

# Pharma industry benchmark

2025



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# Introduction

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

The following definition of the Pharmaceutical industry has been applied:

*Companies involved in developing, producing and distributing pharmaceutical products.*

This analysis of fleet trends is based on Ayvens' passenger car data from 64 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:



The share of diesel is decreasing significantly each year, but the share of petrol is in an upward trend.



The overall share of BEV has increased significantly for the pharmaceutical industry in the last two years, making it one of the best performing industries in terms of BEV share



71% of the countries have average CO<sub>2</sub> emissions\* under 100 g/km in pharma industry fleets

# The SUV-C2 segment is the most popular segment in pharmaceutical industry fleets in 2024

	2022	2023	2024
1 <sup>st</sup>	SUV-C2	SUV-D1	SUV-C2
2 <sup>nd</sup>	SUV-C1	SUV-C2	SUV-D1
3 <sup>rd</sup>	D2	D2	D2
4 <sup>th</sup>	SUV-D2	SUV-D2	SUV-D2
5 <sup>th</sup>	SUV-D1	SUV-C1	SUV-C1
6 <sup>th</sup>	D1	D1	D1
7 <sup>th</sup>	C1	C1	C1
8 <sup>th</sup>	C2	C2	C2
9 <sup>th</sup>	E2	E2	E2

Most popular car  
segment: SUV-C2



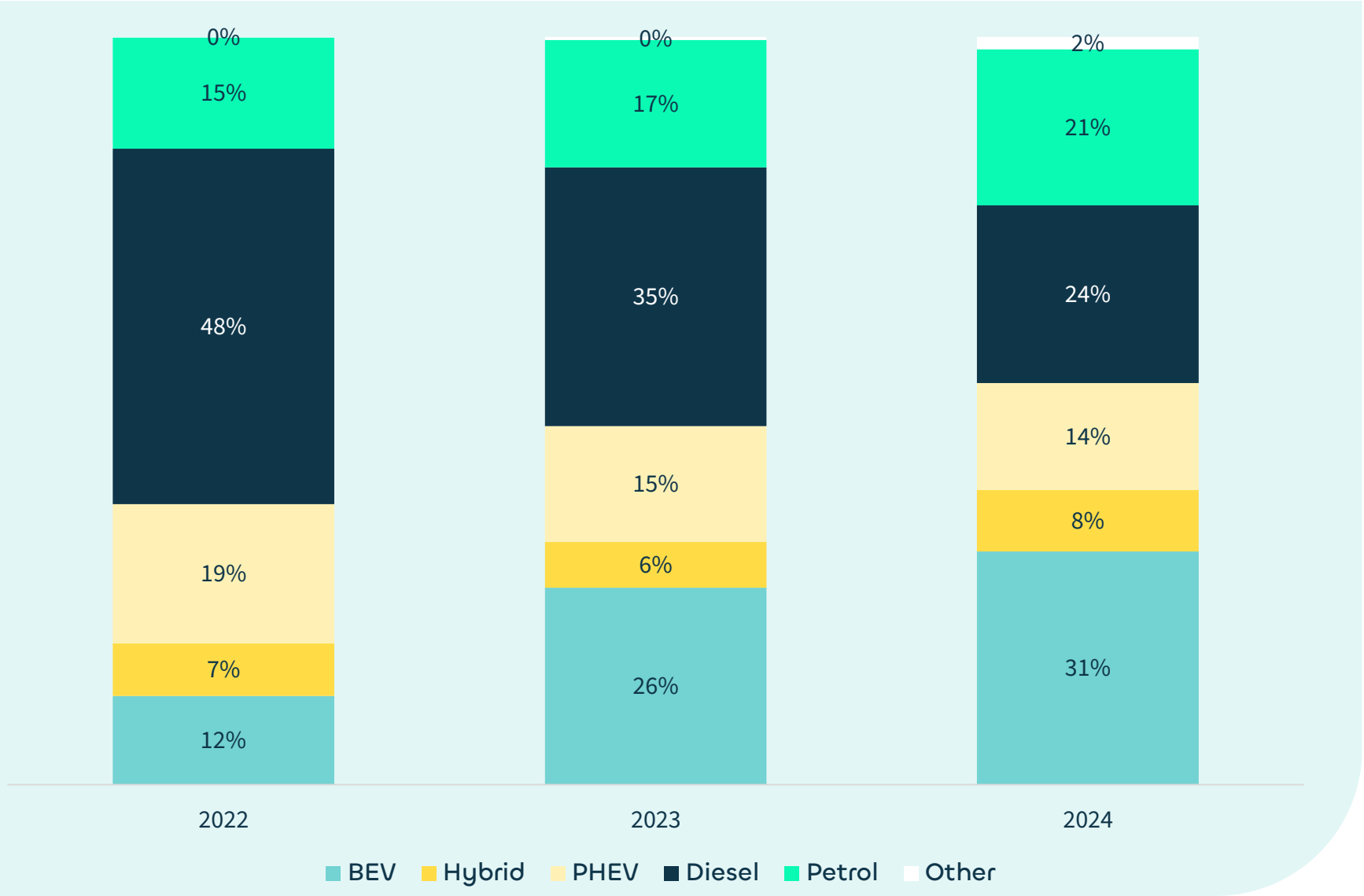
# BMW X1 is the most popular in 2024 in pharmaceutical industry fleets

	2022	2023	2024
	Vehicle	Vehicle	Vehicle
1 <sup>st</sup>	Peugeot 3008	Volkswagen ID.4	BMW X1
2 <sup>nd</sup>	BMW X1	Skoda Octavia	Tesla Model 3
3 <sup>rd</sup>	BMW 3 Series	Tesla Model Y	Tesla Model Y
4 <sup>th</sup>	Volkswagen Tiguan	BMW X1	Volkswagen Tiguan
5 <sup>th</sup>	Volkswagen Passat	Volkswagen Passat	Skoda Octavia
6 <sup>th</sup>	Toyota RAV4	Volkswagen Tiguan	Volkswagen Golf
7 <sup>th</sup>	Skoda Octavia	Peugeot 3008	Audi Q3
8 <sup>th</sup>	Mercedes-Benz CLA class	Toyota RAV4	BMW i4
9 <sup>th</sup>	BMW X3	Tesla Model 3	Skoda Enyaq

Most popular car:  
BMW X1



# BEV share continues to increase, while diesel share drops



The share of diesel is decreasing significantly each year while the share of petrol has increased slightly.

Plug-in hybrids (PHEV) have decreased slightly in share while hybrids have remained stable.

The largest increase has been in the share of battery electric vehicles in fleet, going from 12% of new vehicles in 2022 to 31% in 2024.



# Almost half of the countries have significantly reduced the share of new diesel cars in fleet since 2022



International pharmaceutical companies in the Netherlands had no new diesel cars in fleet in 2024.

Belgium, UK and Greece have less than 5% of new vehicles being diesel.

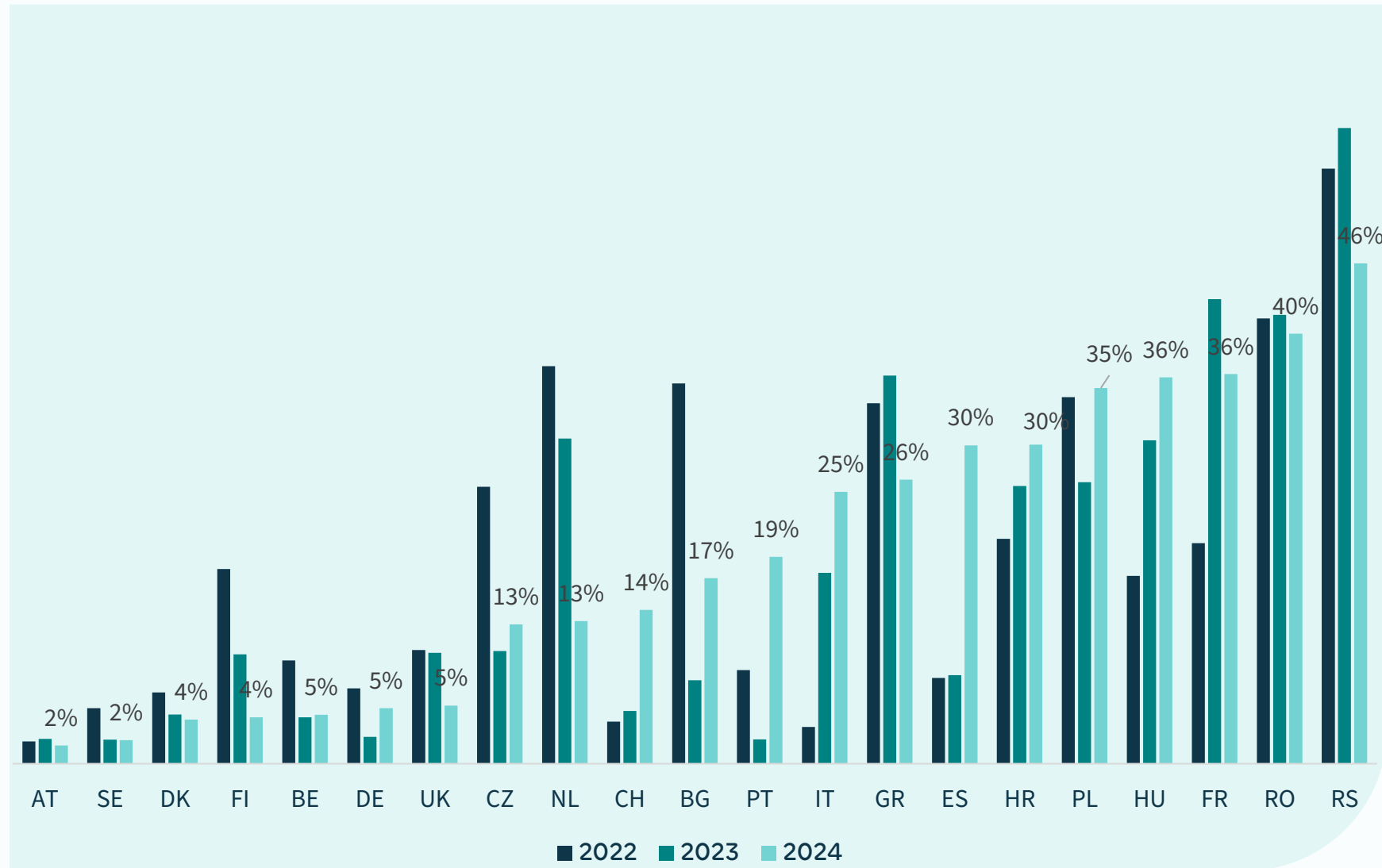
Denmark, Finland, France, Greece and United Kingdom have had a significant drop in diesel share from 2023 to 2024

Italy has seen the largest decrease in diesel vehicles in pharma industry fleets, going from 82% in 2022 to 28% in 2024.





# Austria, Germany and the Nordics have the lowest share of petrol vehicles in the industry



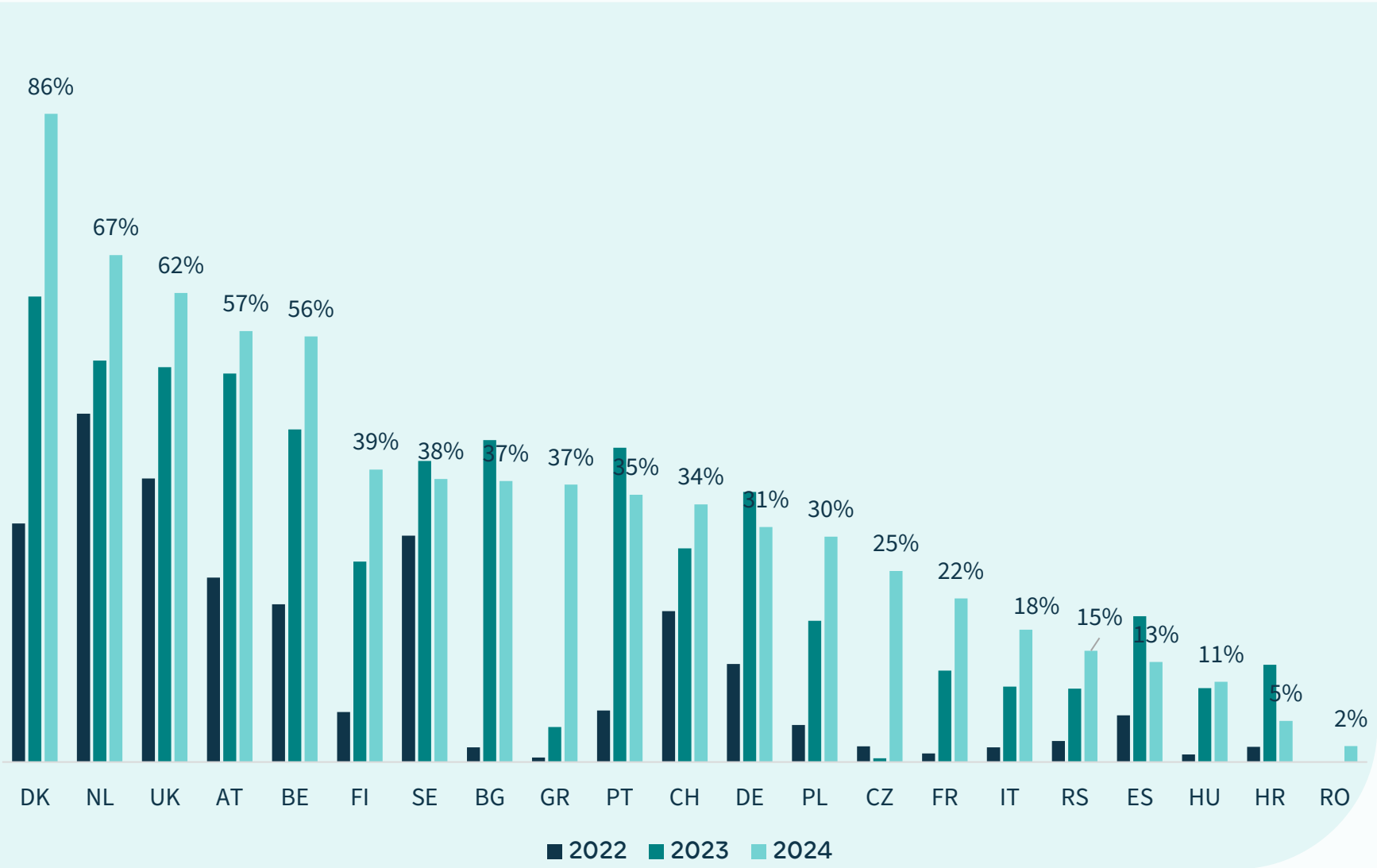
Serbia is still at the top with highest share of petrol cars in the pharmaceutical industry but dropped by 13 percentage points.

The Netherlands had the largest decrease in the share of new petrol vehicle in pharmaceutical fleets since 2022.

Some countries like, Switzerland, Portugal, Spain and Hungary have seen increases in the share of petrol vehicles since 2022.



# The share of battery electric vehicles has increased significantly in international pharmaceutical industry since 2022



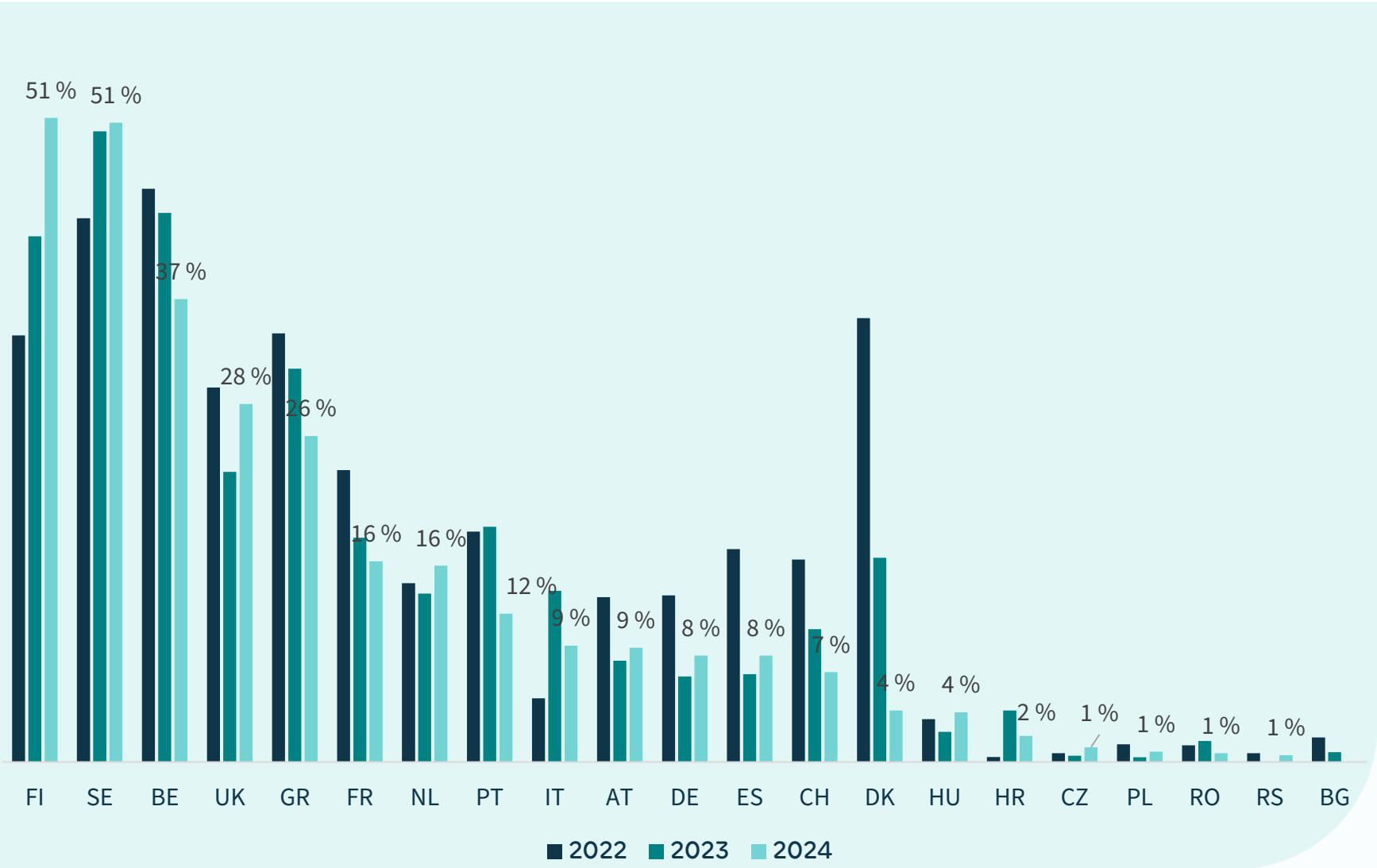
Denmark has the largest BEV share in the pharma industry, with the Netherlands and the United Kingdom following.

The most significant increase from 2023 to 2024 was in Greece going from 1% to 37%.

All countries have increased the share of battery electric vehicles over the past three years.



# Plug-in hybrid vehicles are more popular in Nordic and Western European countries compared to Eastern Europe.



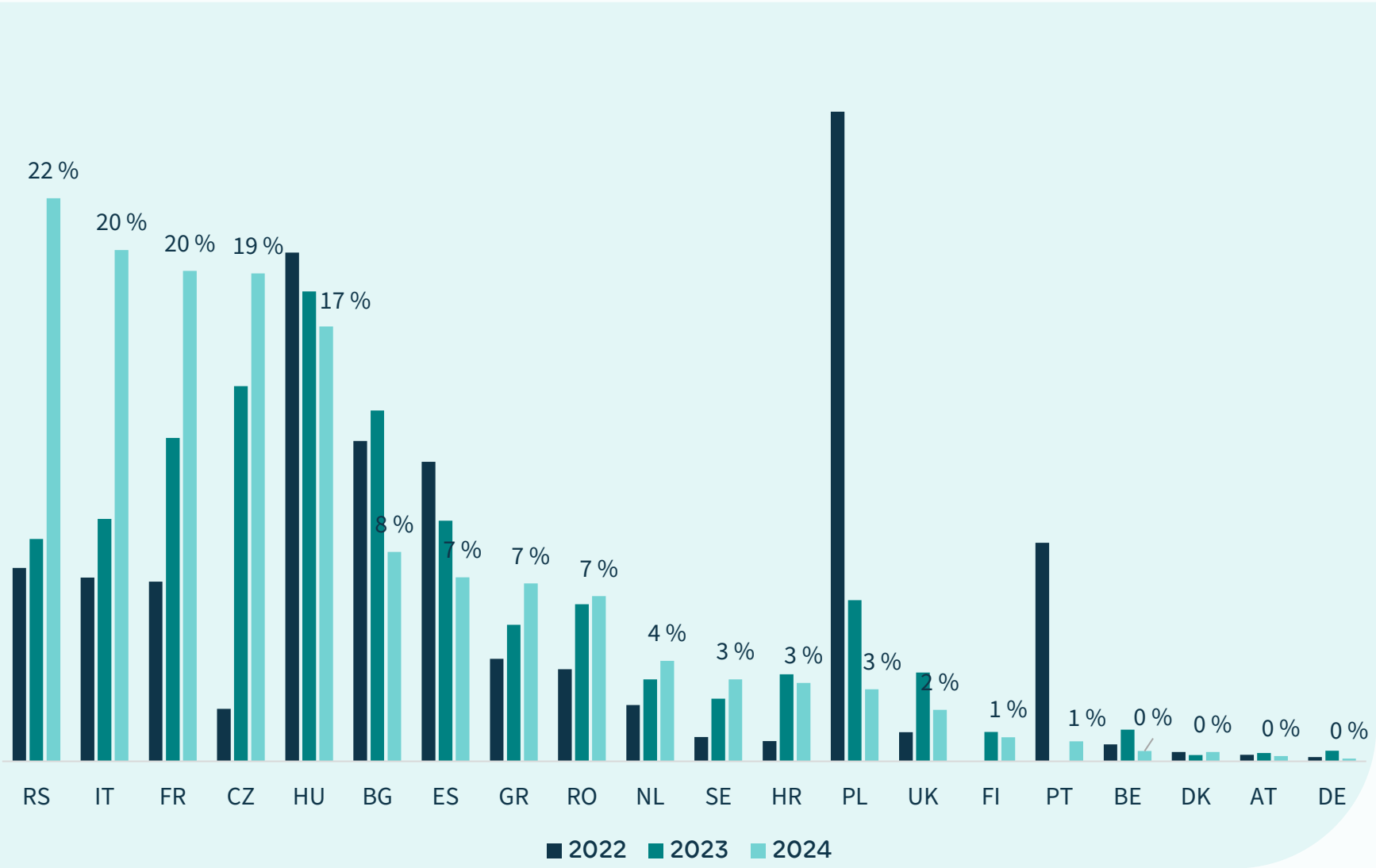
Pharma industry fleets in Finland and Sweden have the highest share of PHEVs.

The share of PHEVs in Denmark has significantly decreased in the last three years going against the trend seen in Finland and Sweden.

The share of PHEVs have almost halved in Italian pharma fleets compared to 2023.



# The share of hybrid cars in pharmaceutical industry fleets decreased significantly for more than half of the countries

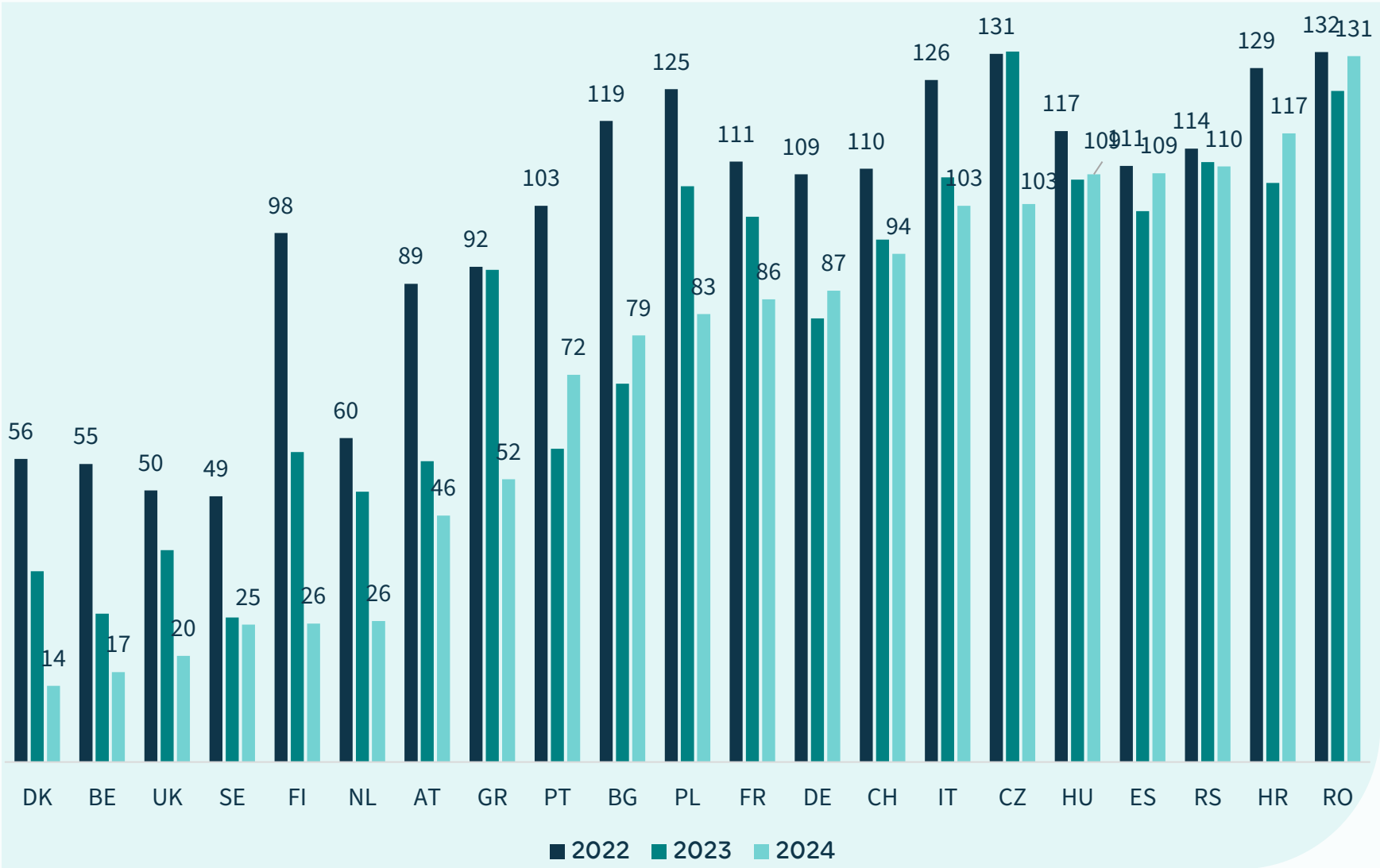


Serbia has the highest share of hybrid vehicles when compared to the other countries, with a significant jump from 2023 to 2024 , potentially explaining the decrease in diesel and petrol cars in the fleets.

Austria, Belgium, Croatia, Denmark, Finland, Germany and The Netherlands continue to have low shares of hybrid vehicles in their pharma fleets



# 66% of the countries have average CO<sub>2</sub> emissions\* under 100 g/km in pharma industry fleets



Denmark’s heavy shift from petrol and diesel cars to BEVs brings it at the top of the list with the lowest average CO<sub>2</sub> emissions in pharma industry fleets at 14 g/km.

Poland has made great progress in decreasing CO<sub>2</sub> in the industry in the last couple of years, expanding their BEV share in their fleets.

Denmark, Belgium, UK, Sweden, Finland and Netherlands all have average CO<sub>2</sub> emissions below 30 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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