Pharmaceutical industry benchmark

2026

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Introduction

In this industry benchmark report, the most important fleet trends for Pharmaceutical fleets in Europe are highlighted by comparing passenger car registrations between 2023 and 2025. The following definition of the industry has been applied: companies involved in developing, producing and distributing pharmaceutical products.

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:

Pharmaceutical fleets are steadily accelerating their transition toward electrification. BEV adoption increased from 25% of new registrations in 2023 to 37% in 2025, while diesel share declined from 35% to 21% over the same period.

Electrification maturity varies significantly across European markets. Denmark (81%), Austria (74%), Belgium (73%), the UK (72%) and the Netherlands (72%) lead BEV adoption, while Croatia, Hungary and Greece continue to report lower levels of fleet electrification.

Growing adoption of electrified vehicles is reducing fleet emissions. By 2025, Belgium (9 g/km), Finland (10 g/km), the United Kingdom (11 g/km) and Sweden (15 g/km) recorded the lowest average CO_2 emissions, while Slovakia (119 g/km), Hungary (118 g/km) and Ukraine (118 g/km) remained the highest-emitting markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
SUV - C1	19%	SUV – C2	18%	SUV – C2	20%
SUV – C2	16%	SUV – D1	17%	SUV – C1	15%
SUV - D1	15%	SUV – C1	13%	SUV - D1	13%
D1	12%	D1	12%	SUV – D2	11%
D2	10%	D2	9%	D1	10%
SUV – D2	8%	SUV - D2	8%	D2	9%
C1	6%	C1	7%	E2	5%
C2	4%	C2	3%	C1	4%
E2	2%	E2	2%	E1	3%
MPV – C2	1%	MPV – C2	2%	C2	3%

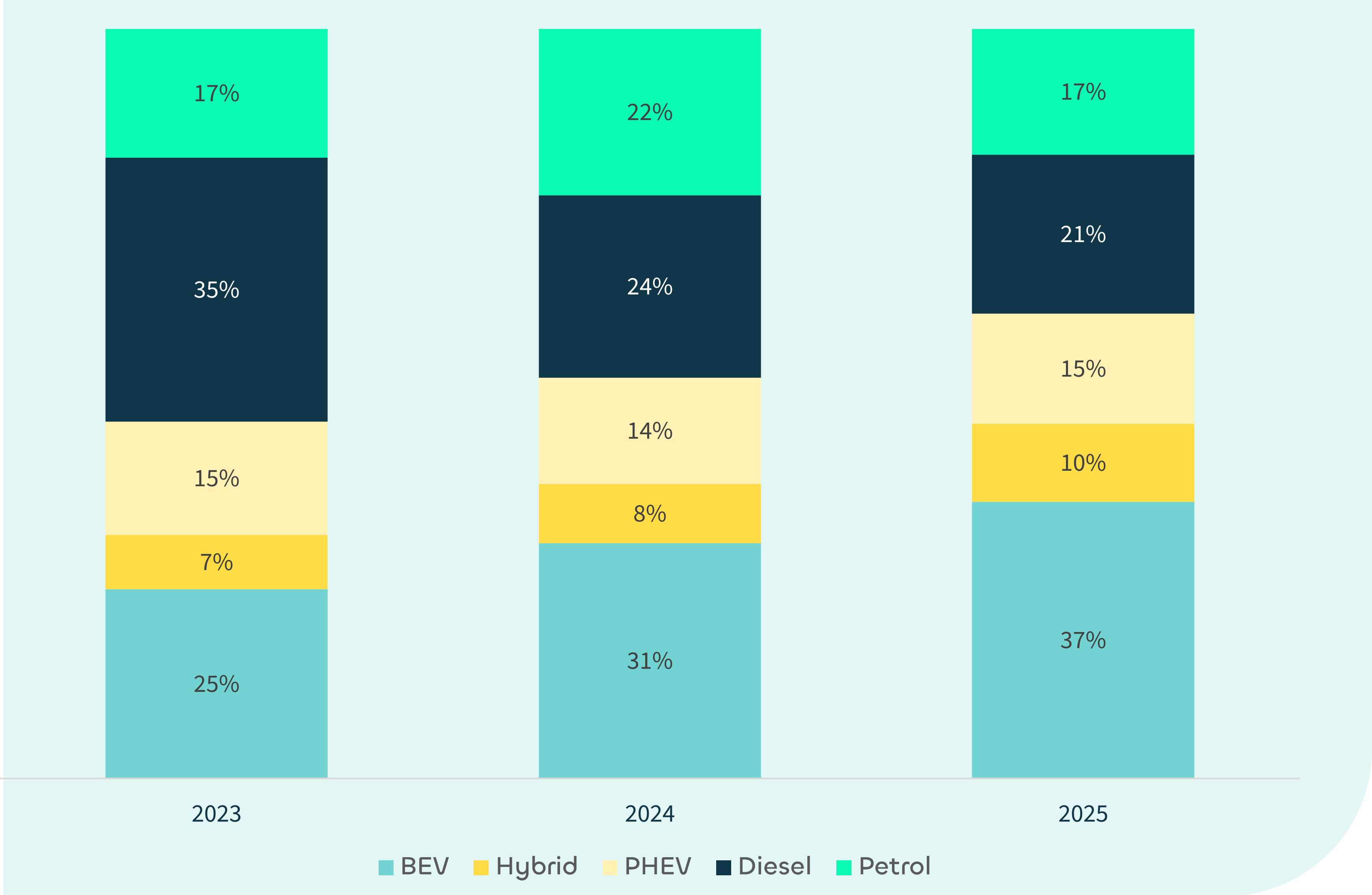
Most popular car segment: SUV – C2

Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
VOLKSWAGEN ID.4	5%	BMW X1	10%	BMW X1	6%
BMW X1	4%	TESLA MODEL 3	4%	VOLKSWAGEN TIGUAN	5%
SKODA OCTAVIA	4%	VOLKSWAGEN TIGUAN	4%	VOLKSWAGEN ID.7	4%
PEUGEOT 3008	4%	TESLA MODEL Y	4%	SKODA OCTAVIA	3%
VOLKSWAGEN TIGUAN	4%	SKODA OCTAVIA	3%	MERCEDES-BENZ GLC CLASS	3%
VOLKSWAGEN PASSAT	3%	AUDI Q3	3%	VOLKSWAGEN ID.4	3%
TESLA MODEL Y	3%	VOLVO XC40	3%	TESLA MODEL 3	2%
TOYOTA RAV4	3%	VOLKSWAGEN GOLF	2%	VOLKSWAGEN PASSAT	2%
AUDI Q3	2%	BMW iX1	2%	AUDI Q6 E-TRON	2%
VOLKSWAGEN GOLF	2%	MERCEDES-BENZ GLC CLASS	2%	AUDI Q4 E-TRON	2%

Most popular car:
BMW X1

BEVs become the leading powertrain in Pharmaceutical fleets



Pharmaceutical fleets are accelerating their transition toward electrification, with BEVs increasing from 25% of new registrations in 2023 to 37% in 2025.

Over the same period, diesel adoption declined significantly from 35% to 21%.

While petrol, PHEV and hybrid vehicles continue to represent a meaningful share of registrations, the evolving powertrain mix highlights the sector's ongoing shift toward lower-emission fleet mobility.

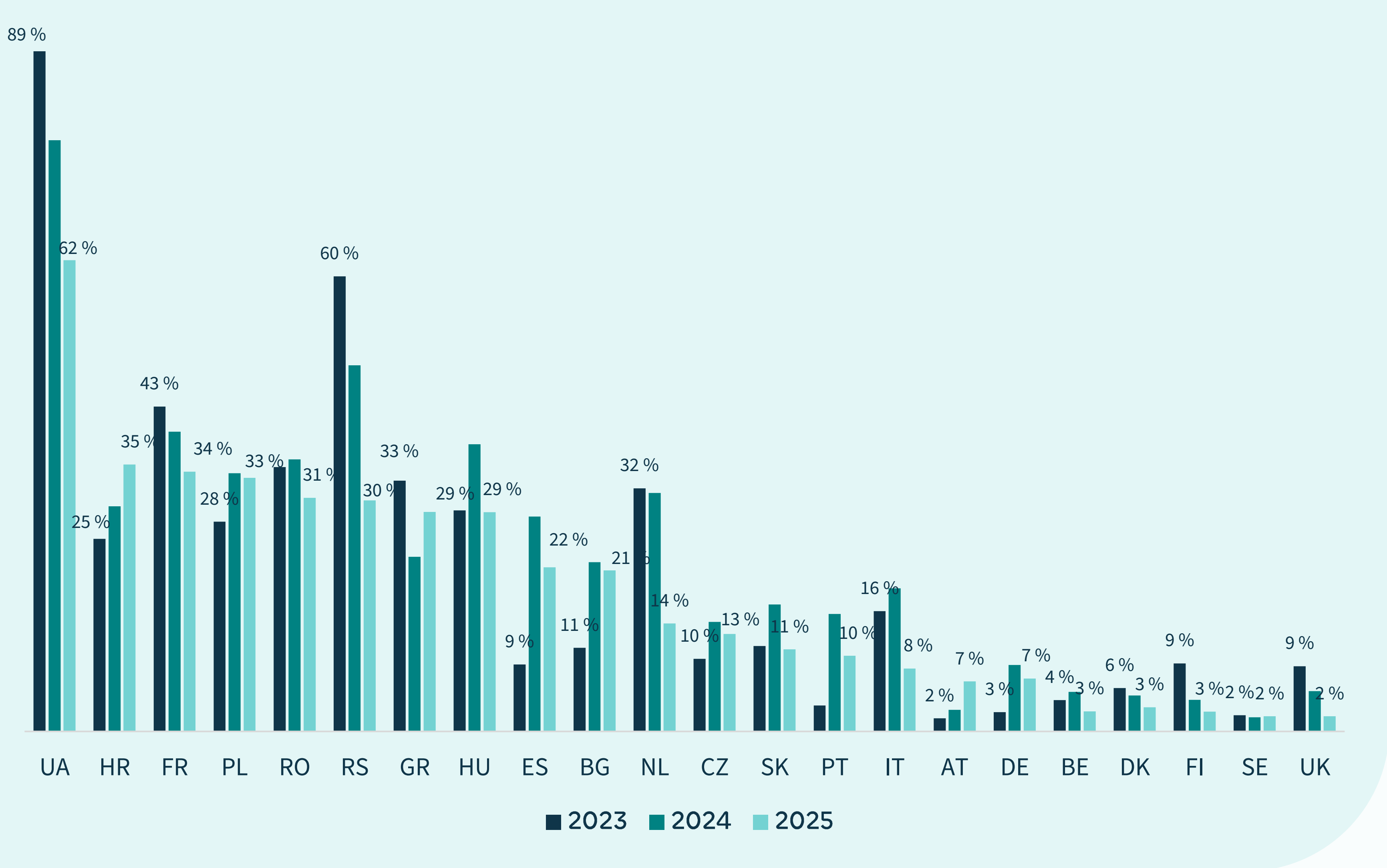
Diesel adoption continues to decline across Pharmaceutical fleets

Diesel's share of new Pharmaceutical fleet registrations has fallen across most European markets between 2023 and 2025, reflecting the sector's ongoing transition toward electrified mobility.

Some of the largest declines were recorded in Italy (51% to 20%), Austria (40% to 12%), Finland (19% to 0%) and Greece (23% to 2%).

While diesel remains a significant powertrain in markets such as Croatia (54%), Slovakia (49%), Spain (44%), Germany (42%) and the Czech Republic (39%), the overall trend points to a continued move away from diesel-powered vehicles.

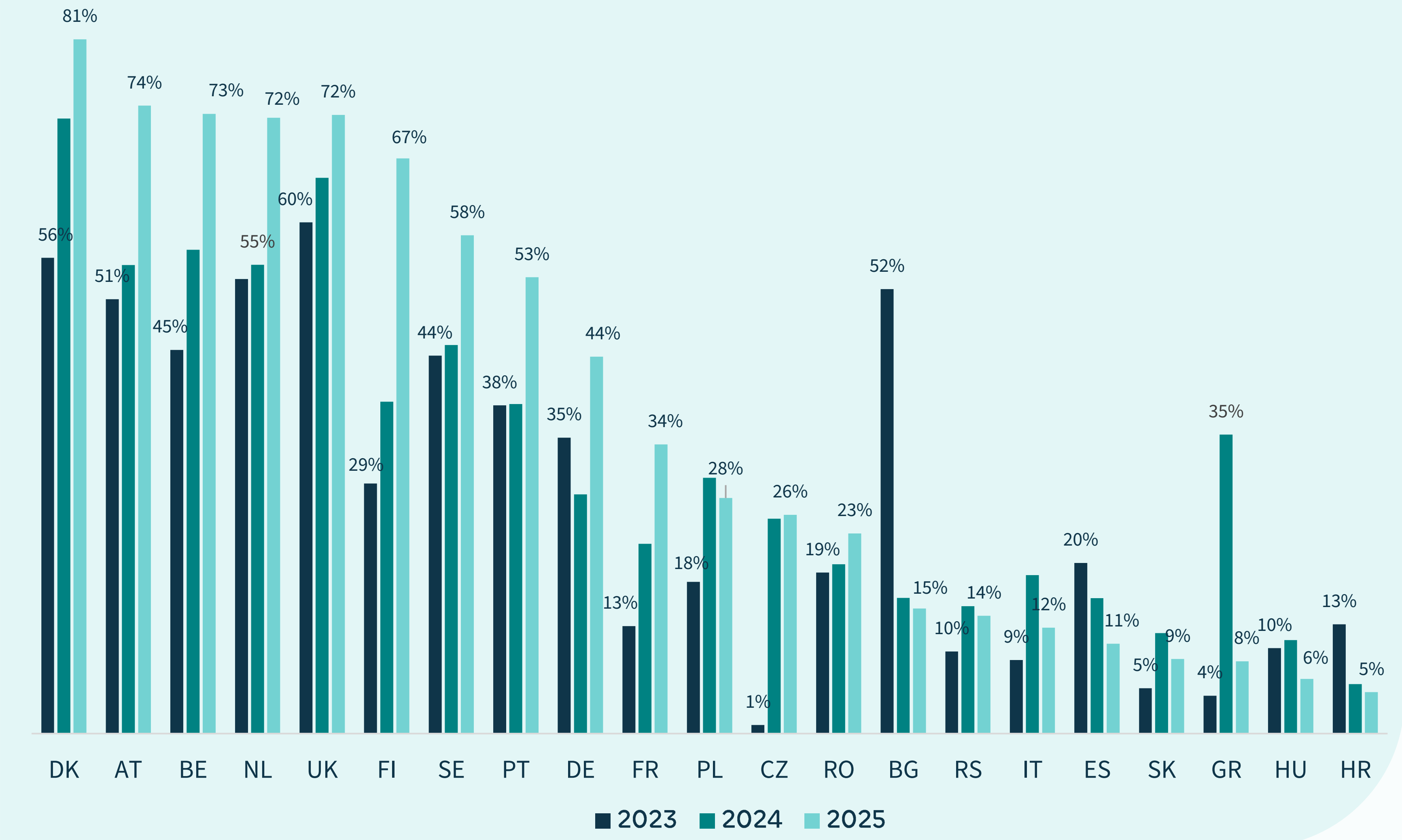
Petrol adoption remains concentrated in Eastern and Southern European Pharmaceutical markets



Petrol continues to represent a significant share of new Pharmaceutical fleet registrations in several markets, particularly Ukraine (62%), France (34%), Poland (33%), Romania (31%) and Greece (29%) in 2025.

While petrol adoption remains low in mature electrification markets such as Sweden, Finland, Denmark, Belgium and the UK, it continues to play an important role in a number of Eastern and Southern European markets, highlighting different stages of fleet electrification across the sector.

BEV adoption accelerates across Pharmaceutical fleets

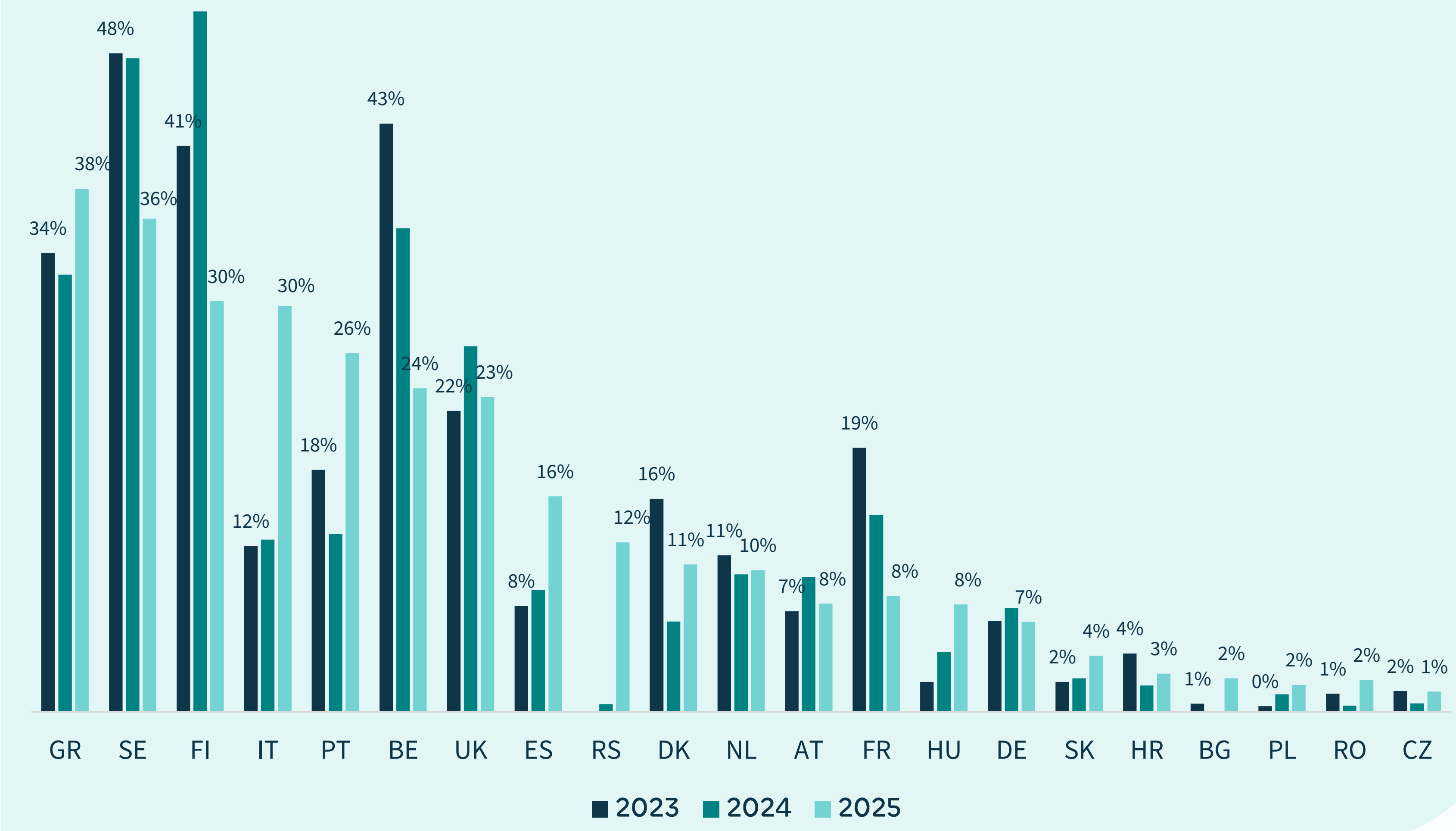


BEV adoption continues to gain momentum across Pharmaceutical fleets, with several markets reaching majority-electric new registrations by 2025.

Denmark (81%), Austria (74%), Belgium (73%), the Netherlands and the UK (both 72%) lead the transition, highlighting strong electrification progress across Northern and Western Europe.

While adoption levels vary significantly between countries, BEV registrations increased across most major markets between 2023 and 2025, reinforcing the sector's ongoing shift toward fully electric fleet mobility.

PHEV adoption remains an important transition pathway in Pharmaceutical fleets

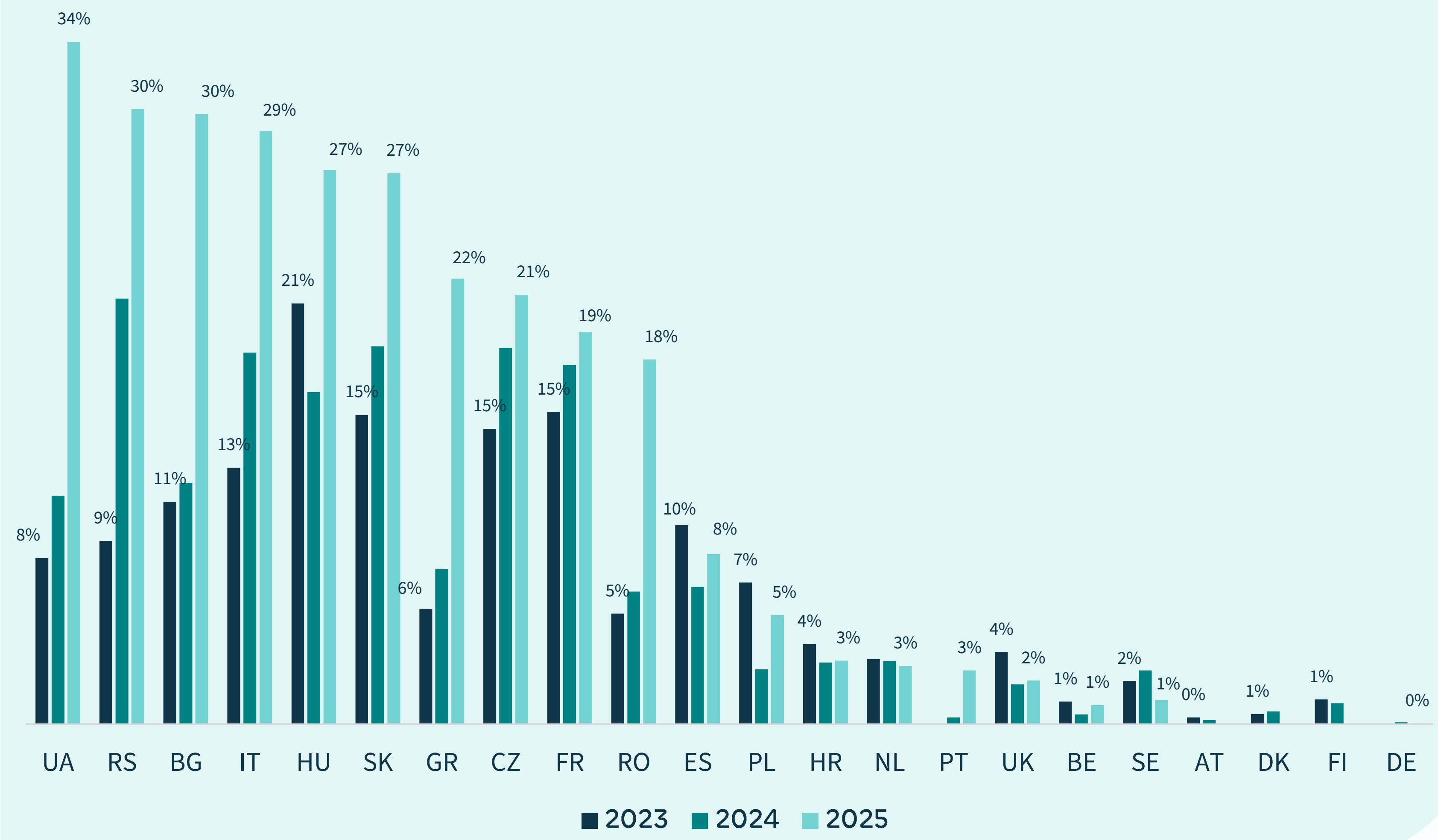


Plug-in hybrid vehicles continue to play a significant role in Pharmaceutical fleet electrification, although adoption levels vary considerably by market.

In 2025, PHEV shares were highest in Greece (38%), Sweden (36%), Finland (30%), Italy (30%) and Portugal (26%).

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

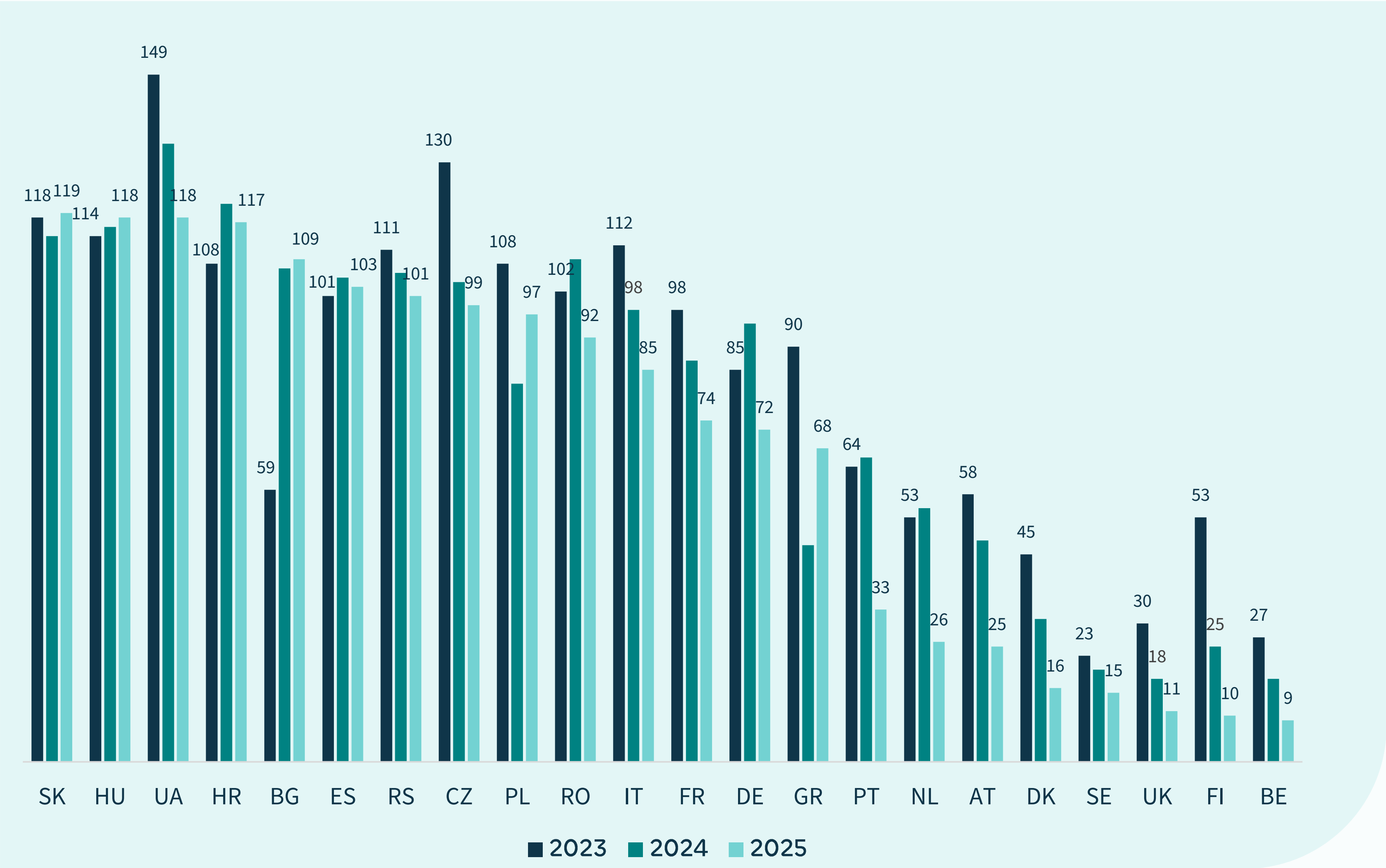
Hybrid adoption supports the transition toward lower-emission Pharmaceutical fleets



Hybrid vehicle adoption remains concentrated in a number of Pharmaceutical markets, particularly Ukraine (34%), Serbia (30%), Bulgaria (30%), Italy (29%) and Hungary (27%) in 2025.

While hybrid uptake varies considerably across Europe, the powertrain continues to play an important role in markets where fleets are gradually transitioning from conventional combustion engines toward electrified mobility.

CO_2 emissions continue to decline across Pharmaceutical fleets



Average CO_2 emissions from new Pharmaceutical fleet registrations declined across most European markets between 2023 and 2025, driven by increasing electrification.

Belgium (9 g/km), Finland (10 g/km) and the UK (11 g/km) recorded the lowest emissions in 2025, while Slovakia (119 g/km), Ukraine and Hungary (118 g/km each) remained the highest-emitting markets.

Overall, the results indicate continued progress toward lower-carbon fleet mobility across the Pharmaceutical 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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