

Industrial industry benchmark

2024



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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 2021 and 2023.

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 266 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](#).

A large, abstract graphic composed of two teal-colored shapes. The shape on the left is a curved, wedge-like form that tapers towards the bottom left. The shape on the right is a vertical, trapezoidal form that tapers towards the bottom right. Both shapes are filled with a solid teal color and are set against a dark blue background.

Results 2023

Key insights



The industrial industry is one of the average performing industries when it comes to sustainability. Scoring poor on the share of diesel cars in fleet and average on share of battery electric vehicles, share of PHEVs & hybrids and lowest average CO₂ emissions. This has led the industry to its 7th place position in the Fleet Sustainability Ranking by Industry report.



Six countries (Finland, Norway, Sweden, UK, Denmark, Belgium & the Netherlands) have average CO₂ emissions below 50 g/km, which has been primarily driven by the high share of battery electric vehicles in industrial industry fleets in those countries.



Skoda and Volkswagen are the most popular car brands in industrial industry fleets with VW having 4 car models in the top 10 and Skoda having 3.



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

	2021		2022		2023	
	Segment	%	Segment	%	Segment	%
1 st	C1	17%	C1	18%	C1	21%
2 nd	D1	14%	SUV-D1	15%	SUV-D1	18%
3 rd	D2	13%	D2	11%	SUV-D2	11%
4 th	SUV-D1	12%	D1	11%	D2	10%
5 th	SUV-C1	8%	SUV-C1	8%	SUV-C2	8%
6 th	SUV-D2	7%	SUV-D2	7%	SUV-C1	8%
7 th	SUV-C2	6%	SUV-C2	6%	D1	7%
8 th	B1	4%	B1	5%	B1	4%
9 th	E2	4%	E2	4%	C2	2%
10 th	C2	3%	C2	3%	E2	2%

Most popular segment: C1

- The distribution of car segments is more consolidated in industrial industry fleets with 50% of cars leased in 2023 being in the top 3 segments.
- While there are some premium car segments in the top 10, these are far less popular than non premium car segments

The Skoda Octavia has taken the top spot as the most popular car in industrial industry fleets in 2023

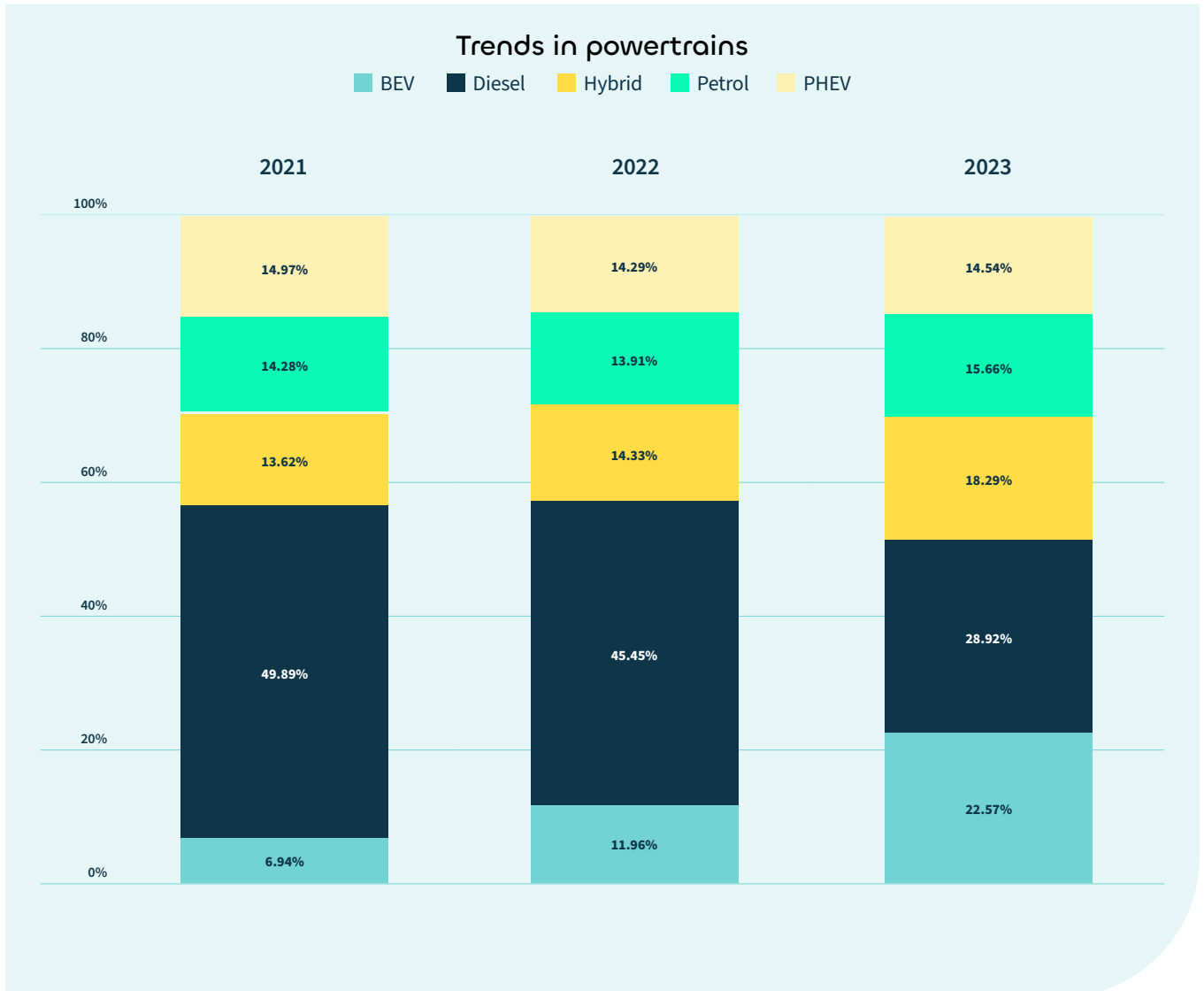
	2021 Make & Model	2022 Make & Model	2023 Make & Model
1 st	Volkswagen Passat	Volkswagen Passat	Skoda Octavia
2 nd	Skoda Octavia	Skoda Octavia	Tesla Model Y
3 rd	BMW3 Series	Peugeot 3008	Skoda Enyaq
4 th	Skoda Superb	BMW3 Series	Volkswagen Passat
5 th	Peugeot 3008	Skoda Superb	Toyota Corolla
6 th	Ford Mondeo	Seat Leon	Volkswagen Tigun
7 th	Toyota RAV4	Volkswagen Tigun	Skoda Superb
8 th	Audi A4	Toyota Corolla	Volvo XC40
9 th	Ford Focus	Skoda Enyaq	Volkswagen Golf
10 th	Volkswagen Golf	Volkswagen Golf	Volkswagen ID.4

Most popular car: Skoda Octavia



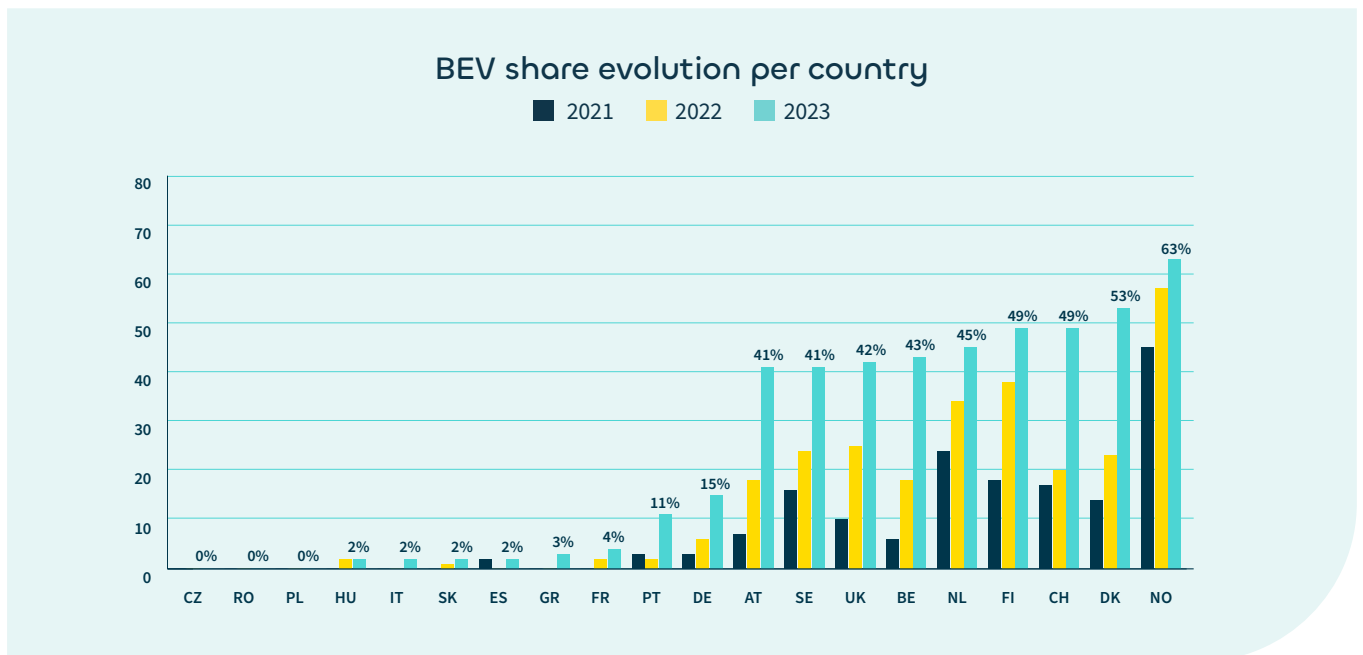
- Skoda and Volkswagen are the most popular car brands in industrial industry fleets with VW having 4 car models in the top 10 and Skoda having 3.
- The Volkswagen Passat was the most popular car in 2021 and 2022 but has dropped down to 4th position in 2023.
- Tesla has gone from having no cars in the top 10 to having its Model Y in 2nd place in 2023.

The share of diesel cars in fleet has decreased since 2021



- Since 2021, the share of petrol cars in industrial industry fleets has increased slightly, going from 14.3% in 2021 to 15.7% in 2023 while the share of plug-in hybrid electric vehicles (PHEVs) has decreased slightly in the same period.
- The decrease in diesel cars has resulted in an increase in both battery electric vehicles (BEVs) and hybrid cars, with the larger increases being in the share of BEVs in fleet.

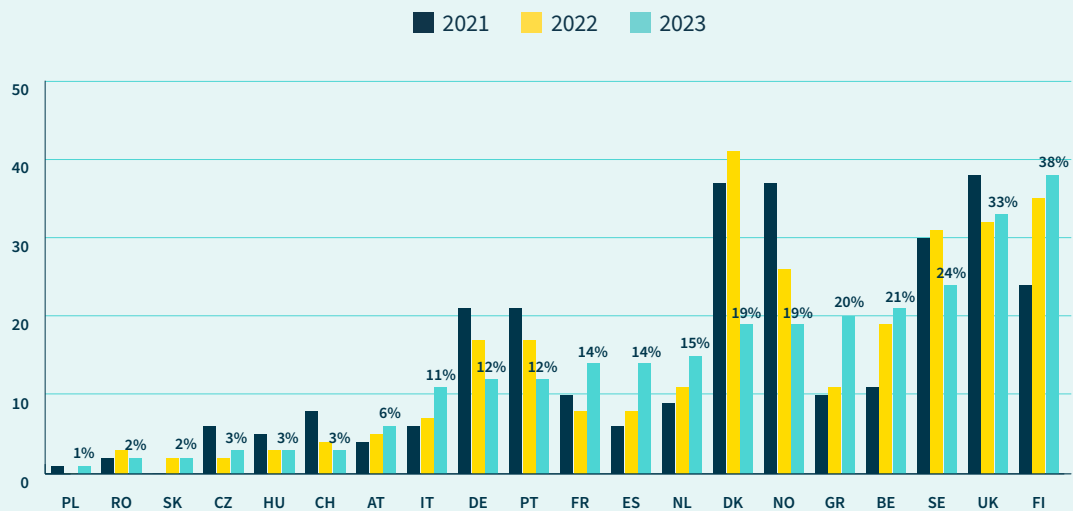
All countries have seen increases in the share of battery electric vehicles in industrial industry fleets since 2021.



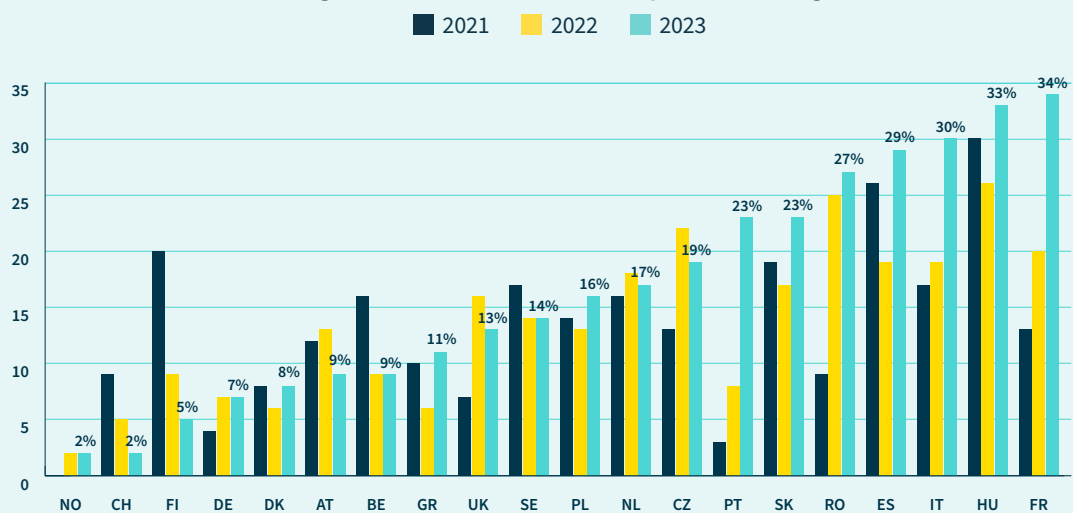
- The largest increases (more than 20 percentage points) in the share of BEVs in fleet over the past year have been in Austria, Belgium, Denmark and Switzerland.
- Norway and Denmark have a BEV share above 50% while Austria, Belgium, Finland, Netherlands, Sweden, Switzerland and the UK all have shares above 40%.

The popularity of plug-in hybrid electric vehicles (PHEVs) and hybrids depends on the country

PHEV share evolution per country



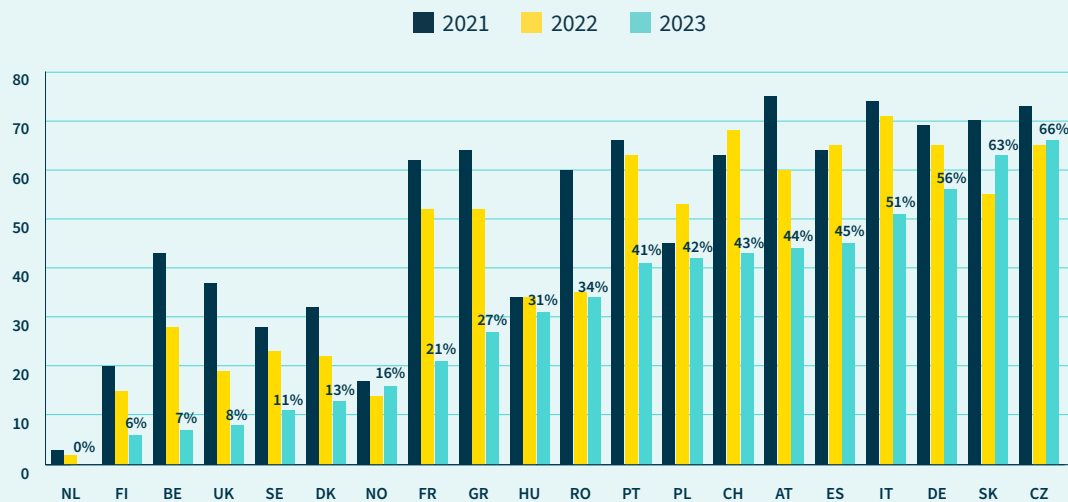
Hybrid share evolution per country



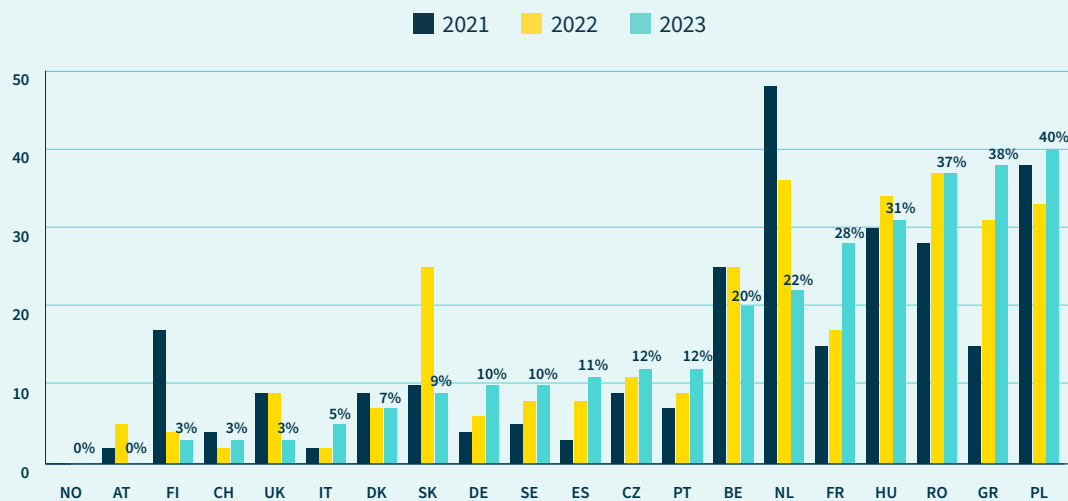
- Most countries have a PHEV share below 20% in industrial industry fleets with the exceptions being Finland (38%), Sweden (24%) and the UK (33%).
- Belgium, Greece and Finland have seen the largest increases in PHEVs in fleet since 2021.
- Hybrids are slightly more popular than PHEVs in industrial industry fleets with a higher share in most countries. France and Hungary have the highest share of hybrids in fleet.

The share of diesel cars in fleets is decreasing while petrol cars have slightly increased

Diesel share evolution per country

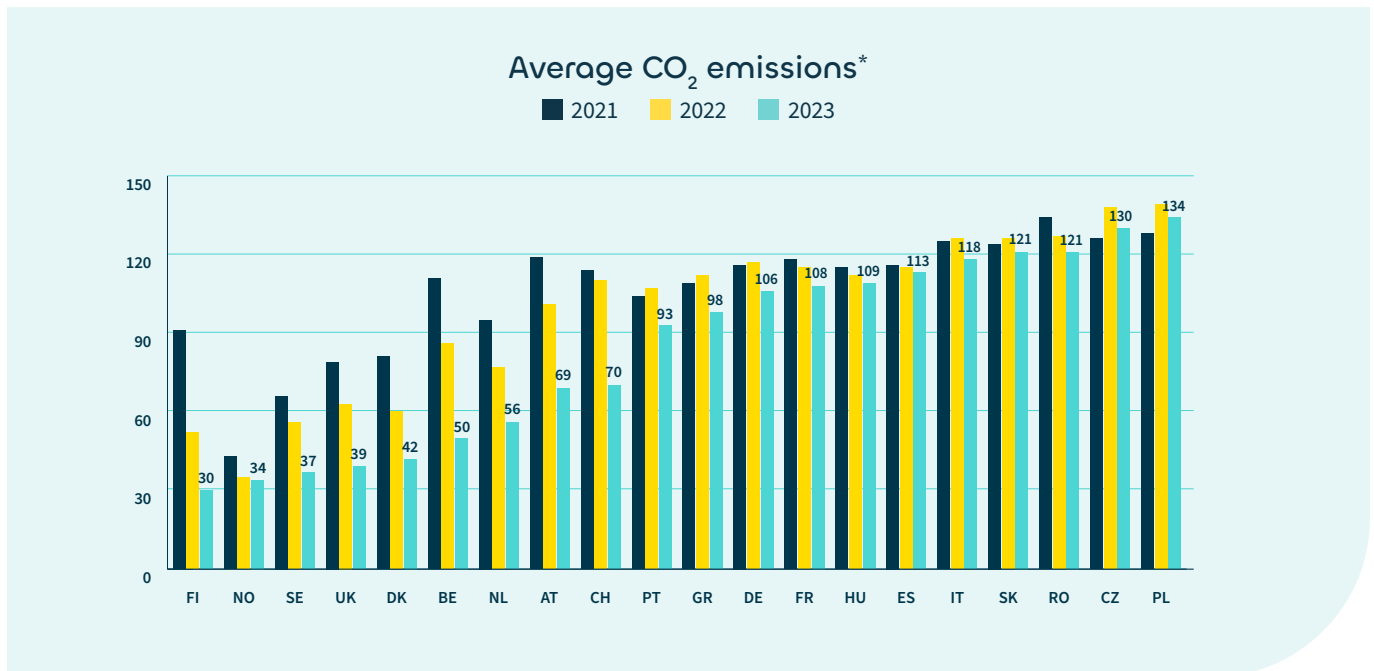


Petrol share evolution per country



- Belgium has had one of the largest decreases in the share of diesel cars, going from around 44% in 2021 to 7% in 2023.
- While most countries have kept the share of petrol cars in fleets fairly stable over the last two years, there have been some increases in countries like France, Germany, Greece and Spain. France has had one of the largest increases in the share of petrol cars in industrial industry fleets, increasing by roughly 15 percentage points since 2021.

Finland has had the largest decrease in average CO₂ emissions over the past two years


















- Most countries have decreased average emissions in 2023 to below 2021 levels but average emissions in Poland and the Czech Republic have slightly increased.
- Six countries (Finland, Norway, Sweden, UK, Denmark & Belgium) have average CO₂ emissions below 50 g/km, which has been primarily driven by the high share of battery electric vehicles in industrial industry fleets in those countries.

*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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