Energy & Chemicals industry benchmark

2026

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Introduction

In this industry benchmark report, the most important fleet trends for Energy & Chemicals fleets in Europe are highlighted by comparing passenger car registrations between 2023 and 2025. The following definition of the Energy & Chemicals industry has been applied: companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals.

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:

BEVs have become the leading powertrain in Energy & Chemicals fleets, increasing from 22% of new registrations in 2023 to 49% in 2025, more than doubling their share over the period. Diesel registrations continue to decline rapidly, accelerating the industry's transition toward electrification.

Electrification maturity varies significantly across markets. Belgium, the Netherlands and Sweden lead BEV adoption, while hybrid and diesel powertrains continue to play a larger role in several Southern and Eastern European markets.

Fleet CO_2 emissions continue to fall across Europe, supported by growing uptake of BEVs and other electrified powertrains. Belgium, Sweden and the Netherlands recorded the lowest average CO_2 emissions in 2025.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
SUV - D1	20%	SUV –D1	16%	SUV - C1	19%
SUV - C1	14%	SUV – C1	16%	SUV - D1	18%
C1	11%	C1	14%	C1	11%
SUV – B1	11%	SUV – 2	13%	SUV – C2	11%
SUV - C2	8%	SUV – B1	7%	SUV –B1	7%
D2	8%	D1	7%	D2	6%
D1	8%	SUV - D2	6%	SUV – C2	6%
SUV-D2	6%	D2	6%	D1	5%
B1	4%	B1	5%	B1	4%
C2	3%	E2	2%	E2	4%

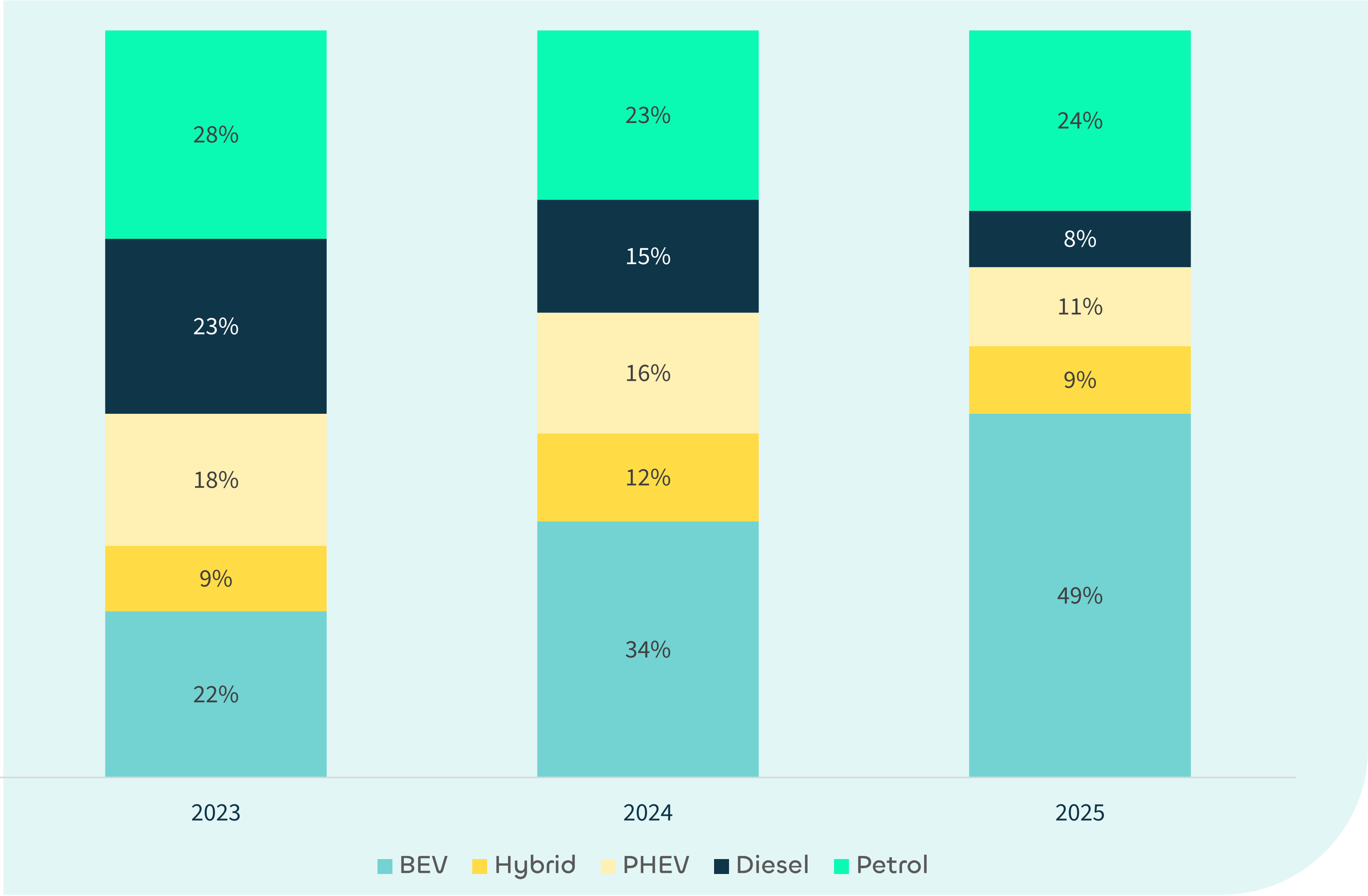
Most popular car segment: SUV - C1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
PEUGEOT 2008	6%	PEUGEOT 308	4%	PEUGEOT 2008	5%
PEUGEOT 5008	5%	BMW X1	4%	PEUGEOT 5008	5%
PEUGEOT 3008	4%	PEUGEOT 2008	4%	PEUGEOT 3008	4%
SKODA OCTAVIA	4%	SKODA ENYAQ	3%	PEUGEOT 308	3%
PEUGEOT 308	3%	KIA NIRO	3%	RENAULT SCENIC	3%
TESLA MODEL Y	3%	TESLA MODEL Y	3%	BMWi X1	3%
VOLVO XC40	3%	SKODA OCTAVIA	3%	BMW I4	3%
RENAULT CAPTUR	2%	PEUGEOT 3008	2%	CUPRABORN	3%
FORD KUGA	2%	PEUGEOT 5008	2%	SKODA ENYAQ	3%
VOLKSWAGEN TIGUAN	2%	VOLVO XC40	2%	VOLKSWAGEN ID.7	2%

Most popular car:
PEUGEOT 2008

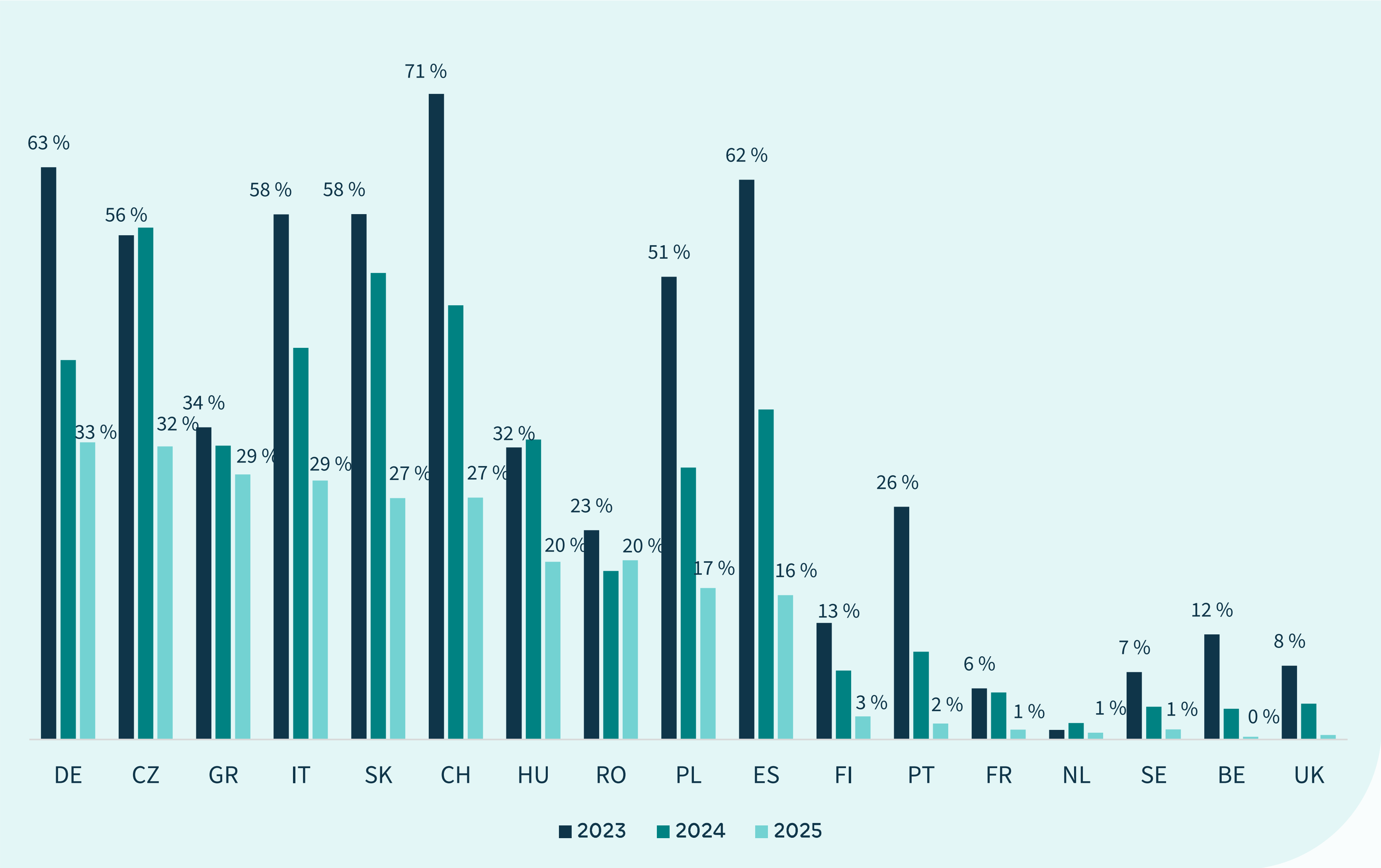
BEVs emerge as the clear market leader



By 2025, BEVs represent the largest powertrain segment at 49% share, more than doubling their 2023 level.

The gain is driven by continued contraction in Diesel and gradual declines across other powertrain types.

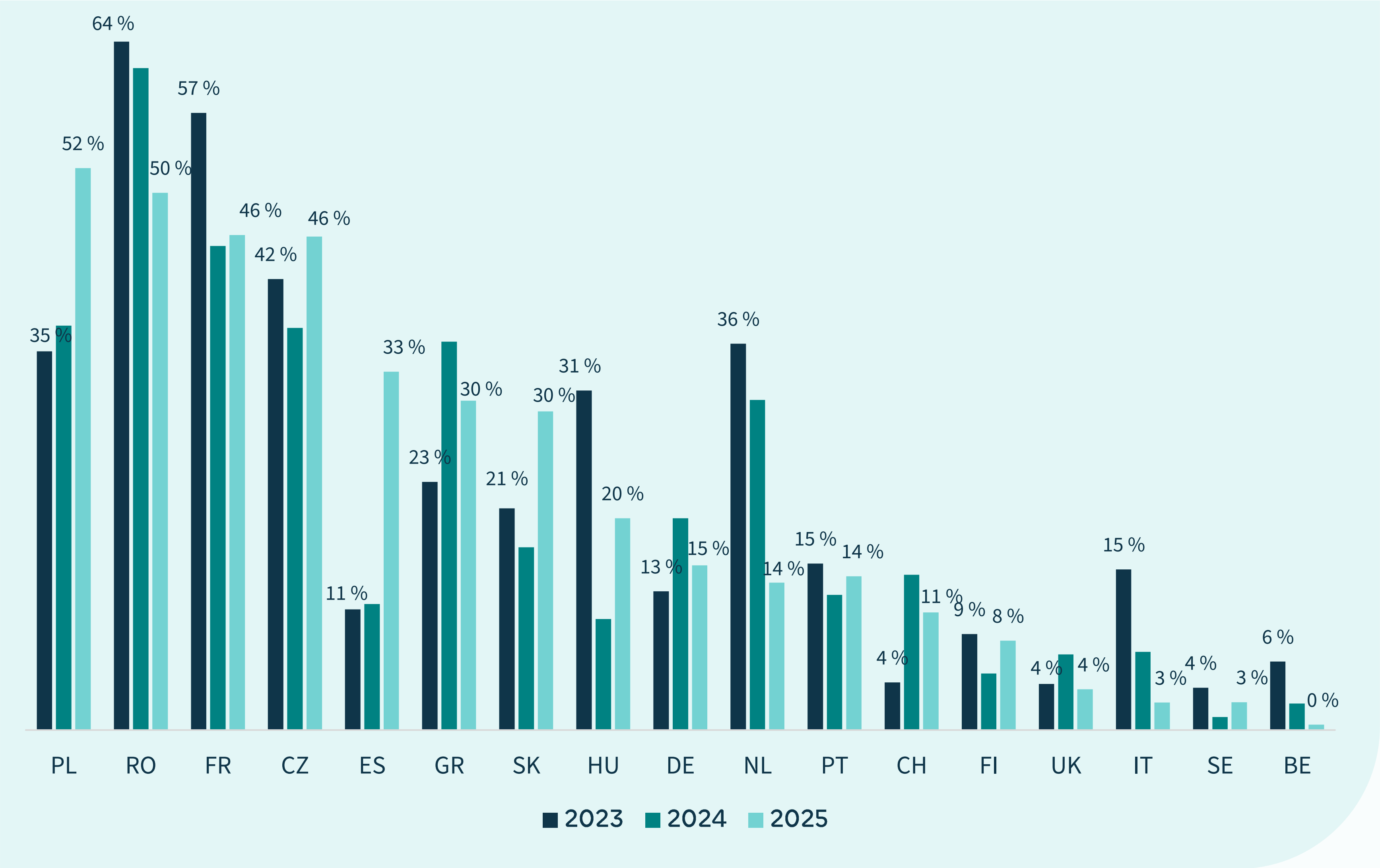
Diesel share continues to decline across all major markets



Diesel penetration falls substantially between 2023 and 2025 across Europe, with the steepest declines in traditionally diesel-heavy markets such as Germany (63% → 33%), Spain (62% → 16%), and Switzerland (71% → 27%).

By 2025, only Germany (33%) and Czech Republic (32%) remain above the 30% threshold.

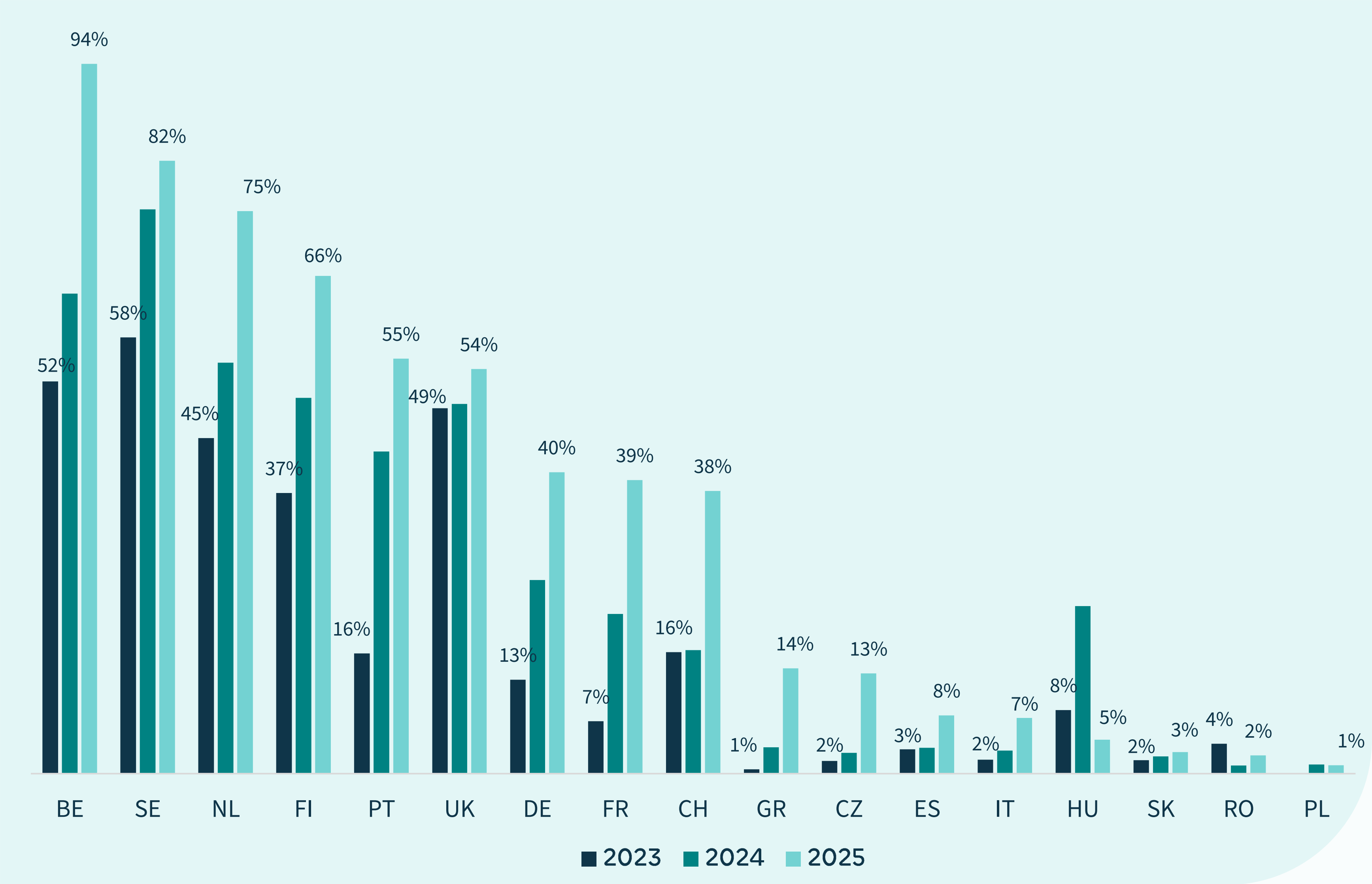
Petrol remains resilient with growth concentrated in selected markets



Petrol share increases in several markets between 2023 and 2025, most notably in Poland (35% → 52%), Spain (11% → 33%), and Slovakia (21% → 30%).

By 2025, Poland, Romania, France, and the Czech Republic record the highest petrol penetration, while adoption remains limited in Italy, Sweden, and Belgium.

Belgium and Sweden lead Europe's BEV adoption

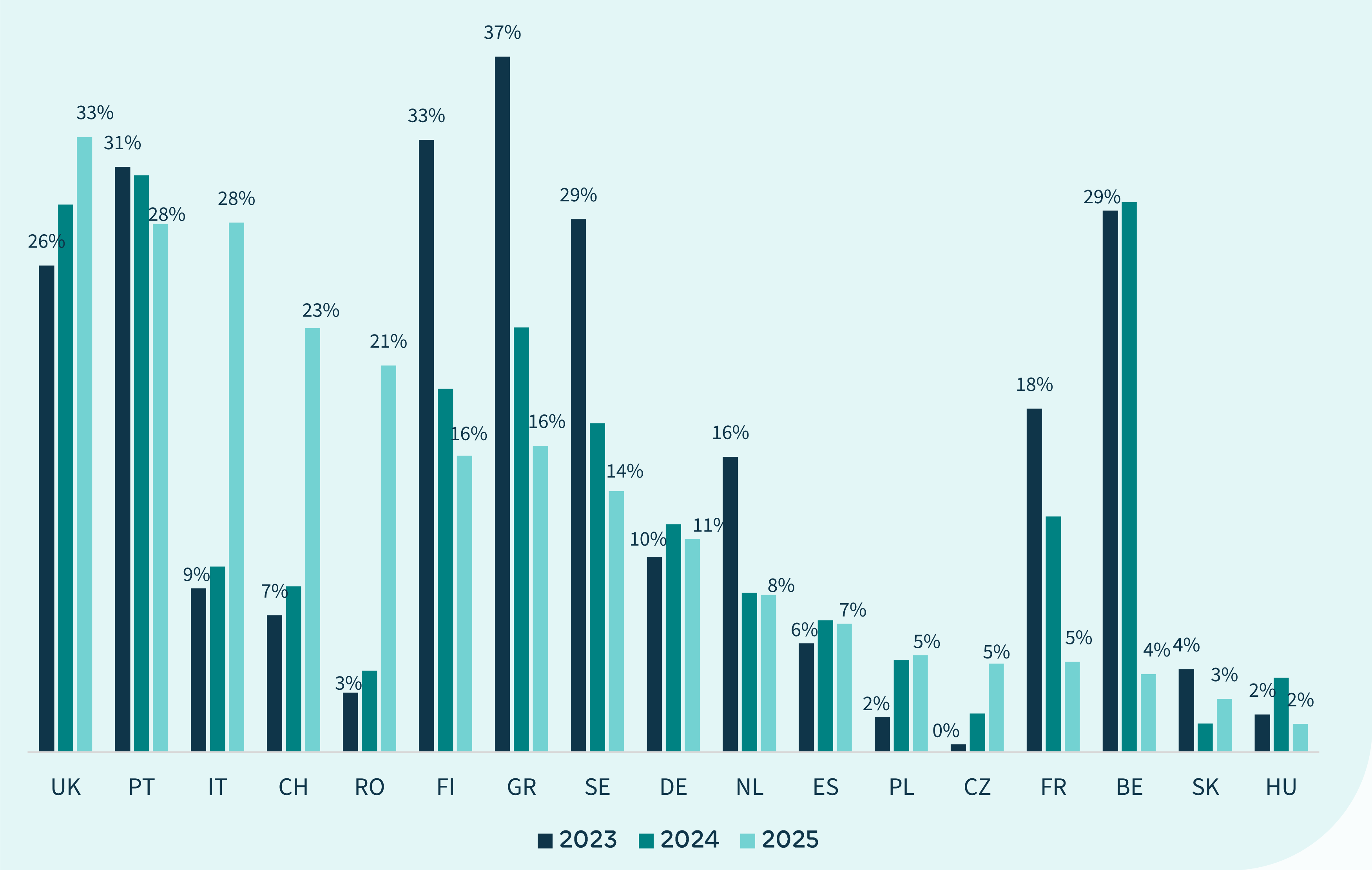


Belgium, the Netherlands and Finland have seen the strongest growth in BEV adoption since 2023.

Belgium leads all surveyed markets in 2025 (94%), followed by Sweden (82%) and the Netherlands (75%).

While BEV adoption continues to accelerate across most markets, Hungary, Romania and Poland remain at comparatively low levels.

Plug-in hybrid adoption shifts towards Southern and Eastern Europe

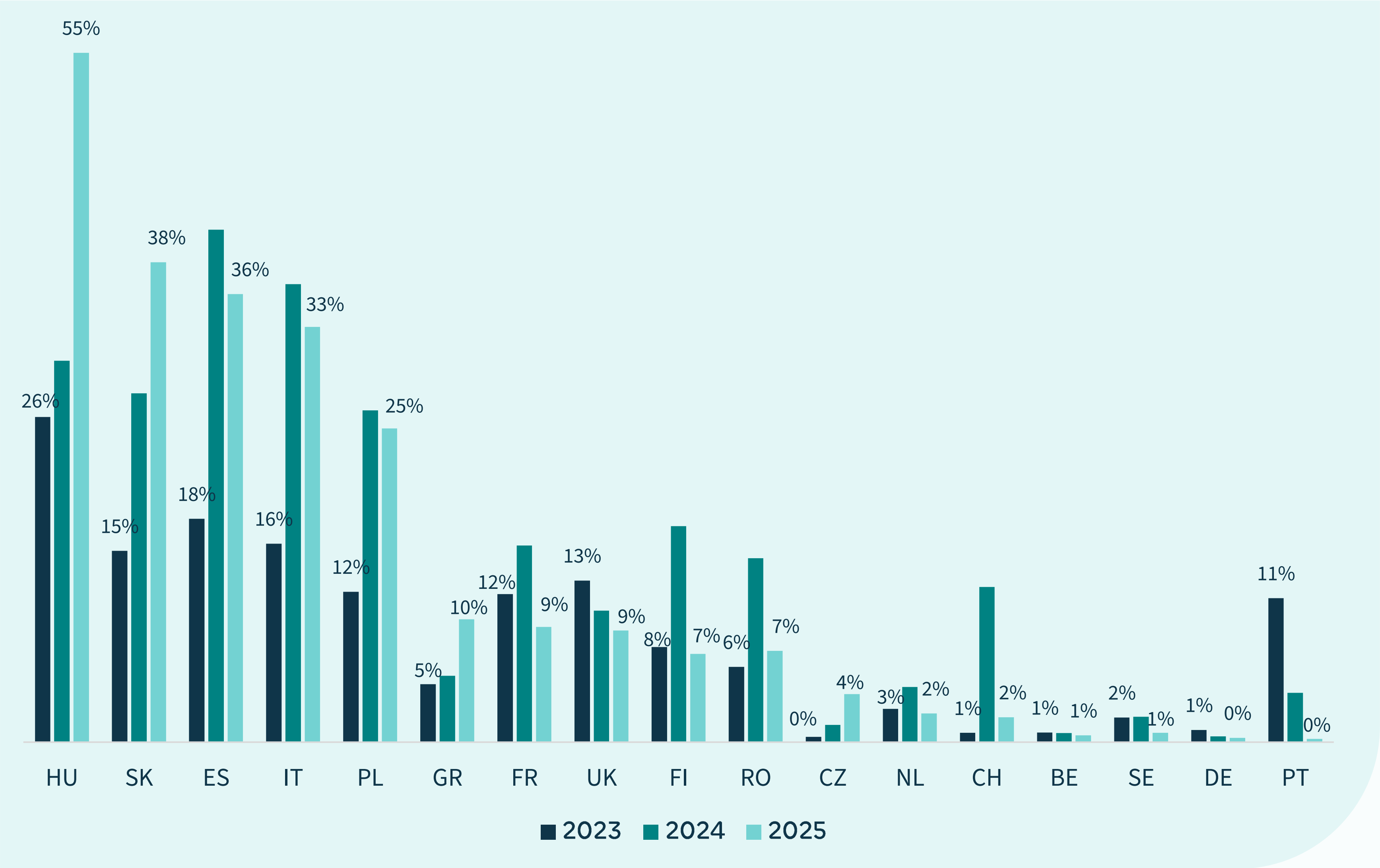


Italy, Switzerland and Romania have seen the strongest growth in plug-in hybrid (PHEV) adoption since 2023.

The UK remains the largest PHEV market in 2025 (33%), followed by Portugal (28%) and Italy (28%).

In contrast, Belgium, France, Finland and Greece have experienced notable declines in PHEV adoption over the period.

Hybrid adoption remains strongest in Southern and Eastern Europe

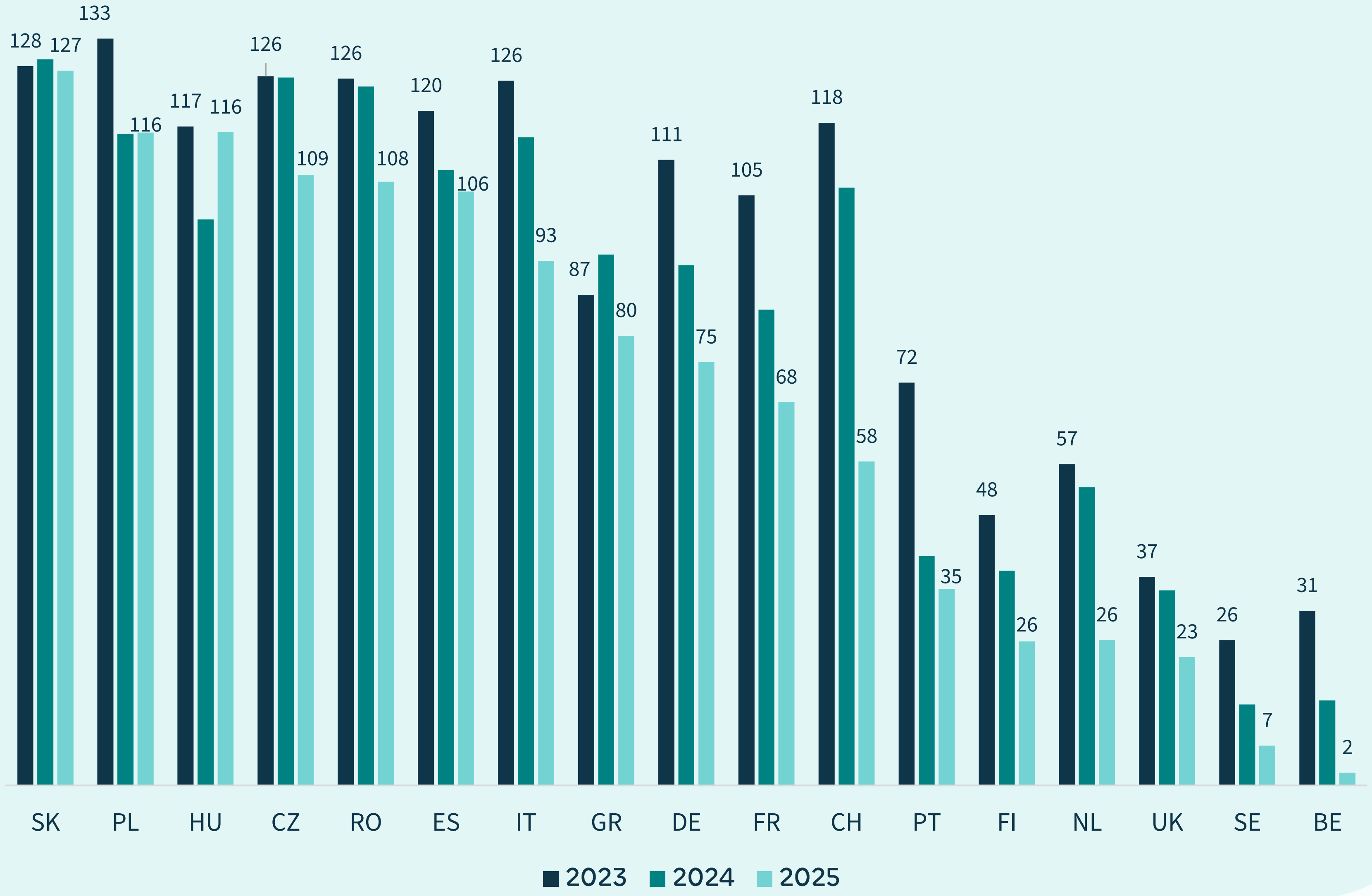


Hungary, Slovakia and Spain have the highest hybrid adoption rates in 2025, with hybrids accounting for 55%, 38% and 36% of new vehicles respectively.

Hungary and Slovakia have recorded the strongest growth since 2023, while Spain and Poland have also seen substantial increases in hybrid adoption.

In contrast, Portugal, Germany and Sweden remain low-adoption markets, with hybrid penetration below 5% in 2025.

CO_2 emissions continue to decline across all markets



Average CO_2 emissions have declined across all surveyed markets since 2023, reflecting the continued shift towards electrified vehicle powertrains.

Belgium and Sweden record the lowest emissions in 2025 at 2 g/km and 7 g/km respectively, while Finland and the Netherlands have also achieved low emission levels (26 g/km).

The largest reductions since 2023 were recorded in Switzerland, France and Belgium, while Slovakia, Poland and Hungary remain the highest-emitting markets despite ongoing improvements.

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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