Pharmaceutical

industry benchmark

2024

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Contents

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 2021 and 2023.

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 145 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 share of diesel cars in pharmaceutical industry fleets is decreasing but, it is decreasing slower than other industries benchmarked causing the pharmaceutical industry to have the worst rating on the share of diesel in fleet in the Fleet Sustainability Ranking by Industry report.

While the share of diesel cars is decreasing more slowly in the pharmaceutical industry, these cars are being primarily replaced by battery electric vehicles (BEVs) and not petrol, hybrids or plug-in hybrids, leading to a "good" rating on the metric for BEVs.

Emissions have decreased across all countries since 2021, largely due to the move away from diesel cars and towards zero emission cars (battery electric vehicles) over low emissions cars (hybrids & PHEVs). Now more than half the countries included in this pharmaceutical industry benchmark have average fleet CO_2 emissions below 100 g/km.
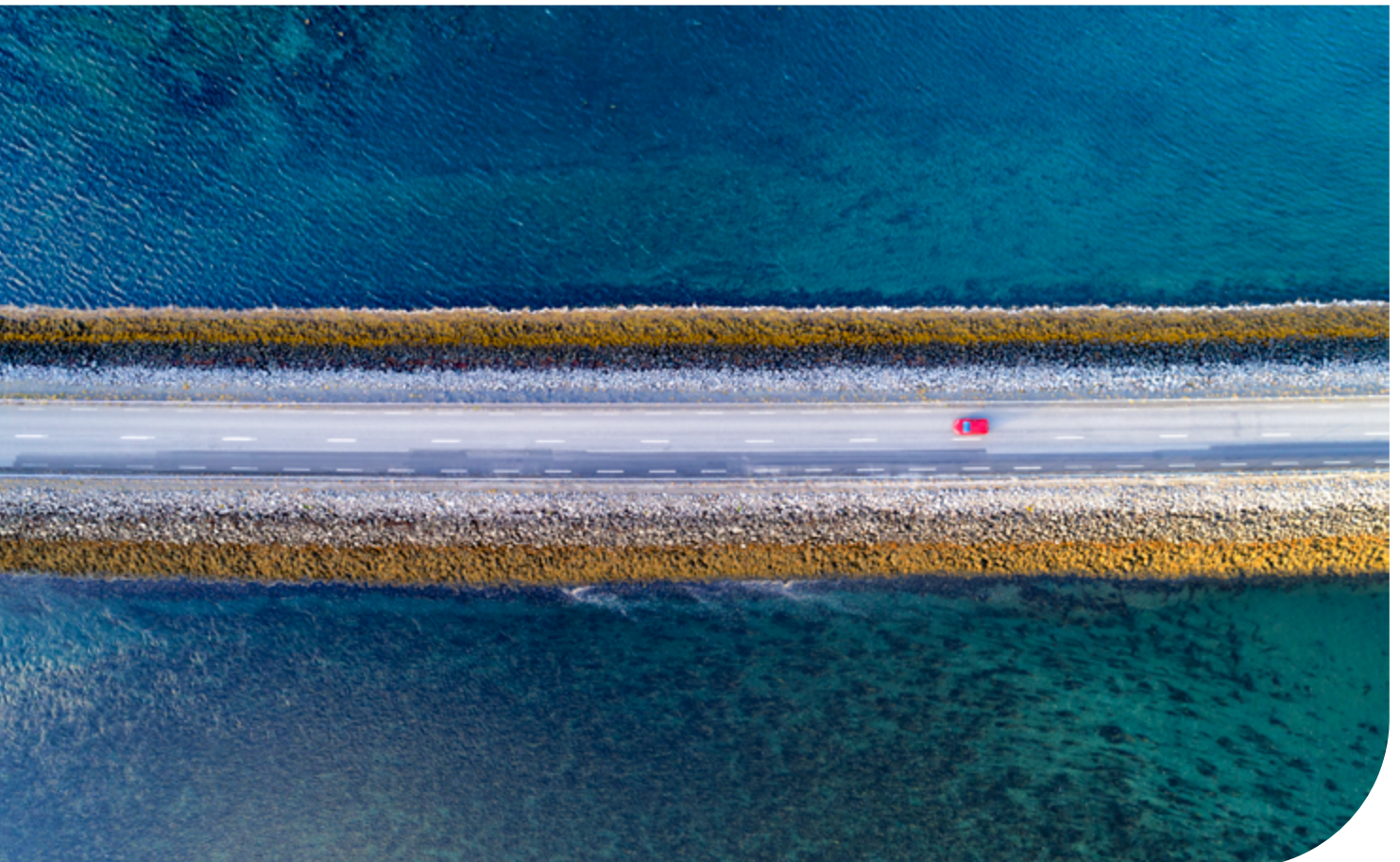
The SUV-D1 segment is the most popular segment in pharmaceutical industry fleets in 2023

Most driven car segments								
	2021			**2022**			**2023**	
	Segment	**%**		**Segment**	**%**		**Segment**	**%**
1st	SUV-C2	15%		SUV-C2	14%		SUV-D1	19%
2nd	D2	14%		D2	13%		SUV-C2	15%
3rd	SUV-D1	12%		SUV-D1	12%		D2	13%
4th	C1	11%		SUV-C1	12%		SUV-D2	11%
5th	SUV-D2	10%		SUV-D2	10%		C1	11%
6th	D1	9%		C1	9%		SUV-C1	9%
7th	SUV-C1	8%		D1	7%		D1	6%
8th	C2	6%		C2	6%		C2	5%
9th	E2	5%		E2	4%		E2	2%
10th	MPV-C	3%		MPV-C	3%		MPV-C	2%

Most popular segment: SUV-D1

- The SUV-C2 segment was the most popular car segment in 2021 and 2022 but in 2023 dropped down to second position.

- SUVs are overall a popular car model in pharmaceutical industry fleets with over 50% of cars being SUVs.

- Premium car models make up 3 of the 5 most popular cars.

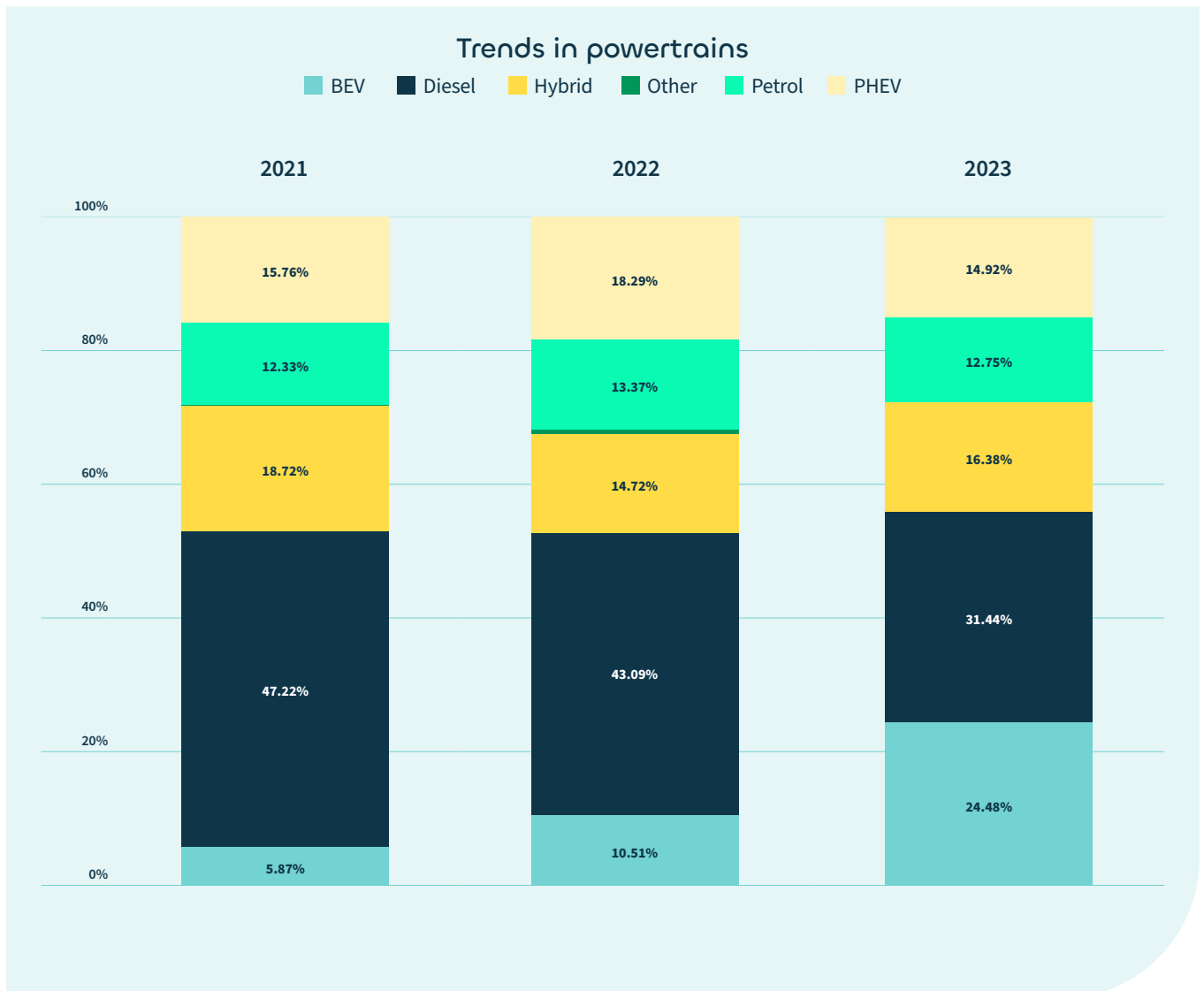# The Volkswagen ID.4 is the most popular car in pharmaceutical industry fleets

	2021 Make & Model	2022 Make & Model	2023 Make & Model
1st	BMWX1	Peugeot 3008	Volkswagen ID.4
2nd	BMW3 Series	BMWX1	Peugeot 3008
3rd	Volkswagen Passat	BMW3 Series	Skoda Octavia
4th	Toyota RAV4	Volkswagen Tiguan	Volkswagen Tiguan
5th	Toyota Corolla	Volkswagen Passat	BMWX1
6th	Volkswagen Tiguan	Volkswagen Golf	Tesla Model Y
7th	Audi Q3	Toyota RAV4	Volkswagen Passat
8th	Skoda Octavia	AudiQ3	Toyota Corolla
9th	BMWX3	Skoda Octavia	Toyota RAV4
10th	Audi A4	Mercedes CLA-Class	Audi Q3

Most popular car:
Volkswagen ID.4

- While the Volkswagen ID.4 is the most popular car in 2023, it is followed closely by the Pegeuot3008, which was the most popular car in 2022.

- Volkswagen is the most popular brand in pharma industry fleets with 3 of the top 10 cars coming from VW.

The share of diesel has decreased since 2021 but at a lower rate than other industries

Trends in powertrains

Legend: BEV · Diesel · Hybrid · Other · Petrol · PHEV

2021

Powertrain	Share
PHEV	15.76%
Petrol	12.33%
Hybrid	18.72%
Diesel	47.22%
BEV	5.87%

2022

Powertrain	Share
PHEV	18.29%
Petrol	13.37%
Hybrid	14.72%
Diesel	43.09%
BEV	10.51%

2023

Powertrain	Share
PHEV	14.92%
Petrol	12.75%
Hybrid	16.38%
Diesel	31.44%
BEV	24.48%

- Since 2021, the share of plug-in hybrid electric vehicles (PHEVs) and hybrids have slightly decreased in fleet share. While the share of petrol cars has remained fairly stable and increasing by less than a percentage point between 2022 and 2023.

- The decrease in diesel cars has led to the increase in battery electric vehicles (BEVs) with the share of diesel decrease leading to an almost equal increase in BEVs over two years.

All countries have seen a substantial increase in the share of battery electric vehicles in fleet over the past two years

BEV share evolution per country

■ 2021   ■ 2022   ■ 2023
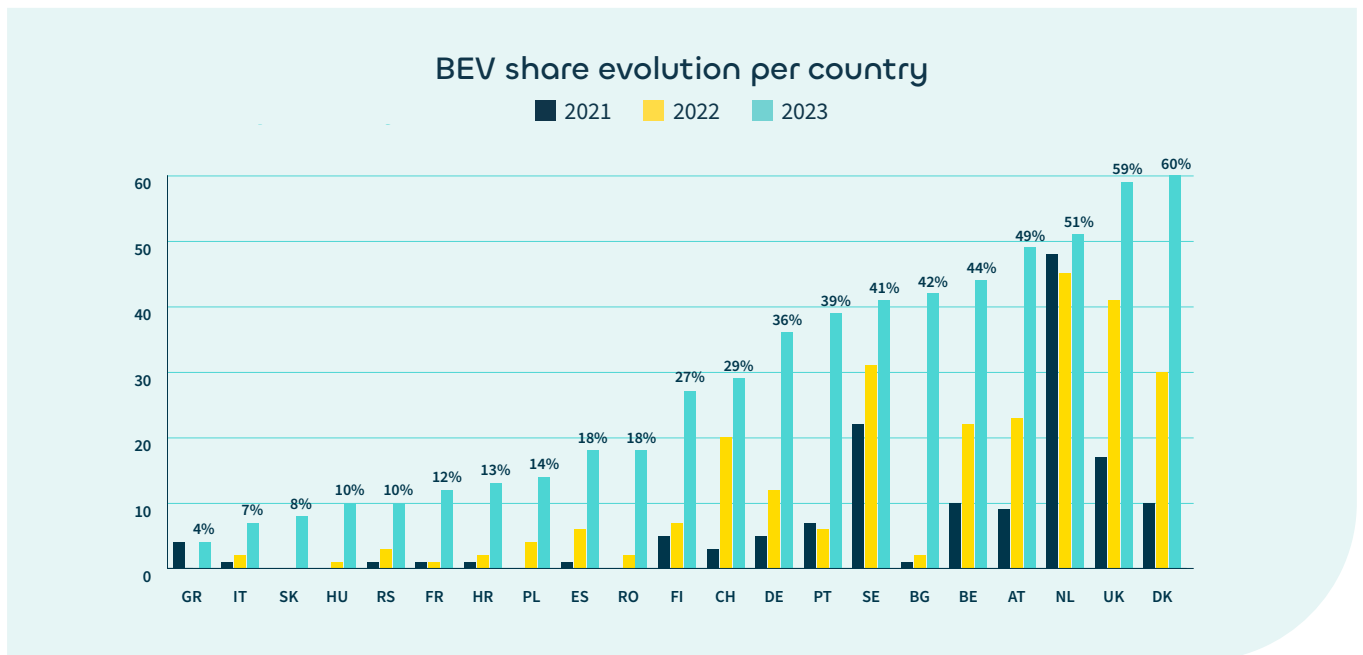
- Austria, Belgium, Bulgaria, Denmark, Germany and Portugal have all seen an almost 20 percentage point increase in the share of BEVs in pharma fleets over the past year.

- While BEV uptake is higher in most western and northern European countries, the share in southern and eastern European countries is at a higher level in pharma industry fleets than fleets in other industries.

Only a few countries have seen large increases in the share of plug-in hybrids and hybrid cars since 2021

PHEV share evolution per country

2021　2022　2023
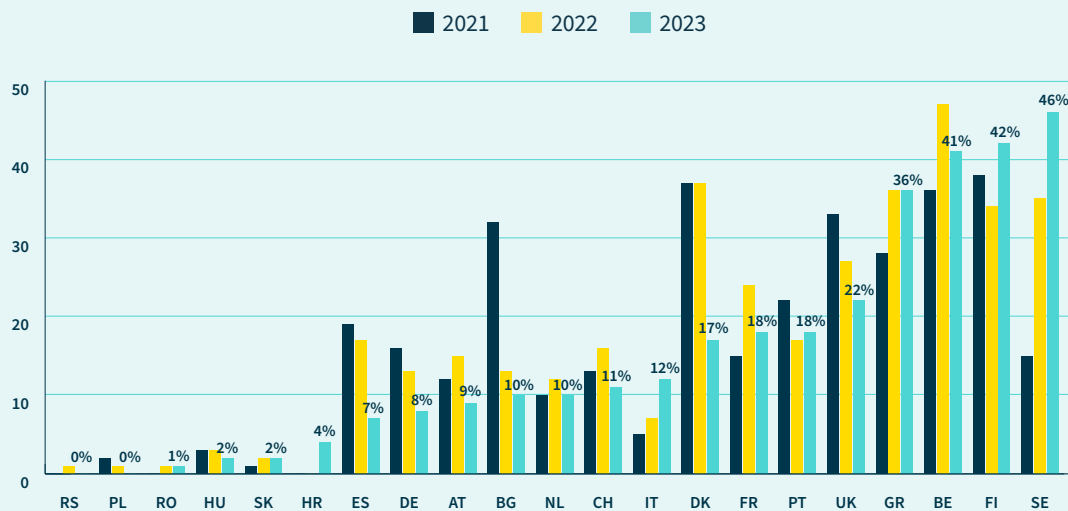
Hybrid share evolution per country

2021　2022　2023
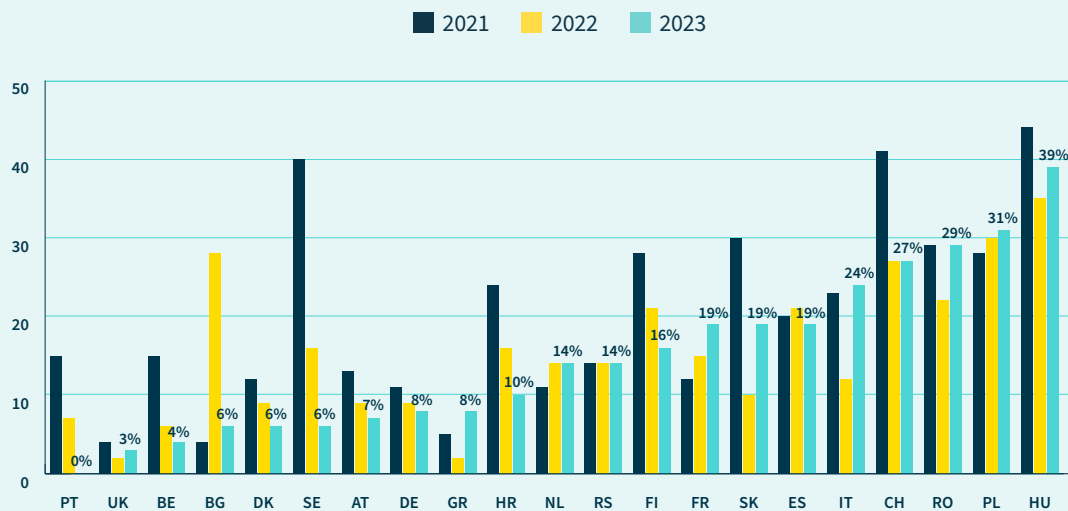
- The share of plug-in hybrid electric vehicles (PHEVs) has increased the most in Sweden since 2021. Going from less than 20% fleet share in 2021 to 46% in 2023.

- Most countries have kept the share of PHEVs and hybrids in fleet stable over the past 2 years.

- Portugal has decreased the share of hybrid cars in fleet from around 15% in 2021 to 0% in 2023, making the switch the battery electric vehicles.

Most countries have decreased the share of diesel cars in fleet, but at differing levels

Diesel share evolution per country

■ 2021 ■ 2022 ■ 2023

Petrol share evolution per country

■ 2021 ■ 2022 ■ 2023
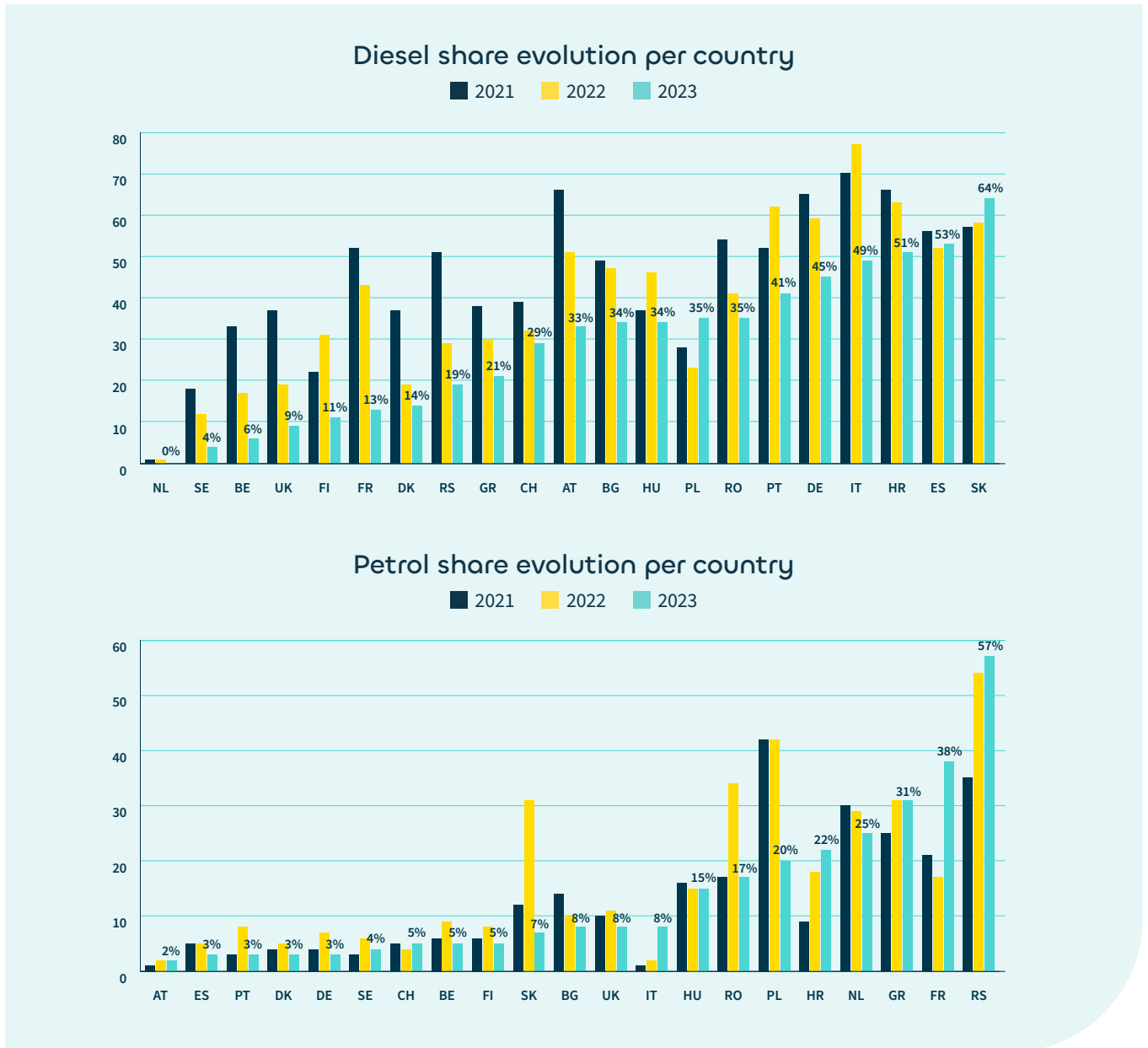
- Serbia has the highest share of petrol cars in pharmaceutical industry fleets at 57%, while the country with the 2nd highest level (France) has a share at 38%. France and Serbia are the only two countries that have had large increases in the share of petrol cars in fleet.

- The largest decreases in share of diesel cars in fleet over the past two years have been in Austria, Belgium, Denmark, France and Italy.

- The Netherlands is the only country where the share of diesel cars in pharma industry fleets is at zero in 2023.

More than half of the countries have average CO$_2$ emissions under 100 g/km in pharma industry fleets
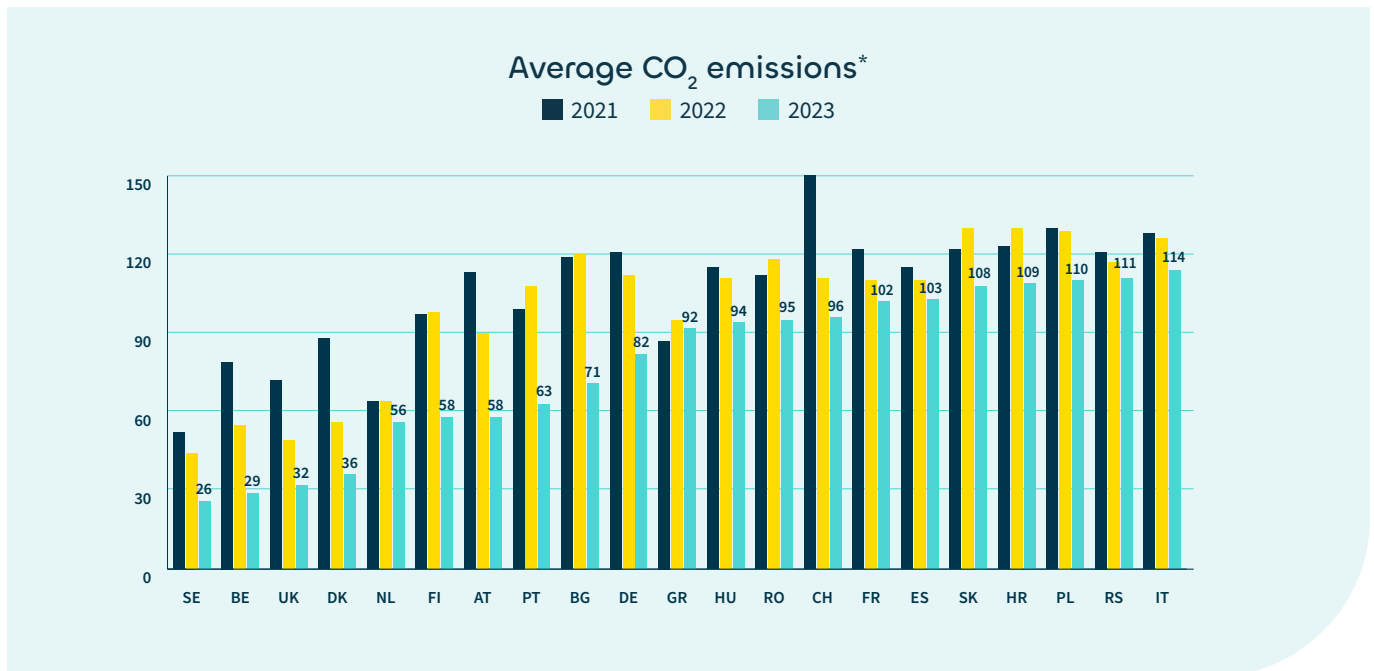
Average CO$_2$ emissions*

■ 2021 ■ 2022 ■ 2023

- Emissions have decreased across all countries since 2021, largely due to the move away from diesel cars and towards zero emission cars (battery electric vehicles) over low emissions cars (hybrids & PHEVs).

- Denmark, UK, Finland and Belgium all have average CO$_2$ emissions below 50 g/km and Sweden has the lowest average CO$_2$ emissions in pharma industry fleets at 26 g/km.

*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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