

Technology

# industry benchmark 2019-2021

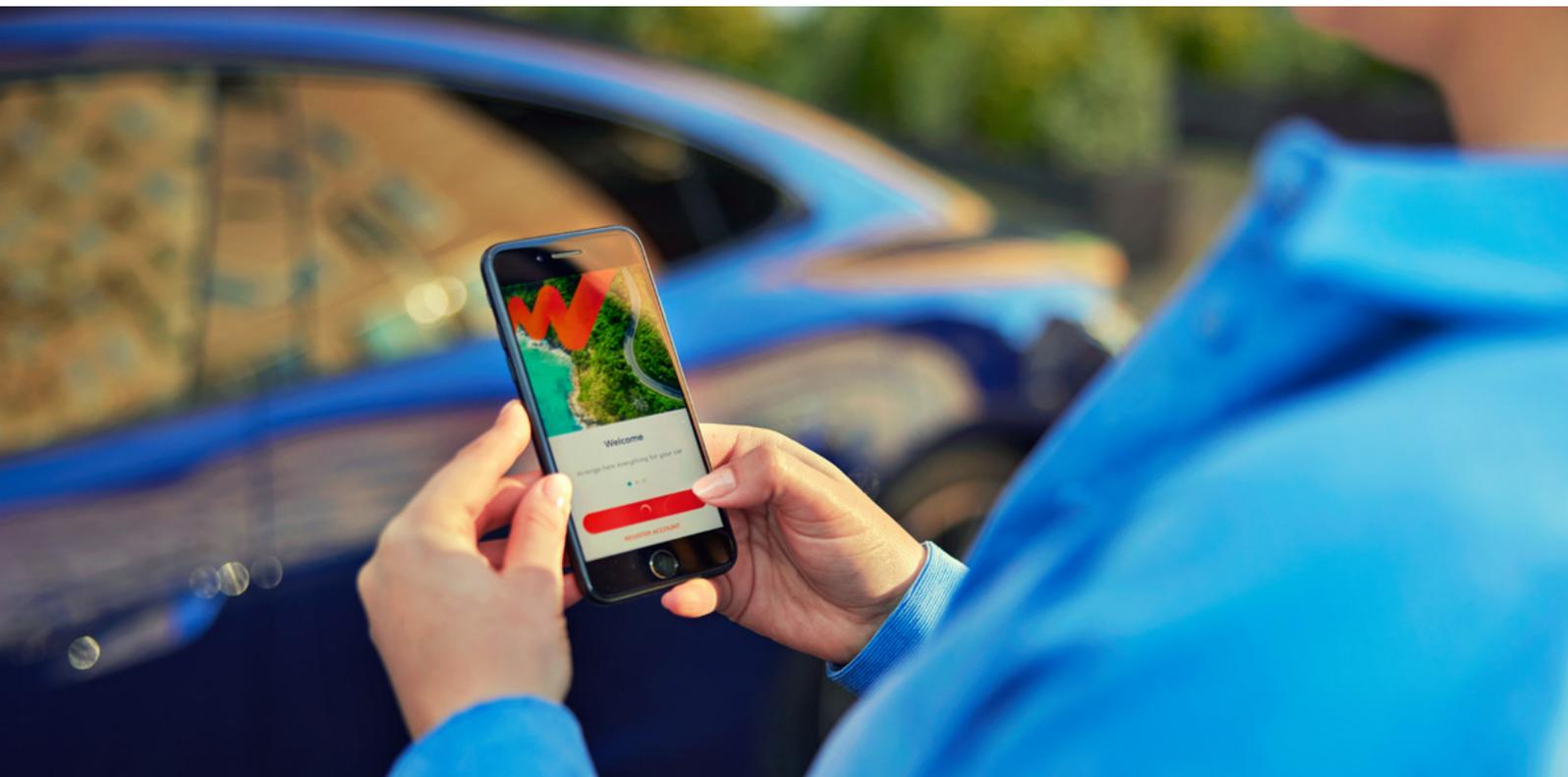
Fleet trends in the European  
technology industry  
**June 2022**



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In this technology 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 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 (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 D2 segment was the most popular car segment for the third year in a row

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

	2019		2020		2021	
1	D2	19%	D2	17%	D2	17%
2	C1	18%	C1	13%	SUV-D2	14%
3	SUV-C1	10%	SUV-D2	11%	C1	11%
4	E2	10%	SUV-C1	11%	SUV-D1	11%
5	D1	9%	D1	10%	SUV-C1	9%
6	SUV-D2	6%	E2	8%	D1	9%
7	C2	6%	C2	6%	E2	8%
8	SUV-C2	5%	SUV-C2	6%	SUV-C2	7%
9	MPV-C	4%	SUV-D1	3%	C2	4%
10	B1	3%	B1	3%	SUV-E2	3%

## Most popular car segment in 2021:

D2  
segment  
BMW 3 Series



The **SUV trend continues** with a significant increase in its share in the top 10 from 21% in 2019 to 44% in 2021.

The premium **SUV-D2** segment has increased in popularity the most from 6% in 2019 to 14% in 2021.

The **C1 segment** lost significant share, moving from 18% in 2019 to 11% in 2021.

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

# The Tesla Model 3 was the most popular car model in 2021

## Most driven car models, 2019-2021

	2019	2020	2021
1	Mercedes Benz C-Class	Volkswagen Passat	Tesla Model 3
2	Ford Focus	Mercedes Benz C-Class	Volkswagen Passat
3	Volkswagen Golf	Mercedes Benz Glc-Class	BMW 3 Series
4	Volkswagen Passat	BMW 3 Series	Mercedes Benz Glc-Class
5	Skoda Octavia	Volkswagen Golf	Peugeot 3008
6	BMW 5 Series	Peugeot 3008	BMW 5 Series
7	BMW 3 Series	Mercedes Benz E-Class	BMW X1
8	Mercedes Benz E-Class	Volkswagen Tiguan	Mercedes Benz E-Class
9	Tesla Model 3	Ford Focus	Volkswagen Tiguan
10	Peugeot 3008	BMW X1	Volkswagen Golf

## Most popular car in 2021:

Tesla Model 3



The **Tesla Model 3** is the most popular car model in 2021.

The **Volkswagen Passat** remains a popular car model with a top 4 position in the last three years.

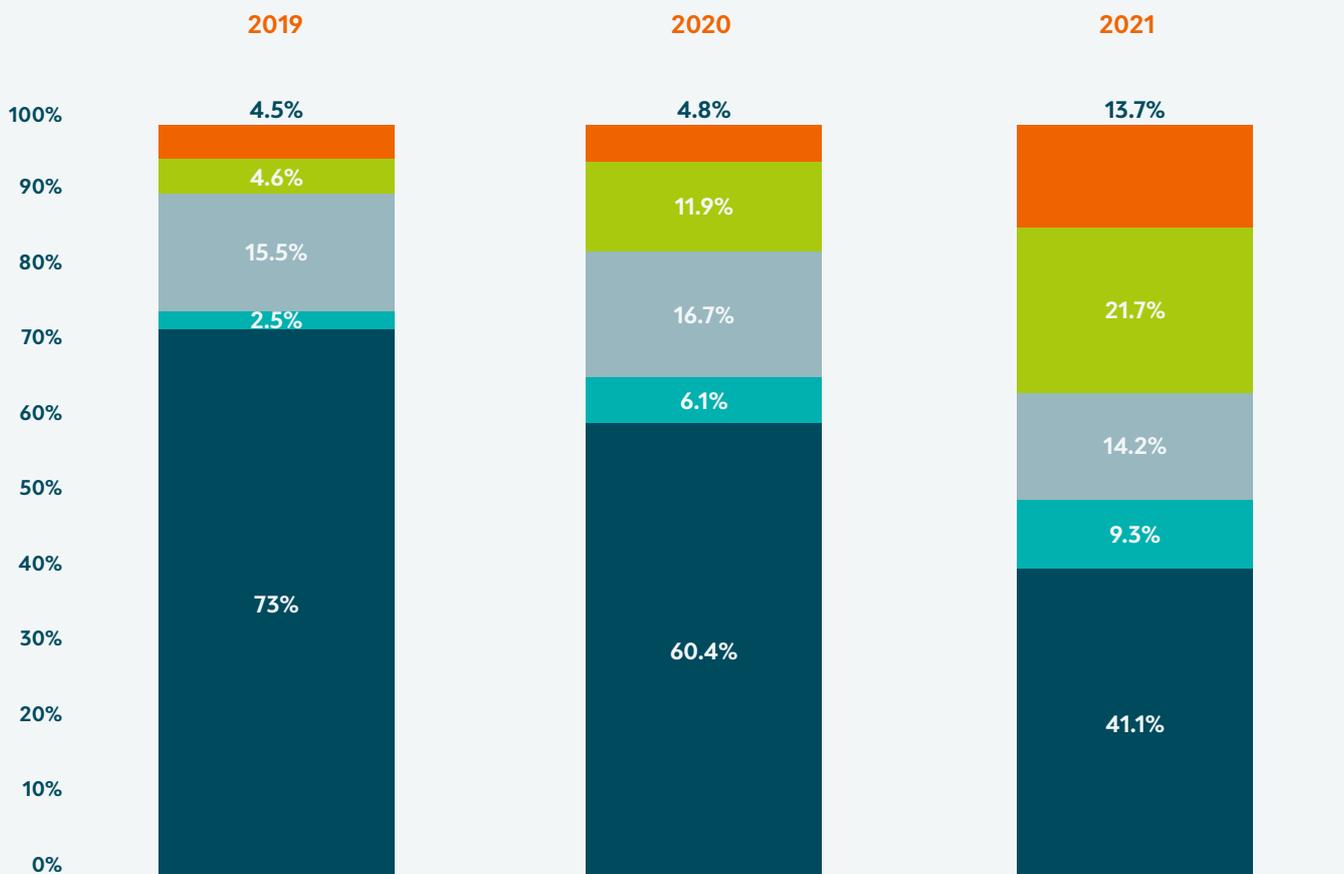
The **Ford Focus** has seen the largest drop in popularity, moving from second place in 2019 to outside the top 10 in 2021.

The **Volkswagen Group & Mercedes Benz** remain dominant, having three and two models respectively in the top 10 in 2021.

# Diesel decreased more than 30% in the past 3 years

## Trends in Powertrains, 2019-2021

● Diesel ● Hybrid ● Petrol ● PHEV ● BEV



Diesel continues to lose in popularity with a decline of **31.9% p.p\***.

The share of PHEV have increased significantly with **17.1% p.p\***. PHEV is now the second most popular fuel type.

Petrol has decreased slightly.

The share of BEV has increased massively as well with **9.2% p.p\***. BEV is now almost as popular as petrol.

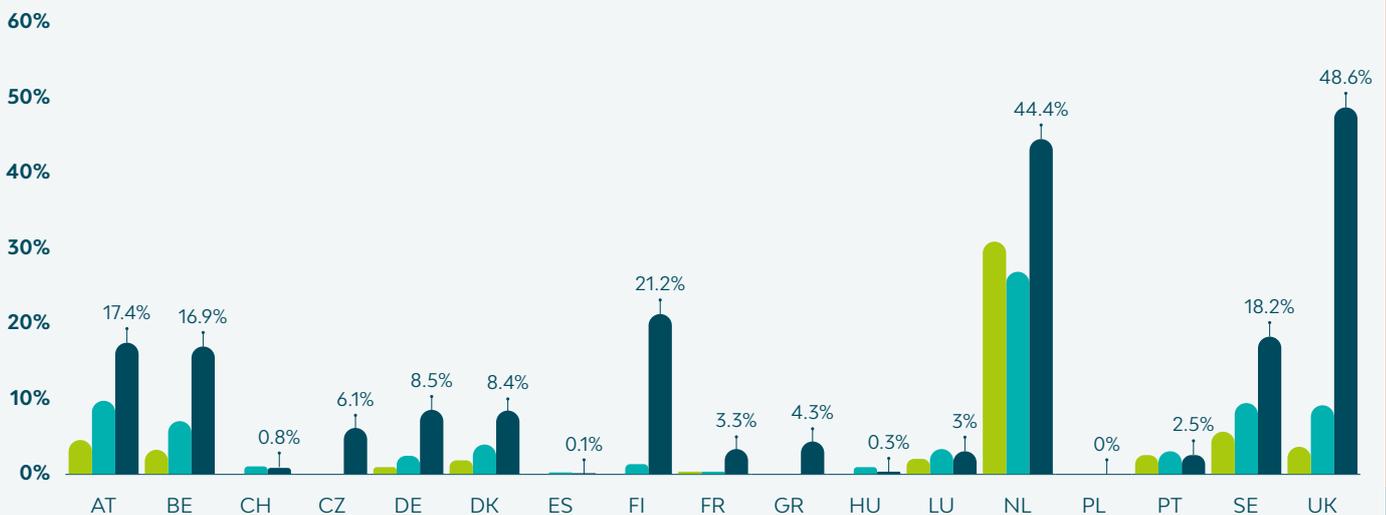
The share of Hybrid has increased with **6.8% p.p\***.

\*P.P = Percentage Points

# Country fuel mix highlighted battery electric vehicles, 2019-2021

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

● 2019 ● 2020 ● 2021



The United Kingdom has surpassed The Netherlands as EV frontrunner with **a share of 48.6% in 2021**.

The United Kingdom has also seen the largest increase in BEV share, **moving from 9.1% in 2019 to 48.6% in 2021**.

In almost all Northern and Western European countries the EV transitioning has accelerated in 2021.

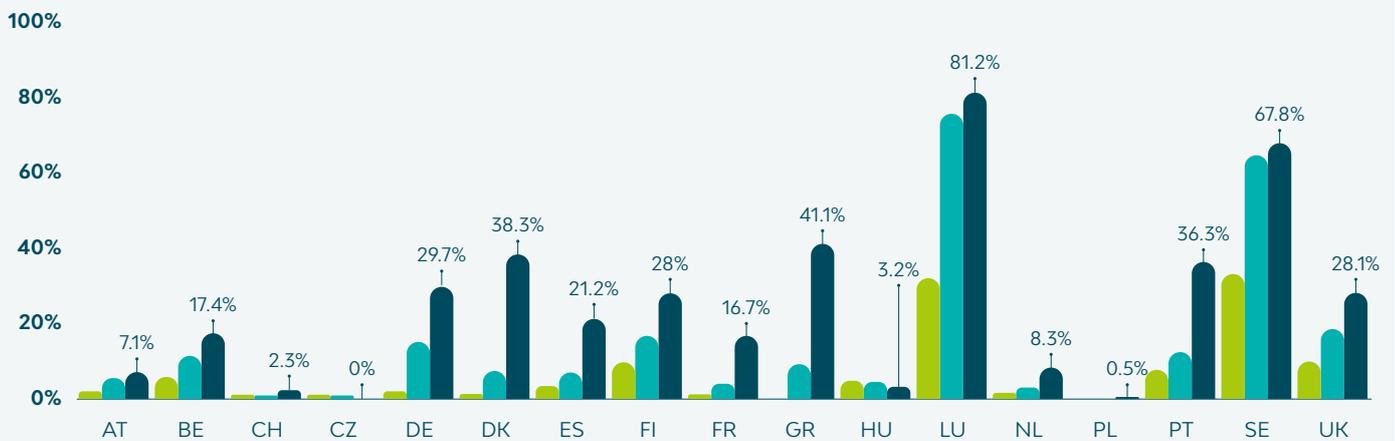
The BEV trend has yet to start in Southern and Eastern Europe.

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

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

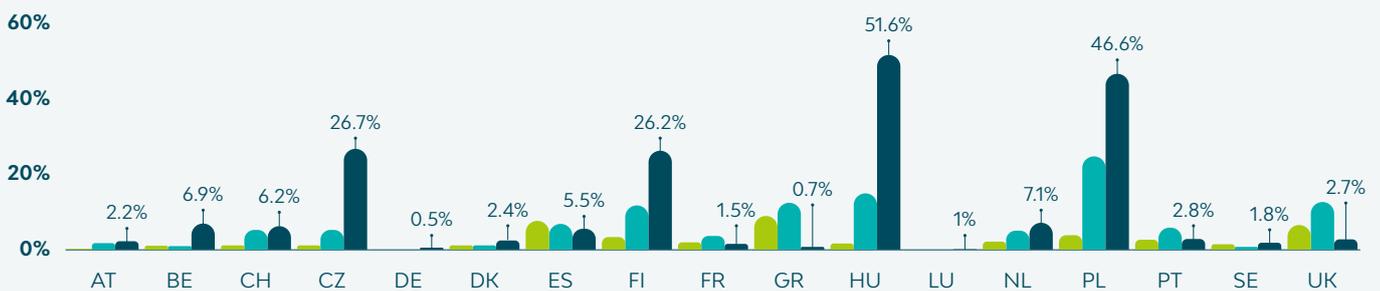
## Share of PHEV per country\*, 2019-2021

● 2019 ● 2020 ● 2021



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

● 2019 ● 2020 ● 2021



Luxembourg has further increased the share of PHEV to **a total of 81.2% in 2021**.

Greece has seen the largest increase in PHEV share, **moving from 0% in 2019 to 41.1% in 2021**.

For hybrids, Hungary has the largest share with **51.6% of all vehicles** in 2021 compared to 1.6% hybrids in 2019.

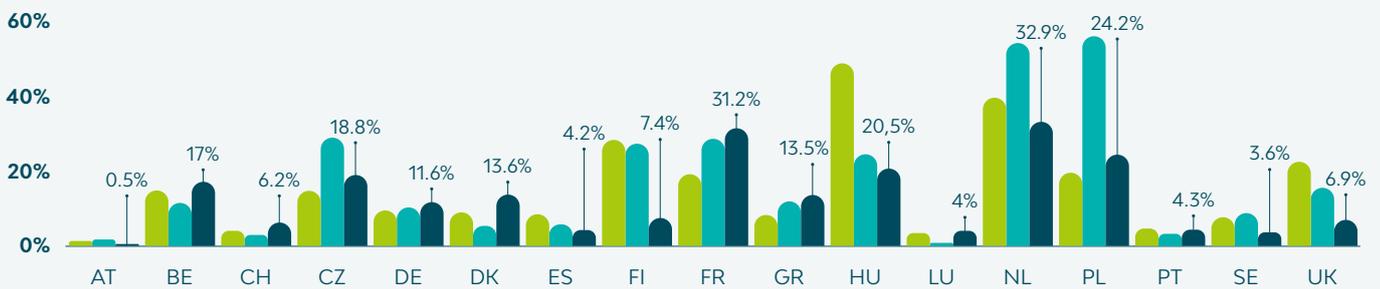
In Poland, hybrid is the most popular fuel type with 46.6%.

\*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

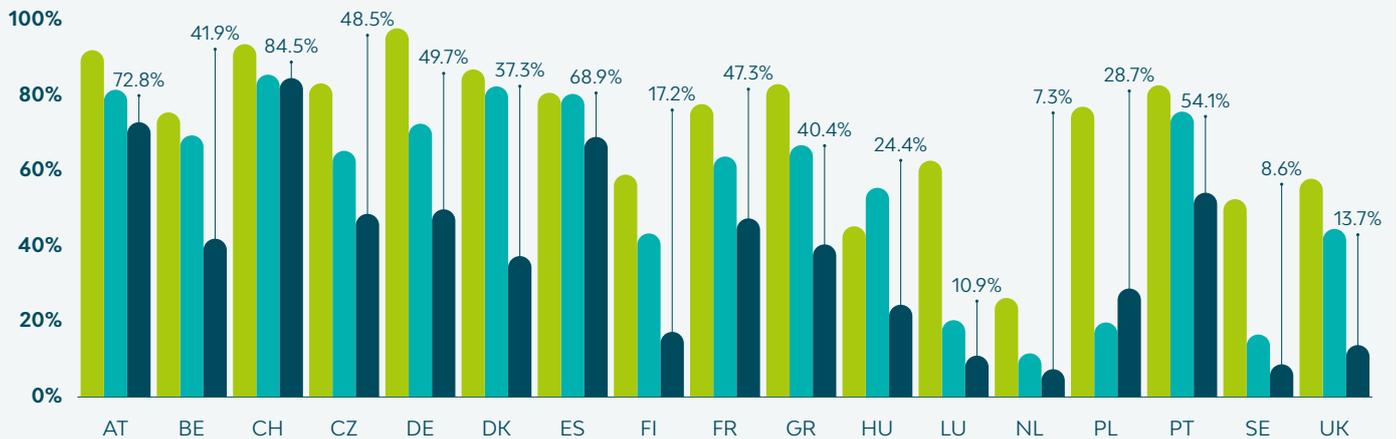
## Share of petrol per country\* 2019-2021

● 2019 ● 2020 ● 2021



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

● 2019 ● 2020 ● 2021



The Netherlands has the largest share of petrol with **32.9% in 2021**, but it did decrease from 53.6% in 2020.

The shift away from diesel is seen in every country, only Poland saw an increase between 2020 and 2021.

The Netherlands has the lowest share of diesel with **only 7.3% in 2021**.

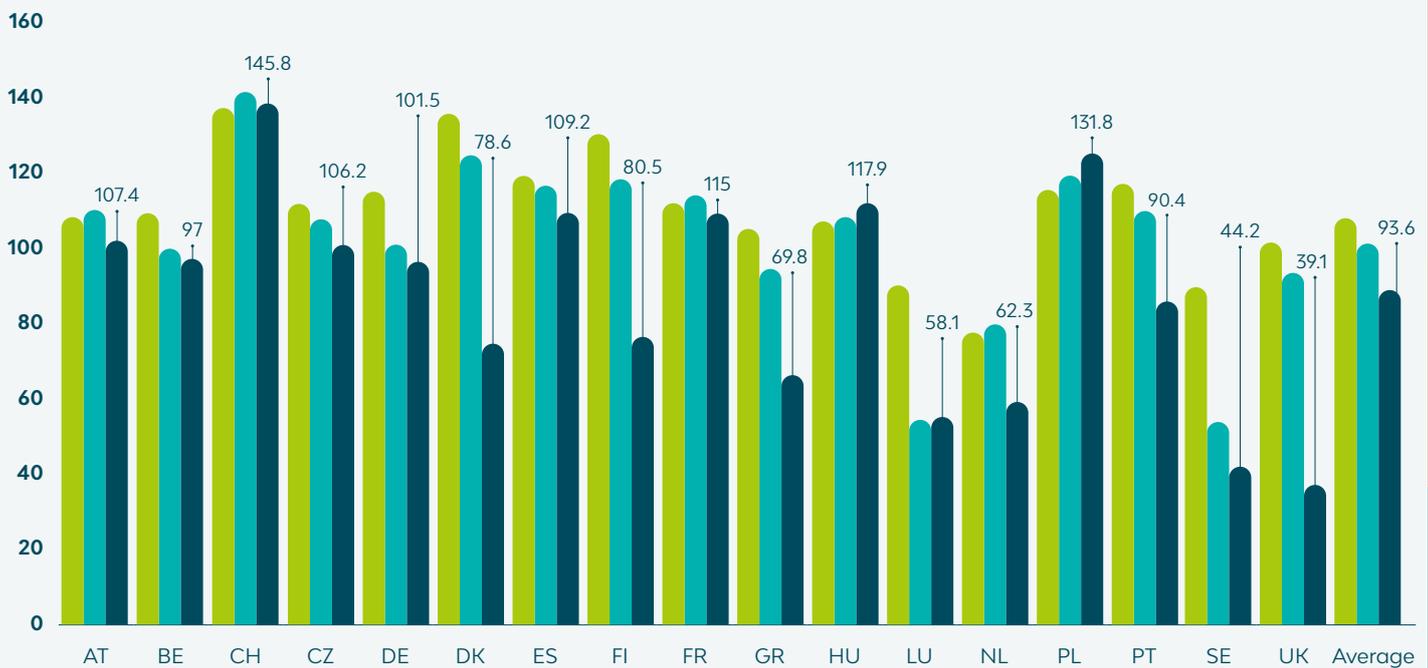
Diesel remains to be the most popular fuel type in Switzerland with **84.5%**.

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

# CO<sub>2</sub> averages\* dropped in almost all countries, except Hungary, Luxembourg and Poland

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

● 2019 ● 2020 ● 2021



The majority of the countries show a decline in average CO<sub>2</sub>, however some countries move much faster than others.

**Switzerland has the highest average CO<sub>2</sub>** (145.8 grams per km), and this has been relatively constant for the last three years.

**The United Kingdom has the lowest average CO<sub>2</sub>** (39.1 grams per km) because of its high BEV adoption.

\*Based on the OEMs reported CO<sub>2</sub>

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

# Conclusion

The D2 segment remains the most popular car segment for the third year in a row in the Technology Industry. The most popular car model is the Tesla Model 3, for the first time a battery electric vehicle.

PHEVs have increased significantly in popularity, with 17.1% now being the second most popular fuel type after diesel.

The switch from diesel to other fuel types is clear with a decrease of 31.9% between 2019 and 2021.

However, there are large differences per country in the pace of moving away from diesel. While in the Netherlands, only 7.3% of vehicles were registered as diesel, while in Switzerland this is still 84.5%.

Due to the large share of BEV registrations in 2021 (48.6%), The United Kingdom has achieved the lowest average CO<sub>2</sub> (31.1 grams per km)\*. While Switzerland has the highest average CO<sub>2</sub> (145.8 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<sub>2</sub> averages



## 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>