

Construction

industry benchmark 2019-2021

Fleet trends in the European
construction industry
June 2022



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In this construction industry benchmark report, we highlight the most important fleet trends in Europe by comparing the passenger car registrations between 2019 and 2021.

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 120 international companies. For the scope and to make sure the data is representative, we've only included countries where at least 100 passenger cars were renewed within the industry each year (2019, 2020 and 2021).

If you would like to know how sustainable this industry is compared to other industries please check out our [Sustainable Industry Fleet Ranking 2022](#).

The C1 remains the most popular car segment

Most driven car segments*, 2019-2021

2019			2020			2021		
1	C1	32%	C1	24%		C1	21%	
2	B1	16%	SUV-C1	13%		SUV-C1	17%	
3	SUV-C1	11%	B1	12%		D2	12%	
4	D1	9%	D1	11%		D1	9%	
5	D2	7%	D2	11%		B1	9%	
6	MPV-C	4%	SUV-D2	4%		SUV-D1	8%	
7	E2	4%	C2	4%		SUV-D2	5%	
8	SUV-B1	3%	MPV-C	4%		SUV-C2	4%	
9	SUV-D1	3%	SUV-D1	3%		MPV-C	4%	
10	C2	3%	E2	3%		E2	3%	

Most popular car segment in 2021:

C1
segment
Volkswagen Golf



The **C1 segment** has remained the most popular car segment but has declined significantly from 32% in 2019 to 21% in 2021.

The **SUV trend continues** with a top 10 share of 17% in 2019 to 34% in 2021.

The **SUV-C1** has increased the most from 11% in 2019 to 17% for 2021.

The **B1 segment** also saw a large decrease from 16% in 2019 to 9% for 2021.

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

The Peugeot 3008 is the most popular car in 2021 for the construction industry

Most driven car models, 2019-2021

	2019	2020	2021
1	Peugeot 308	Renault Clio	Peugeot 3008
2	Renault Clio	Peugeot 308	Renault Megane
3	Skoda Octavia	Skoda Octavia	Renault Clio
4	Peugeot 3008	Volkswagen Passat	Skoda Octavia
5	Volkswagen Passat	Peugeot 3008	Volkswagen Passat
6	Peugeot 208	Volvo V60	Ford Focus
7	Seat Leon	Ford Focus	Renault Captur
8	Ford Focus	BMW 3 Series	Volvo V60
9	Citroen C4 Spacetourer	Volkswagen Golf	Citroen C4 Spacetourer
10	Renault Megane	Mercedes Benz C-Class	Peugeot 2008

Most popular car in 2021:

Peugeot
3008



The **Peugeot 3008** is the most popular vehicle in 2021, for the first time a SUV-vehicle.

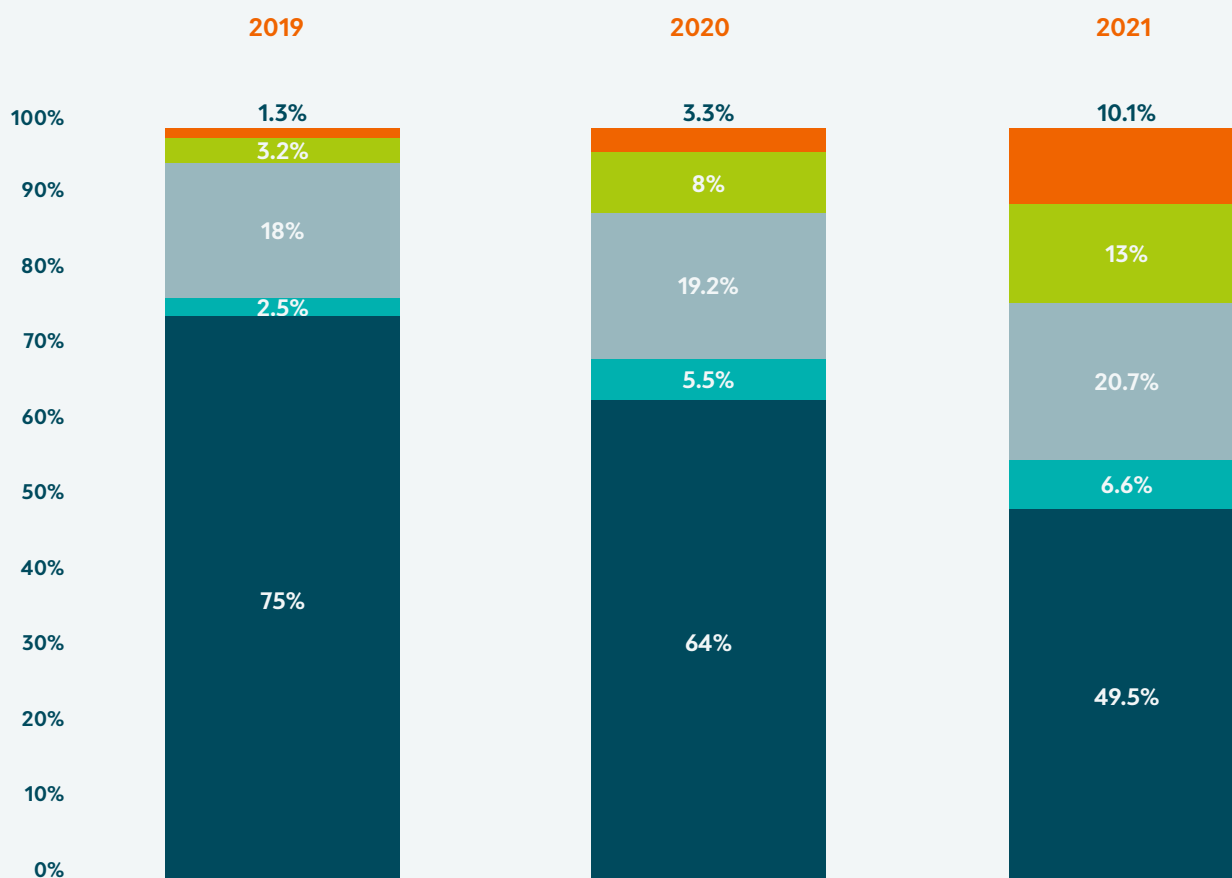
The **Renault Megane** increased significantly in popularity, coming in 2nd place in 2021 while having a 10th place in 2019.

The **Peugeot 308** has dropped in popularity, from 1st place in 2019 to a place outside of the top 10 in 2021.

The share of BEVs has more than doubled in a year

Trends in Powertrains, 2019-2021

● Diesel ● Hybrid ● Petrol ● PHEV ● BEV



The diesel withdrawal trend continues with the **share of diesel declining by 25.5% p.p.* from 2019 to 2021.**

The share of BEV has increased by 8.8% p.p.*, almost nine times higher than the share in 2019.

The share of PHEV has also increased significantly with **9.8% p.p.*** in 2021.

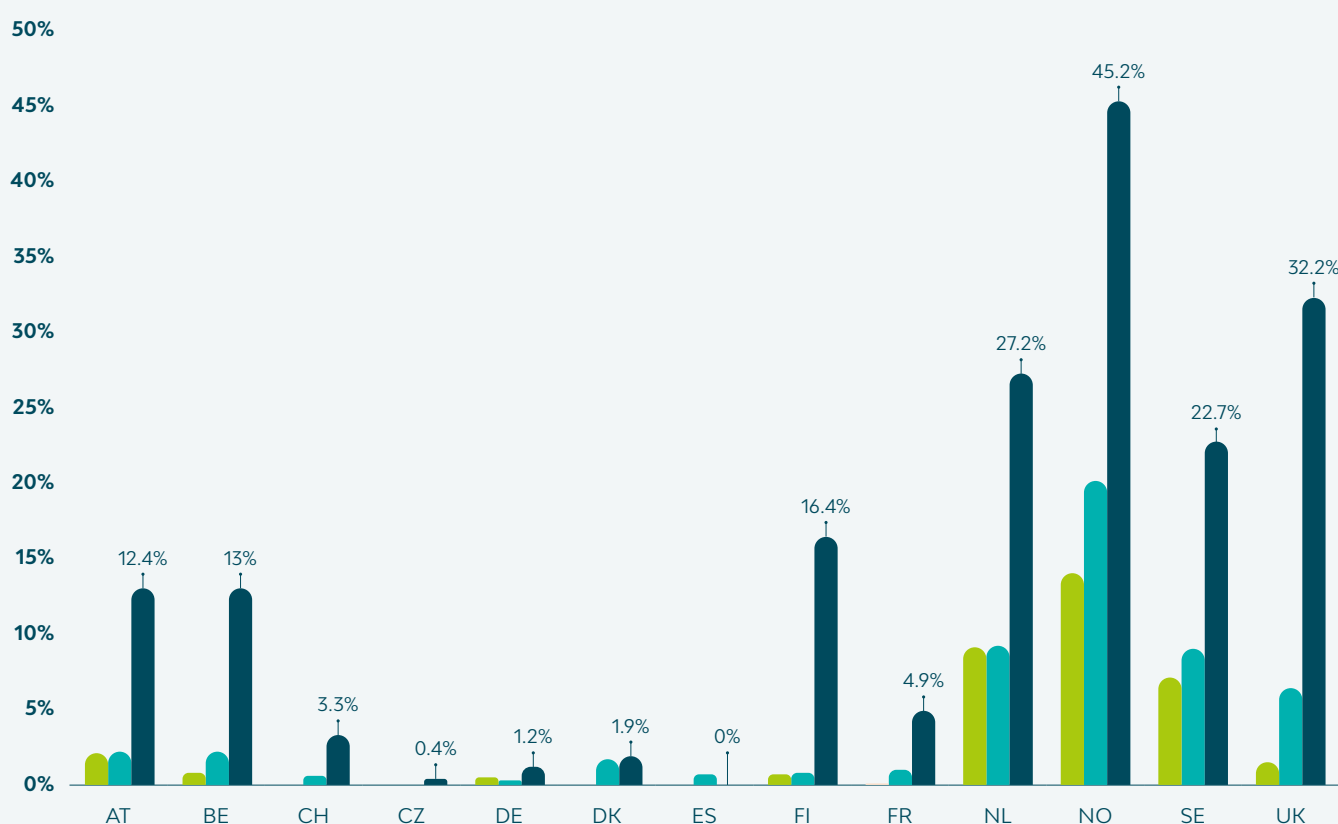
The share of petrol has slightly increased with **2.7% p.p.*** in 2021.

*P.P = Percentage Points

Battery electric vehicles increased substantially in the Northern European countries

Share of electric per country*, 2019-2021

● 2019 ● 2020 ● 2021



When it comes to BEVs, Norway has the highest share with **a share of 45.2% in 2021.**

The EV transition has accelerated in 2021 and primarily in Northern European countries.

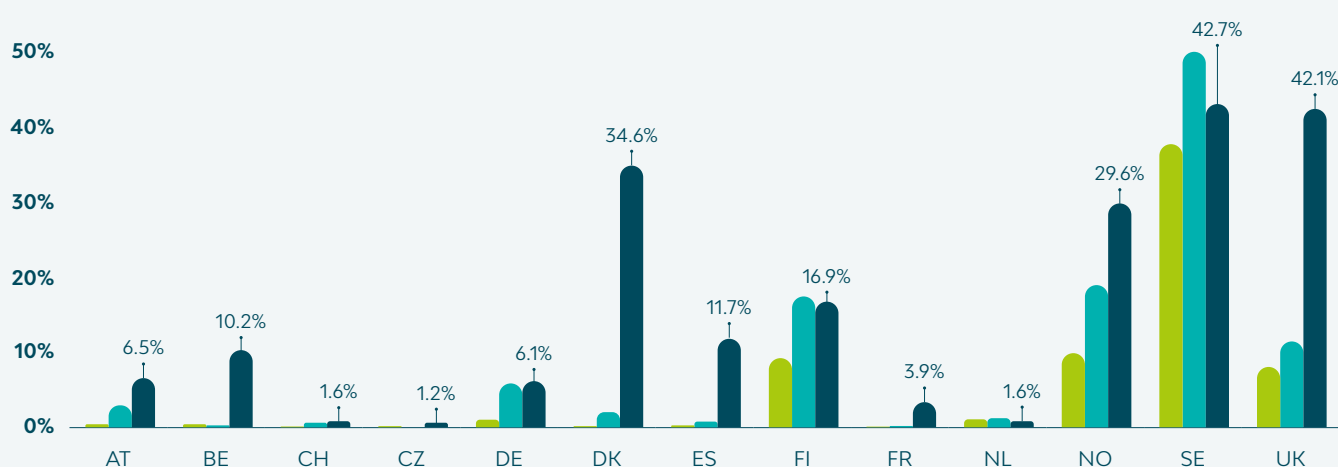
The United Kingdom has seen a large increase over the past two years **moving from 1.5% in 2019 to 32.2% in 2021.**

*Only countries with at least 100 renewals each year are shown here to ensure representative statistics

Share of PHEVs increased dramatically in Denmark while hybrids take off in Finland and the Netherlands

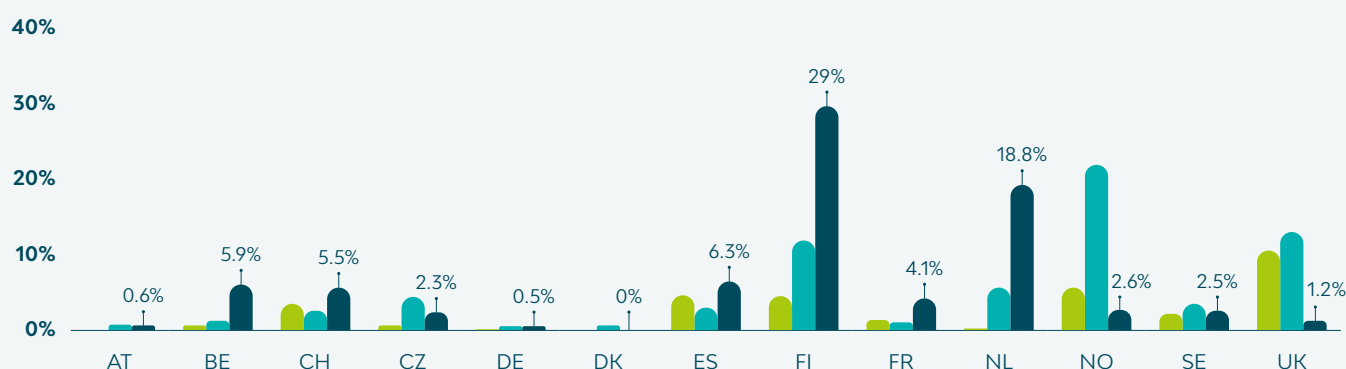
Share of PHEV per country*, 2019-2021

2019 2020 2021



Share of hybrids per country*, 2019-2021

2019 2020 2021



The share of PHEVs is the highest in Sweden for the second year in a row.

For hybrids, Finland has the largest share with **29% of all vehicles in 2021.**

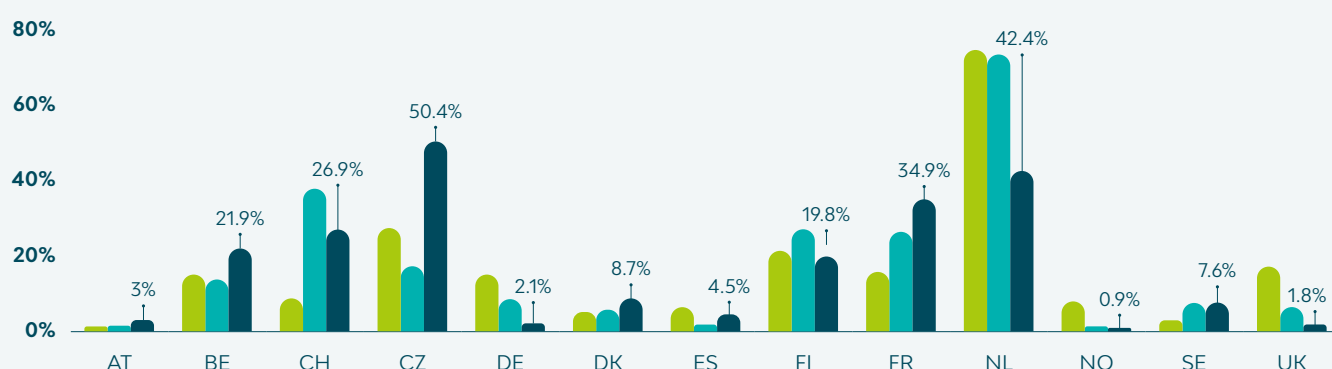
The United Kingdom has seen the largest increase in PHEVs over the last two years **moving from 7.5% to 42.1%.**

*Only countries with at least 100 renewals each year are shown here to ensure representative statistics

Share of diesel continues to decline but petrol hasn't declined at the same rate

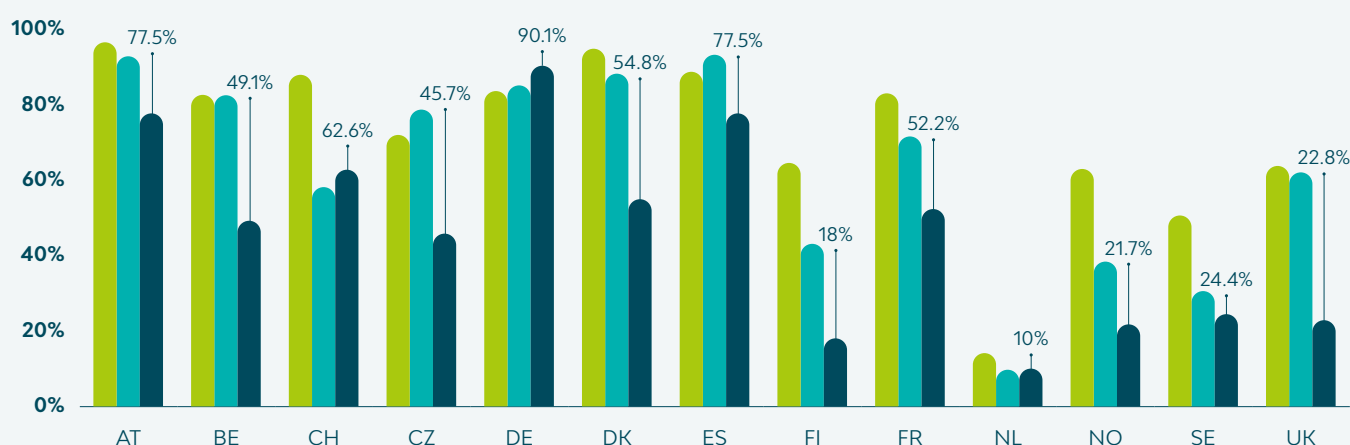
Share of petrol per country* 2019-2021

● 2019 ● 2020 ● 2021



Share of diesel per country*, 2019-2021

● 2019 ● 2020 ● 2021



Czech Republic has the largest share of petrol **50.4% in 2021**.

The shift away from diesel is seen in almost every country.

Only Germany shows a slight increase in the share of diesel, with **a total share of 90.1% in 2021**.

The Netherlands has the **lowest share of diesel vehicles, 10% in 2021**.

*Only countries with at least 100 renewals each year are shown here to ensure representative statistics

CO₂ averages* have declined in almost all countries

CO₂ average per country**, 2019-2021

2019 2020 2021



The average CO₂ value has decreased from 112.6 g/km in 2019 to 100.7 g/km in 2021. The downwards trend can be seen in all countries, apart from Switzerland, Germany and France.

Switzerland has the highest average CO₂, (138.0 grams per km), due to their low adaptation of PHEV & BEV (only 4.9% combined in 2021).

The United Kingdom has the lowest average CO₂ (44.9 grams per km) because of its surge in PHEV & BEV adoption.

*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 remains the most popular segment in the construction industry, however the C1 segment is less dominant than previous years. The most popular model in 2021 was the Peugeot 3008, which illustrates the increase in popularity in SUVs.

The switch from diesel to other powertrains is clear, specifically to BEV (+8.8% pp.) and PHEV (+9.8% p.p.).

Furthermore, there are large differences per country in the pace of moving away from diesel. While in the Netherlands only 10.0% of vehicles were registered as diesel, in the case of Germany this is still 90.1%.

Due to the large share of BEV (32.2%) and PHEV (42.1%) registrations in 2021, The United Kingdom has achieved the lowest average CO₂ (44.9 grams per km)*. While Switzerland has the highest average CO₂ (138.0 grams per km)*.

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

*Based on OEM reported CO₂ averages



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What's next?

Appendix A: Segmentation – Overview

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

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