Healthcare industry benchmark

2026

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Introduction

In this industry benchmark report, the most important fleet trends for Healthcare fleets in Europe are highlighted by comparing passenger car registrations between 2023 and 2025. The following definition of the industry has been applied: companies that provide services for diagnosing, preventing, treating and curing health conditions.

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:

Healthcare fleets are accelerating their transition toward electrification. BEV adoption more than doubled from 13% of new registrations in 2023 to 30% in 2025, while diesel share declined sharply from 26% to 10% over the same period.

Electrification maturity differs significantly across European markets. Belgium (87%), the UK (60%), and the Netherlands (53%) lead BEV adoption, while countries such as Hungary, Poland, and Romania continue to show a stronger preference for petrol and plug-in hybrid vehicles.

Growing adoption of electrified vehicles is reducing fleet emissions. By 2025, Belgium (10 g/km), the UK (24 g/km), and the Netherlands (42 g/km) recorded the lowest average CO_2 emissions, while Poland (129 g/km) and Hungary (128 g/km) remain the highest-emitting markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
SUV - C1	18%	SUV –C1	19%	SUV - C1	21%
SUV - D1	16%	SUV – D1	18%	SUV – D1	19%
C1	13%	SUV - C2	13%	SUV – C2	12%
SUV – C2	10%	C1	9%	SUV – D2	9%
D1	9%	SUV – D2	9%	C1	8%
D2	9%	D2	8%	D1	7%
SUV - D2	7%	D1	7%	D2	6%
C2	5%	B1	4%	C2	4%
SUV - B1	3%	C2	3%	SUV – B1	3%
B1	2%	SUV - B1	3%	MPV – C2	2%

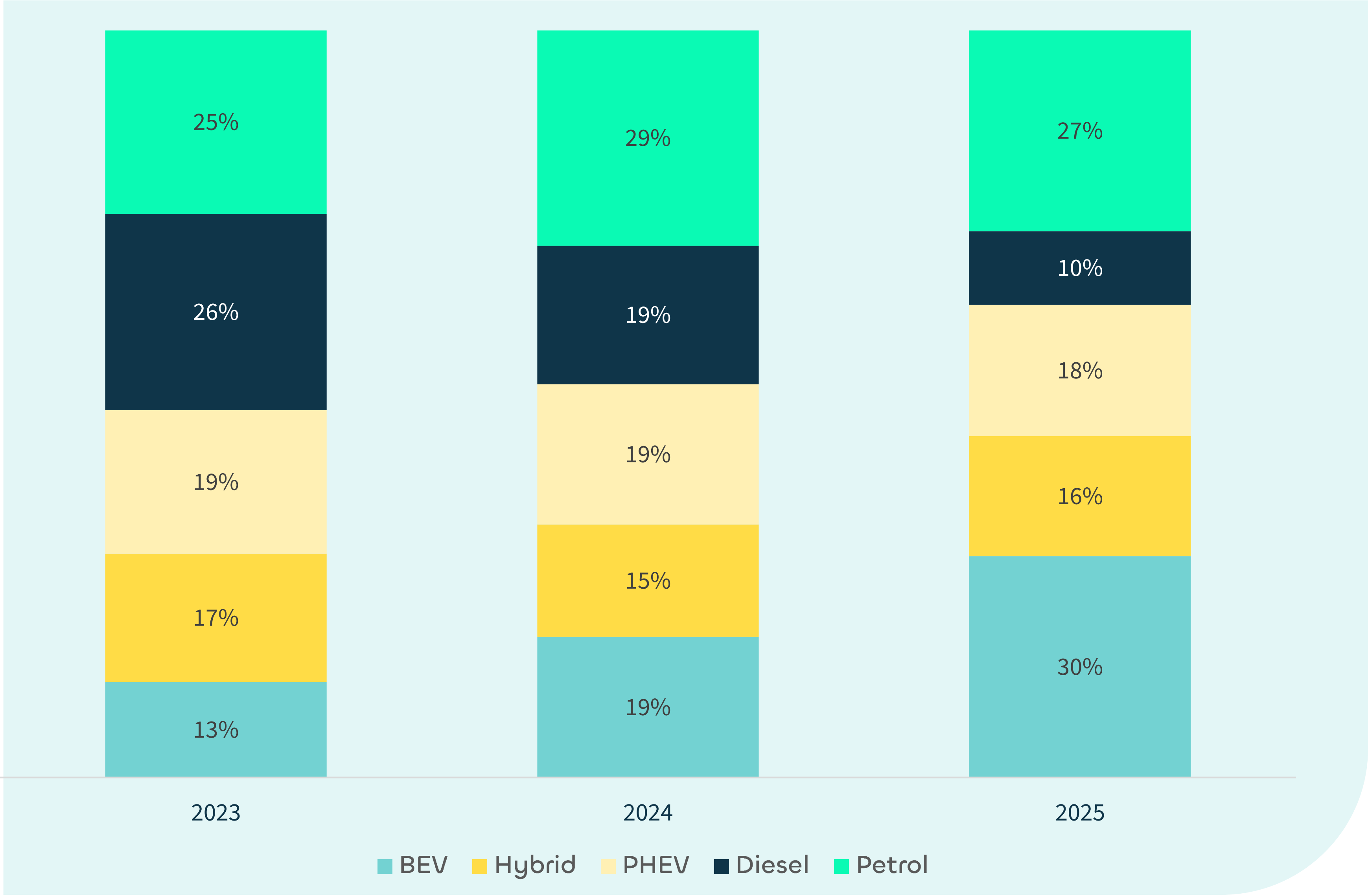
Most popular car segment: SUV - C1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
VOLKSWAGEN GOLF	4%	BMW X1	5%	BMW X1	4%
TOYOTA RAV4	4%	SKODA ENYAQ	4%	SKODA KAMIQ	4%
SKODA OCTAVIA	4%	VOLKSWAGEN TIGUAN	4%	VOLKSWAGEN TIGUAN	3%
TOYOTA COROLLA	3%	SKODA OCTAVIA	3%	SKODIA KODIAQ	3%
VOLKSWAGEN TIGUAN	3%	TOYOTA RAV4	3%	VOLKSWAGEN GOLF	3%
TESLA MODEL 3	3%	VOLKSWAGEN GOLF	3%	AUDI Q4 E-TRON	3%
BMW 3 SERIES	2%	TOYOTA COROLLA	3%	SKODA OCTAVIA	3%
TOYOTA C - HR	2%	VOLKSWAGEN POLO	3%	RENAULT AUSTRAL	2%
BMW X1	2%	VOLVO XC40	3%	MERCEDES-BENZ B CLASS	2%
AUDI A3	2%	SKODA KODIAQ	2%	TESLA MODEL Y	2%

Most popular car:
BMW X1

BEVs gain momentum in Healthcare fleets as diesel adoption continues to decline

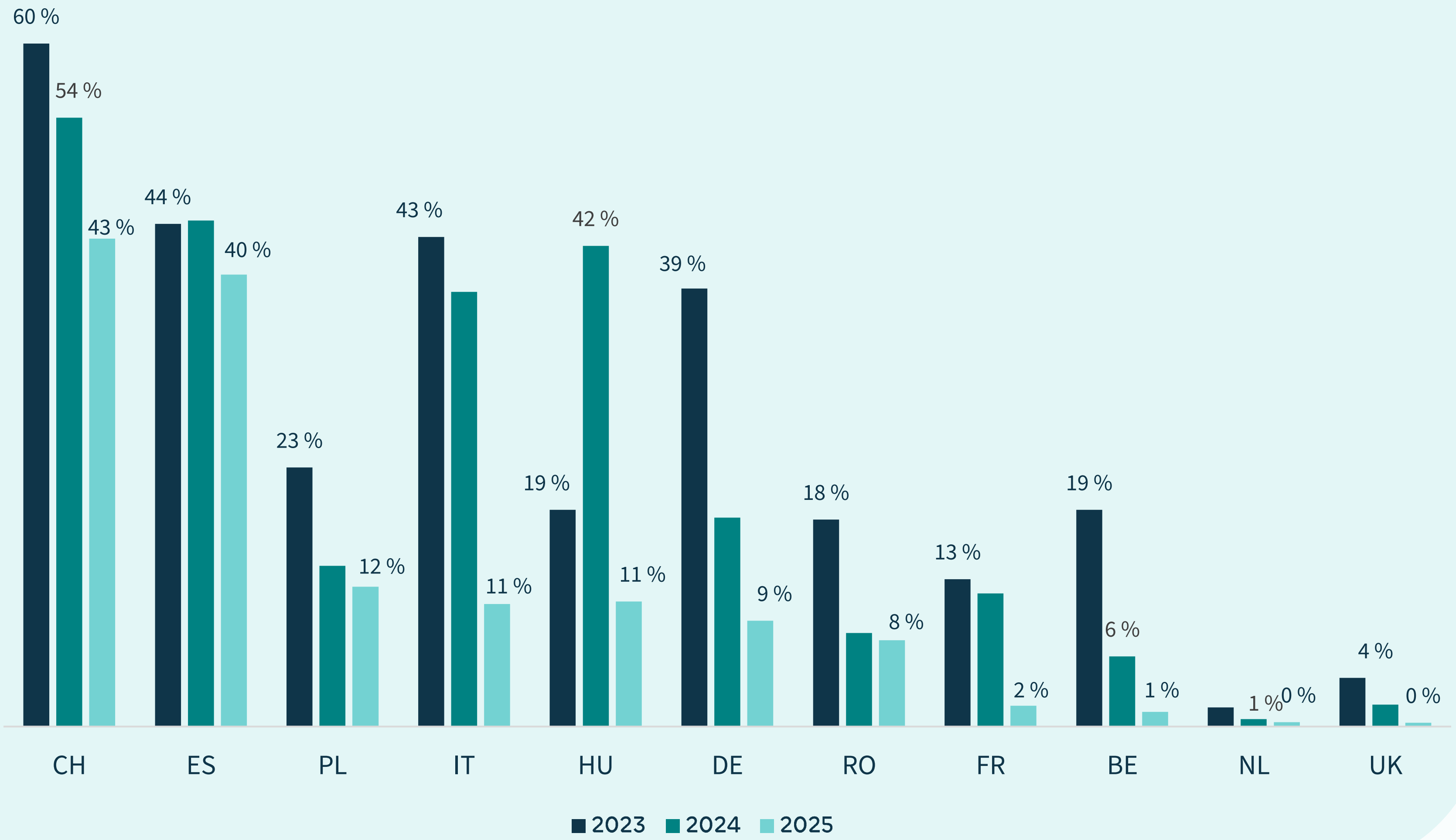


BEV adoption in Healthcare fleets has accelerated significantly, increasing from 13% of new registrations in 2023 to 30% in 2025.

At the same time, diesel share has fallen sharply from 26% to 10%, highlighting an ongoing transition toward electrified vehicle fleets.

While petrol remains a substantial part of the powertrain mix, growth in BEVs is driving the market shift, reflecting Healthcare organizations' increasing focus on fleet electrification and emissions reduction.

Diesel adoption continues to decline across Healthcare fleets

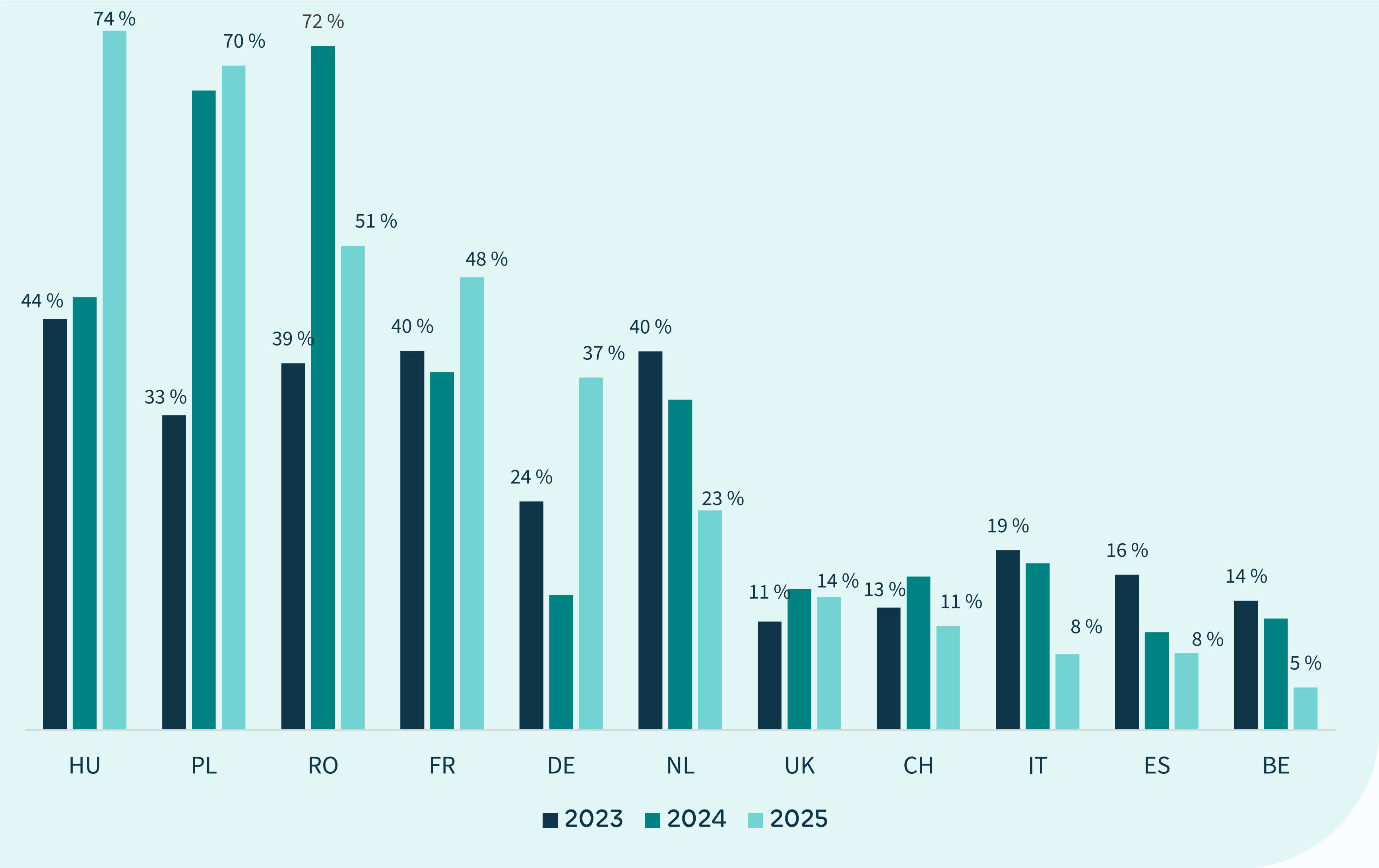


Diesel's share of new Healthcare fleet registrations has fallen significantly between 2023 and 2025 across most European markets.

Some of the largest declines are observed in Italy (43% to 11%), Hungary (19% to 11%), Germany (39% to 9%), and Belgium (19% to 1%).

While diesel remains a relevant powertrain in selected markets such as Switzerland (43%) and Spain (40%), the overall trend points to a continued shift toward alternative powertrains as Healthcare organizations advance fleet electrification efforts

Petrol adoption remains strong in several Healthcare markets despite ongoing electrification

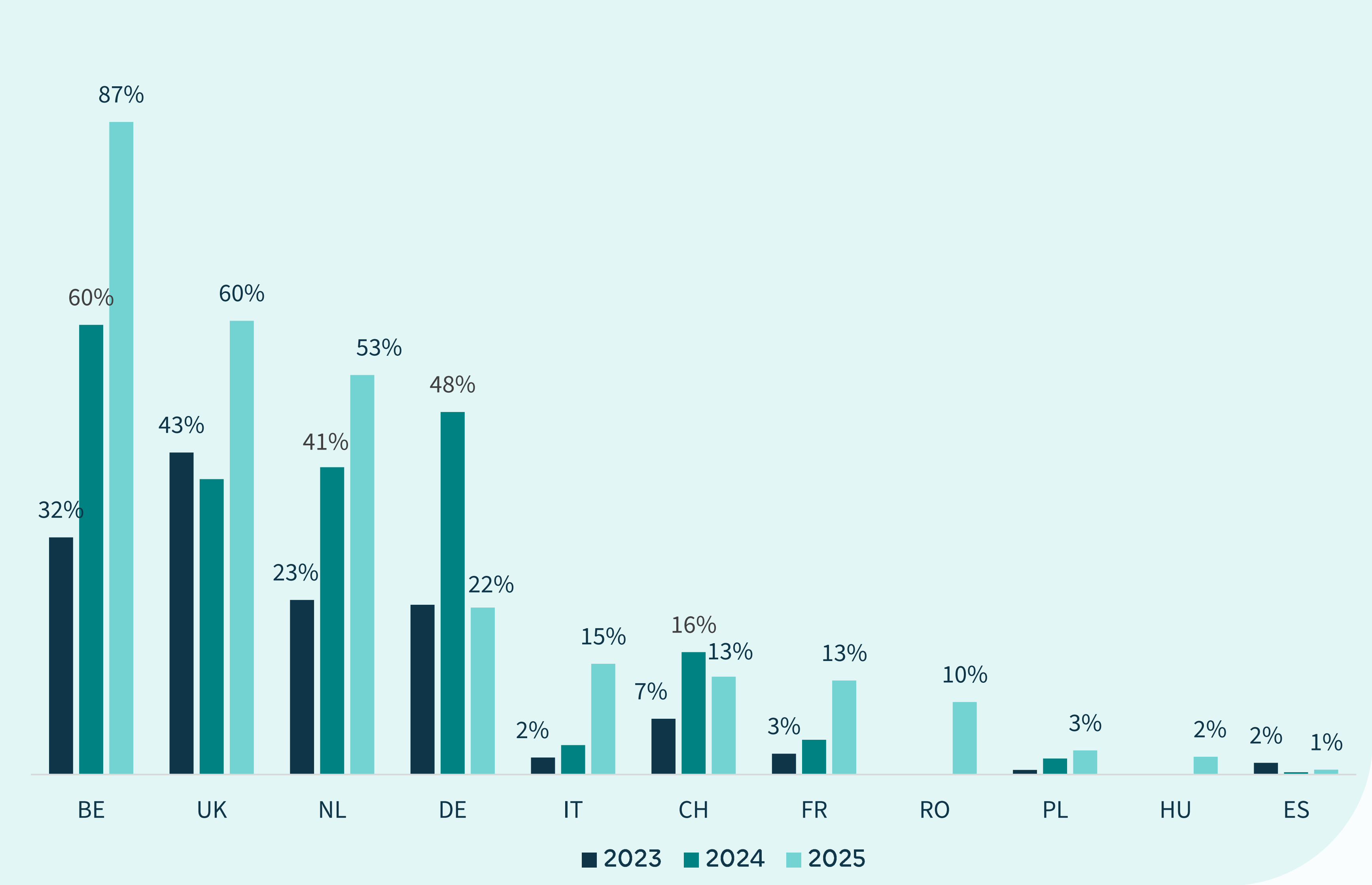


Petrol continues to represent a significant share of Healthcare fleet registrations across a number of European markets.

Adoption has increased notably in Hungary (44% to 74%), Poland (33% to 70%), Romania (39% to 51%), and Germany (24% to 37%) between 2023 and 2025.

Overall, petrol remains an important component of the Healthcare fleet mix as organizations transition away from diesel.

BEV adoption accelerates across Healthcare fleets, led by Belgium, the UK and the Netherlands

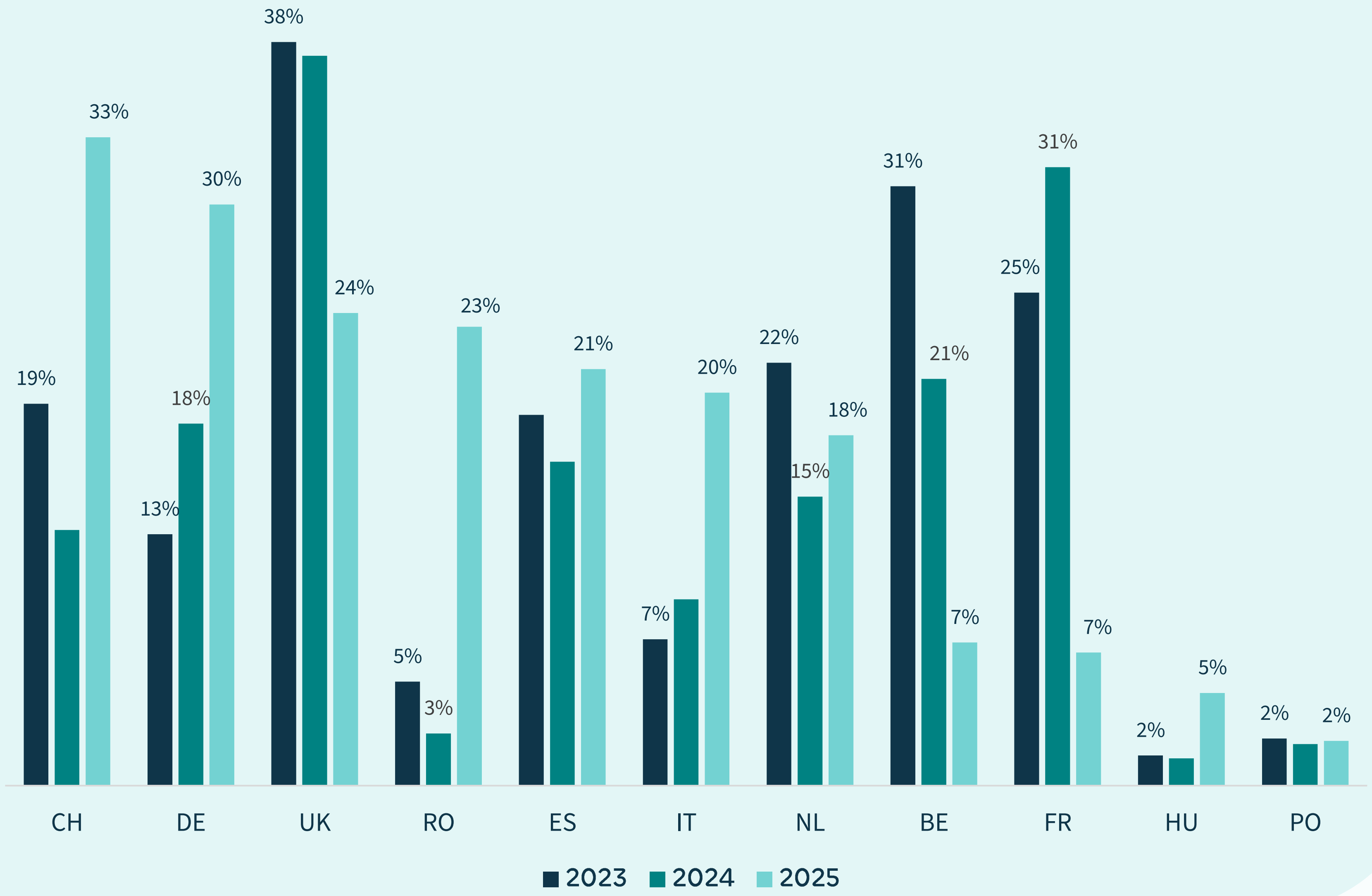


BEV adoption in Healthcare fleets continues to gain momentum across Europe, with several markets reaching majority-electric new registrations by 2025.

Belgium leads the transition at 87%, followed by the UK (60%) and the Netherlands (53%).

Growth is evident across most markets, including Italy, France and Romania, although adoption levels vary considerably by country.

PHEV adoption remains stable as Healthcare fleets progress toward electrification

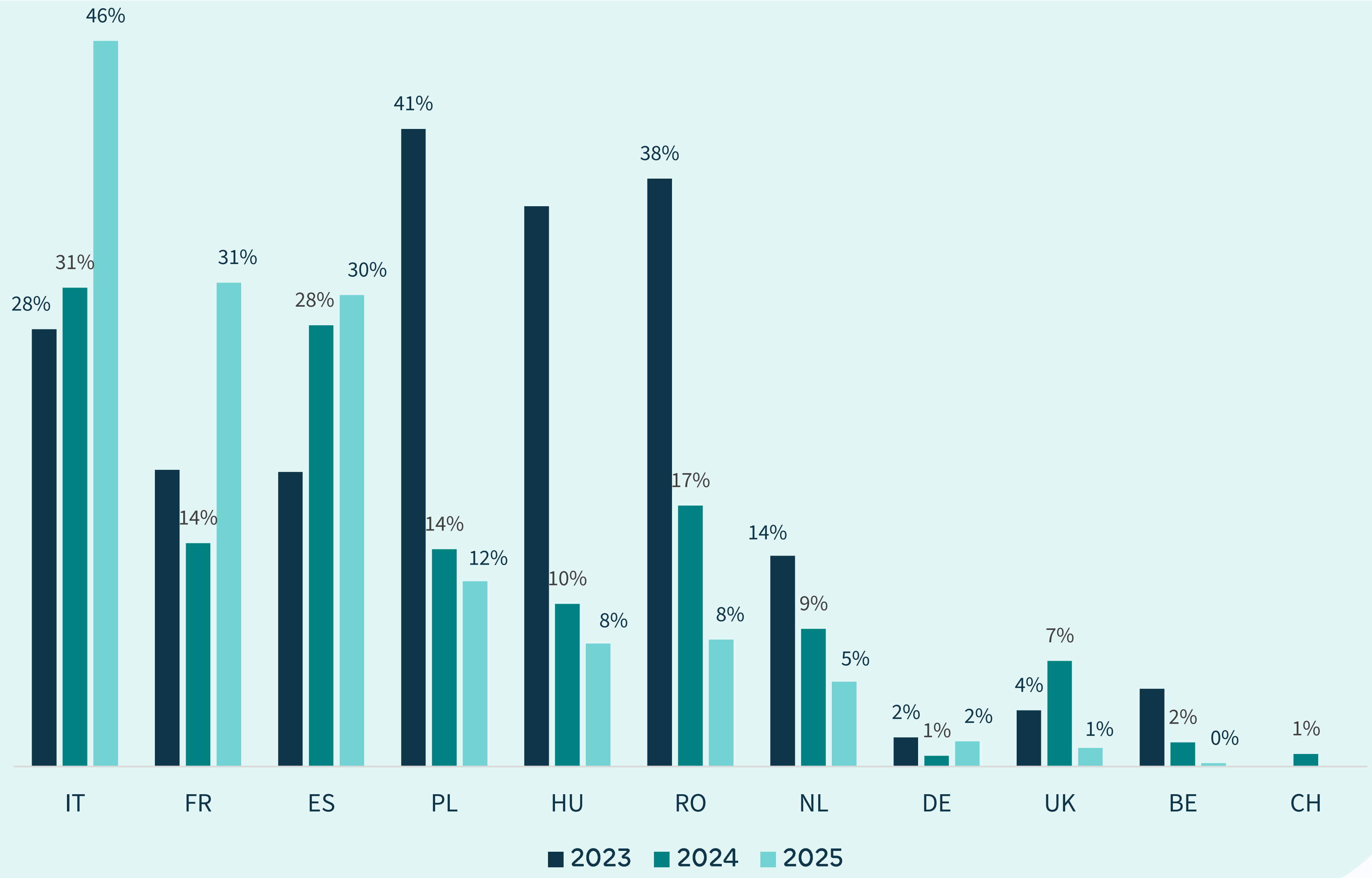


Plug-in hybrid vehicles continue to play a significant role in Healthcare fleet electrification, although adoption trends vary considerably by market.

PHEV registrations increased between 2023 and 2025 in countries such as Switzerland (19% to 33%), Germany (13% to 30%), Romania (5% to 23%), and Italy (7% to 20%).

PHEV adoption declined in several mature electrification markets, including Belgium (31% to 7%), France (25% to 7%), and the UK (38% to 24%), suggesting a gradual shift from plug-in hybrids toward fully electric vehicles.

Hybrid vehicles continue to support Healthcare fleet electrification

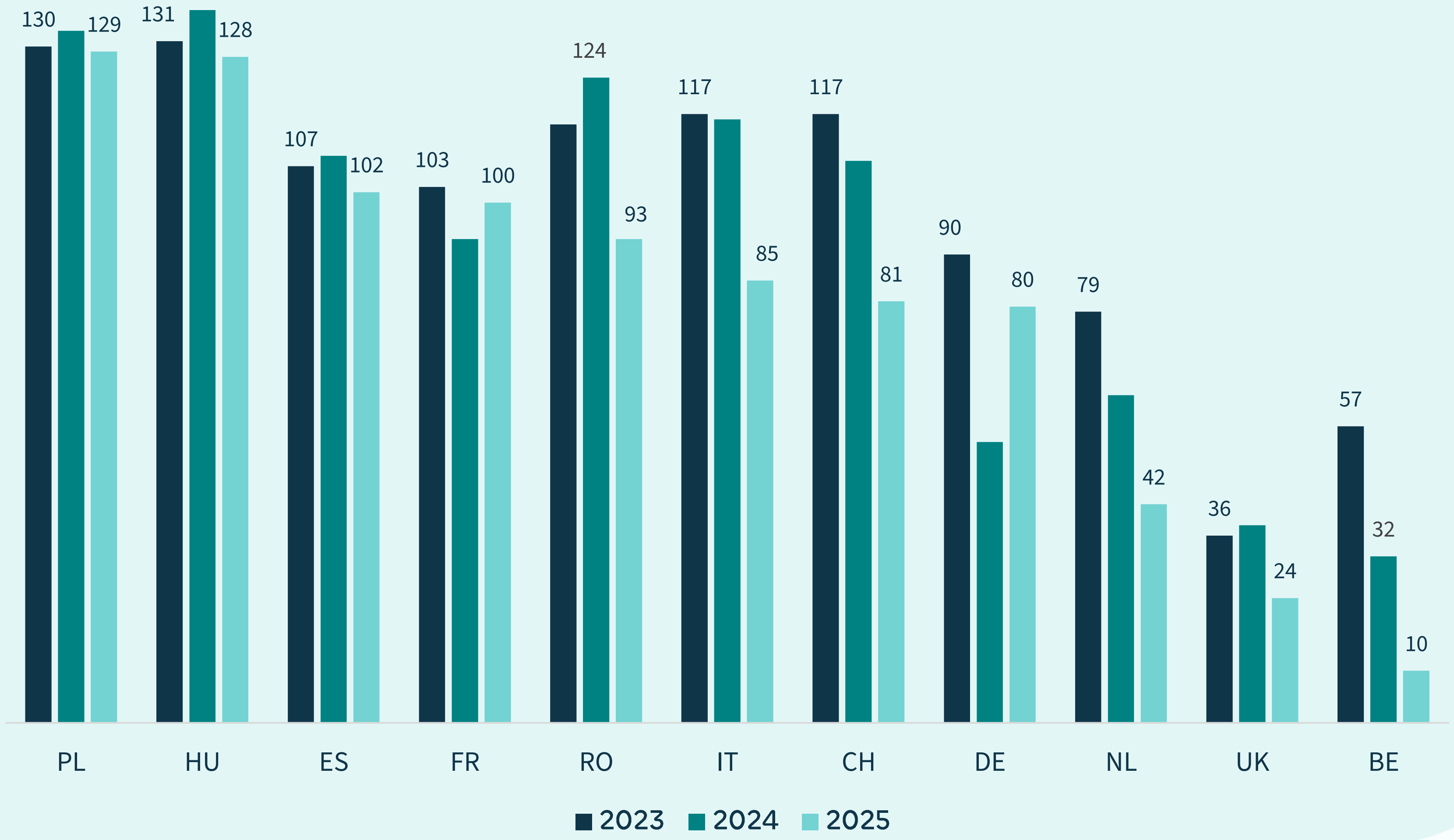


Hybrid vehicles remain a consistent component of the Healthcare fleet mix.

As Healthcare organizations continue to reduce reliance on diesel vehicles, hybrids offer a practical pathway to lower emissions while maintaining operational flexibility.

However, growing BEV adoption suggests that hybrid vehicles increasingly serve as a transitional technology within broader electrification strategies.

CO_2 emissions continue to decline as Healthcare fleets electrify



Average CO_2 emissions from new Healthcare fleet registrations have decreased across most European markets between 2023 and 2025.

The largest reductions are observed in Belgium (57g/km to 10g/km), the Netherlands (79g/km to 42g/km), Germany (90g/km to 80g/km), Switzerland (117g/km to 81g/km), and Italy (117g/km to 85g/km).

While emission levels continue to vary by market, the overall trend highlights ongoing progress toward lower-carbon fleet mobility across the Healthcare sector.

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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