Industrial industry benchmark 2020-2022

Fleet trends in the European industrial industry
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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 2020 and 2022.

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 (2020, 2021 and 2022).

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

Key findings

The C1 segment has remained the most popular segment in the Industrial industry, and the Toyota Corolla has also taken the spot as most popular model.

As for powertrains, the switch from diesel to alternative powertrains is clear, with battery electric vehicles (BEVs), plug-in hybrids (PHEVs) and hybrid all gaining significantly larger shares of fleet.

However, there are large differences per country in the pace of diesel decline. In 2022 in the Netherlands, only 4% of vehicles were registered as diesel while this was still 73% in Germany.

Since 2020, the industry was able to lower its average CO_2 significantly by 18.3 g/km to 96.5 g/km. This trend is led by Sweden with an average CO_2 emissions of 33.9 g/km.

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*p.p. is percentage points

The C1 segment remains the most popular car segment with a share of 18%

Most driven car segments*, 2020-2022

	2020		2021		2022	
1	C1	19%	C1	19%	C1	18%
2	D1	17%	D1	13%	SUV-D1	15%
3	D2	14%	SUV-D1	13%	D1	11%
4	SUV-D1	10%	D2	12%	D2	11%
5	SUV-C1	10%	SUV-C1	7%	SUV-D2	8%
6	SUV-D2	7%	SUV-D2	7%	SUV-C1	7%
7	SUV-C2	4%	SUV-C2	6%	SUV-C2	7%
8	E2	4%	B1	5%	B1	7%
9	MPV-C	4%	E2	5%	E2	4%
10	C2	3%	MPV-C	3%	SUV-E2	3%

Most popular car segment in 2022:

The SUV trend continues with a significant increase in its share in the top 10, from 31% in 2020 to 40% in 2022.

The **D1 segment** has declined the most, from 17% in 2020 to 11% in 2022.

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

The Toyota Corolla is now the post popular car, while it didn't make the top 10 in 2020

Most driven car models, 2020-2022

	2020	2021	2022
1	Volkswagen Passat	Volkswagen Passat	Toyota Corolla
2	Skoda Octavia	Skoda Octavia	Toyota Yaris
3	Peugeot 3008	BMW 3 Series	Volkswagen Tiguan
4	Skoda Superb	Skoda Superb	Skoda Superb
5	Toyota RAV4	Peugeot 3008	Peugeot 3008
6	BMW 3 Series	Toyota RAV4	BMW 3 Series
7	Audi A4	Seat Leon	Renault Megane
8	Volvo V60	Renault Megane	Skoda Kodiaq
9	Volkswagen Tiguan	Toyota Yaris	Volvo XC40
10	Ford Mondeo	Volkswagen Golf	Toyota RAV4

Most popular car in 2022:

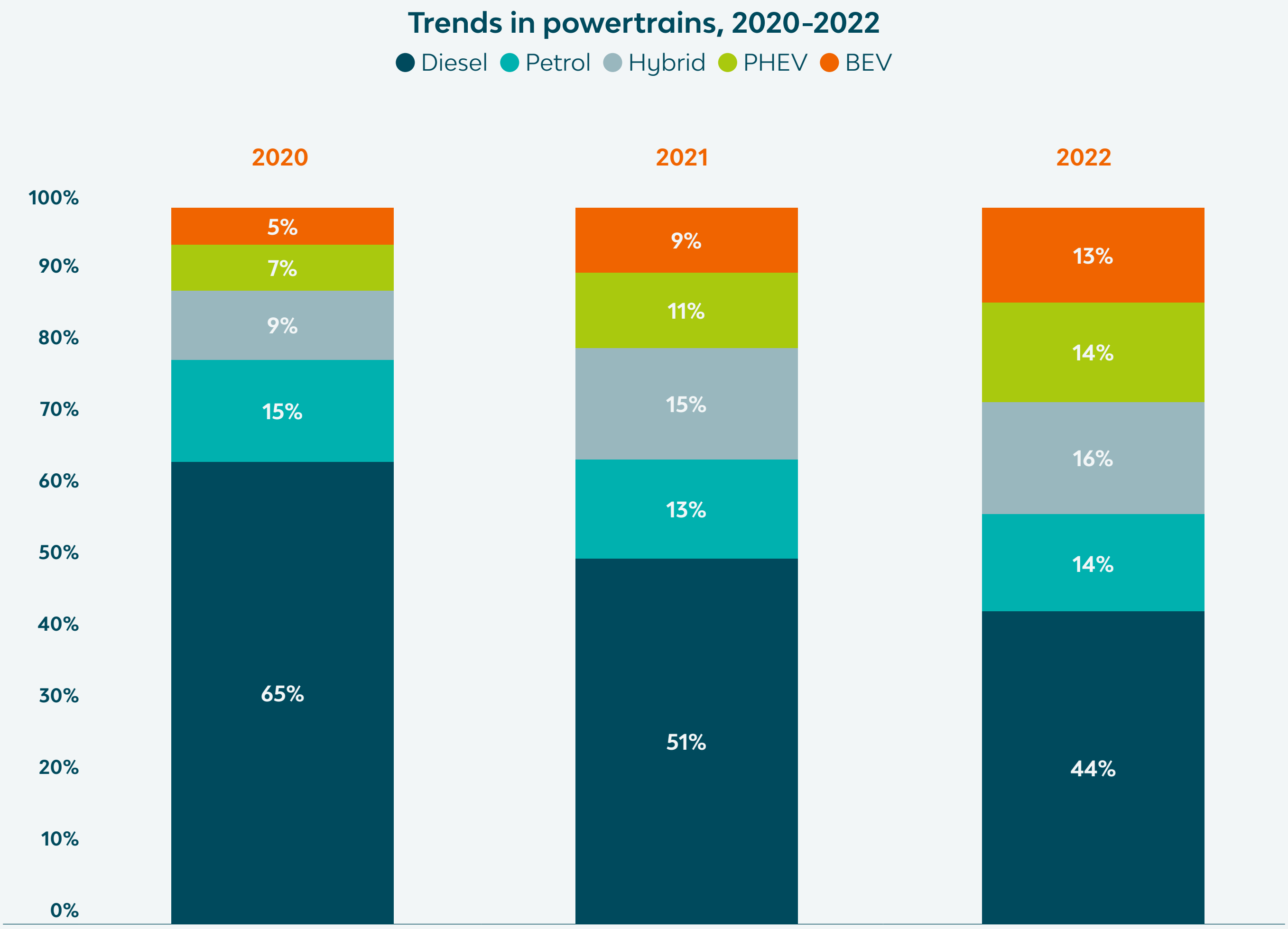
C1 segment
Toyota Corolla

Similarly, the **Toyota Yaris** has become the second most popular car in 2022 while not being in the top 10 in 2020.

The **Volkswagen Passat** has disappeared from the top 10 while being the most popular vehicle in 2020 and 2021.

Toyota has become the most popular brand, with 3 car models in the top 10.

Since 2020, the share of diesel in fleet has declined by 21 percentage points



Battery electric vehicles (BEVs) have benefitted the most from diesel's decline, with an **8 p.p.* increase since 2020.**

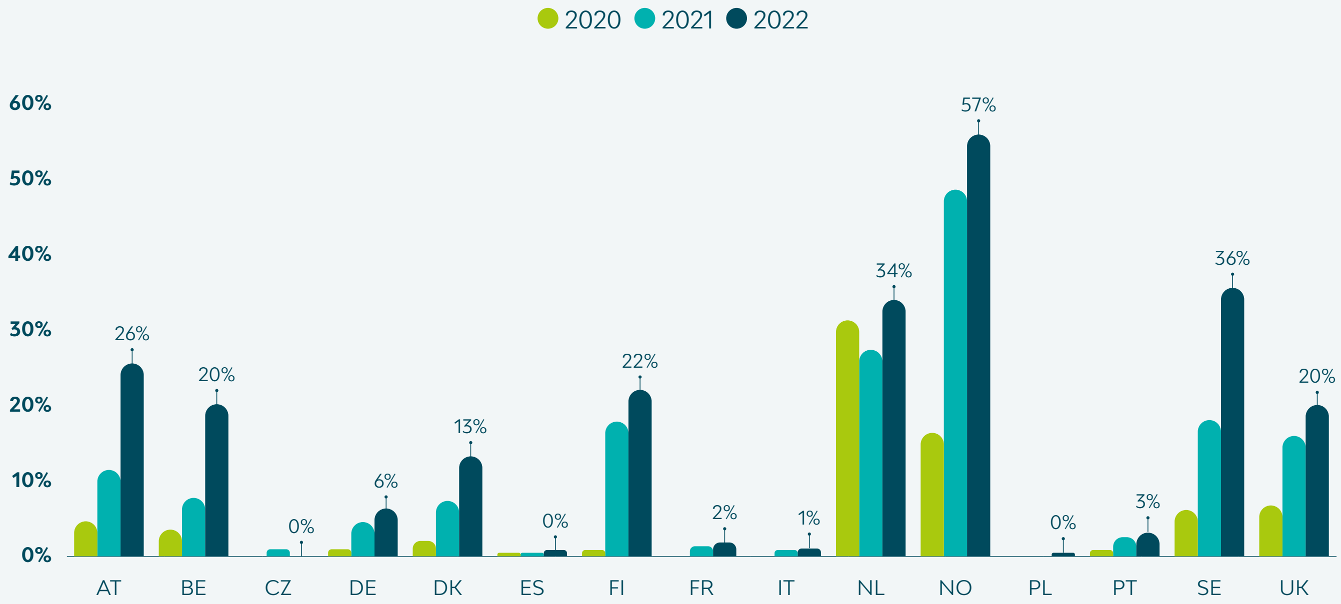
Plug-in hybrids (PHEVs) and hybrids closely follow, with an increase of **7 p.p.* over two years.**

Petrol has more or less stayed the same with a fleet share of 14%.

*P.P = Percentage Points

The adoption of battery electric vehicles in fleet is highest in Northern European countries

Share of BEV per country*, 2020-2022



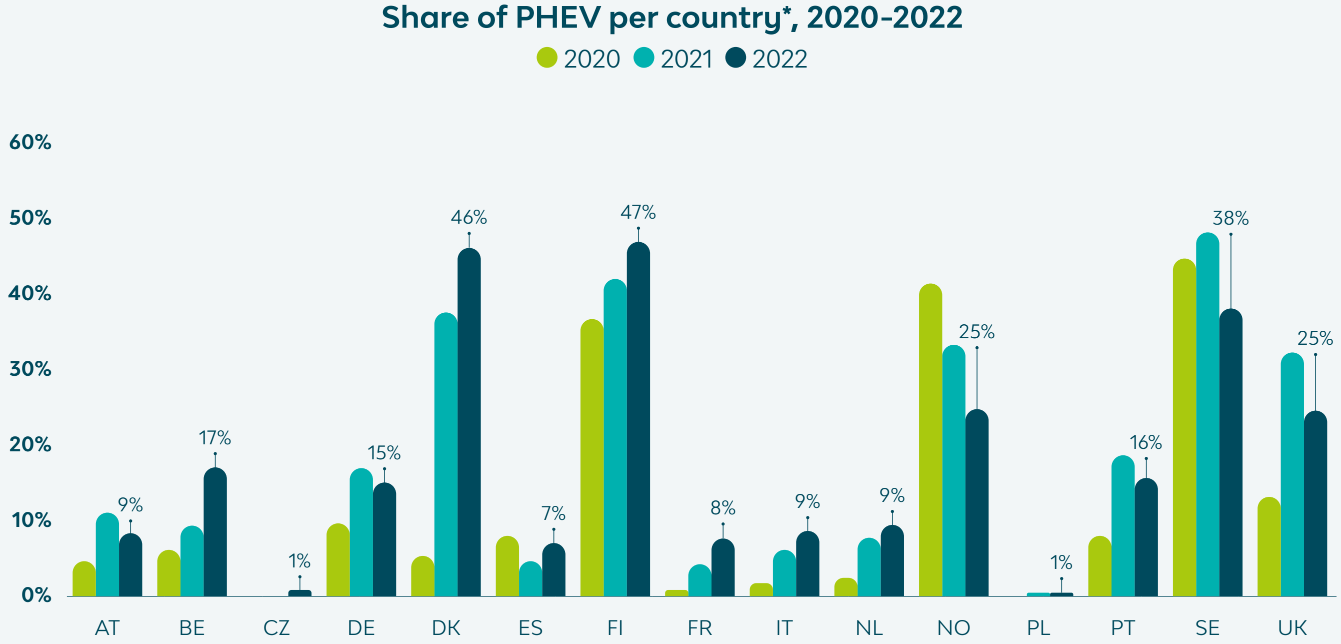
Norway is ahead of all countries with a BEV share of 57% in 2022, more than tripling their share from 2020.

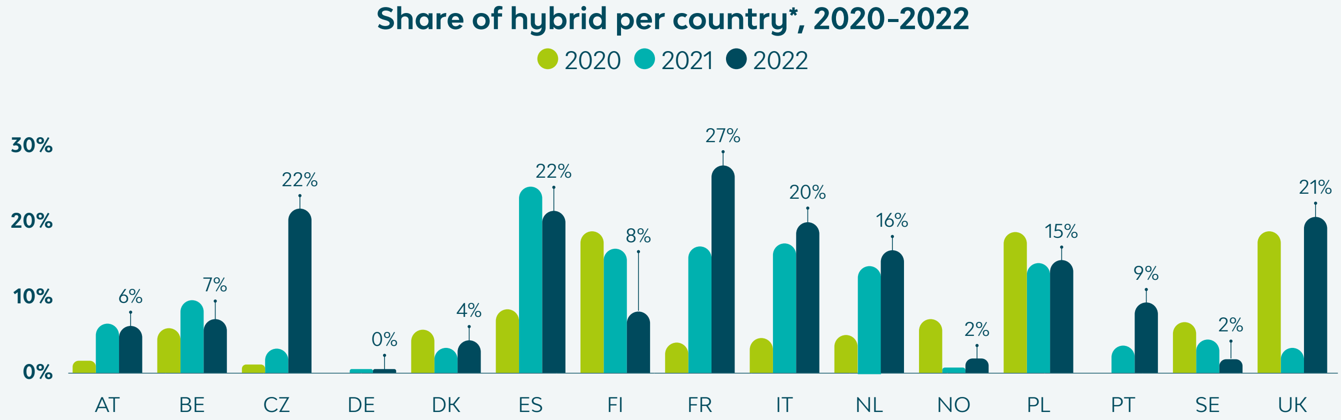
Sweden has the second-largest BEV share with 36%.

The BEV adoption has not yet started in Eastern and Southern European countries.

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

Adoption of PHEVs and hybrids has been mixed across countries





Finland and Denmark have the largest PHEV share: 47% and 46% respectively.

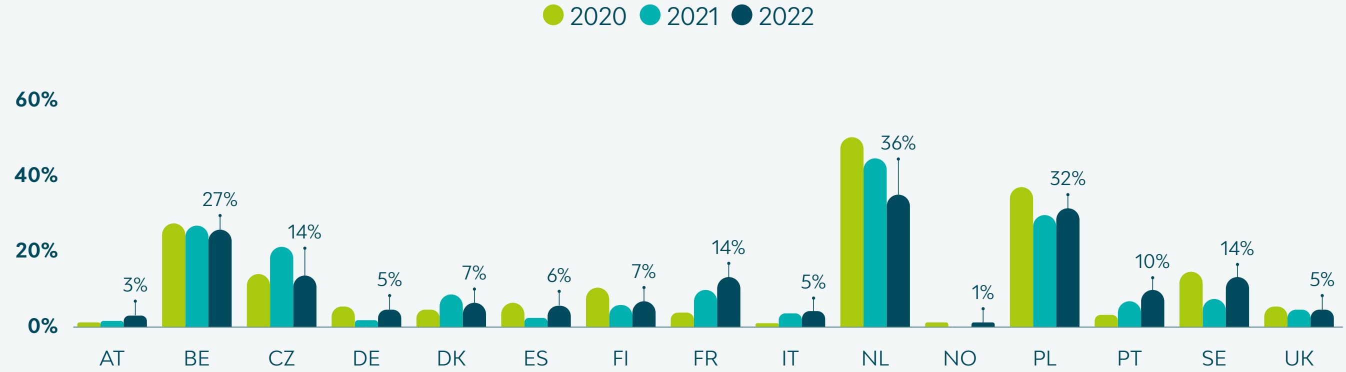
France has the largest hybrid share, with 27% of all vehicles in 2022.

The Czech Republic and **France** have seen the largest increases in share of hybrids in fleet over the past year.

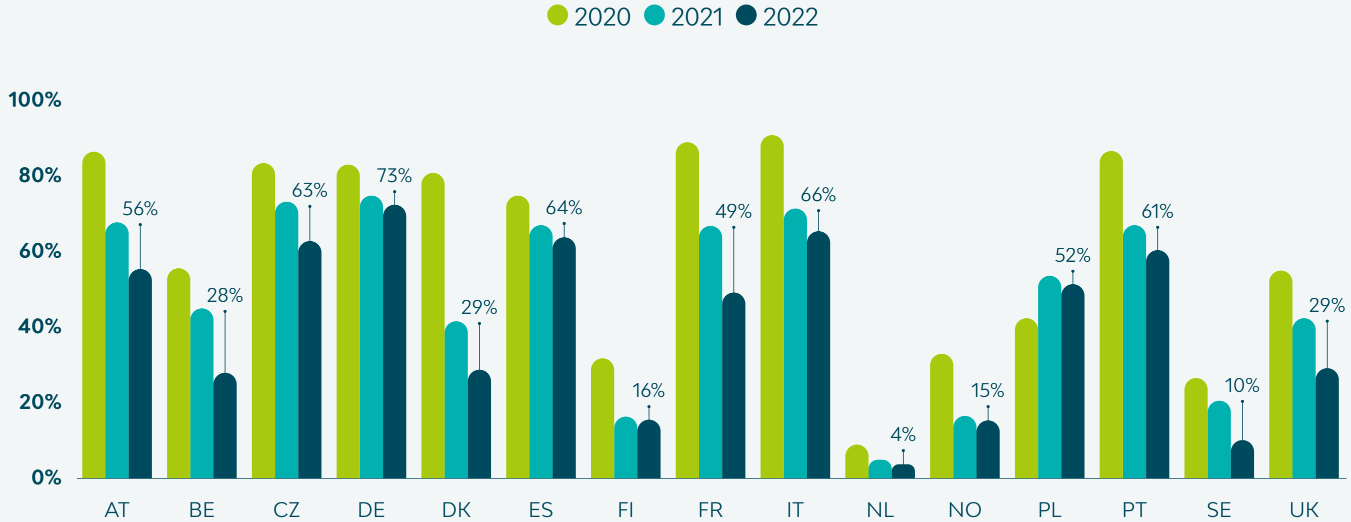
*Only countries are shown here with at least 100 renewals each year to ensure a representative sample size

The shift away from diesel can be seen in all countries, except for Poland

Share of petrol per country* 2020-2022



Share of diesel per country*, 2020-2022



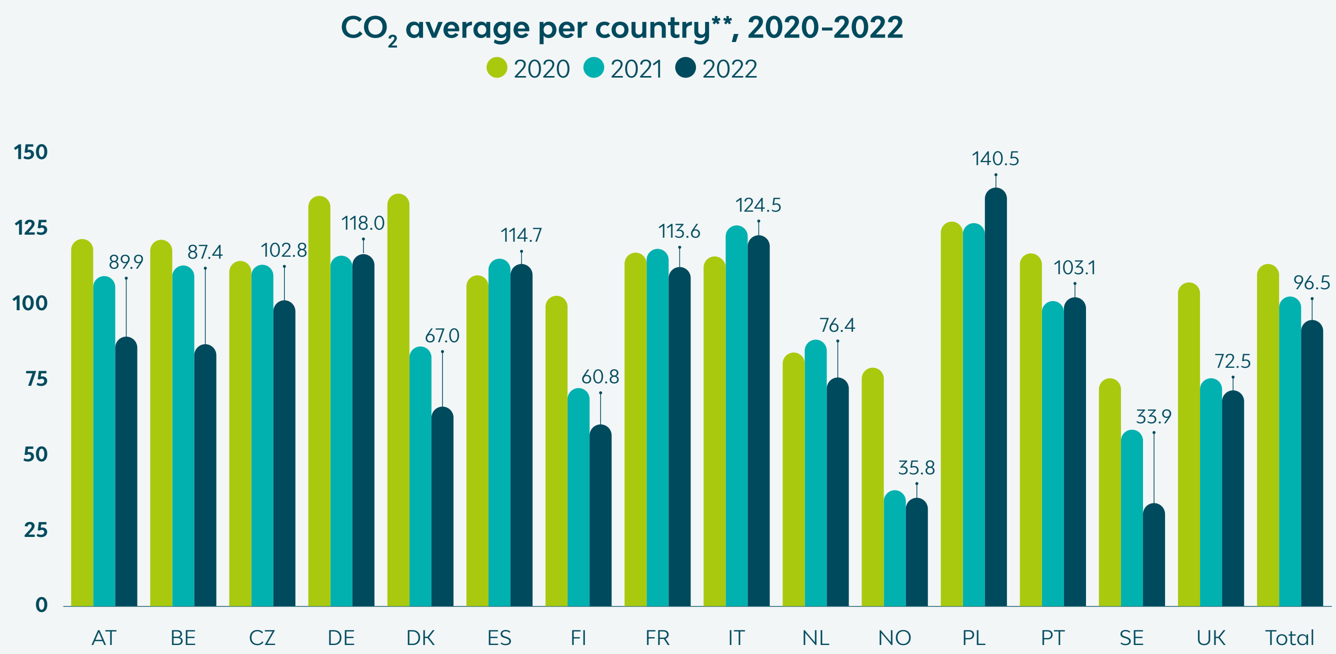
The Netherlands has the lowest share of diesel at 4%.

In **Germany,** the share of diesel is still the largest with 73%.

The Netherlands has the largest share of petrol with 36%, but it has declined significantly in the last two years.

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

Since 2020, the Industrial industry was able to lower average CO_2 emissions by 18.3 g/km to 96.5 g/km.



Poland has the highest average CO_2 emissions* at 140.5 g/km, higher than in 2020.

Sweden has the lowest average CO_2 emissions at 33.9 g/m due to the surge in BEV and PHEV adoption.

*Based on car manufacturers (OEM) reported CO_2
**Only countries are shown here with at least 100 renewals each year to ensure representative statistics

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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