Financial and Professional services industry benchmark

2026

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Introduction

In this industry benchmark report, the most important fleet trends for Financial & Professional Services fleets in Europe are highlighted by comparing passenger car registrations between 2023 and 2025. The following definition of the industry has been applied: companies offering financial products (banks, insurers, etc.) or professional services such as accountancy and consultancy.

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:

Financial & Professional Services is one of Europe's leading industries for fleet electrification. BEVs became the dominant powertrain, increasing from 32% of new registrations in 2023 to 52% in 2025, while diesel and PHEV shares continued to decline.

Electrification levels vary considerably across Europe. The Netherlands (91%), Denmark (88%), and Belgium (84%) lead BEV adoption, while markets such as Romania, Poland, and Greece continue to show a stronger preference for petrol and plug-in hybrid vehicles.

Growing adoption of electric vehicles is driving substantial reductions in fleet emissions. By 2025, Sweden (6 g/km), the Netherlands (8 g/km), and Belgium (9 g/km) recorded the lowest average CO_2 emissions, while Poland (117 g/km) and Romania (105 g/km) remain the highest-emitting markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
SUV - D1	14%	SUV –C2	17%	SUV - C1	16%
SUV - C1	13%	SUV – D1	14%	SUV - C2	12%
C1	12%	SUV - C1	12%	SUV – D1	12%
SUV – C2	12%	C1	11%	SUV – D2	10%
B1	10%	SUV – D2	8%	B1	9%
D2	8%	D2	7%	C1	9%
C2	7%	B1	7%	D2	6%
SUV - D2	7%	D1	6%	SUV – B1	5%
SUV - B1	7%	SUV - B1	5%	E2	4%
D1	5%	C2	4%	D1	3%

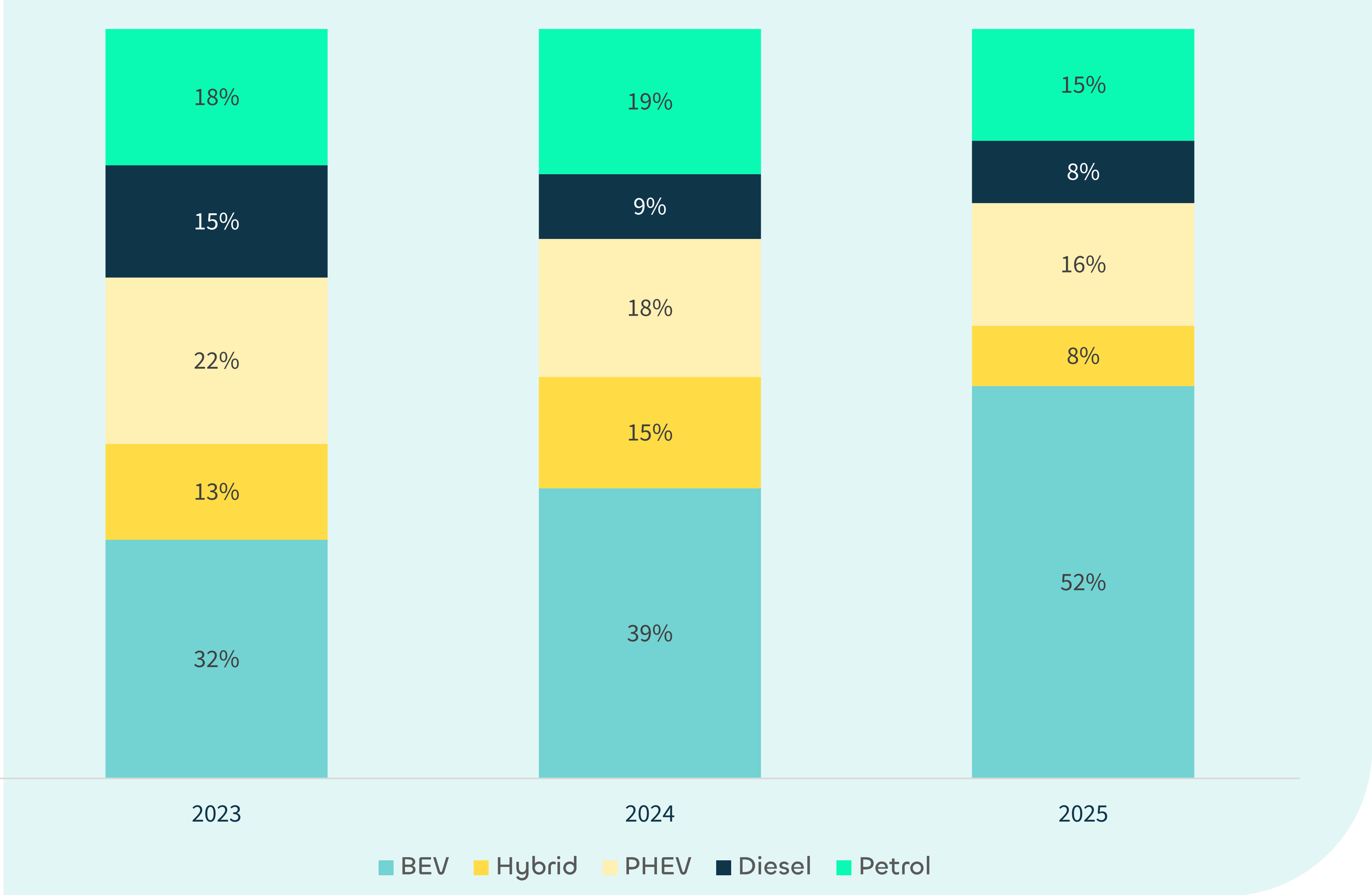
Most popular car
segment: SUV - C1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
TESLA MODEL Y	4%	BMW X1	5%	BMW X1	4%
RENAULT CLIO	3%	PEUGEOT 308	4%	RENAULT CLIO	3%
PEUGEOT 3008	3%	RENAULT AUSTRAL	3%	AUDI Q4 E-TRON	3%
PEUGEOT 2008	3%	RENAULT CLIO	3%	RENAULT SCENIC	3%
SKODA ENYAQ	3%	MERCEDES-BENZ EQB	3%	PEUGEOT 2008	2%
TOYOTA COROLLA	3%	TESLA MODEL Y	3%	AUDI Q6 E-TRON	2%
AUDI A3	2%	TOYOTA COROLLA	3%	PEUGEOT 308	2%
VOLVO XC40	2%	AUDI Q4 E-TRON	3%	MINI ACEMAN	2%
PEUGEOT 308	2%	TESLA MODEL 3	2%	MERCEDES-BENZ EQB	2%
POLESTAR 2	2%	BMW i4	2%	BMW i4	2%

Most popular car:
BMW X1

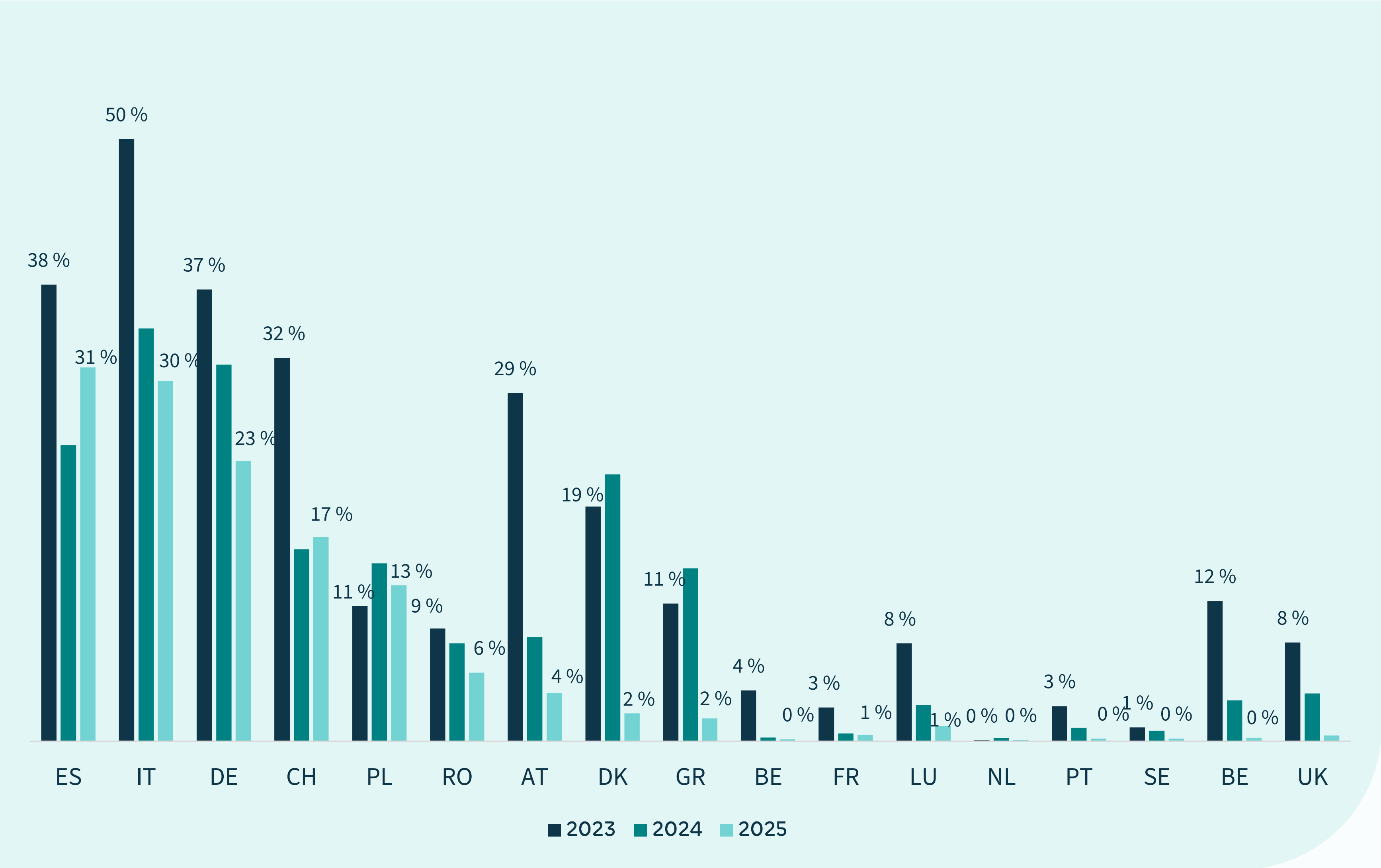
BEVs become the dominant powertrain in Financial & Professional Services fleets



BEV adoption continues to accelerate, reaching 52% of new registrations in 2025 and becoming the leading powertrain in Financial & Professional Services fleets.

Growth is primarily driven by declining diesel and PHEV shares, highlighting the sector's strong commitment to fleet electrification.

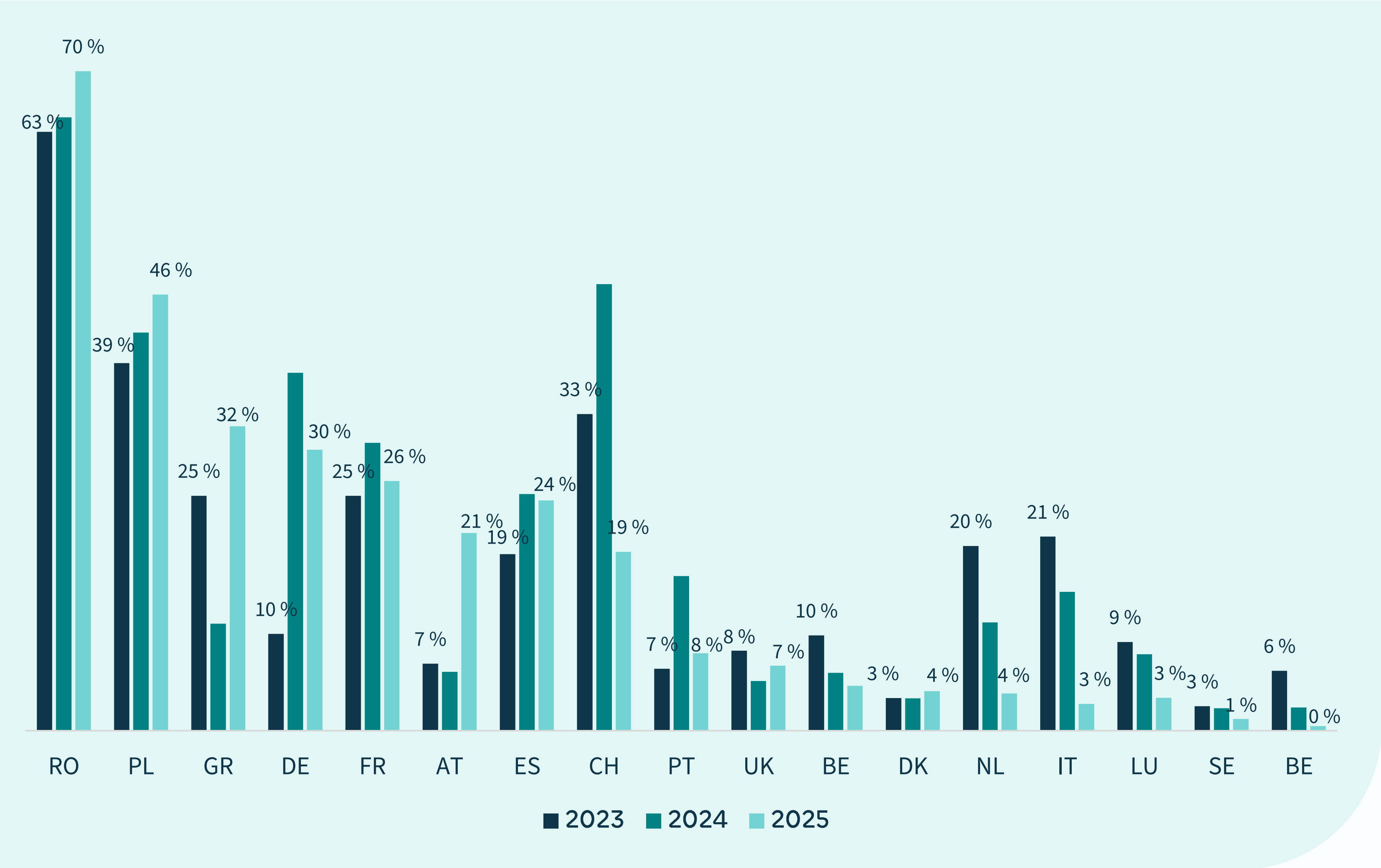
Diesel adoption continues to decline across Financial & Professional Services fleets



Diesel penetration decreases significantly between 2023 and 2025, with the sharpest declines in Austria (29% → 4%), Switzerland (32% → 17%), and Germany (37% → 23% after peaking decline).

By 2025, only Spain (31%), Italy (30%), and Germany (23%) retain substantial diesel shares, while most other markets fall below 10%.

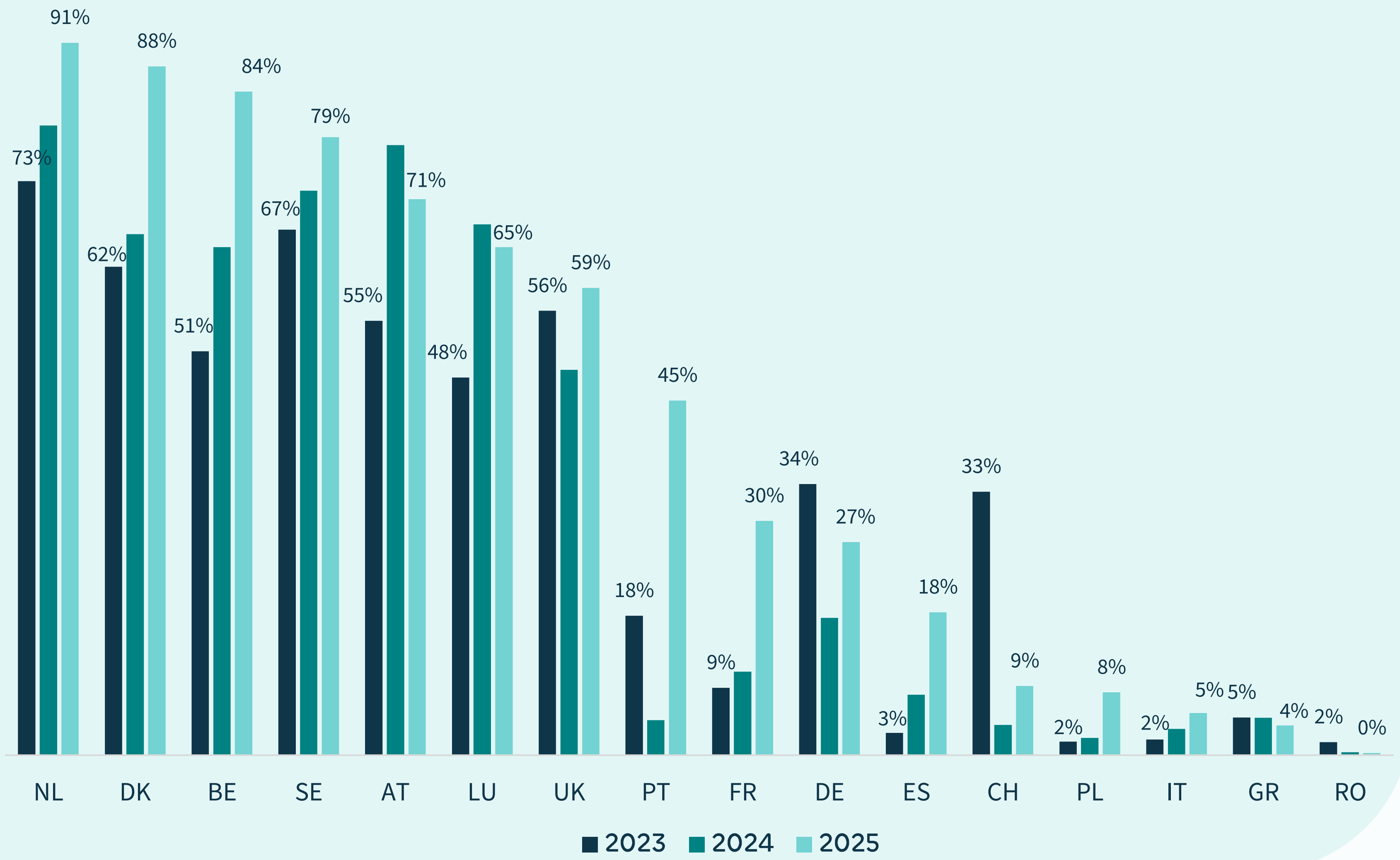
Petrol adoption remains strongest in Central and Eastern European markets



Petrol penetration is highest in Romania (70%), Poland (46%), and Greece (32%) in 2025.

While several Western European markets continue to transition toward electrified powertrains, petrol remains a dominant choice in parts of Central and Eastern Europe.

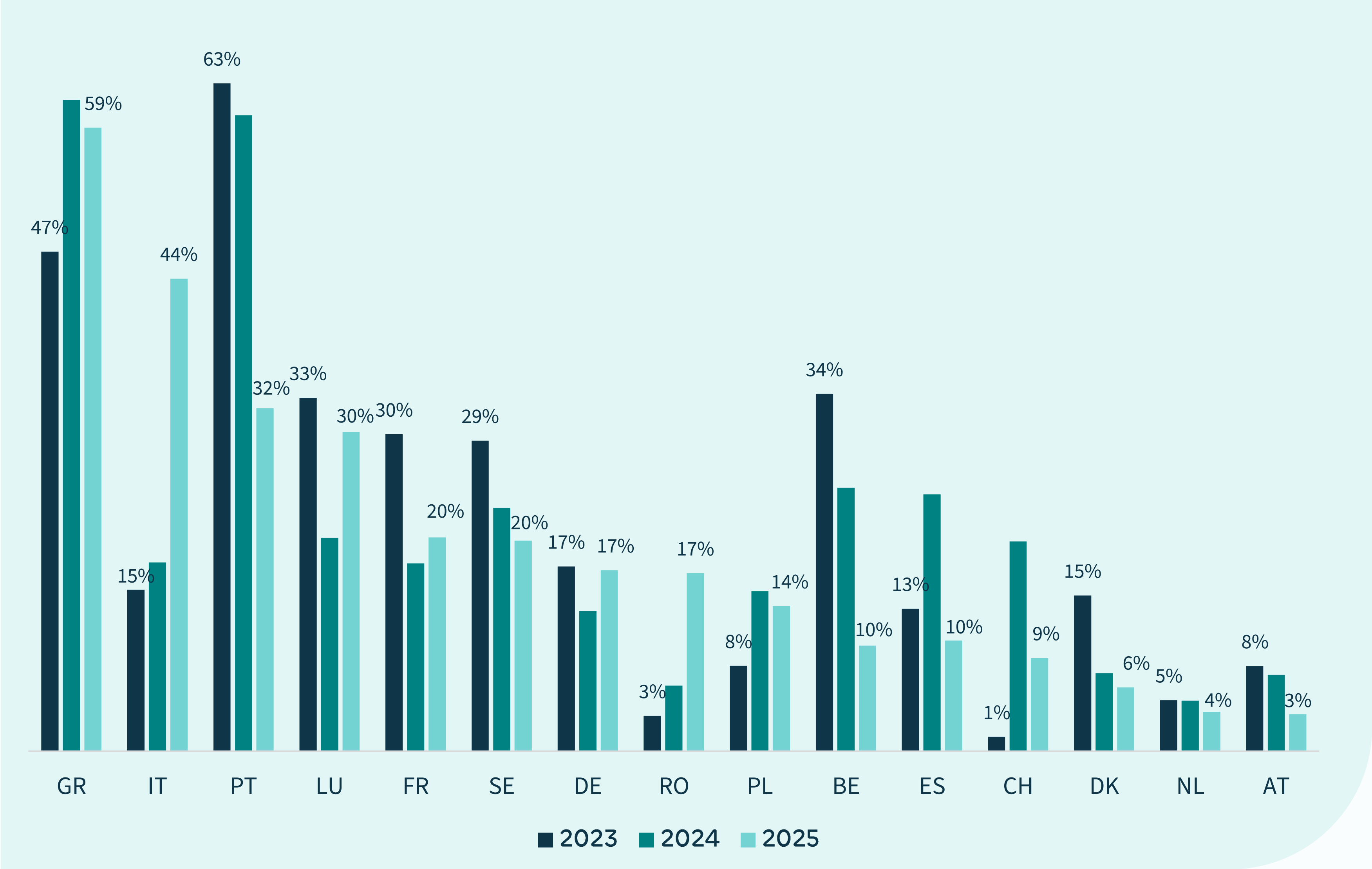
BEV adoption accelerates rapidly across Financial & Professional Services fleets



BEV penetration continues to grow strongly between 2023 and 2025, reaching 91% in the Netherlands, 88% in Denmark, and 84% in Belgium.

While Northern European markets remain at the forefront of electrification, countries such as Austria, Luxembourg, the UK, and France also record significant gains, highlighting the sector's broad transition toward fully electric mobility.

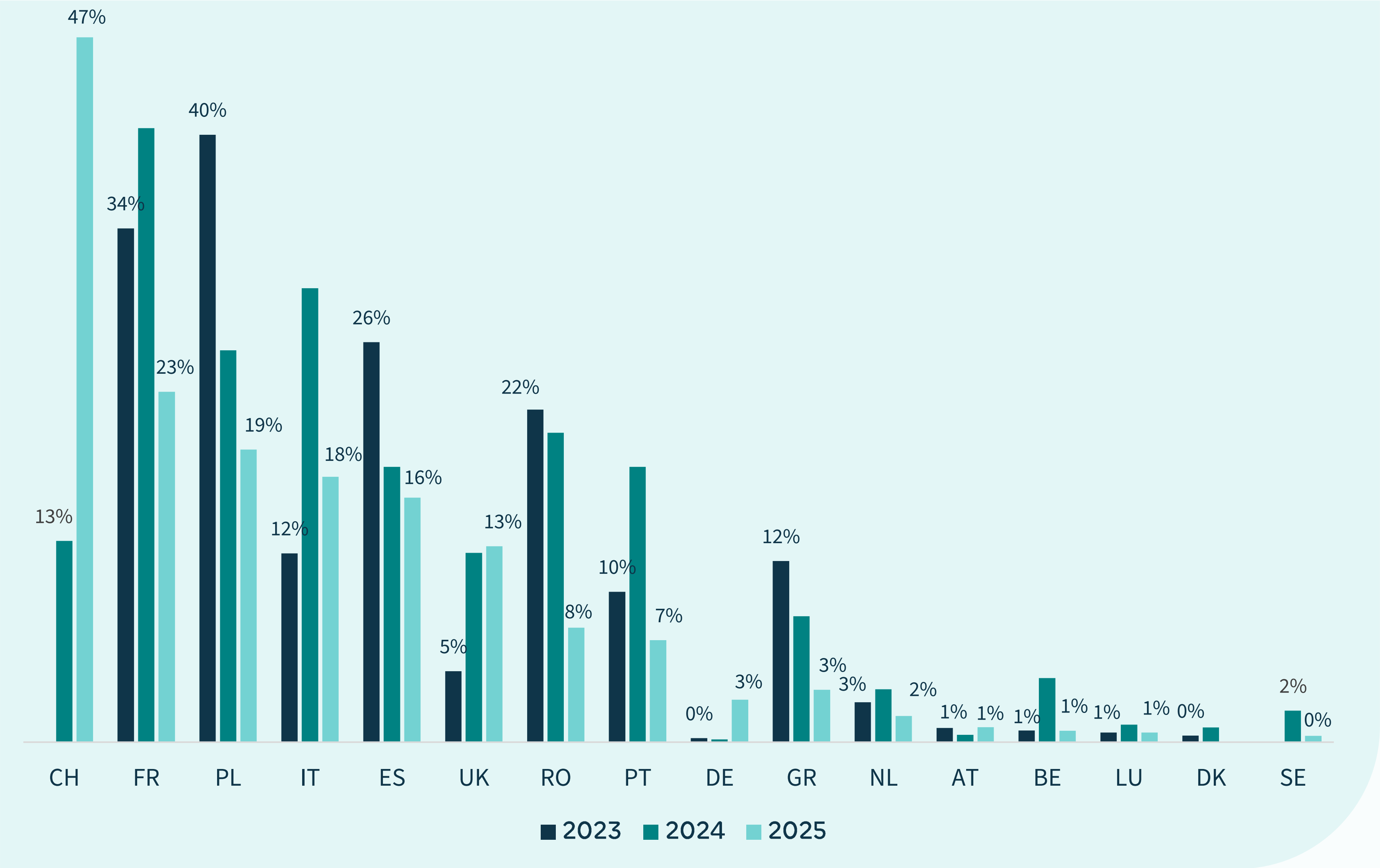
Plug-in hybrid adoption remains concentrated in a handful of key markets



PHEV penetration is highest in Greece (59%), Italy (44%), and Portugal (32%) in 2025.

While several markets continue to rely on plug-in hybrids as a transition technology, adoption is declining in many countries as fleets increasingly move directly toward BEVs.

Hybrid adoption led by Switzerland, with strong growth across selected European markets

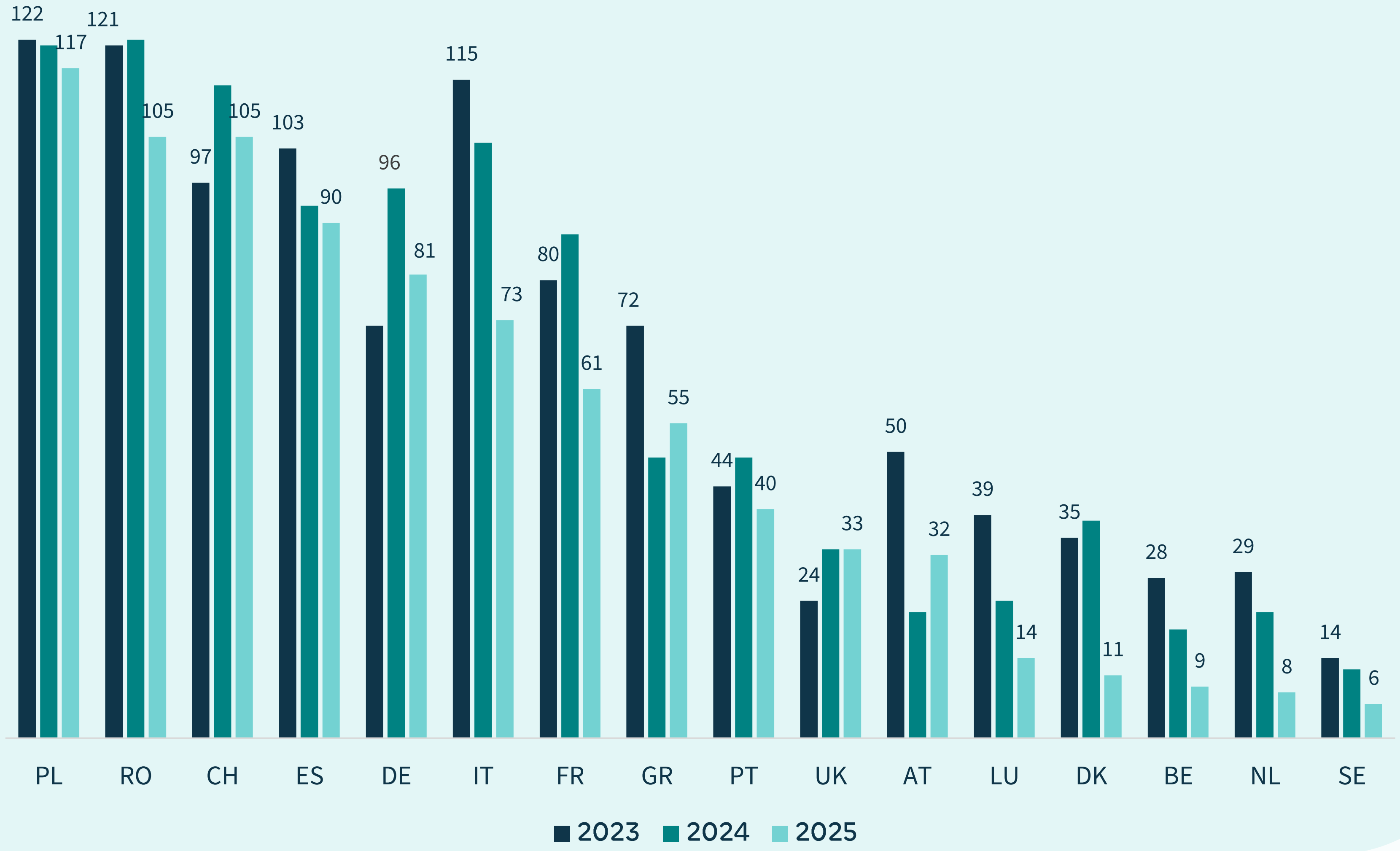


Switzerland has seen the strongest growth in hybrid adoption since 2023, increasing from 13% to 47% in 2025.

Switzerland leads all surveyed markets in 2025, followed by France (23%) and Poland (19%).

In contrast, Sweden, Denmark, Austria, Belgium and Luxembourg continue to report very low hybrid adoption levels, all at 1% or below in 2025.

CO_2 emissions decline as fleet electrification accelerates



Average CO_2 emissions decrease across most Financial & Professional Services fleet markets between 2023 and 2025, driven by rising BEV adoption.

The lowest emission levels are recorded in Sweden (6 g/km), Belgium (9 g/km) and Denmark (11 g/km), while Poland (117 g/km) and Romania (105 g/km) remain the highest-emitting 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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