

Technology industry benchmark

2025



Better with every move.

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Introduction

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

The following definition of the technology industry has been applied:

Companies primarily involved in the development of hardware or software products.

This analysis of fleet trends is based on Ayvens' passenger car data from 44 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, there has been a shift away from diesel cars toward battery electric vehicles in international technology industry fleets. However, the changes across all powertrains are more pronounced when examined at the country level.



Average CO₂ emissions in technology industry fleets are decreasing, dropping from 93 g/km in 2022 to 66 g/km in 2024. This reduction is mainly driven by significant decreases in a few countries (Austria, Belgium, and the Netherlands).



Among the 12 countries included in the benchmark, six have average emissions above 66 g/km. The average emissions for the six highest-polluting countries is 97 g/km, while the average for the six lowest-polluting countries is 39 g/km.

Most popular segment

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

Most popular car
segment: SUV-D2



Most popular car

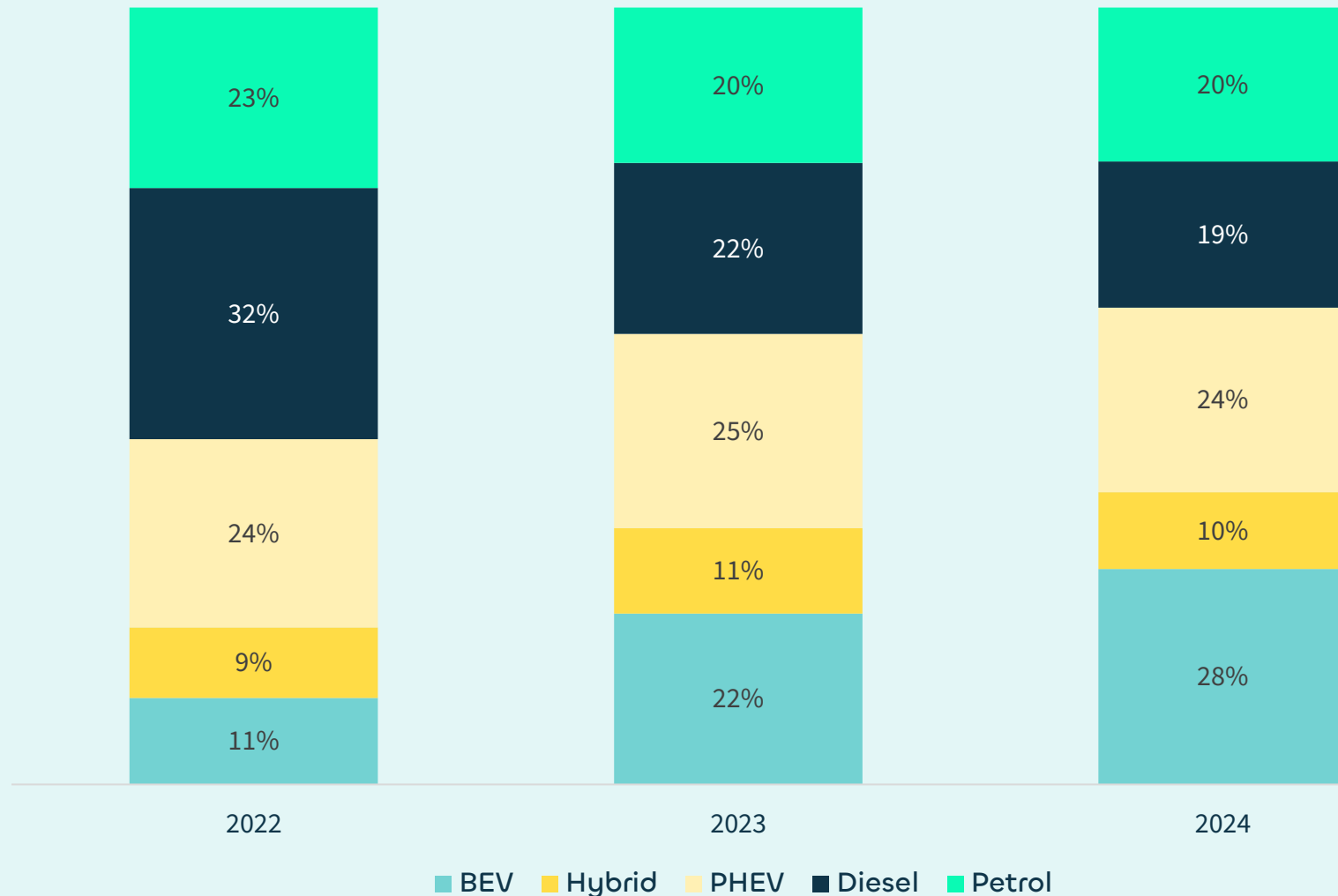
	2022	2023	2024
1 st	Mercedes-Benz GLC class	Tesla Model Y	BMW X1
2 nd	Renault Megane	Skoda Octavia	Skoda Octavia
3 rd	Mercedes-Benz A Class	Mercedes-Benz C Class	Mercedes-Benz GLC Class
4 th	Volkswagen Tiguan	Renault Megane	Tesla Model Y
5 th	Toyota Yaris	Volkswagen Tiguan	Peugeot 308
6 th	Volkswagen Golf	Volvo XC40	Volkswagen Golf
7 th	BMW 3 series	BMW X1	Tesla Model 3
8 th	BMW X1	Toyota Yaris	Volkswagen Tiguan
9 th	Skoda Octavia	Mercedes-Benz GLC class	Toyota Corolla

Most popular car:
BMW X1



The share of diesel cars in technology industry fleets is declining, while the share of battery electric vehicles is increasing

Trends in powertrains

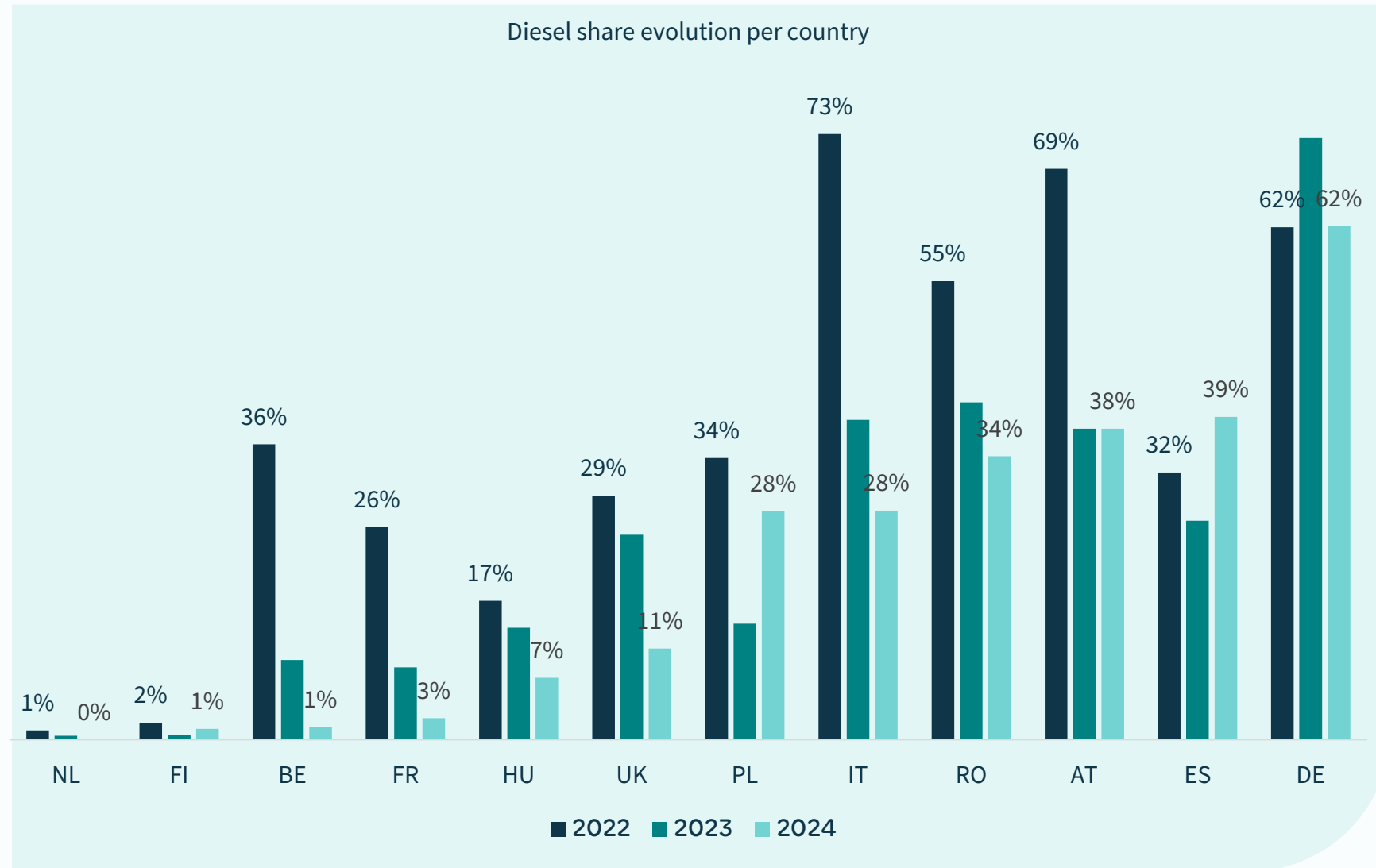


The major changes in powertrains are primarily in the shares of battery electric vehicles (BEVs) and diesel cars.

The shares of hybrid, plug-in hybrid (PHEV), and petrol cars have remained stable since 2022, with only minor changes.



All countries, except Spain and Germany, have seen large decrease in the share of new diesel cars in fleet

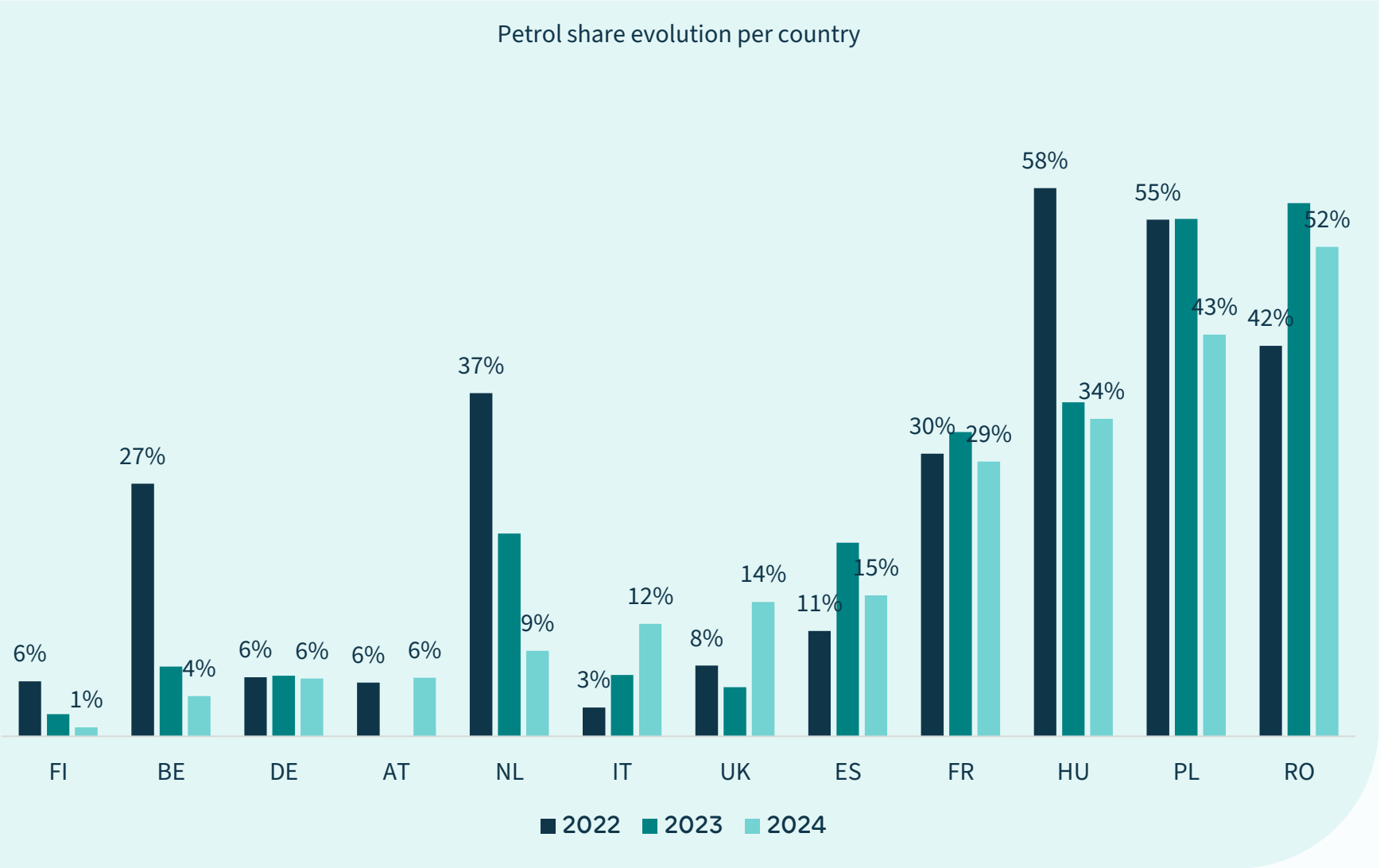


Belgium and France have experienced the largest decreases in new diesel cars over the past three years, with Belgium's share dropping from 36% in 2022 to 1% in 2024.

Spain is the only country where the share of diesel cars in technology industry fleets increased in 2024 compared to 2022.



Most countries have seen a decline in petrol car shares within technology industry fleets

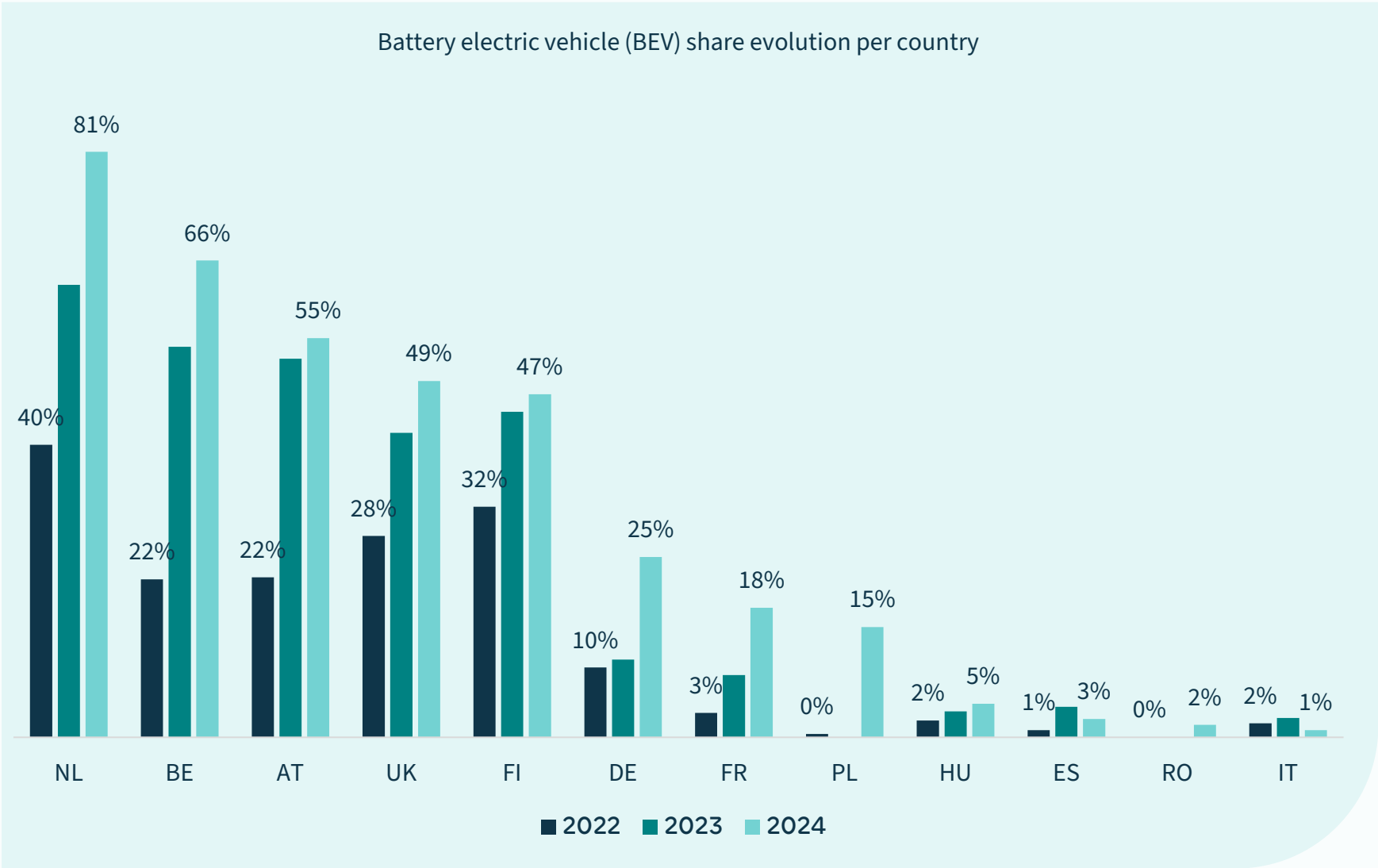


Romania, Spain, the UK, and Italy have all seen increases in the share of new petrol cars since 2022, contrary to the general trend in other countries.

The largest decreases in petrol vehicles are observed in Belgium, the Netherlands, and Hungary.



Technology industry fleets in the Netherlands are leading the way in battery electric vehicle (BEV) adoption



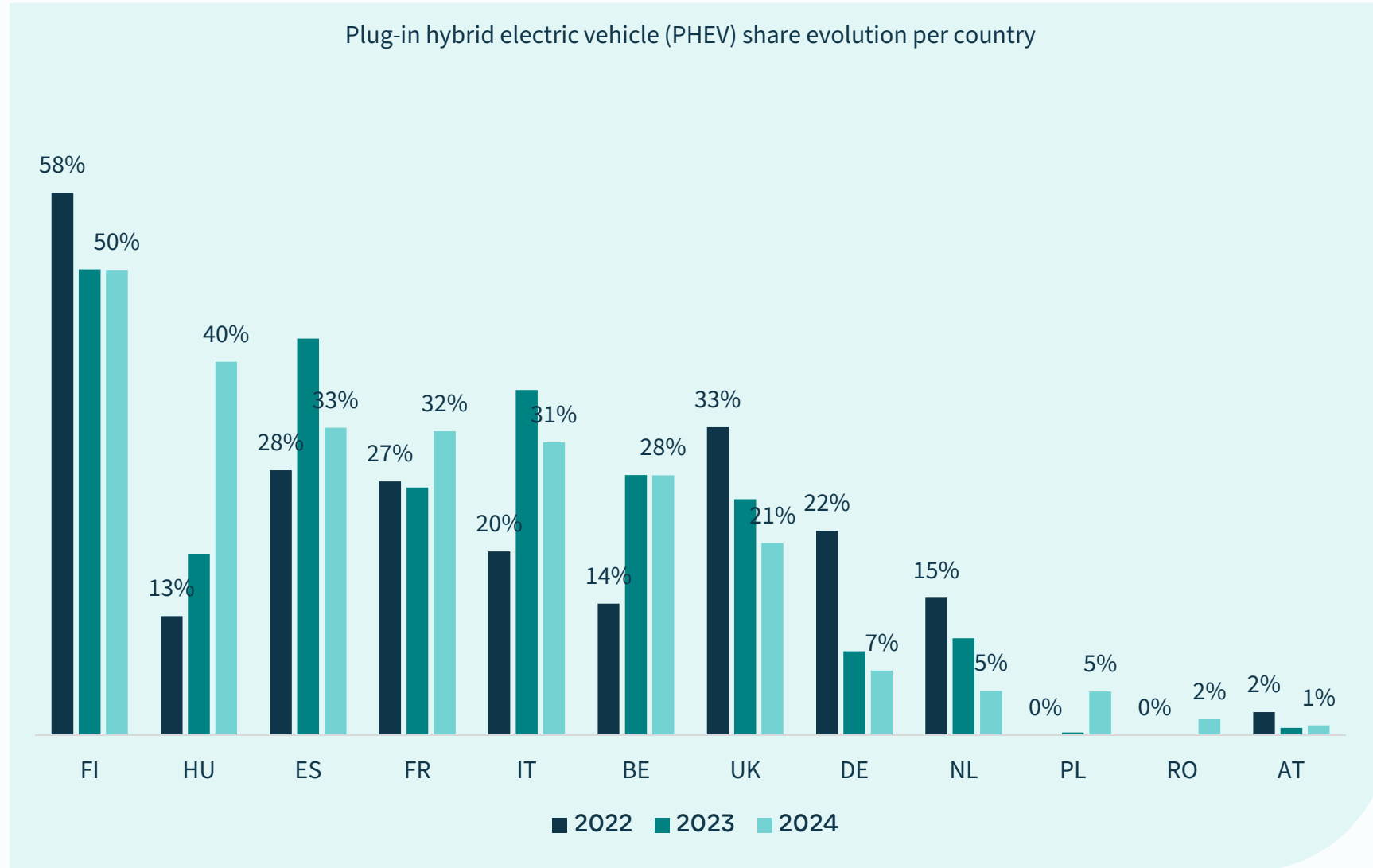
Almost all countries have experienced large increases in the share of BEVs over the past three years.

Spain, Romania, and Italy have notably low shares of BEVs compared to other countries.

Spain and Italy saw slight decreases in the share of BEVs delivered in 2024 compared to 2023.



Overall, the share of plug-in hybrids (PHEVs) has remained fairly stable across all countries, with a few exceptions.

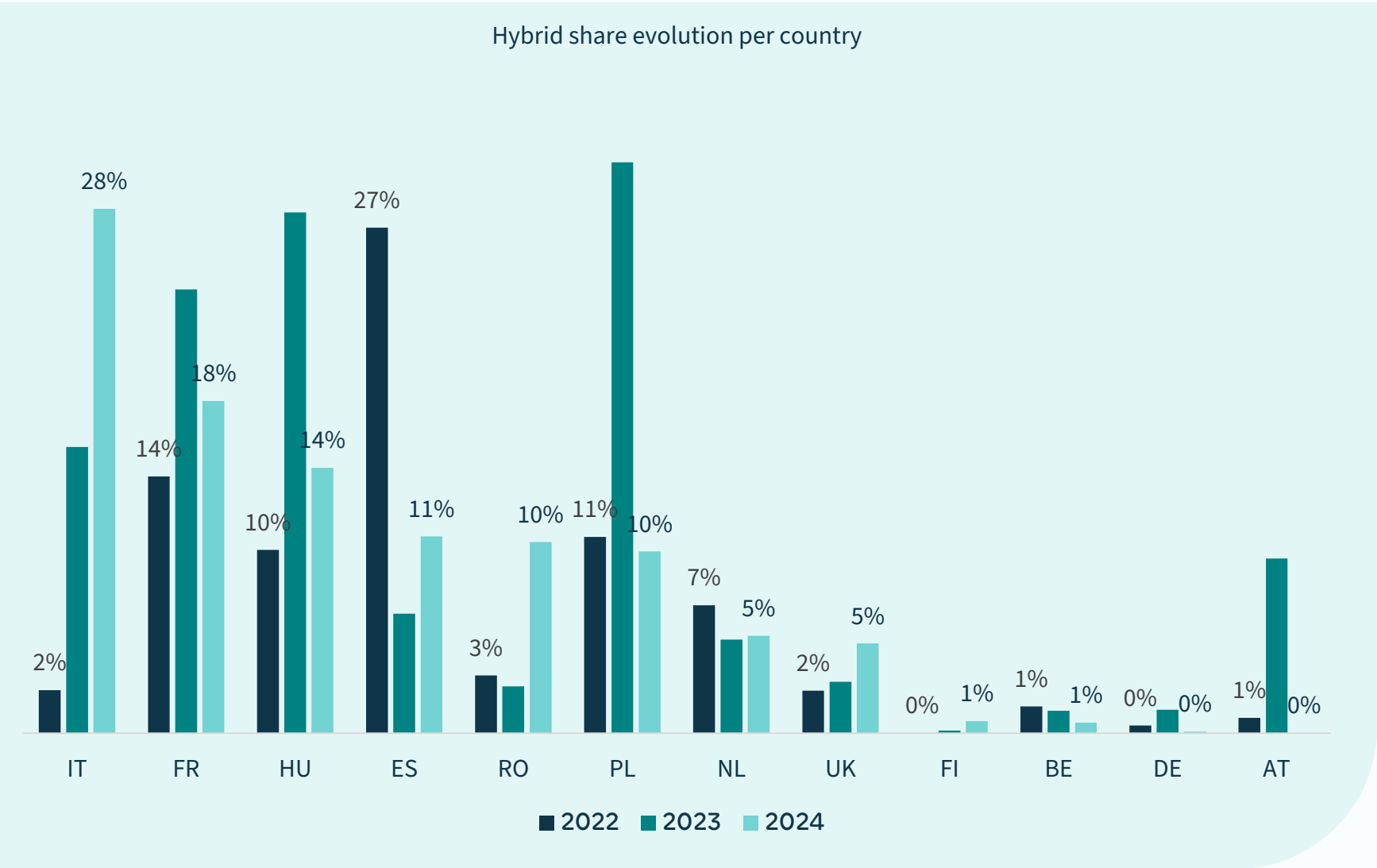


Significant increases in PHEV shares are seen only in Hungary, Belgium, and Poland, where the share has doubled since 2022.

The shares of PHEVs in the UK, Germany, and the Netherlands have declined since 2022, possibly due to the end of purchase incentives (Germany) or the removal of vehicle excise duty discounts (UK).



The share of new hybrid cars in fleets varies greatly by country.

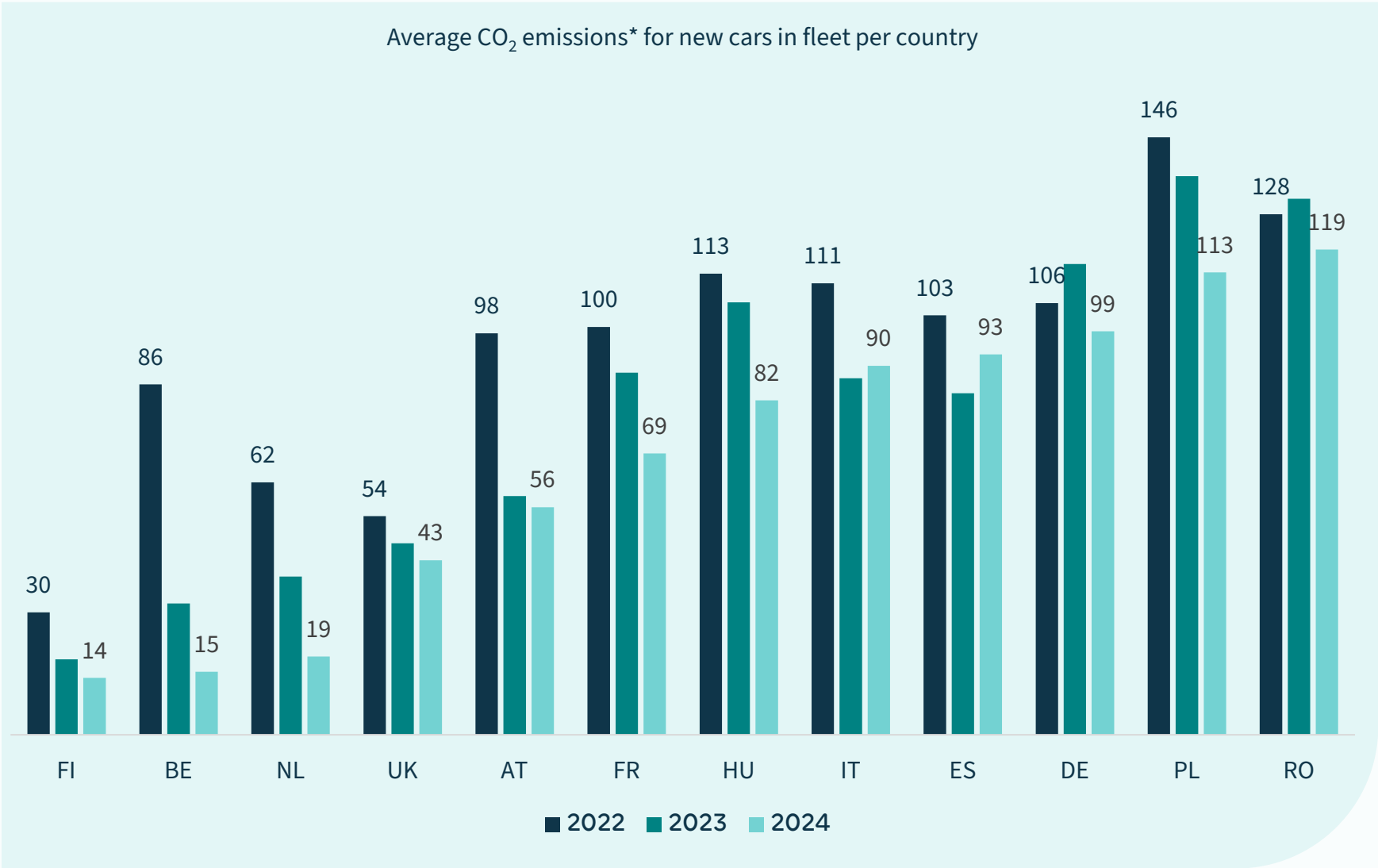


Italy’s technology industry fleets have seen the largest increase in hybrid vehicles since 2022, rising from 2% to 28% of new cars in 2024.

In 2023, hybrid car shares increased in Austria, Hungary, and Poland, but levels dropped back in 2024.



Average emissions* for new cars in international technology industry fleets have decreased by 29% since 2022



Emissions have fallen across all countries since 2022.

Finland, Belgium, and the Netherlands have average CO₂ emissions below 20 g/km for new cars in 2024, driven by high BEV adoption and very low diesel shares (1% or less).



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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