

The LeasePlan logo is displayed in white text on a dark teal background. The background features a large, stylized graphic of three overlapping, upward-pointing chevrons in shades of orange and red. The word "LeasePlan" is written in a clean, sans-serif font, with "Lease" and "Plan" connected.

What's next?

Industrial industry benchmark

Fleet trends in the European
industrial industry

2018-2020



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Introduction

In this industrial 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 industrial industry:

Companies producing or maintaining physical material or products for the B2B sector.

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	26%	C1	22%	C1	22%
2	D1	19%	D1	16%	D1	16%
3	D2	10%	D2	13%	D2	13%
4	E2	8%	SUV-C1	12%	SUV-C1	13%
5	SUV-C1	8%	E2	7%	SUV-D2	6%
6	SUV-D2	5%	SUV-D2	5%	E2	5%
7	B1	4%	C2	4%	SUV-C2	4%
8	MPV-C	4%	MPV-C	4%	C2	4%
9	SUV-D1	4%	SUV-D1	4%	SUV-D1	4%
10	C2	3%	B1	4%	MPV-C	3%

- The **C1 segment** has remained the most popular car segment, although its share has decreased from 26% in 2018 to 22% in 2020.
- **The SUV trend continues** with a significant increase in its share in the top 10 (from 17% in 2018 to 27% in 2020).
- **The regular volume segments (B1, C1 and D1) have lost share** in the top 10 from 49% in 2018 to 38% 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

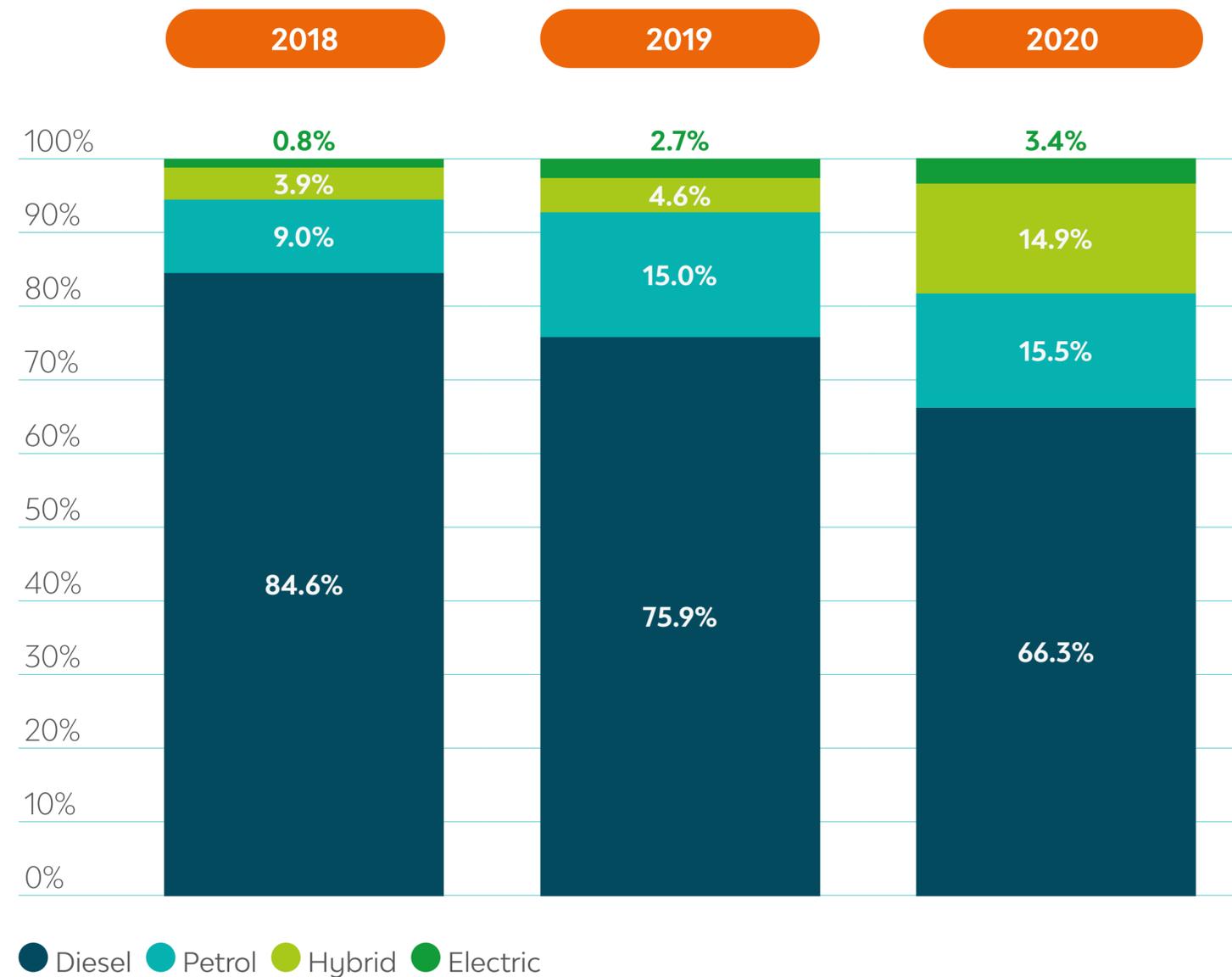
	2018	2019	2020
1	Volkswagen Passat	Volkswagen Passat	Volkswagen Passat
2	Skoda Octavia	Skoda Octavia	Skoda Octavia
3	Volkswagen Golf	Volkswagen Golf	Peugeot 3008
4	Renault Megane	Renault Megane	Skoda Superb
5	Skoda Superb	Skoda Superb	Seat Leon
6	Audi A4	Peugeot 3008	Ford Focus
7	Volvo V90	Audi A4	Volvo V60
8	Opel Astra	Volkswagen Tiguan	BMW 3 Series
9	Peugeot 3008	Volvo V60	Audi A4
10	Peugeot 308	Volvo Xc60	Volkswagen Tiguan

- The **Volkswagen Passat** has remained the most popular car model.
- The **Peugeot 3008** saw its popularity increase the most, moving from ninth place in 2018 to third place in 2020.
- The **Volkswagen Golf** has seen the largest drop in popularity, moving from third place in 2018 to being outside the top 10 in 2020.
- The **Volkswagen group** remains popular with six vehicles in the top 10.

Most popular car in 2020: Volkswagen Passat



Powertrain trends, 2018-2020

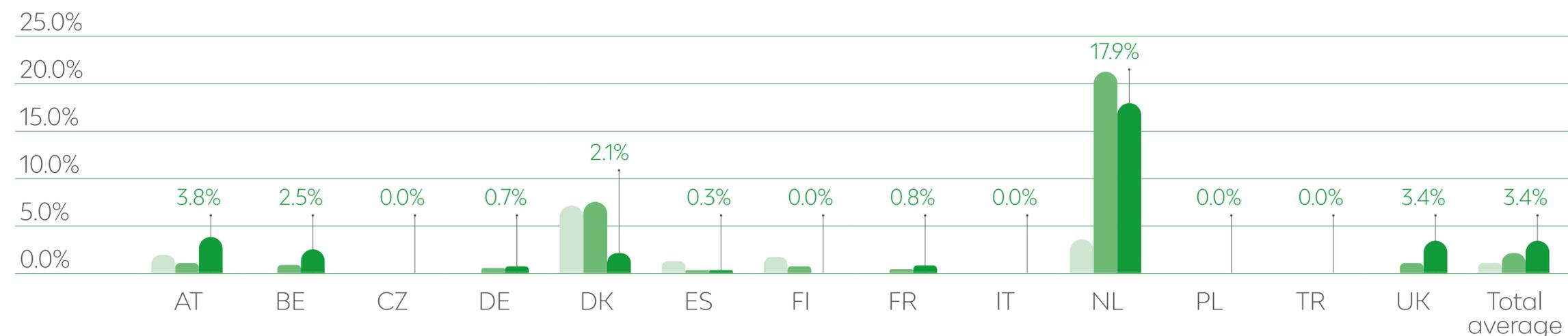


p.p. = percentage points

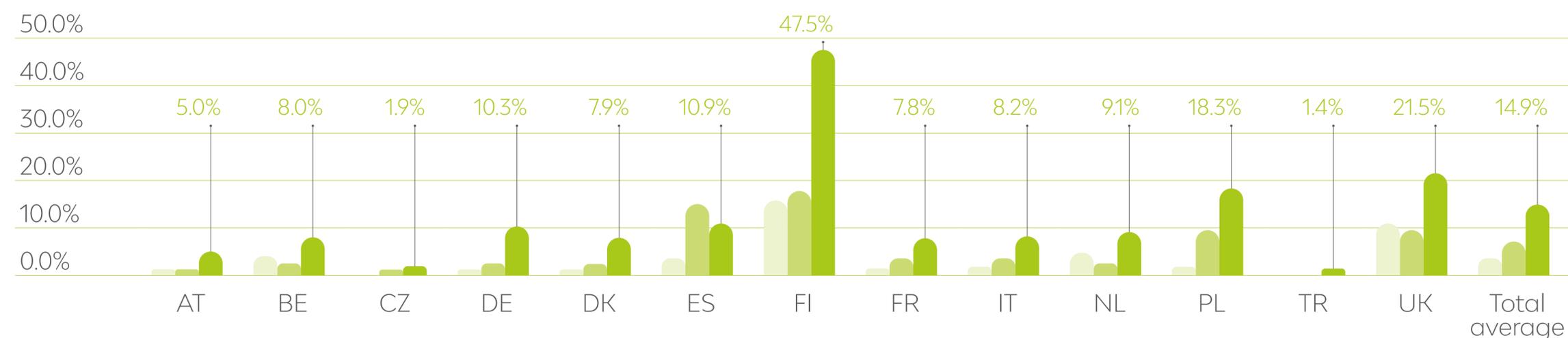
- Given the increasing pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 20.1% p.p.**
- **Petrol has increased by 6.5% p.p.** benefiting from the need for an alternative to diesel.
- Hybrid has seen an **increase of 11.0% p.p.** almost tripling its share from 2018.
- Lastly, **the battery electric vehicle (BEV) has increased by 2.6% p.p.** (only full BEVs are included here).

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

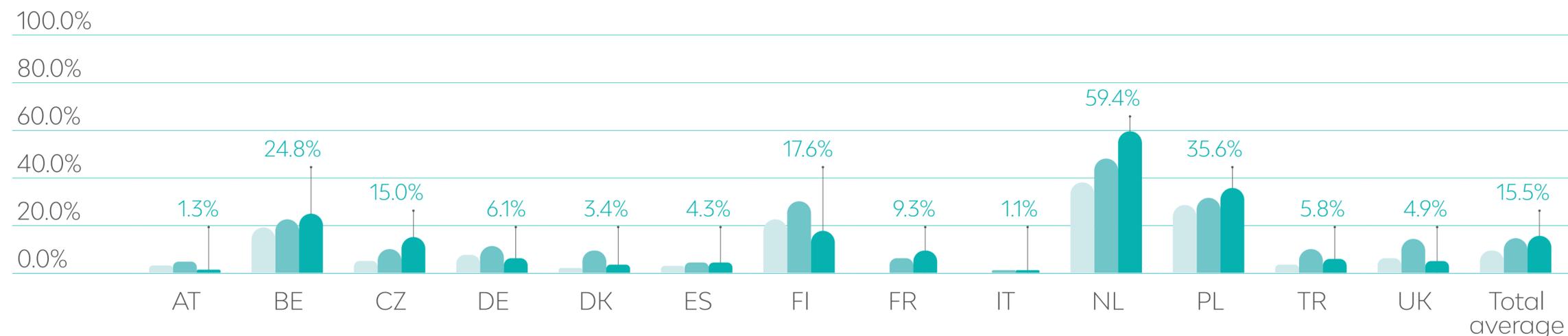


- When it comes to BEVs, The Netherlands is ahead of all countries with **a share of 17.9% in 2020**, but this is a decrease when compared to 2019.
- The Netherlands has also seen the largest increase in BEV share **from 4.0% to 17.9%**.
- For hybrids, Finland has the largest share with **47.5% of all vehicles** in 2020 compared to its share of 16.3% in 2018.
- A renewed interest for hybrids can be seen across all countries.

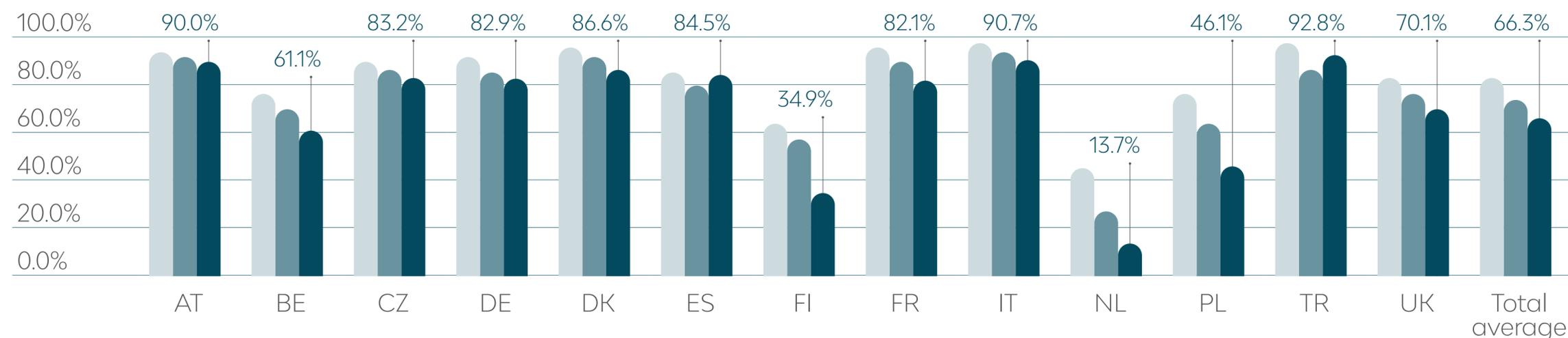
*Only countries with at least 200 renewals each year are shown here to ensure representative statistics

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

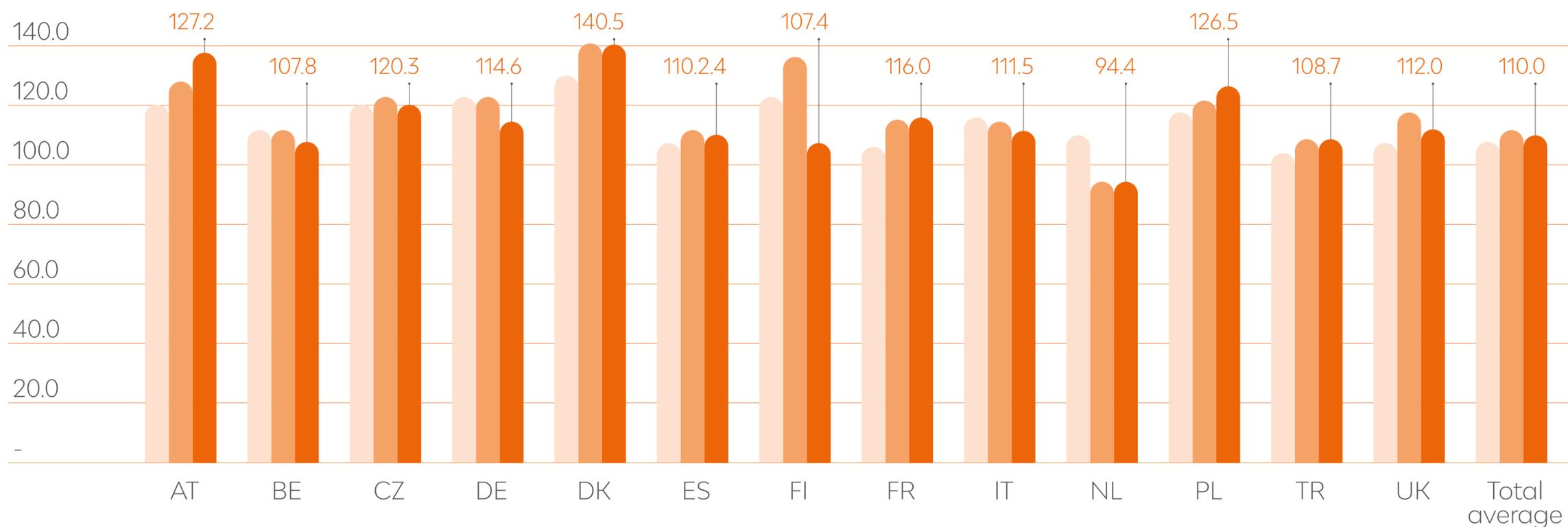


- Diesel is being replaced by petrol in countries like **Belgium, Czech Republic, France, The Netherlands and Poland.**
- The Netherlands has the largest share of petrol: **59.4% in 2020.**
- The shift away from diesel is seen in every country.
- The Netherlands has also the lowest share of diesel with **only 13.7% in 2020.**
- Austria, Italy and Turkey still have **+90% diesel share 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** (94.4 grams per km) because of its surge in BEV adoption.
- **Denmark has the highest average CO₂** (140.5 grams per km), and it is significantly up from 2018 (121.8 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 industrial industry, which explains why four of the top ten popular car models are from the C1 segment (the Skoda Octavia, Seat Leon and the Ford Focus).
- The switch from diesel to other powertrains is clear, with petrol, hybrid and BEV all gaining significantly larger shares (+6.5% p.p., +11.0% p.p. and +2.6% p.p. respectively).
- However, there are large differences per country in the pace of moving away from diesel. While in The Netherlands, only 13.7% of vehicles were registered as diesel, in the case of Austria, Italy and Turkey this is still +90%.
- Due to the large share of BEV registrations in 2020 (17.9%), The Netherlands has achieved the lowest average CO₂ (94.4 grams per km)*, while Denmark has the highest average CO₂ (140.5 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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