Fleet Sustainability Ranking by Industry

2026

An analysis of industry adoption of sustainable passenger cars in fleets across European countries

Ayvens' International Consultancy publication

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Contents:

Background

Corporate fleets play a critical role in Europe's transition to low-emission mobility. With company cars representing a significant share of new vehicle registrations, fleet purchasing decisions have a major impact on the pace of transport decarbonisation.

The latest Ayvens data shows a clear acceleration in fleet electrification across industries. Between 2023 and 2025, battery electric vehicles increased their share in every sector, while diesel and petrol vehicles continued to decline.

This ranking highlights which industries are leading the transition and where further opportunities remain to reduce emissions and improve fleet sustainability.

About the rankings.

The Ayvens Fleet Sustainability Ranking by Industry measures the progress made by international fleets in adopting lower-emission passenger vehicles across Europe.

Industries are assessed using four equally weighted criteria:

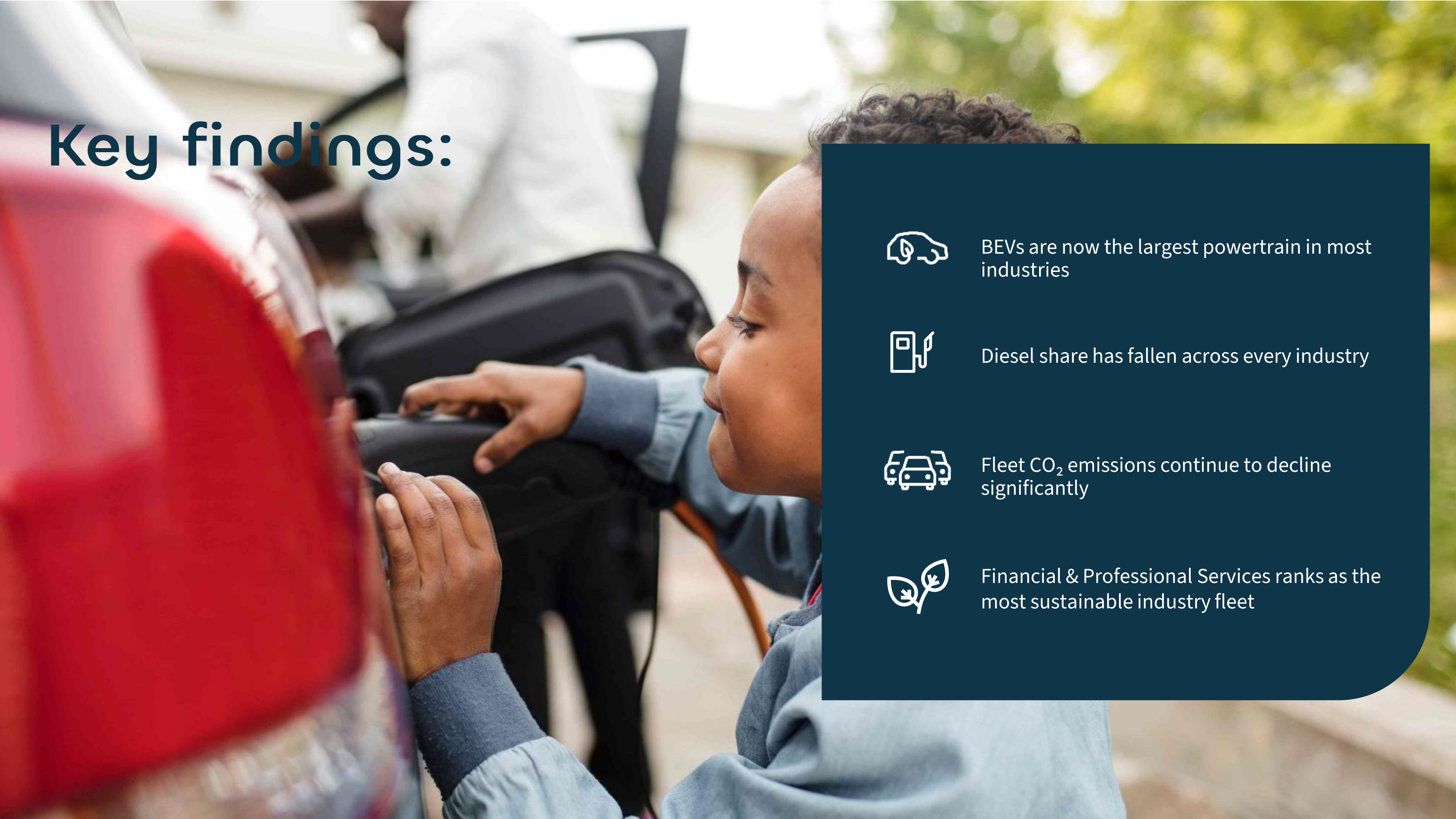
- Lowest share of diesel vehicles
- Highest share of battery electric vehicles (BEVs)
- Highest combined share of hybrids and plug-in hybrids
- Lowest average CO_2 emissions

Together, these indicators provide a comprehensive view of fleet sustainability and electrification progress.

The Fleet Sustainability Ranking by Industry is determined* using 4 key factors across the nine industries

Category	Weighting	Best score** among industries
Lowest share of diesel vehicles	25%	1
Highest share of BEVs	25%	1
Highest share of plug-in hybrids	25%	1
Lowest average CO2 emissions	25%	1

** In case of equal scores, the level of CO2 prevails*
*** Best total score = 4*



Key findings:

- BEVs are now the largest powertrain in most industries
- Diesel share has fallen across every industry
- Fleet CO_2 emissions continue to decline significantly
- Financial & Professional Services ranks as the most sustainable industry fleet

The rankings:

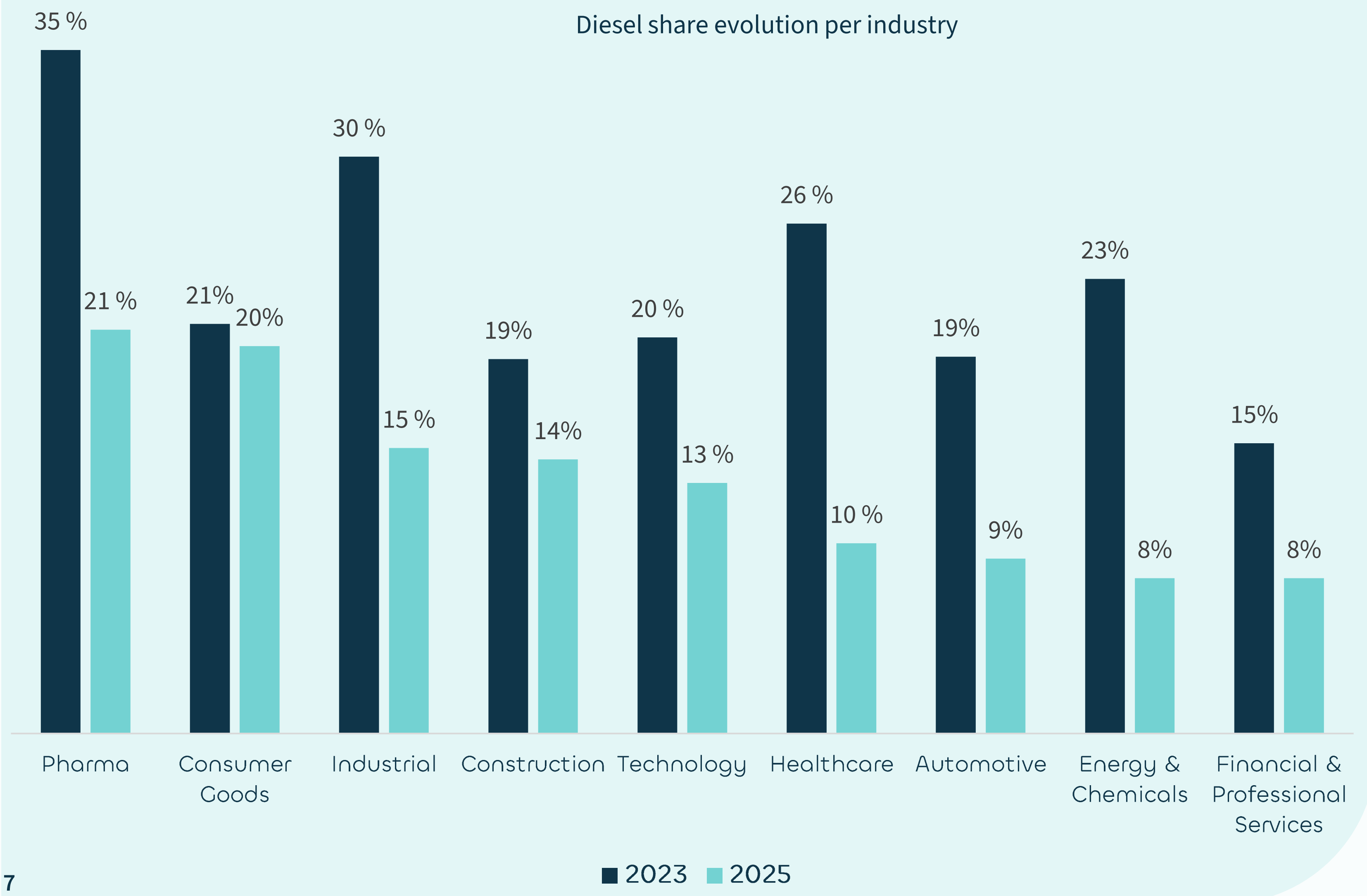
Rankings	Lowest share of diesel	Highest share of BEV	Highest share of PHEV/hybrid	Lowest avg. CO_2 emissions	Industry score
1. Financial & Professional Services	2	1	7	1	11
2. Automotive	3	6	1	5	15
3. Energy & Chemicals	1	2	8	4	15
4. Technology	5	5	4	2	16
5. Industrial	7	4	6	3	20
6. Healthcare	4	8	2	8	22
7. Construction	6	3	9	6	24
8. Pharma	9	7	5	7	28
9. Consumer goods	8	9	3	9	29

Best performing industries

Average performing industries

Lowest performing industries

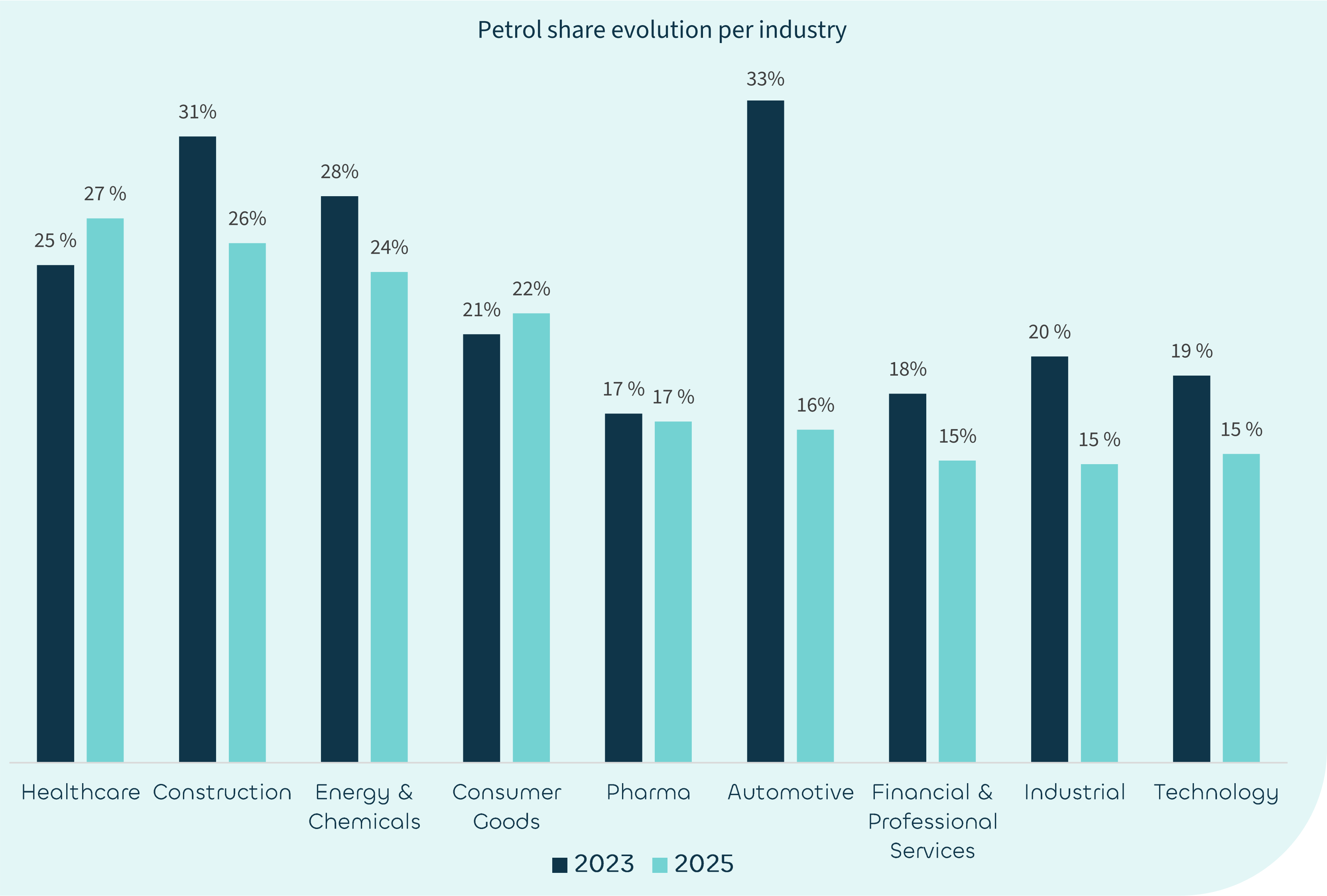
Diesel vehicle share has fallen across all industries, with most now below 15%



Diesel vehicle share declined across all industries between 2023 and 2025.

Pharma (21%) and consumer goods (20%) remain the most diesel-reliant sectors, while six industries now have diesel shares below 15%.

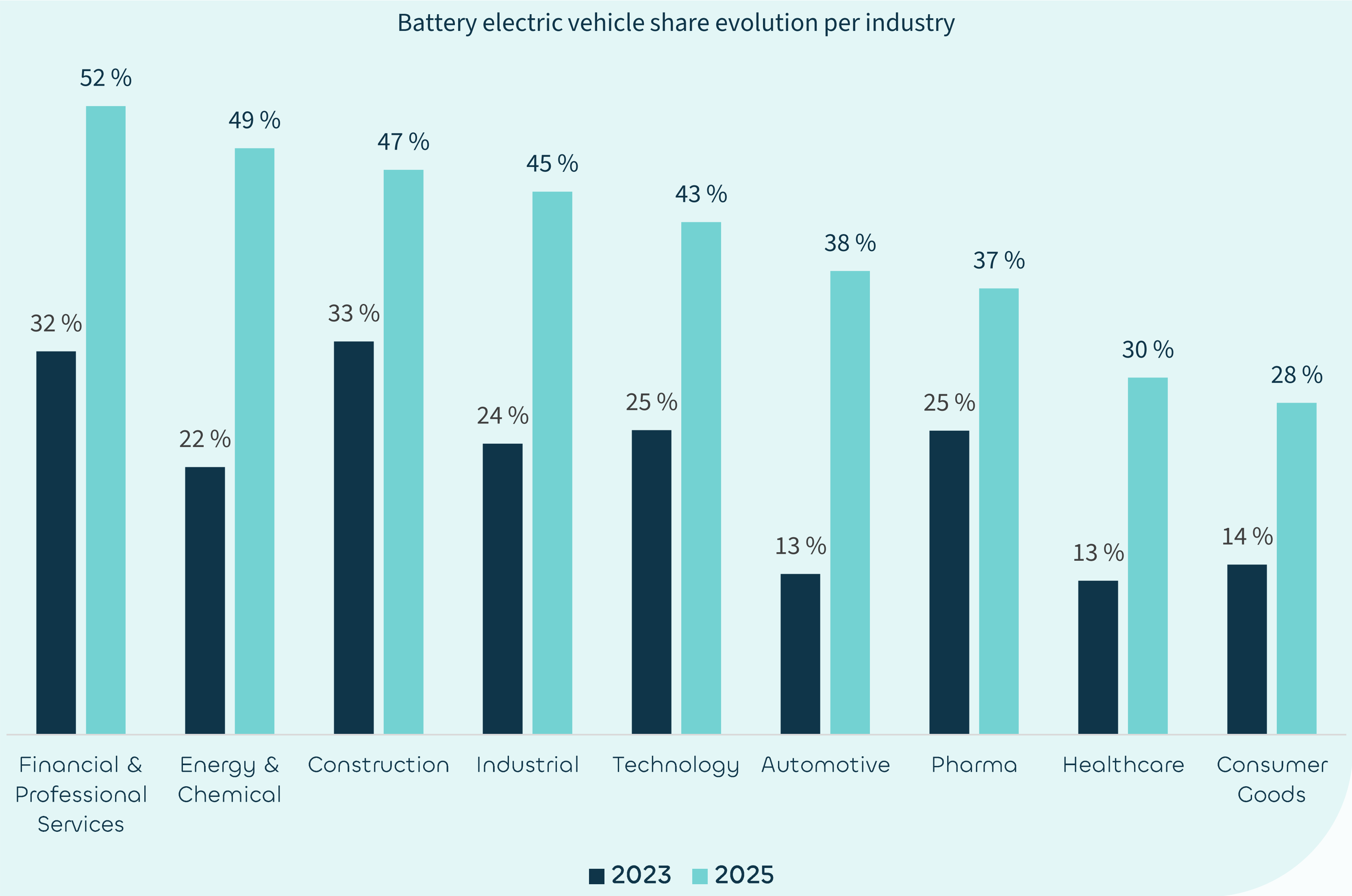
Petrol vehicle share declines across most industries as fleet powertrains continue to diversify.



Petrol vehicle share declined across most industries between 2023 and 2025.

Healthcare (27%), Construction (26%) and Energy & Chemicals (24%) recorded the highest shares in 2025, while Healthcare was the only sector to see an increase.

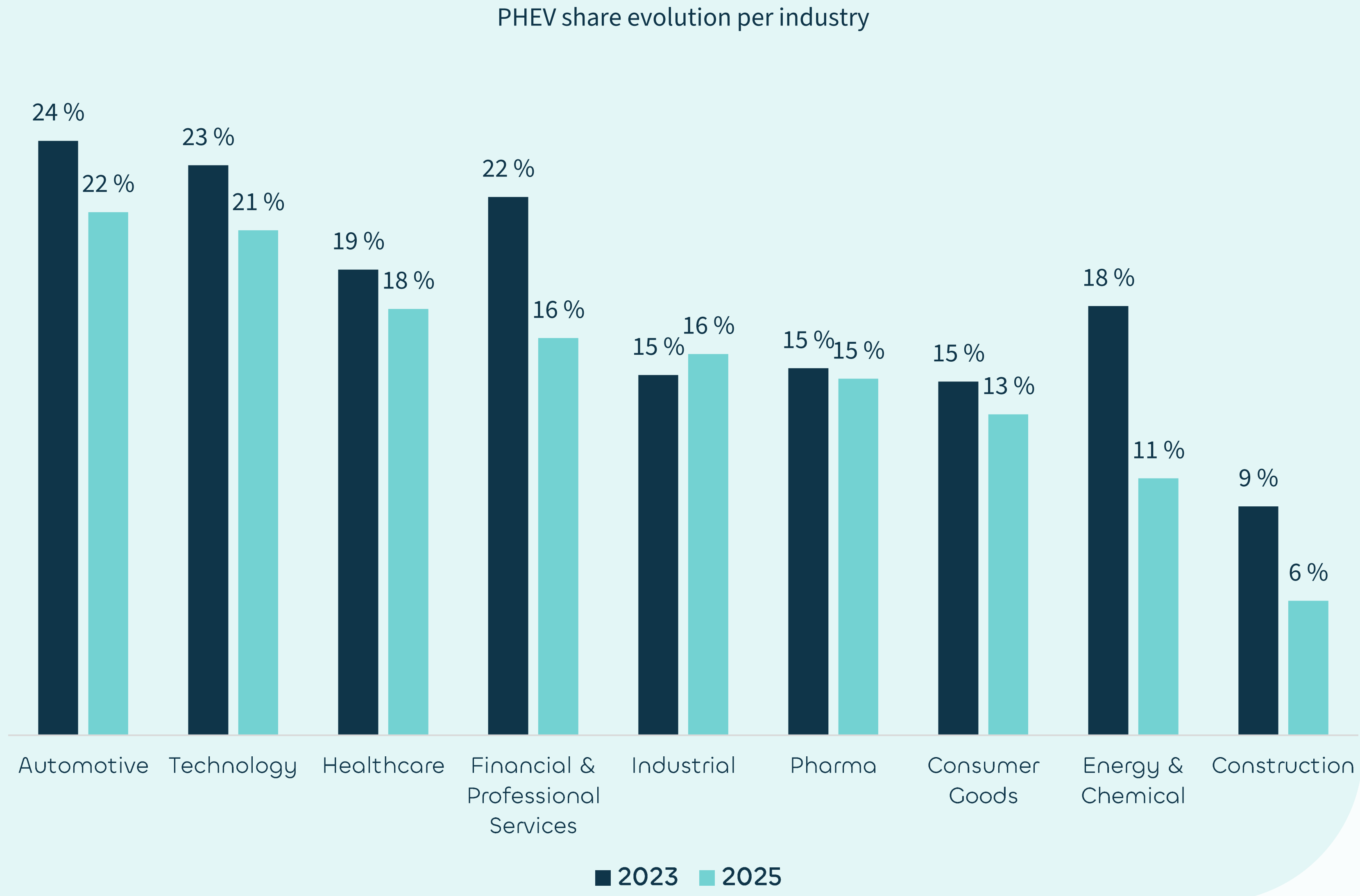
Battery electric vehicles now represent the largest share of new vehicle orders across most industries.



BEV adoption increased across all industries between 2023 and 2025, reflecting the continued acceleration of fleet electrification.

Financial & Professional Services (52%), Energy & Chemicals (49%), and Construction (47%) now have the highest BEV shares.

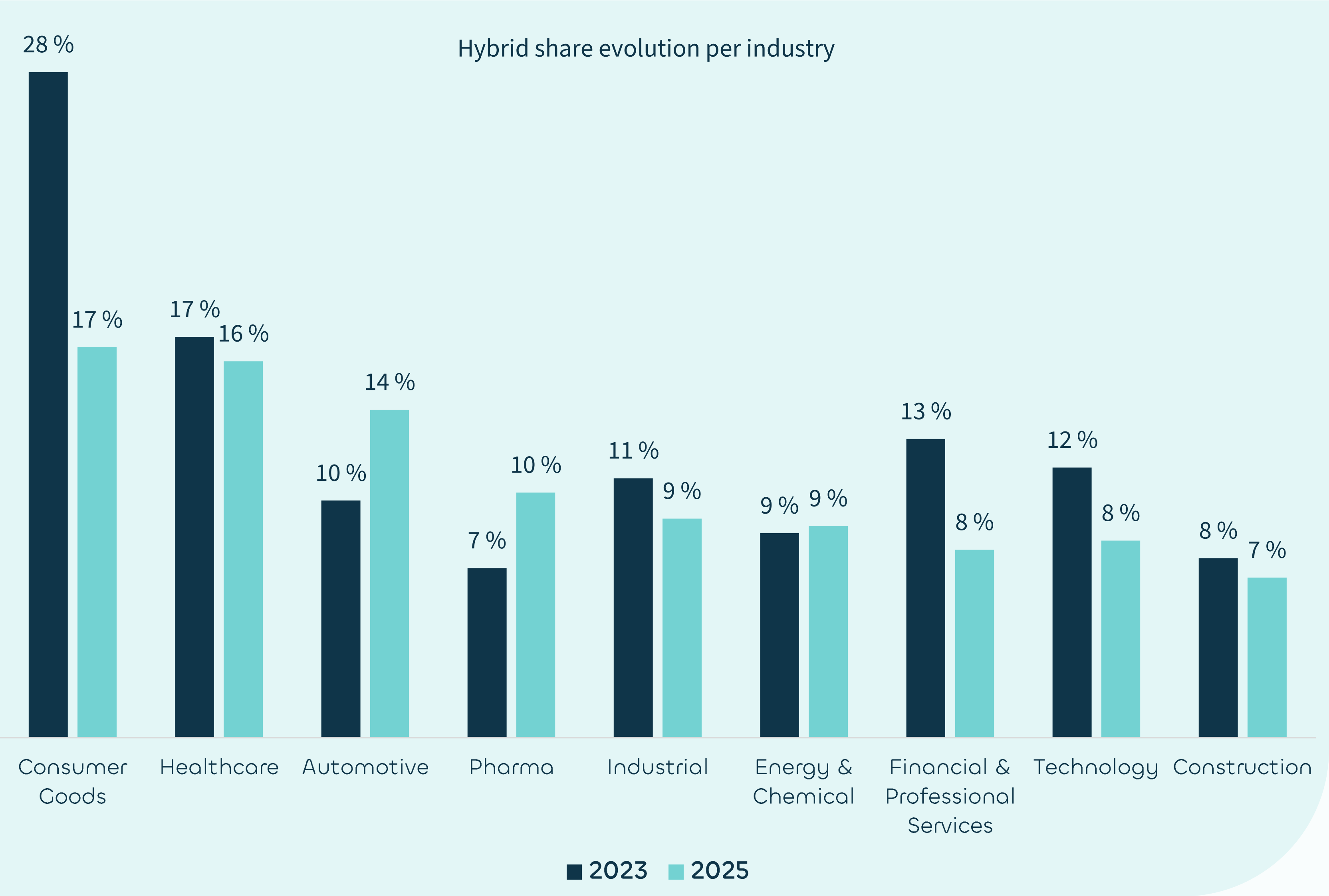
PHEV share declines across most industries as fleets transition towards BEVs.



PHEV share declined across most industries between 2023 and 2025 as BEV adoption accelerated.

Technology, Automotive, and Healthcare remain the most PHEV-reliant sectors, while Industrial was the only industry to record growth.

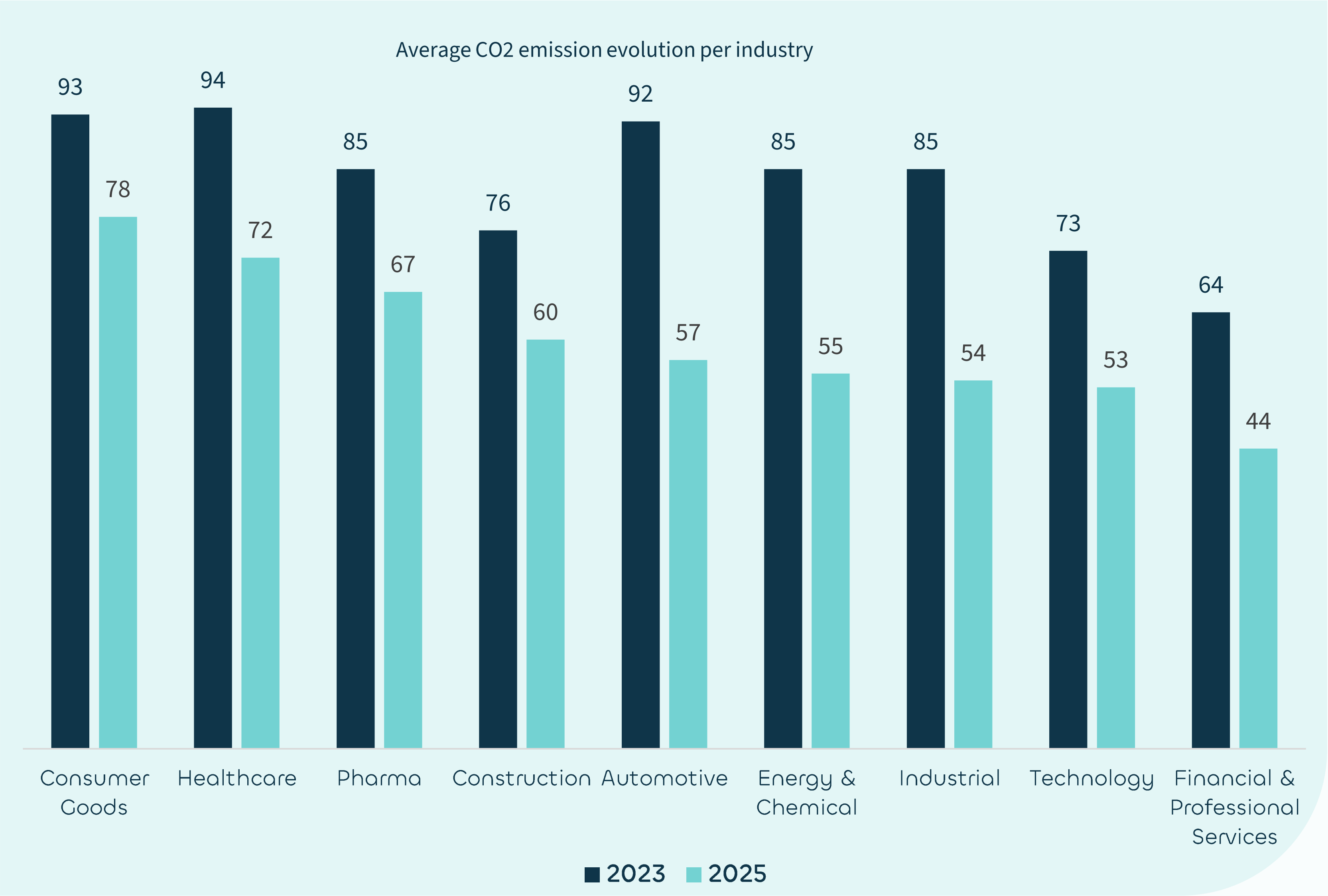
Hybrid vehicle share declines as fleets shift towards fully electric vehicles.



Hybrid vehicle share decreased across most industries, reflecting the growing shift towards BEVs.

Consumer Goods, Healthcare, and Automotive remain the sectors with the highest hybrid shares, while Automotive and Pharma were the only industries to record growth.

Average CO_2 emissions decline significantly across all industries.



Average CO_2 emissions fell across all industries between 2023 and 2025 as fleet electrification accelerated.

Financial & Professional Services, Technology, and Industrial achieved the lowest emission levels in 2025.

* OEM estimated emissions

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 & Chemical:	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.