Industrial industry benchmark

2026

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Introduction

In this industry benchmark report, the most important fleet trends for Industrial fleets in Europe are highlighted by comparing passenger car registrations between 2023 and 2025. The following definition of the industry has been applied: companies producing or maintaining physical material or products for the B2B sector.

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: - update

Industrial fleets are rapidly transitioning toward electrification. BEV adoption increased from 24% of new registrations in 2023 to 45% in 2025, while diesel share declined from 30% to 15% over the same period.

Electrification maturity varies considerably across European markets. Denmark (87%), Austria (82%), Finland (80%) and Belgium (79%) lead BEV adoption, while markets such as Romania, Spain and the Czech Republic continue to report lower levels of fleet electrification.

Growing adoption of electrified vehicles is reducing fleet emissions. By 2025, Sweden (8 g/km), Denmark (9 g/km), Belgium (10 g/km) and Finland (13 g/km) recorded the lowest average CO_2 emissions, while the Czech Republic (126 g/km), Hungary (112 g/km) and Poland (107 g/km) remained the highest-emitting markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
SUV - D1	18%	C1	18%	SUV - D1	19%
C1	16%	SUV – D1	17%	SUV – C1	15%
D1	15%	SUV – C1	13%	D1	12%
SUV – C1	14%	D1	12%	SUV – C2	10%
D2	9%	SUV – C2	9%	C1	10%
SUV – C2	8%	D2	8%	SUV – D2	8%
SUV – D2	7%	SUV-D2	7%	D2	6%
SUV - B1	2%	E2	3%	E2	5%
C2	2%	MPV-C1	2%	E1	4%
E2	2%	E1	2%	SUV – E2	2%

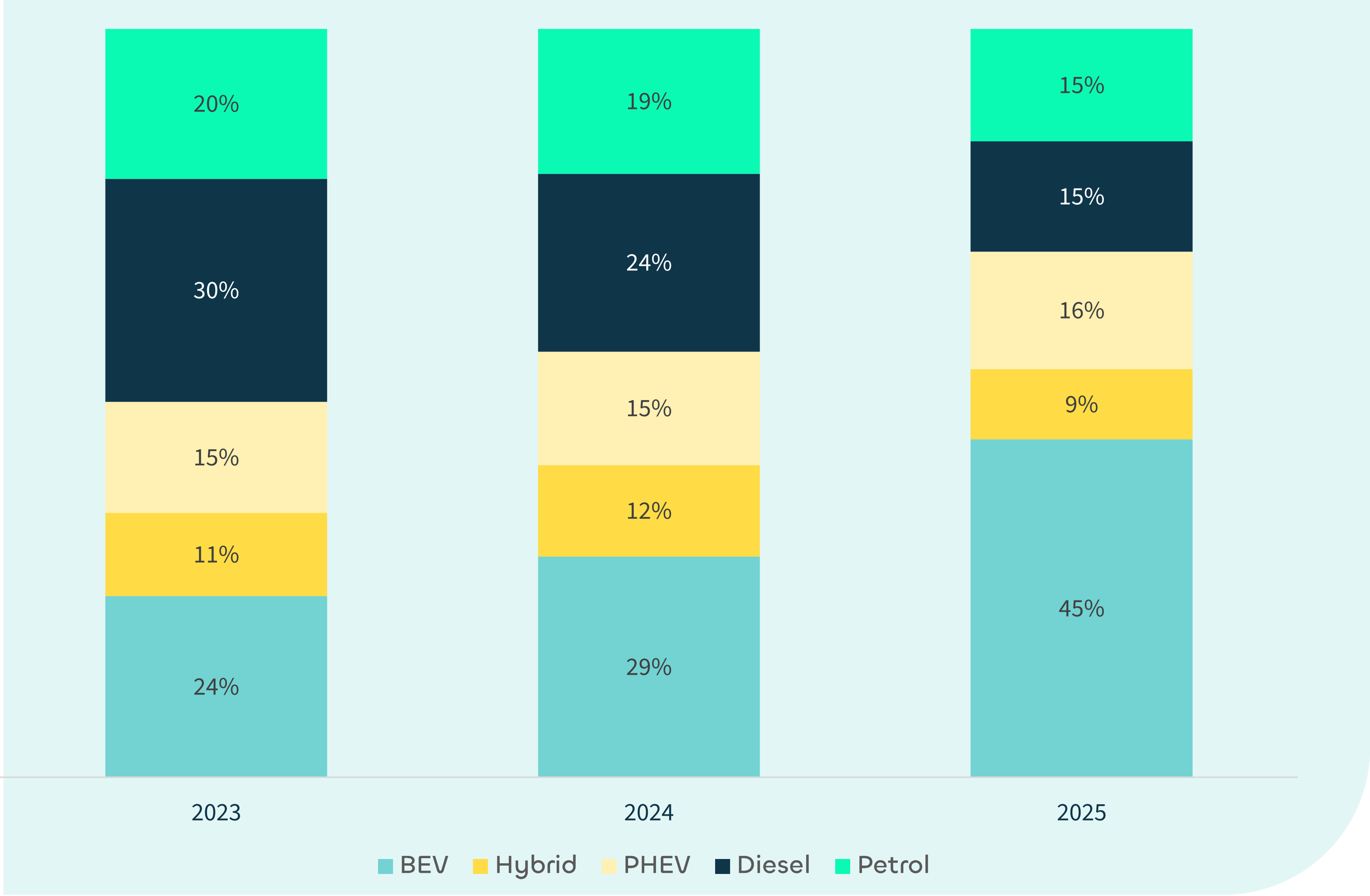
Most popular car segment: SUV – D1

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
SKODA OCTAVIA	7%	SKODA OCTAVIA	5%	SKODA OCTAVIA	6%
TESLA MODEL Y	5%	SKODA ENYAQ	4%	SKODA ENYAQ	5%
SKODA ENYAQ	4%	TOYOTA COROLLA	4%	VOLKSWAGEN ID.7	4%
TOYOTA COROLLA	4%	VOLKSWAGEN POLO	3%	VOLKSWAGEN TIGUAN	3%
VOLKSWAGEN PASSAT	3%	OPEL ASTRA	3%	BMW X1	3%
VOLKSWAGEN TIGUAN	2%	BMW X1	3%	AUDI Q6 E-TRON	3%
SKODA SUPERB	2%	TESLA MODEL Y	3%	SKODA KODIAQ	2%
VOLKSWAGEN ID.4	2%	PEUGEOT 308	3%	VOLKSWAGEN ID.4	2%
VOLVO XC40	2%	VOLKSWAGEN TIGUAN	3%	VOLKSWAGEN PASSAT	2%
VOLKSWAGEN GOLF	2%	AUDI Q4 E-TRON	2%	TESLA MODEL Y	2%

Most popular car:
SKODA OCTAVIA

BEVs become the dominant powertrain across European fleets

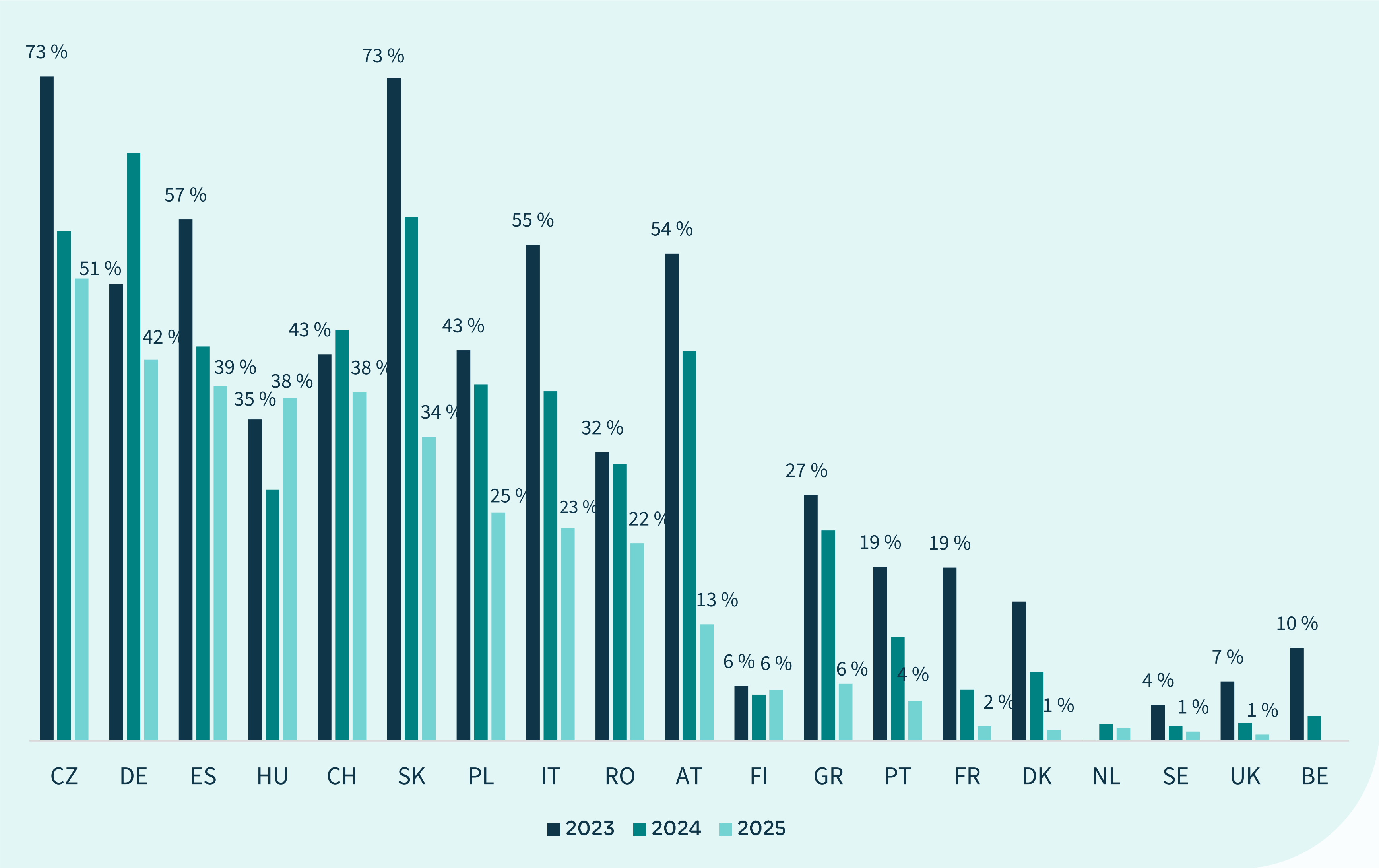


Fleet electrification accelerated between 2023 and 2025, with BEVs increasing from 24% to 45% of new registrations and becoming the largest powertrain category.

At the same time, diesel adoption declined from 30% to 15%, while petrol, hybrid and PHEV shares remained relatively stable.

The evolving powertrain mix highlights the continued shift toward lower-emission mobility across European fleets.

Diesel adoption continues to decline across European fleets

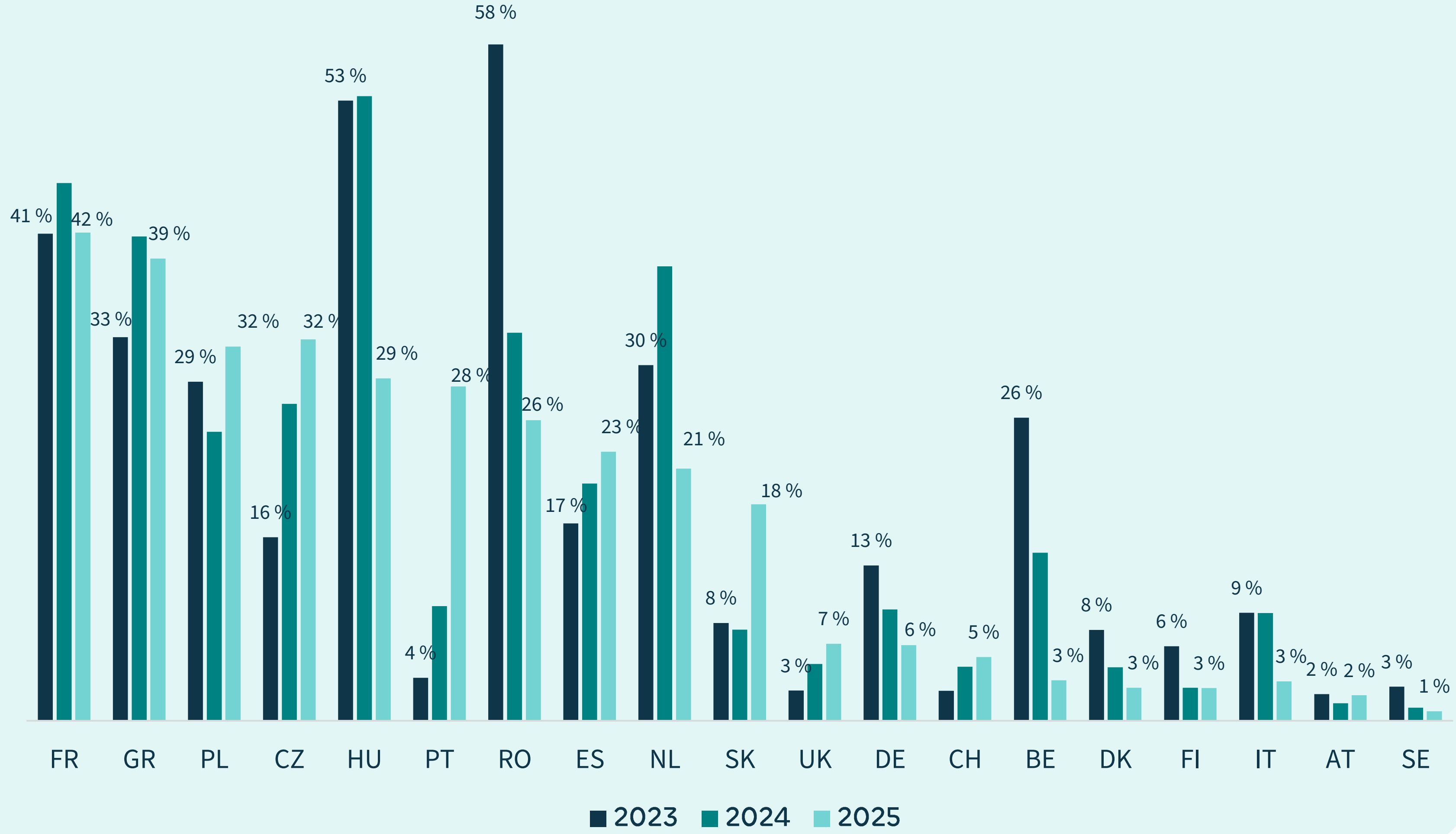


Diesel's share of new fleet registrations has fallen significantly between 2023 and 2025 across most European markets.

Some of the largest declines were recorded in Austria (54% to 13%), Slovakia (73% to 34%), Italy (55% to 23%), Greece (27% to 6%) and France (19% to 2%).

While diesel remains a relevant powertrain in markets such as the Czech Republic (51%), Germany (42%), Spain (39%) and Switzerland (38%), the overall trend points to a continued shift away from conventional combustion powertrains and toward electrified mobility.

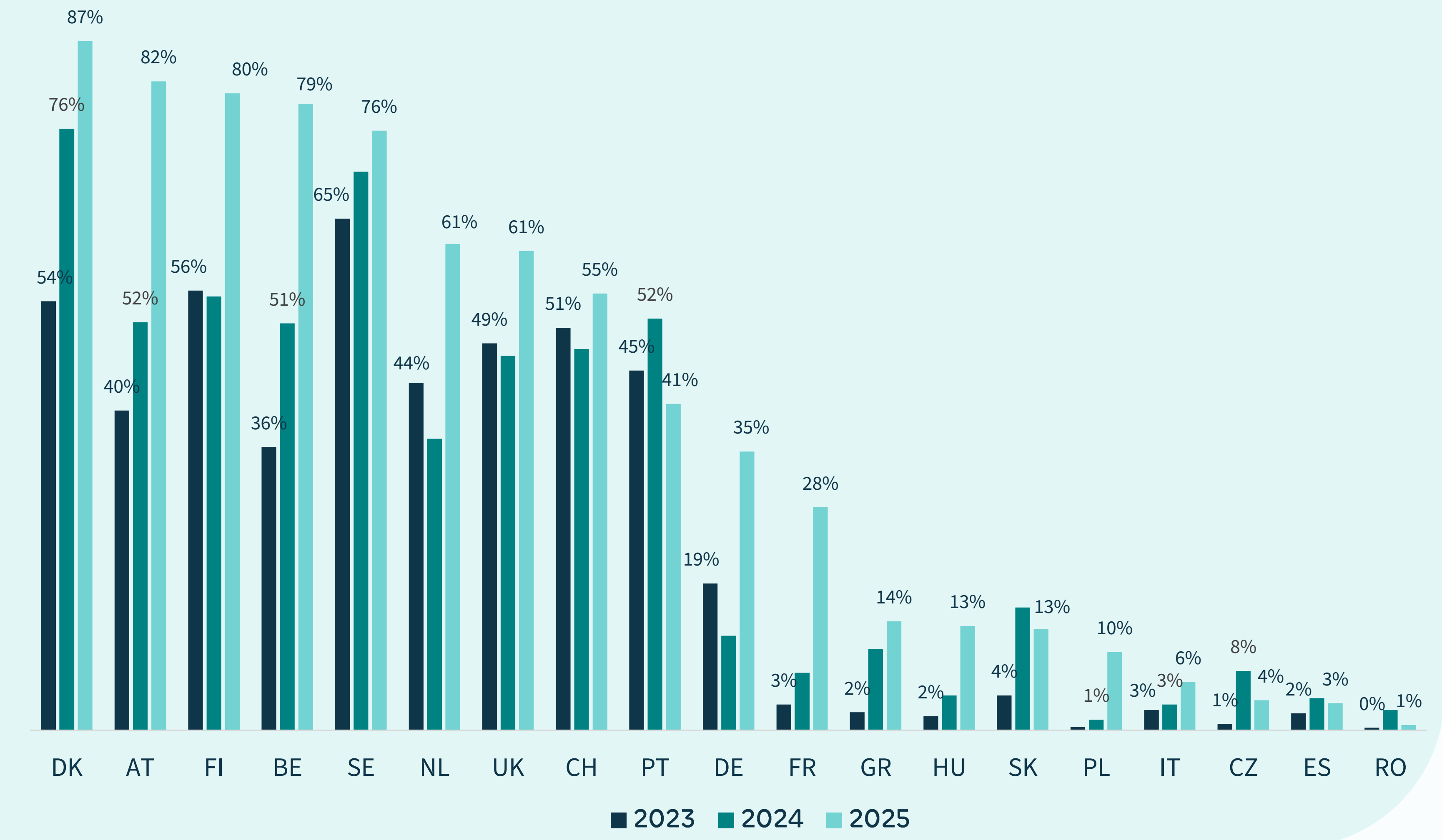
Petrol adoption remains concentrated in selected European markets



Petrol continues to represent a significant share of new fleet registrations in several European markets, particularly France (42%), Greece (39%), Czech Republic (32%), Poland (32%) and Hungary (29%) in 2025.

While petrol adoption has increased in countries such as Portugal, Slovakia and the Czech Republic, it remains limited across many mature electrification markets, highlighting different pathways toward fleet decarbonisation across Europe.

BEV adoption accelerates across European fleets

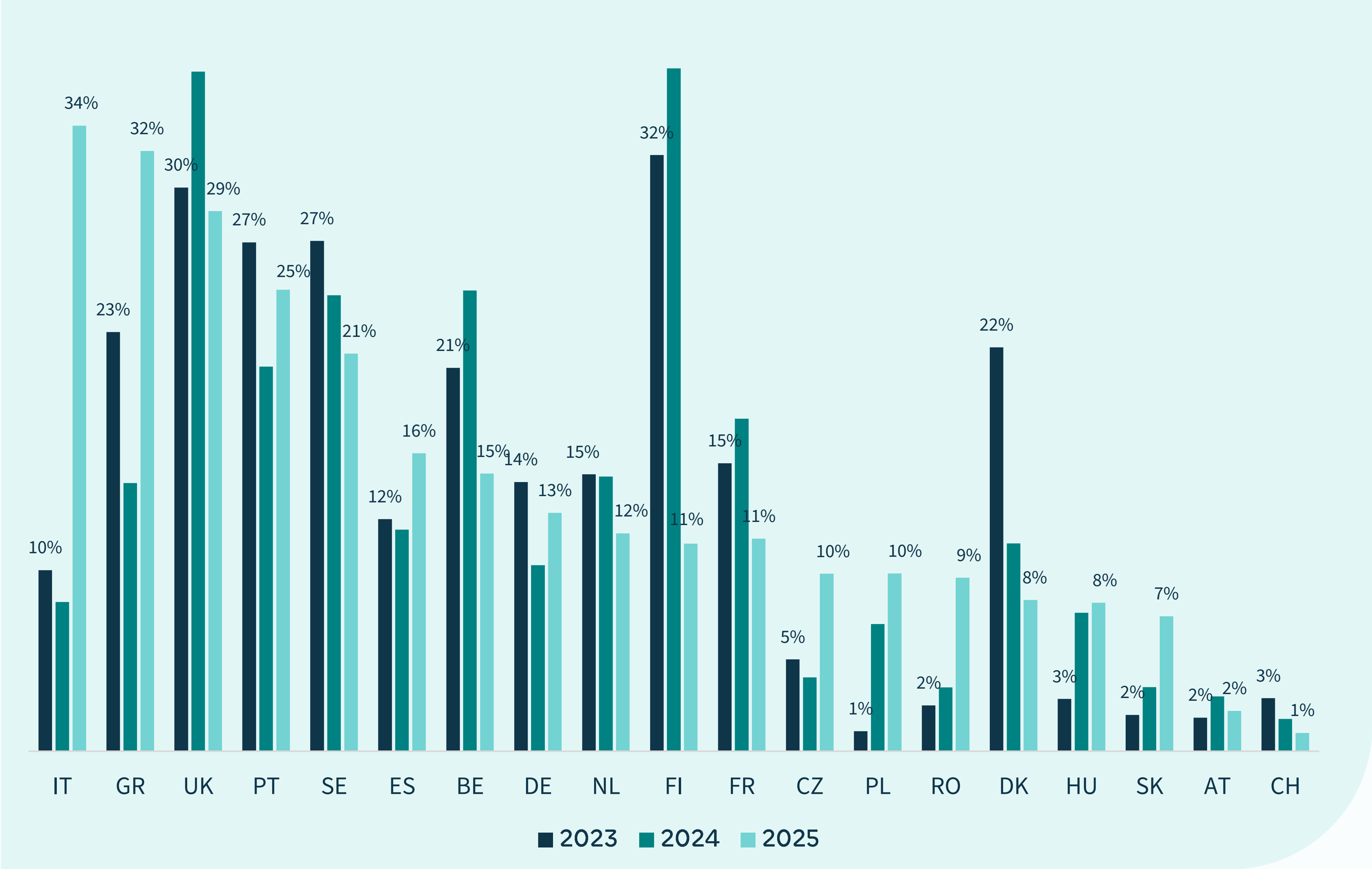


BEV adoption continues to gain momentum across Europe, with several markets reaching majority-electric new registrations by 2025.

Denmark (87%), Austria (82%), Finland (80%), Belgium (79%) and Sweden (76%) lead the transition, demonstrating the rapid pace of fleet electrification in Northern and Western Europe.

While adoption levels vary considerably between countries, BEV registrations increased in most markets between 2023 and 2025, reinforcing the shift toward fully electric fleet mobility.

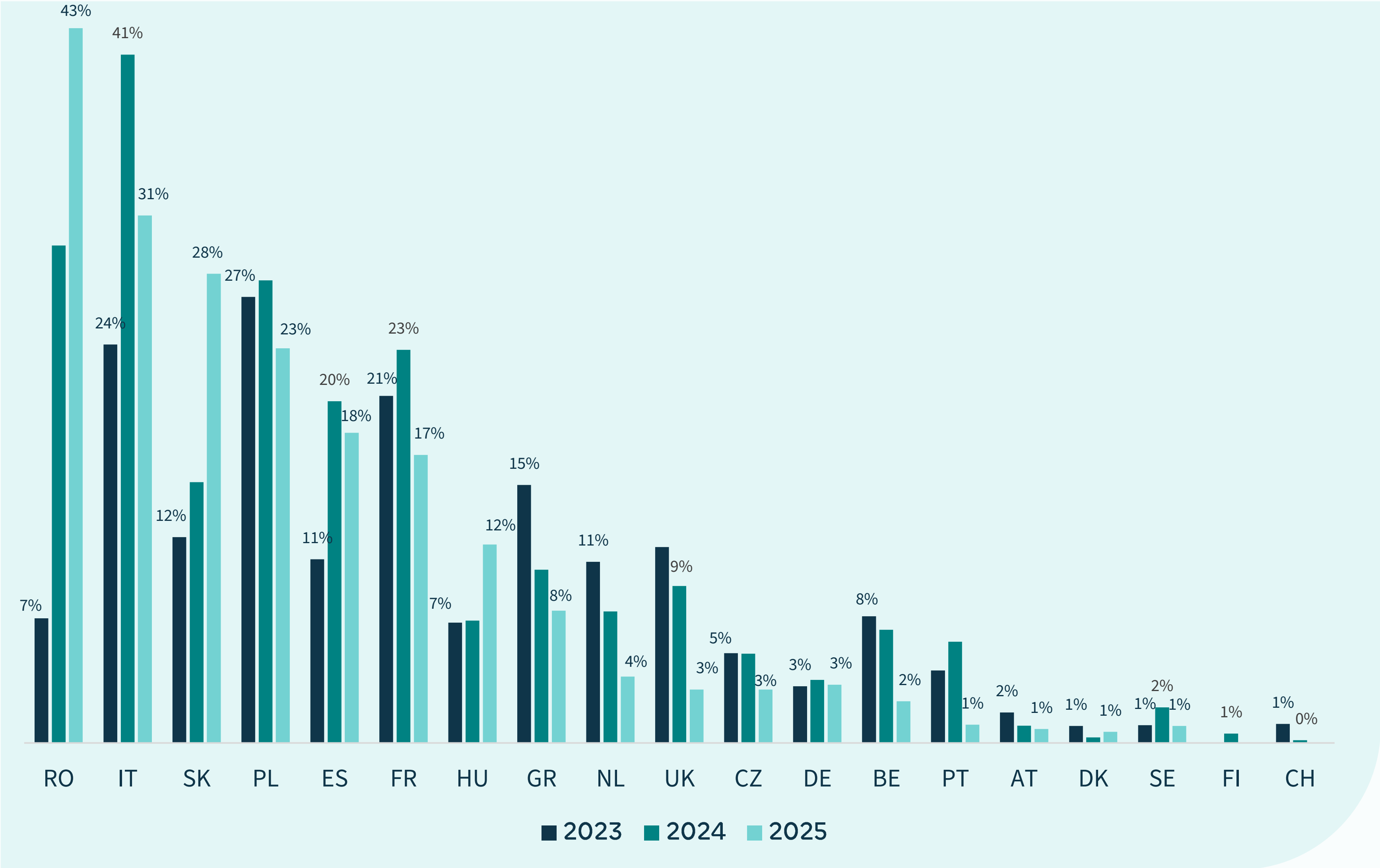
PHEV adoption remains an important transition pathway across European fleets



Plug-in hybrid vehicles continue to play a significant role in fleet electrification, although adoption levels vary considerably by market. In 2025, PHEV shares were highest in Italy (34%), Greece (32%), the UK (29%), Portugal (25%) and Sweden (21%).

While PHEV adoption has increased in several markets, declining shares in countries with strong BEV uptake suggest that some fleets are increasingly transitioning directly to fully electric vehicles.

Hybrid adoption remains concentrated in selected European markets

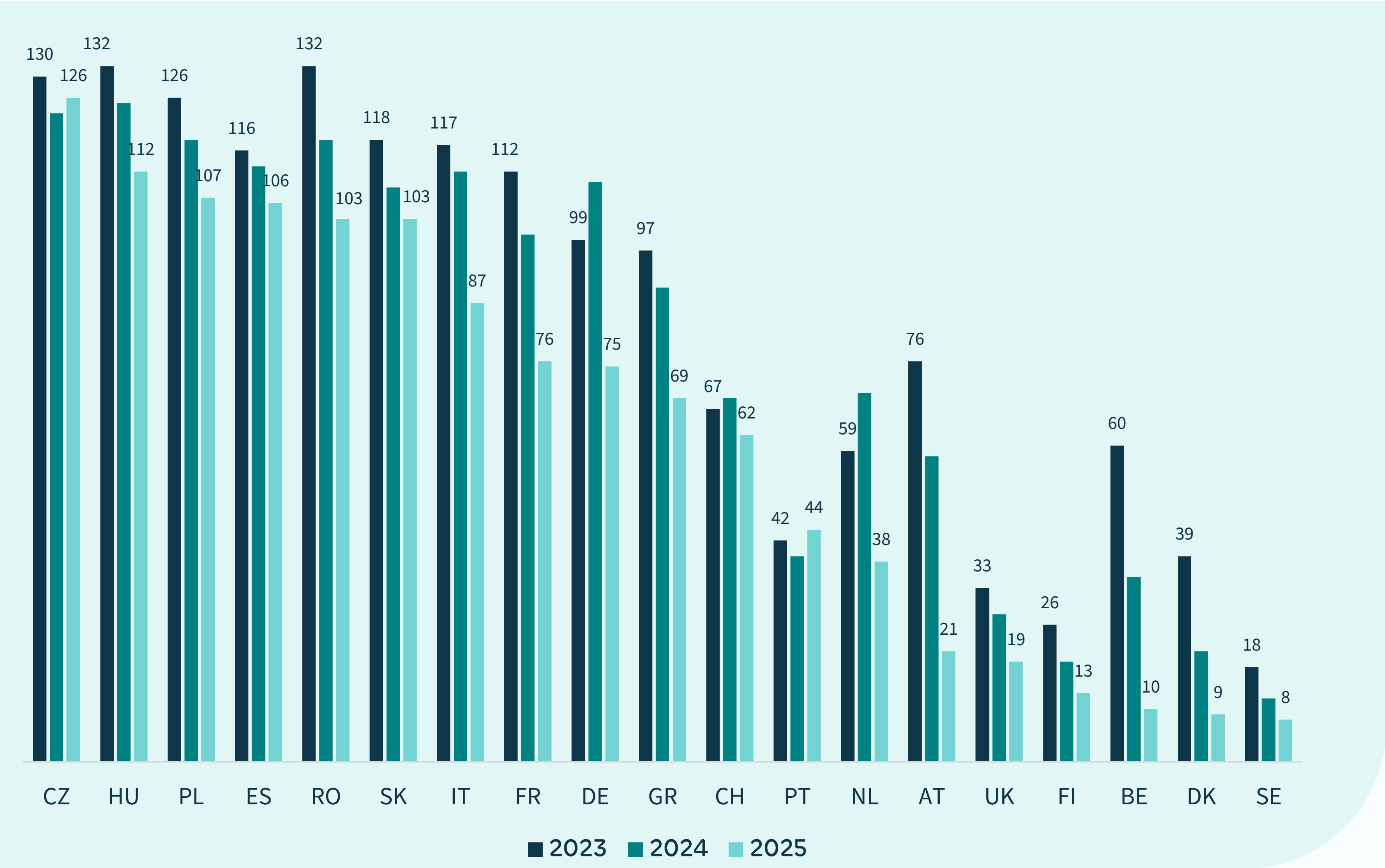


Hybrid vehicles continue to play an important role in fleet electrification, particularly in markets where organizations are balancing emissions reductions with operational flexibility.

In 2025, hybrid adoption was highest in Romania (43%), Italy (31%), Slovakia (28%) and Poland (23%).

While hybrid uptake varies considerably across Europe, the powertrain remains a relevant alternative for fleets that are not yet transitioning directly to fully electric vehicles.

CO_2 emissions continue to decline across European fleets



Average CO_2 emissions from new fleet registrations decreased in most European markets between 2023 and 2025, reflecting the growing adoption of electrified powertrains.

The lowest emission levels in 2025 were recorded in Sweden (8 g/km), Denmark (9 g/km), Belgium (10 g/km) and Finland (13 g/km), while the Czech Republic (126 g/km), Hungary (112 g/km) and Poland (107 g/km) remain the highest-emitting markets.

Overall, the trend highlights continued progress toward lower-carbon fleet mobility across Europe.

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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