

Healthcare industry benchmark

2025



Better with every move.

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Introduction

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

The following definition of the healthcare industry has been applied:

Companies that provide services for diagnosing, preventing, treating and curing health conditions.

This analysis of fleet trends is based on Ayvens' passenger car data from 32 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:



Healthcare fleets are cutting back on diesel cars, but unlike other industries, most of these vehicles are being replaced by petrol rather than more sustainable options. Battery electric vehicles (BEVs) still make up only a very small share.



Among all industries benchmarked, healthcare fleets have the lowest share of BEVs and come last overall when it comes to fleet sustainability. That said, healthcare fleets in Germany are outperforming other industries in the country by cutting CO₂ emissions faster and replacing diesel cars with BEVs.

Most popular segment

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

Most popular car
segment: SUV-C1



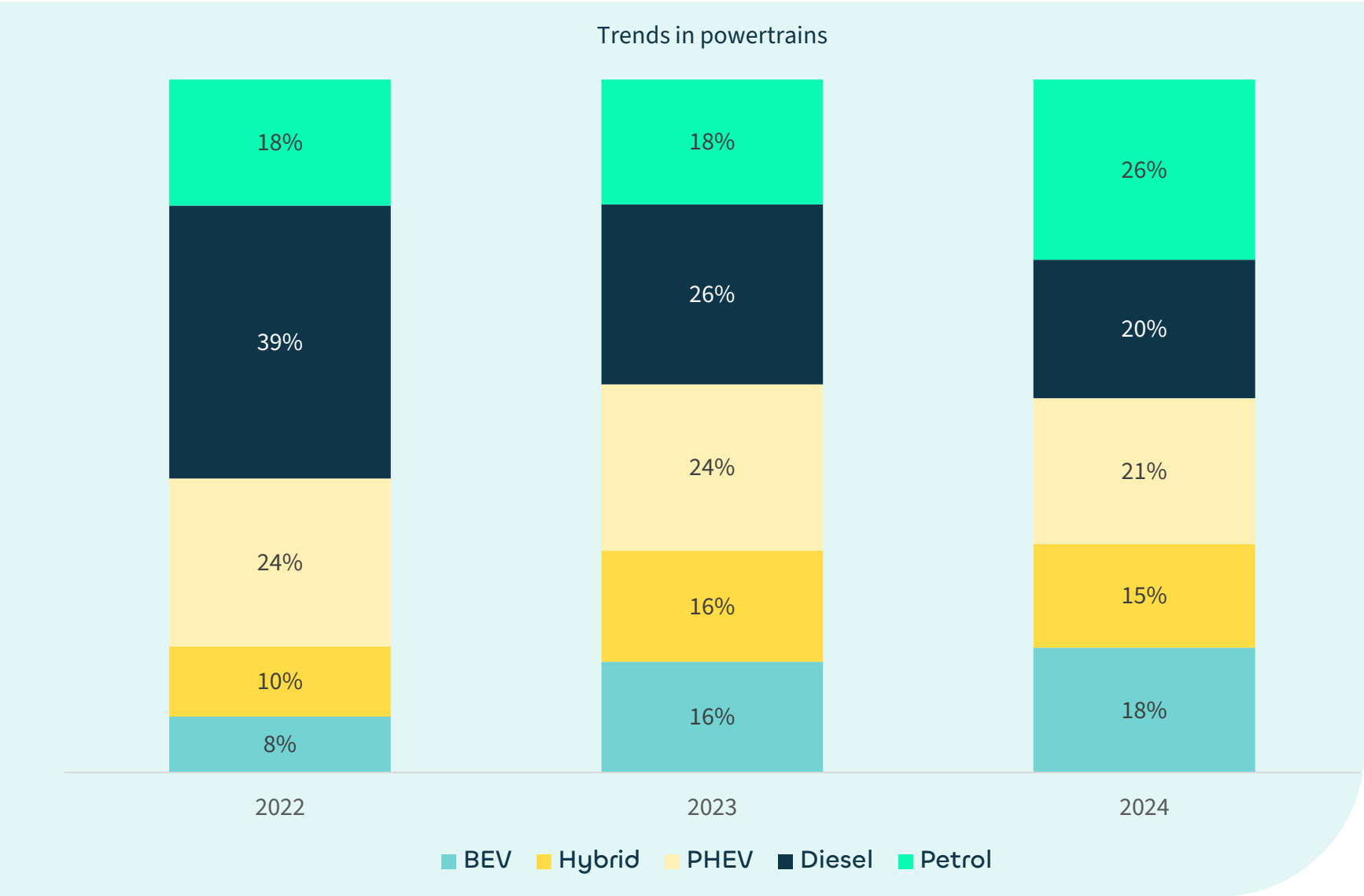
Most popular car

	2022	2023	2024
1 st	BMW 3 Series	Toyota RAV4	BMW X1
2 nd	Toyota RAV4	Tesla Model Y	Skoda Enyaq
3 rd	Peugeot 3008	BMW 3 Series	Volkswagen Tiguan
4 th	Toyota Corolla	Skoda Octavia	Toyota RAV4
5 th	Mercedes-Benz GLC Class	Toyota Corolla	Toyota Corolla
6 th	Skoda Octavia	Volkswagen Tiguan	Skoda Octavia
7 th	Volkswagen Tiguan	BMW X1	Volkswagen Polo
8 th	Volkswagen Passat	Toyota C-HR	Volvo XC40
9 th	Volvo XC60	Mercedes-Benz C Class	BMW 3 Series

Most popular car:
BMW X1



Diesel down, petrol up and EVs are lagging

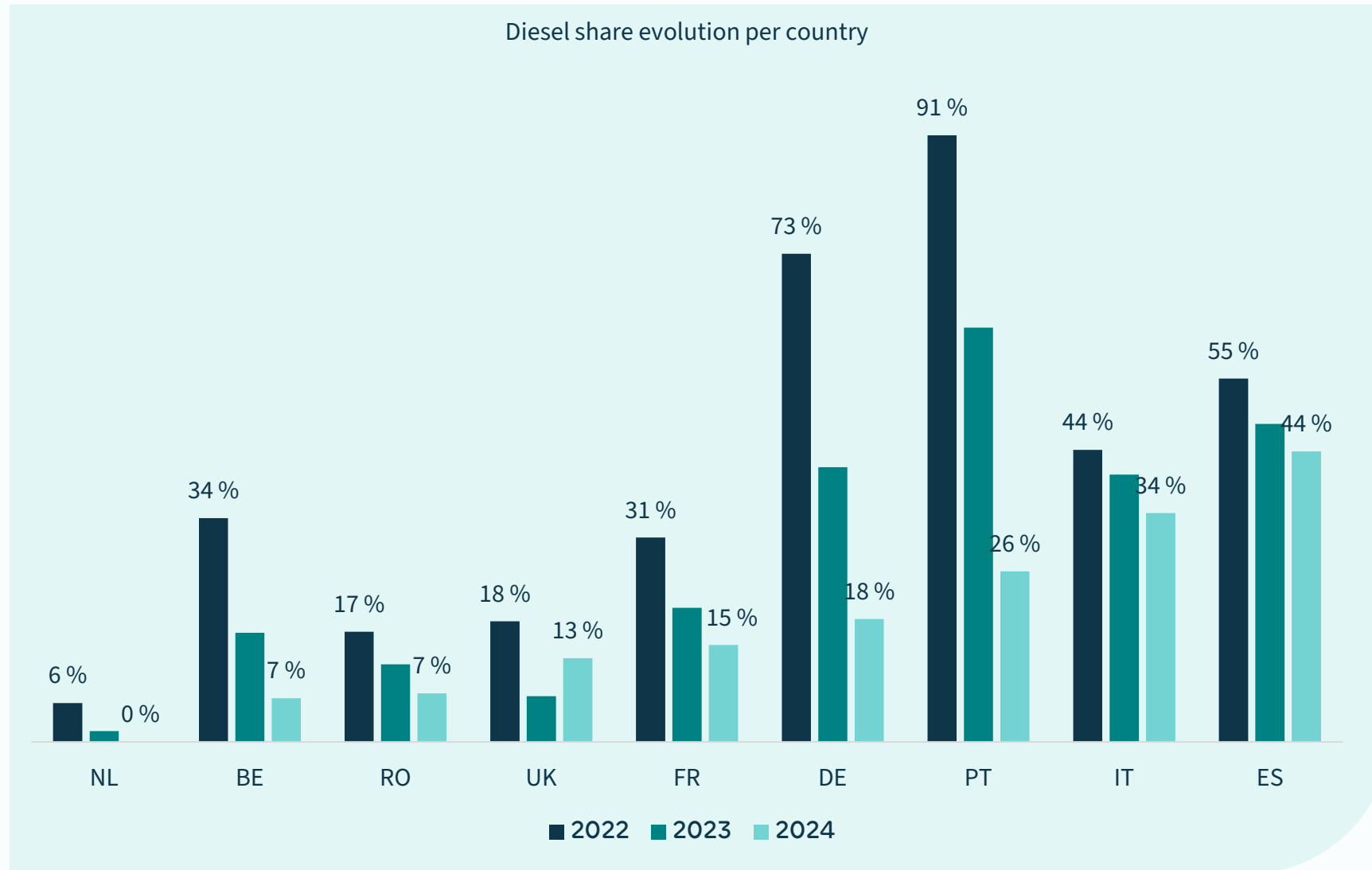


Across countries, the share of new diesel cars in healthcare fleets has dropped by nearly 50% since 2022. But in most cases, these cars are being replaced with petrol vehicles rather than more sustainable powertrains.

BEV adoption has more than doubled since 2022, but growth is still slower than in other industries.



All countries have decreased the share of diesel cars in fleet, like the trend seen in all other industry fleets

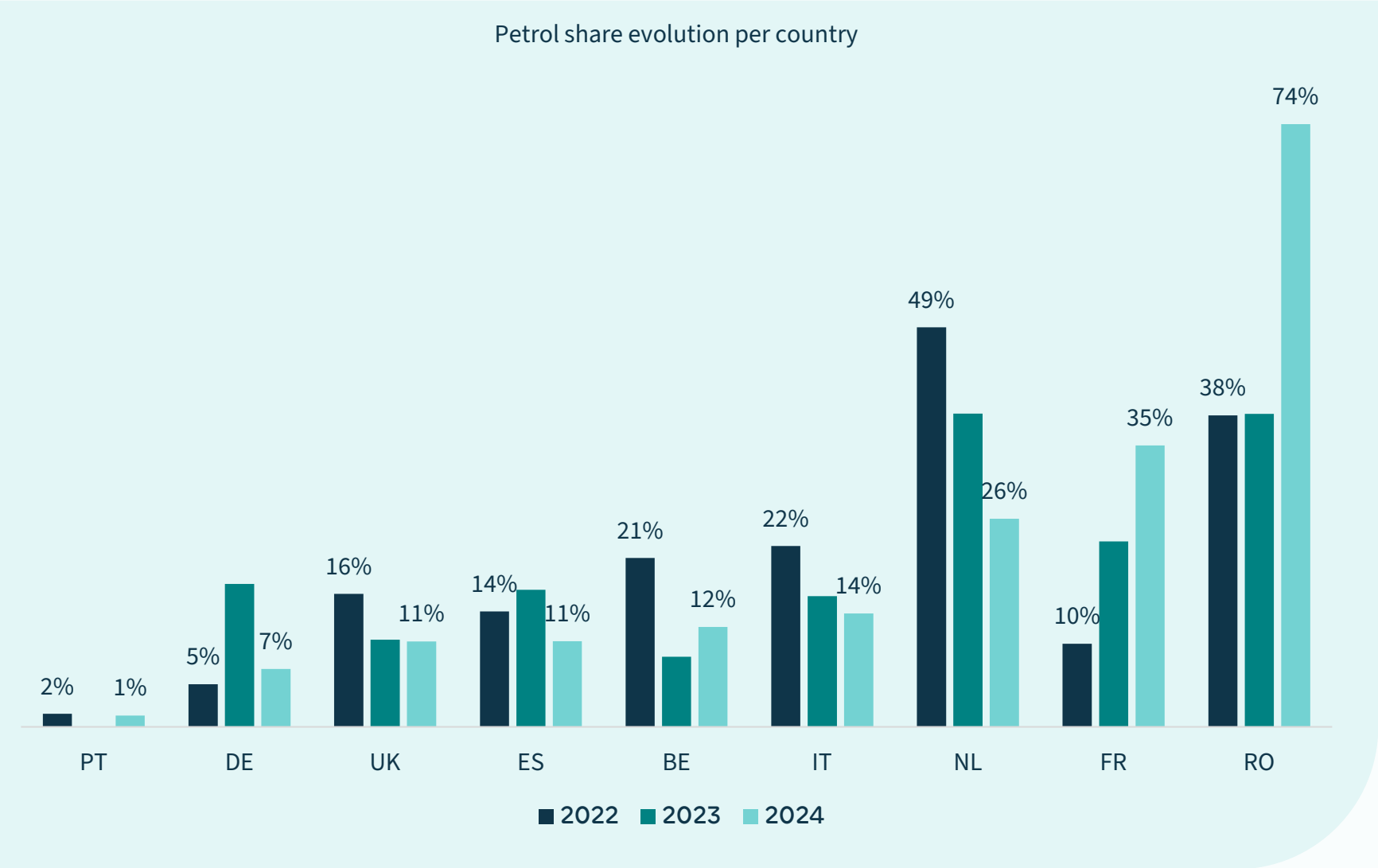


The biggest drops are in Germany (where fleets switched to BEVs) and Portugal (where fleets turned to hybrids and PHEVs).

All countries now have less than half of new vehicles being diesel.



Most countries have decreased the share of petrol cars in healthcare industry fleets, except in France and Romania

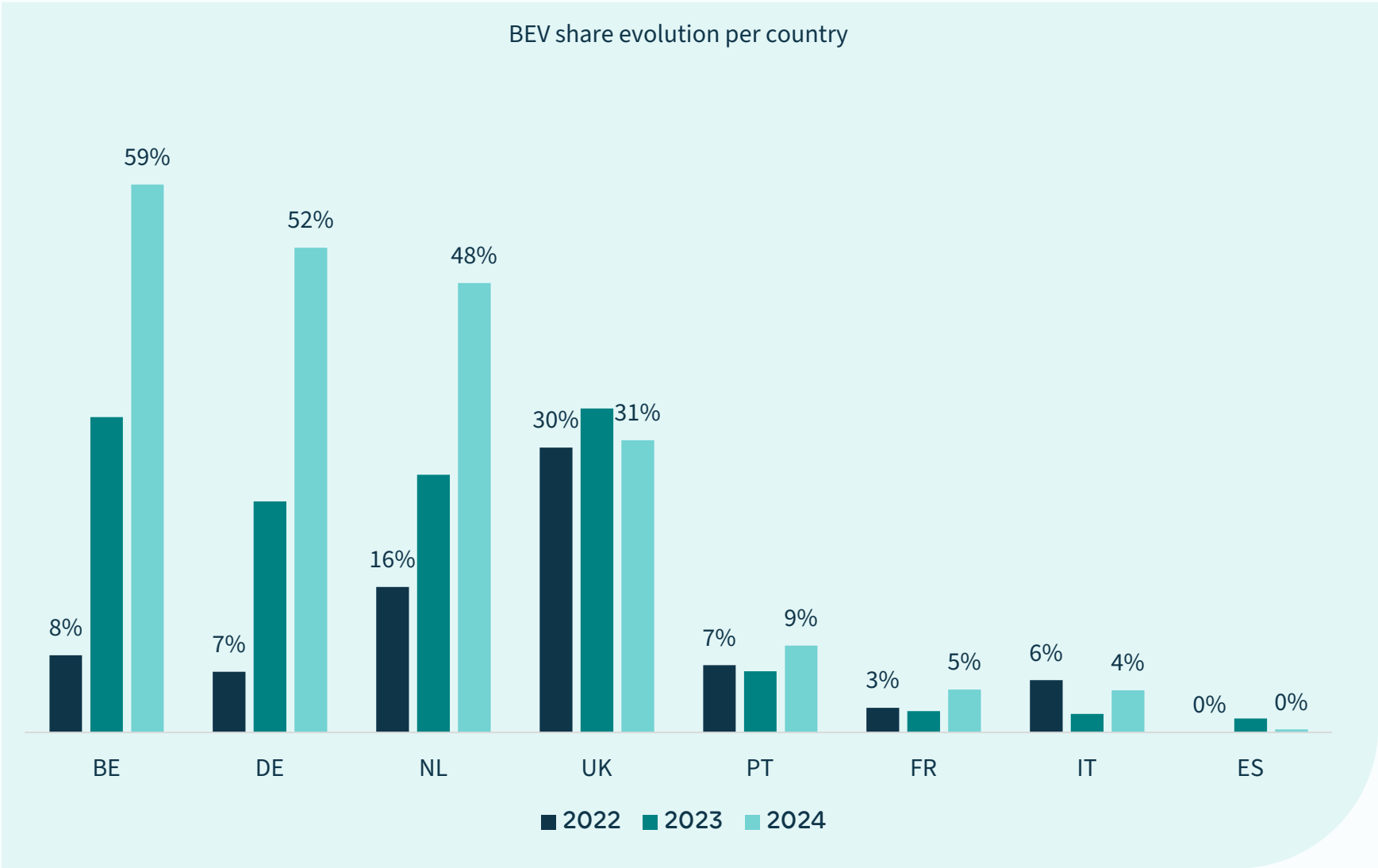


Most countries have reduced petrol share, but France and Romania went the opposite way, with big increases in 2024.

The sharpest fall was in the Netherlands, dropping from 49% in 2022 to 26% in 2024.



Most countries have increased the share of battery electric vehicles (BEVs) in fleet with the largest increase in Belgium

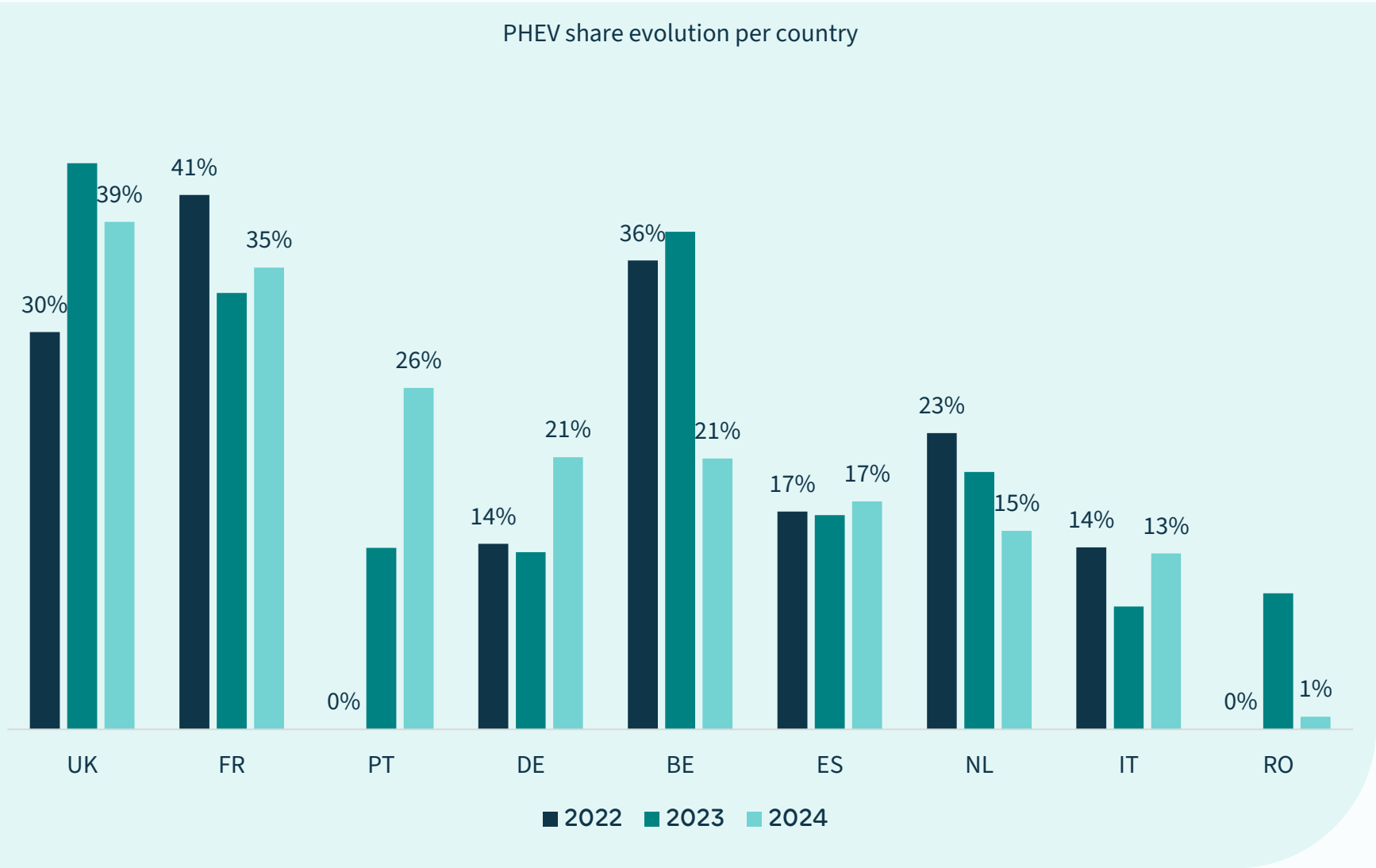


BEV share has grown in most countries, led by Belgium and Germany, where healthcare fleets jumped from single digits in 2022 to over 50% in 2024.

The UK, Portugal and France saw only small increases, while Spain and Romania had no new BEVs at all in 2024.



Most healthcare fleets have only small changes in the share of plug-in hybrids (PHEV) in fleet



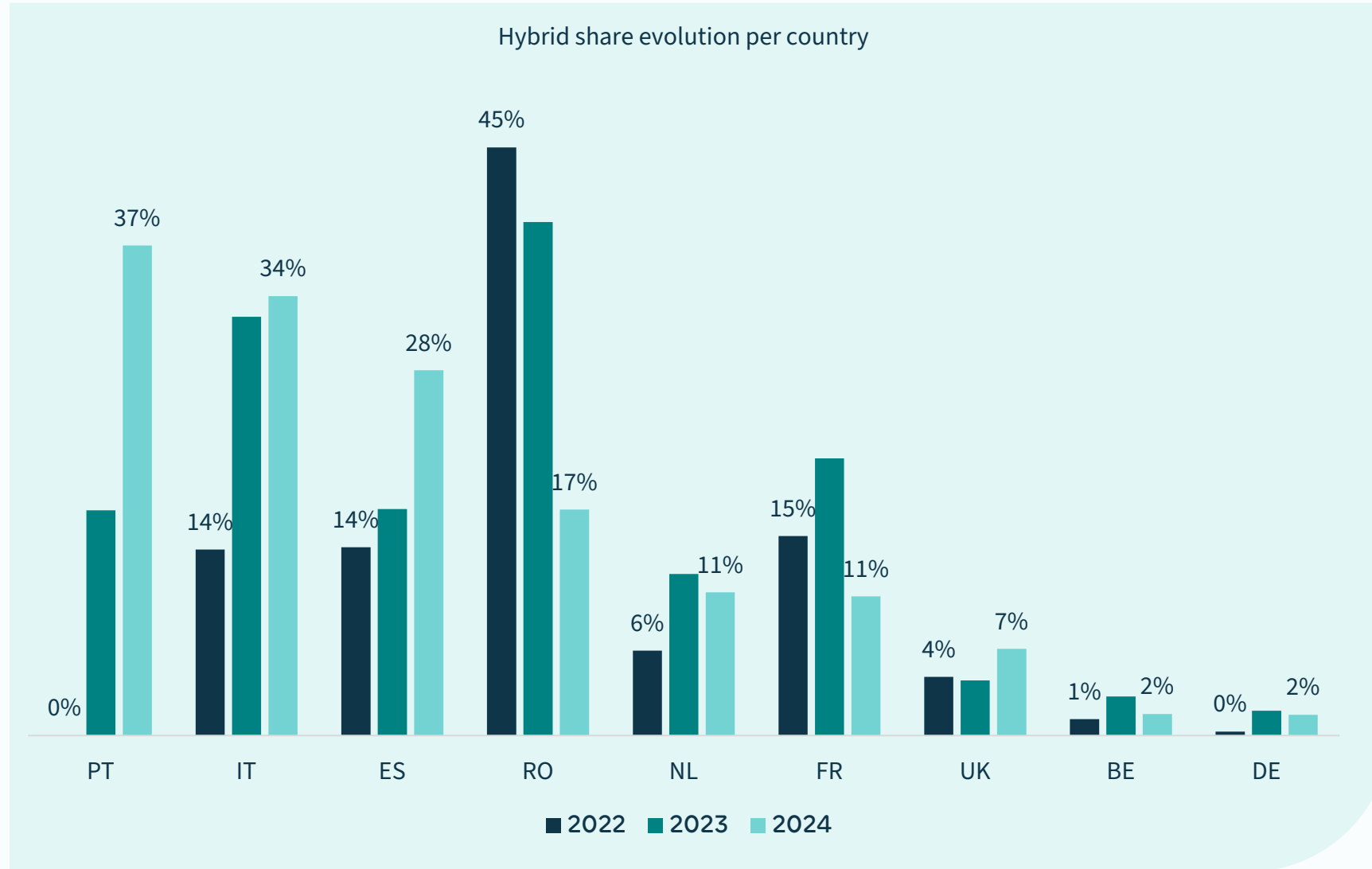
Portugal showed the biggest growth, from 0% in 2022 to 26% in 2024.

Only the UK, Portugal and Germany increased PHEV share over the past three years.

Belgium and Romania moved in the opposite direction, with sharp declines in 2024.



The share of new hybrid cars in fleet is increasing in Portugal, Italy and Spain



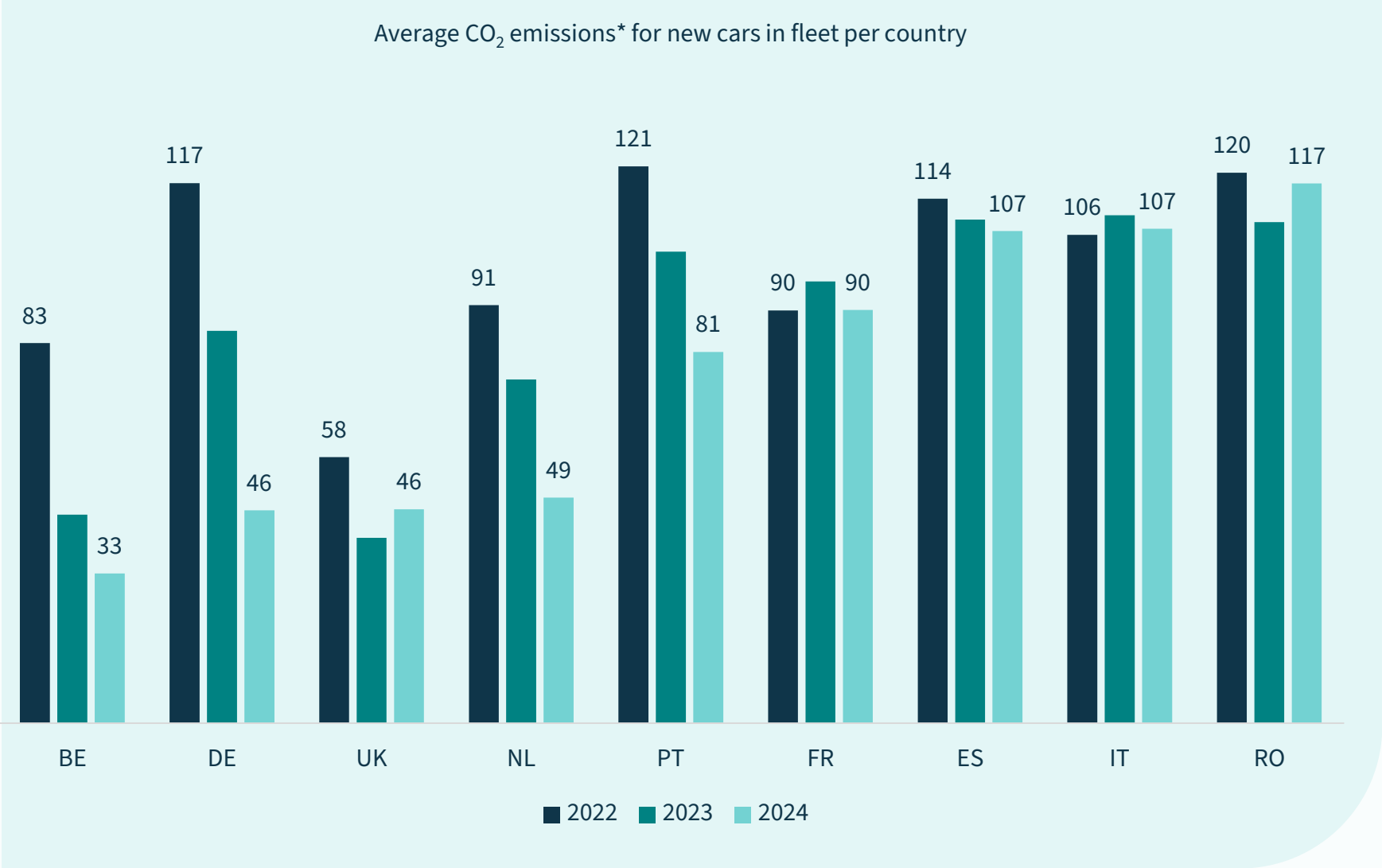
Uptake is mixed, much like in other industries.

Portugal, Italy and Spain saw the biggest increases.

In contrast, Romania cut its hybrid share by more than half, replacing them mainly with petrol cars.



Average CO₂ emissions for new cars in international healthcare fleets have dropped by 33% since 2022



The biggest improvements came in Germany and Belgium, driven by the switch from diesel to BEVs.

Italy and France, however, bucked the trend and have not reduced average emissions at all.



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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