



LeasePlan

What's next?

Construction industry benchmark

Fleet trends in the European
construction industry

2018-2020

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Introduction

In this construction industry benchmark report, we highlight the most important fleet trends in Europe by comparing the passenger car registrations between 2018 and 2020.

We applied the following definition of the construction industry:

Companies involved in developing physical buildings/infrastructure or being part of the building/infrastructure-development supply chain.

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 200 passenger cars were renewed within the industry each year (2018, 2019 and 2020).

If you would like to know how sustainable this industry is compared to other industries please check out our [2021 Fleet Sustainability Ranking by Industry](#).

Most driven car segments, 2018-2020*

	2018		2019		2020	
1	B1	25%	C1	31%	C1	25%
2	C1	23%	B1	17%	B1	14%
3	D1	11%	SUV-C1	10%	SUV-C1	12%
4	D2	8%	D1	9%	D1	11%
5	SUV-C1	8%	D2	7%	D2	11%
6	E2	5%	MPV-C	4%	SUV-D2	4%
7	MPV-C	3%	E2	4%	C2	4%
8	SUV-D1	3%	SUV-B1	3%	MPV-C	3%
9	SUV-B1	2%	SUV-D1	3%	SUV-D1	3%
10	SUV-D2	2%	C2	2%	E2	3%

- The **C1 segment** has become the most popular car segment.
- The **SUV trend continues** with an increase from 15% in 2018 to 19% in 2020.
- The **SUV-C1 segment** is the car segment increasing the most, from 8% in 2018 to 12% in 2020.
- The largest decrease in share happened in the **B1 segment**, dropping from 25% in 2018 to 14% in 2020.

Most popular car segment in 2020: C1



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

Most driven car models, 2018-2020

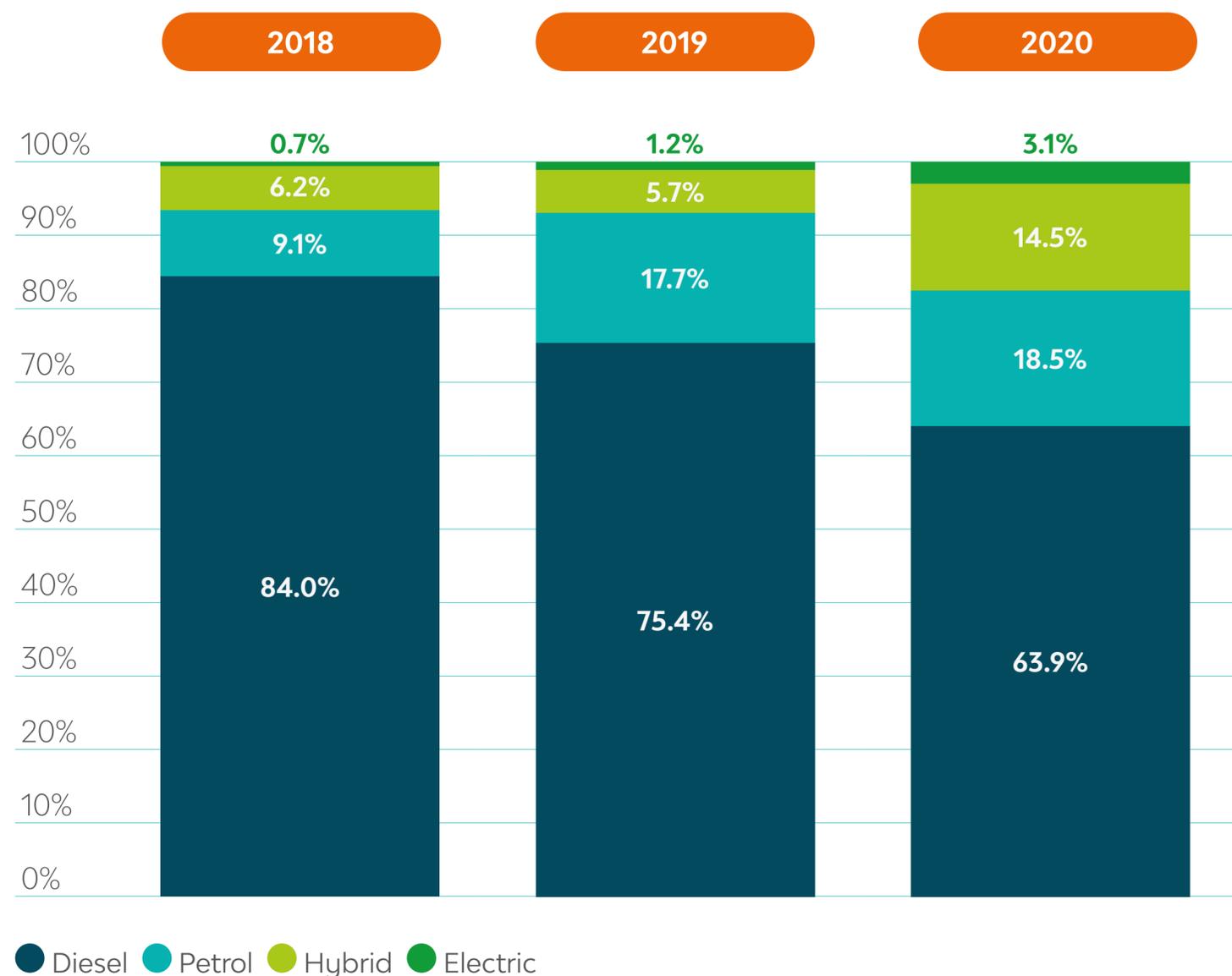
	2018	2019	2020
1	Renault Clio	Peugeot 308	Renault Clio
2	Volkswagen Passat	Renault Clio	Peugeot 308
3	Skoda Octavia	Skoda Octavia	Skoda Octavia
4	Peugeot 308	Peugeot 3008	Volkswagen Passat
5	Opel Astra	Volkswagen Passat	Peugeot 3008
6	Peugeot 3008	Peugeot 208	Toyota Corolla
7	Renault Megane	Seat Leon	Volvo V60
8	Seat Leon	Ford Focus	Ford Focus
9	Audi A4	Citroen C4 Spacetourer	BMW 3 Series
10	Peugeot 208	Renault Megane	Renault Megane

- The **Renault Clio** has remained the most popular vehicle.
- The **Toyota Corolla** increased significantly in popularity, coming in sixth place in 2020 while not visible in the top 10 in 2018.
- The **Volkswagen Group** has dropped in popularity, with only two vehicles in the top 10 in 2020 vs four vehicles in 2018.
- The **Opel Astra** has seen the largest drop in popularity, moving from 5th place in 2018 to dropping out of the top 10 in 2020.

Most popular car in 2020: Skoda Octavia



Powertrain trends, 2018-2020

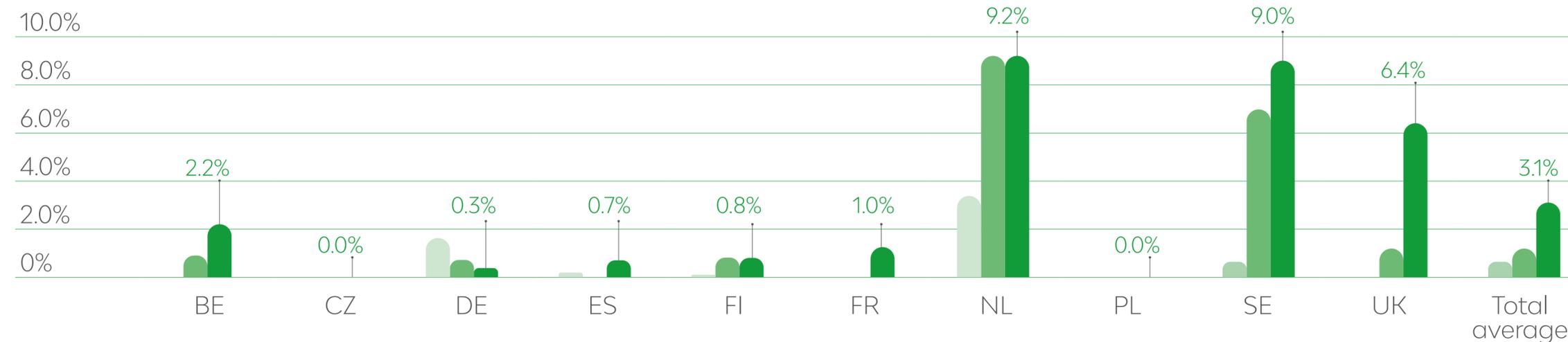


p.p. = percentage points

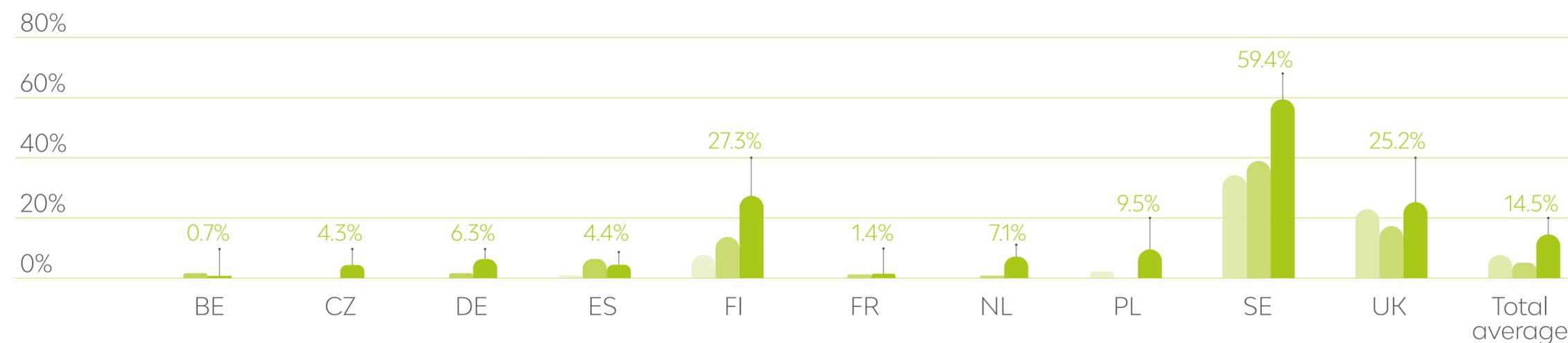
- Given the increasing pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 20.1% p.p.**
- **Petrol has increased by 9.4% p.p.** benefiting from the need for an alternative to diesel.
- After petrol, hybrid has seen the largest **increase with 8.3% p.p.** One explanation could be the need of car manufacturers to sell low-emission vehicles in 2020 in order to avoid heavy fines.
- Lastly, **BEV has increased by 2.4% p.p.** Interestingly, most of the growth has been achieved in 2019 and it has slowed down in 2020.

Share of powertrains per country: battery electric vehicles & hybrids, 2018-2020

Share of BEV per country* ● 2018 ● 2019 ● 2020



Share of hybrid per country* ● 2018 ● 2019 ● 2020

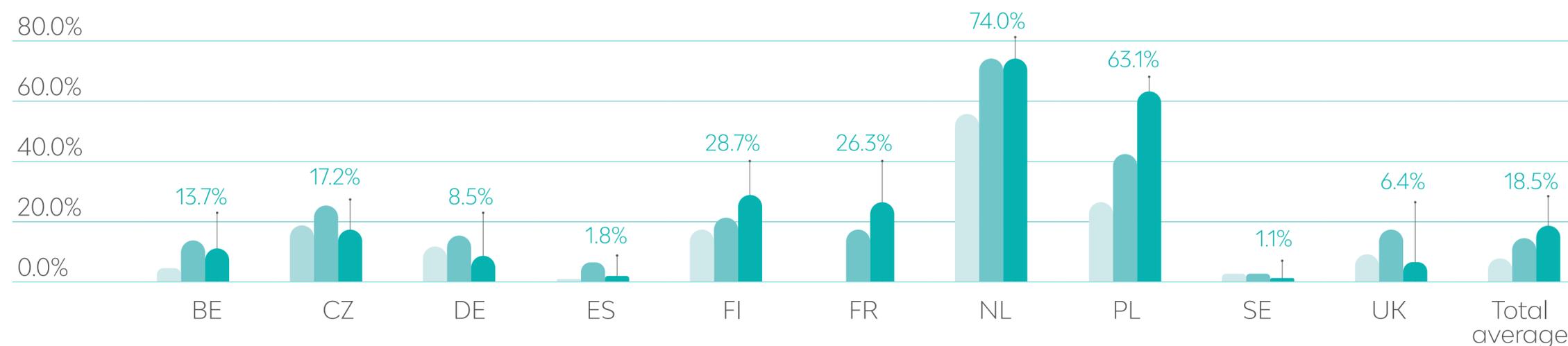


- When it comes to BEVs, The Netherlands has the highest share of **9.2% in 2020**.
- Sweden has seen the largest increase in the past two years **moving from 0.6% to 9.0%**.
- For hybrids, Sweden has the largest share with **59.4% of all vehicles in 2020**.
- A renewed interest for hybrids can be seen across almost all countries.

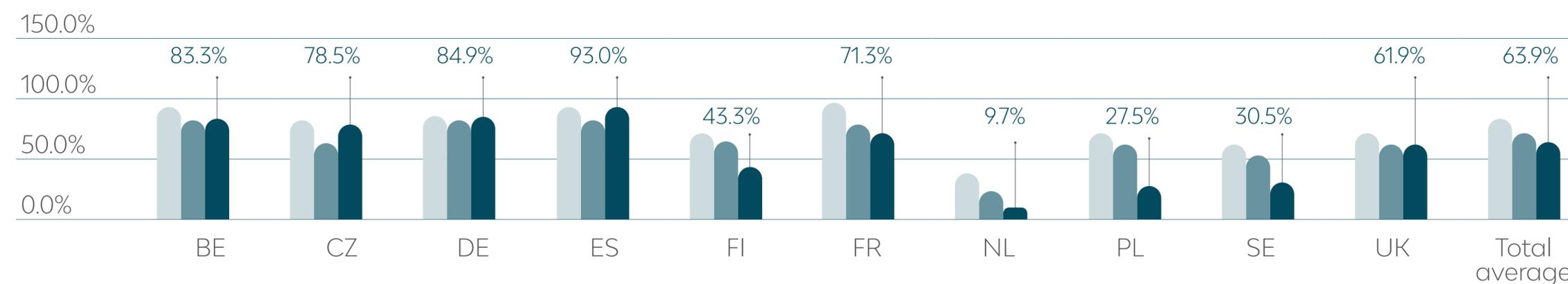
*Only countries with at least 200 renewals each year are shown here to ensure representative statistics

Share of powertrains per country: petrol & diesel, 2018-2020

Share of petrol per country* ● 2018 ● 2019 ● 2020



Share of diesel per country* ● 2018 ● 2019 ● 2020

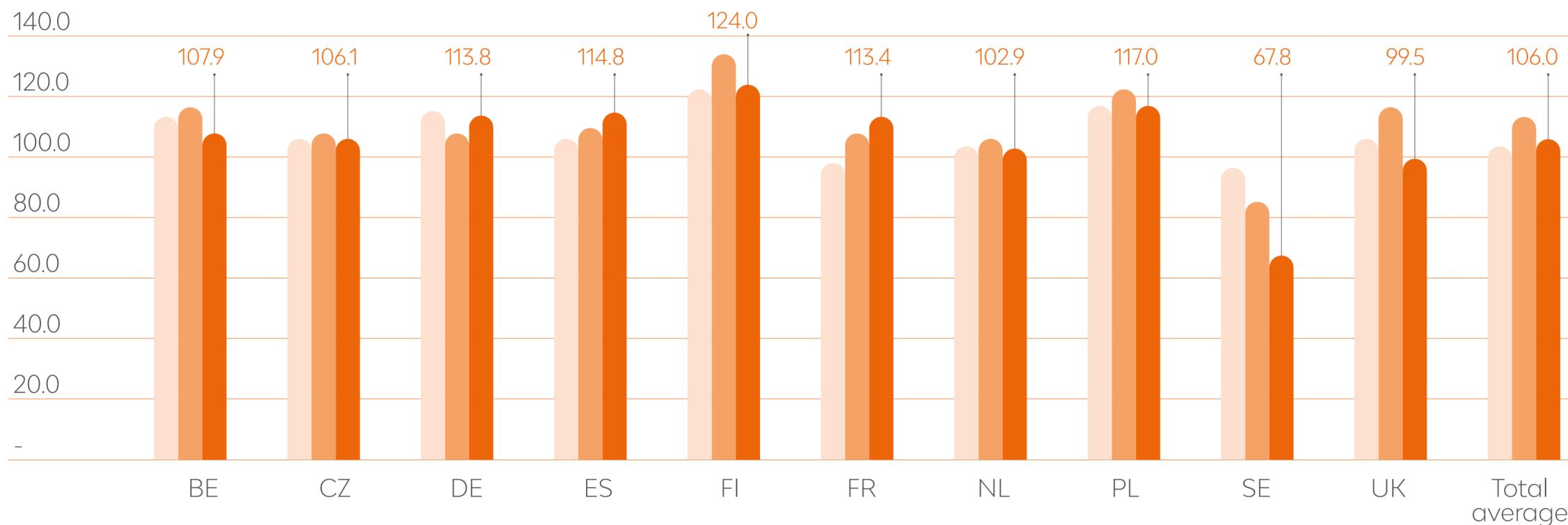


- Diesel is being replaced by petrol in countries like **Finland, France and Poland**.
- The Netherlands has the largest share of petrol: **56.3% in 2020**.
- The shift away from diesel is seen in every country.
- The Netherlands has the lowest share of diesel with **only 9.7% in 2020**.
- Finland has seen the largest drop in diesel, **from 74.5% in 2018 to 43.3% in 2020**.

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

CO₂ averages per country, 2018-2020*

Averages CO₂ per country* ● 2018 ● 2019 ● 2020



- While some countries** saw an increase in CO₂ between 2018 and 2019, this trend is now downward when comparing 2019 to 2020, apart from Germany, Spain, and France.
- **Sweden has the lowest average CO₂** (67.8 grams per km) because of its surge in hybrid & BEV adoption.
- **Finland has the highest average CO₂** (124.0 grams per km), despite having a reasonable share of hybrids (27.3%) in 2020.

*Based on the OEMs reported CO₂

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

Conclusion

- The C1 segment has become the most popular segment in the construction industry, which explains why five C1 segment vehicles are in the top 10 vehicles (Peugeot 308, Skoda Octavia, Toyota Corolla, Ford Focus and Renault Megane).
- The switch from diesel to other powertrains is clear, specifically to petrol (+9.3% p.p.) and hybrids (+8.6% p.p.).
- Furthermore, there are large differences per country in the pace of moving away from diesel. While in The Netherlands only 9.7% of vehicles were registered as diesel, in the case of Spain this is still +93.0%.
- Due to the large share of hybrid (59.4%) and BEV (9.0%) registrations in 2020, Sweden has achieved the lowest average CO₂ (67.8 grams per km)*. Finland has the highest average CO₂ (124.0 grams per km)*.



For more information, please contact your LeasePlan liaison or LeasePlan Consultancy at ics@leaseplan.com.

*Based on the OEMs reported CO₂
p.p. = percentage points

Appendix



Appendix A: overview of car segments

The letter indicates the dimensions of the vehicle with **C** being smaller than **E**
The number indicates the quality level of a brand with **1** being a 'volume brand' and **2** being 'premium brand'

	Volume cars (1)			Premium cars (2)		LCVs
Subcompact cars (B)	Hatchback / sedan / SW  B1 – VW Polo	SUV  SUV-B1 – VW T-Cross	MPV Not common	Hatchback / sedan / SW  B2 – Mini Cooper	SUV 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

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