



# LeasePlan

What's next?

## Technology

# industry benchmark

Fleet trends in the European  
technology industry

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2018-2020



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## Introduction

In this technology 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 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 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%	D2	19%	D2	18%
2	D2	15%	C1	18%	C1	15%
3	D1	12%	SUV-C1	10%	SUV-C1	11%
4	E2	12%	E2	10%	SUV-D2	10%
5	SUV-C1	8%	D1	9%	D1	10%
6	MPV-C	6%	C2	6%	E2	8%
7	C2	5%	SUV-D2	6%	C2	6%
8	B1	5%	SUV-C2	5%	SUV-C2	6%
9	SUV-D2	4%	MPV-C	4%	B1	3%
10	SUV-C2	4%	B1	3%	SUV-D1	3%

- The **D2 segment** has become the most popular car segment, taking over from the C1 segment.
- The **SUV trend continues** with a significant increase in its share in the top 10 from 16% in 2018 to 30% in 2020.
- The **regular volume segments (B1, C1 and D1) have lost share** in the top 10 from 37% in 2018 to 28% in 2020.

Most popular car segment in 2020: D2



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

## Most driven car models, 2018-2020

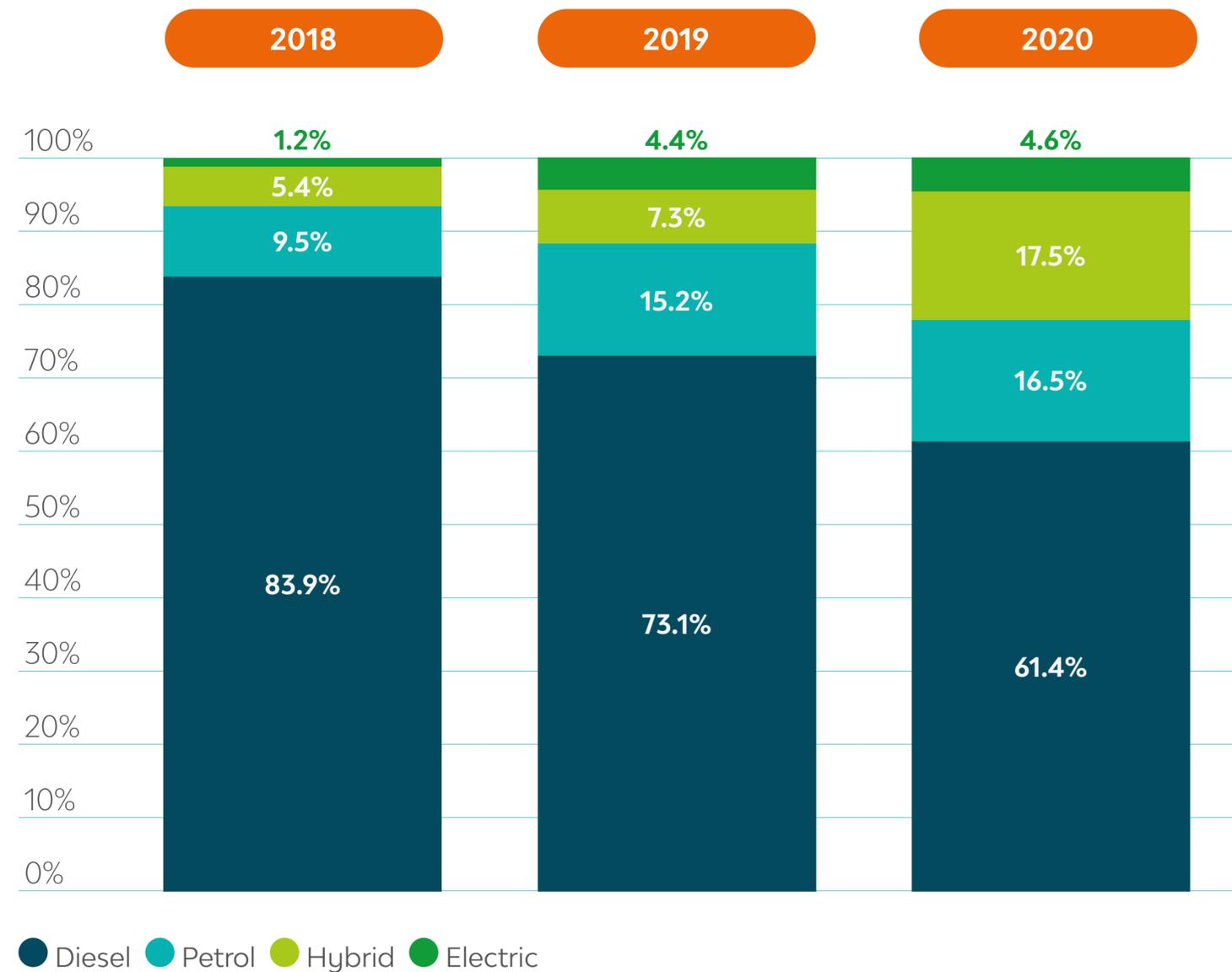
	2018	2019	2020
1	Volkswagen Passat	Mercedes Benz C-Class	Volkswagen Passat
2	BMW 5 Series	Volkswagen Golf	Mercedes Benz C-Class
3	Ford Focus	Ford Focus	BMW 3 Series
4	Mercedes Benz C-Class	Volkswagen Passat	Mercedes Benz Glc-Class
5	Skoda Octavia	Skoda Octavia	Volkswagen Golf
6	Volkswagen Golf	BMW 5 Series	Ford Focus
7	Opel Astra	BMW 3 Series	Peugeot 3008
8	BMW 3 Series	Mercedes Benz E-Class	Mercedes Benz E-Class
9	Mercedes Benz E-Class	Peugeot 3008	Volkswagen Tiguan
10	Audi A4	Tesla Model Iii	BMW X1

- The **Volkswagen Passat** has remained the most popular car model, although the Mercedes Benz C-Class took over in 2019.
- The **BMW 3 Series** saw its popularity increase the most, moving from eighth place in 2018 to third place in 2020.
- The **BMW 5 Series** has seen the largest drop in popularity, moving from second place in 2018 to outside the top 10 in 2020.
- The **Volkswagen group** & **Mercedes Benz** remain dominant, each having three vehicles in the top 10 in 2020.

Most popular car in 2020: Volkswagen Passat



## Powertrain trends, 2018-2020

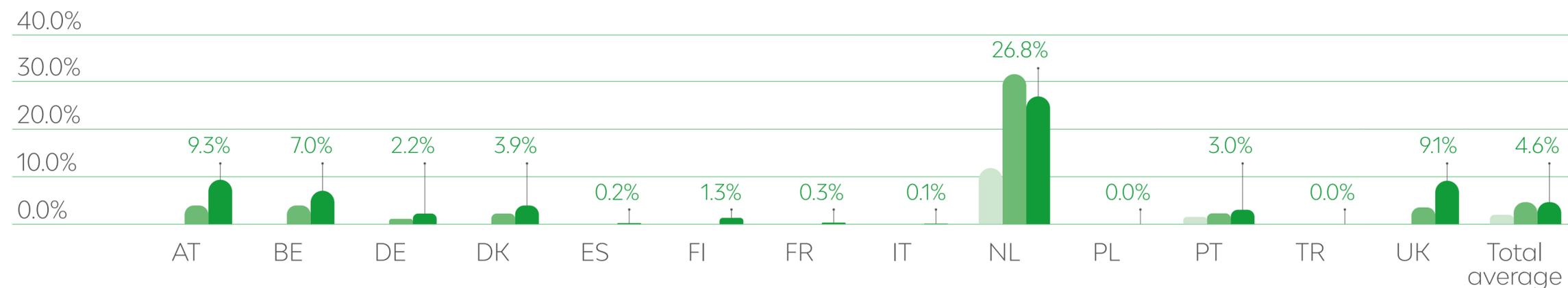


p.p. = percentage points

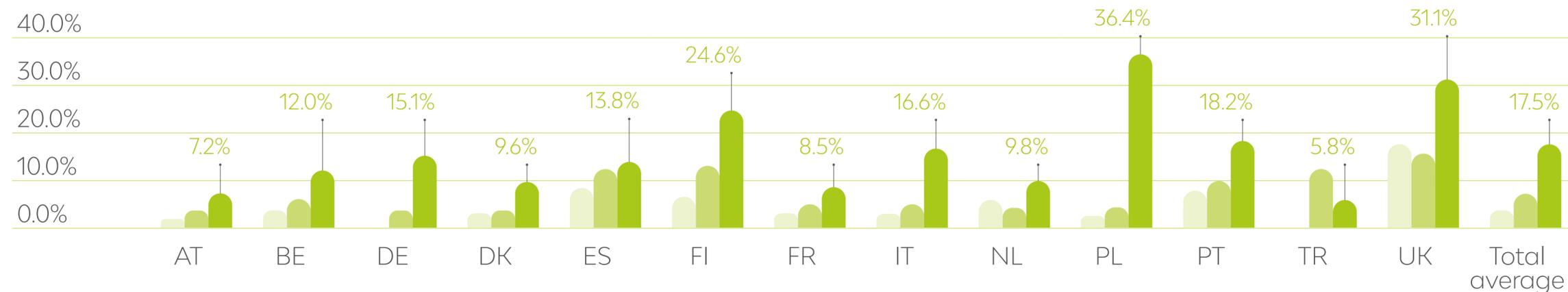
- Given the increasing sustainable pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 22.5% p.p.**
- **Petrol has increased by 7.0% p.p.** benefiting from the need for an alternative to diesel.
- Hybrid has seen an **increase of 12.1% p.p.** almost tripling its share from 2018.
- Lastly, the **battery electric vehicle (BEV) share has increased by 3.4% 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

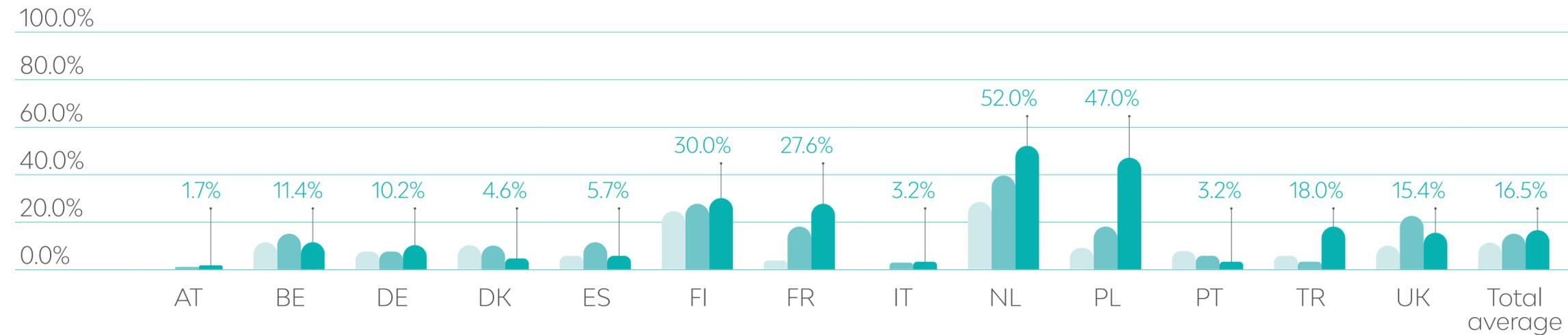


- When it comes to BEVs, The Netherlands is ahead of all countries with **a share of 26.8% in 2020**, but this is a decrease when compared to 2019.
- The Netherlands has also seen the largest increase in BEV share, **from 11.4% in 2018 to 26.8% in 2020**.
- For hybrids, Poland has the largest share with **36.4% of all vehicles** in 2020 compared to 16.3% hybrids in 2018.
- A renewed interest for hybrids can be seen across all countries.

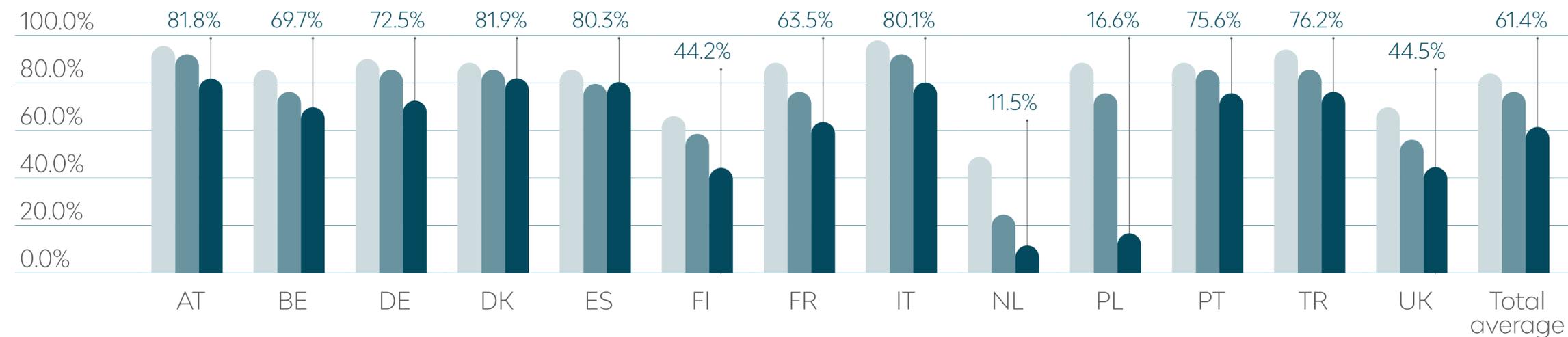
\*Only countries with at least 200 renewals each year are shown here to ensure representative statistics

## 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

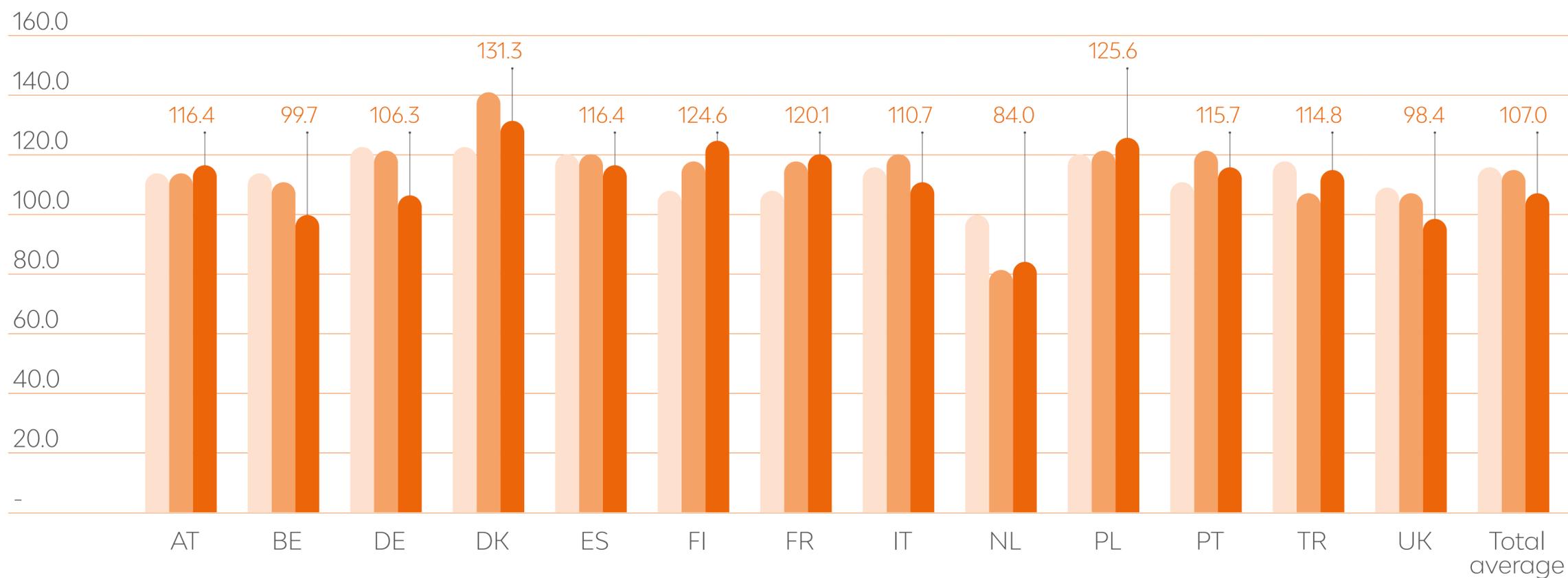


- Diesel is being replaced by petrol in countries like **Germany, Finland, France, The Netherlands, Poland and Turkey.**
- The Netherlands has the largest share of petrol: **52.0% in 2020.**
- The shift away from diesel is seen in every country.
- The Netherlands has also the lowest share of diesel with **only 11.5% in 2020.**
- Poland had the largest drop in share of diesel, from **86.0% in 2018 to 16.6% in 2020.**

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

## CO<sub>2</sub> averages per country, 2018-2020\*

Averages CO<sub>2</sub> per country\* ● 2018 ● 2019 ● 2020



- No clear trend can be detected across countries\*\* when it comes to average CO<sub>2</sub>, with some countries increasing their average CO<sub>2</sub> compared to 2018 and some decreasing it.
- **The Netherlands has the lowest average CO<sub>2</sub>** (84.0 grams per km) because of its surge in BEV adoption.
- **Denmark has the highest average CO<sub>2</sub>** (140.5 grams per km), although it has decreased from the 2019 level (142.9 grams per km).

\*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 has become the most popular segment in the technology industry, which explains why two of the top three popular car models are from the D2 segment (the BMW 3 Series and the Mercedes Benz C-Class).
- The switch from diesel to other powertrains is clear, with petrol, hybrid and BEV all gaining significantly larger shares (+7.0% p.p., +12.1% p.p. and +3.4% p.p. respectively).
- However, there are large differences per country in the pace of moving away from diesel. While in The Netherlands only 11.5% of vehicles were registered as diesel, in the case of Austria, Denmark, Spain and Italy this is still +80%.
- Due to the large share of BEV registrations in 2020 (17.9%), The Netherlands has achieved the lowest average CO<sub>2</sub> (84.0 grams per km)\*. Denmark has the highest average CO<sub>2</sub> (131.5 grams per km)\*.



For more information, please contact your LeasePlan liaison or LeasePlan Consultancy at [ics@leaseplan.com](mailto:ics@leaseplan.com).

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