Industrial

industry benchmark 2019-2021

Fleet trends in the European industrial industry

June 2022

LeasePlan International Consultancy Services

Contents

In this industrial 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 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 300 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 segment was the most popular vehicle segment

Most driven car segments*, 2019-2021

	2019		2020		2021	
1	C1	22%	C1	21%	C1	18%
2	D1	16%	D1	16%	D1	14%
3	D2	13%	D2	14%	SUV-D1	12%
4	SUV-C1	12%	SUV-C1	13%	D2	12%
5	E2	7%	SUV-D2	7%	SUV-C1	10%
6	SUV-D2	5%	E2	5%	SUV-D2	9%
7	C2	4%	SUV-C2	4%	E2	5%
8	MPV-C	4%	C2	4%	SUV-C2	5%
9	SUV-D1	4%	SUV-D1	4%	B1	5%
10	SUV-C2	3%	MPV-C	3%	C2	4%

Most popular car segment in 2021:

C1 segment
Skoda Octavia

The **C1 segment** has remained the most popular car segment, although its share has decreased (from 22% in 2019 to 18% in 2021).

The SUV trend continues with a significant increase in its share in the top 10 (from 28% in 2019 to 36% in 2021).

The premium segments C2, D2 and E2 have lost positions and share in the top 10 from 24% in 2019 to 21% in 2021.

* For more information on car segments, please see Appendix A

The Volkswagen Passat remained the most popular car model

Most driven car models, 2019-2021

	2019	2020	2021
1	Volkswagen Passat	Volkswagen Passat	Volkswagen Passat
2	Skoda Octavia	Skoda Octavia	Skoda Octavia
3	Renault Megane	Peugeot 3008	BMW 3 Series
4	Volkswagen Golf	Skoda Superb	Peugeot 3008
5	Skoda Superb	Seat Leon	Skoda Superb
6	Peugeot 3008	Volvo V60	Toyota Rav4
7	Audi A4	BMW 3 Series	Seat Leon
8	Volkswagen Tiguan	Audi A4	Renault Megane
9	Volvo V60	Volkswagen Tiguan	Audi A4
10	Volvo Xc60	Renault Megane	Volvo Xc60

Most popular car in 2021:

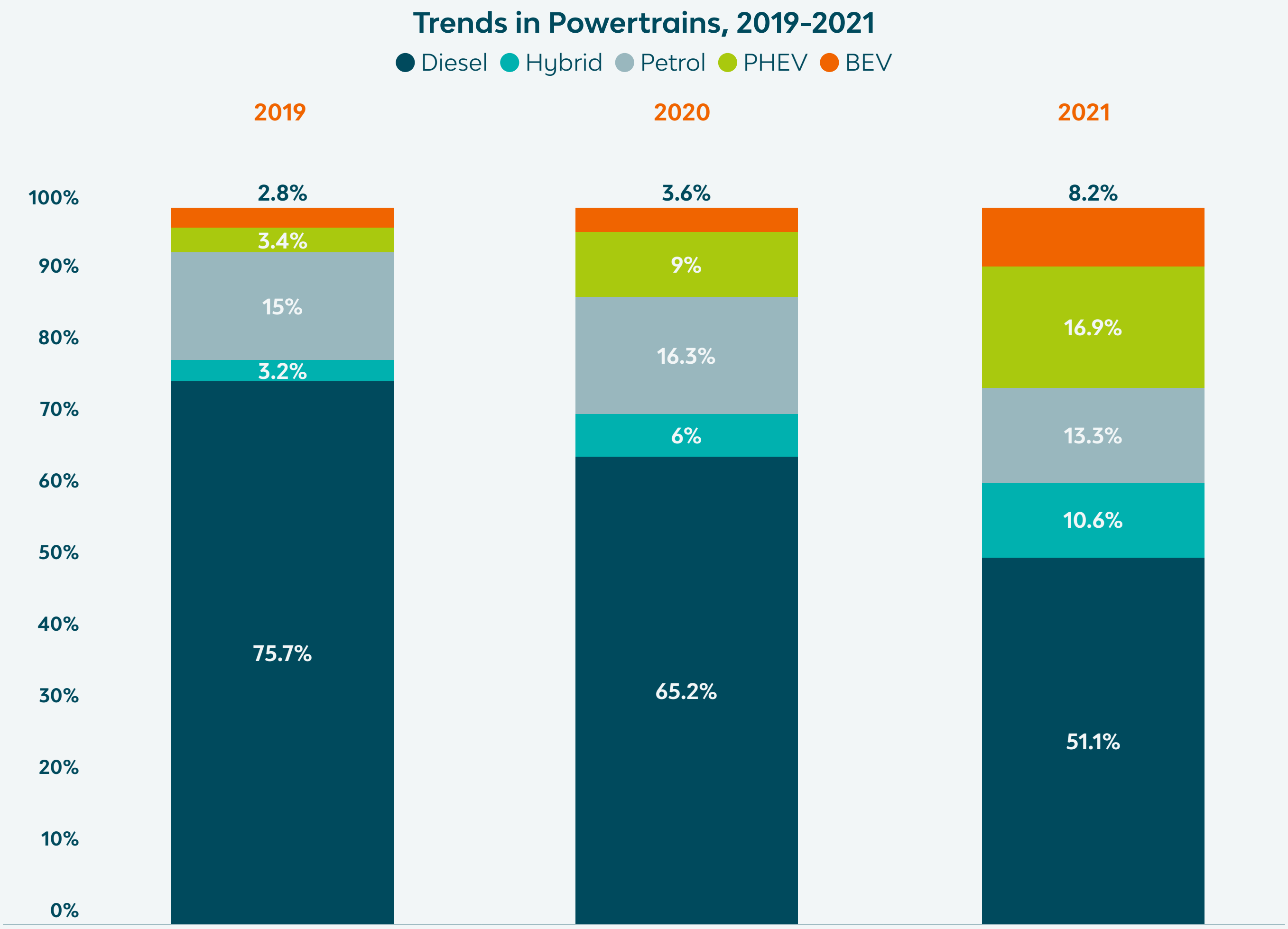
Volkswagen Passat

The **BMW 3 Series** saw its popularity increase the most, moving from outside the top 10 in 2019 to third place in 2021.

The **Volkswagen Golf** has seen the largest drop in popularity, moving from third place in 2019 to outside the top 10 in 2021.

The **Volkswagen group** remains popular with five vehicles in the top 10.

BEV increased by 5.4% p.p in a year



Given the increasing pressure to reduce emissions from fuel, it is no surprise that the **share of diesel declined by 24.6% p.p*.**

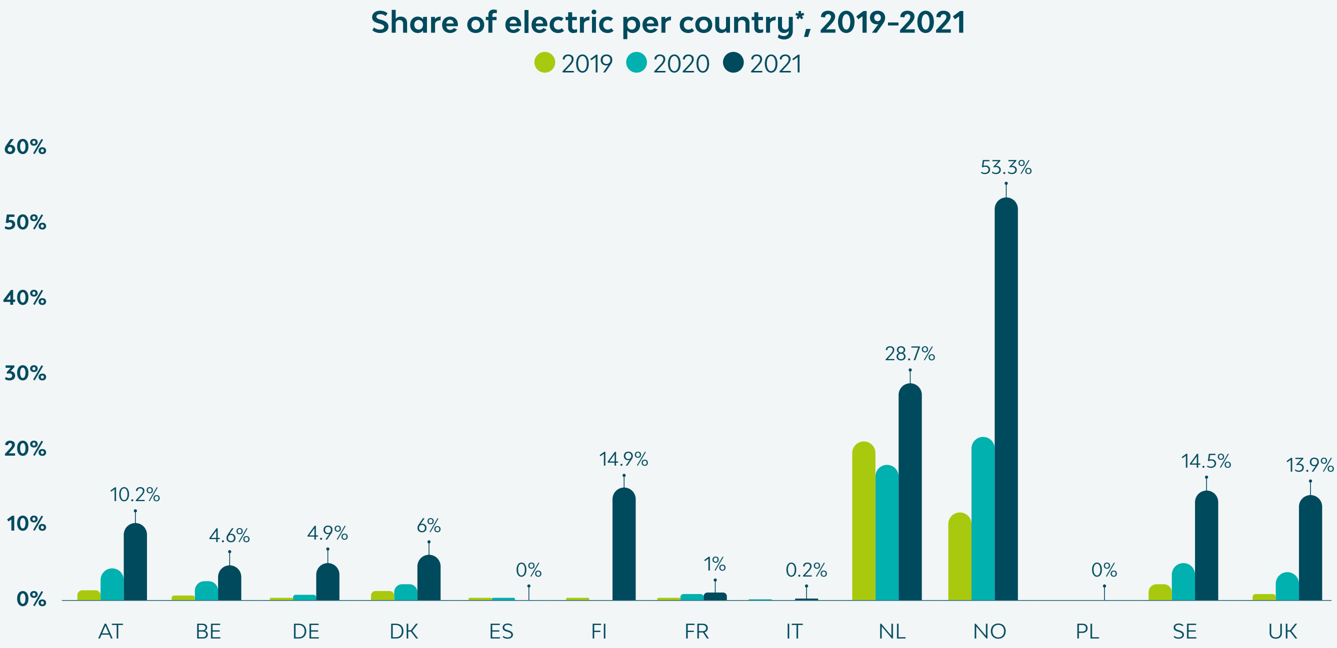
Petrol has slightly declined by 1.7% p.p*.

Hybrid has seen an **increase of 7.4% p.p.**, tripling its share from 2019.

PHEV has seen the largest increase, with **an increase of 13.5% p.p.* PHEV is now the second most popular fuel type.**

*P.P = Percentage Points

Country fuel mix highlighted BEVs, 2019-2021



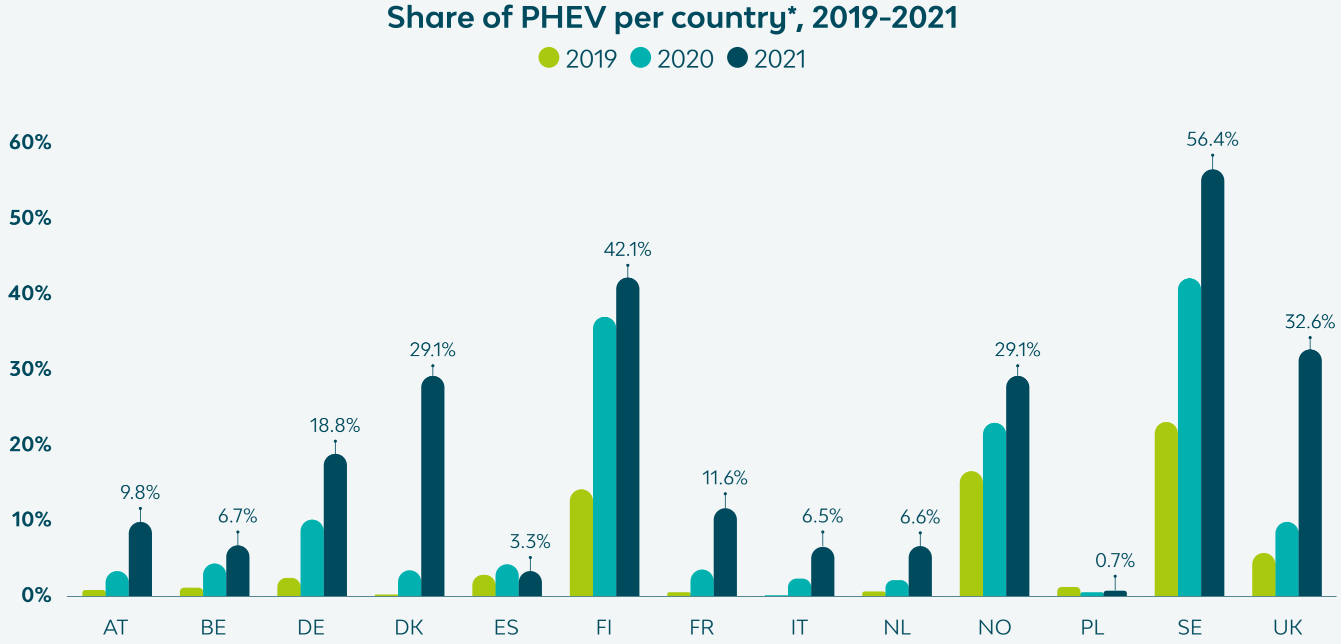
When it comes to BEVs, Norway is ahead of all countries with **a share of 53.3% in 2021**, more than doubling their share from last year.

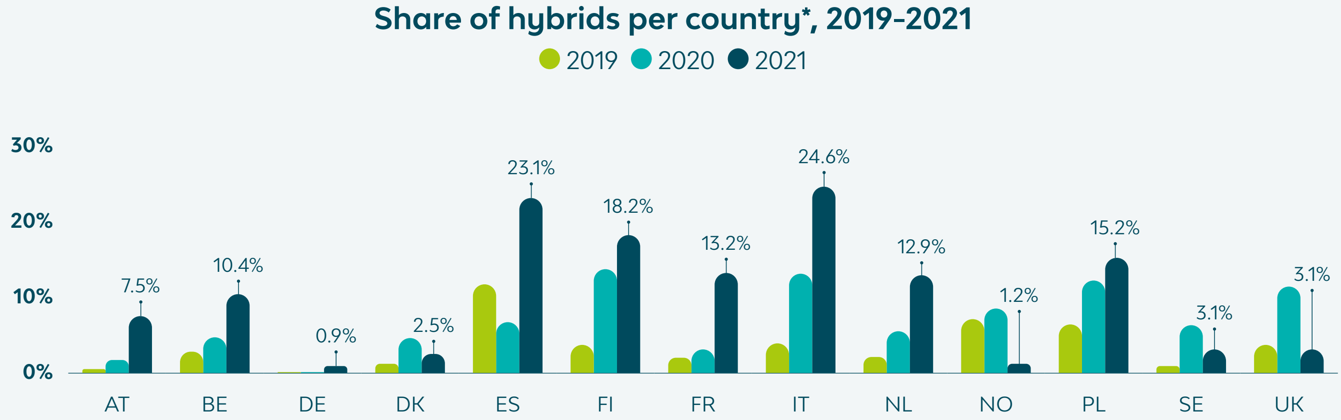
The Netherlands is second in BEV adoptions with a **28.7% share.**

Finland, Sweden and the UK BEV adoption is also increasing. These countries have come from almost **no BEVs in 2019 to a share between 14%-15% in 2021.**

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

Country fuel mix highlighted PHEV & hybrid vehicles, 2019-2021





When it comes to PHEVs, Sweden is ahead of all countries with **a share of 56.4% in 2021**, due to favourable taxation for this powertrain.

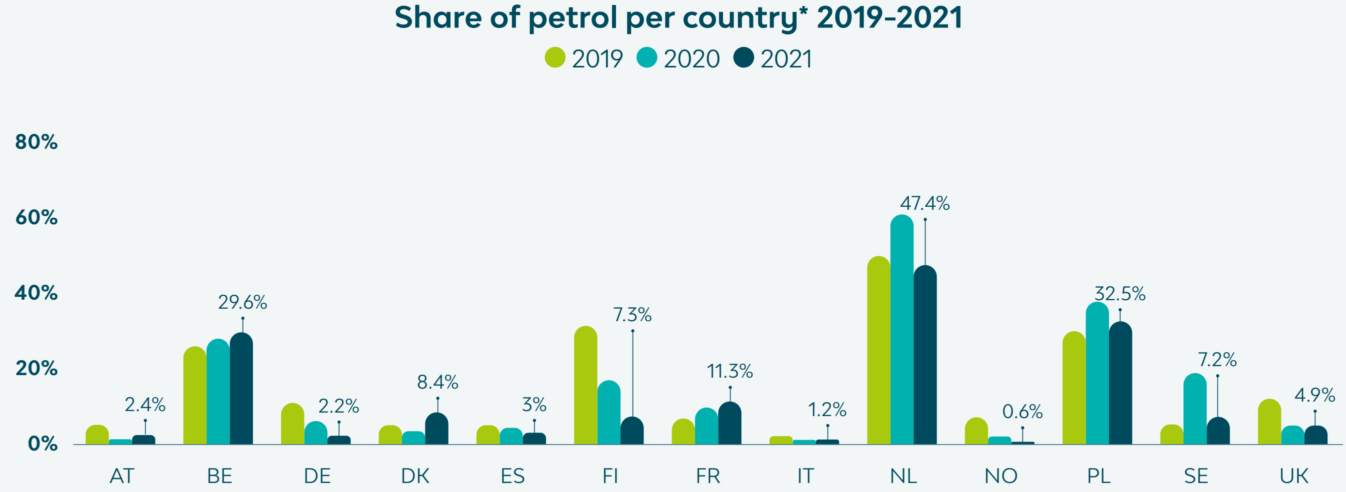
Almost all countries show a strong increase in PHEVs.

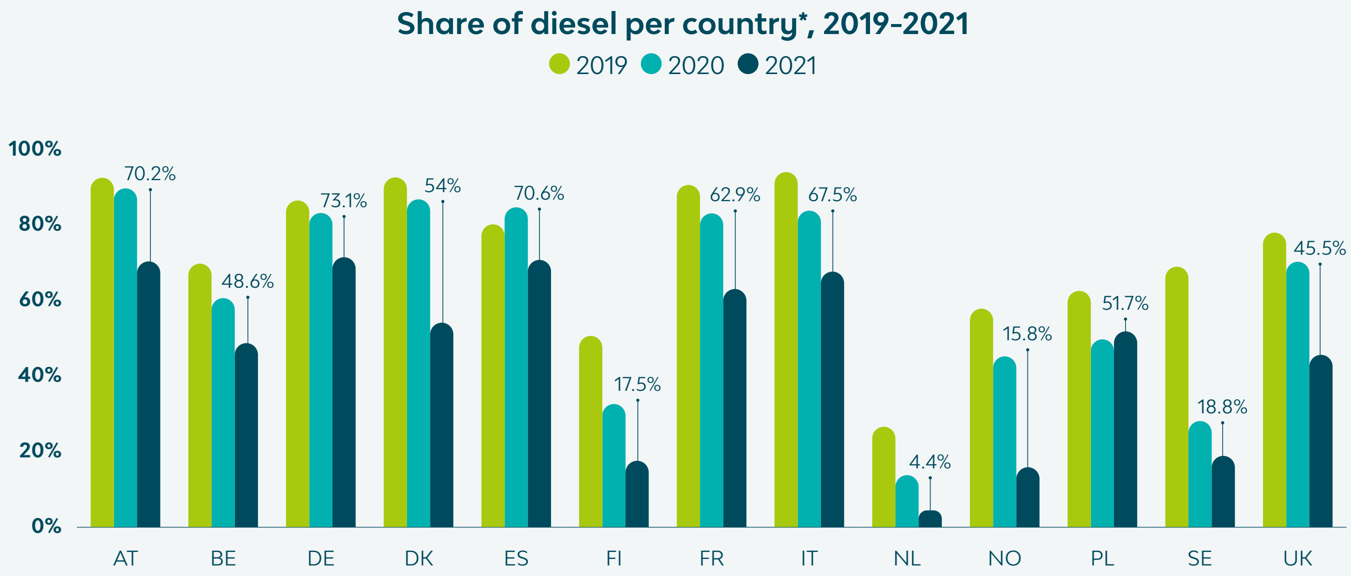
For hybrids, Italy has the largest share with **24.6% of all vehicles** in 2021.

In most countries a strong increase can be seen for hybrids but in Scandinavian countries and the UK it has decreased.

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

Country fuel mix highlighted petrol & diesel vehicles, 2019-2021





In most countries, the petrol share is decreasing or stabilizing.

The shift away from diesel is seen in every country.

Sweden has decreased its share of diesel the most with a drop of **40%**.

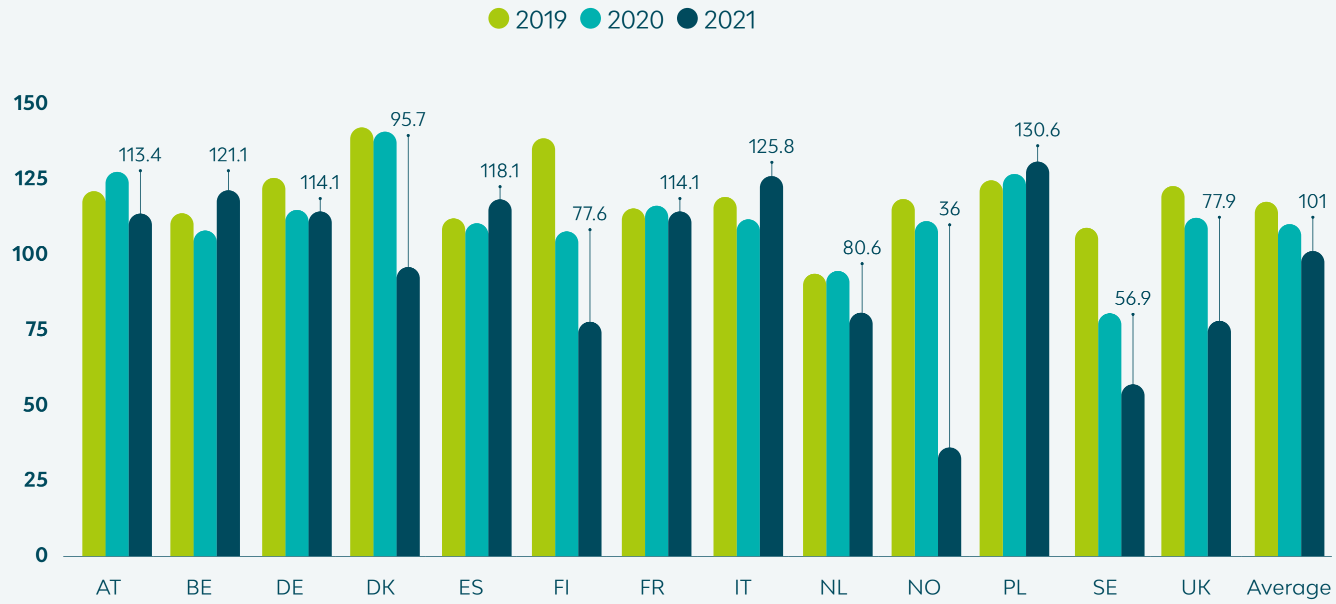
The Netherlands has the largest share of petrol with **47.4%** and the lowest share of diesel with **4.4%**.

The share of diesel is still the largest in Germany with **73.1%**.

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

Finland, Norway, Sweden and the UK saw a decrease in average CO_2 emissions* over the past year

CO_2 average per country, 2019-2021**



While many countries saw a decrease in CO_2 between 2019 and 2021, some countries saw its CO_2 actually increase.

Norway has the lowest average CO_2 (36.0 grams per km) because of its surge in BEV and PHEV adoption.

Poland has the highest average CO_2 (130.6 grams per km), and it is up from 2019 (124.4 grams per km).

*Based on OEM reported CO_2
**Only countries are shown here with at least 200 renewals each year 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 Renault Megane).

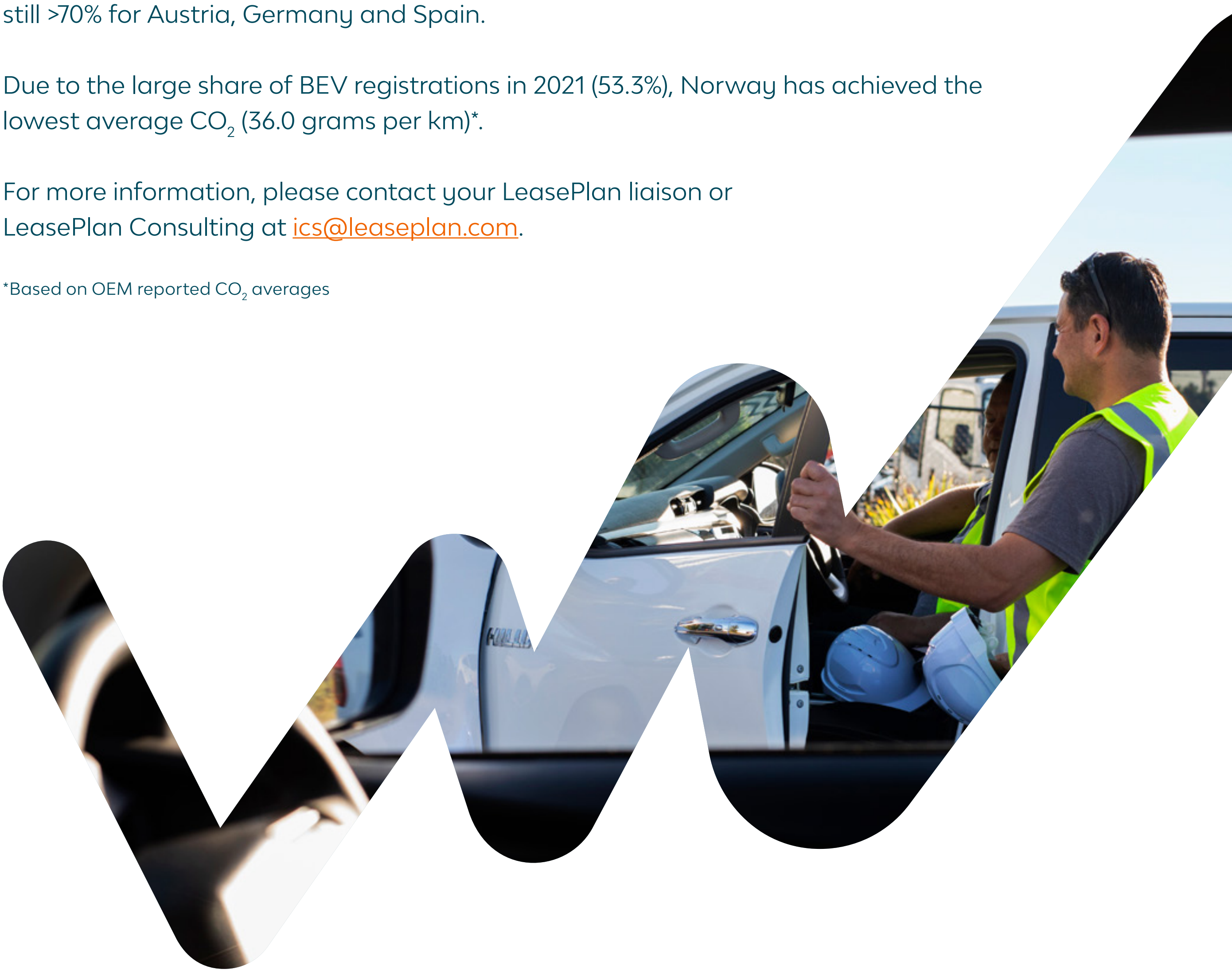
The switch from diesel to alternative powertrains is clear, with BEV, PHEV and hybrid all gaining significantly larger shares (+5.4% p.p., +13.5% p.p., and +7.4% p.p., respectively).

However, there are large differences per country in the pace of moving away from diesel. While in the Netherlands, only 4.4% of vehicles were registered as diesel in 2021, this was still >70% for Austria, Germany and Spain.

Due to the large share of BEV registrations in 2021 (53.3%), Norway has achieved the lowest average CO_2 (36.0 grams per km)*.

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

*Based on OEM reported CO_2 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