Construction industry benchmark

2026

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Contents:

Introduction

In this industry benchmark report, the most important fleet trends for construction industry fleets in Europe are highlighted, by comparing passenger car registrations between 2023 and 2025. The following definition of the construction industry has been applied:
Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure development supply chain.

This analysis of fleet trends is based on Ayvens passenger car data from international construction 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:

Diesel and petrol vehicle adoption continues to decline overall, although diesel remains the dominant powertrain in several markets including Switzerland, Germany, Poland and the Czech Republic.

Battery electric vehicles have seen the largest growth of all powertrains, increasing from 33% of new vehicle registrations in 2023 to 47% in 2025 and reinforcing their position as the leading powertrain in construction industry fleets.

CO_2 emissions have decreased substantially since 2023, driven by increasing BEV adoption. Belgium recorded the lowest average CO_2 emissions in 2025, while Switzerland, the Czech Republic and Poland remain among the highest-emitting construction fleet markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
C1	19%	SUV - C1	20%	C1	20%
SUV - D1	16%	C1	17%	SUV - C1	19%
SUV - B1	16%	SUV - B1	15%	SUV – B1	13%
SUV - C1	16%	SUV - D1	14%	SUV-D1	11%
B1	8%	SUV – C2	8%	D1	8%
D1	7%	D1	7%	B1	7%
SUV - C2	6%	B1	5%	SUV – C2	6%
SUV - D2	4%	D2	4%	D2	3%
D2	4%	SUV – D2	4%	SUV – D2	3%
C2	2%	MPV – C1	1%	SUV – B2	2%

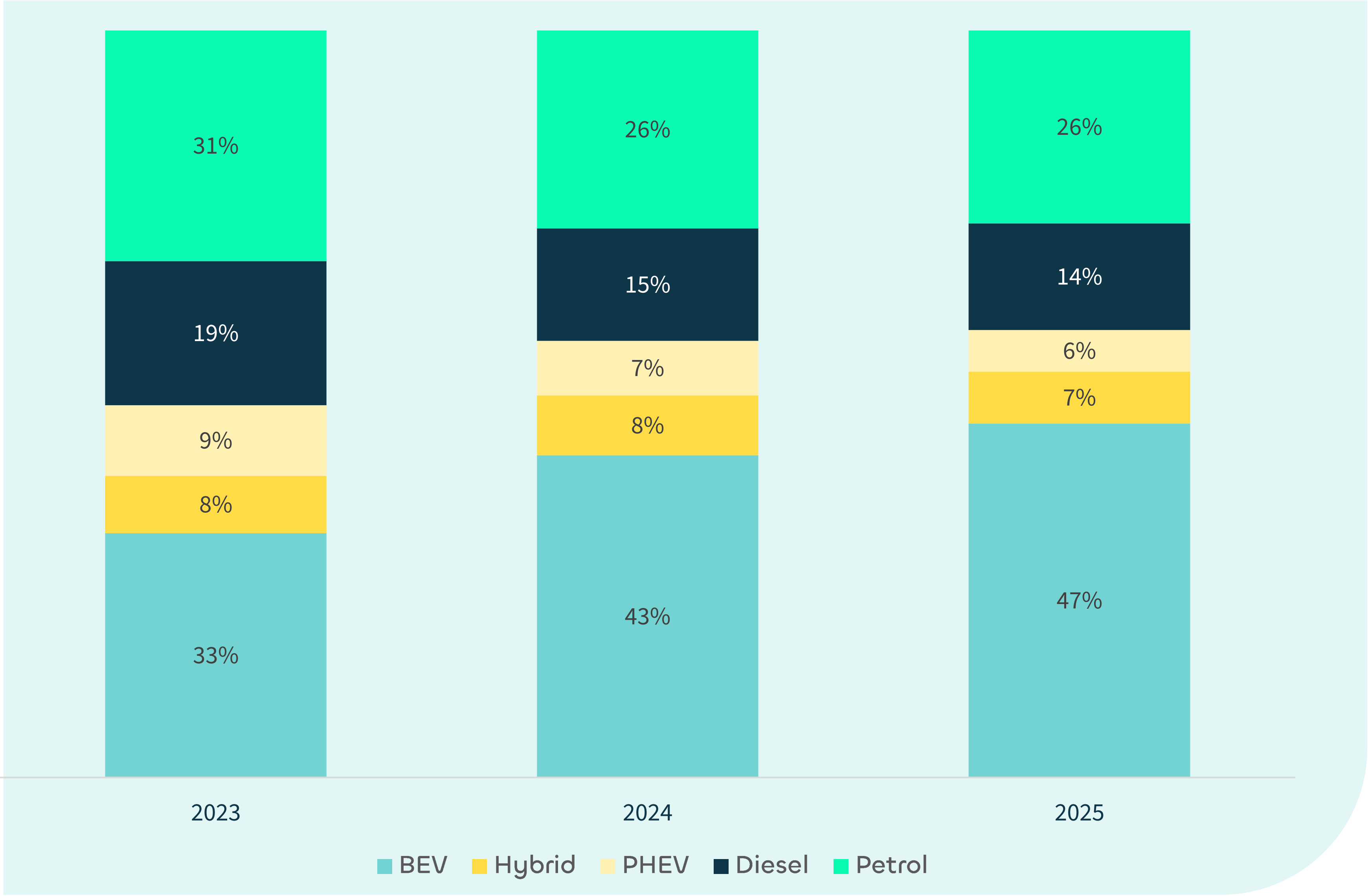
Most popular car segment: C1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
PEUGEOT 2008	8%	PEUGEOT 2008	12%	PEUGEOT 2008	9%
PEUGEOT 308	6%	PEUGEOT 308	7%	PEUGEOT 308	9%
PEUGEOT 208	5%	VOLKSWAGEN GOLF	4%	CUPRA BORN	3%
RENAULT MEGANE E-TECH	5%	JEEP AVENGER	4%	RENAULT SCENIC	3%
CITROEN C3	4%	KIA NIRO	4%	PEUGEOT 3008	3%
PEUGEOT 3008	3%	SKODA ENYAQ	3%	SKODA OCTAVIA	3%
CITROEN C5 AIRCROSS	3%	PEUGEOT 3008	3%	PEUGEOT 208	3%
KIA NIRO	3%	SKODA OCTAVIA	3%	RENAULT CAPTUR	3%
AUDI Q4 E-TRON	3%	TESLA MODEL 3	2%	JEEP AVENGER	2%
TESLA MODEL Y	3%	AUDI Q4 E-TRON	2%	VOLKSWAGEN GOLF	2%

Most popular car:
PEUGEOT 2008

BEVs strengthen their lead as the dominant powertrain

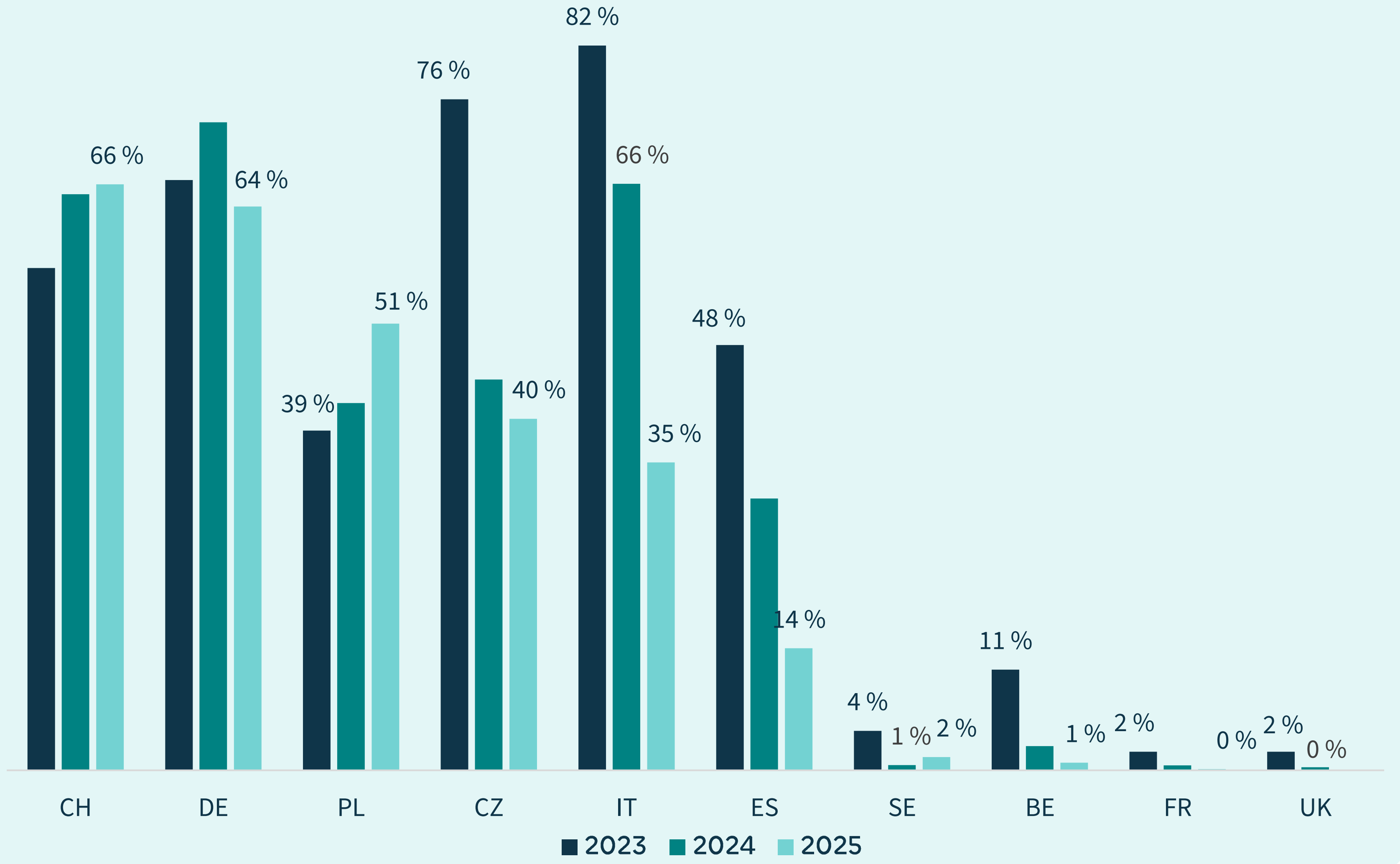


Battery electric vehicles have seen the largest growth of all powertrains, increasing from 33% of new vehicle registrations in 2023 to 47% in 2025.

Diesel and petrol vehicles continue to decline in construction industry fleets, although petrol remains the second most common powertrain.

Hybrid and plug-in hybrid vehicle shares have remained relatively stable, while the shift towards BEVs continues to reduce fleet emissions.

Diesel adoption remains highest in Central and Southern European construction fleets

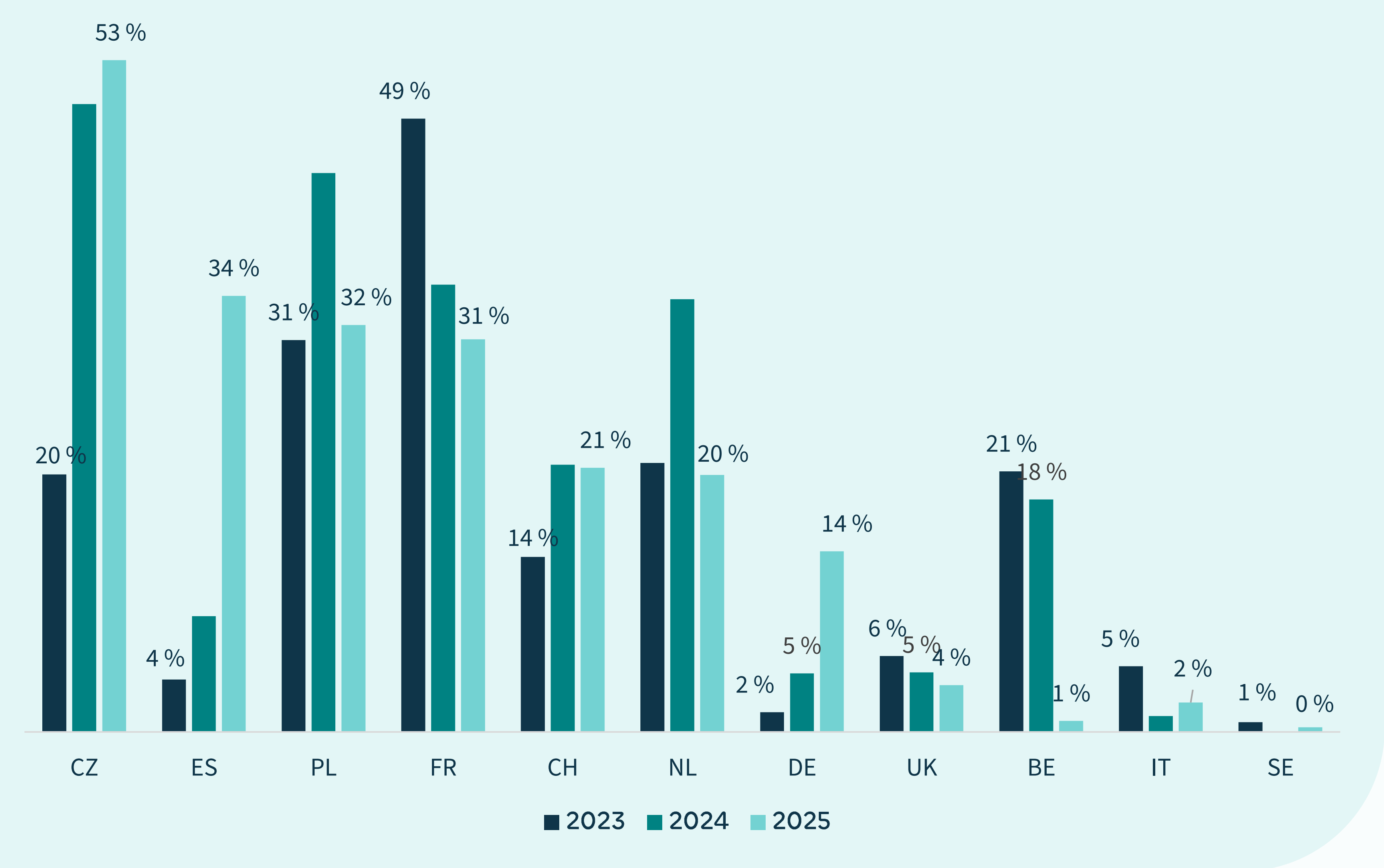


Construction fleets in the Czech Republic, Germany, Italy and Switzerland continue to have the highest shares of new diesel vehicles, despite declining adoption in most markets since 2023.

Italy and Spain have seen the largest reductions in diesel share, while Poland and Switzerland are the only countries to record growth since 2023.

In 2025, diesel accounted for 66% of new vehicles in Swiss construction fleets, making Switzerland the most diesel-dependent market among the surveyed countries.

Petrol adoption shows mixed trends across construction industry fleets

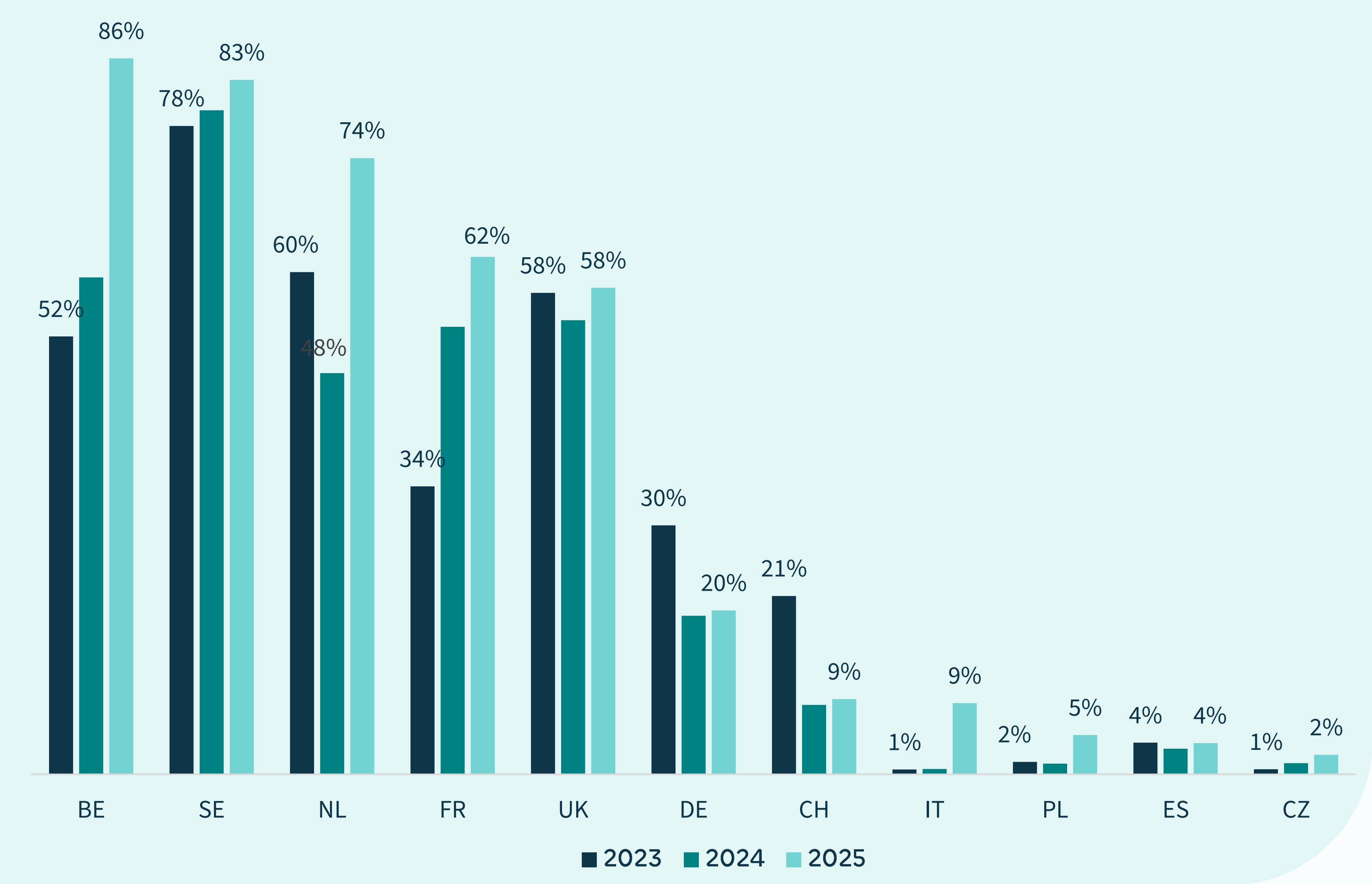


The share of petrol vehicles varies significantly across construction fleets, with the Czech Republic and Spain recording the highest petrol adoption in 2025.

Spain has seen the strongest growth in petrol vehicles, increasing from 4% in 2023 to 34% in 2025, while Germany has also recorded notable growth over the period.

Belgium, France and the United Kingdom have experienced declining petrol shares, while Sweden continues to have virtually no petrol vehicles in new fleet registrations.

BEV adoption continues to accelerate in construction industry fleets

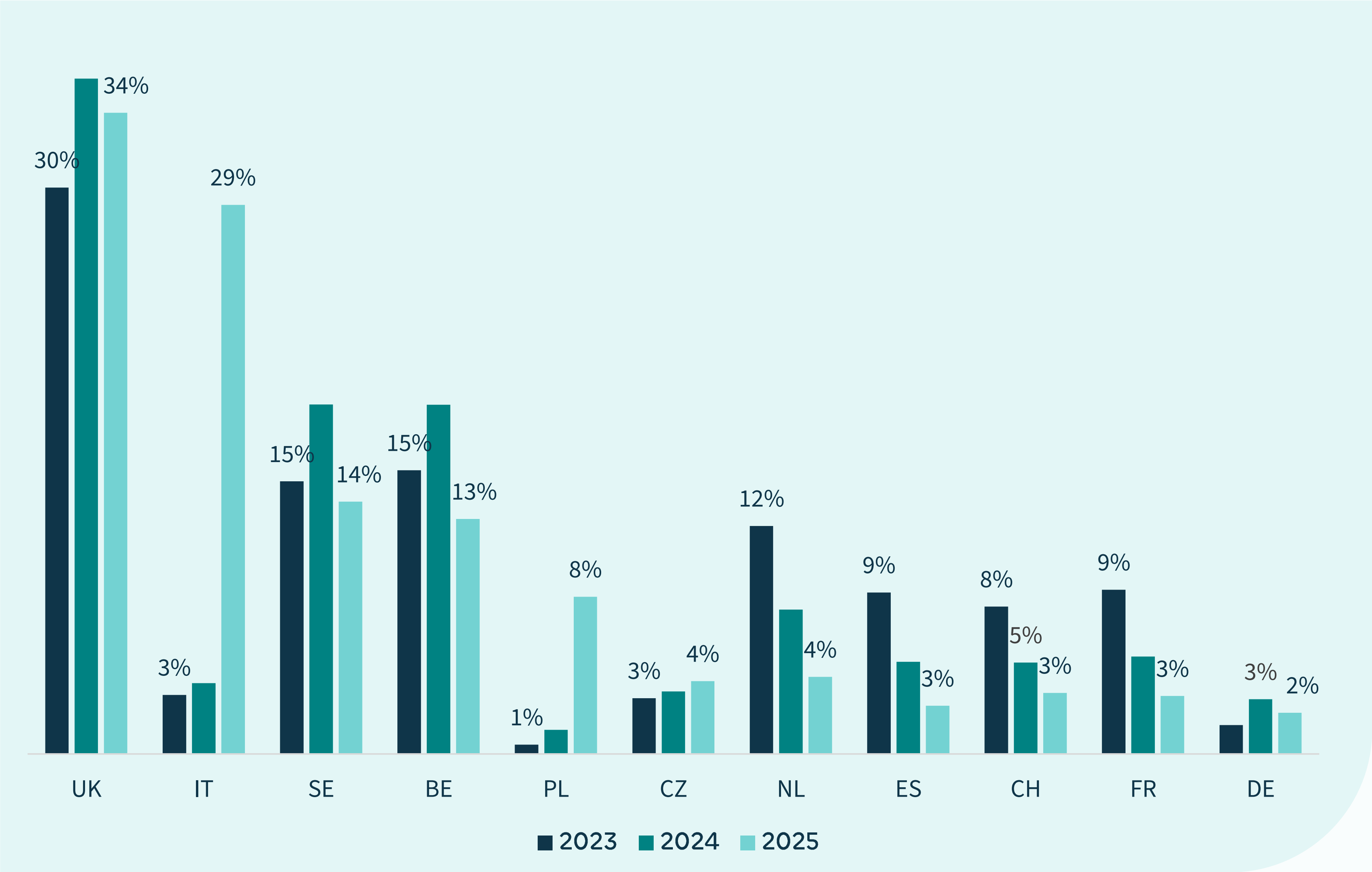


Belgium, Sweden, the Netherlands and France continue to lead the transition to battery electric vehicles, with more than half of new fleet registrations being BEVs in 2025.

Belgium has seen the strongest growth in BEV adoption, increasing from 52% in 2023 to 86% in 2025, while France and the Netherlands have also recorded substantial gains.

BEV uptake remains very limited in the Czech Republic, Poland, Spain and Italy, where battery electric vehicles account for less than 10% of new construction fleet vehicles in 2025.

UK and Italy lead plug-in hybrid adoption, while Sweden and Belgium maintain strong positions

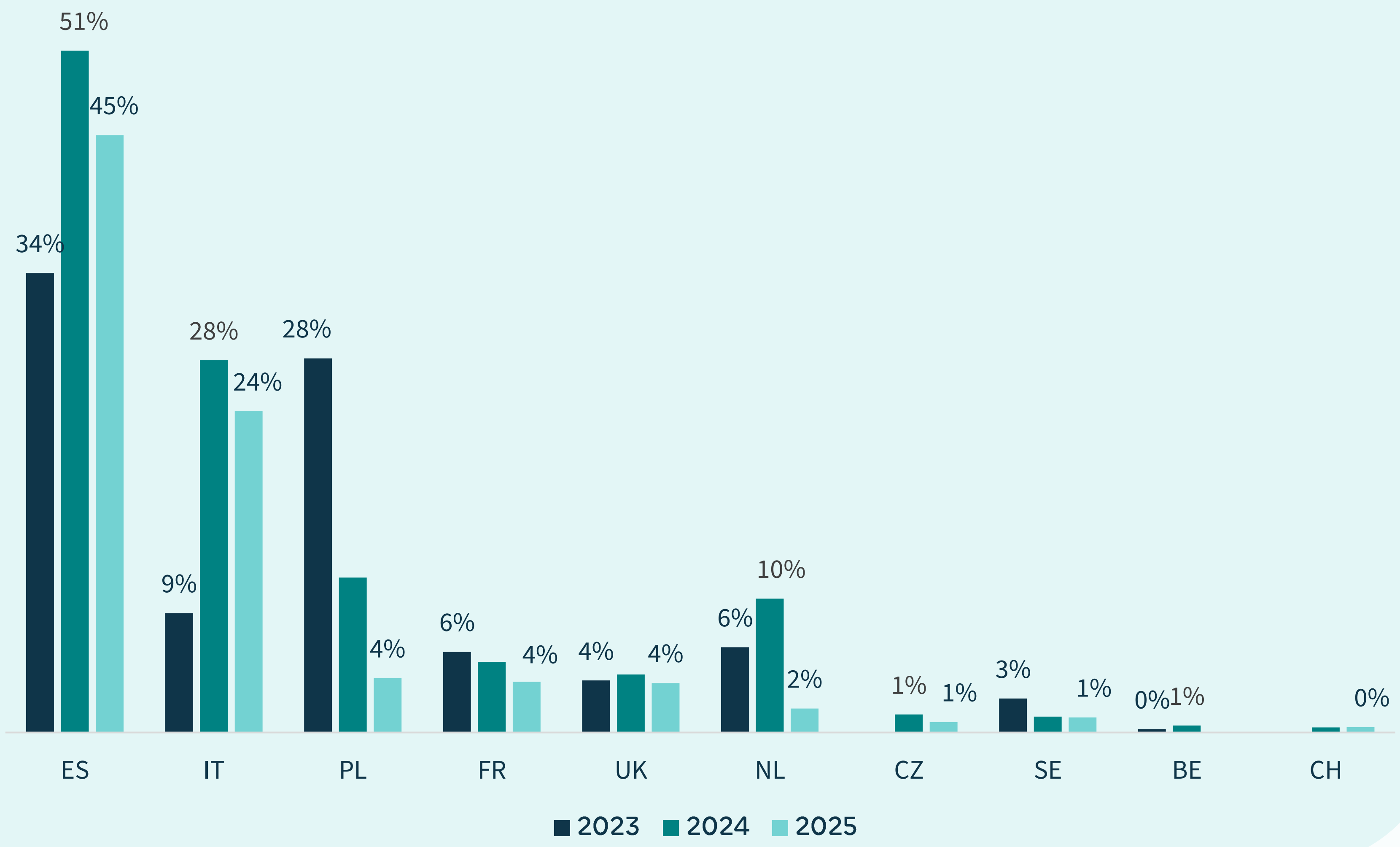


The UK and Italy have seen the strongest growth in plug-in hybrid vehicle adoption since 2023, with Italy recording the most significant increase among all surveyed markets.

The UK leads all markets in 2025, with PHEVs accounting for 34% of new vehicles, followed by Italy at 29%.

In contrast, the Netherlands, France and Spain have experienced notable declines in PHEV adoption since 2023.

Spain leads hybrid adoption in construction industry fleets

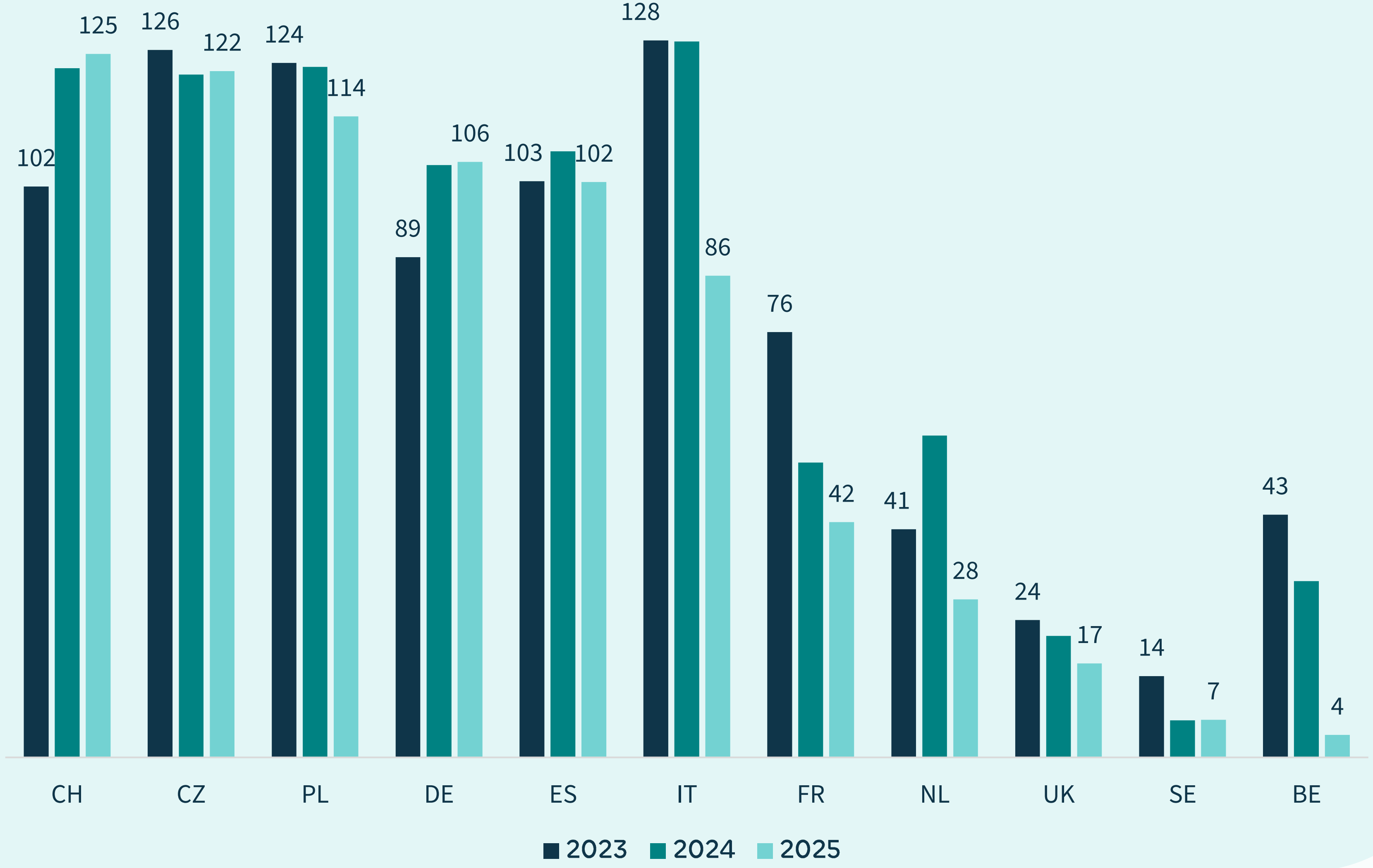


Hybrid vehicle adoption remains limited in most construction industry fleets, with Spain continuing to lead the market by a significant margin.

Spain has the highest share of hybrid vehicles, reaching 45% of new registrations in 2025, while Italy is the only other market with a hybrid share above 20%.

Most countries have seen stable or declining hybrid adoption since 2023, with Belgium, Switzerland and Sweden recording virtually no hybrid vehicle registrations.

CO_2 emissions continue to decline in construction industry fleets



Average CO_2 emissions have decreased in most construction industry fleets since 2023, reflecting the growing adoption of battery electric vehicles.

Belgium has recorded the largest reduction, with average emissions falling from 43 g/km in 2023 to just 4 g/km in 2025, while the Netherlands, France and Italy have also achieved substantial improvements.

Despite some progress, Switzerland, the Czech Republic and Poland continue to have the highest average CO_2 emissions in 2025, while Belgium, Sweden and the United Kingdom remain the lowest-emitting construction fleet markets.

Vehicle segments

	Volume cars (1)		Premium cars (2)	
Subcompact cars (B)	 B1 - Renault 5	 SUV-B1 Peugeot 2008	 B2 – Mini Cooper	 SUV-B2 – VOLVO EX30
Compact cars (C)	 C1 – Renault Megane	 SUV-C1 – KIA EV3	 C2 – Mercedes Class A	 SUV-C2 – VOLVO EX40
Midsized cars (D)	 D1 – Tesla Model 3	 SUV-D1 – Tesla Model Y	 D2 – Polestar 2	 SUV D2 – Polestar 3
Full-size cars (E)	 BYD HAN	 KIA EV9	 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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