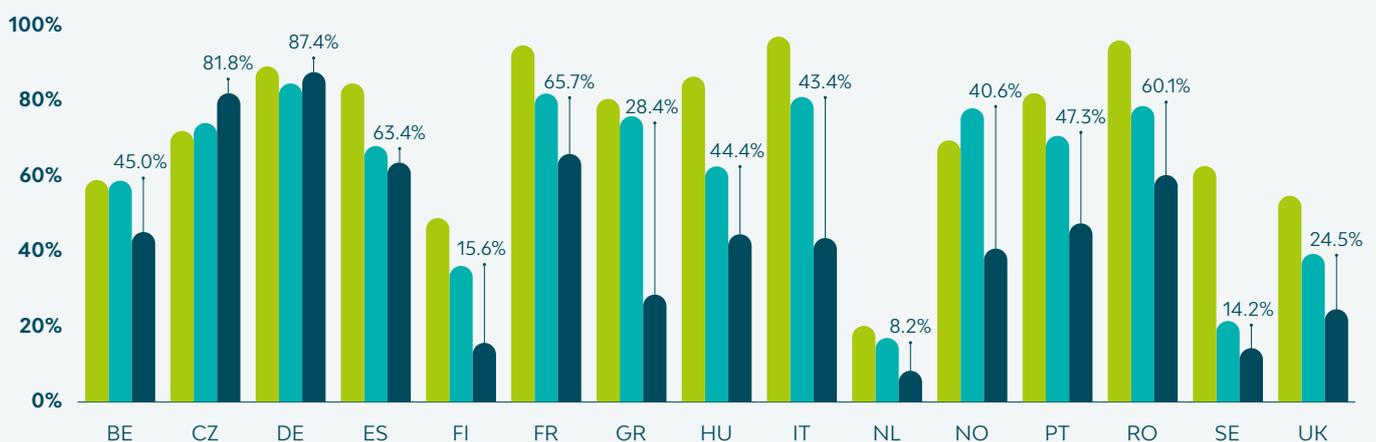
## Share of petrol per country\* 2019-2021

● 2019 ● 2020 ● 2021



## Share of diesel per country\*, 2019-2021

● 2019 ● 2020 ● 2021



The Netherlands has the largest share of petrol, **45.5% in 2021**.

The Netherlands has the lowest share of diesel with **only 8.2% in 2021**.

The shift away from diesel is seen in every country except Germany and Czech Republic.

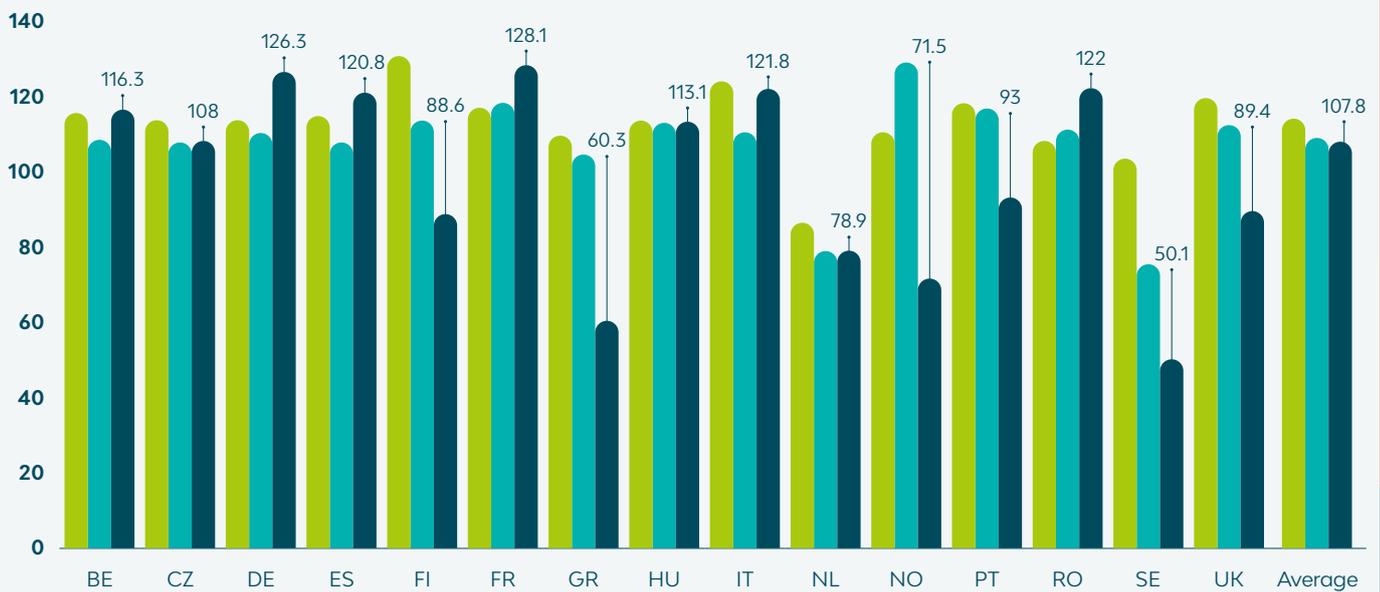
Sweden has seen the largest drop in diesel, **from 62.5% in 2019 to 14.2% in 2021**.

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

CO<sub>2</sub> averages\* have decreased but the difference between countries is stark

### CO<sub>2</sub> average per country\*\*, 2019-2021

● 2019 ● 2020 ● 2021



Several countries in Europe show a large drop in CO<sub>2</sub> in 2021 (Finland, Greece, Norway, Sweden) compared to 2019, however other countries see average CO<sub>2</sub> stabilize or even slightly increase.

**Sweden has the lowest average CO<sub>2</sub>** (50.1 grams per km) because of its high share of BEVs & PHEVs.

**France has the highest average CO<sub>2</sub>**, (128.1 grams per km) and is also one of the few countries showing an increase in CO<sub>2</sub> each year.

\*Based on OEM reported CO<sub>2</sub>

\*\*Only countries are shown here with at least 200 renewals each year to ensure representative statistics

# Conclusion

The C1 segment is still the most popular segment in the Consumer Goods industry. The Toyota Corolla has overtaken the Skoda Octavia as the most popular vehicle in 2021.

The switch from diesel to other fuel types is clear with a decrease of 27.6% from 2019 to 2021.

Furthermore, there are large differences per country in the pace of moving away from diesel. While in the Netherlands only 8.2% of vehicles were registered as diesel, this is still +80% for Germany and Czech Republic.

The average CO<sub>2</sub> emissions over all countries has slightly decreased in 2021, however there are significant differences per country. Sweden has the lowest average CO<sub>2</sub> with 50.1 g/km\*, while France has an average of 128.1 g/km\*.

\*Based on OEM reported CO<sub>2</sub> averages



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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