Consumer goods industry benchmark

2026

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Introduction

In this industry benchmark report, the most important fleet trends for consumer goods industry fleets in Europe are highlighted, by comparing passenger car registrations between 2023 and 2025. The following definition of the consumer goods industry has been applied: Companies developing or selling consumer products (FMCGs, retailers, etc.).

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

Consumer goods fleets show significant differences in their transition pathways. While Belgium, the Netherlands and Sweden lead BEV adoption, hybrid vehicles remain the dominant powertrain in markets such as Bulgaria and Italy.

Battery electric vehicles have seen the strongest growth of all powertrains, increasing from 14% of new vehicle registrations in 2023 to 28% in 2025 and becoming the leading powertrain in consumer goods fleets.

CO_2 emissions have decreased substantially in many markets since 2023, driven by increasing electrification. Belgium and Sweden recorded the lowest average CO_2 emissions in 2025, while Croatia and Poland remain the highest-emitting consumer goods fleet markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
C1	21%	SUV - C1	20%	SUV - C1	20%
SUV - C1	19%	SUV – D1	17%	SUV - D1	15%
SUV - D1	15%	C1	16%	C1	12%
D1	8%	SUV – C2	10%	D1	11%
SUV - C2	7%	D1	7%	SUV – C2	10%
B1	6%	B1	7%	SUV - B1	6%
SUV – B1	6%	SUV – D2	5%	D2	6%
D2	6%	D2	5%	SUV – D2	5%
SUV-D2	4%	SUV – B1	5%	B1	5%
C2	2%	C2	2%	E2	3%

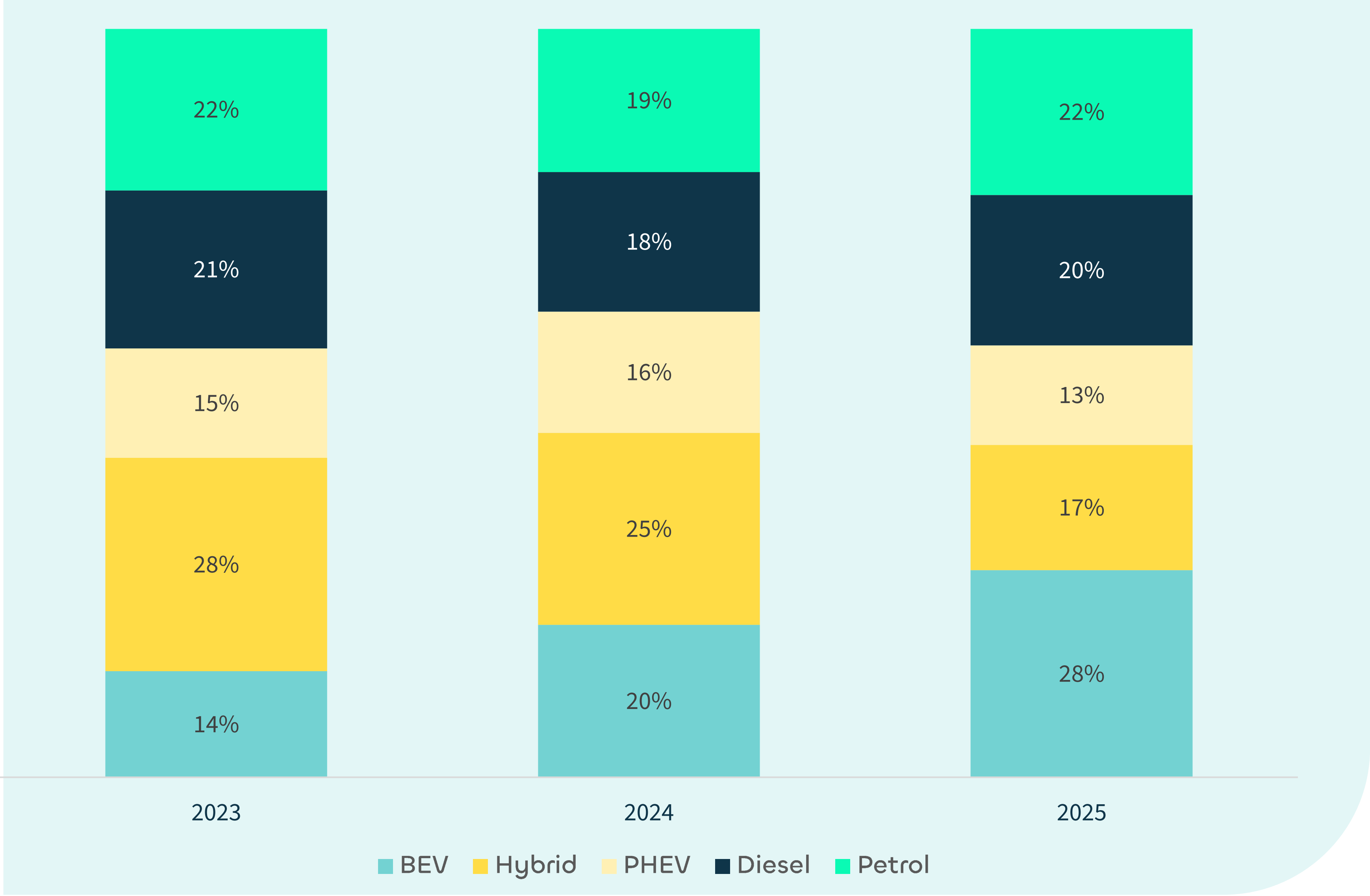
Most popular car segment: SUV - C1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
TOYOTA COROLLA	9%	TOYOTA COROLLA	6%	SKODA OCTAVIA	6%
RENAULT MEGANE	4%	SKODA OCTAVIA	4%	TOYOTA COROLLA	5%
RENAULT ARKANA	3%	BMW X1	3%	VOLKSWAGEN TIGUAN	4%
RENAUL CLIO	3%	KIA NIRO	3%	BMW X1	3%
TOYOTA RAV4	3%	VOLKSWAGEN TIGUAN	3%	VOLKSWAGEN PASSAT	3%
SKODA OCTAVIA	3%	VOLKSWAGEN GOLF	3%	PEUGEOT 3008	3%
VOLVO XC40	3%	SKODA ENYAQ	3%	SKODA KODIAQ	3%
VOLKSWAGEN GOLF	3%	RENAULT CLIO	3%	RENAULT CLIO	3%
FORD KUGA	2%	RENAULT ESPACE	2%	BMW iX1	2%
PEUGEOT 3008	2%	BMW iX1	2%	BMW3 SERIES	2%

Most popular car:
SKODA OCTAVIA

BEVs emerge as the leading powertrain in consumer goods fleets

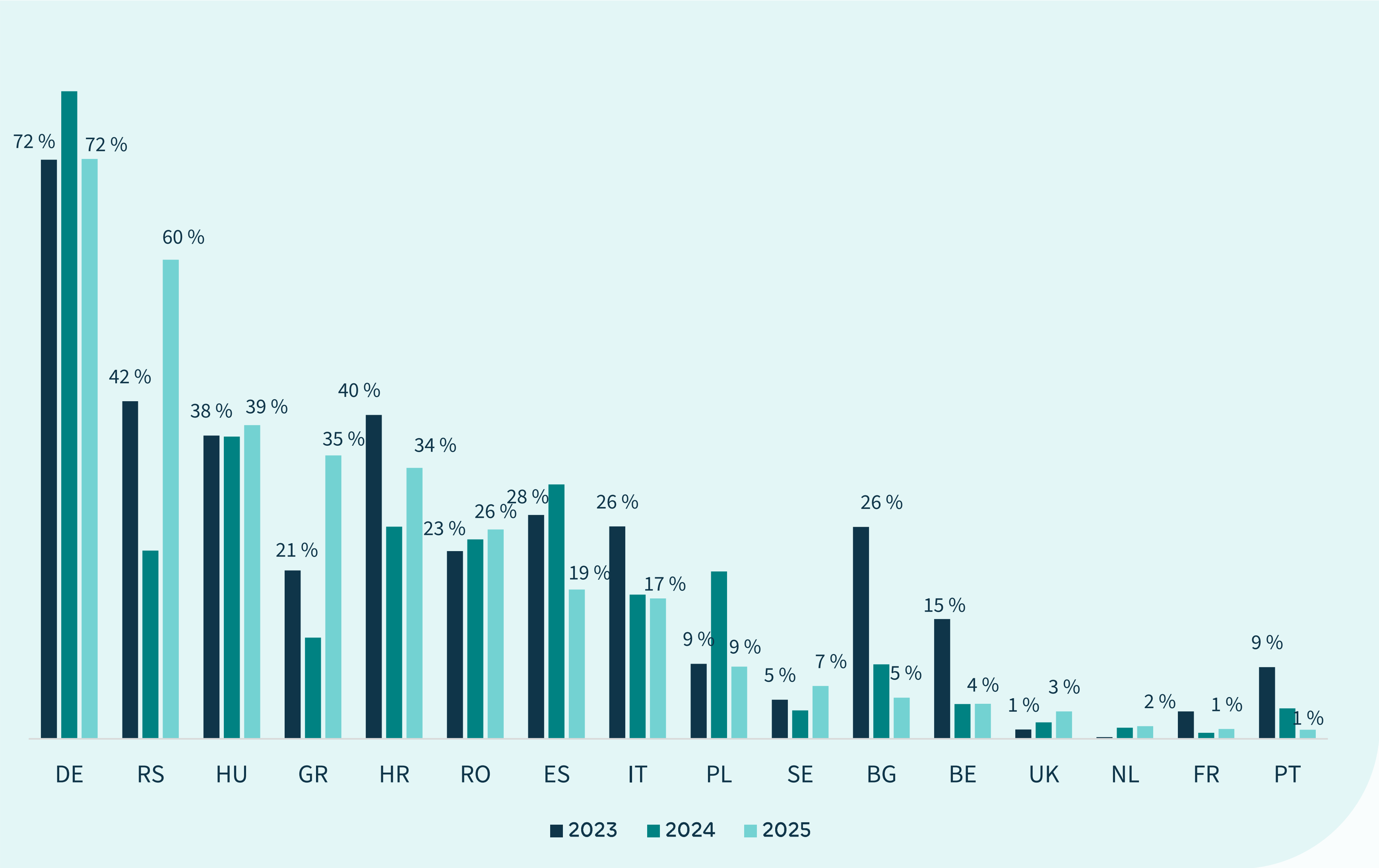


Battery electric vehicles have seen the strongest growth of all powertrains, doubling their share from 14% in 2023 to 28% in 2025 and becoming the leading powertrain in consumer goods fleets.

Hybrid and plug-in hybrid vehicles have lost share since 2023, while diesel and petrol adoption have remained relatively stable over the period.

By 2025, electrified powertrains (BEV, Hybrid and PHEV) accounted for 58% of all new vehicle registrations, highlighting the continued shift towards lower-emission fleets.

Diesel declines across most consumer goods fleets, but remains dominant in Germany

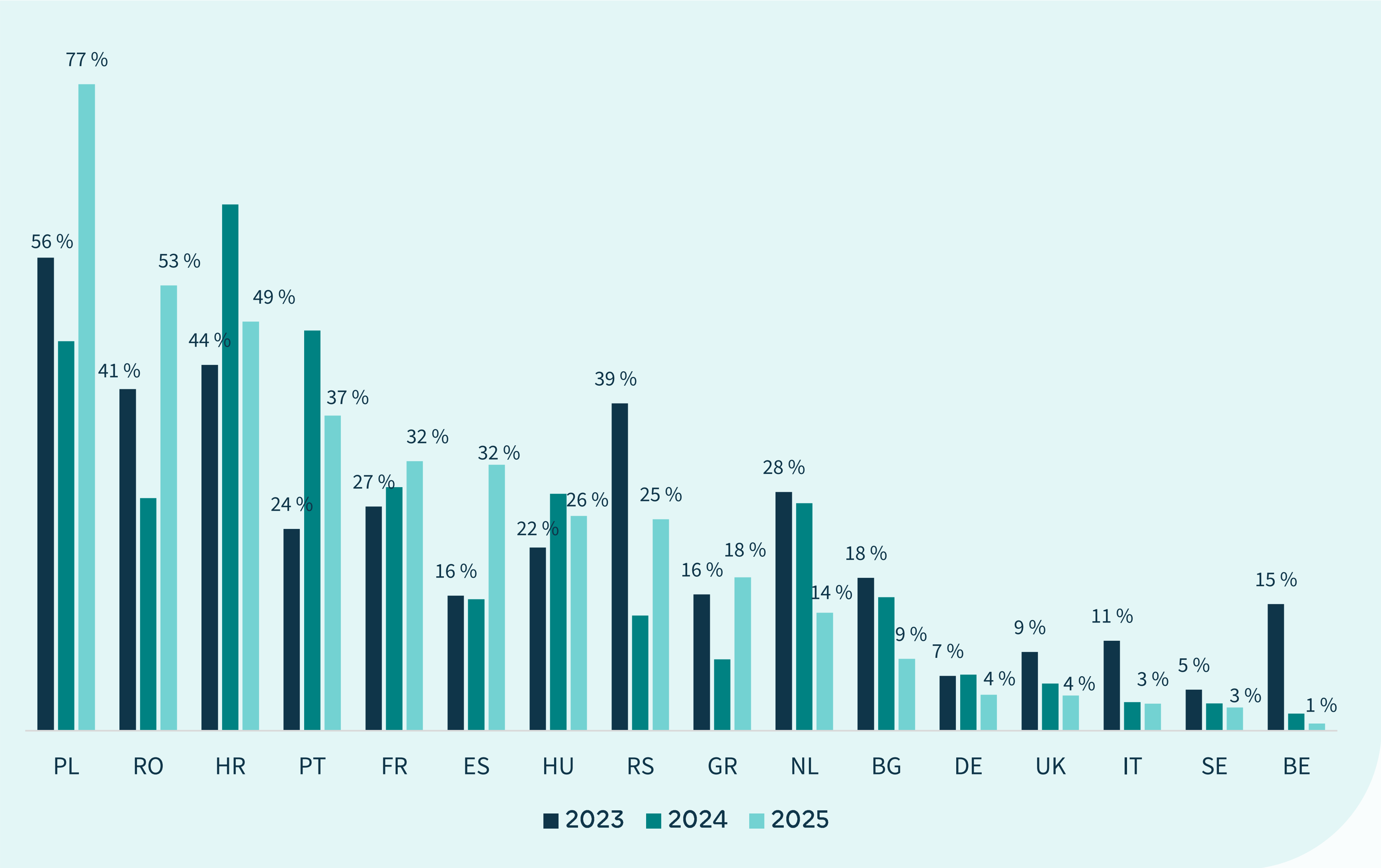


Consumer goods fleets in most countries have reduced their reliance on diesel vehicles since 2023.

Germany remains the most diesel-dependent market, while Serbia has recorded the largest increase in diesel adoption over the period.

Portugal, France, Sweden and the Netherlands continue to report very low shares of new diesel vehicles in fleet registrations.

Petrol adoption remains highly fragmented across consumer goods fleets

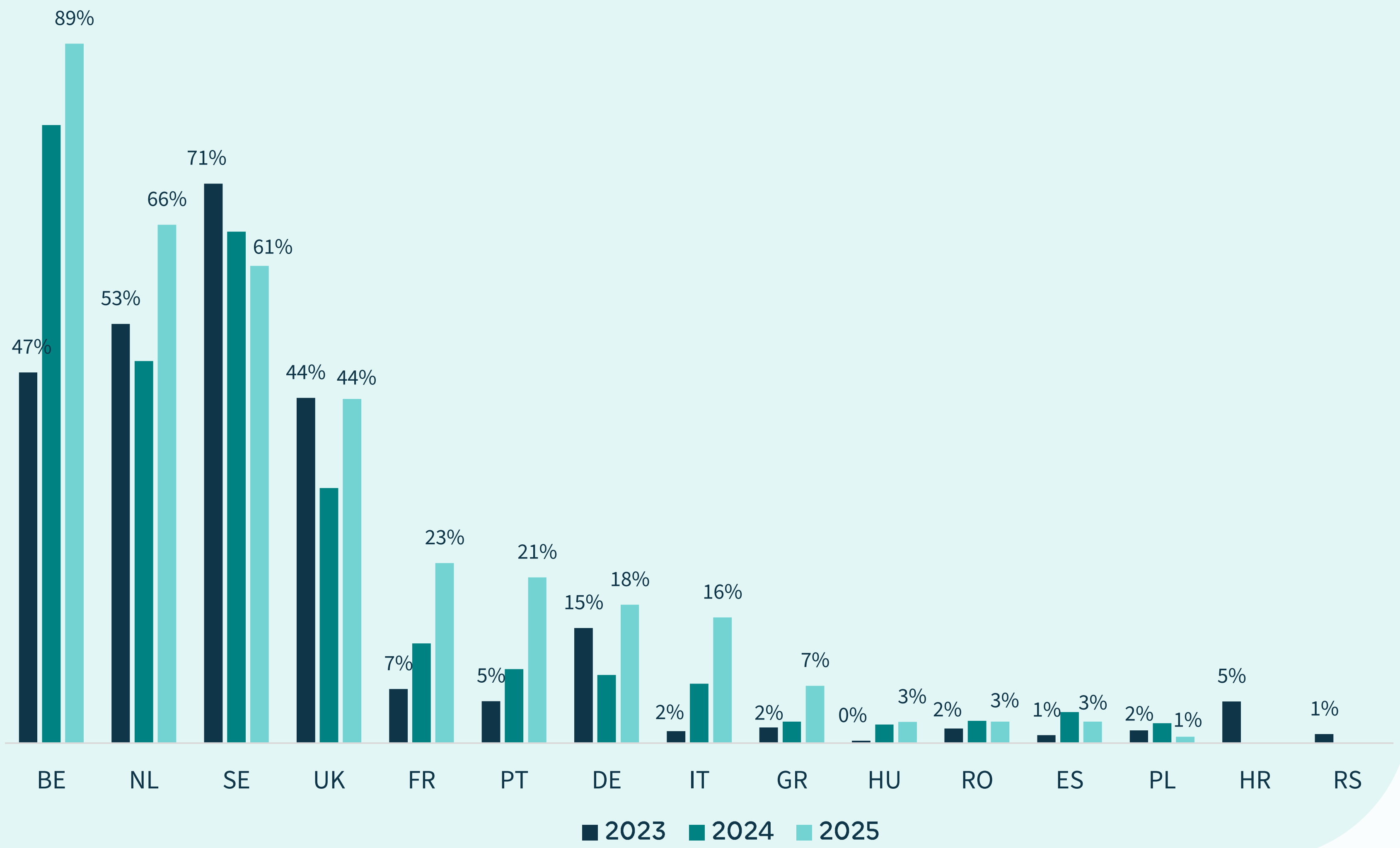


Petrol adoption varies considerably across consumer goods fleets, with Poland recording the highest share of new petrol vehicles at 77% in 2025.

Poland, Romania and Spain have seen the strongest growth in petrol vehicle adoption since 2023, while Croatia and the Netherlands experienced the largest declines.

Belgium, Sweden and Italy continue to have relatively low petrol shares, reflecting a faster transition towards electrified powertrains.

Northern European consumer goods fleets lead the transition to battery electric vehicles

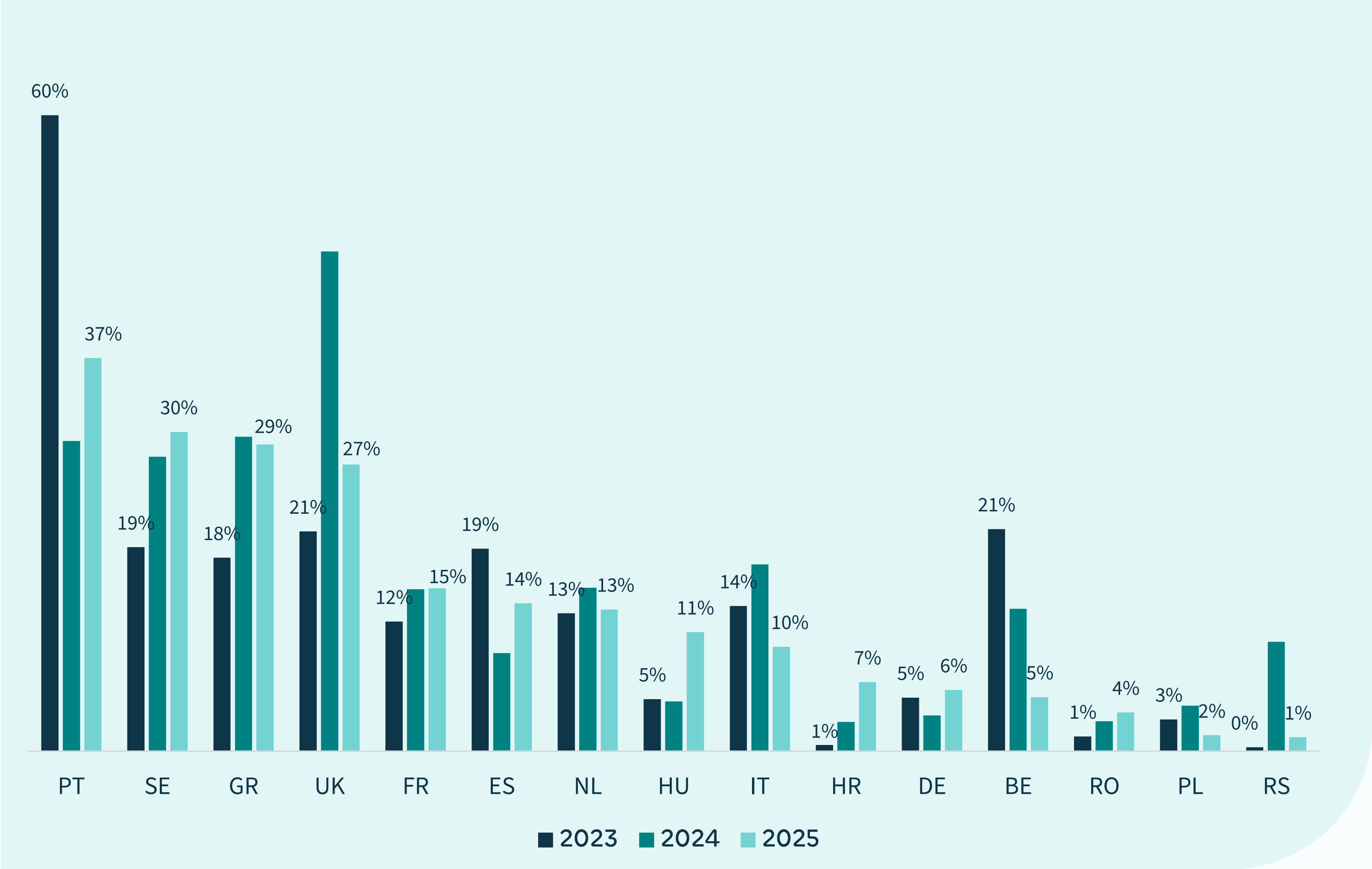


Battery electric vehicle adoption remains low in several Central and Eastern European consumer goods fleets, including Romania, Serbia, Poland and Greece.

Over 60% of new vehicles in Belgium, the Netherlands and Sweden were BEVs in 2025.

Belgium and the Netherlands have seen the largest increases in BEV adoption since 2023, while Sweden remains one of the most electrified consumer goods fleet markets.

Plug-in hybrid adoption remains strongest in Portugal and the United Kingdom

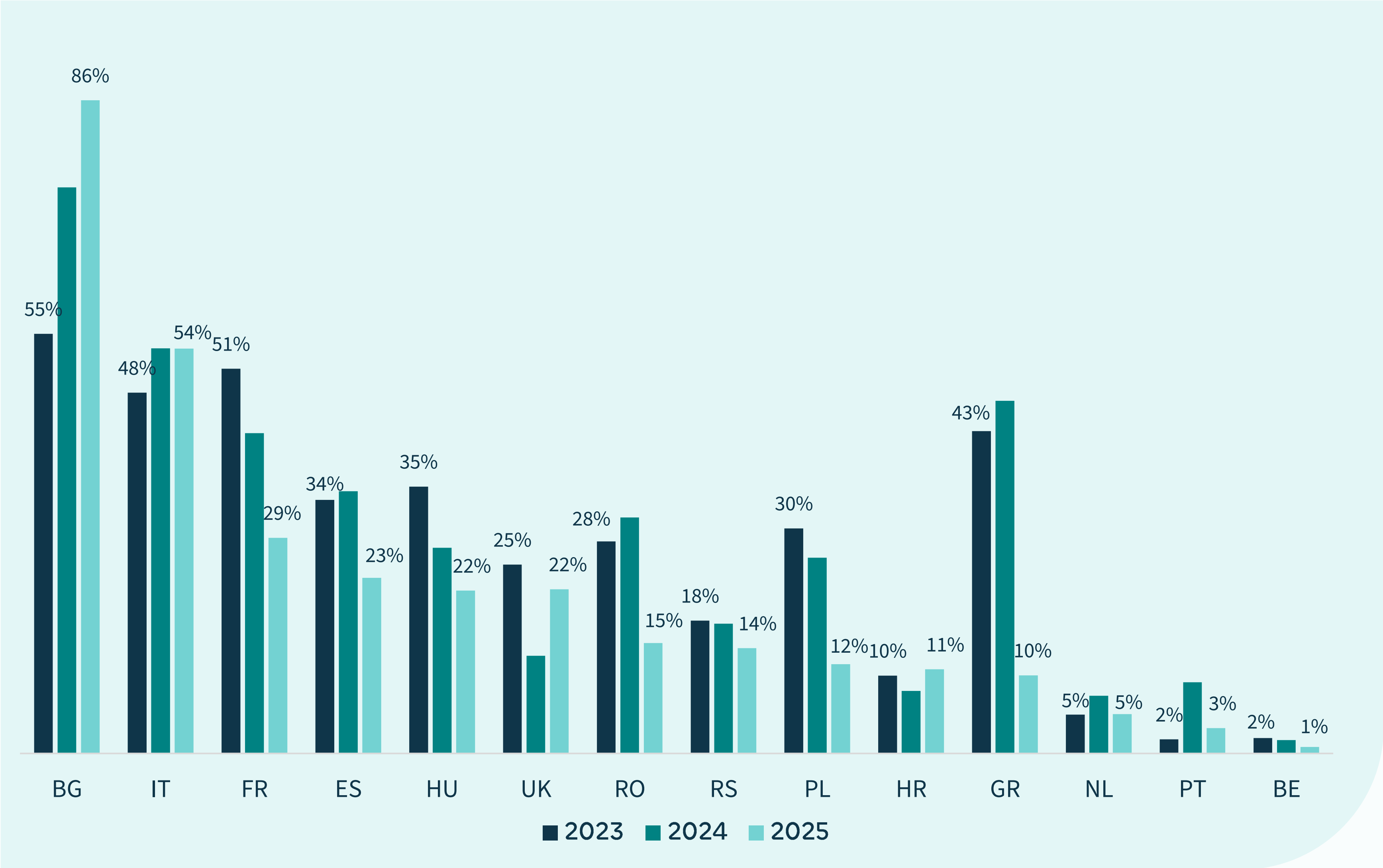


Portugal and the United Kingdom continue to have the highest shares of plug-in hybrid vehicles (PHEVs) in consumer goods fleets, despite lower adoption levels than in 2023.

Sweden and France have seen steady growth in PHEV adoption, while Greece maintains a relatively high share at around 29% of new registrations in 2025.

PHEV uptake remains limited in several markets, including Serbia, Romania, Poland and Croatia, where plug-in hybrids account for less than 10% of new fleet registrations in 2025.

Bulgaria and Italy lead hybrid adoption in consumer goods fleets

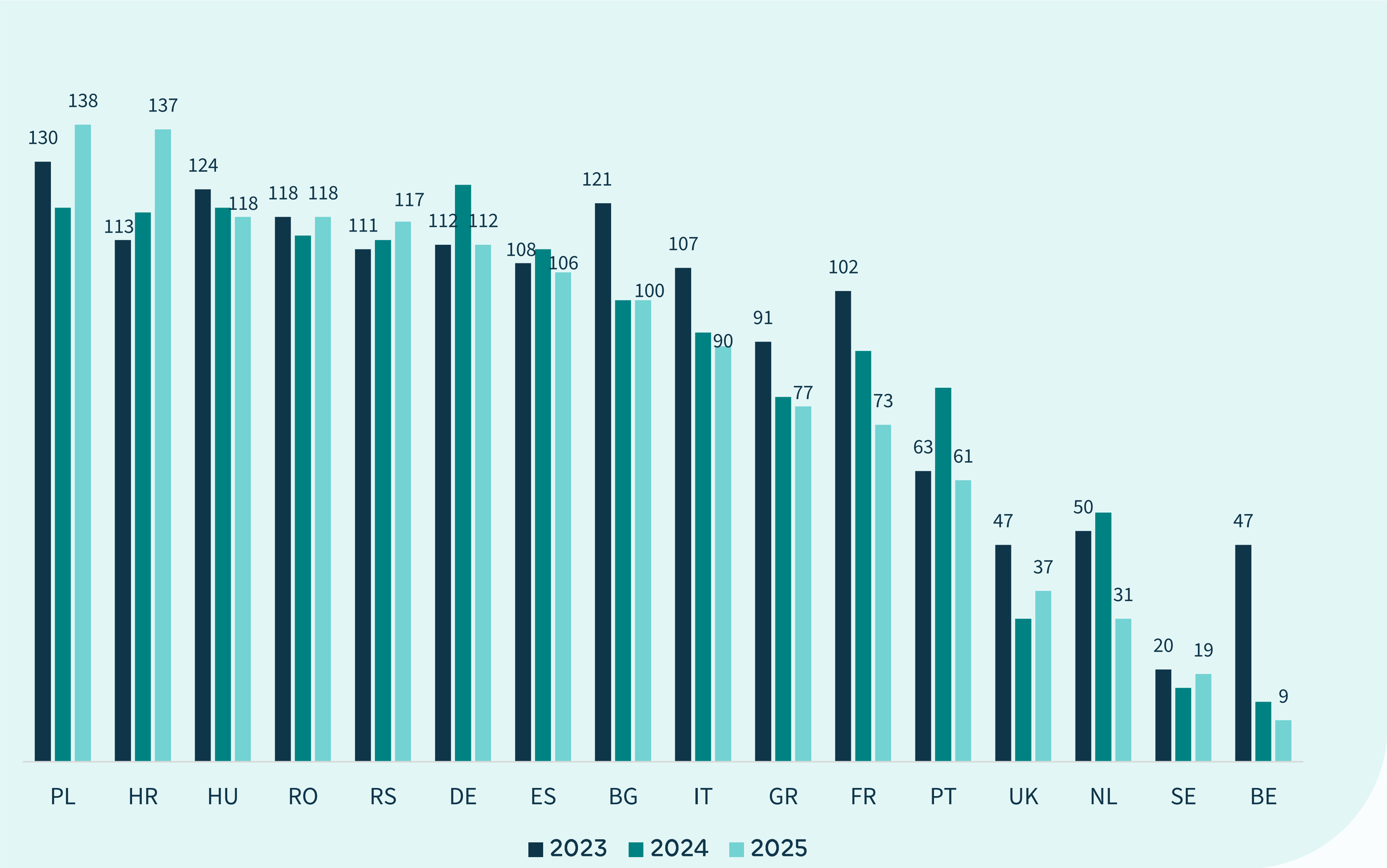


Hybrid vehicles dominate new registrations in Bulgaria, accounting for 86% of new fleet vehicles in 2025.

Most markets have seen stable or declining hybrid adoption since 2023, with notable growth in Bulgaria.

Belgium, Portugal and the Netherlands continue to report relatively low hybrid shares compared to the leading markets.

CO_2 emissions remain highest in Eastern European consumer goods fleets



Average CO_2 emissions have decreased in several consumer goods fleet markets since 2023, particularly in France, Bulgaria and the Netherlands.

Belgium and Sweden continue to have the lowest average CO_2 emissions in 2025, at 9 g/km and 19 g/km respectively, reflecting high levels of fleet electrification.

Croatia and Poland recorded the highest average CO_2 emissions in 2025, at 137 g/km and 138 g/km respectively, highlighting the slower transition away from conventional powertrains in these markets

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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