

# Energy and chemicals industry benchmark

2025

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# Introduction

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

The following definition of the energy and chemicals industry has been applied:

*Companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals.*

This analysis of fleet trends is based on Ayvens' passenger car data from 54 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:



Overall, the share of diesel vehicles is low, and all countries have decreased the share of diesel vehicles in fleet since 2022. The highest share (55%) was in the Czech Republic



Battery electric vehicles (BEVs) have the highest share in the energy and chemicals industry fleets, but petrol vehicles still hold around one third of the shares,



Continuous downward trend for average CO<sub>2</sub> emissions\* in the energy and chemicals industry fleets, with the change primarily being driven by a decrease in petrol and diesel cars and increase in BEVs.

\*OEM estimated emissions



# The SUV-D1 is the most popular segment in energy and chemicals industry fleets in 2024

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

Most popular car  
segment: SUV-D1



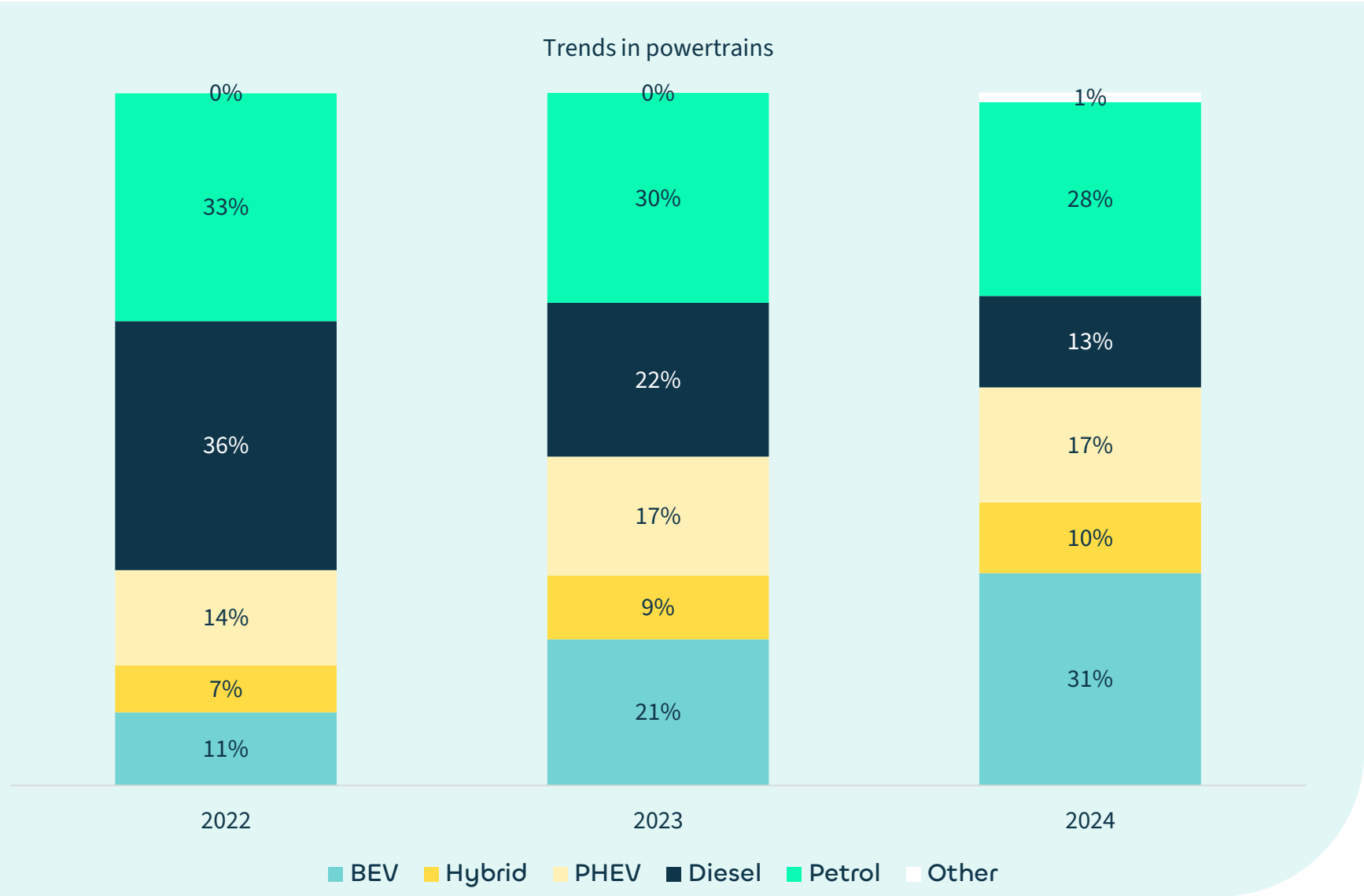
# Peugeot 308 is the most popular in 2024 in energy and chemicals industry fleets

	2022	2023	2024
1 <sup>st</sup>	Peugeot 2008	Peugeot 2008	Peugeot 308
2 <sup>nd</sup>	Peugeot 3008	Peugeot 5008	Peugeot 2008
3 <sup>rd</sup>	Peugeot 5008	Peugeot 3008	BMW X1
4 <sup>th</sup>	Renault Clio	Peugeot 308	Peugeot 3008
5 <sup>th</sup>	Citroen C5 Aircross	Skoda Octavia	Renault Arkana
6 <sup>th</sup>	Skoda Octavia	Renault Captur	Kia Sportage
7 <sup>th</sup>	Renault Megane	Tesla Model Y	Peugeot 5008
8 <sup>th</sup>	Peugeot 308	Ford Kuga	Skoda Enyaq
9 <sup>th</sup>	BMW 3 Series	Volvo XC40	Tesla Model Y

Most popular car:  
Peugeot 308



# Battery electric vehicles are now the most popular powertrain in energy & chemical industry fleets



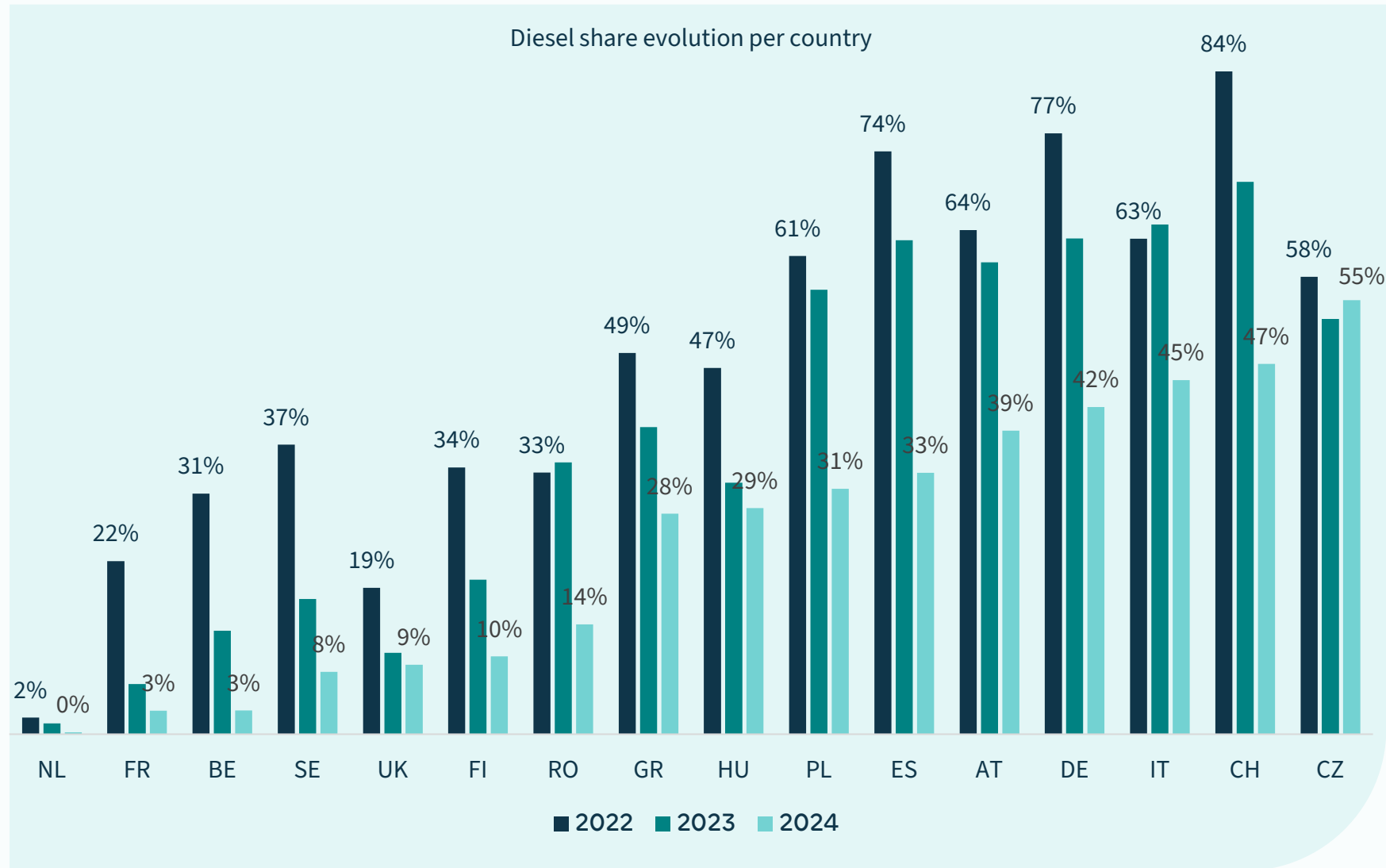
PHEV and hybrid shares remained stable in the last two years.

There has been a significant decrease in share of diesel vehicles, dropping almost two thirds from 2022 to 2024.

The decrease in diesel share has resulted in an increase in BEVs in fleet.



# Share of diesel dropped significantly in most markets for the energy and chemicals industry



The Netherlands reached 0% in diesel share in 2024, a similar trend is seen across other industries for diesel cars in the Netherlands.

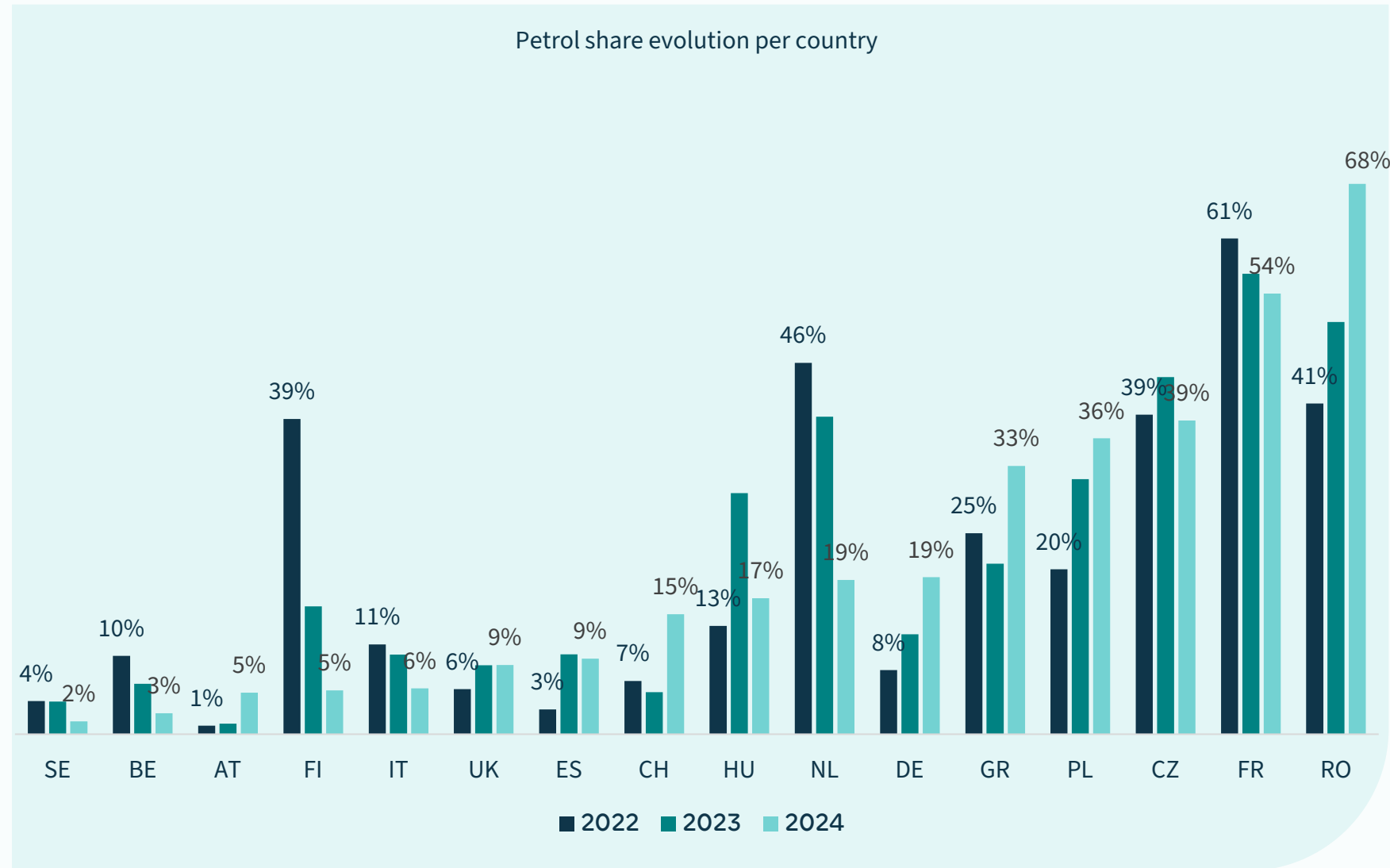
The highest share of diesel vehicles in the industry (for Czech Republic) at 55%, a small decrease compared to 2022.

Belgium, Poland, Spain and Switzerland have all seen large decreases in new petrol vehicles in fleet from 2022-2024.





# Petrol share is under 15% for half of the countries however, there have been slight increases in a few countries since 2022

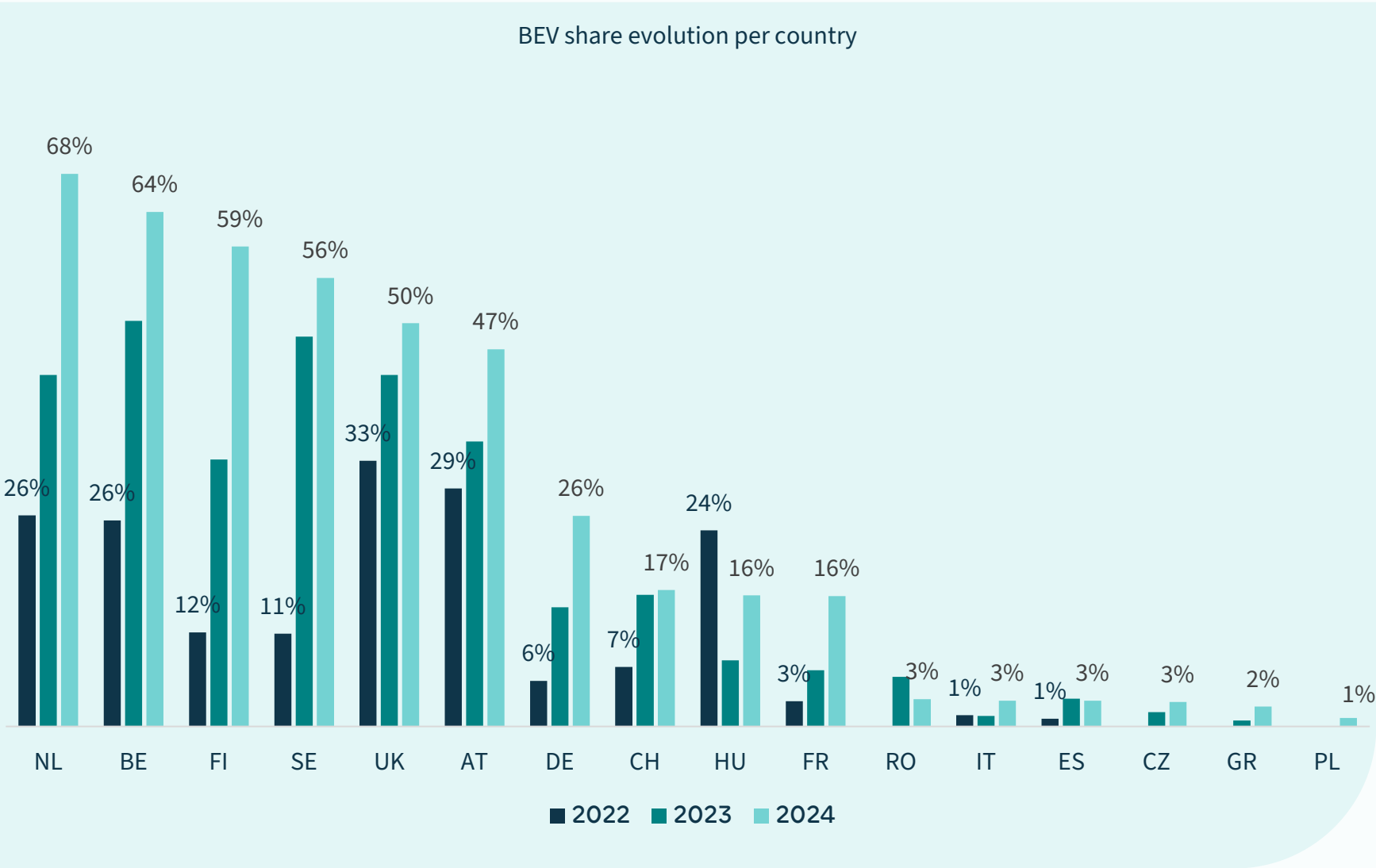


The highest share of petrol vehicles for the energy and chemicals industry is in Romania, France, and Czech Republic, with Romania's share increasing considerably in the last three years.

We see the biggest drop in Finland, followed by the Netherlands.



# Six countries are leading the way when it comes to battery electric vehicle adoption



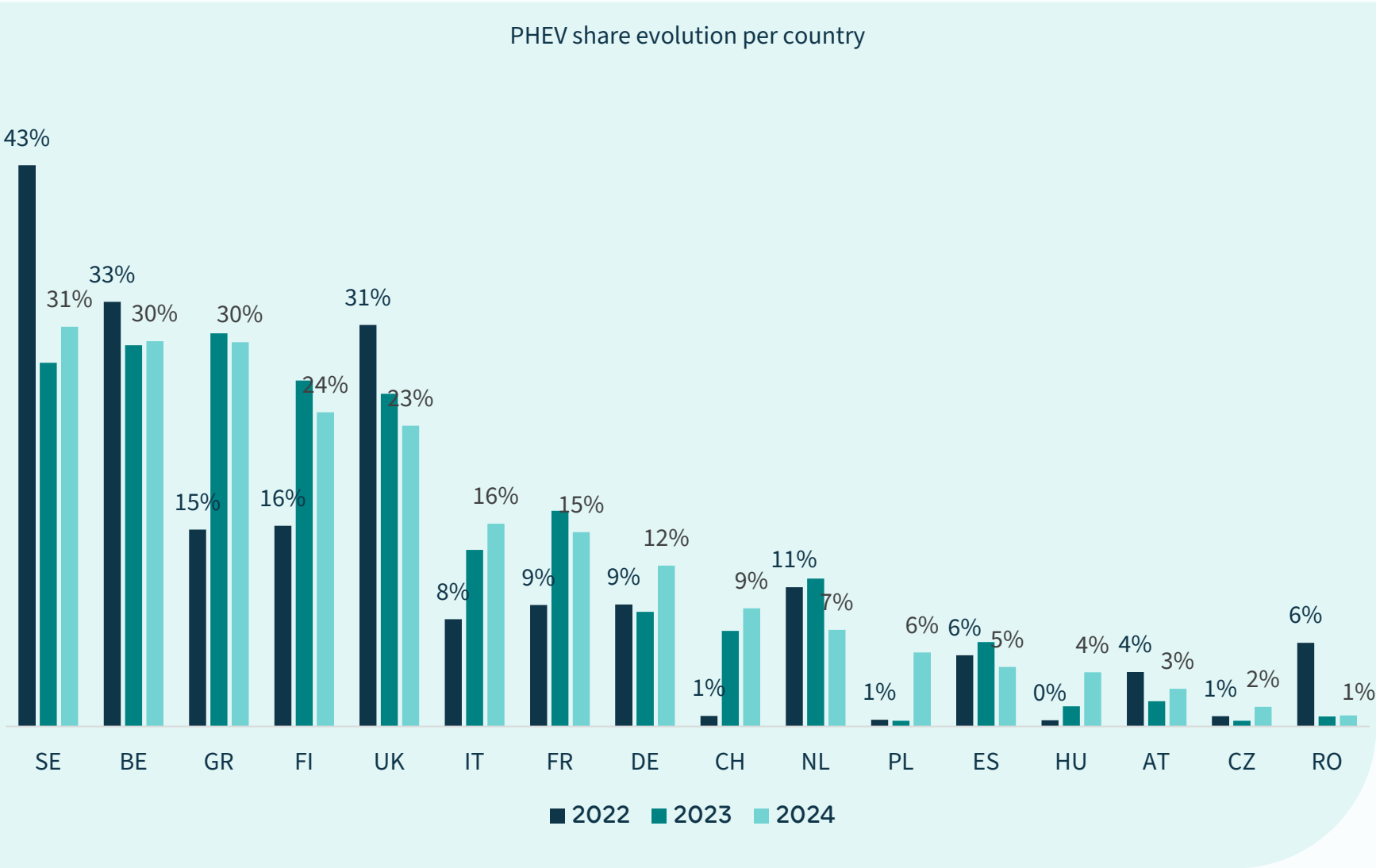
The Netherlands has the highest share of BEVs for the energy and chemicals industry fleets, followed closely by Belgium and Finland.

Very low percentages for BEV vehicle share in fleets in Romania, Italy, Spain, Czech Republic, Greece and Poland

We see the highest share decrease since 2022 in Hungary, with 8% drop in percentage points



# Minor fluctuations on average in share of plug-in hybrid electric vehicles (PHEVs) between 2023 and 2024



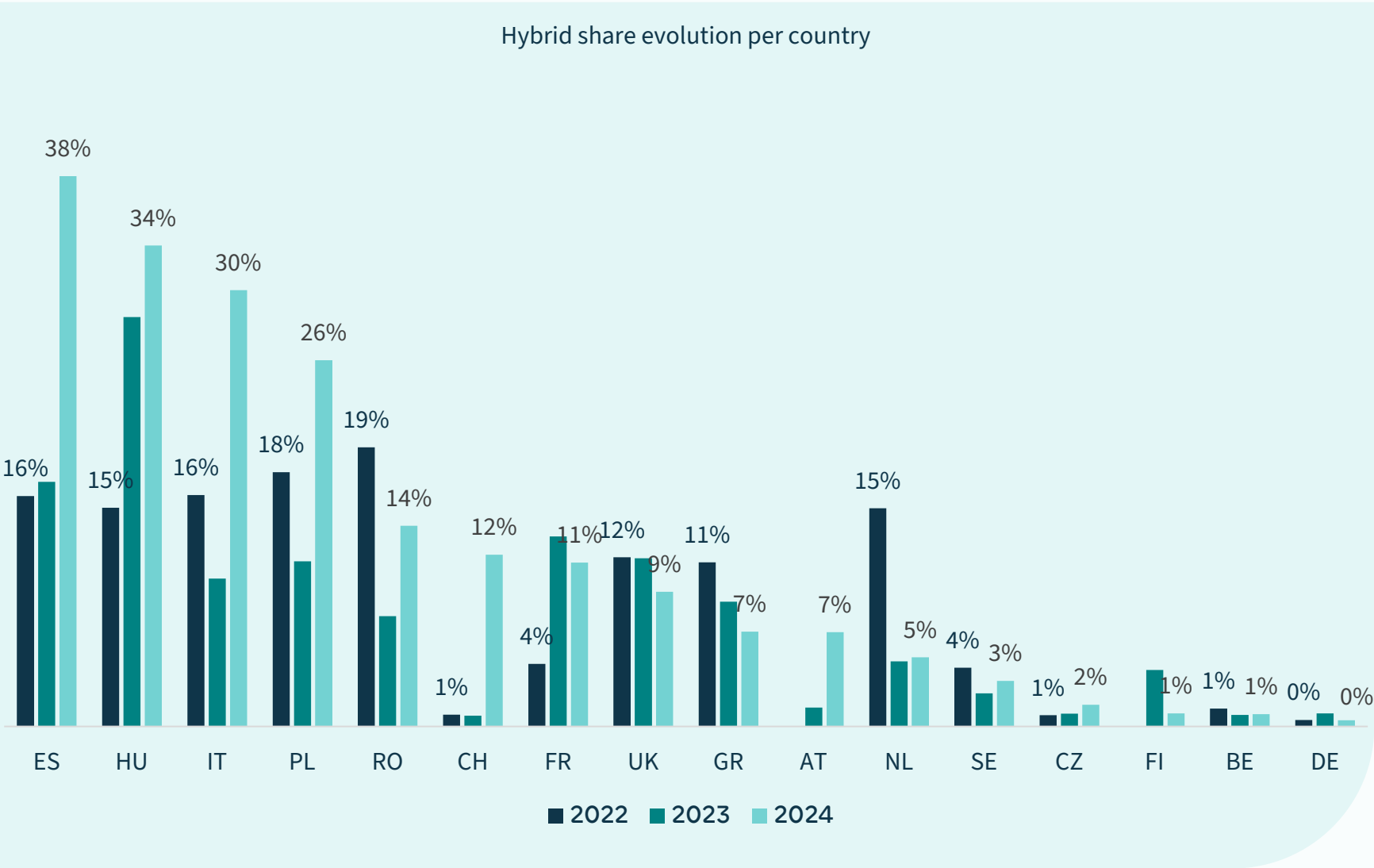
Greece and Italy doubled their share percentage for PHEVs from 2022 to 2024 while for Switzerland it increased by 89%

Only 5 countries in the energy and chemicals industry had more than 20% share of PHEV in their fleets in 2024.

The only countries to significantly decrease the share of PHEVs in fleet are Sweden, the UK and Romania.



# Share of hybrid vehicles under 20% in the energy and chemicals industry fleets for most countries



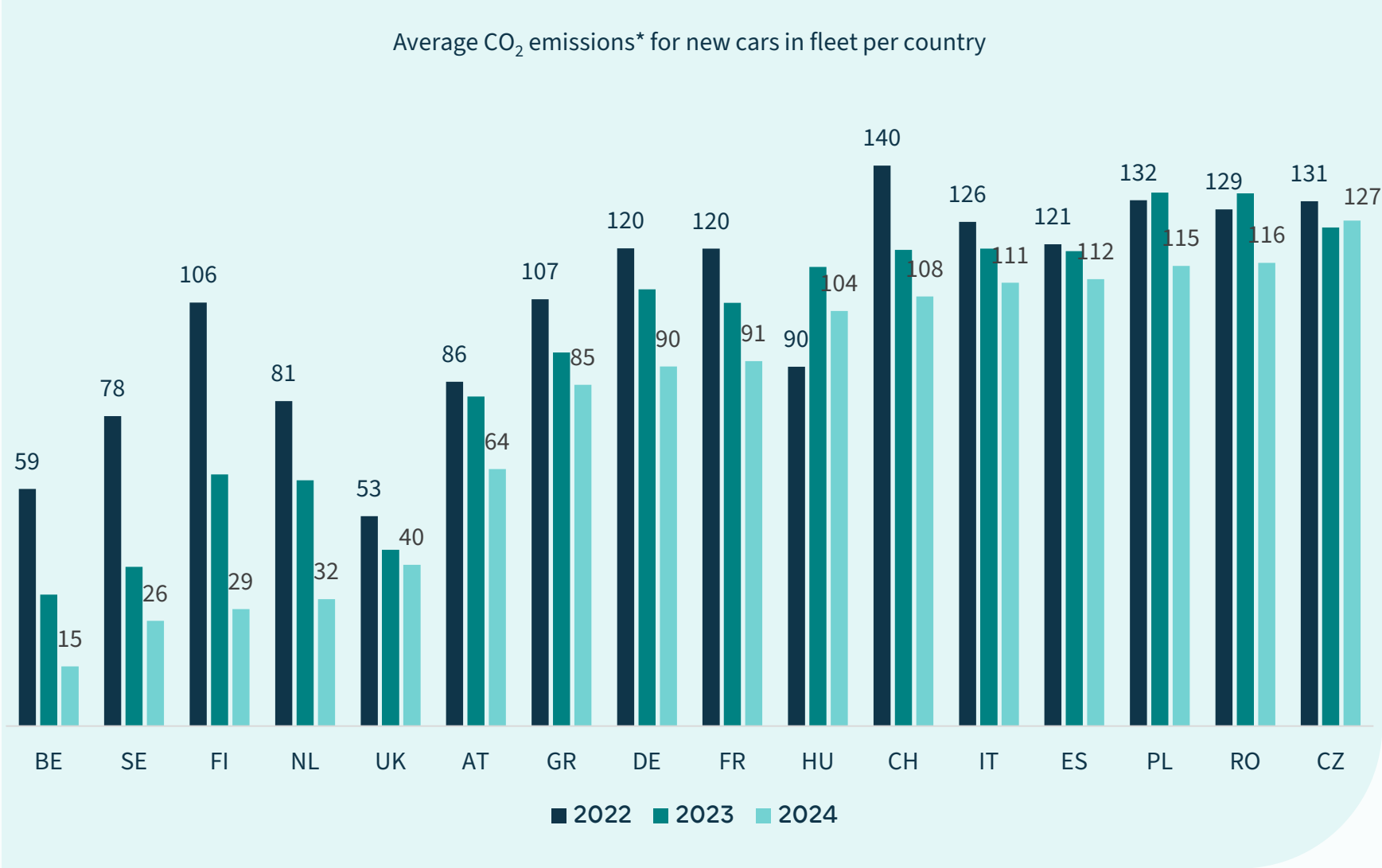
Spain has the highest share of hybrid vehicles at 38% while Germany is at 0%.

The Netherlands dropped by ten percentage points in the last two years, most likely in favour of BEVs.

Hybrids have grown significantly in popularity in Spain, Hungary and Italy since 2022.



# Continuous downward trend for average CO<sub>2</sub> emissions\* in the energy and chemicals industry fleets



Finland saw the most significant drop from 2022 until 2024 with a 73% decrease

Energy and chemicals industry fleets have the highest average CO<sub>2</sub> emissions in Czech Republic for two years in a row.

Belgium, Sweden, Finland, the Netherlands and the United Kingdom have average CO<sub>2</sub> emissions below 50.



# 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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