Healthcare & Pharma industry benchmark 2019-2021

Fleet trends in the European healthcare & pharma
June 2022

LeasePlan International Consultancy Services

Contents

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

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 (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 SUV segment gained in popularity but the C1 segment remained the most popular

Most driven car segments*, 2019-2021

	2019		2020		2021	
1	D2	17%	C1	22%	C1	14%
2	C1	17%	D2	14%	SUV-D2	13%
3	SUV-C1	12%	D1	14%	D2	13%
4	D1	12%	SUV-C1	12%	SUV-C2	12%
5	E2	8%	SUV-D2	6%	SUV-D1	10%
6	SUV-C2	7%	SUV-C2	6%	SUV-C1	10%
7	SUV-D2	6%	E2	5%	D1	9%
8	C2	6%	C2	5%	C2	6%
9	SUV-D1	4%	SUV-B1	4%	E2	6%
10	MPV-C	3%	SUV-D1	3%	SUV-E2	2%

Most popular car segment in 2021:

C1 segment
Volkswagen Golf

* For more information on car segments, please see Appendix A

The **C1 segment** has remained the most popular car segment, but decreased in share (from 22% in 2020 to 14% in 2021).

The SUV trend continues with a significant increase in its share in the top 10 (from 25% in 2019 to 47% in 2021).

The premium segments have increased in share, from 44% in 2019 to 62% in 2021.

The Toyota Corolla was the most popular car in 2021

Most driven car models, 2019-2021

	2019	2020	2021
1	Volkswagen Passat	Volkswagen Passat	Toyota Corolla
2	Volkswagen Golf	Volkswagen Golf	BMW X1
3	Audi A4	Toyota Corolla	Volkswagen Passat
4	Skoda Octavia	Skoda Octavia	BMW 3 Series
5	Peugeot 3008	BMW 3 Series	Mercedes Benz Glc-Class
6	Mercedes Benz C-Class	Peugeot 3008	Audi A4
7	Volkswagen Tiguan	Volkswagen Tiguan	BMW 5 Series
8	BMW 3 Series	Volkswagen T-Roc	Audi Q3
9	BMW 5 Series	Ford Focus	Peugeot 3008
10	Toyota Corolla	Audi A4	Volkswagen Tiguan

Most popular car in 2021:

Toyota Corolla

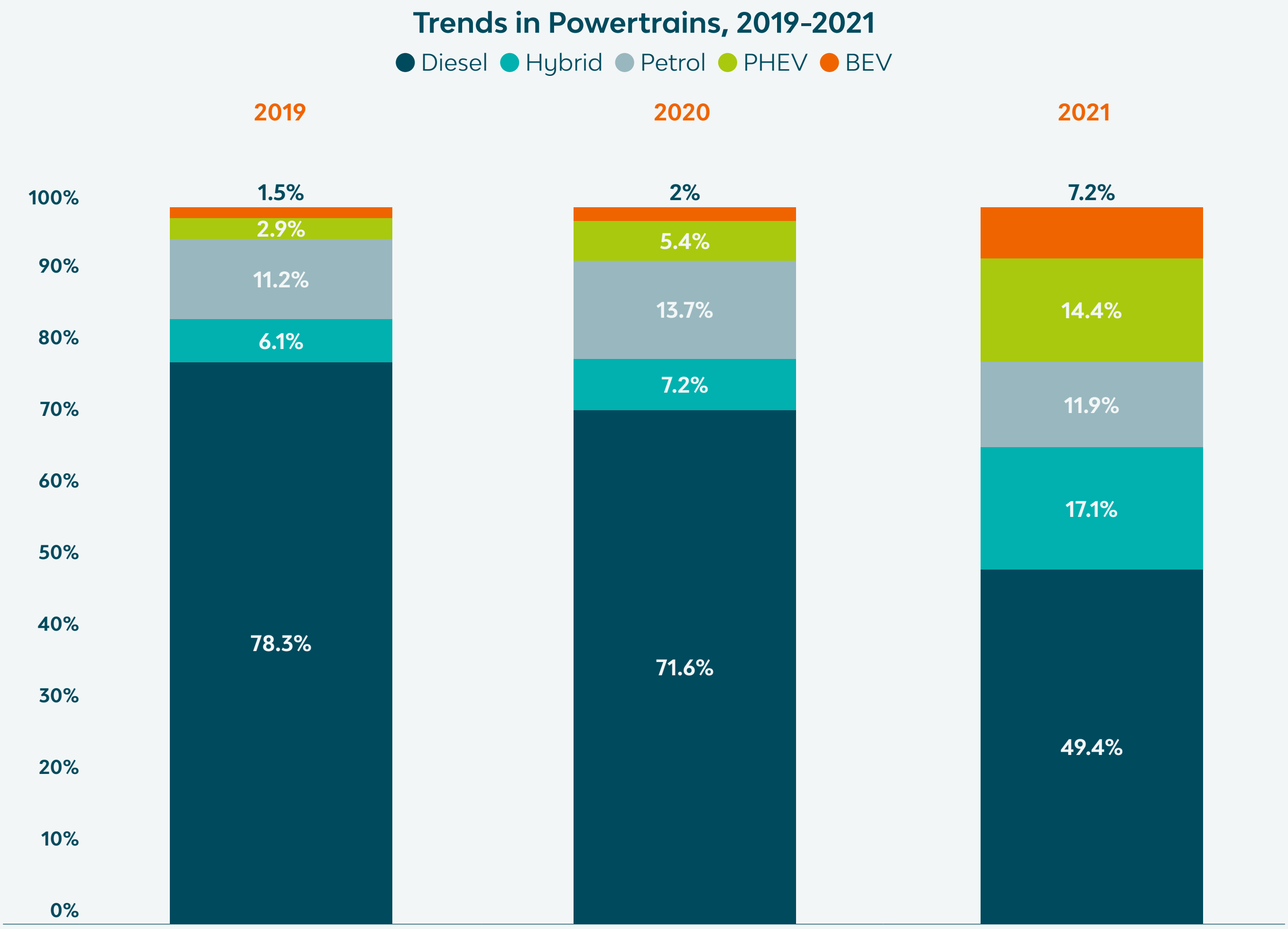
The **Toyota Corolla** has become the most popular car model, moving from 10th place in 2019 to 1st place in 2021.

The **BMW X1** has taken the second place while not being in the top 10 previously.

BMW has increased its share and position in the top 10 the most compared to 2019.

The **Volkswagen group** has decreased the most in popularity with a drop in both the number and position of their models.

Battery electric vehicle (BEV) share increased 5.7% p.p



Given the increasing sustainable pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 28.9% p.p*.**

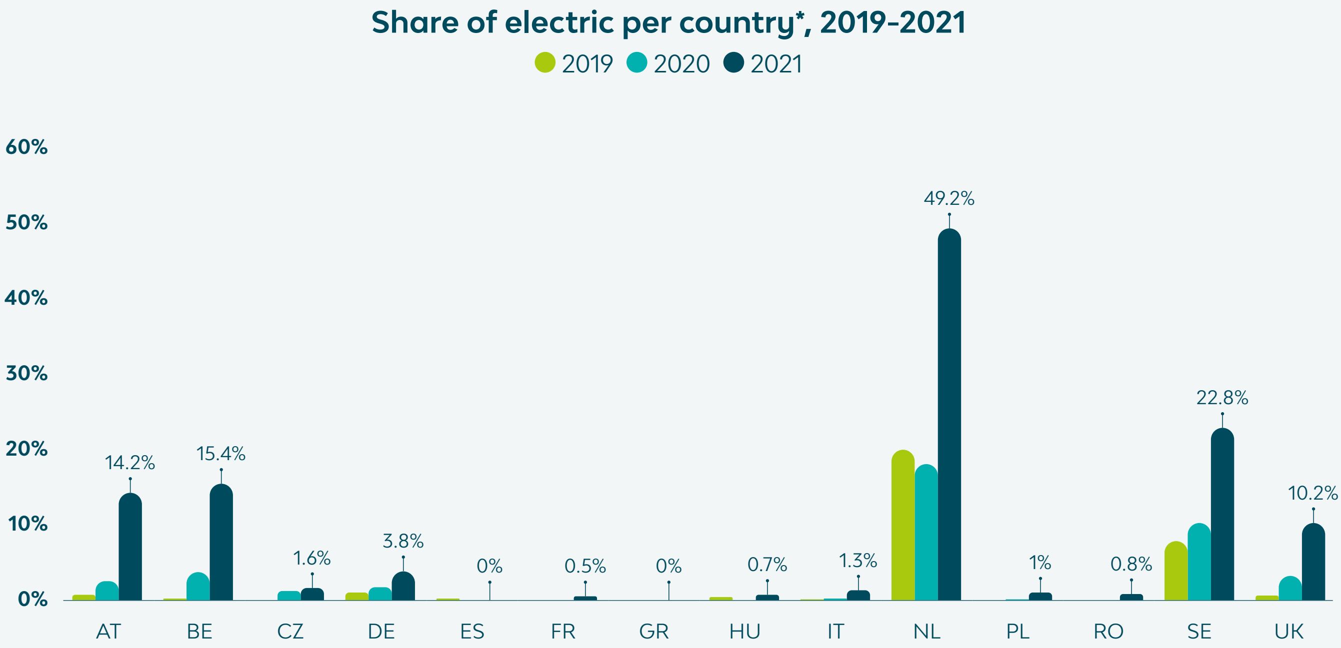
PHEV has increased significantly, with an increase of 11.5% p.p.

Hybrid has seen an **increase of 11.0% p.p,** more than doubling its share from 2019.

Petrol has stabilized at around 12% market share.

*P.P = Percentage Points

Country fuel mix highlighted BEV, 2019-2021



When it comes to BEVs, the Netherlands is ahead with **a share of 49.2% in 2021.**

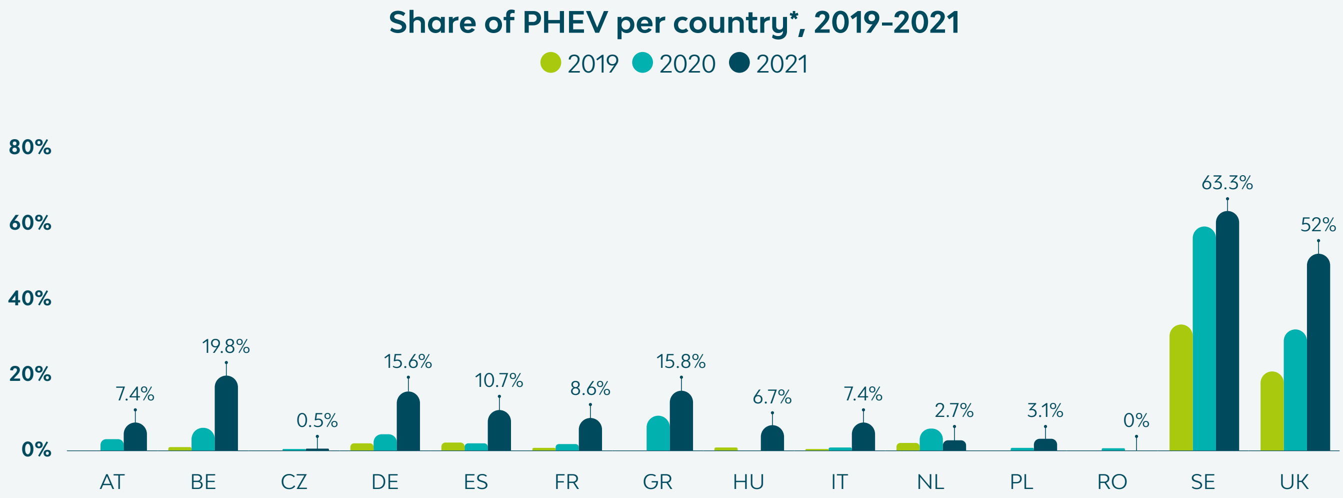
Sweden is second with share of **22.8%.**

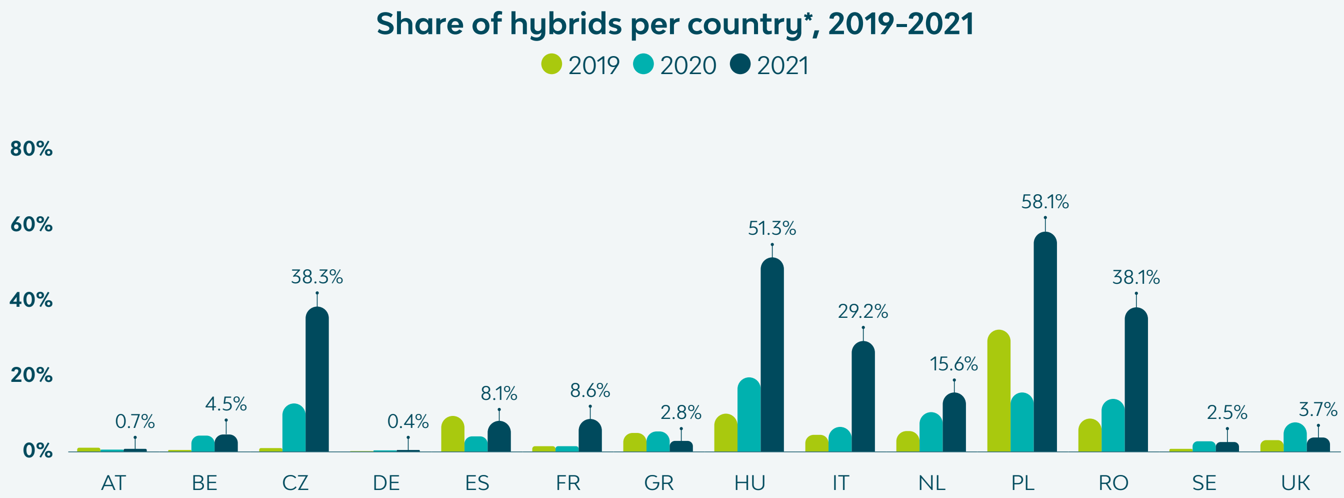
Overall, most countries have seen their largest increase in BEV share in the past year**.

The BEV trend has yet to start in South and East Europe with only 1% BEV share or lower.

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

Country fuel mix highlighted PHEV & hybrid vehicles, 2019-2021





The share of PHEV is the largest in Sweden with **63.3%**, followed by the UK with **52.0%.**

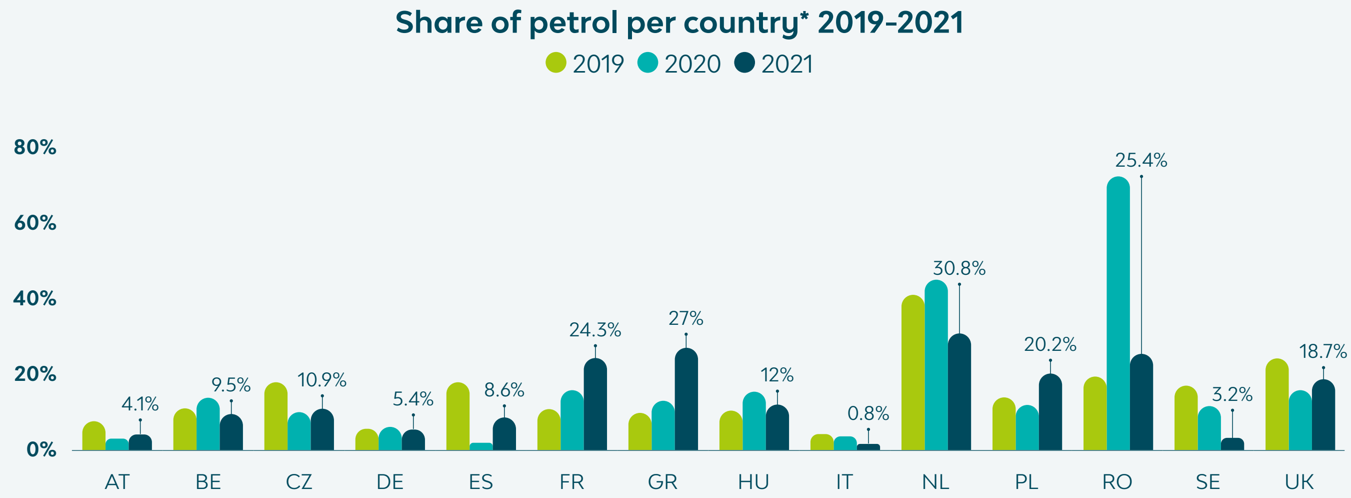
Almost all countries saw a significant increase in their share of PHEV in 2021.

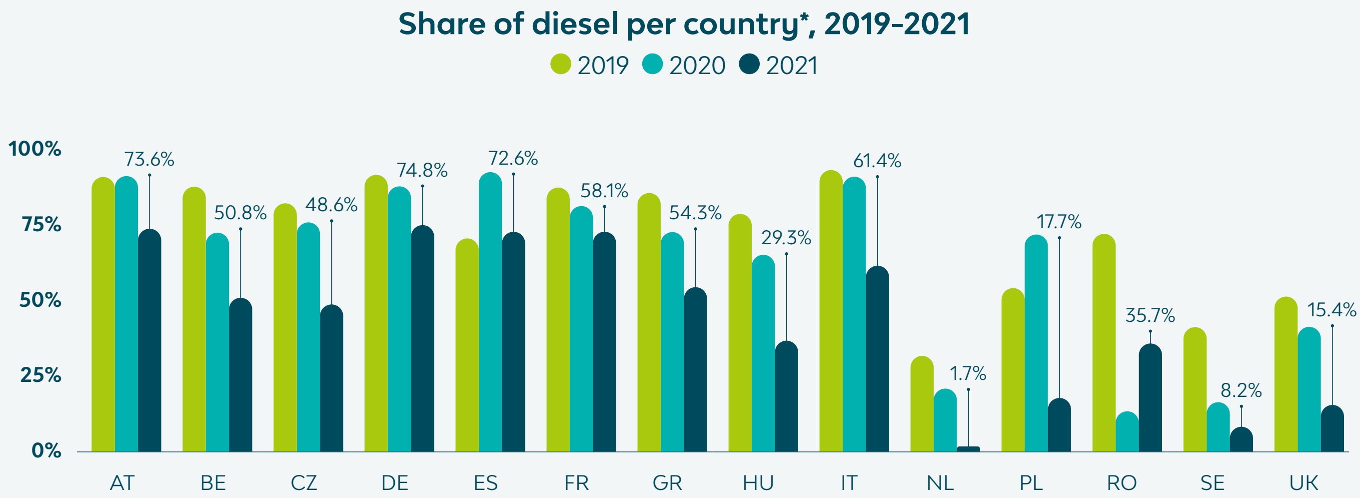
Poland has the largest share of hybrids with **58.1%** followed by Hungary with **51.3%.**

Hybrids are most popular in Eastern European countries.

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

Country fuel mix highlighted petrol & diesel vehicles, 2019-2021





The Netherlands has the largest share of petrol with **30.8%.**

There is no clear trend when it comes to petrol share across the countries with some increasing and some declining.

Every country shows a steady decline in the share of diesel.

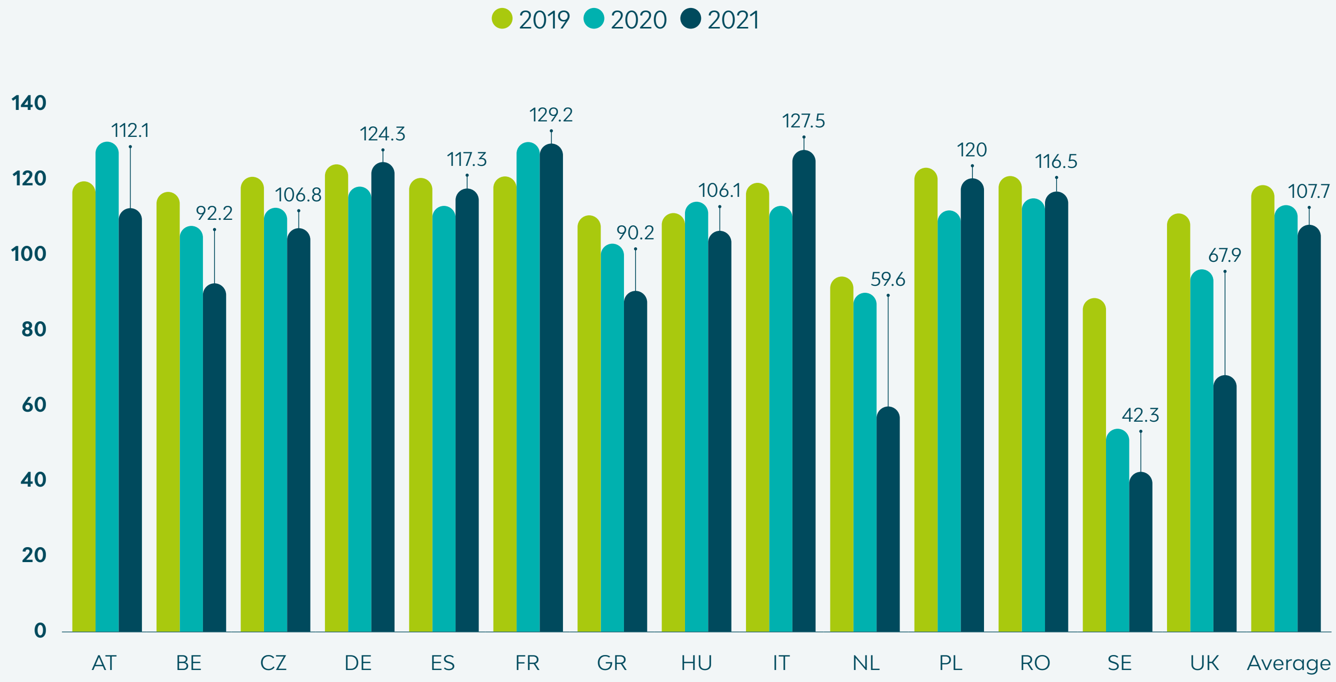
Germany still has the largest share of diesel with **74.8%.**

The Netherlands has the lowest share of diesel with **1.7%.**

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

Average CO_2 emissions* dropped but there were increases in 6 countries over the past year

CO_2 average per country, 2019-2021**



The average CO_2 in the Pharma & Healthcare industry has dropped to **107.7 grams per km.**

Sweden has the lowest average CO_2 (42.3 grams per km) primarily because of its surge in PHEV adoption.

France has the highest average CO_2 (129.2 grams per km), due to its relatively low adoption of low and zero emitting powertrains.

*Based on the OEMs reported CO_2

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

Conclusion

The C1 segment has remained the most popular segment in the healthcare & pharma industry, however its share declined from 22% to 14% and only one C1 vehicle (the Toyota Corolla) can be found in the top 10.

The switch from diesel to low emitting powertrains continues. The share of BEV, PHEV and hybrid have all increased significantly (+4.7% p.p., +11.5% p.p., and +11.0% p.p., respectively).

However, there are large differences per country in the pace of moving away from diesel. While in the Netherlands only 1.7% of vehicles were registered as diesel, in Germany this was still 74.8%.

Due to the large share of PHEV registrations in 2021 (63.3%) and BEV (22.8%), Sweden has achieved the lowest average CO_2 (42.3 grams per km)*, while France has the highest average CO_2 (129.2 grams per km)*.

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

*Based on OEM reported CO_2 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