

# Construction

## industry benchmark

2024



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# Introduction

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

The following definition of the Construction industry has been applied: Companies involved in developing any physical buildings or infrastructure or being part of the building/infrastructure-development supply chain

This analysis of fleet trends is based on Ayvens passenger car data from 83 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 set against a dark teal background.

# Results 2023

## Key insights



Compared to other industries benchmarked, the construction industry has seen some of the largest improvements in reducing the share of diesel cars in fleet, replacing these with battery electric vehicles and as a result, reducing average CO<sub>2</sub> emissions.



The construction industry has seen one of the largest decreases in the share of diesel in fleet, giving this industry a score of 4 (lowest diesel share metric), which is considered “good” in the rankings. The construction industry also has the best rating for the share of battery electric vehicles in fleet, with a score of 1.



Overall, the trend in the construction industry seems to be moving away from diesel and petrol cars and where possible, making the switch to battery electric vehicles.



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

Most driven car segments							
	2021		2022		2023		
	Segment	%	Segment	%	Segment	%	
1 <sup>st</sup>	C1	19%	C1	22%	C1	24%	
2 <sup>nd</sup>	SUV-B1	18%	SUV-D1	13%	SUV-D1	13%	
3 <sup>rd</sup>	B1	13%	SUV-B1	12%	SUV-B1	12%	
4 <sup>th</sup>	SUV-D1	11%	SUV-C1	11%	SUV-C1	10%	
5 <sup>th</sup>	SUV-C1	10%	B1	10%	B1	10%	
6 <sup>th</sup>	MPV-D	6%	D2	7%	D2	7%	
7 <sup>th</sup>	D2	5%	D1	4%	SUV-D2	6%	
8 <sup>th</sup>	D1	5%	SUV-C2	4%	SUV-C2	6%	
9 <sup>th</sup>	SUV-D2	3%	SUV-D2	4%	D1	4%	
10 <sup>th</sup>	SUV-C2	3%	C2	2%	C2	2%	

Most popular segment in 2023: C1

- The C1 segment retains its popularity with almost 25% of cars leased in the construction industry being in the C1 segment.
- Premium car segments are less popular in the construction industry compared to other industries benchmarked with only 21% of cars being in the premium segment.
- Popularity of SUVs has remained stable over the past two years.

## Peugeot is by far the most popular car brand in the construction industry with 4 makes in the top 10

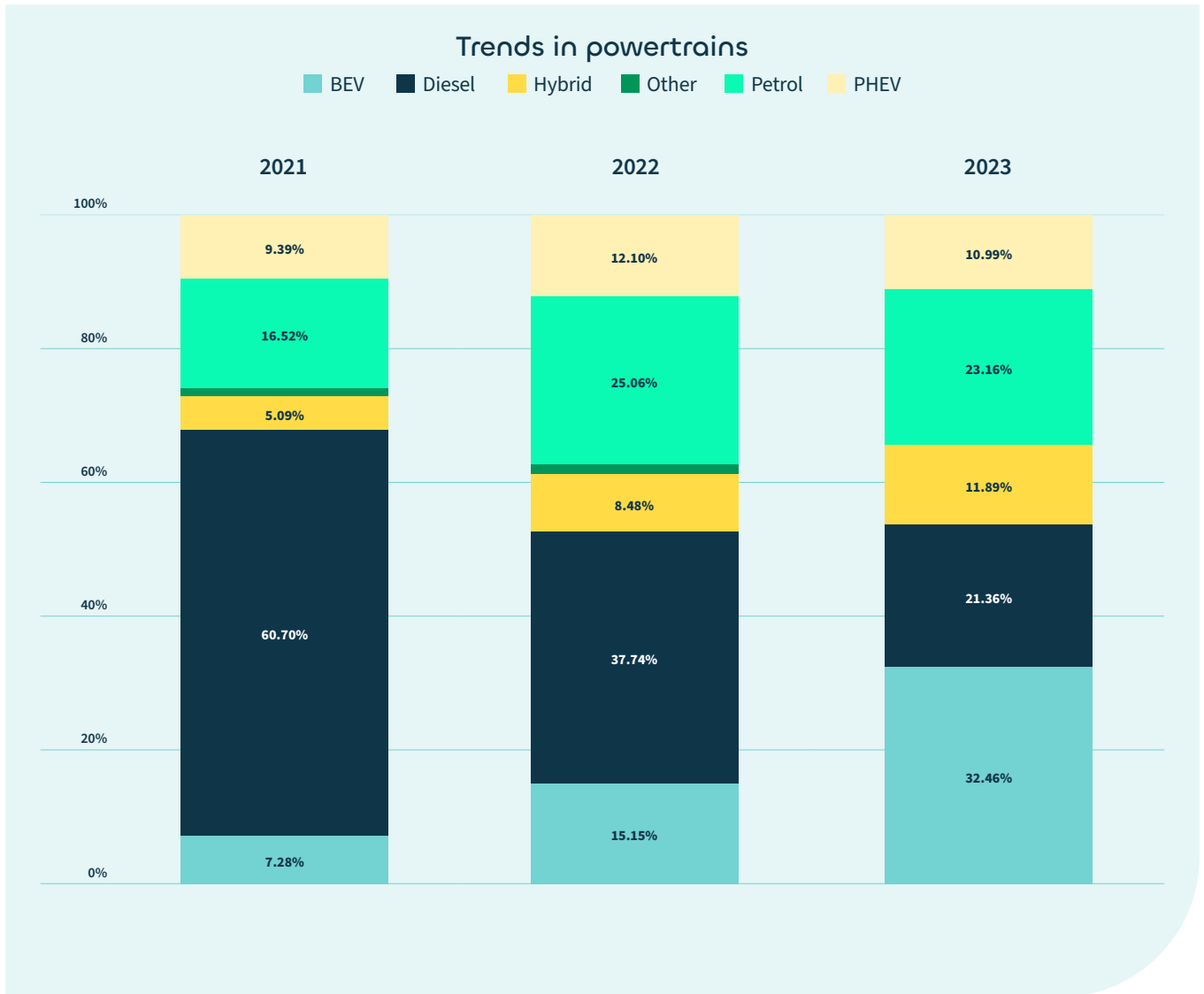
	2021 Make & Model	2022 Make & Model	2023 Make & Model
1 <sup>st</sup>	Peugeot 2008	Peugeot 2008	Peugeot 2008
2 <sup>nd</sup>	Peugeot 3008	Peugeot 3008	Peugeot 3008
3 <sup>rd</sup>	Renault Clio	Citroen C5 Aircross	Renault Megane E-Tech
4 <sup>th</sup>	Peugeot 308	Renault Megane	Peugeot 208
5 <sup>th</sup>	Citroen Grand C4 Spacetourer	Peugeot 308	Renault Captur
6 <sup>th</sup>	Citroen C5 Aircross	Renault Clio	Peugeot 3008
7 <sup>th</sup>	Peugeot 208	Peugeot 208	Citroen C5 Aircross
8 <sup>th</sup>	Renault Megane	Renault Captur	Tesla Model Y
9 <sup>th</sup>	Peugeot 5008	Skoda Octavia	Citroen C3
10 <sup>th</sup>	Volkswagen Golf	Volkswagen Golf	Volvo XC40

### Most popular car: Peugeot 2008



- The Peugeot 2008 is the most popular car in construction industry fleets for the third year in a row.
- Peugeot has three models in the top five, with the other two models coming from Renault.

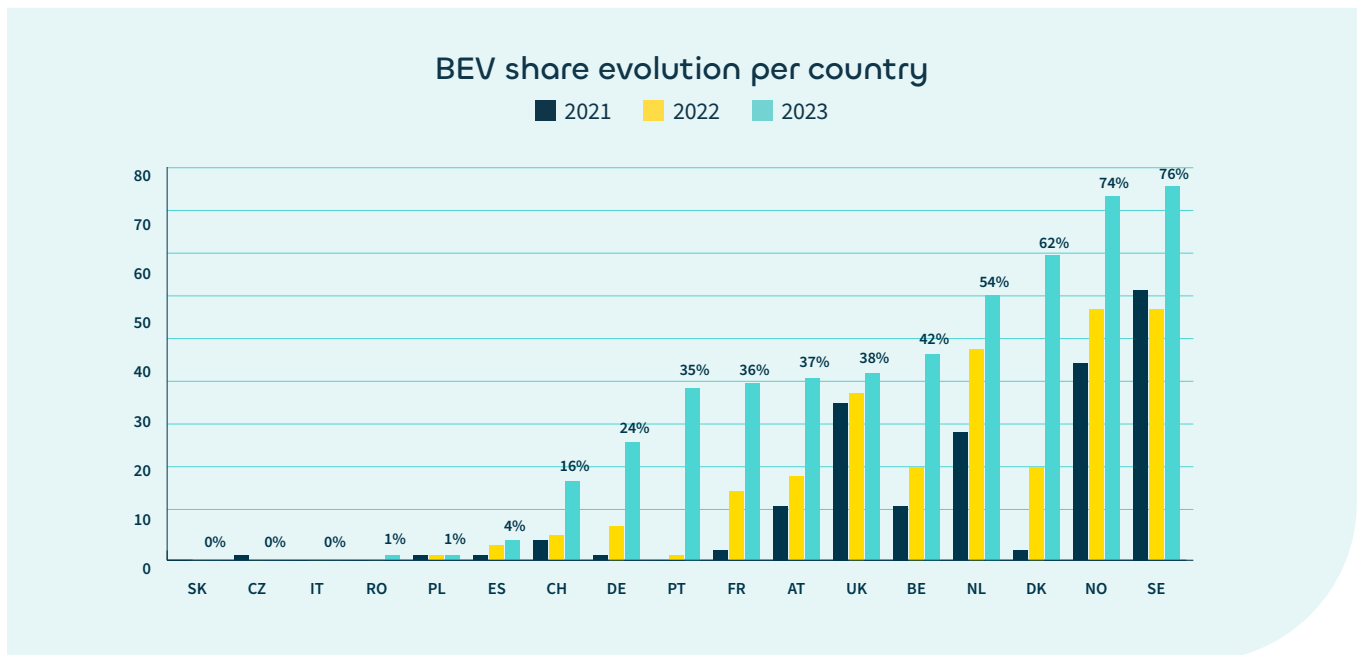
# The construction industry fleets have seen the largest drop in share of diesel cars in fleet, compared to other industries



- The share of diesel cars in fleet has decreased by almost 40 percentage points over the past two years.
- The decrease in diesel has resulted in an increase in battery electric vehicles (BEVs) and hybrids and, to a smaller extent, petrol cars.
- Plug-in hybrids have increased slightly since 2021 but a much less significant increase than what’s seen with BEVs.



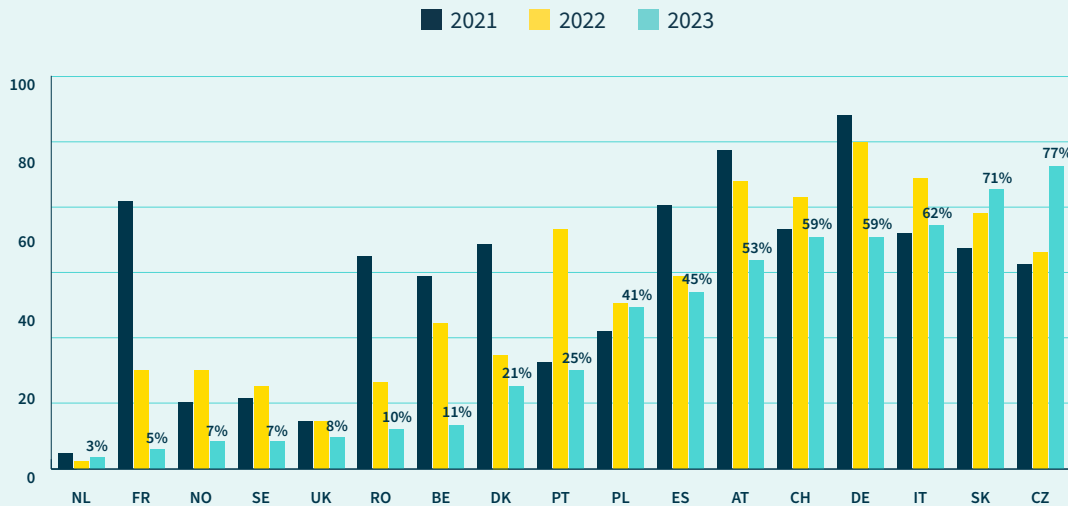
## Sweden, Norway and Denmark are much further when it comes to zero emission fleets with high share of BEVs in fleet



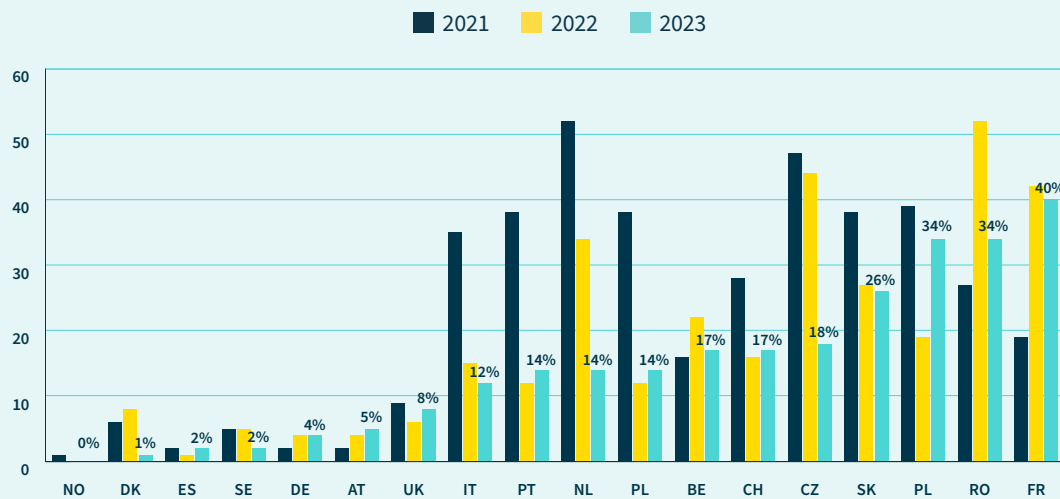
- The share of battery electric vehicles in fleets is only increasing year on year and as charging infrastructure increases, we can expect this to be seen in countries that currently have a 0% BEV share in construction industry fleets.
- 10 countries now have a BEV share (in construction industry fleets) above 25%.
- Portugal has seen the largest increase in BEVs in construction industry fleets going from around 1% in 2022 to 35% in 2023.

# Since 2021, the decrease in share of diesel cars is much larger compared to the decrease in petrol

Diesel share evolution per country



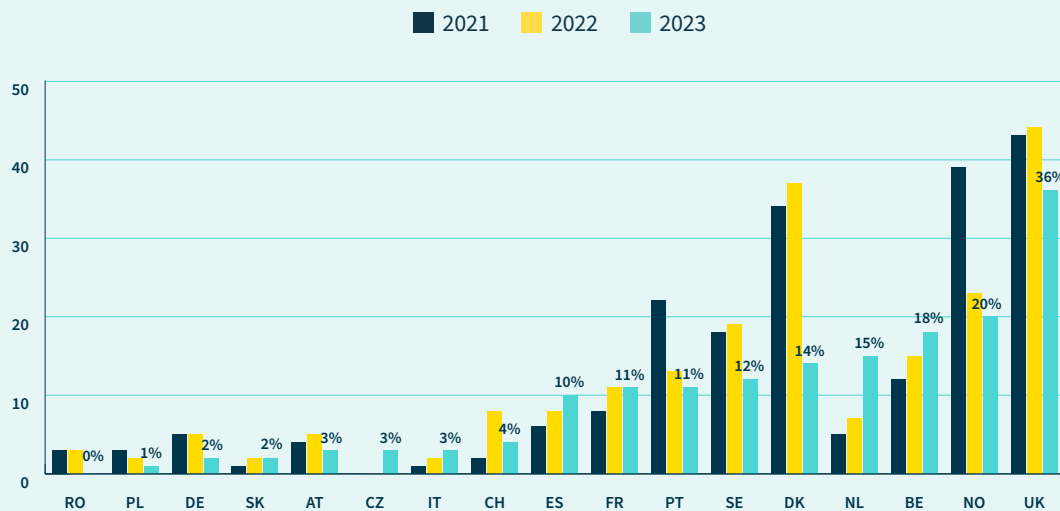
Petrol share evolution per country



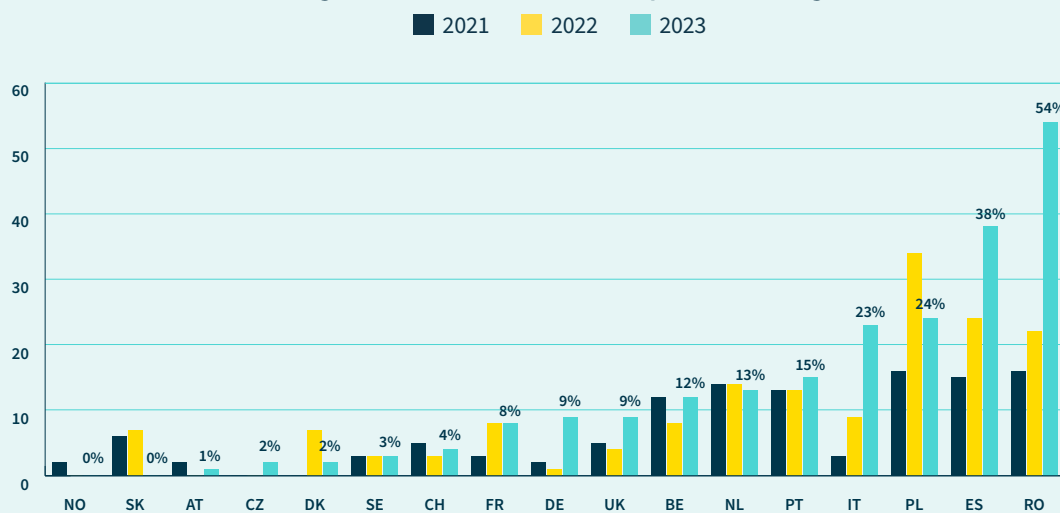
- France has seen the largest decrease in share of diesel cars in fleet with the share being only 5% in 2023, down from over 50% in 2022.
- The Netherlands, France, Sweden, Norway and the UK have the lowest shares of diesel cars in fleet, with all being below 10%.
- The share of petrol cars in fleet differs depending on the country with some countries having zero petrol cars in fleet (Norway) while others have a larger share (France & Poland).

# The share of hybrids and plug-in hybrids in fleet is similar but differences can be seen on a country level

PHEV share evolution per country

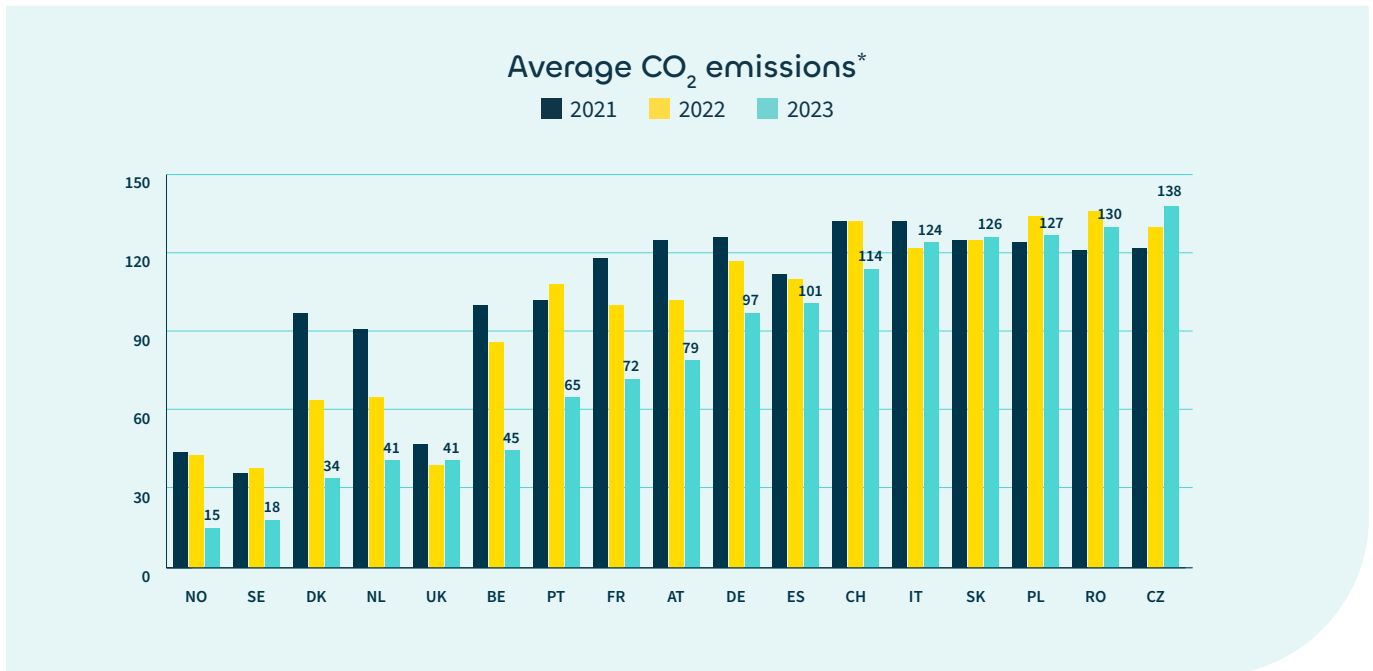


Hybrid share evolution per country



- The United Kingdom has by far, the highest share of plug-in hybrid electric vehicles in construction industry fleets.
- The share of hybrids cars in fleets is largest in Romania at more than 50% in 2023, followed by Spain at 38%. Most other countries have shares of hybrid vehicles in the single digits or low double digits.

## Norway and Sweden have the lowest average CO<sub>2</sub> emissions due to the high share of battery electric vehicles in fleet



- While overall, emissions are decreasing, an increase can be seen in a few countries including, Bulgaria, Croatia, Czech Republic and Serbia. All have higher emissions in construction industry fleets in 2023 than in 2021.
- 7 countries now have CO<sub>2</sub> emissions below 50 g/km, including Finland which went from an average of 118 g/km in 2021 to 42 g/km in 2023.

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

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