Automotive industry benchmark

2026

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Contents:

Introduction

In this industry benchmark report, the most important fleet trends for automotive industry fleets in Europe are highlighted, by comparing passenger car registrations between 2023 and 2025.

The following definition of the automotive industry has been applied: Companies operating in the vehicle-development supply chain including OEMs and aftermarket companies (excluding rental companies).

This analysis of fleet trends is based on Ayvens passenger car data from international automotive companies. For the scope and to ensure the data is representative, only countries where at least 100 passenger cars were renewed within the industry each year (2023, 2024 & 2025) have been included.

If you would like to know how sustainable this industry compared to other industries, please check out our Sustainable Industry Fleet Ranking 2026.

Key findings:

The share of diesel vehicles has declined across all surveyed markets, while petrol adoption has also decreased significantly in most countries. Electrified powertrains now account for the majority of new automotive fleet registrations

Battery electric vehicles have seen the largest growth of all powertrains, increasing from 13% of new vehicle registrations in 2023 to 38% in 2025 and becoming the leading powertrain in automotive fleets.

CO_2 emissions have decreased substantially since 2023, driven by growing BEV adoption. Belgium and the United Kingdom recorded the lowest average CO_2 emissions in 2025, while Poland remains the highest-emitting market.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
C1	14%	C1	21%	SUV-C1	20%
SUV-C1	14%	SUV-C1	18%	SUV-D1	15%
D2	14%	SUV-C2	11%	SUV-C2	10%
SUV - D1	12%	D2	10%	SUV-D2	10%
SUV - C2	11%	SUV-D1	10%	D2	8%
SUV - D2	9%	SUV D-2	10%	C1	7%
D1	5%	D1	5%	E2	7%
B1	4%	B1	3%	D1	6%
SUV-B1	4%	SUV-B2	2%	SUV-B1	4%
E2	2%	E2	2%	B1	3%

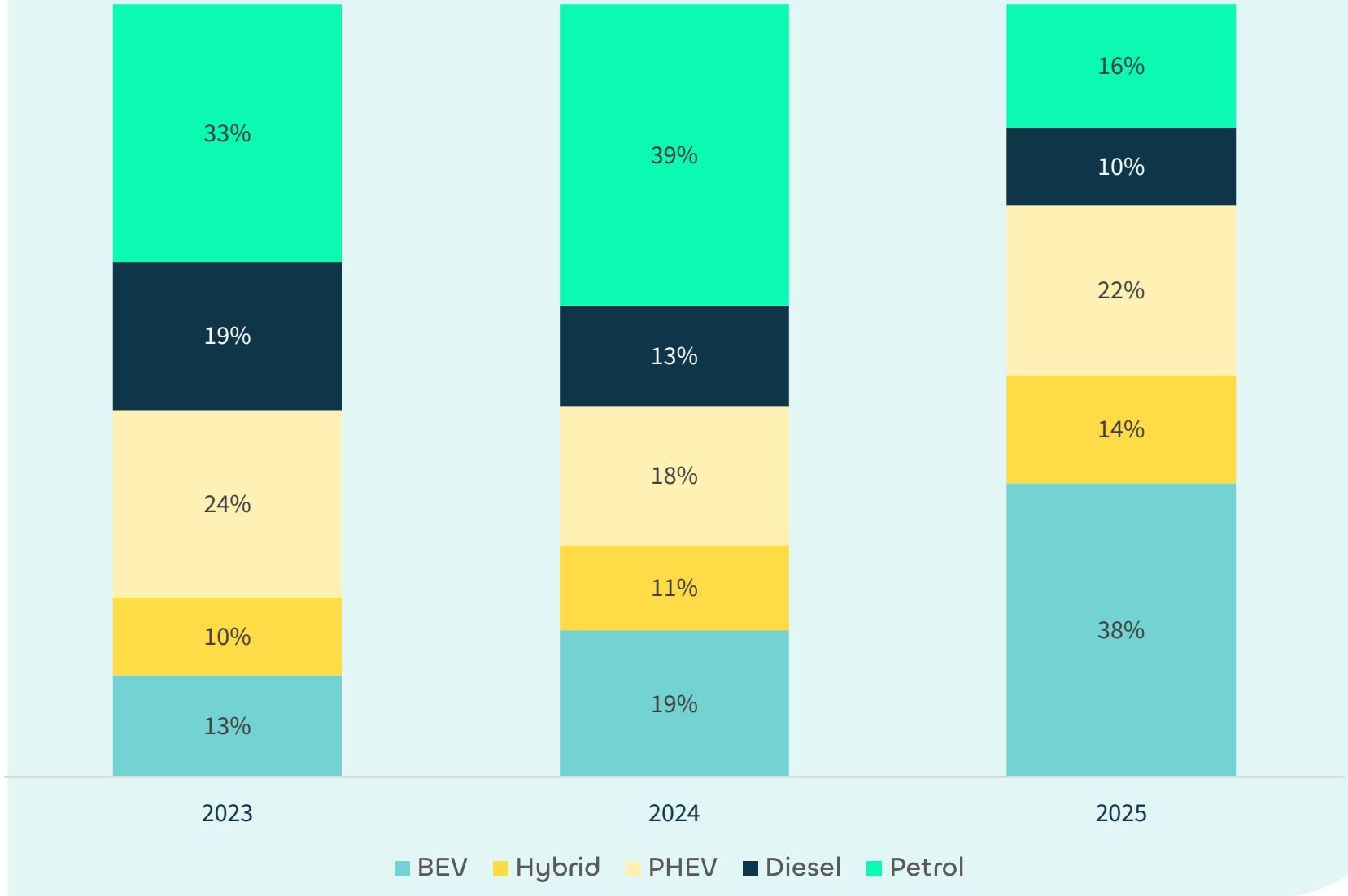
Most popular car segment: SUV-C1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
VOLVO XC40	5%	PEUGEOT 308	14%	RENAULT SCENIC	5%
VOLVO XC60	4%	RENAULT ARKANA	8%	PEUGEOT 308	4%
RENAULT MEGANE	4%	VOLVO XC60	4%	RENAULT SYMBIOZ	4%
FORD KUGA	4%	VOLVO V60	4%	PEUGEOT 3008	4%
KIA CEED	4%	RENAULT AUSTRAL	3%	VOLVO XC60	3%
RENAULT CLIO	3%	BMW X1	2%	VOLVO EX40	3%
MERCEDES CLASS A	3%	VOLVO XC40	2%	BMW I4	2%
VOLVO V60	3%	SKODA OCTAVIA	2%	TESLA MODEL Y	2%
SKODA OCTAVIA	3%	VOLVO EX30	2%	SKODA KODIAQ	2%
RENAULT ARKANA	3%	ALFA ROMEO TONALE	2%	VOLVO EX30	2%

Most popular car:
RENAULT SCENIC

Battery electric vehicles become the leading powertrain in automotive fleets

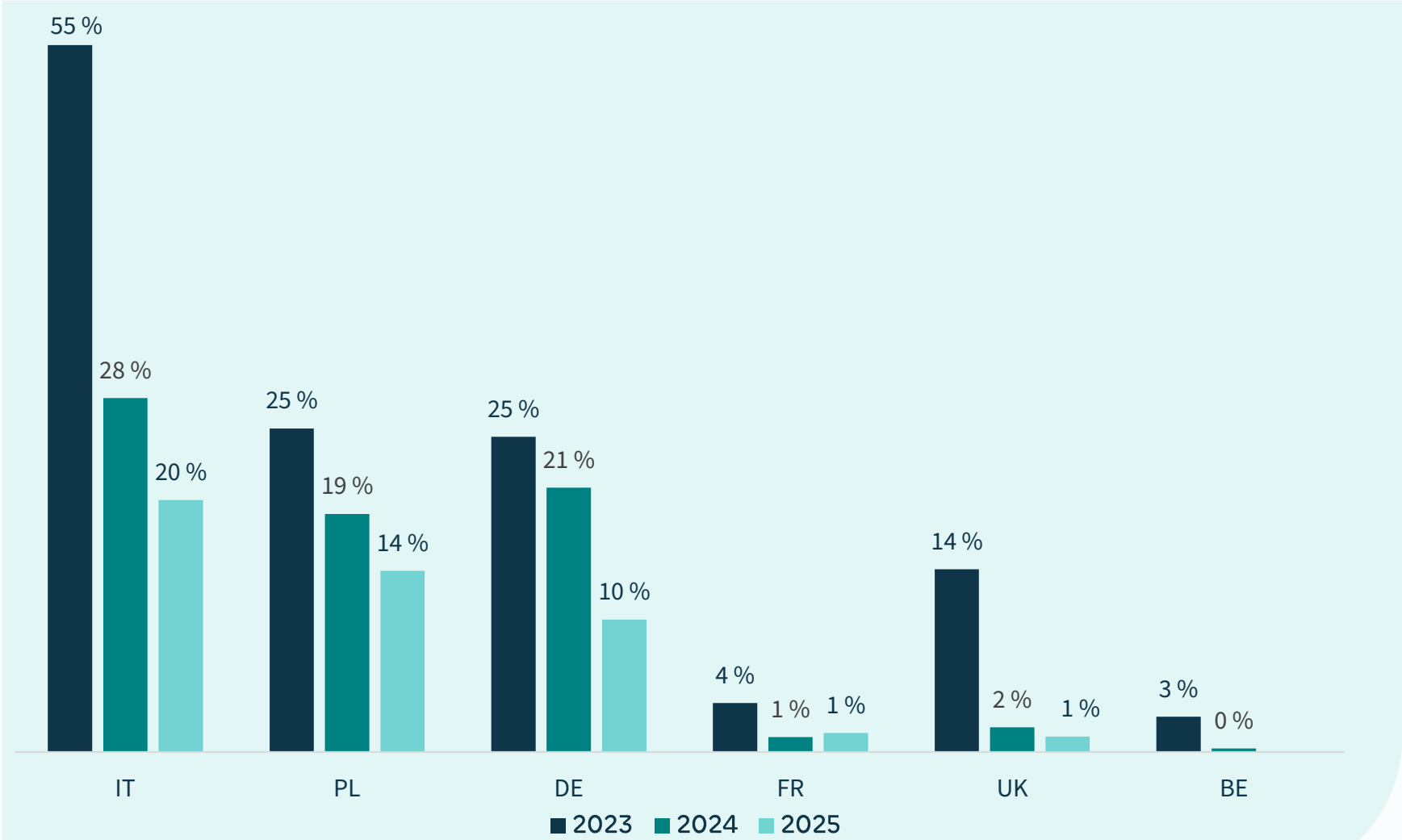


Battery electric vehicles have become the leading powertrain, reaching 38% of the fleet in 2025.

Petrol has seen the most significant decline, falling from 39% in 2024 to 16% in 2025.

Hybrid and plug-in hybrid vehicles continue to gain share, while diesel adoption keeps decreasing year over year.

Diesel adoption continues to decline across automotive fleets

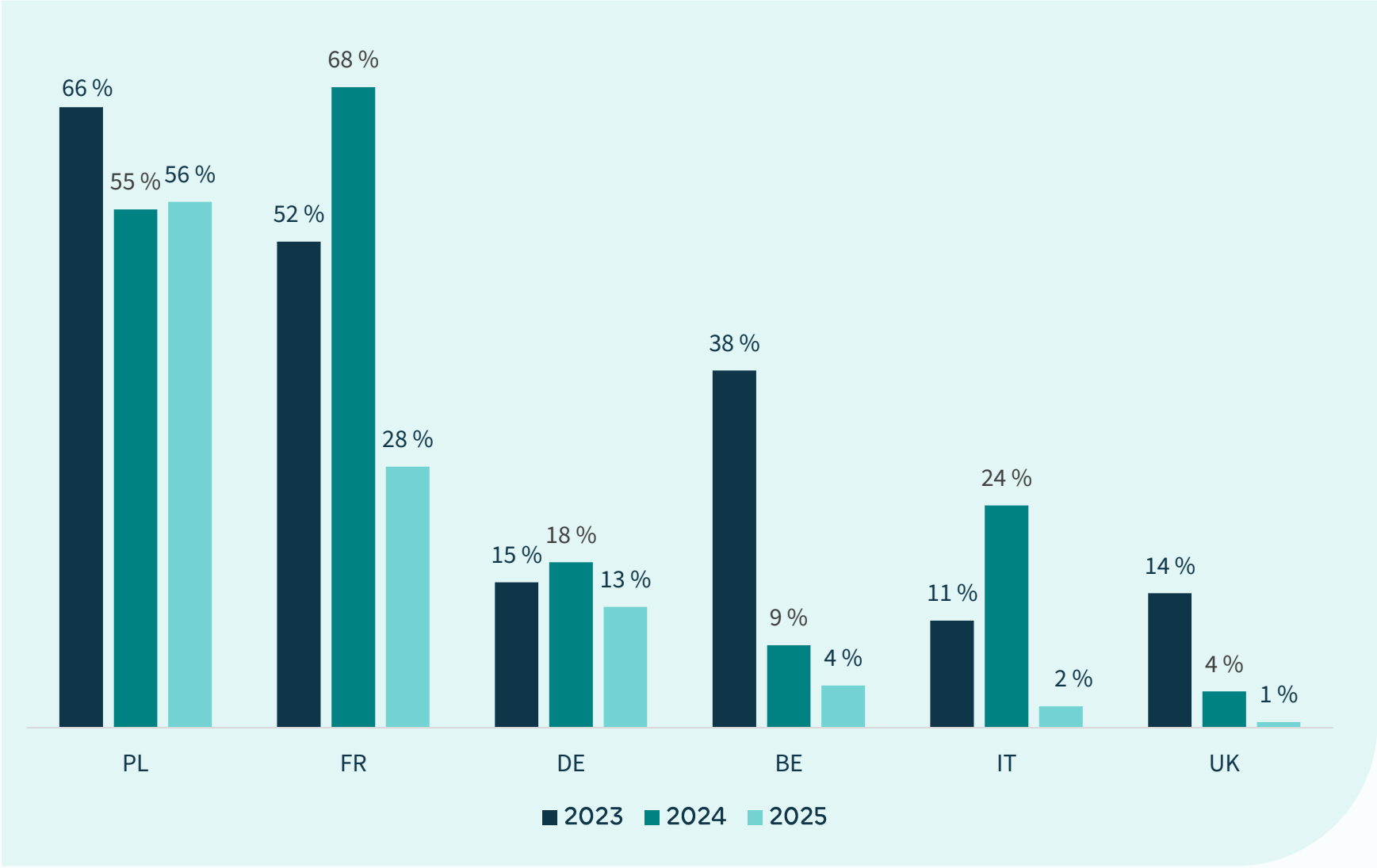


Automotive fleets in all surveyed markets have reduced their share of new diesel vehicles compared to 2023.

Italy and Poland continue to have the highest diesel shares, although both markets have seen significant declines over the period.

Belgium, France and the United Kingdom have nearly phased out diesel in new fleet registrations, with diesel accounting for 1% or less of vehicles in 2025.

Petrol remains dominant in Poland despite an overall downward trend

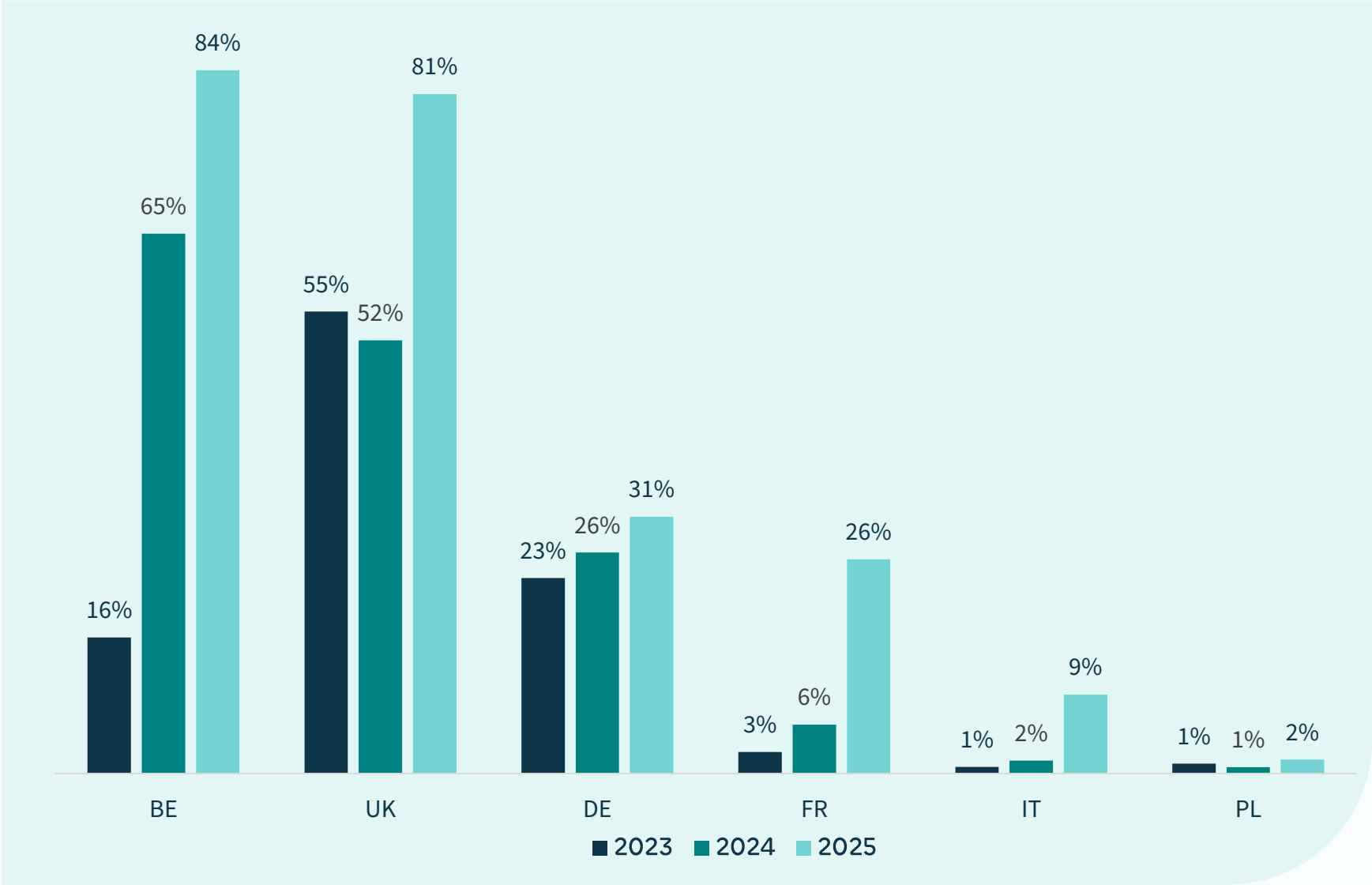


The share of new petrol vehicles has decreased in most automotive markets since 2023, particularly in Belgium, France, Italy and the United Kingdom.

Poland continues to have the highest petrol share among the surveyed countries, with petrol accounting for 56% of new fleet vehicles in 2025.

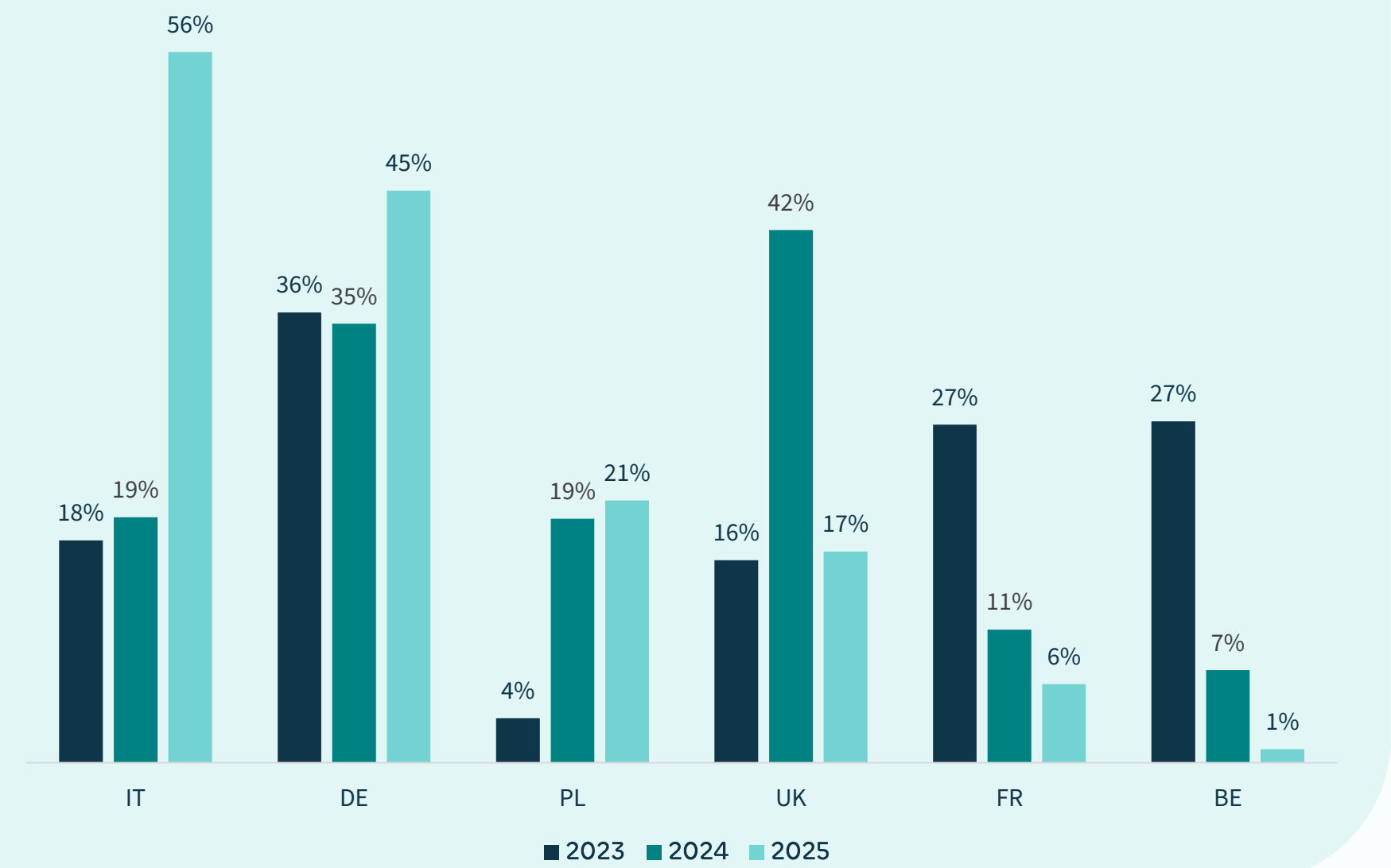
Germany has remained relatively stable over the period, while France and Italy have seen the largest declines in petrol adoption since 2024.

BEV adoption accelerates across automotive fleets



Belgium and the United Kingdom continue to lead BEV adoption in automotive fleets, with battery electric vehicles accounting for over 80% of new vehicles in 2025.

Plug-in hybrid adoption grows, led by Italy and Germany

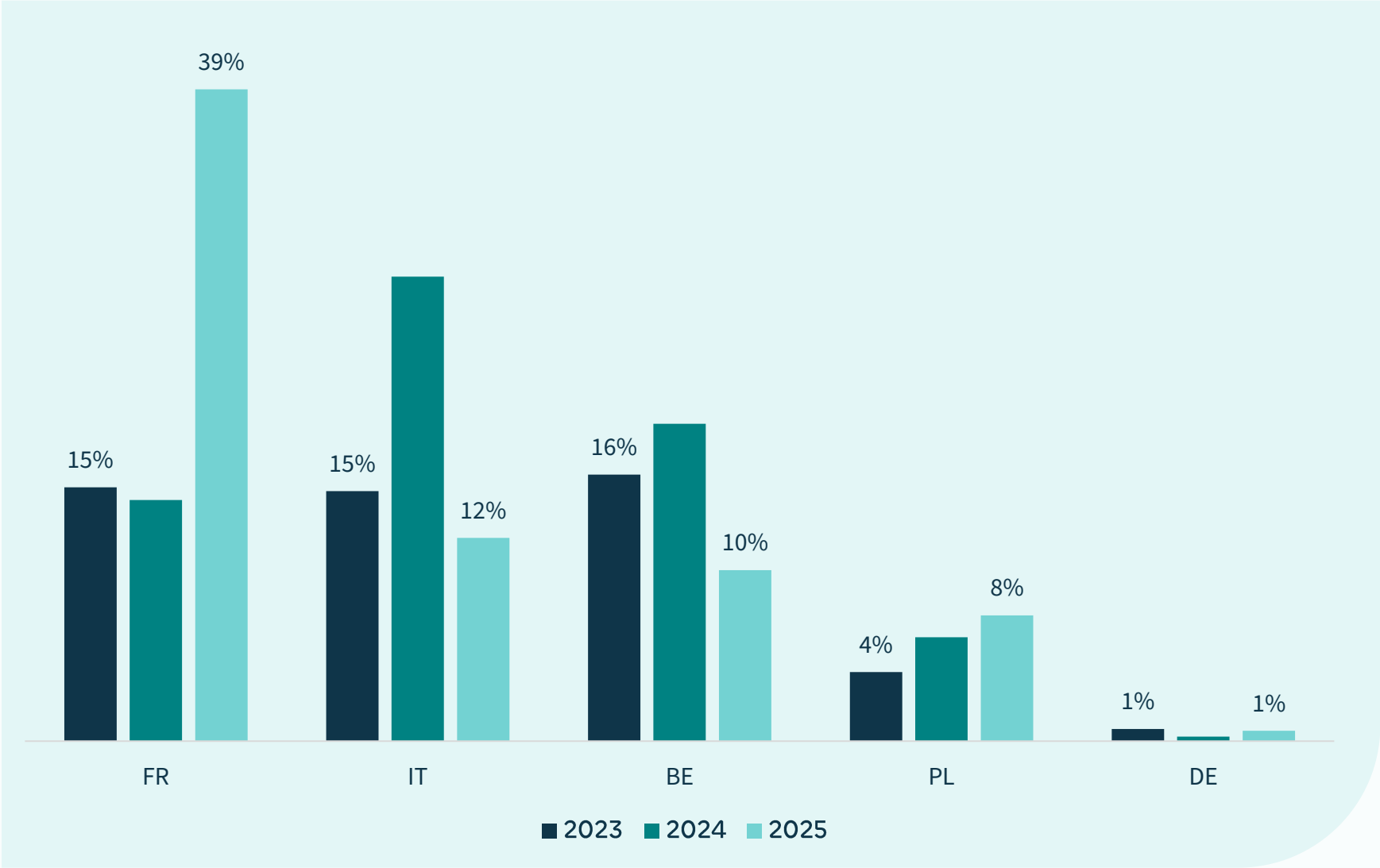


Germany, Italy and Poland have seen strong growth in the share of plug-in hybrid vehicles (PHEVs) since 2023.

Italy has the highest PHEV share among the surveyed markets, with plug-in hybrids accounting for 56% of new vehicles in 2025.

In contrast, Belgium and France have experienced significant declines in PHEV adoption, while the UK remains broadly stable over the period.

Hybrid adoption remains uneven across automotive markets



Hybrid vehicle adoption varies significantly across automotive fleets, with France emerging as the leading market in 2025.

France has seen the strongest growth in hybrid adoption, increasing from 15% in 2023 to 39% in 2025.

Belgium and Italy have recorded declines in hybrid share since 2024, while Germany and Poland continue to show relatively low levels of hybrid adoption.

CO_2 emissions continue to decline across automotive fleets

Most automotive markets have achieved substantial reductions in average CO_2 emissions since 2023, reflecting the growing adoption of electrified vehicles.

Belgium and the United Kingdom recorded the largest decreases, with average CO_2 emissions falling to 16 g/km and 8 g/km respectively in 2025.

Despite improvements across all markets, Poland continues to have the highest average CO_2 emissions, at 119 g/km in 2025, while France was the only country to see a temporary increase between 2023 and 2024 before improving in 2025.

Vehicle segments

Volume cars (1)

Subcompact cars (B)

B1 - Renault 5

SUV-B1 Peugeot 2008

Compact cars (C)

C1 – Renault Megane

SUV-C1 – KIA EV3

Midsized cars (D)

D1 – Tesla Model 3

SUV-D1 – Tesla Model Y

Full-size cars (E)

BYD HAN

KIA EV9

Premium cars (2)

B2 – Mini Cooper

SUV-B2 – VOLVO EX30

C2 – Mercedes Class A

SUV-C2 – VOLVO EX40

D2 – Polestar 2

SUV D2 – Polestar 3

E2 – Polestar 4

E2 – VOLVO EX90

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'

Appendix: definition of industries

Automotive:	Companies operating in the vehicle-development supply chain including OEMs and aftermarket companies (no rental companies)
Construction:	Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure development supply chain.
Consumer Goods:	Companies developing or selling consumer products (FMCGs, retailers, etc).
Energy & Chemicals:	Companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals.
Financial & Professional Services:	Companies offering financial products (banks, insurers, etc) or professional services (accountancy and consultancy.
Healthcare:	Companies that provide services for diagnosing, preventing, treating and curing health conditions.
Industrial:	Companies producing or maintaining physical material or products for the B2B sector.
Pharmaceutical:	Companies involved in developing, producing and distributing pharmaceutical products.
Technology:	Companies primarily involved in the development of hardware or software products.
Transport:	Industry that provides services to transport people or goods.

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