

Industrial industry benchmark

2025



Better with every move.

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Introduction

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

The following definition of the Industrial industry has been applied:

Companies producing or maintaining physical material or products for the B2B sector.

This analysis of fleet trends is based on Ayvens' passenger car data from 55 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:



There has been a significant decline in diesel and petrol vehicle shares across most countries from 2022 to 2024. Conversely, there has been a noticeable increase in battery electric vehicle (BEV) with Denmark leading in the share of new BEVs in fleet.



The C1 segment has consistently been the most popular car segment in industrial industry fleets from 2022 to 2024, with the Skoda Octavia being the top car model in 2024



Average CO₂ emissions have decreased across all countries since 2022, with Denmark and Sweden showing the lowest average emissions in 2024

The C1 segment is the most popular car segment in the industrial industry fleets for the fourth year in a row

	2022	2023	2024
1 st	C1	C1	C1
2 nd	D1	SUV-D1	SUV-D1
3 rd	SUV-D1	D1	SUV-D2
4 th	SUV-C1	SUV-D2	SUV-C1
5 th	D2	SUV-C1	D1
6 th	SUV-D2	D2	D2
7 th	SUV-C2	SUV-C2	SUV-C2
8 th	SUV-B1	SUV-B1	E2
9 th	E2	C2	MPV-C1

Most popular car
segment 2024: C1



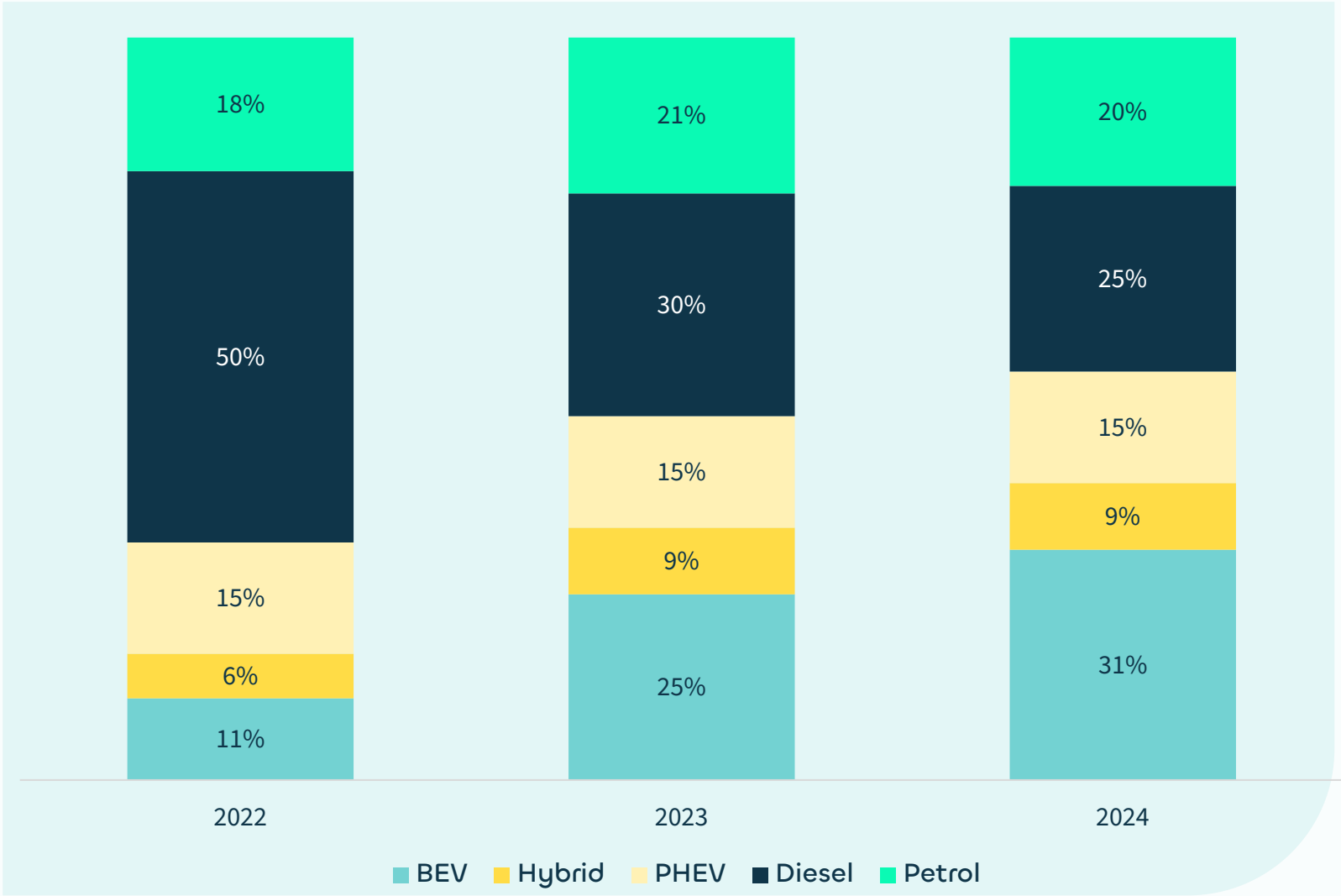
The Skoda Octavia has taken the top spot as the most popular car in industrial industry fleets in 2024

	2022	2023	2024
1st	Skoda Octavia	Skoda Octavia	Skoda Octavia
2nd	Volkswagen Passat	Tesla Model Y	Skoda Enyaq
3rd	Peugeot 3008	Skoda Enyaq	Volkswagen Golf
4th	Seat Leon	Toyota Corolla	Opel Astra
5th	Skoda Enyaq	Volkswagen Passat	BMW X1
6th	Skoda Superb	Volkswagen ID.4	Peugeot 308
7th	BMW 3 Series	Volkswagen Golf	Tesla Model Y
8th	Toyota Corolla	Seat Leon	Toyota Corolla
9th	Volkswagen Golf	Skoda Superb	Audi Q4 E-tron

Most popular car in
2024: Skoda Octavia



The share of new diesel vehicles in fleet has halved since 2022



The share of battery electric vehicles is increasing steadily every year and diesel halved since 2022.

Hybrids and plug-in hybrid (PHEV) shares have remained relatively stable over the past 3 years.



Most countries saw a significant decline in diesel share in industrial industry fleets from 2022 to 2024



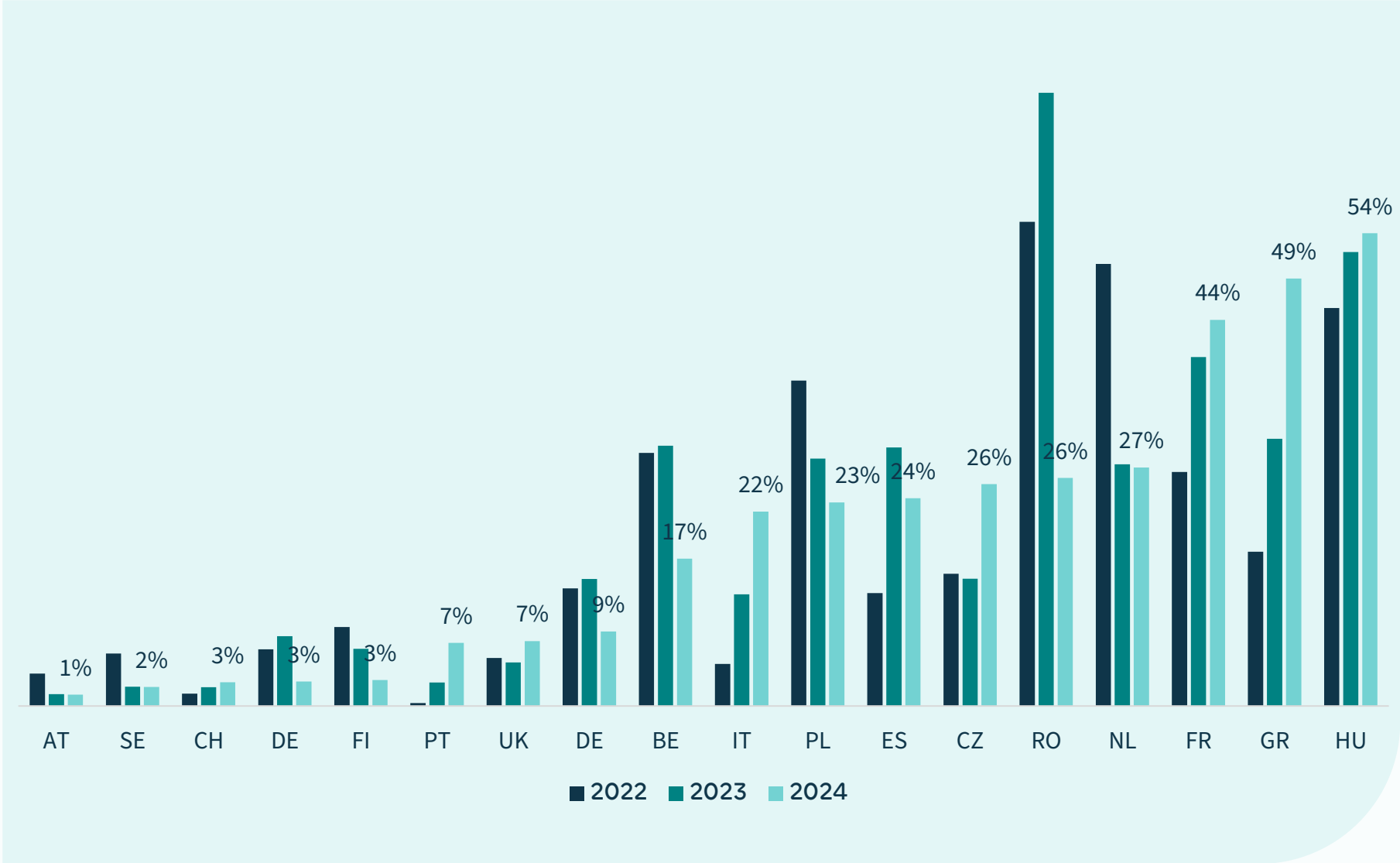
Portugal had the highest diesel share in 2022 at 85%, but this dropped sharply to 12% by 2024.

Germany is the only country where diesel share increased since 2022, going from 60% to 64% in 2024.

No diesel cars were delivered in industrial industry fleets in the Netherlands, similar to other industries.



Most countries have seen a decrease in the share of petrol vehicles in industrial industry fleets

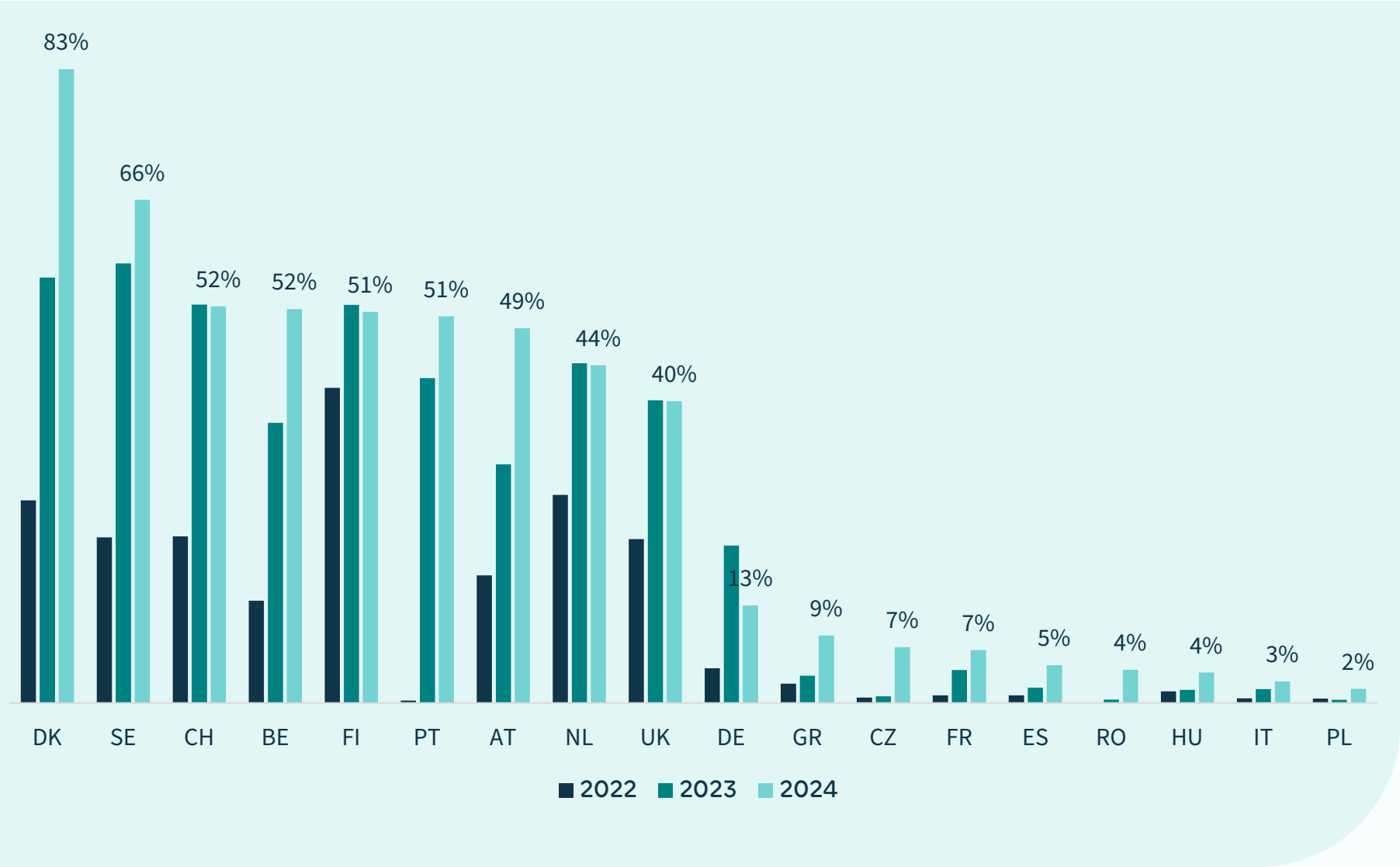


From 2022 to 2024, Romania, the Netherlands, and Belgium saw the largest decrease in petrol share.

Some countries, like Greece, Hungary, France, Czech Republic and Spain have seen increases in the share of petrol vehicles in fleet.



Industrial industry fleets in Denmark are leading the sustainability charge with over 80% of new cars being electric



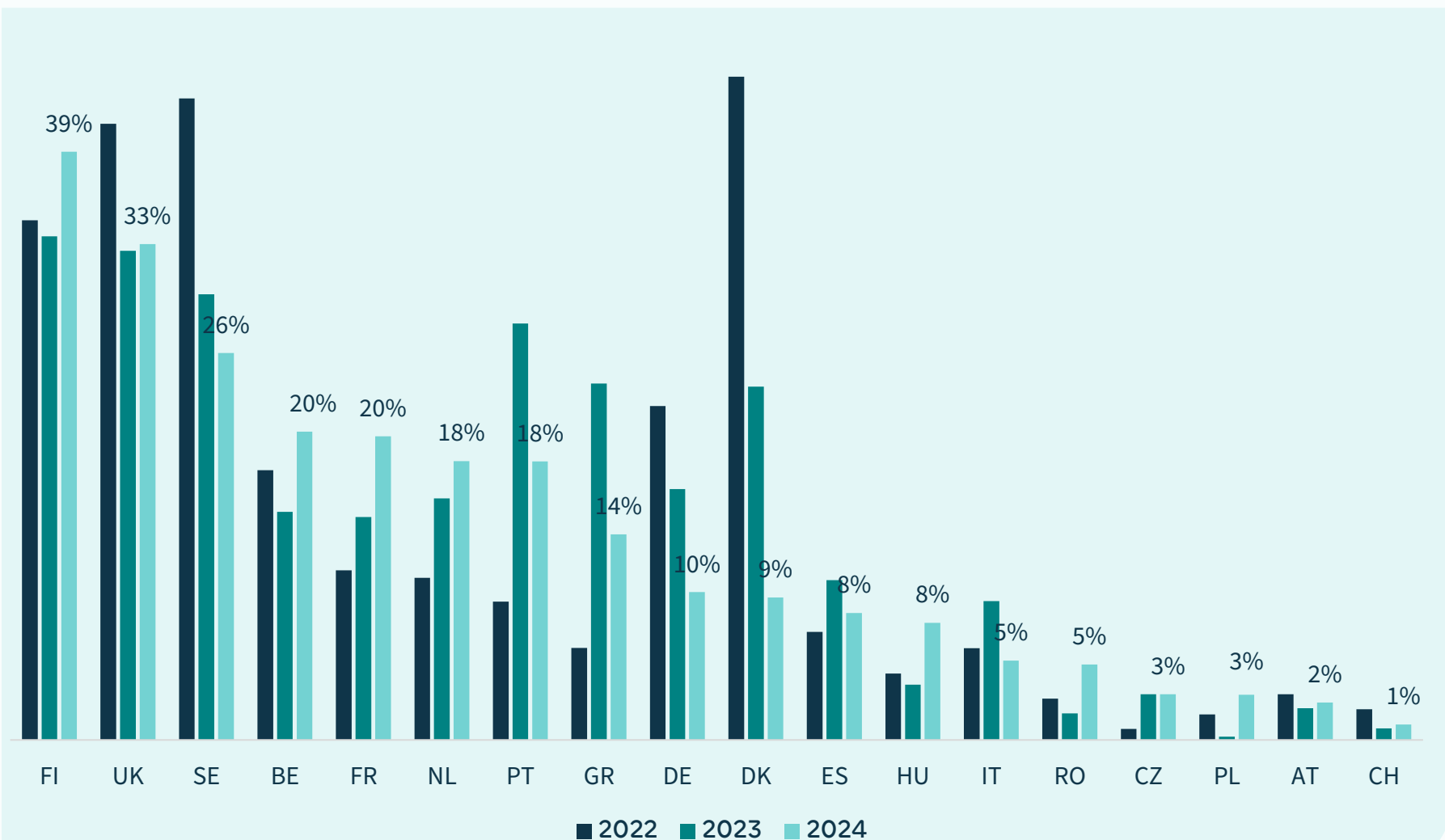
Portugal has a noticeable increase in BEV share, jumping from just 0% in 2022 to 51% in 2024.

All countries have increased BEV share since 2022.

BEV share is highest in Nordic and western European countries and lower in southern and eastern Europe.



Plug-in hybrid share is relatively stable with large changes in only a few countries



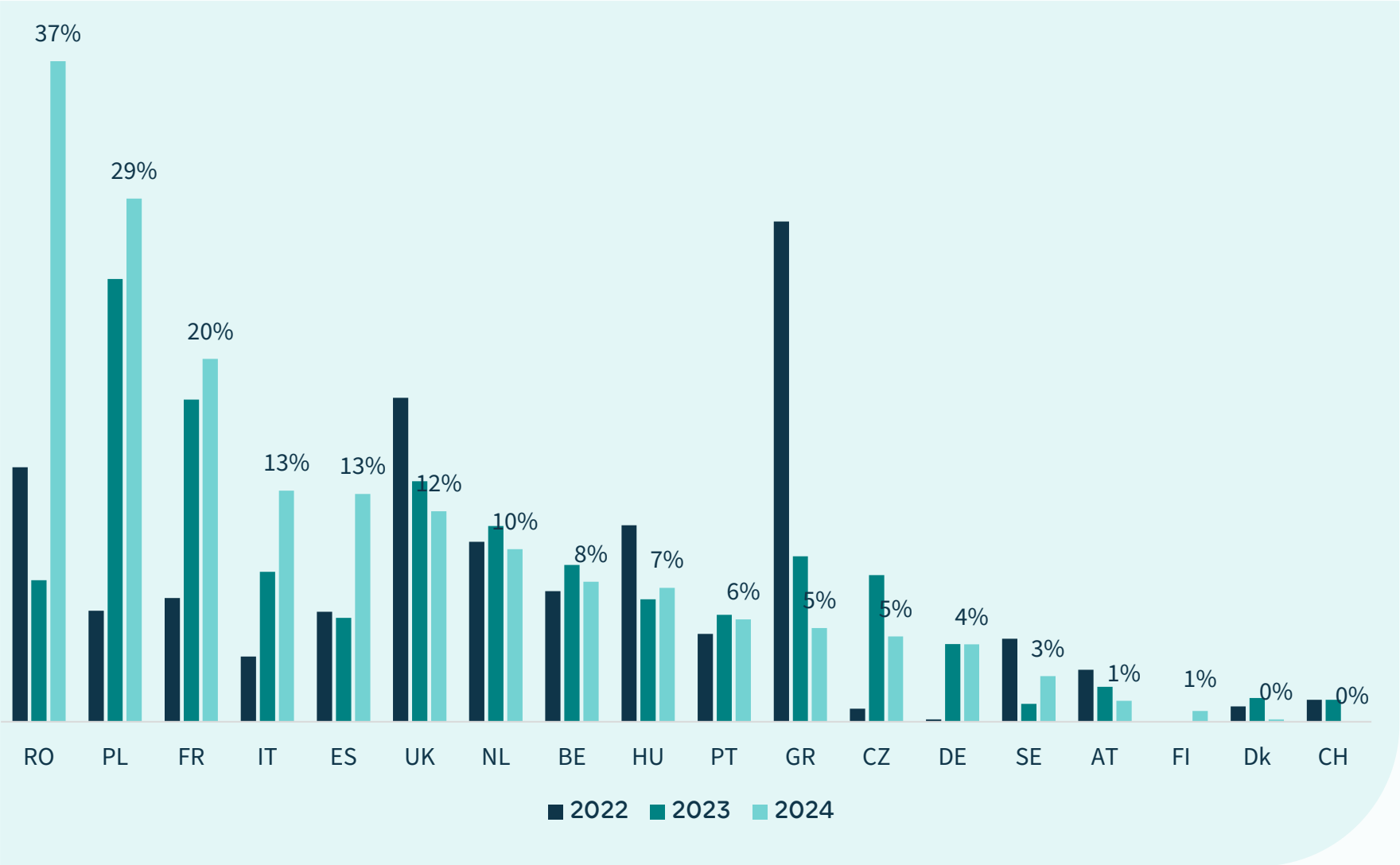
Several countries, such as Poland, Switzerland, and Czech Republic, maintain very low PHEV shares over the past three years, never exceeding 3%.

Sweden, Finland, and the United Kingdom consistently have the highest PHEV shares across all three years.

Industrial industry fleets in Denmark saw the largest decrease in the share of new PHEVs in fleet in 2024, going from 44% of new vehicles in 2022 to 9% in 2024.



Romania has the largest increase in hybrid shares in 2024 while Greece had a significant drop



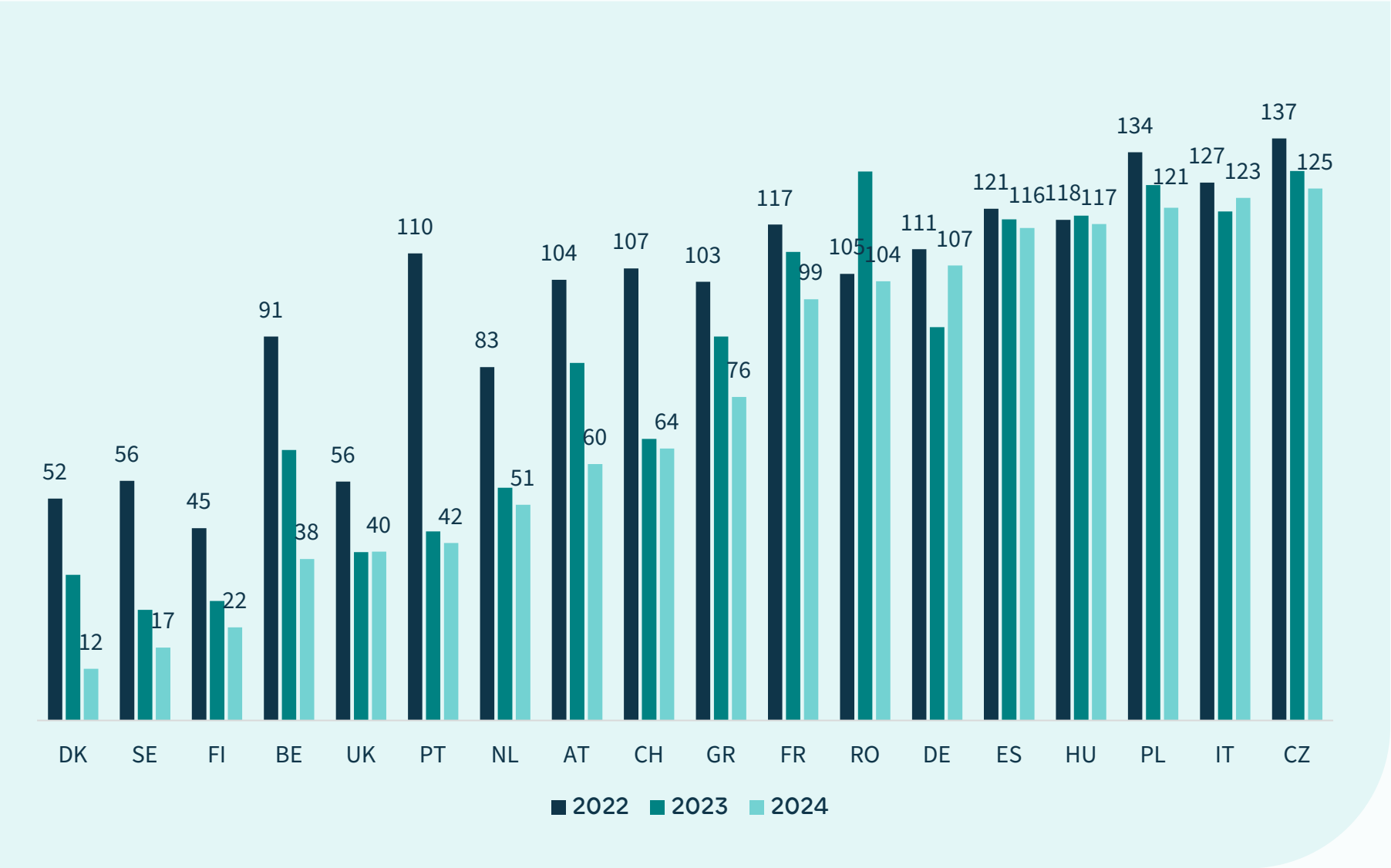
Romania and Poland saw the largest share increases in 2024, reaching 37% and 29%, respectively.

Greece experienced the most significant decrease, dropping from 28% in 2022 to just 5% in 2024.

Several countries, including Austria, Denmark, and Sweden, remained at low single-digit percentages throughout all three years.



Average emissions* have decreased across all countries since 2022 to an average of 70 g/km



Industrial industry fleets in Poland, Italy and the Czech Republic have the highest average emissions – over 120 g/km.

Northern European countries (Denmark, Sweden & Finland) have the lowest average CO₂ emissions.

*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

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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