

# Construction industry benchmark

2025



Better with every move.

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# Introduction

In this construction industry benchmark report, the most important fleet trends for construction industry fleets in Europe are highlighted, by comparing the passenger car registrations between 2022 and 2024.

The following definition of the construction industry has been applied:

*Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure development supply chain.*

This analysis of fleet trends is based on Ayvens' passenger car data from 34 international companies. For the scope and to make sure the data is representative, we've only included countries where at least 100 passenger cars were renewed within the industry each year (2022, 2023 & 2024).

If you would like to know how sustainable this industry compared to other industries, please check out our Sustainable Industry Fleet Ranking 2025.



# Key findings:



While overall, the share of diesel cars in construction industry fleets has decreased some countries like Italy & Germany still have diesel cars representing 70%+ of new vehicles ordered.



Battery electric vehicles have seen the largest growth compared to other powertrains representing 15% of new car orders in 2022 to 39% in 2024



CO<sub>2</sub> emissions have, on average decreased by 14% since 2022, less than the overall average across all industries of a 25% reduction since 2022.

# The SUV compact segment is the most popular car segment in international construction fleets

	2022	2023	2024
1 <sup>st</sup>	C1	C1	SUV-C1
2 <sup>nd</sup>	SUV-B1	SUV-B1	C1
3 <sup>rd</sup>	SUV-D1	SUV-C1	SUV-B1
4 <sup>th</sup>	SUV-C1	SUV-D1	SUV-D1
5 <sup>th</sup>	B1	B1	SUV-C2
6 <sup>th</sup>	D1	SUV-D2	B1
7 <sup>th</sup>	D2	SUV-C2	D2
8 <sup>th</sup>	MPV-D1	D2	SUV-D2
9 <sup>th</sup>	SUV-C2	D1	D1

Most popular car  
segment: SUV-C1



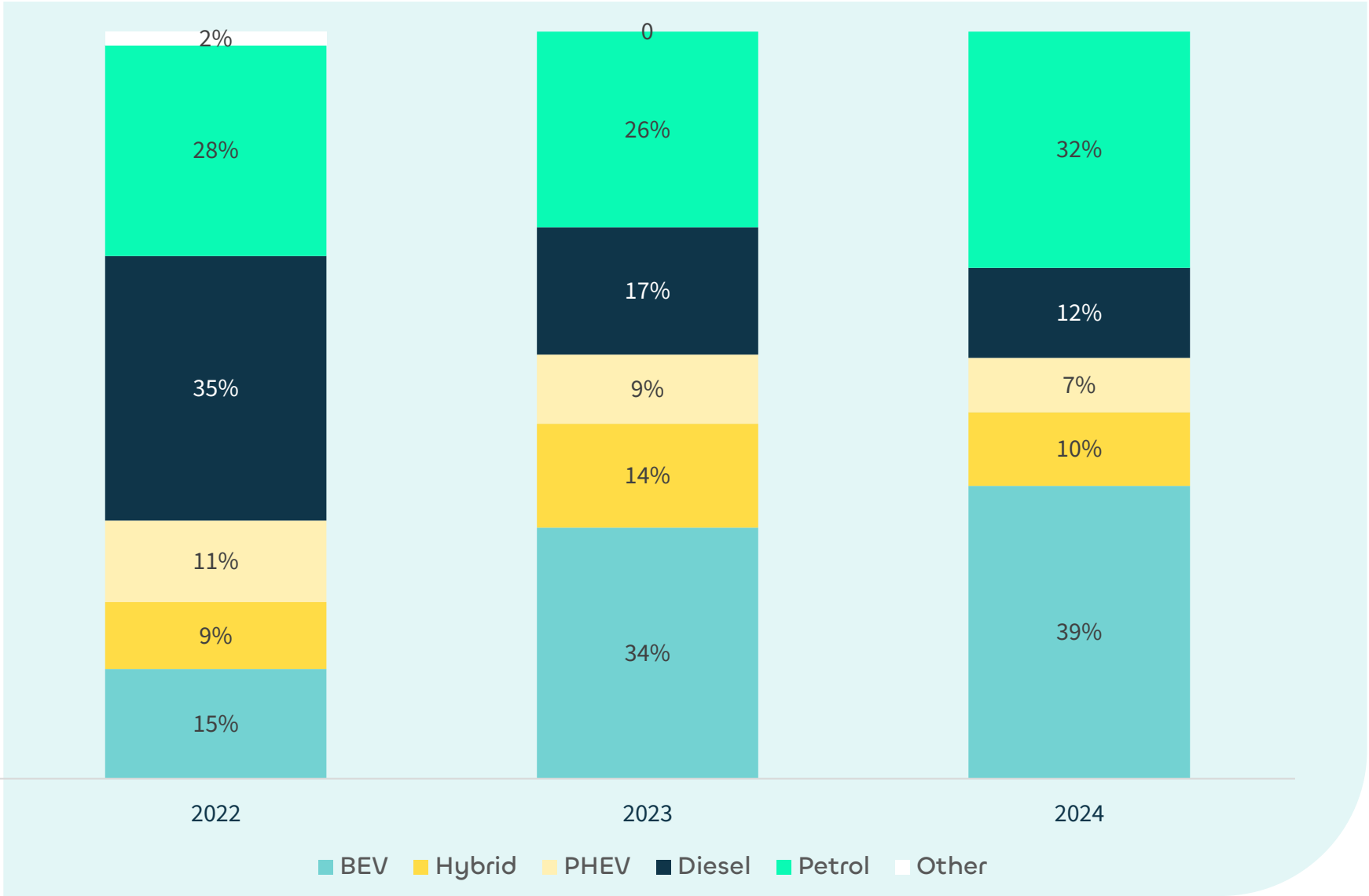
# The most popular car in 2024 in international construction fleets was the Peugeot 2008

	2022	2023	2024
1 <sup>st</sup>	Peugeot 2008	Renault Megane e-Tech	Peugeot 2008
2 <sup>nd</sup>	Citroen C5 aircross	Peugeot 2008	Peugeot 308
3 <sup>rd</sup>	Peugeot 308	Peugeot 308	Renault Austral
4 <sup>th</sup>	Peugeot 3008	Renault Captur	Renault Megane e-Tech
5 <sup>th</sup>	Renault Captur	Renault Arkana	Peugeot 208
6 <sup>th</sup>	Peugeot 208	Peugeot 208	Kia Niro
7 <sup>th</sup>	Renault Arkana	Citroenc C Aircross	Volvo XC40
8 <sup>th</sup>	Renault Clio	Citroen C3	Renault Arkana
9 <sup>th</sup>	Peugeot 5008	Peugeot 3008	Renault Captur

Most popular car:  
Peugeot 2008



# The share of new diesel vehicles in construction industry fleets have more than halved since 2022.



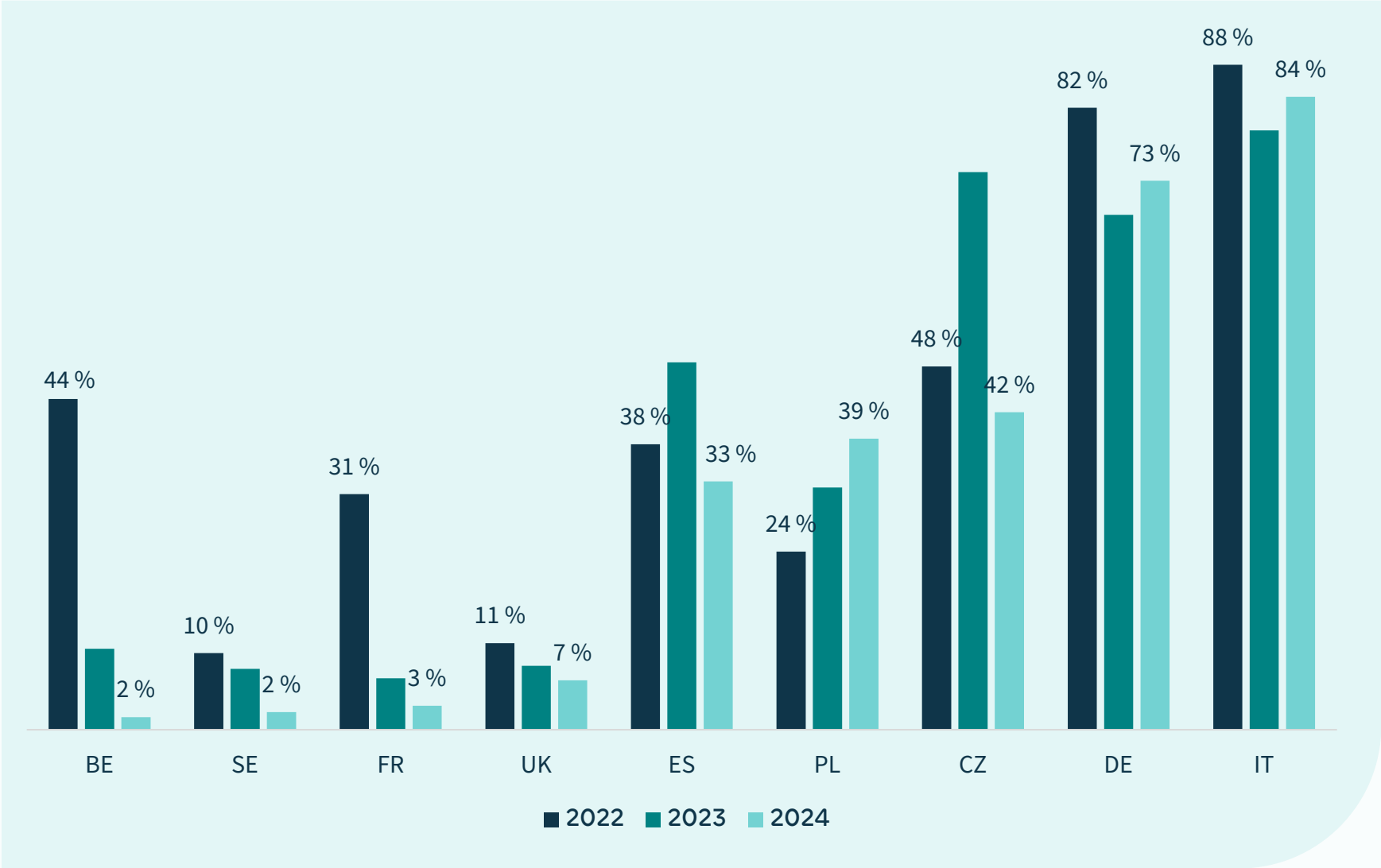
The share of petrol vehicles has increased to 32% in 2024.

Plug-in hybrids have slightly decreased in construction industry fleets while hybrid is stable.

Battery electric vehicles have seen the largest growth compared to other powertrains.



# Construction industry fleets in Belgium have seen the largest decrease in share of new diesel cars



Construction fleets in Germany, Poland and Italy have seen an increase in the share of diesel vehicles compared to 2023.

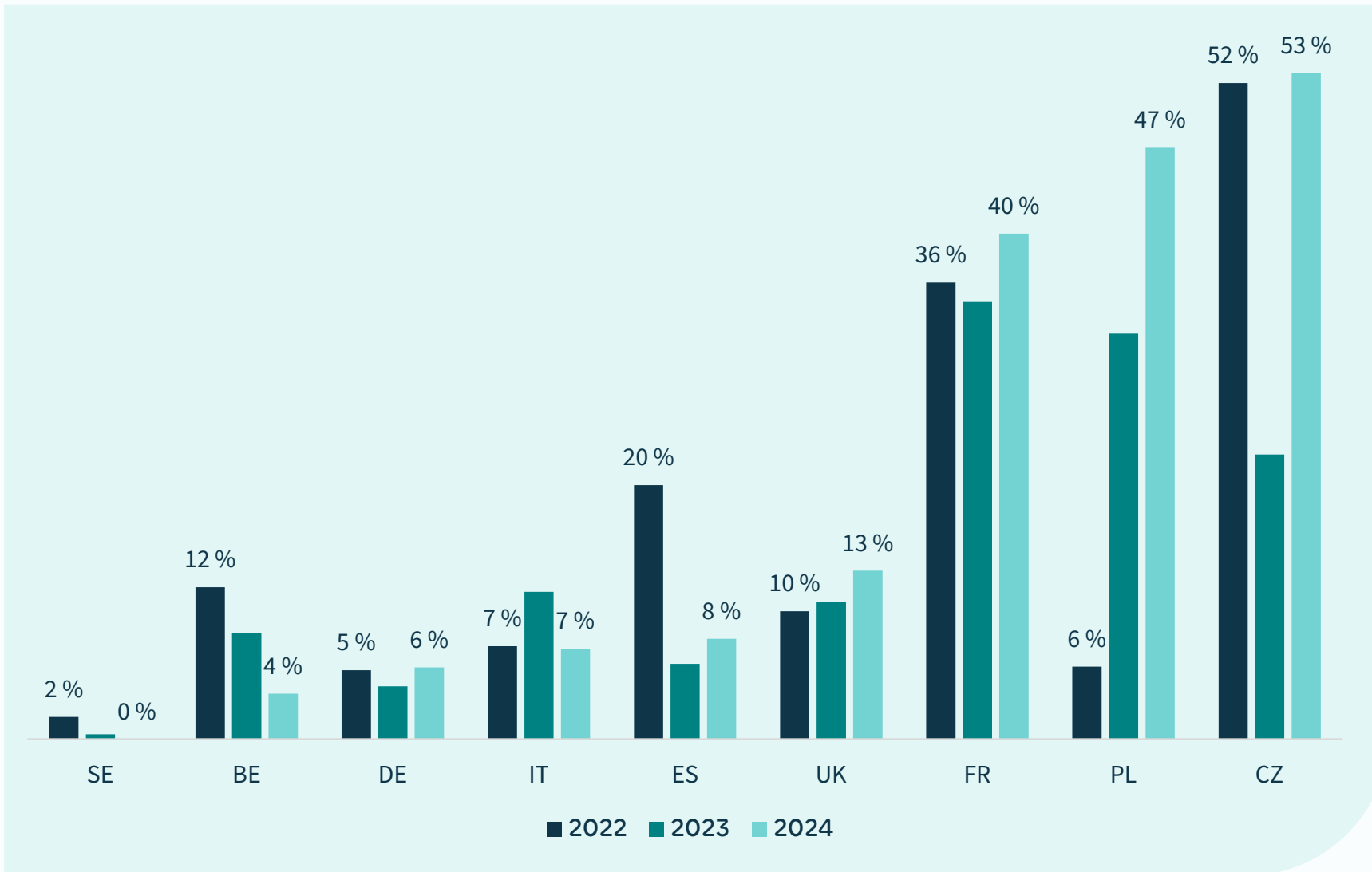
Belgian and French construction industry fleets have seen the largest decrease in the share of new diesel cars.

In 2024 84% of new vehicles in international construction industry fleets in Italy were diesel cars.





# In most countries, the share of new petrol vehicles is lower than diesel, however it is increasing.

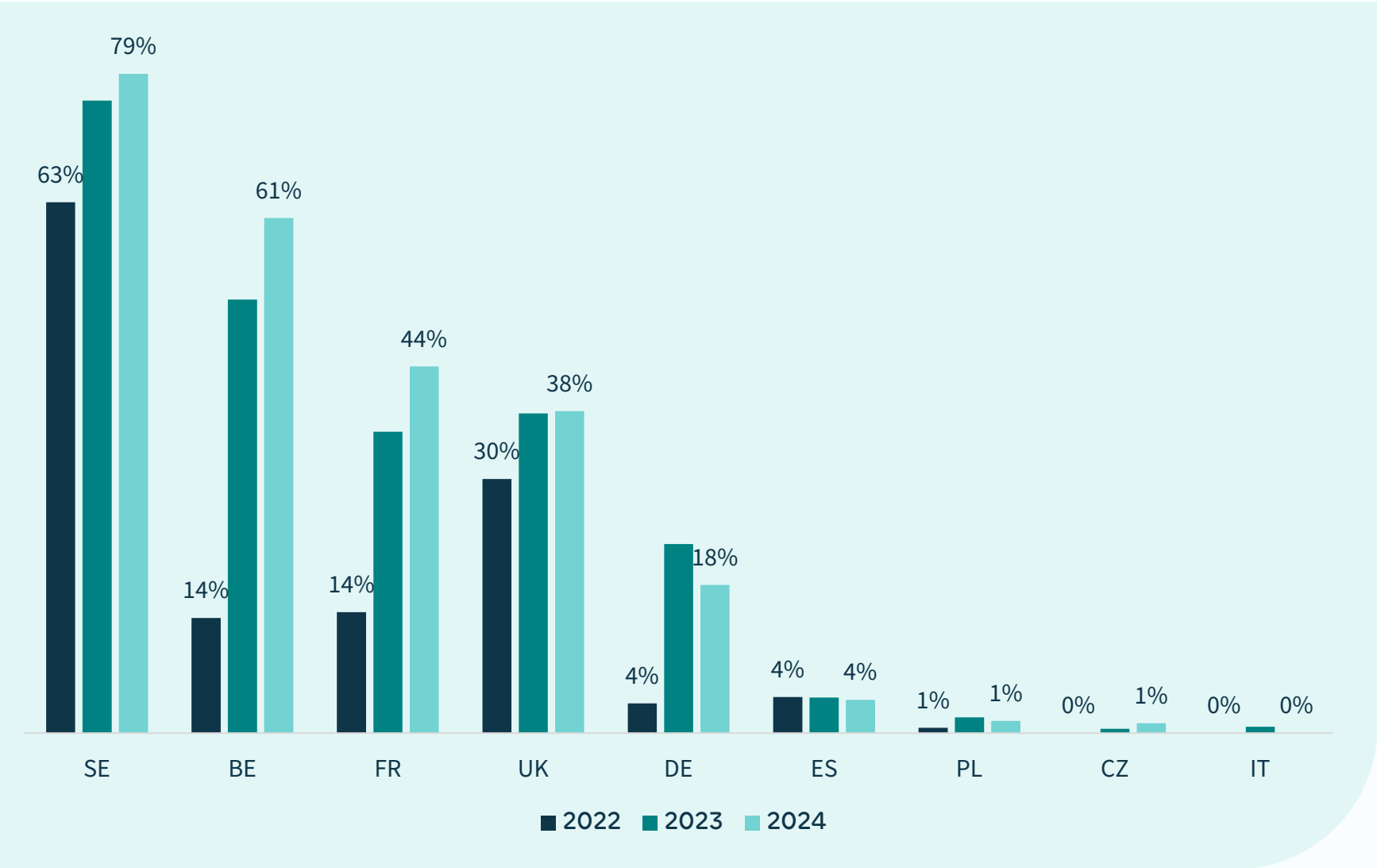


Construction industry fleets in Poland have seen huge increases in the share of new petrol vehicles in fleet, going from 6% in 2022 to 47% in 2024.

Only construction fleets in Sweden, Belgium and Spain have a lower share of new petrol vehicles in fleet in 2024 compared to 2022.



# 3 out of 4 new cars delivered in international construction industry fleets in Sweden are battery electric vehicles



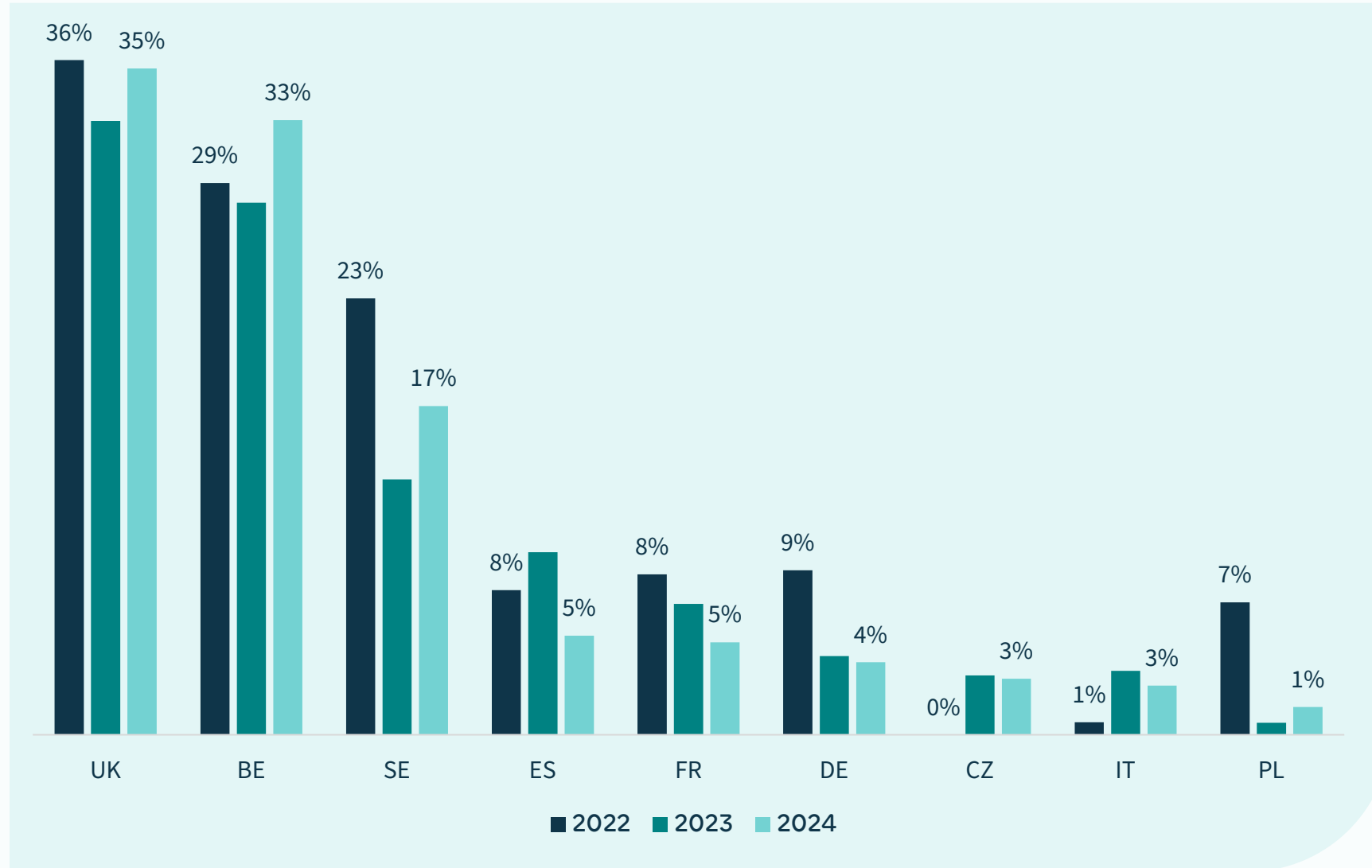
Battery electric vehicle adoption remains very low or non-existent in construction industry fleets in Spain, Poland, Czech Republic and Italy.

Over 50% of new vehicles in Belgium and Sweden were BEVs in 2024.

Most countries saw only modest increases in BEVs in 2024 compared to 2023.



# Plug-in hybrids have remained stable or slightly decreased since 2022, except in Belgium

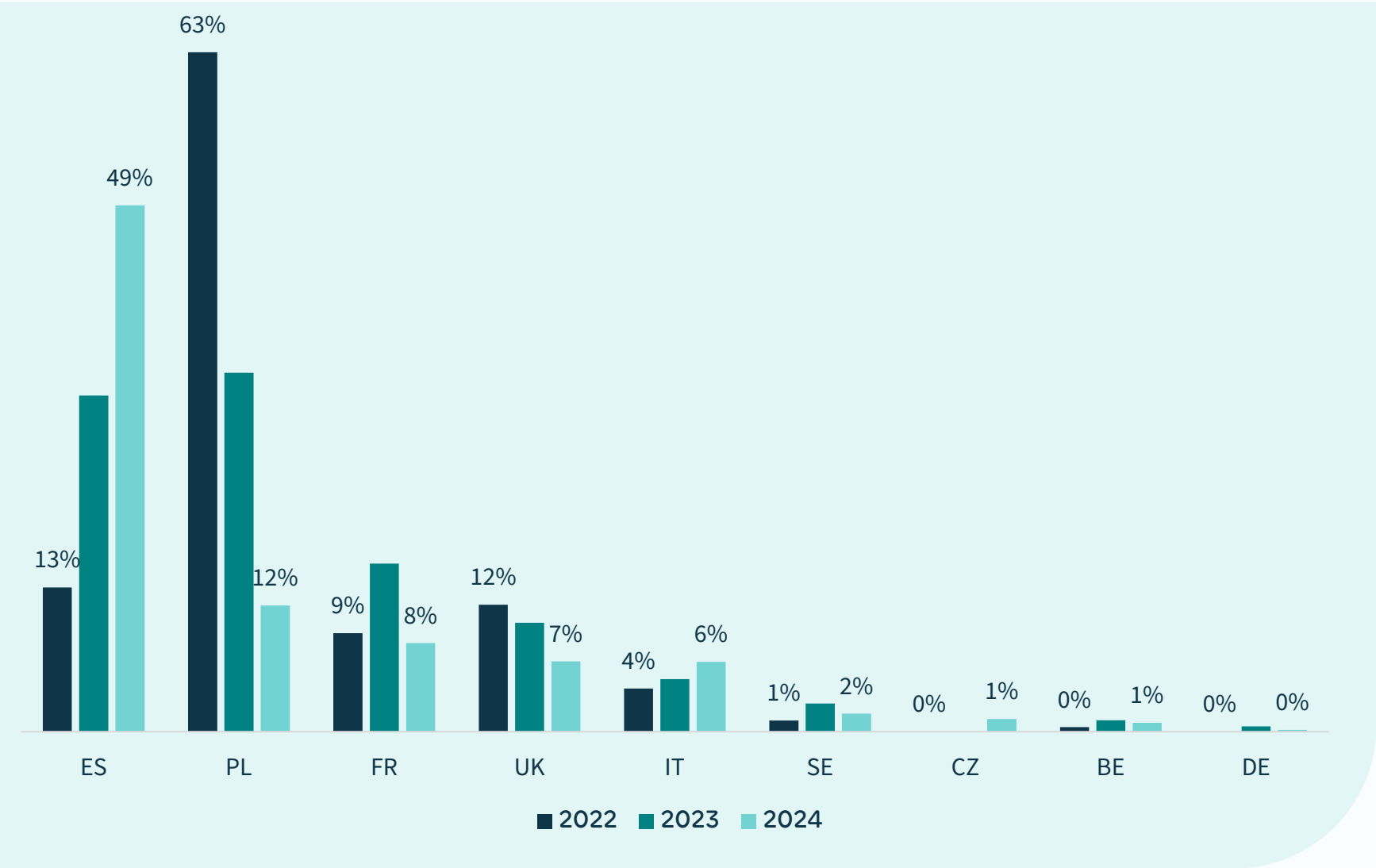


International construction industry fleets in the UK have the highest share of plug-in hybrids (PHEVs) in fleet.

The share of PHEVs has decreased the most in Poland, Sweden and Germany since 2022.



# The construction industry in Spain is leading the way with the uptake of hybrid vehicles



The share of hybrid vehicles is low in most countries with only international construction industry fleets in Poland and Spain having a fleet share of over 10%.

Construction fleets in Sweden, Czech Republic, Belgium and Germany have almost no hybrids in fleet.



# Average emissions\* in international construction industry fleets have decreased by 14% since 2022.



In 2024, average CO<sub>2</sub> emissions for new cars ordered in international construction fleets were 90 g/km.

CO<sub>2</sub> emissions have, on average decreased by 14% since 2022, less than the overall average across all industries of a 25% reduction since 2022.

Emissions have increased in construction industry fleets in Italy since 2022.

CO<sub>2</sub> emissions on new cars in construction fleets in Sweden (10 g/km) are 92% lower than new cars in construction fleets in Italy (132 g/km).

\*OEM estimated emissions



# Vehicle segments

## Volume cars (1)

Subcompact cars (B)



B1- VW Polo



SUV-B1 – VW T-Cross

Not common

Compact cars (C)



C1 – VW Golf



SUV-C1 – VW T-Roc



MPV-C – VW Touran

Midsized cars (D)



D1 – VW Passat



SUV-D1 – VW Tiguan



MPV-D – VW Sharan

Full-size cars (E)

## Premium cars (2)



B2 – Mini Cooper



C2 – BMW 1 series



SUV-C2 – BMW X1



D2 – BMW 3 series



SUV-D2 – BMW X3

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

<b>Automotive:</b>	Companies operating in the vehicle-development supply chain including OEMs and aftermarket companies (no rental companies)
<b>Construction:</b>	Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure development supply chain.
<b>Consumer Goods:</b>	Companies developing or selling consumer products (FMCGs, retailers, etc).
<b>Energy &amp; Chemicals:</b>	Companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals.
<b>Financial &amp; Professional Services:</b>	Companies offering financial products (banks, insurers, etc) or professional services (accountancy and consultancy).
<b>Healthcare:</b>	Companies that provide services for diagnosing, preventing, treating and curing health conditions.
<b>Industrial:</b>	Companies producing or maintaining physical material or products for the B2B sector.
<b>Pharmaceutical:</b>	Companies involved in developing, producing and distributing pharmaceutical products.
<b>Technology:</b>	Companies primarily involved in the development of hardware or software products.
<b>Transport:</b>	Industry that provides services to transport people or goods.



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