



LeasePlan

What's next?

Healthcare & pharma industry benchmark

Fleet trends in the European
healthcare and pharma industry



2018-2020

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Introduction

In this healthcare & pharma 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 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 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	C1	20%	C1	18%	C1	24%
2	D2	16%	D2	17%	D1	14%
3	D1	14%	D1	12%	D2	13%
4	SUV-C1	11%	SUV-C1	12%	SUV-C1	11%
5	E2	8%	E2	8%	SUV-D2	6%
6	C2	8%	SUV-C2	7%	E2	6%
7	SUV-D2	6%	SUV-D2	6%	SUV-C2	5%
8	SUV-C2	5%	C2	6%	C2	5%
9	MPV-C	4%	SUV-D1	4%	SUV-B1	4%
10	SUV-D1	2%	MPV-C	3%	SUV-D1	3%

- The **C1 segment** has remained the most popular car segment, increasing its share from 20% in 2018 to 24% in 2020.
- **The SUV trend continues** with a significant increase in its share in the top 10 (from 24% in 2018 to 29% in 2020).
- **Regular premium segments (D2, E2 and C2) have lost share**, from 32% in 2018 to only 24% 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

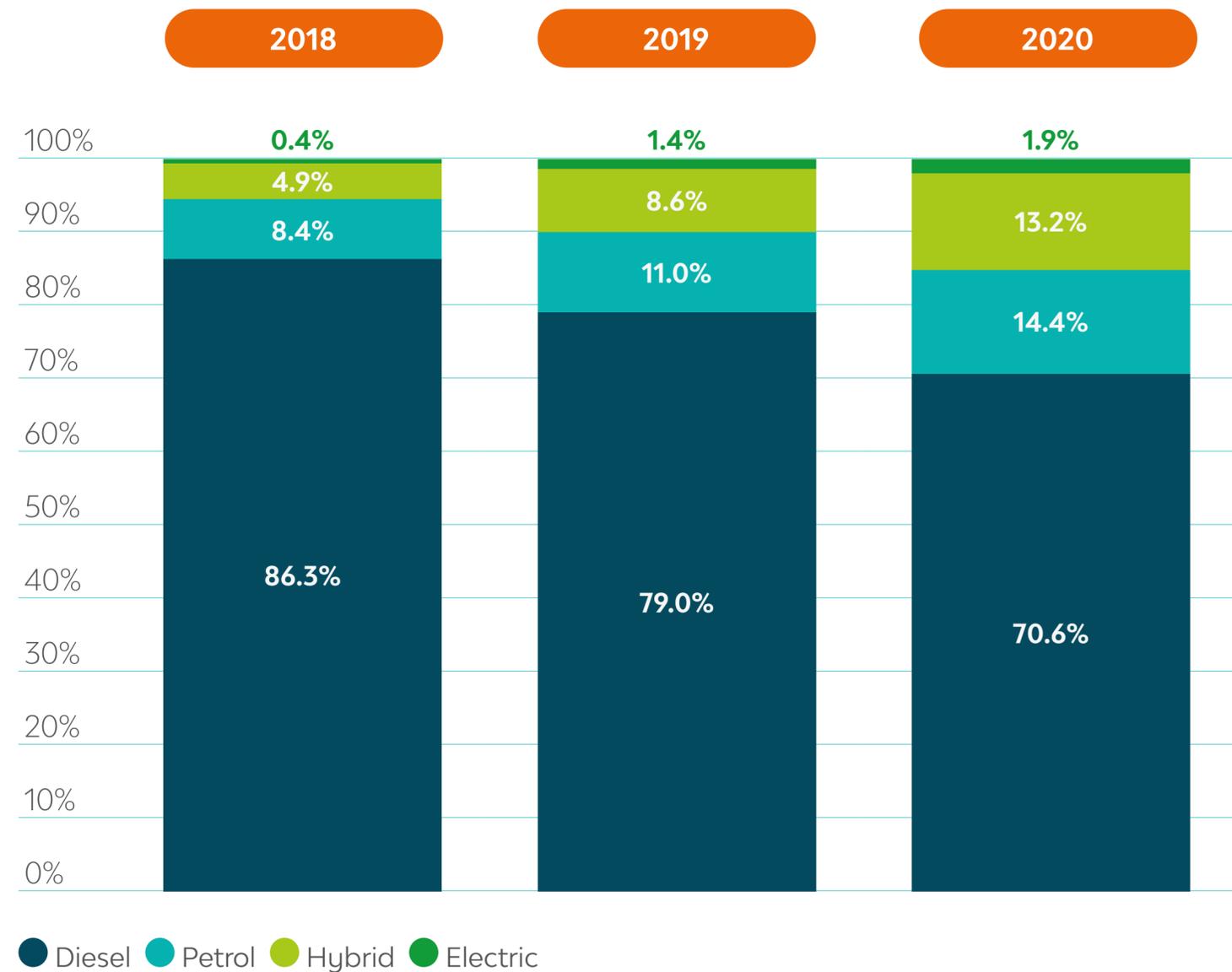
	2018	2019	2020
1	Volkswagen Passat	Volkswagen Passat	Volkswagen Passat
2	Volkswagen Golf	Volkswagen Golf	Volkswagen Golf
3	BMW 3 Series	Skoda Octavia	Toyota Corolla
4	Skoda Octavia	Audi A4	Skoda Octavia
5	Volkswagen Tiguan	Peugeot 3008	BMW 3 Series
6	Audi A4	Mercedes Benz C-Class	Volkswagen Tiguan
7	BMW 5 Series	Volkswagen Tiguan	Ford Focus
8	BMW X1	BMW 3 Series	Peugeot 3008
9	Ford Focus	BMW 5 Series	Volkswagen T-Roc
10	BMW 1 Series	Toyota Corolla	Renault Megane

- The **Volkswagen Passat** has remained the most popular car model.
- The **Toyota Corolla** saw its popularity increase the most, moving from outside the top 10 in 2018 to third place in 2020.
- **BMW** has lost significant share in the top 10 with only one vehicle in 2020 vs four vehicles in 2018.
- The **Volkswagen group** remains popular with five vehicles in the top 10.

Most popular car in 2020: Volkswagen Passat



Powertrain trends, 2018-2020

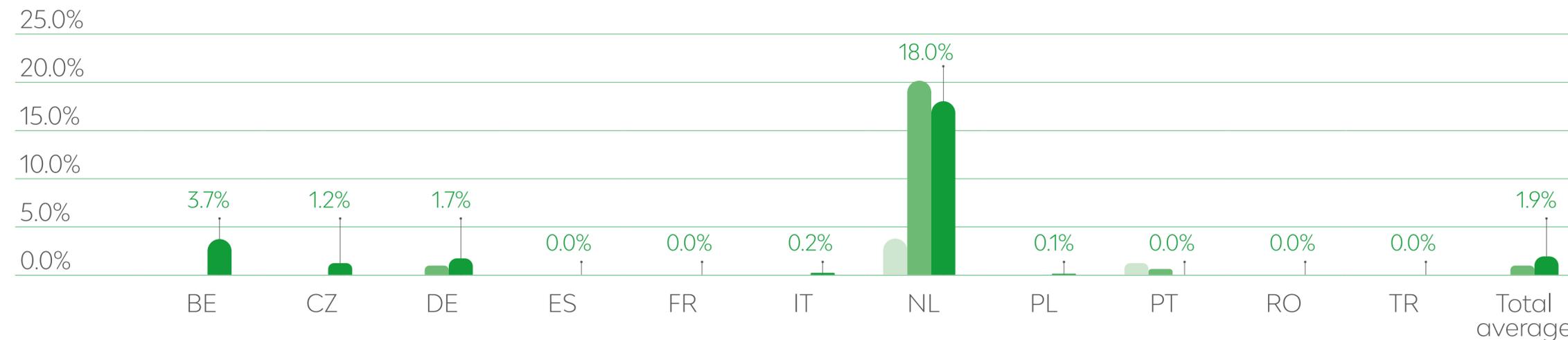


p.p. = percentage points

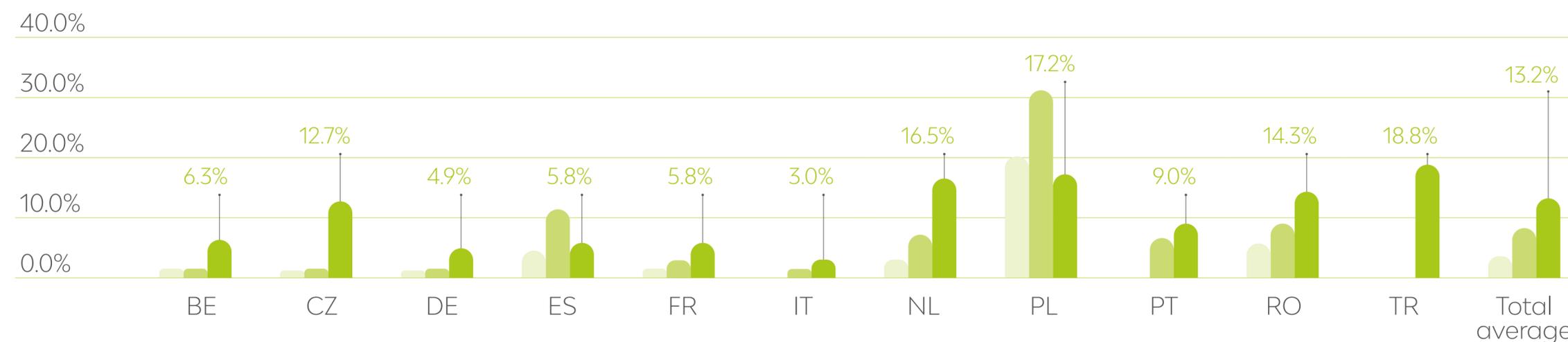
- Given the increasing sustainable pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 15.7% p.p.**
- **Petrol has increased by 6.0% p.p.** benefiting from the need for an alternative to diesel.
- Hybrid has seen an **increase of 8.3% p.p.** more than doubling its share from 2018.
- Lastly, the **battery electric vehicle (BEV) share has increased by 1.5% p.p.**

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

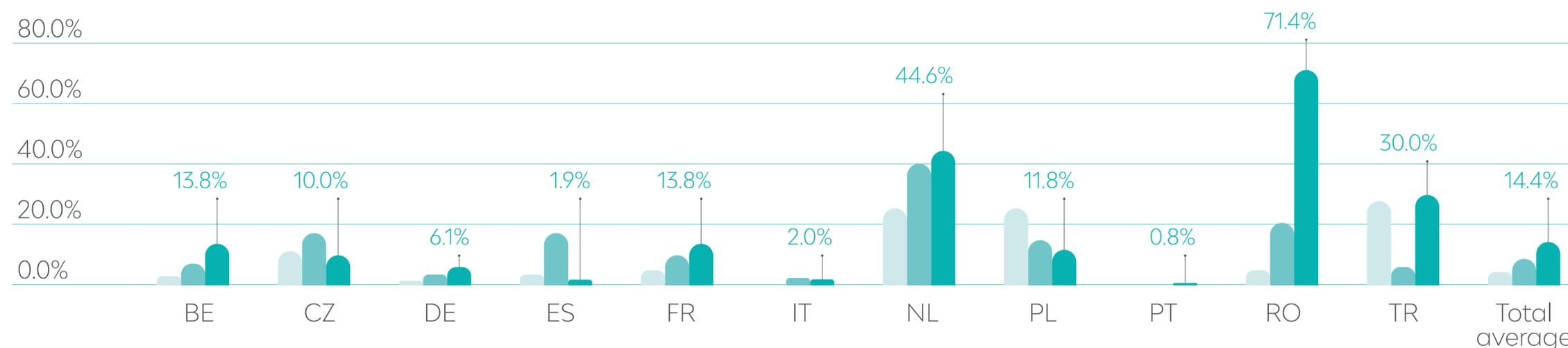


- When it comes to BEVs, The Netherlands is ahead of all countries with a **share of 18.0% in 2020**, but this is a decrease when comparing to 2019.
- Belgium has seen the largest increase in BEV share, **moving from 0% to 3.7%**.
- For hybrids, Turkey has the largest share with **18.8% of all vehicles** in 2020, a significant increase from 0% in 2018.
- A renewed interest for hybrids can be seen across almost all countries.

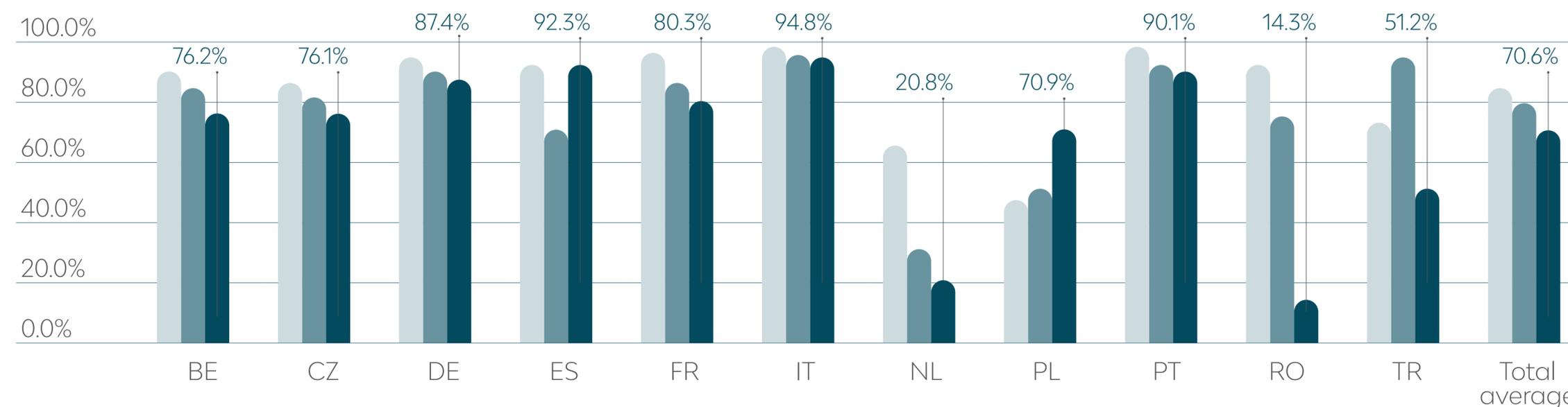
*Only countries with at least 200 renewals each year are shown here to ensure representative statistics

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

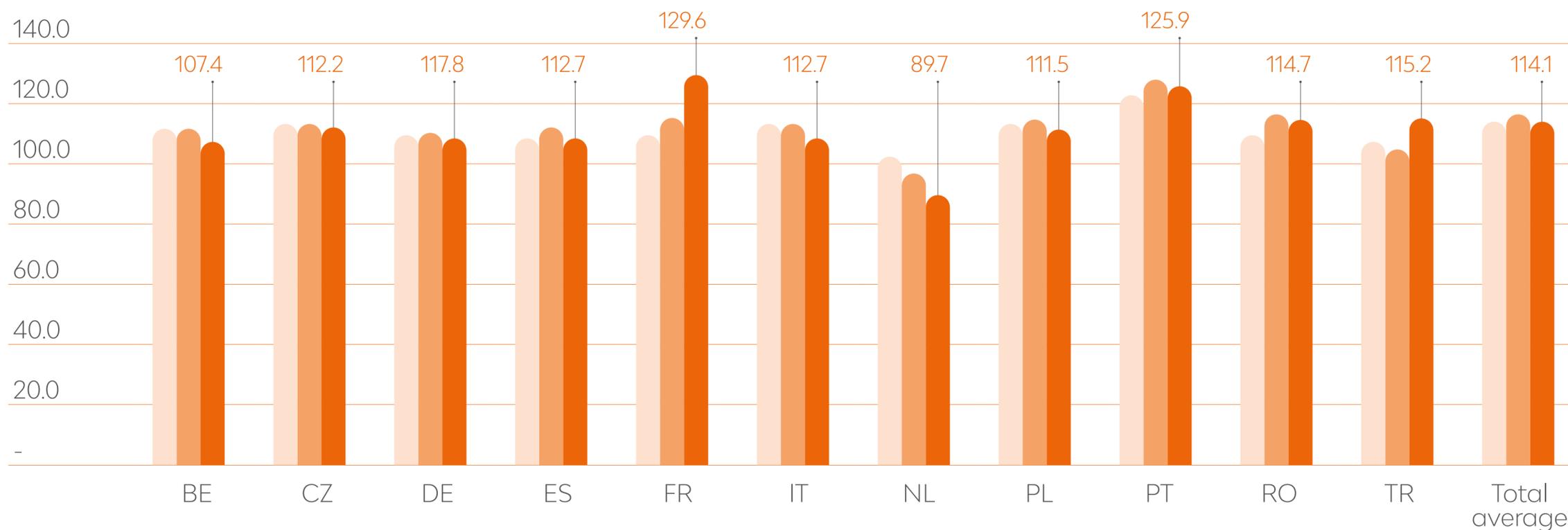


- Diesel is being replaced by petrol in countries like **Belgium, Germany, France, The Netherlands and Romania**.
- Romania has the largest share of petrol: **71.4% in 2020**.
- The shift away from diesel is seen in every country.
- Romania has the lowest share of diesel with **only 14.3% in 2020**.
- Romania has also seen the largest drop in diesel, **moving from 90.5% in 2018 to 14.3% 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 many countries** saw an increase in CO₂ between 2018 and 2019, this trend is now downward when comparing 2019 to 2020.
- **The Netherlands has the lowest average CO₂** (89.7 grams per km) because of its surge in EV adoption.
- **France has the highest average CO₂** (129.6 grams per km) which is significantly up compared to 2018 (112.8 grams per km).

*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 remained the most popular segment in the healthcare & pharma industry, which explains why three of the top four popular car models are from the C1 segment (the Volkswagen Golf, the Toyota Corolla and the Skoda Octavia).
- The switch from diesel to other powertrains is clear, with petrol, hybrid and BEV all gaining significantly larger shares (+6.0% p.p., +8.3% p.p. and +1.5% p.p. respectively).
- However, there are large differences per country in the pace of moving away from diesel. While in Romania only 14.3% of vehicles were registered as diesel, in the case of Spain, Italy and Portugal this is still +90%.
- Due to the large share of BEV registrations in 2020 (18.0%), The Netherlands has achieved the lowest average CO₂ (89.3 grams per km)*, while France has the highest (129.6 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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