Consumer Goods industry benchmark

2024

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Contents

Introduction

In this Consumer Goods industry benchmark report, the most important fleet trends for Consumer Good industry fleets in Europe are highlighted, by comparing the passenger car registrations between 2021 and 2023.

The following definition of the Consumer Goods industry has been applied:
Companies developing or selling consumer products (FMCGs, retailers, etc)

This analysis of fleet trends is based on Ayvens' passenger car data from 166 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 (2021, 2022 and 2023).

If you would like to know how sustainable this industry compared to other industries please check out our Sustainable Industry Fleet Ranking 2024.

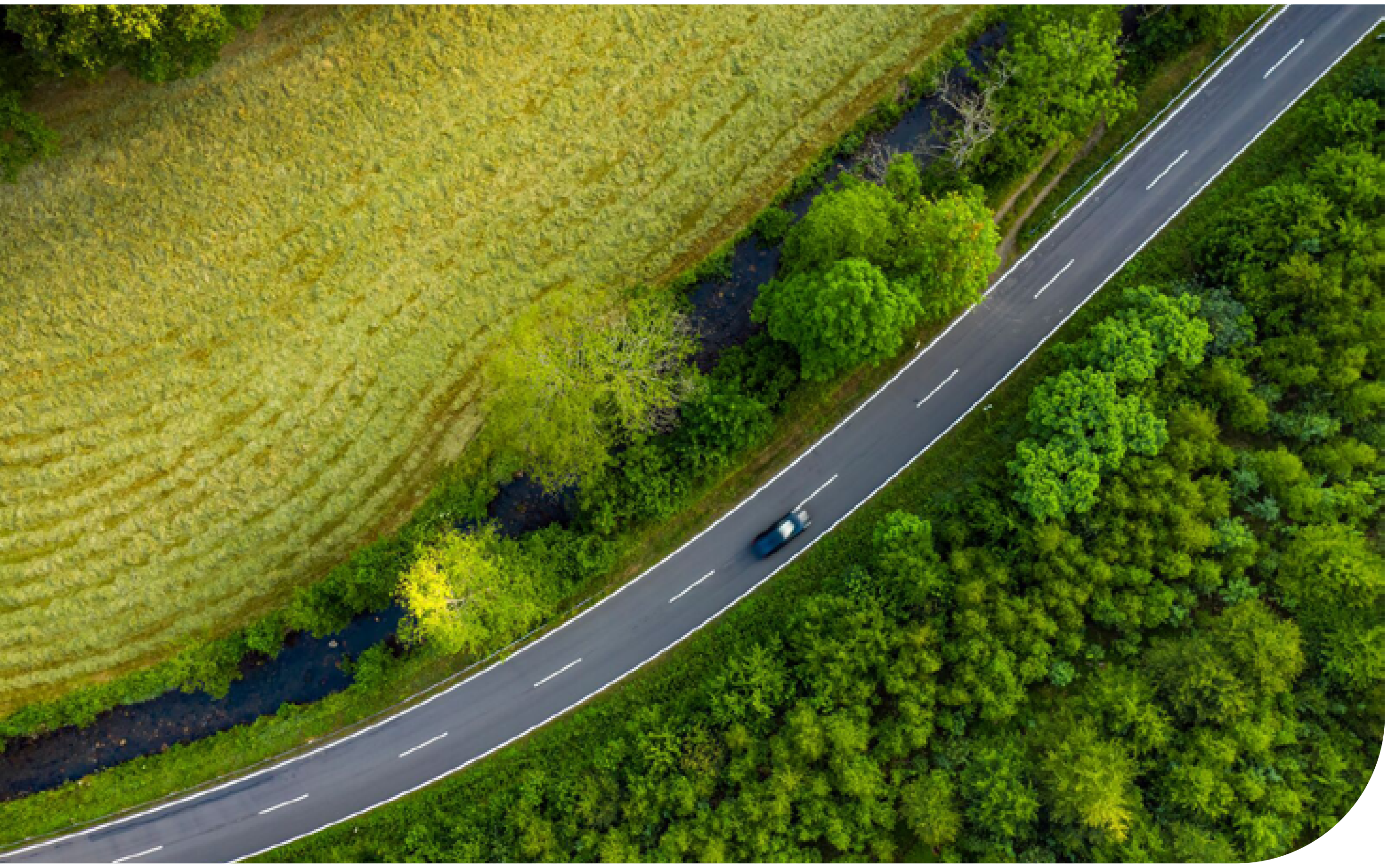
Results 2023

Key insights

The C1 keeps its top spot as the most popular vehicle segment for the third year in a row and the top car is a Toyota Corolla, which is in the C1 segment.

When it comes to the adoption of battery electric vehicles (BEVs) in fleet, there is a clear divide between northern & western European countries and southern & eastern European countries. There is a much higher uptake of BEVs in northern and western Europe while PHEVs and hybrids are more popular in southern & eastern European countries.

The share of diesel and petrol vehicles has been gradually declining. In 2021, diesel and petrol vehicles share in Austria was 79% but this dropped to 53% by 2023. A similar trend was observed in most countries.



The C1 segment is the most popular car segment for the third year in a row

Most driven car segments

	2021		2022		2023	
	Segment	%	Segment	%	Segment	%
1st	C1	20%	C1	23%	C1	24%
2nd	SUV-D1	14%	SUV-D1	14%	SUV-D1	21%
3rd	SUV-C1	13%	SUV-C1	10%	SUV-C1	10%
4th	D1	11%	D1	10%	SUV-C2	7%
5th	D2	8%	D2	8%	D2	6%
6th	SUV-C2	7%	B1	7%	SUV-D2	6%
7th	SUV-D2	6%	SUV-C2	5%	SUV-B1	5%
8th	SUV-B1	4%	SUV-D2	5%	D1	5%
9th	B1	4%	SUV-B1	4%	B1	4%
10th	E2	3%	E2	3%	C2	3%
11th	C2	3%	C2	3%	MPV-C	2%

Most popular segment: C1

- The popularity of SUVs are only increasing, with half of the most popular vehicle segments being SUVs in 2023.
- Only 4 out of the 10 segments are premium vehicle segments, with the majority of the vehicles being in a volume (not premium) segment. This is consistent with previous years.
- The E2 segment has dropped out of the top 10 most popular segments after spending the last 2 years in second last place.

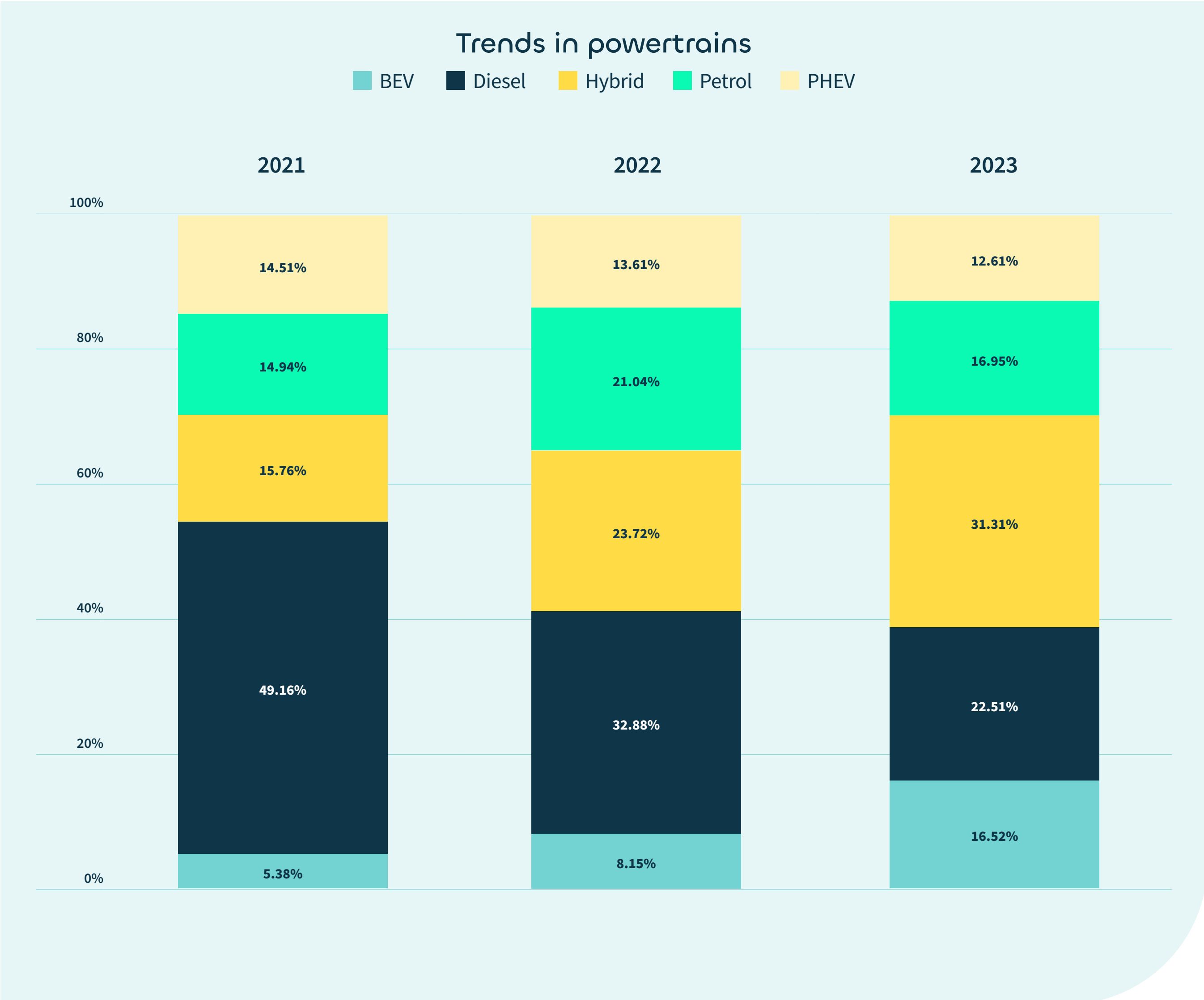
The Toyota Corolla is the most popular vehicle for the third year in a row

	2021 Make & Model	2022 Make & Model	2023 Make & Model
1st	Toyota Corolla	Toyota Corolla	Toyota Corolla
2nd	Peugeot 3008	Volkswagen Passat	Renault Arkana
3rd	Volkswagen Passat	Peugeot 3008	Ford Kuga
4th	Skoda Octavia	BMW3 Series	Toyota RAV4
5th	Peugeot 5008	Skoda Octavia	Renault Megane
6th	BMW3 Series	Ford Kuga	Skoda Octavia
7th	Peugeot 2008	Toyota Yaris	Peugeot 3008
8th	Skoda Superb	Ford Mondeo	Peugeot 2008
9th	BMW Xi	BMW5 Series	Volkswagen ID.4
10th	Toyota RAV4	Toyota C-HR	Volkswagen Golf

Most popular car: Toyota Corolla

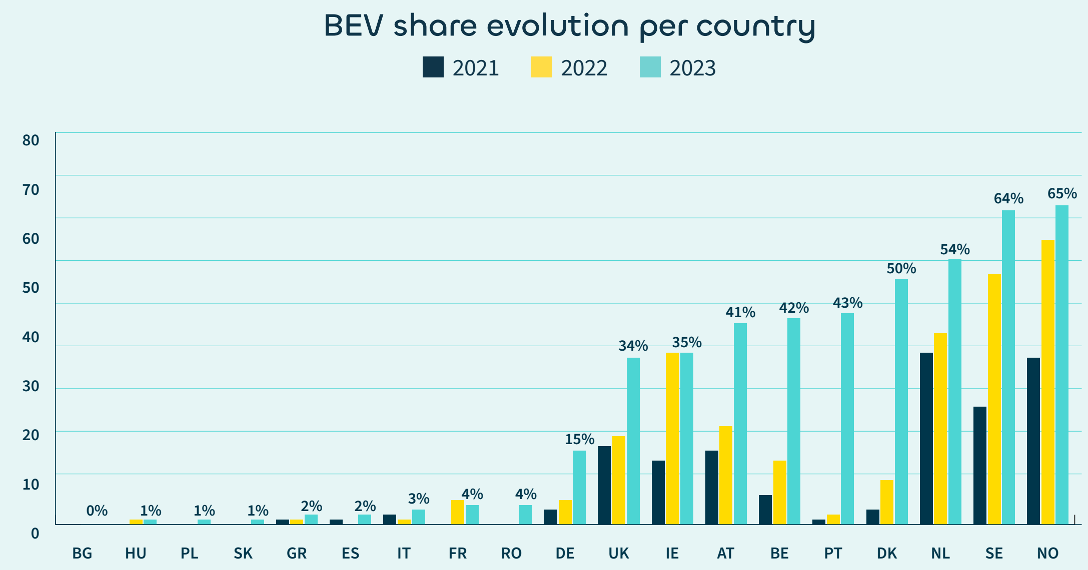
- The Toyota Corolla is the most popular vehicle model, followed by the Renault Arkana, which has taken the second-place position in 2023.
- In 2023, BMW has dropped out of the top 10 most popular brands while the Volkswagen Golf and ID.4 have increased in popularity.

Diesel car powertrains have decreased in fleet share by 26 percentage points since 2021



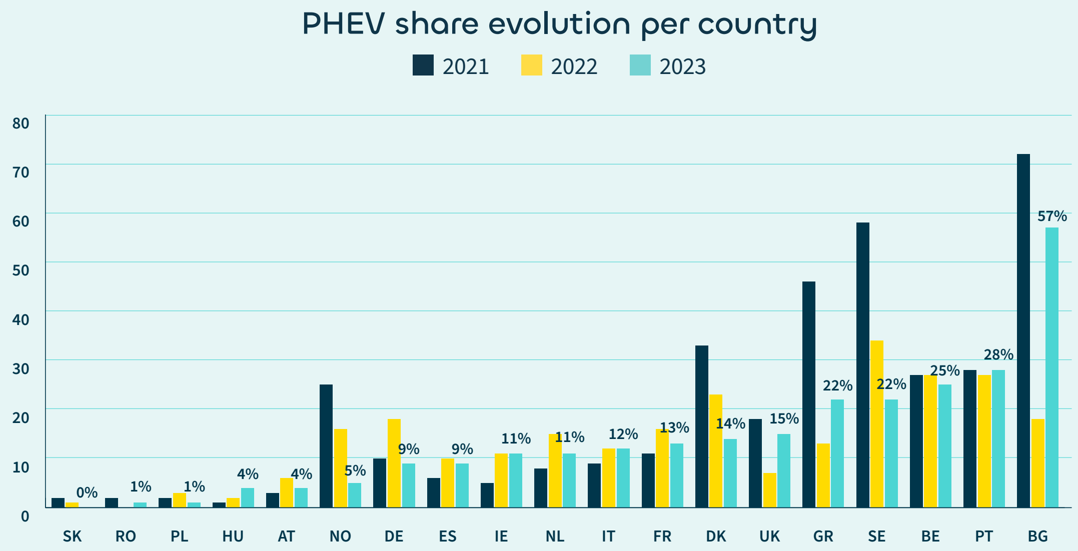
- Share of plug-in hybrid electric vehicles (PHEVs) and petrol cars have remained stable
- Largest increases are in the share of hybrids in fleet, going from 16% in 2021 to 31% in 2023.
- The share of battery electric vehicles (BEV) in fleet has also increased over the past two years but at lower rate than hybrids.

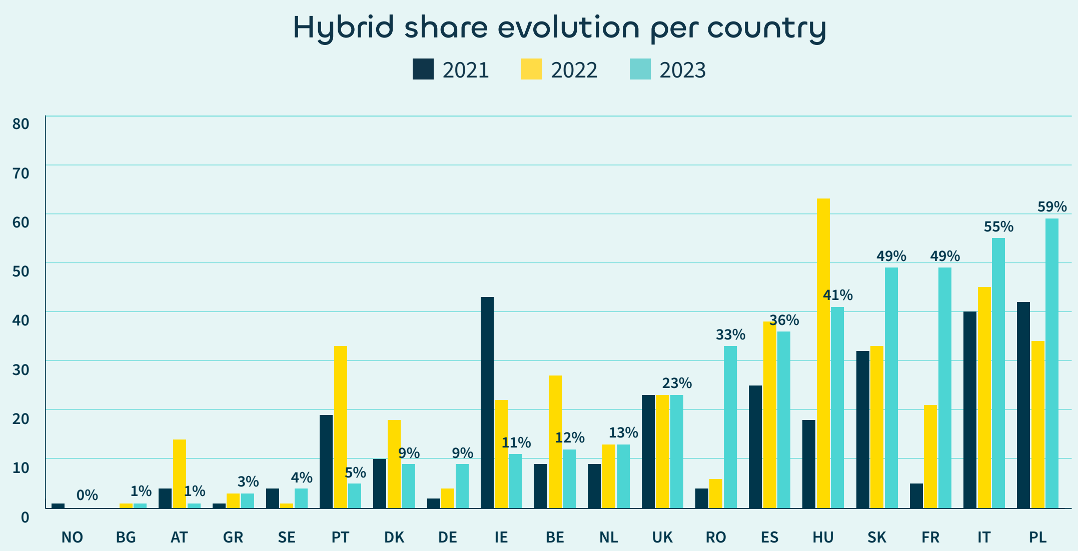
From 2022 to 2023, the share of battery electric vehicles in consumer good industry fleets has seen double digit growth in multiple countries



- The Nordic countries are still leading the way in battery electric vehicle adoption with Norway, Sweden and Denmark all now having a BEV share above 50%
- Large growth in BEV share has been seen in the past year in Austria, Belgium, Denmark and Portugal.

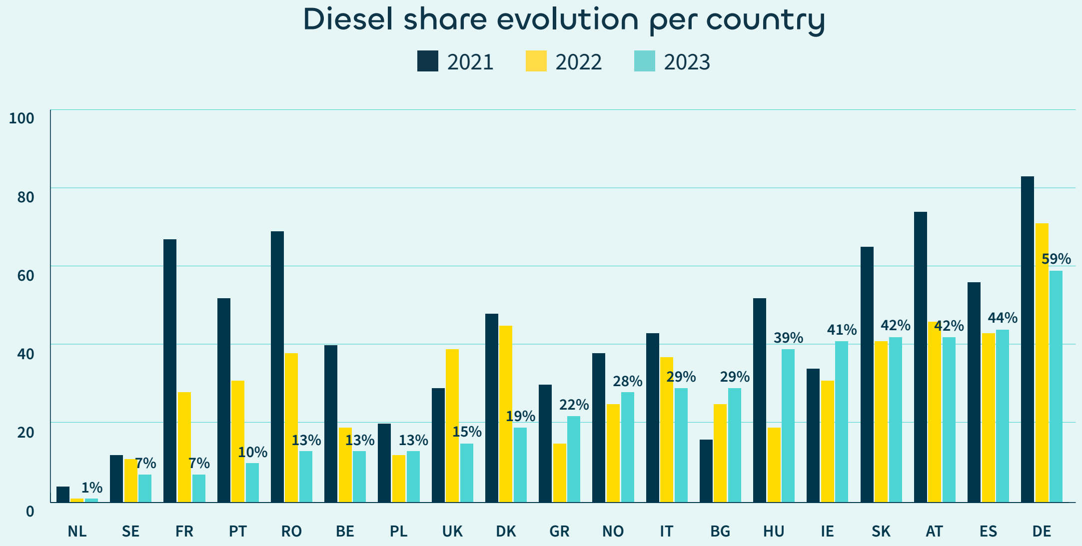
Share of PHEVs is stable or declining in most countries

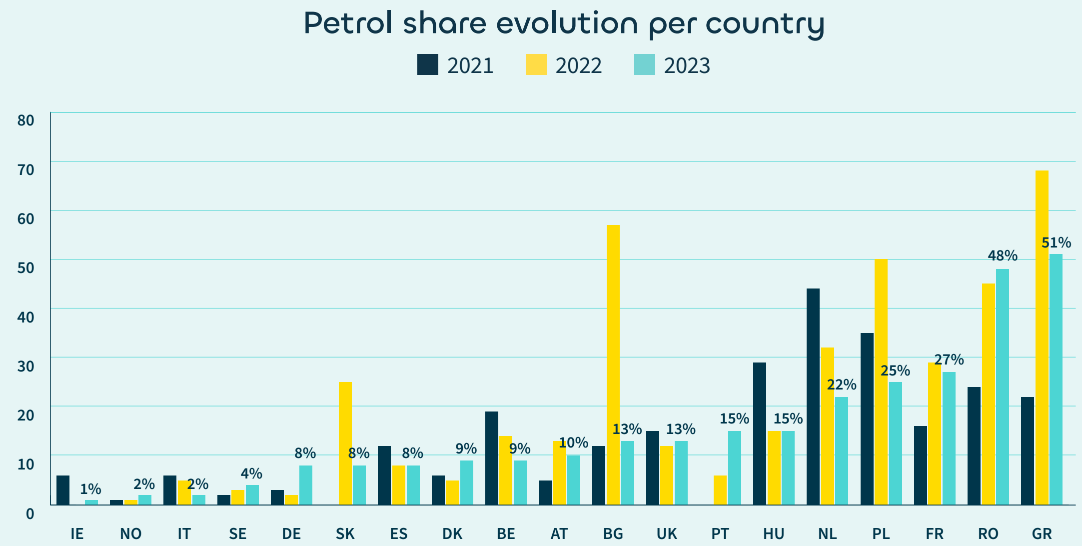




- Bulgaria has by far the largest share of PHEVs in fleet at 57% in 2023 while Poland has a PHEV share of around 1% but the highest hybrid share at 59%.
- Sweden saw a large decrease (almost 40 percentage points) in the share of PHEVs in fleet.
- Overall, the share of hybrids have increased over the past year while the share of PHEVs have slightly decreased or remained steady in most countries.

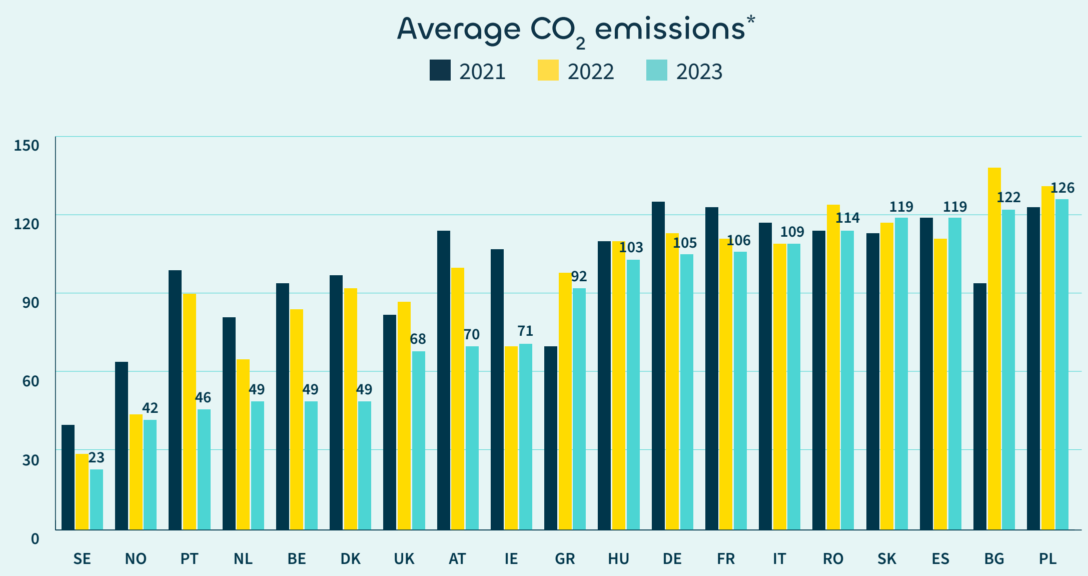
Share of diesel and petrol cars in consumer good industry fleets are continuing to decline in most countries





- While the overall trend is a decline in petrol and diesel vehicles, there have been increases in 2023, in a few countries like Bulgaria and Romania.
- Germany is the only country with an over 50% share of diesel cars.
- Bulgaria has seen the largest decrease in petrol cars over the past year, going from close to 60% in 2022 to 13% in 2023.

With an average of 23 g/km, Swedish consumer good industry fleets have the lowest average CO_2 emissions



- Northern and western European countries have seen a decrease in average CO_2 emissions due to the move from petrol and diesel powertrains to primarily battery electric vehicles.

- Most southern and eastern European countries have seen a slight increase or a stabilisation in average CO_2 emissions over the past year.

*Emissions are based on OEM estimates and not real-world emissions

Appendix A: Segmentation – Overview

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'

	Volume cars (1)			Premium cars (2)	
	Hatchback / sedan / SW	**SUV**	**MPV**	**Hatchback / sedan / SW**	**SUV**
Subcompact cars (B)	 B1 – VW Polo	 SUV-B1 – VW T-Cross	Not common	 B2 – Mini Cooper	Not common
Compact cars (C)	 C1 – VW Golf	 SUV-C1 – VW T-Roc	 MPV-C – VW Touran	 C2 – BMW 1 series	 SUV-C2 – BMW X1
Midsized cars (D)	 D1 – VW Passat	 SUV-D1 – VW Tiguan	 MPV-D – VW Sharan	 D2 – BMW 3 series	 SUV-D2 – BMW X3
Full-size cars (E)				 E2 – BMW 5 series	 SUV-E2 – BMW X5

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