

Technology industry benchmark

2026

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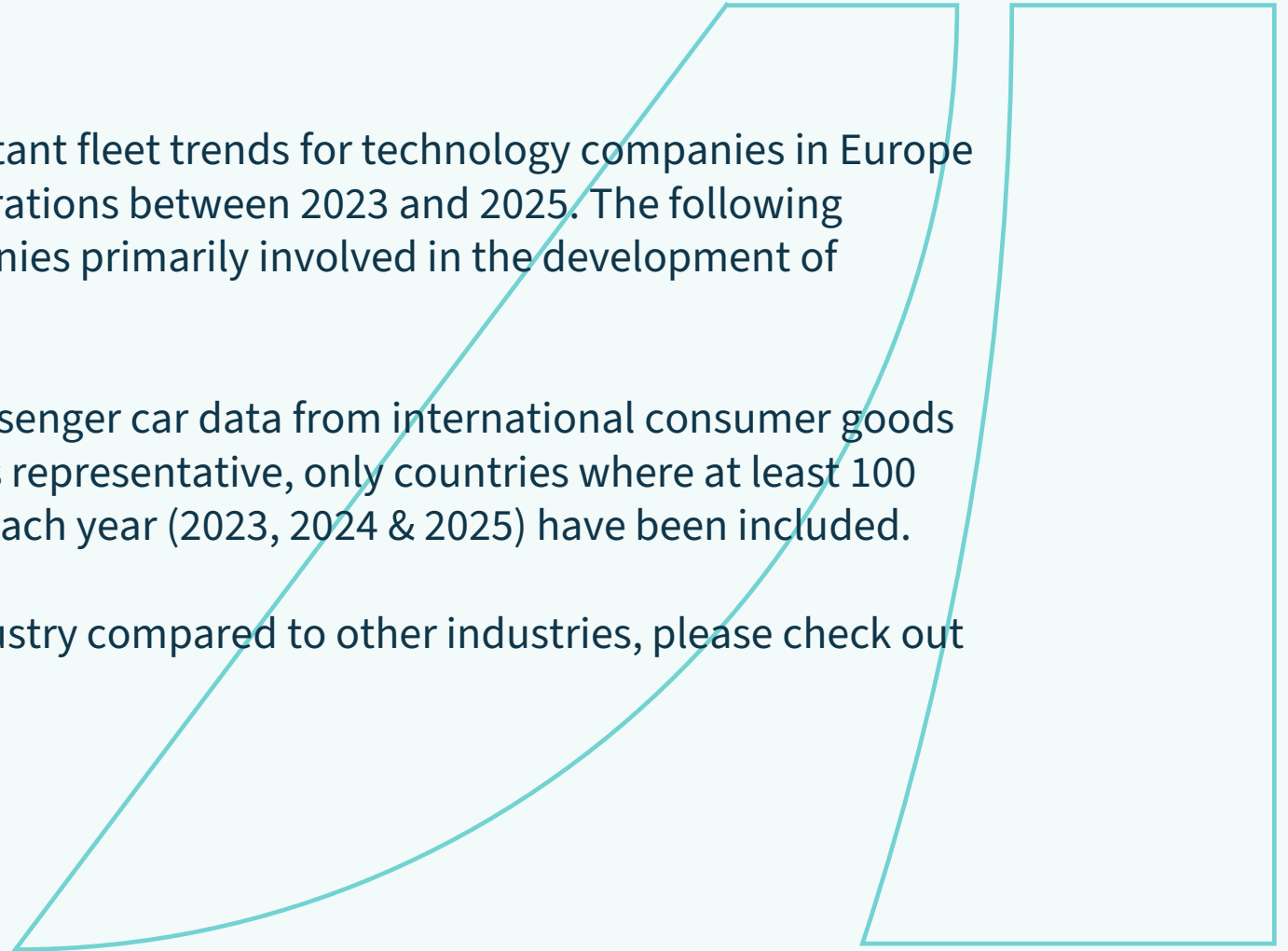


Introduction

In this industry benchmark report, the most important fleet trends for technology companies in Europe are highlighted by comparing passenger car registrations between 2023 and 2025. The following definition of the industry has been applied: companies primarily involved in the development of hardware or software 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:



Technology fleets are rapidly accelerating their transition toward electrification. BEV adoption increased from 25% of new registrations in 2023 to 43% in 2025, becoming the dominant powertrain, while diesel share declined from 21% to 13% over the same period.



Northern and Western European markets lead the industry's electrification journey. Belgium (87%), Austria (83%), the Netherlands (83%) and Finland (80%) recorded the highest BEV adoption levels in 2025, while Poland, Spain and Italy continued to show lower levels of battery-electric uptake.



Growing adoption of electric vehicles is driving lower fleet emissions. By 2025, Finland (5 g/km), Belgium (6 g/km), Sweden (16 g/km) and the Netherlands (18 g/km) recorded the lowest average CO₂ emissions, while Poland (136 g/km), Romania (97 g/km) and Spain (90 g/km) remained the highest-emitting markets.

Most popular segment

2023		2024		2025	
Segment	Share	Segment	Share	Segment	Share
SUV - D1	16%	SUV – C1	14%	SUV – C1	17%
SUV – C1	14%	SUV – D1	14%	SUV – D1	15%
D2	12%	SUV – C2	14%	SUV – C2	14%
C1	11%	C1	11%	SUV – D2	11%
SUV - C2	10%	D1	11%	D1	9%
D1	9%	SUV - D2	10%	D2	9%
SUV – D2	9%	D2	10%	C1	7%
C2	4%	E2	3%	E2	6%
B1	4%	C2	3%	E1	3%
SUV – B1	3%	B1	2%	SUV – E2	2%

Most popular car
segment: SUV – C1



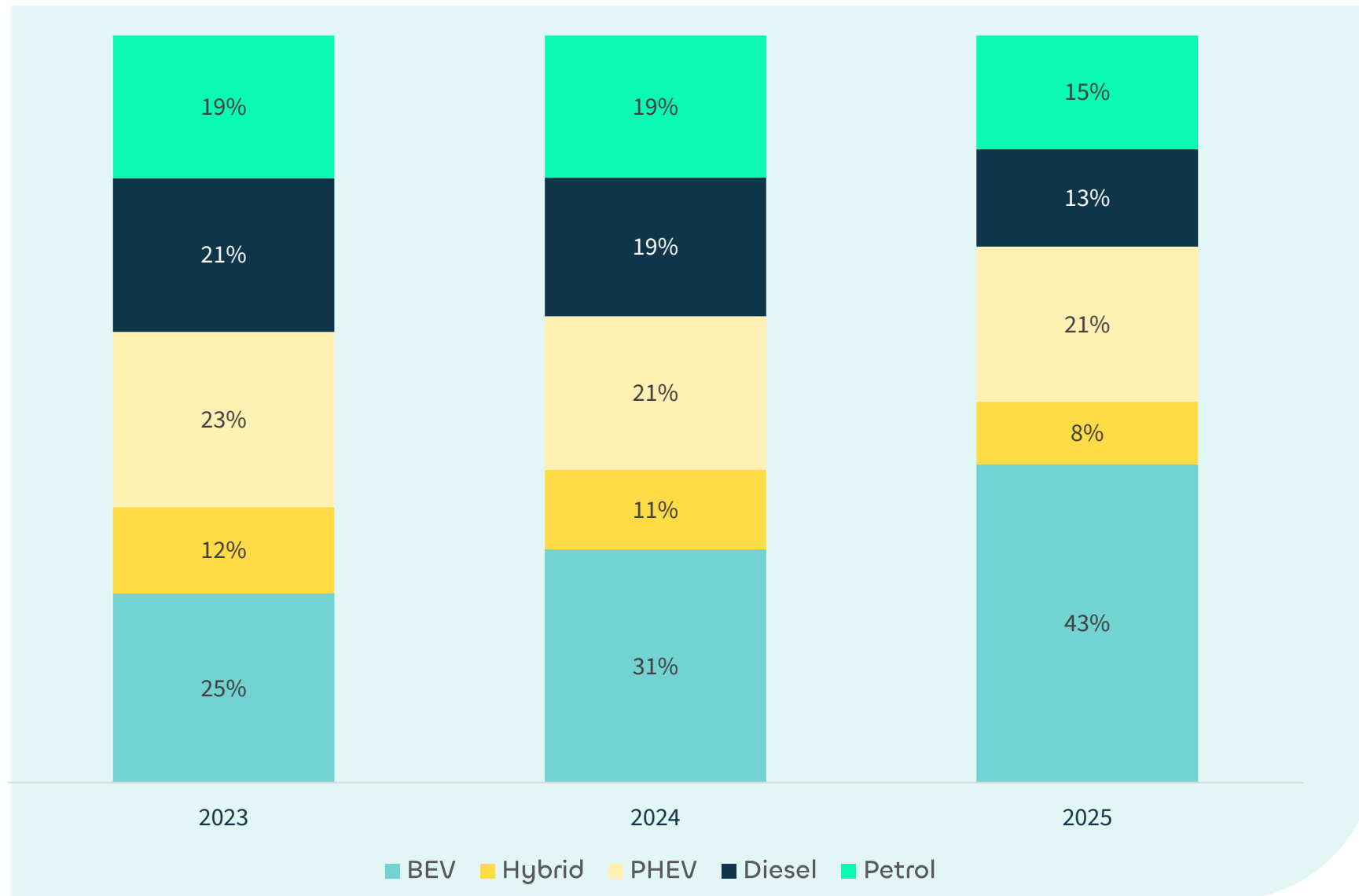
Most popular car

2023		2024		2025	
Model	Share	Model	Share	Model	Share
TESLA MODEL Y	6%	BMW X1	6%	BMW X1	5%
SKODA OCTAVIA	4%	SKODA OCTAVIA	5%	VOLKSWAGEN TIGUAN	4%
MERCEDES-BENZ C CLASS	3%	TESLA MODEL Y	5%	TESLA MODEL Y	3%
VOLKSWAGEN TIGUAN	3%	MERCEDES-BENZ GLC CLASS	3%	MERCEDES-BENZ GLC CLASS	3%
TOYOTA COROLLA	3%	PEUGEOT 308	3%	VOLKSWAGEN ID.7	3%
VOLVO XC40	3%	TESLA MODEL 3	3%	TOYOTA COROLLA	3%
TOYOTA YARIS	2%	VOLKSWAGEN GOLF	3%	SKODA ENYAQ	2%
VOLKSWAGEN GOLF	2%	TOYOTA COROLLA	3%	SKODA OCTAVIA	2%
BMW X1	2%	SKODA ENYAQ	2%	TESLA MODEL 3	2%
BMW X3	2%	VOLKSWAGEN TIGUAN	2%	BMW i4	2%

Most popular car:
BMW X1



Bevs strengthen their lead, reaching 43% of powertrain mix in 2025

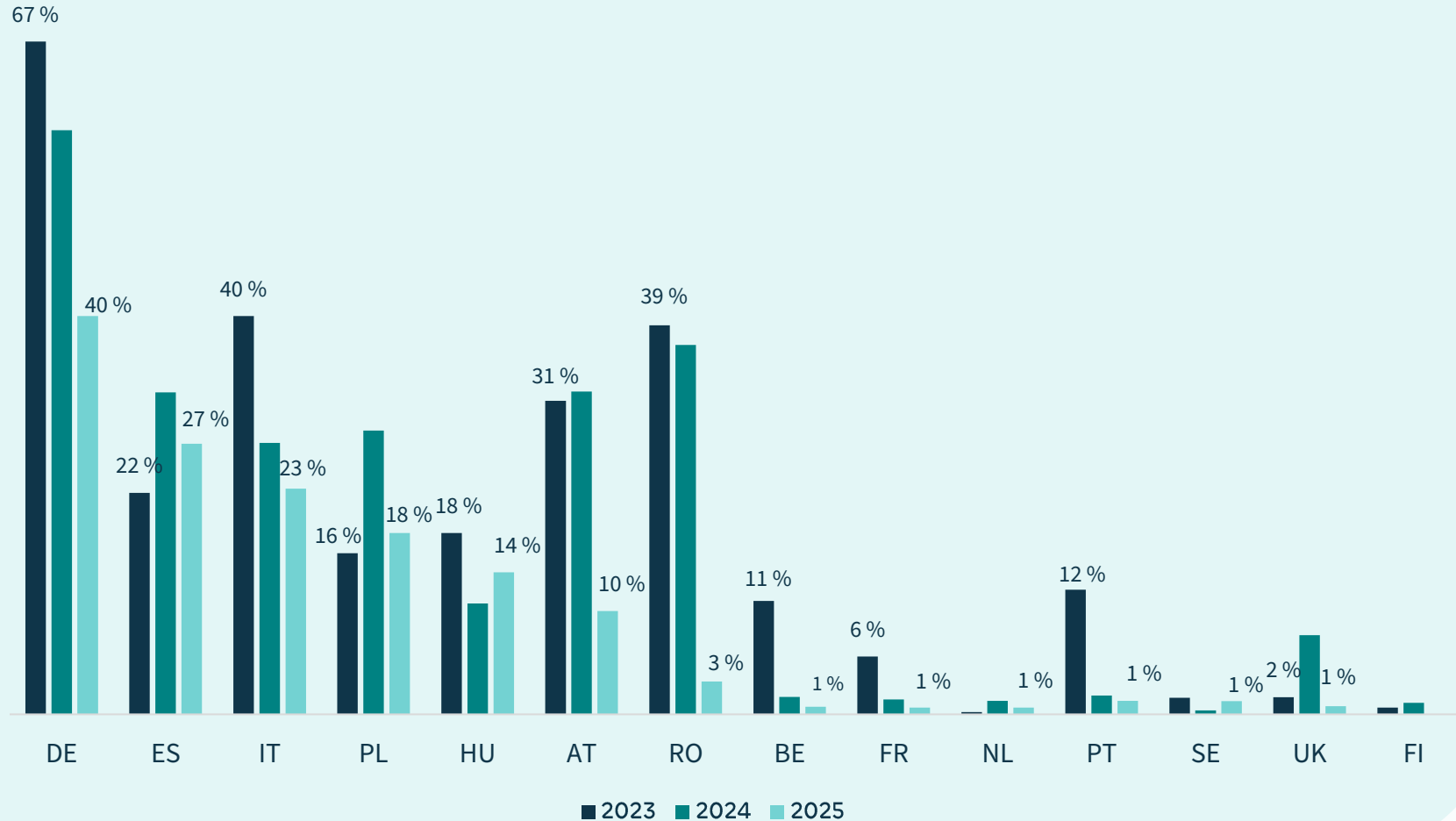


Battery electric vehicles (BEVs) continue to gain momentum, increasing from 25% in 2023 to 43% in 2025 and becoming the dominant powertrain choice.

Meanwhile, hybrid, diesel, and petrol shares decline, reflecting the industry's ongoing transition toward electrification.



Diesel adoption continues to decline across technology fleets

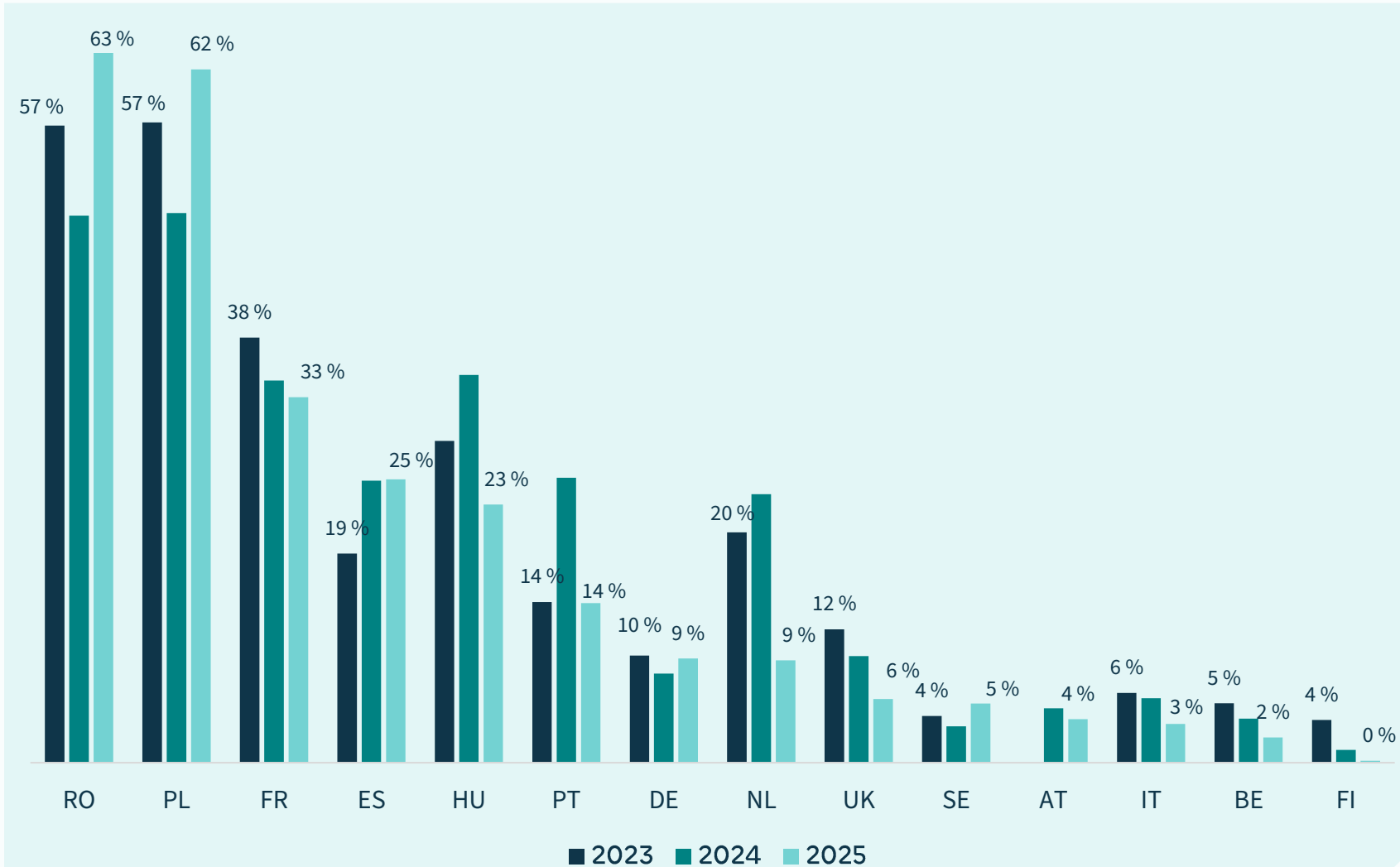


Diesel penetration fell significantly across most markets between 2023 and 2025, with the sharpest declines observed in Germany (67% to 40%), Austria (31% to 10%), and Italy (40% to 23%).

The trend reflects the industry's ongoing shift toward electrified powertrains and lower-emission mobility solutions.



Petrol remains dominant in Romania and Poland while losing ground elsewhere

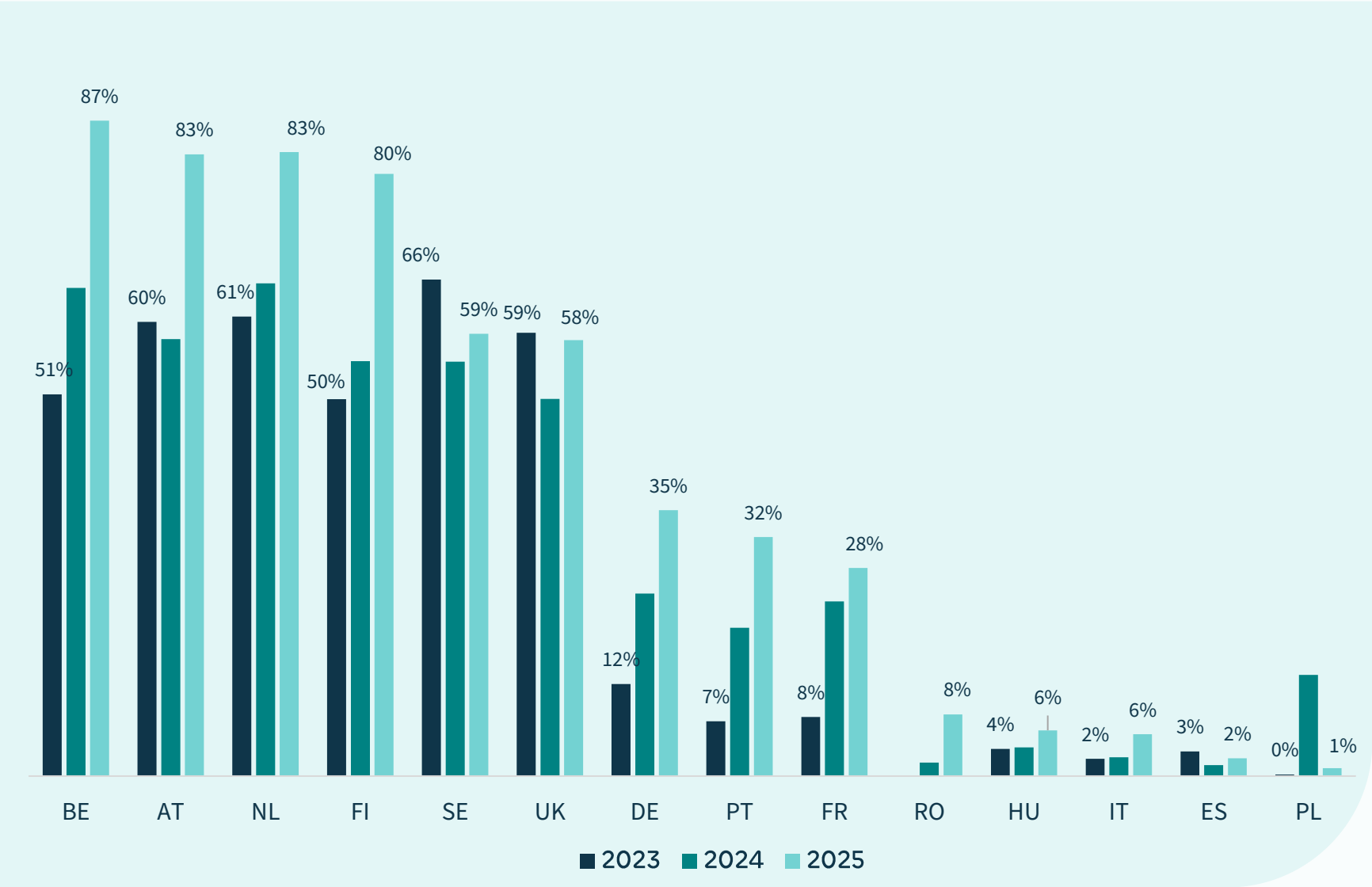


Petrol adoption continues to vary significantly across technology fleets, with Romania (63%) and Poland (62%) recording the highest shares in 2025.

While several markets saw declining petrol penetration, particularly the Netherlands, the UK and Belgium, petrol remains a prominent powertrain choice in selected countries despite the ongoing shift toward electrification.



BEV adoption accelerates across technology fleets, led by Belgium and Northern Europe



BEV adoption increased across most technology-industry markets between 2023 and 2025, with Belgium (87%), Austria (83%), the Netherlands (83%) and Finland (80%) achieving the highest penetration levels.

Strong growth in Germany, Portugal and France further highlights the sector's continued transition toward fully electric fleets, while adoption remains relatively limited in Southern and Eastern European markets.



PHEV adoption remains strong in selected markets as electrification pathways diverge

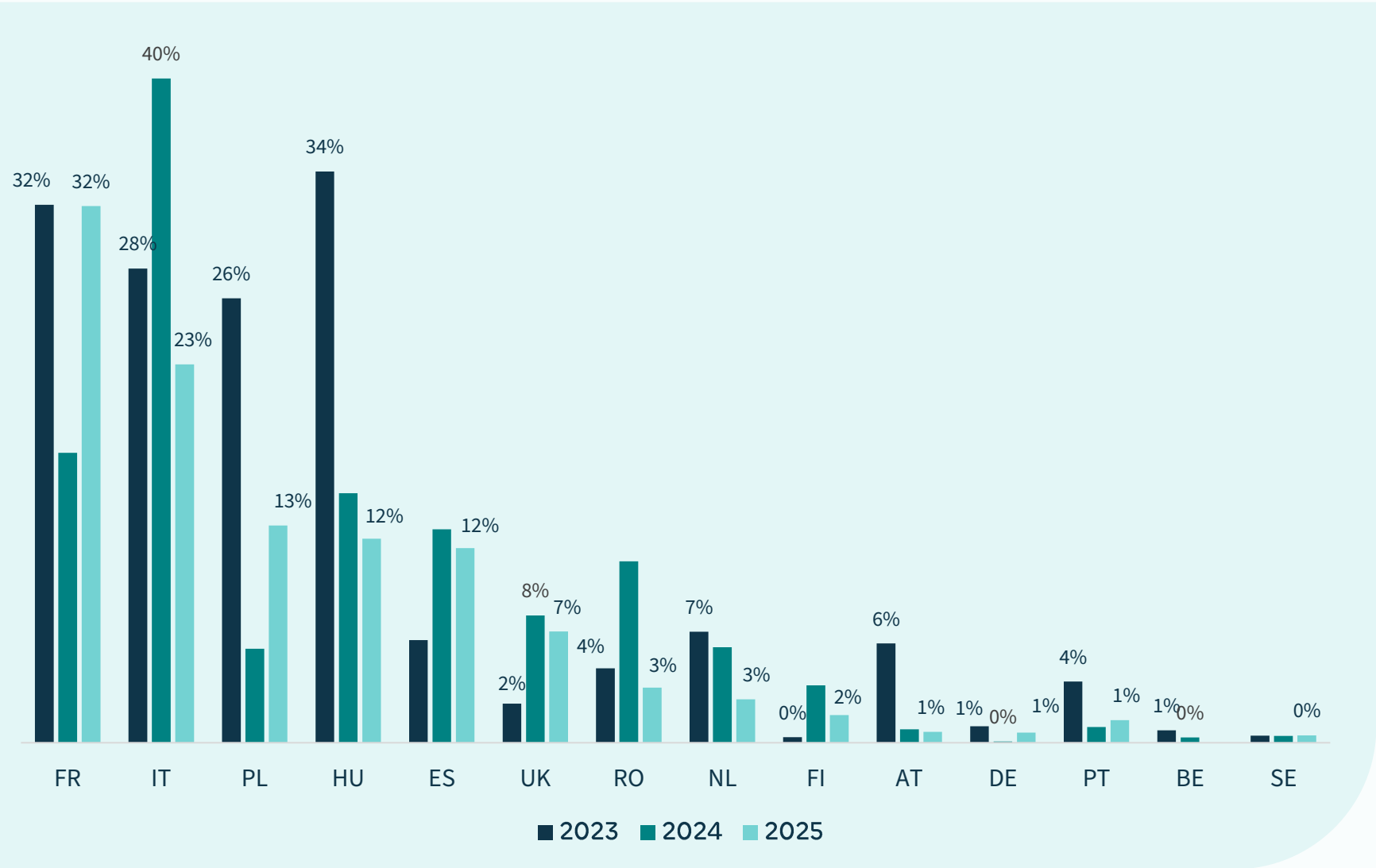


PHEV adoption continues to vary significantly across technology-industry markets, with Portugal (51%), Italy (46%) and Hungary (45%) recording the highest shares in 2025.

While some countries, such as Portugal and Belgium, saw declining PHEV penetration, growth in markets including Italy, Hungary and Romania highlights the continued role of plug-in hybrids as a transitional technology in fleet electrification strategies.



Hybrid adoption is becoming increasingly concentrated in a handful of markets

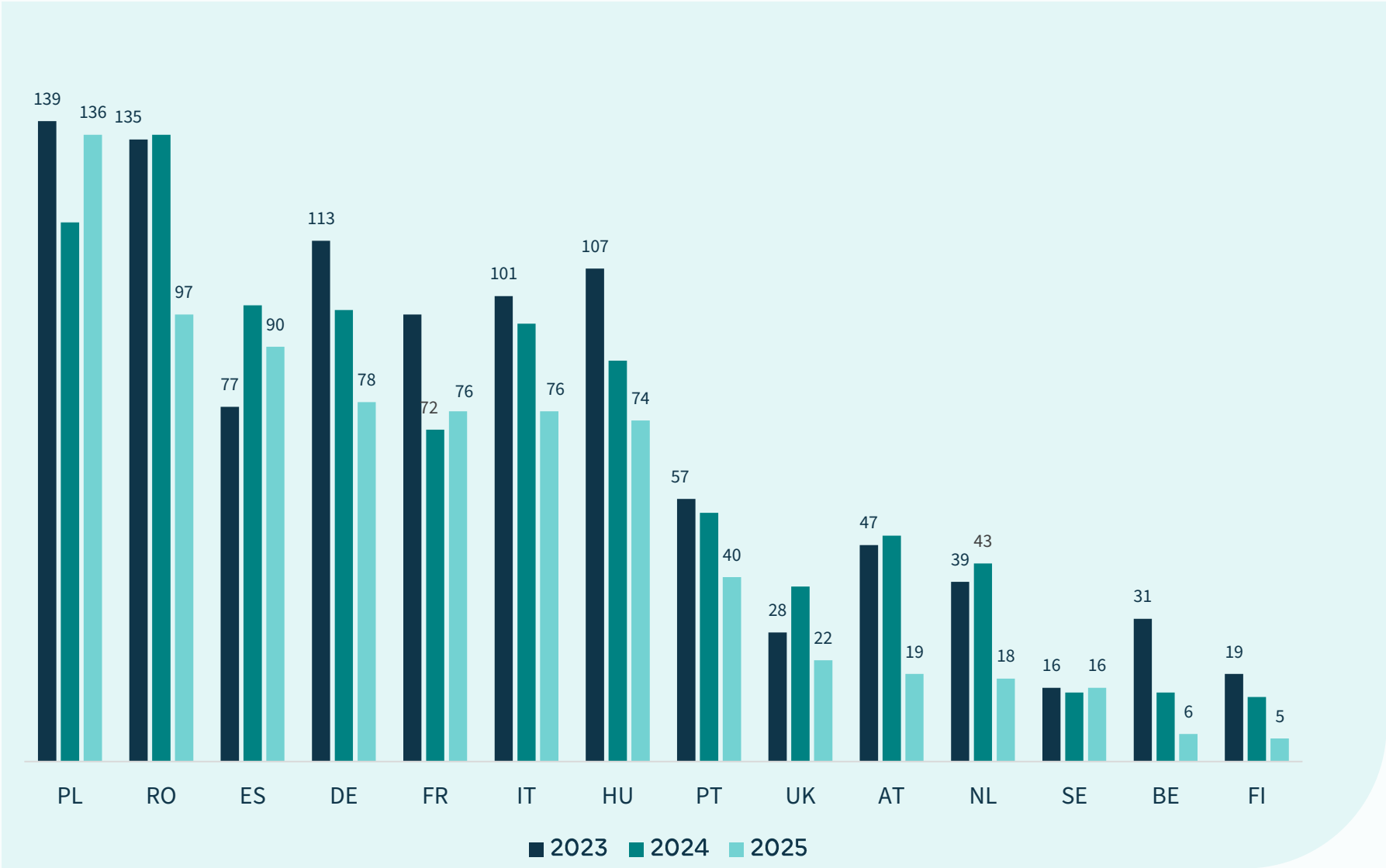


Hybrid adoption within the technology industry remains highest in France (32%), Italy (23%) and Poland (13%) in 2025.

While hybrid penetration has declined in several countries since 2023, selected markets continue to leverage hybrid powertrains as part of their transition to lower-emission mobility solutions, although their overall role remains limited compared to BEVs and PHEVs.



CO₂ emissions continue to decline as technology fleets electrify



Average fleet CO₂ emissions decreased across most technology-industry markets between 2023 and 2025, reflecting the growing adoption of BEVs and other low-emission powertrains.

The largest reductions were observed in Belgium (31 to 6 g/km), Austria (47 to 19 g/km), the Netherlands (39 to 18 g/km), and Portugal (57 to 40 g/km), while Romania and Poland continue to report the highest emission levels despite ongoing improvements.



Vehicle segments

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

Volume cars (1)

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.

