

Consumer Goods industry benchmark

2025



Better with every move.

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Introduction

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

The following definition of the consumer goods industry has been applied:
Companies developing or selling consumer products (FMCGs, retailers, etc).

This analysis of fleet trends is based on Ayvens' passenger car data from 48 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:



Consumer goods fleets are cutting back on diesel vehicles and replacing many with more sustainable options such as hybrids and plug-in hybrids. But with a low share of battery electric vehicles (BEVs) and still relatively high emissions, the consumer goods industry ranks last on average CO₂ emissions compared to other industries.



Belgium has the most sustainable fleets, with very low diesel and petrol shares and a high level of BEVs. Germany still has one of the highest diesel shares among all industries. Spain stands out for the wrong reasons: the diesel share almost doubled from 2022 to 2024.

Most popular segment

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

Most popular car
segment: C1



Most popular car

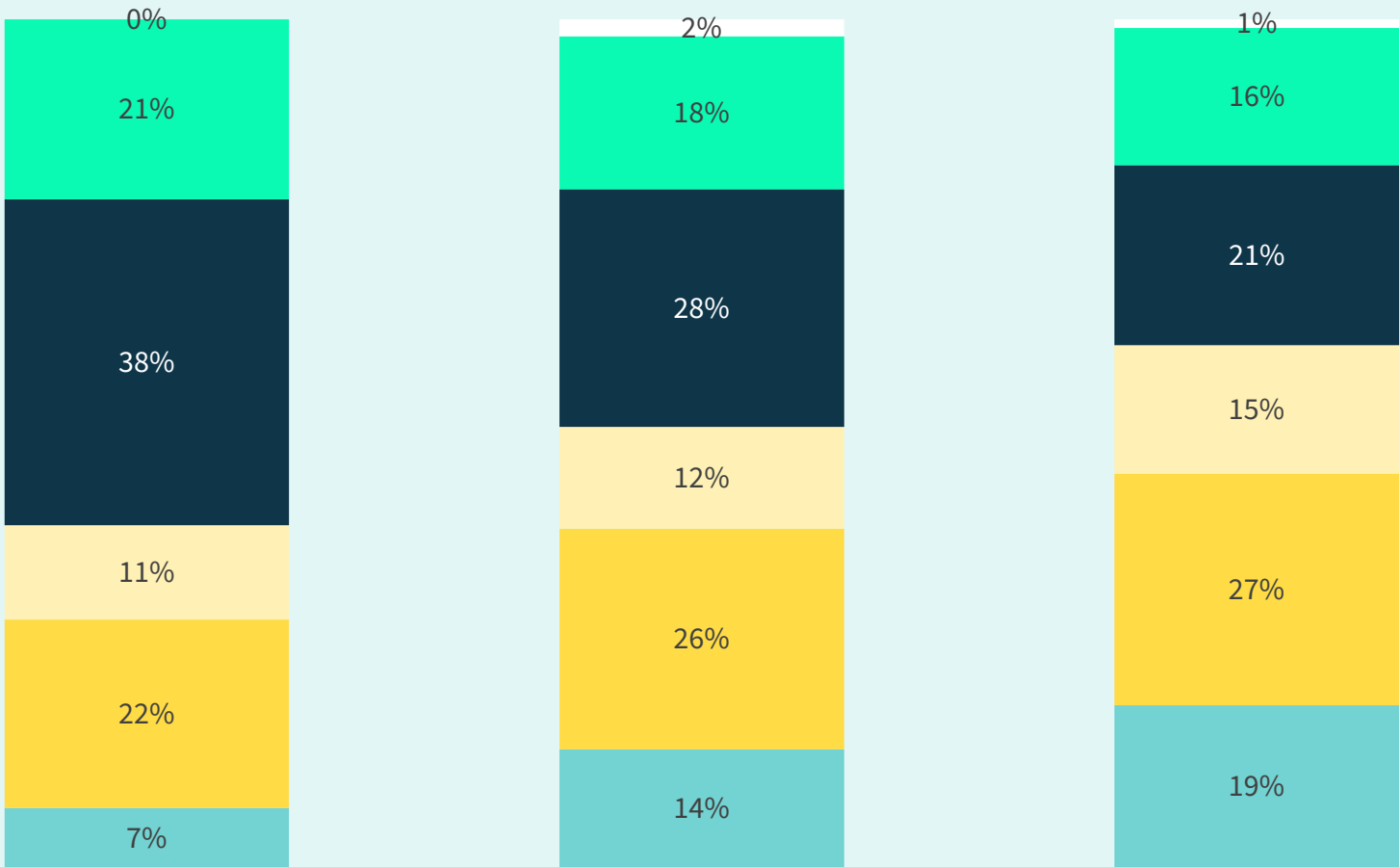
	2022	2023	2024
1 st	Toyota Corolla	Toyota Corolla	Toyota Corolla
2 nd	Renault Clio	Ford Focus	Volkswagen Golf
3 rd	Ford Focus	Renault Megane	Skoda Octavia
4 th	Volkswagen Passat	Renault Arkana	Skoda Enyaq
5 th	Skoda Octavia	Skoda Octavia	Volkswagen Tiguan
6 th	Peugeot 3008	Toyota RAV4	Kia Niro
7 th	Toyota Yaris	Ford Kuga	Toyota Yaris Cross
8 th	BMW3 Series	Volkswagen Golf	BMW X1
9 th	BMW5 Series	Peugeot 3008	Nissan Qashqai

Most popular car:
Toyota Corolla



Diesel and petrol are decreasing overall

Trends in powertrains



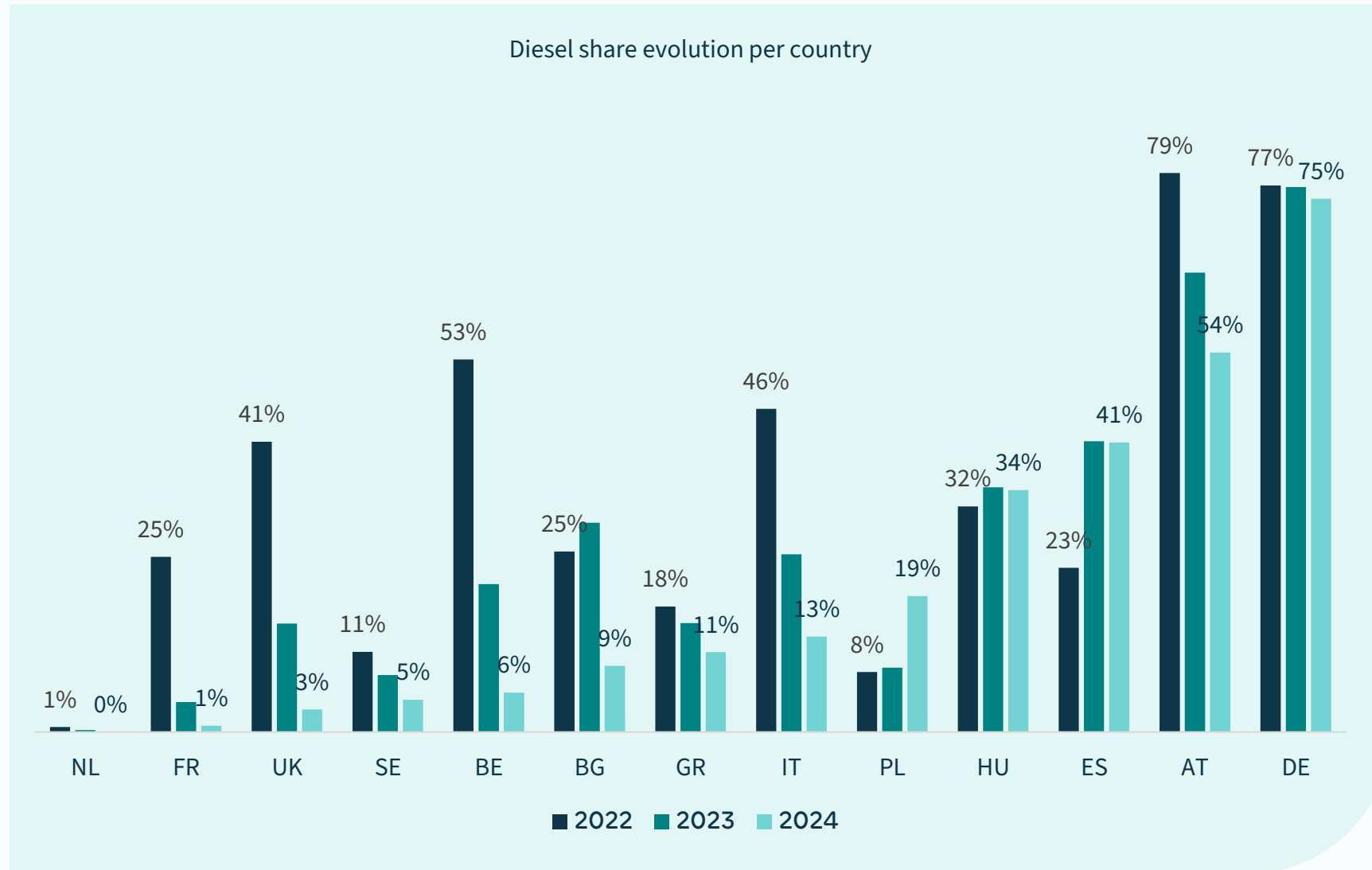
Since 2022, the share of diesel cars in consumer goods fleets has almost halved, with most being replaced by hybrids, plug-in hybrids or BEVs.

Petrol use is also down, falling from 21% in 2022 to 16% in 2024.

■ BEV ■ Hybrid ■ PHEV ■ Diesel ■ Petrol ■ Other



Diesel share is decreasing in all countries except Poland, Hungary and Spain



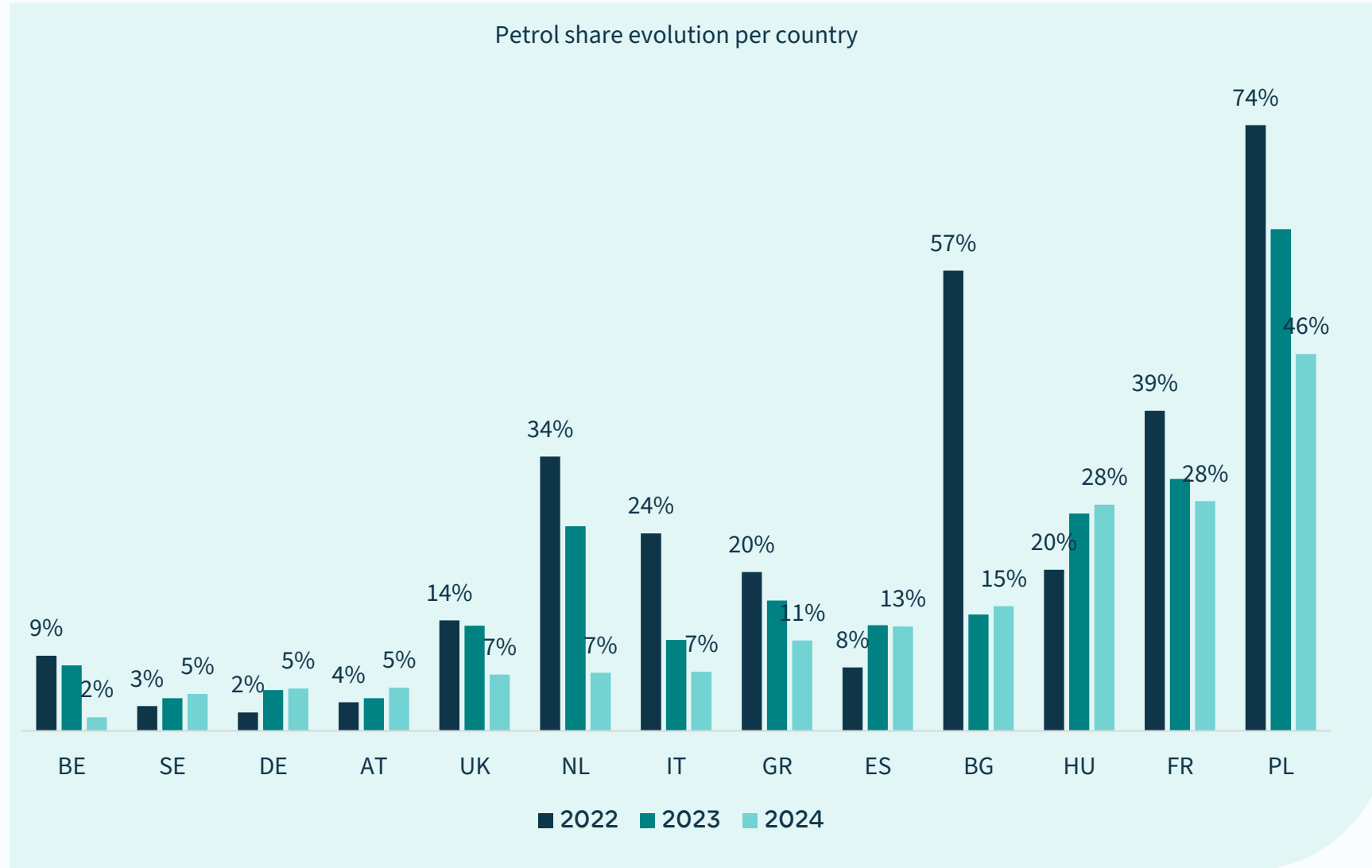
Most countries are reducing diesel, with the biggest drops in France, the UK, Belgium and Italy, where diesel went from 25–50% in 2022 to single digits in 2024. France now has just 1% diesel in new fleets.

The Netherlands has stayed low, with little or no diesel for the past three years.

But in Spain, diesel share rose sharply (23% in 2022 → 41% in 2024). Smaller increases also appeared in Poland and Hungary.



Almost all countries have decreased the share of petrol vehicles in international consumer goods industry fleets

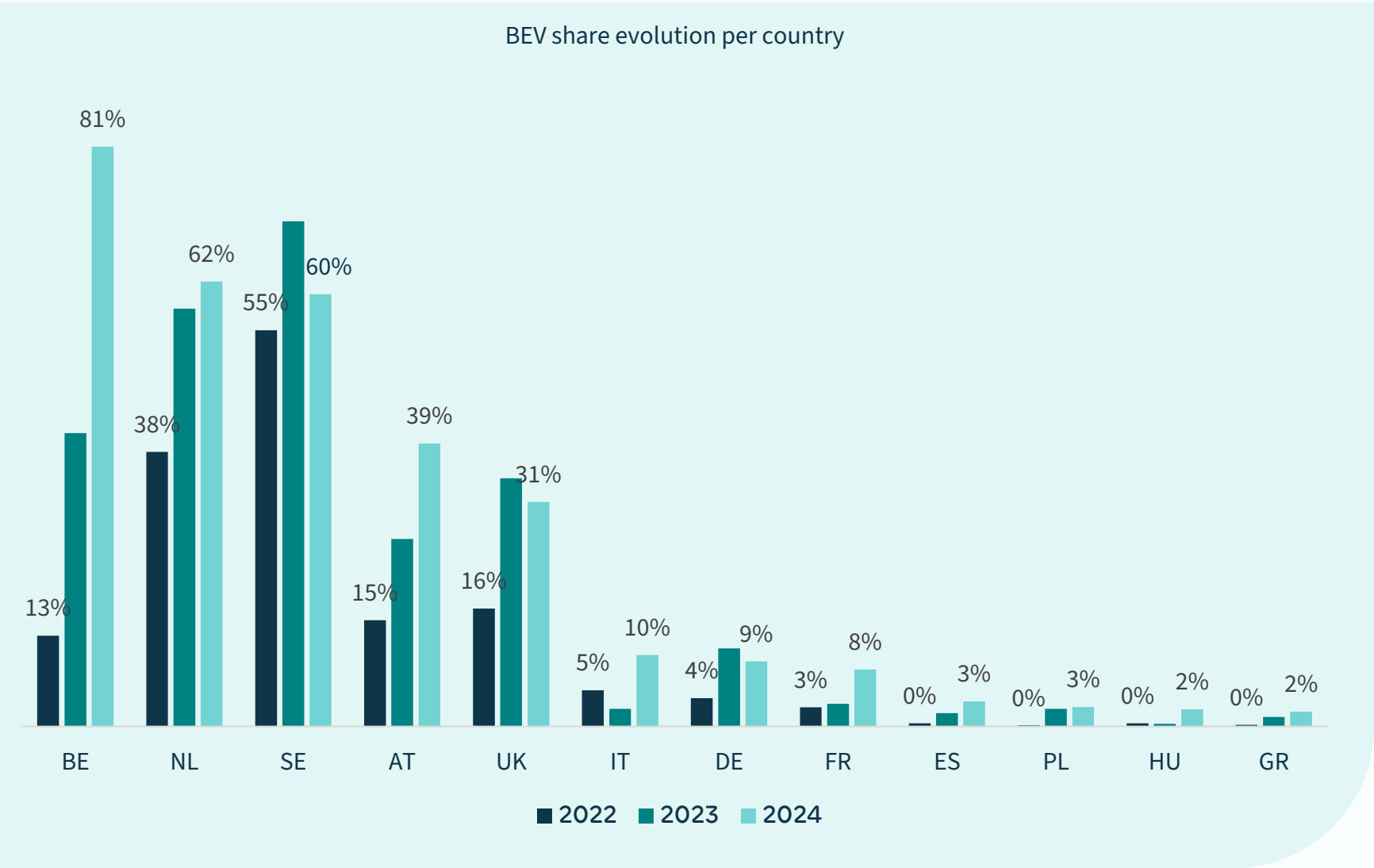


Almost all countries cut petrol shares, with the steepest drops in Bulgaria (57% → 15%) and the Netherlands.

Spain and Hungary were exceptions, with slight increases in petrol since 2022.



BEV uptake is growing, led by Belgium, the Netherlands and Sweden

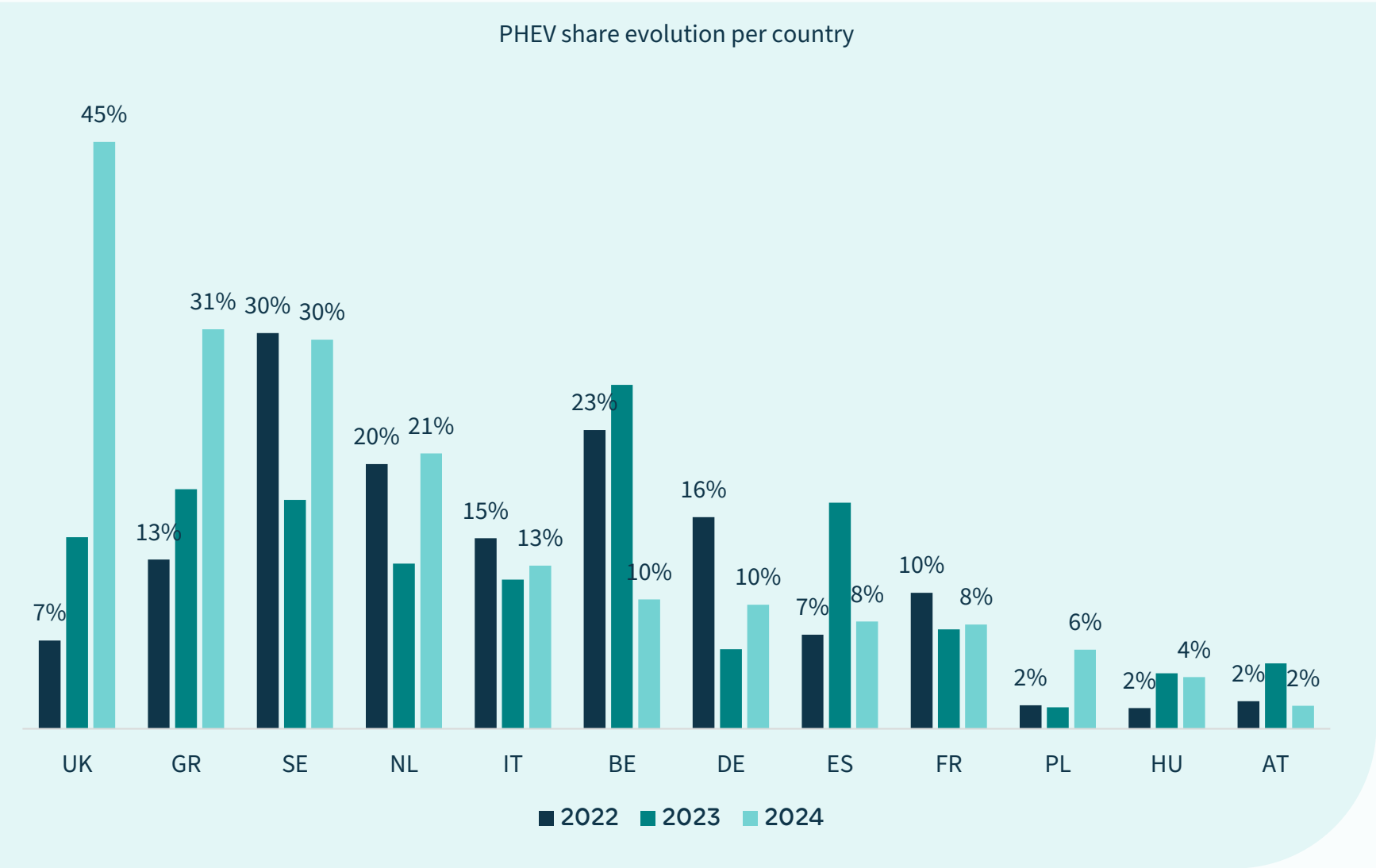


All countries increased BEV shares since 2022, with the biggest jumps in Belgium and Austria.

Germany, France and Italy are adding BEVs, but at a slower pace than other industries.



Consumer goods fleets in the UK have seen the largest increase in plug-in hybrid electric vehicles (PHEV) since 2022

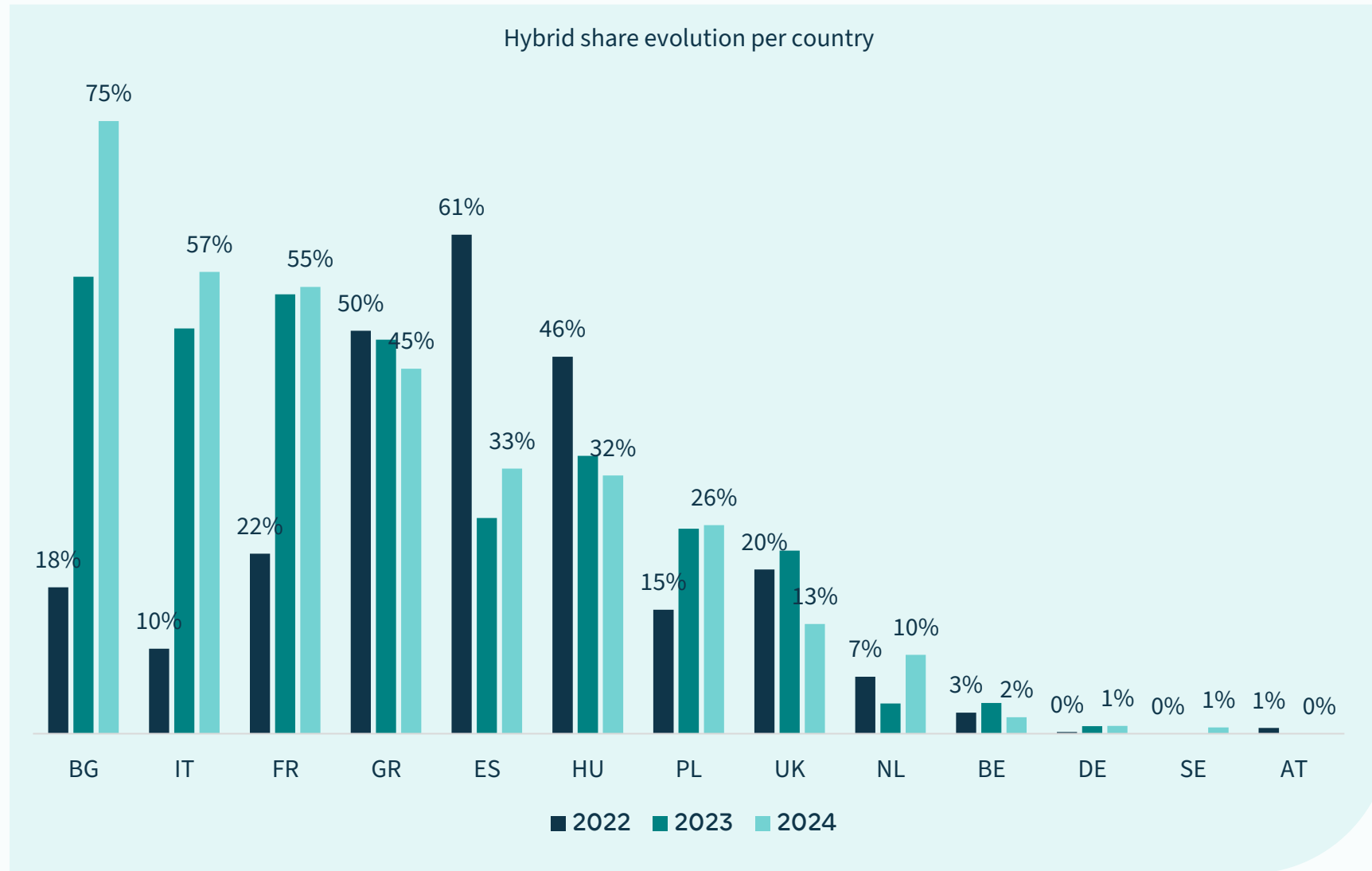


In most countries, plug-in hybrid (PHEV) shares stayed fairly stable.

Belgium, Italy and Germany were the only countries to reduce their PHEV share.



Consumer goods fleets in Bulgaria have drastically increased the share of hybrid cars in fleet with 75% of new cars being hybrids



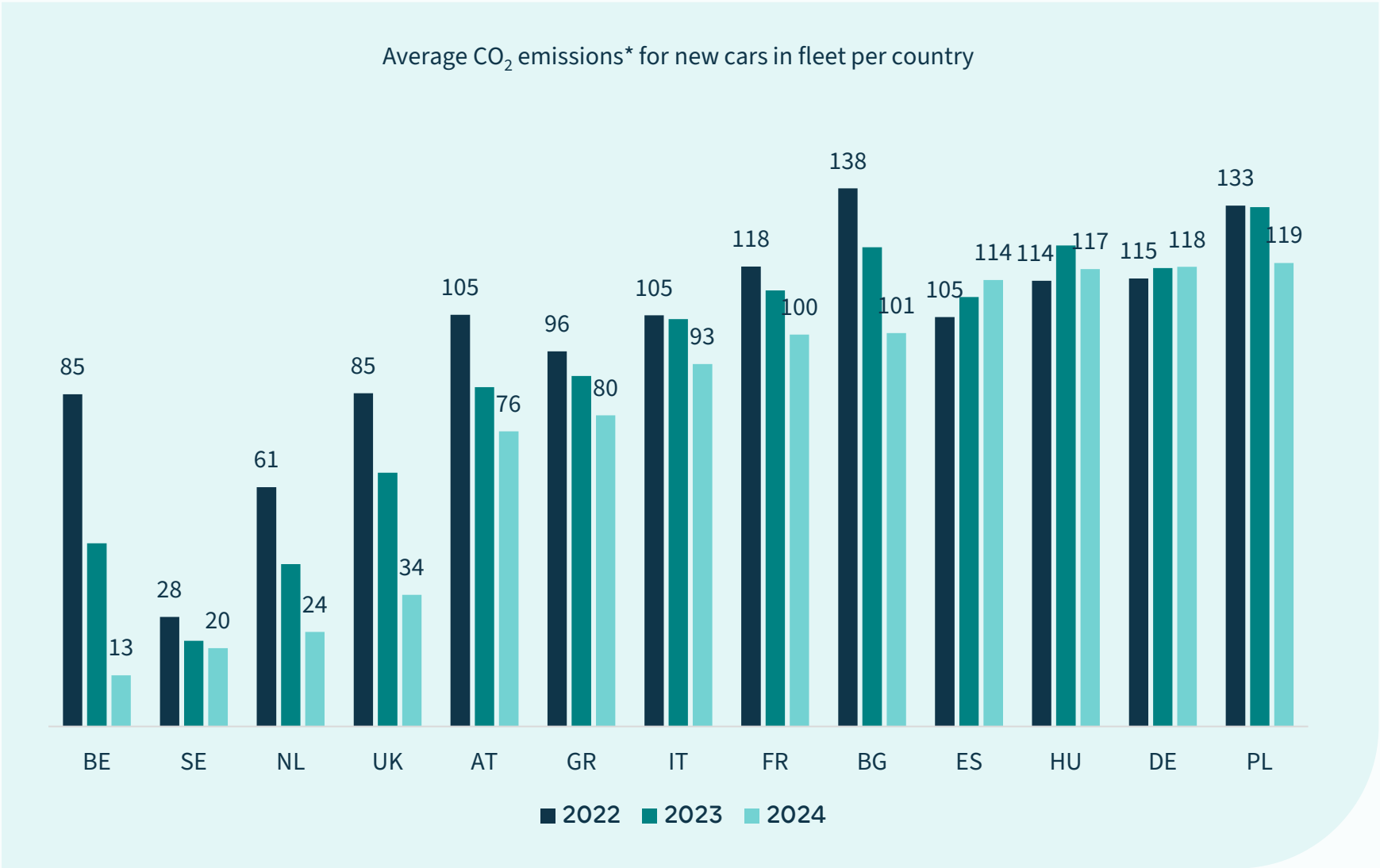
Italy and France also more than doubled their hybrid shares since 2022.

By contrast, Spain, Hungary and the UK saw declines.

Shares remain very low (under 3%) in Belgium, Germany, Sweden and Austria.



Average emissions have decreased by 22% since 2022



The biggest progress came in Belgium, dropping from 85 g/km in 2022 to just 13 g/km in 2024 thanks to the strong move from diesel to BEVs.

Spain and Germany bucked the trend, with emissions rising since 2022.



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

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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