

LeasePlan

What's next?

Consumer goods industry benchmark

Fleet trends in the European
consumer goods industry

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2018-2020





Contents

Introduction	3
Most driven car segments, 2018-2020	4
Most driven car models, 2018-2020	5
Powertrain trends, 2018-2020	6
Share of powertrain per country, 2018-2020	7
CO ₂ averages per country, 2018-2020	9
Conclusion	10
Appendix A: overview of car segments	11

Introduction

In this Consumer Goods 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 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 have 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	C1	27%	C1	30%	C1	26%
2	D1	15%	D1	11%	SUV-C1	13%
3	B1	14%	SUV-C1	10%	D1	11%
4	D2	8%	D2	10%	B1	9%
5	SUV-C1	7%	B1	8%	D2	9%
6	MPV-C	6%	E2	5%	SUV-D2	5%
7	E2	5%	MPV-C	5%	C2	4%
8	C2	4%	SUV-C2	4%	SUV-B1	4%
9	SUV-D2	3%	C2	4%	MPV-C	4%
10	SUV-D1	3%	SUV-D2	4%	SUV-C2	4%

- The **C1 segment** has remained the most popular car segment.
- **The SUV trend continues** with a doubling of the share in the top 10 (from 13% in 2018 to 26% in 2020).
- The **SUV-C1 segment** is the car segment increasing the most, almost doubling its share to 13%.
- The largest decrease in share happened in the **B1 segment**, dropping from 14% to 9% 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

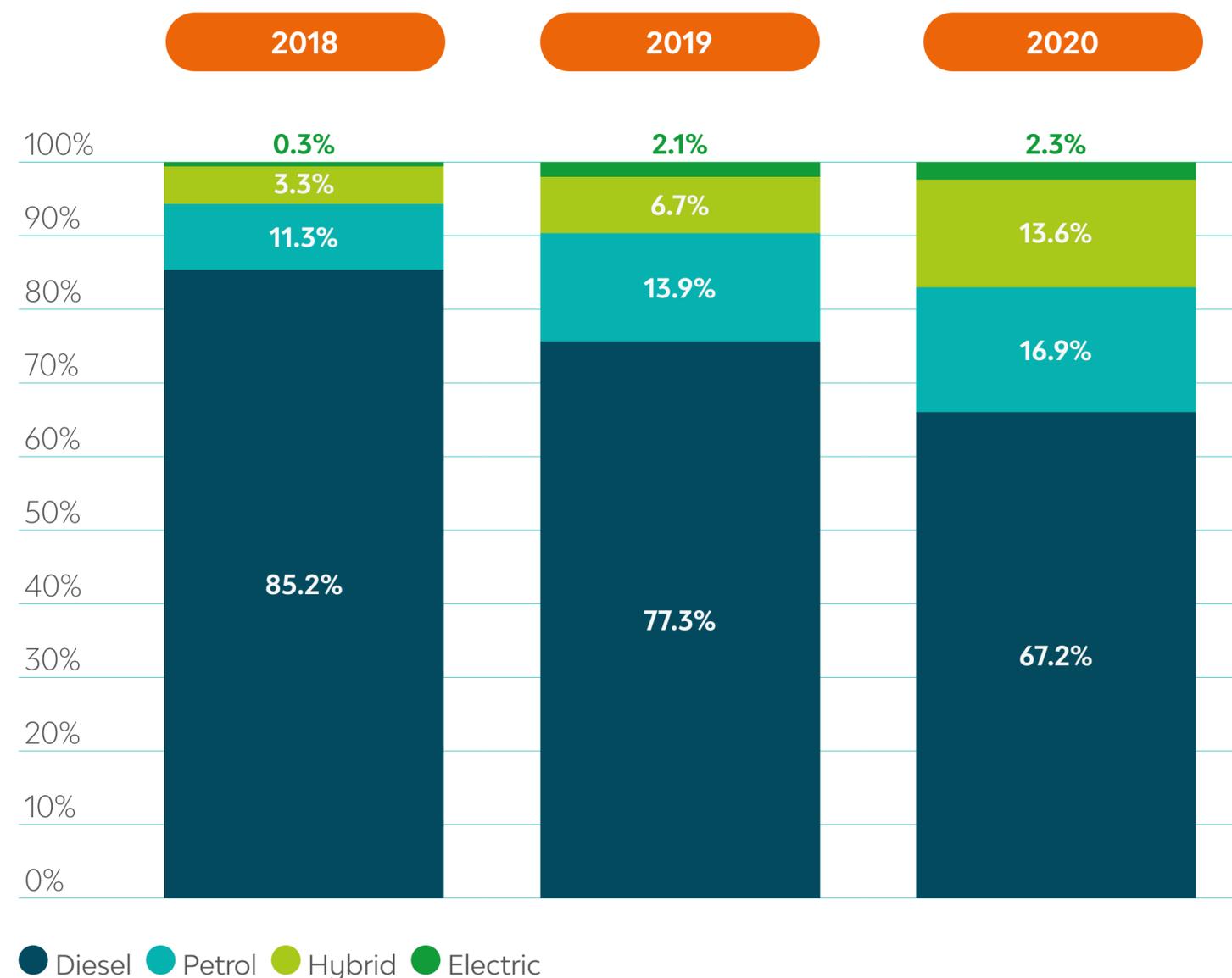
	2018	2019	2020
1	Volkswagen Passat	Skoda Octavia	Skoda Octavia
2	Skoda Octavia	Ford Focus	Toyota Corolla
3	Volkswagen Golf	Volkswagen Passat	Volkswagen Passat
4	Skoda Fabia	Renault Clio	Peugeot 308
5	Ford Focus	Volkswagen Golf	Ford Focus
6	Renault Clio	Peugeot 308	Skoda Fabia
7	Renault Megane	BMW 3 Series	Volkswagen Tiguan
8	Ford Mondeo	Volkswagen Tiguan	Peugeot 3008
9	Nissan Micra	Peugeot 3008	Renault Clio
10	Audi A4	Audi A4	Skoda Superb

- The **Skoda Octavia** has overtaken the Volkswagen Passat as the most popular vehicle.
- The **Toyota Corolla** increased significantly in popularity, coming in second place in 2020 while not visible in the top 10 in 2018.
- The **Volkswagen Golf** has dropped significantly in popularity, moving from third place to not being reflected in the top 10.
- The **Peugeot** car models seem to have increased in popularity, now holding two places in the top ten up from zero.

Most popular car in 2020: Skoda Octavia



Powertrain trends, 2018-2020

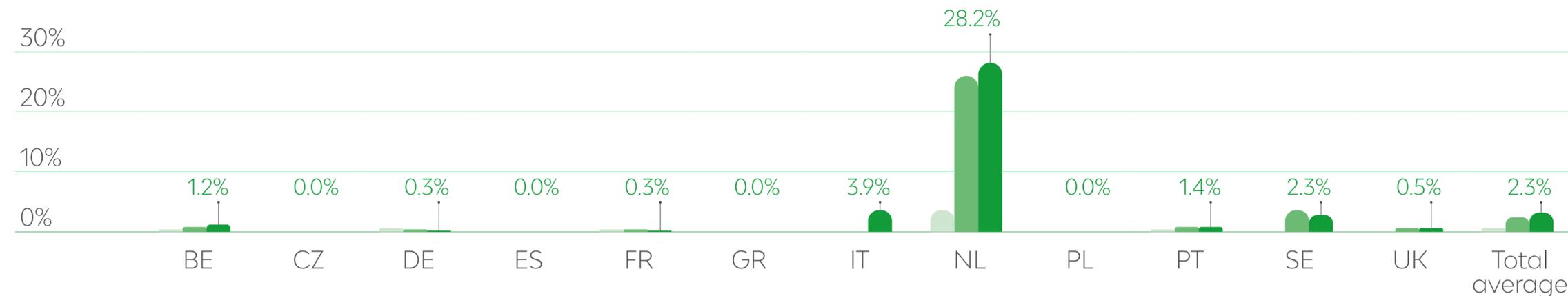


p.p. = percentage points

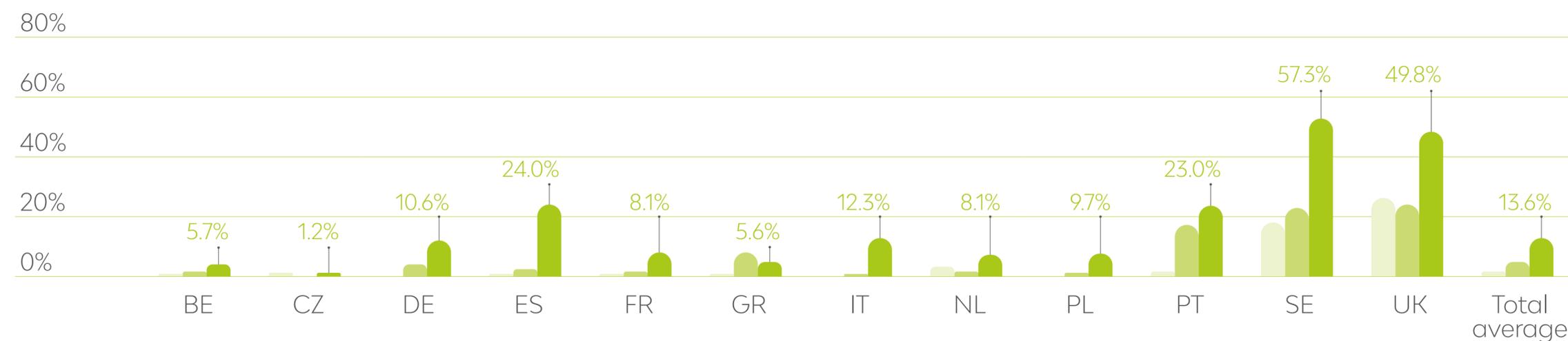
- Given the increasing sustainable pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 18.0% p.p.**
- **Petrol has increased by 5.6% p.p.** benefiting from the need for an alternative to diesel.
- Hybrid has seen the largest **increase with 10.3% p.p.** One explanation could be the need of car manufacturers to sell low-emission vehicles in 2020 in order to avoid heavy fines.
- Lastly, **electric has increased by 2% p.p.** (only full electric vehicles are included here). Interestingly, most of the growth has been achieved in 2019 and growth has actually slowed down in 2020.

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

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



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

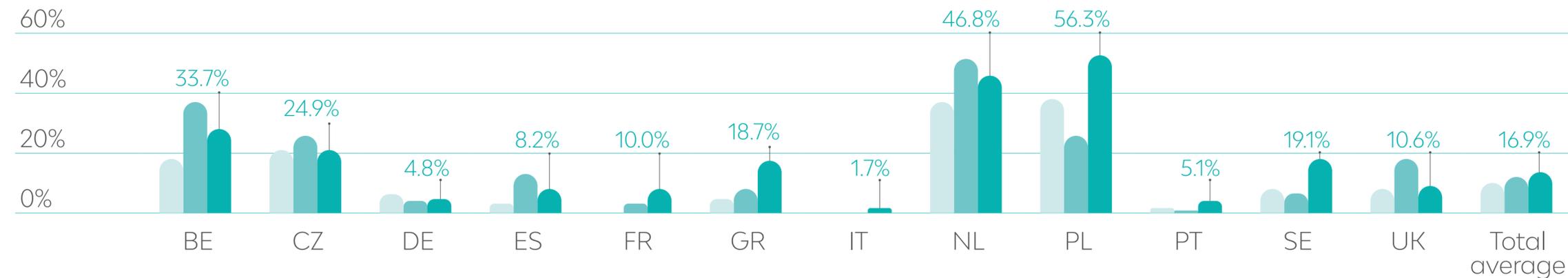


- When it comes to BEVs, The Netherlands is ahead of all countries with a **share of 28.2% in 2020.**
- Italy has seen the largest increase in the past two years **moving from 0% to 3.9%.**
- For hybrids, Sweden has the largest share with **57.3% of all vehicles in 2020.**
- The UK is a close second with approximately **50% of all vehicles being hybrid.**
- A renewed interest for hybrids can be seen across almost all countries.

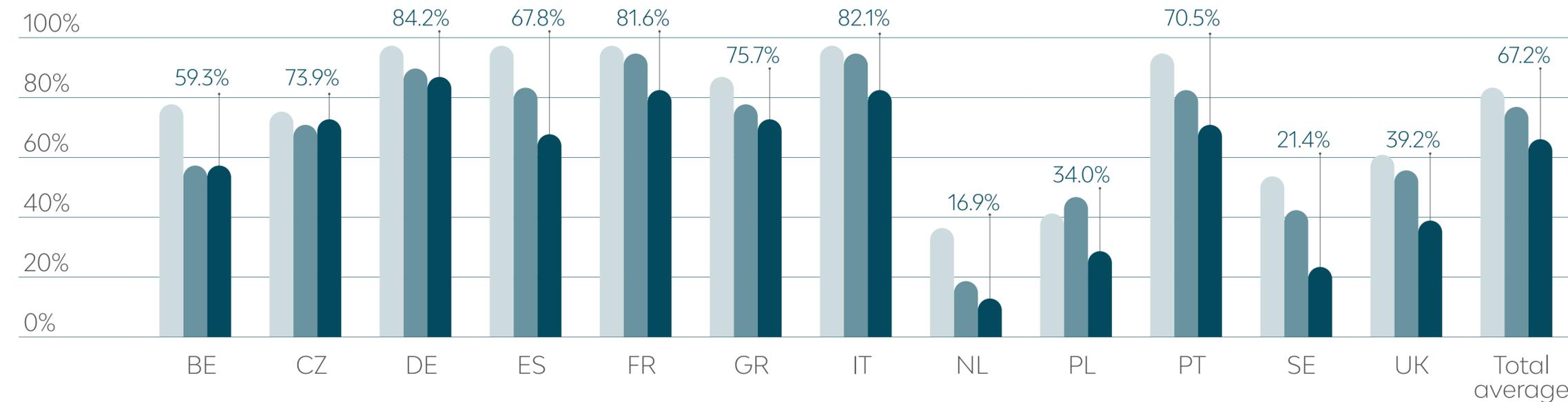
*Only countries with at least 200 renewals each year are shown here to ensure representative statistics

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

Share of petrol per country* 2018 2019 2020



Share of diesel per country* 2018 2019 2020

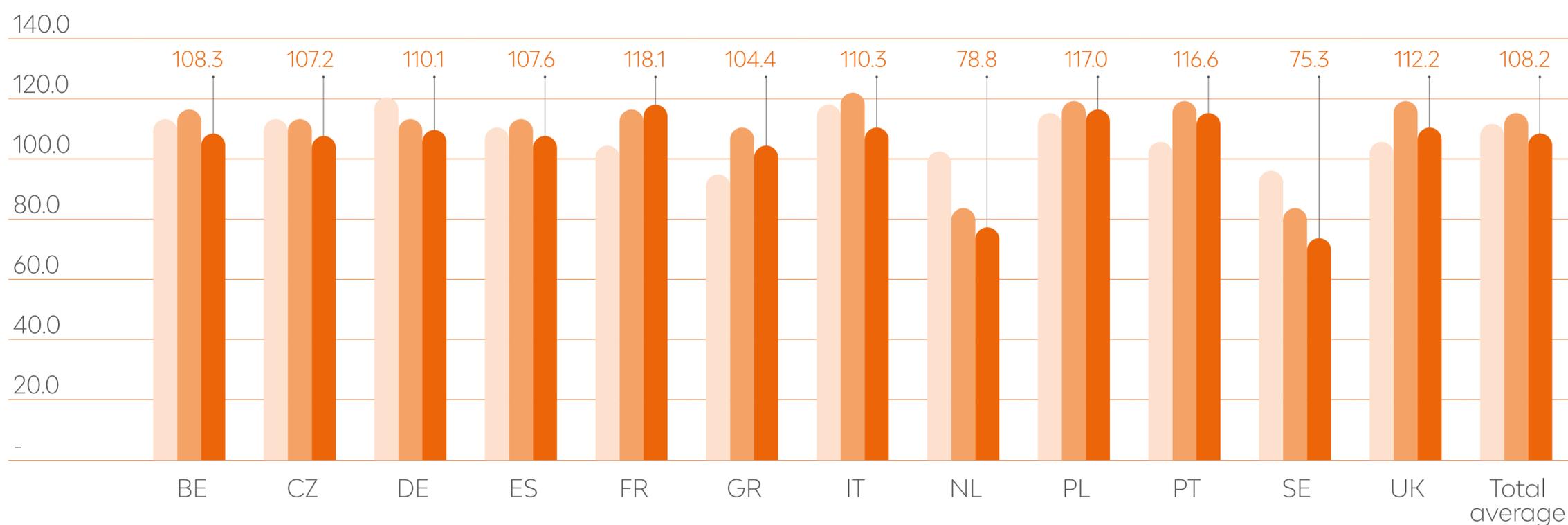


- Diesel is being replaced by petrol in countries like **France, Greece, Poland, Portugal and Sweden.**
- Poland has the largest share of petrol: **56.3% in 2020.**
- The shift away from diesel is seen in every country.
- The Netherlands has the lowest share of diesel with **only 16.9% in 2020.**
- Sweden has seen the largest drop in diesel, **moving from 75.1% to 21.4% 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 many countries saw an increase in CO₂ between 2018 and 2019, this trend is now downward when comparing 2019 to 2020.
- **Sweden has the lowest average CO₂** (75.3 grams per km) because of its surge in hybrid adoption.
- **France has the highest average CO₂** (118.1 grams per km) and is also one of the few countries showing an increase in CO₂ each year.

*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 still leads the way in the Consumer Goods industry, which explains why two C1 segment vehicles (the Skoda Octavia & Toyota Corolla) have taken the top two spots of most registered vehicle models.
- As for fuel types, the switch from diesel to other fuel types is clear, specifically to hybrid vehicles with an increase of +10.3% p.p..
- Furthermore, there are large differences per country in the pace of moving away from diesel. While in The Netherlands only 16.8% of vehicles were registered as diesel, in the case of France, Germany & Italy this is still +80%.
- Due to the large share of hybrid registrations in 2020 (57.3%), Sweden has achieved the lowest average CO₂ (75.3 grams per km)*. Given its low adoption of BEVs and hybrid vehicles, France has the highest average CO₂ (118.1 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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