

# Energy and Chemical benchmark

2024



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# Introduction

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

The following definition of the Energy and Chemical industry has been applied: **Companies operating in the production, distribution or sale of energy (oil, electricity, gas) or chemicals.**

This analysis of fleet trends is based on Ayvens' passenger car data from 111 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 decrease in average fleet CO<sub>2</sub> emissions is less pronounced in energy and chemical fleets compared to other fleets benchmarked. Some countries like Belgium, Sweden and Finland have decreased emissions substantially since 2021 while other countries like Romania, Spain and the Czech Republic have seen slight increases in CO<sub>2</sub> emissions in the same period.



The share of hybrids, plug-in hybrids and petrol cars in energy and chemical fleets have slightly increased since 2021 but the largest changes in powertrain share are the big decreases in diesel cars and the corresponding increase in battery electric vehicles.



## The SUV-D1 segment is the most popular car segment in energy and chemical industries for the third year in a row

Most driven car segments						
	2021		2022		2023	
	Segment	%	Segment	%	Segment	%
1 <sup>st</sup>	SUV-D1	19%	SUV-D1	20%	SUV-D1	21%
2 <sup>nd</sup>	SUV-B1	13%	SUV-C1	13%	C1	16%
3 <sup>rd</sup>	SUV-C1	13%	SUV-B1	13%	SUV-C1	11%
4 <sup>th</sup>	C1	12%	C1	12%	D2	9%
5 <sup>th</sup>	D2	8%	D2	8%	SUV-B1	9%
6 <sup>th</sup>	B1	6%	B1	7%	SUV-D2	8%
7 <sup>th</sup>	D1	6%	SUV-D2	6%	SUV-C2	7%
8 <sup>th</sup>	SUV-D2	5%	SUV-C2	6%	D1	5%
9 <sup>th</sup>	SUV-C2	5%	D1	5%	B1	4%
10 <sup>th</sup>	C2	3%	C2	2%	C2	3%

**Most popular segment: SUV-D1**

- Over half of the cars driven in energy and chemical industry fleets are SUVs, including two premium SUV segments (SUV-D2 & C2).

## The Peugeot 2008 is the most popular car in energy and chemical fleets for the third year in a row

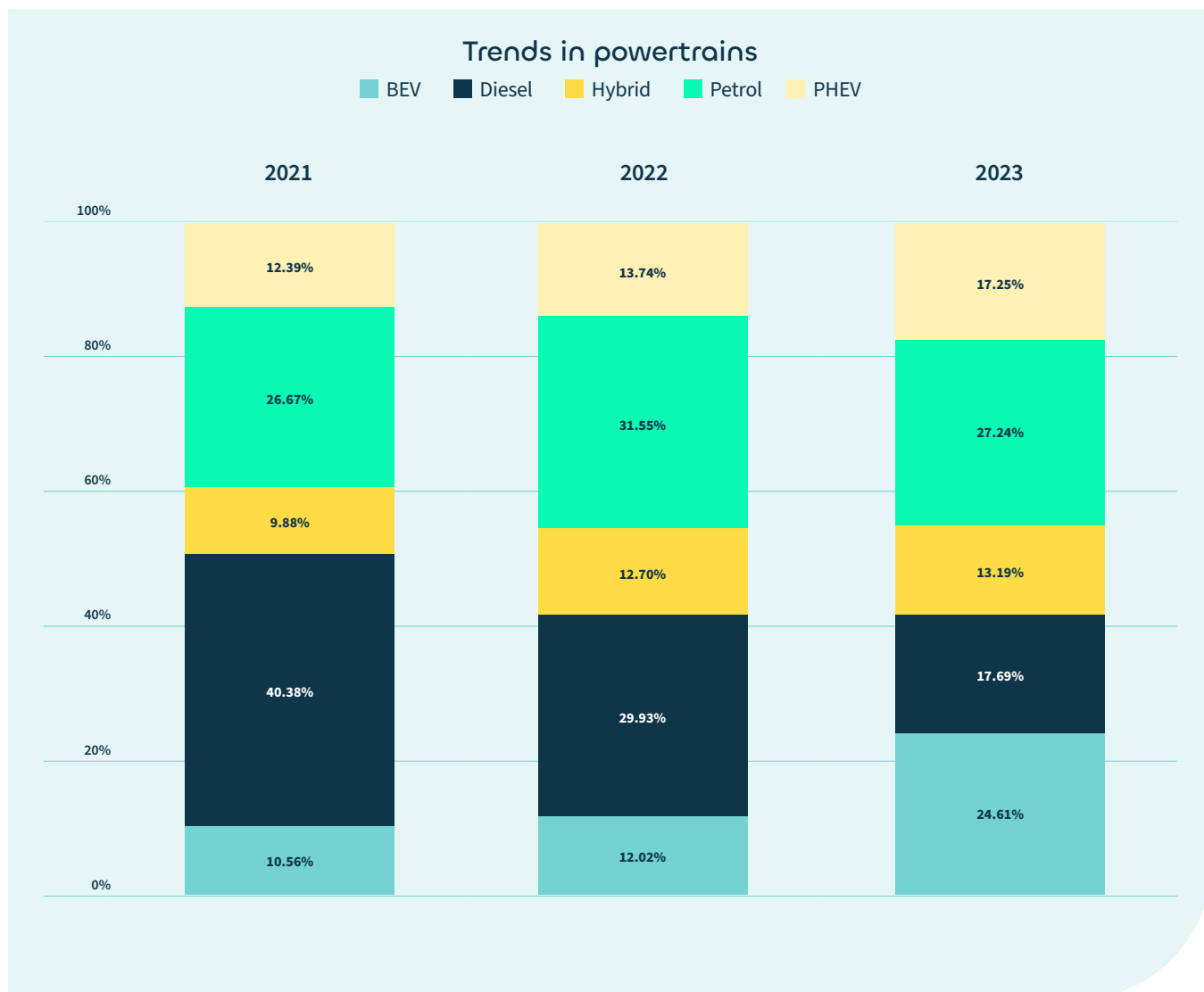
	2021 Make & Model	2022 Make & Model	2023 Make & Model
1 <sup>st</sup>	Peugeot 2008	Peugeot 2008	Peugeot 2008
2 <sup>nd</sup>	Peugeot 3008	Peugeot 3008	Peugeot 5008
3 <sup>rd</sup>	Peugeot 5008	Peugeot 5008	Peugeot 3008
4 <sup>th</sup>	Citroen C5 Aircross	Renault Clio	Peugeot 308
5 <sup>th</sup>	Peugeot 308	Citroen C5 Aircross	Tesla Model Y
6 <sup>th</sup>	Toyota Corolla	Peugeot 308	Skoda Octavia
7 <sup>th</sup>	Skoda Enyaq	Renault Megane	Skoda Enyaq
8 <sup>th</sup>	BMW 3 Series	Volvo XC40	Citroen C5 Aircross
9 <sup>th</sup>	Citroen C3	BMW 3 Series	Volvo XC40
10 <sup>th</sup>	Peugeot 508	Renault Arkana	Renault Megane

### Most popular car: Peugeot 2008



- Peugeot models dominate the top five with four of the five most popular cars being from Peugeot.
- While Peugeot is clearly the most popular car brand in energy and chemical industry fleets, there is not much difference in the popularity of models, with 1 percentage point differences between the cars in the top five.

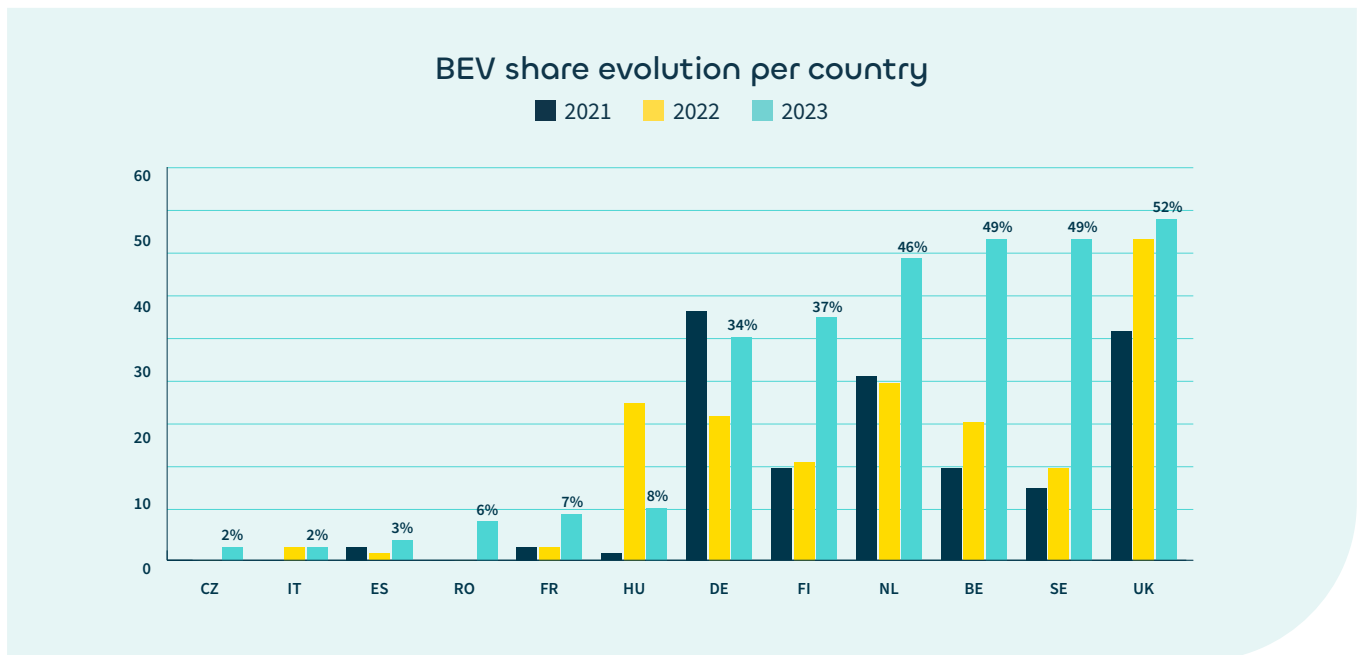
## The share of diesel cars in energy and chemical fleets has more than halved since 2021



- The share of diesel has decreased since 2021, while the shares of battery electric vehicles (BEVs), petrol, plug-in hybrid electric vehicles (PHEVs) and hybrids has increased in this period.
- Battery electric vehicles have seen the largest increase over the past three years compared to the other powertrains.



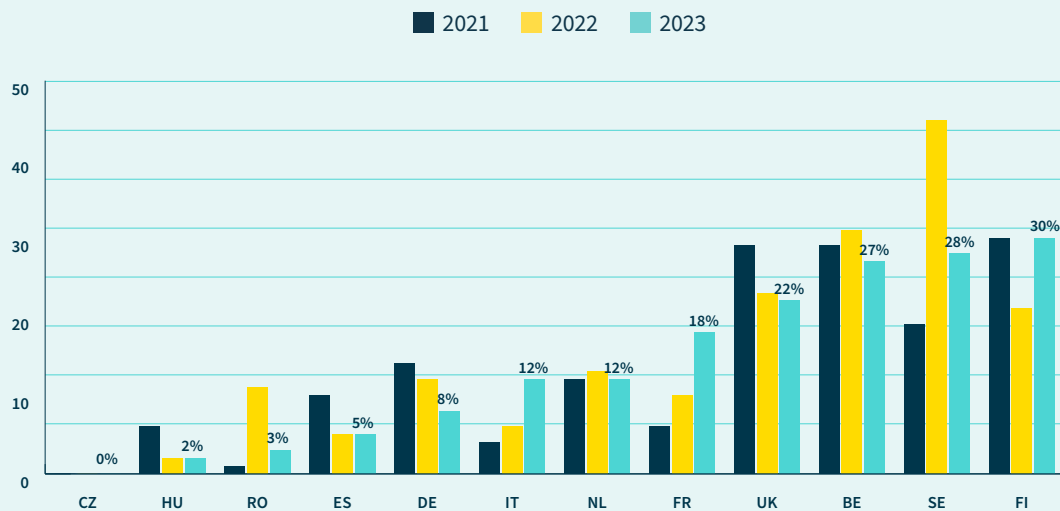
## The UK has the highest share (52%) of battery electric vehicles in energy & chemical fleets in 2023



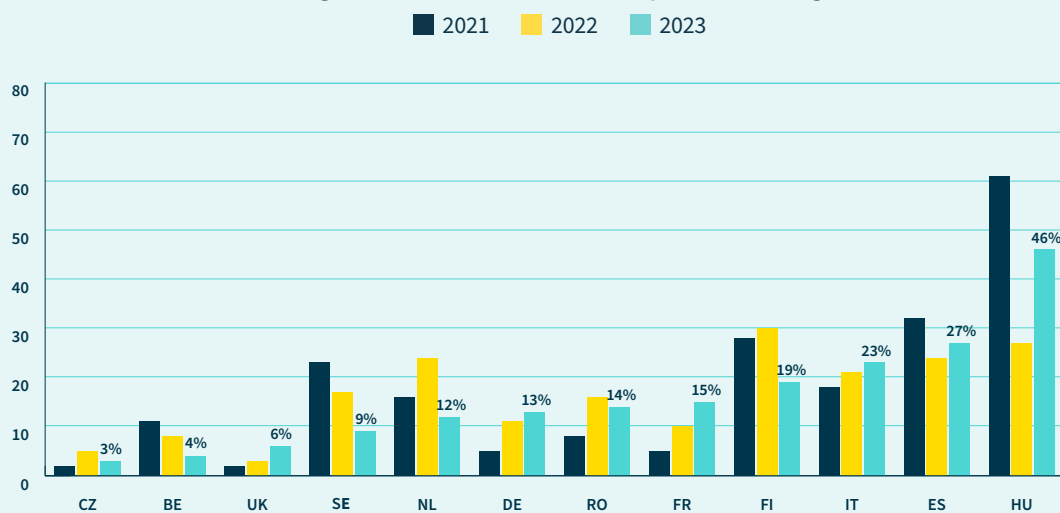
- Battery electric vehicle adoption is increasing in all countries, however at lower rates compared to other industries benchmarked.
- Only four countries (Belgium, Netherlands, Sweden and UK) have a BEV share above 40%.

# The share of plug-in hybrids and hybrids have increased slightly in some countries but overall, remained stable

PHEV share evolution per country



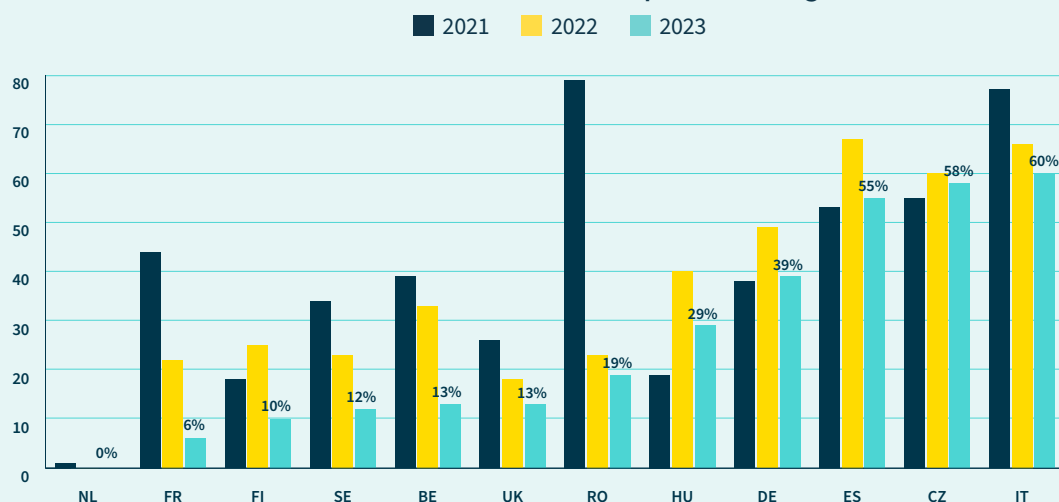
Hybrid share evolution per country



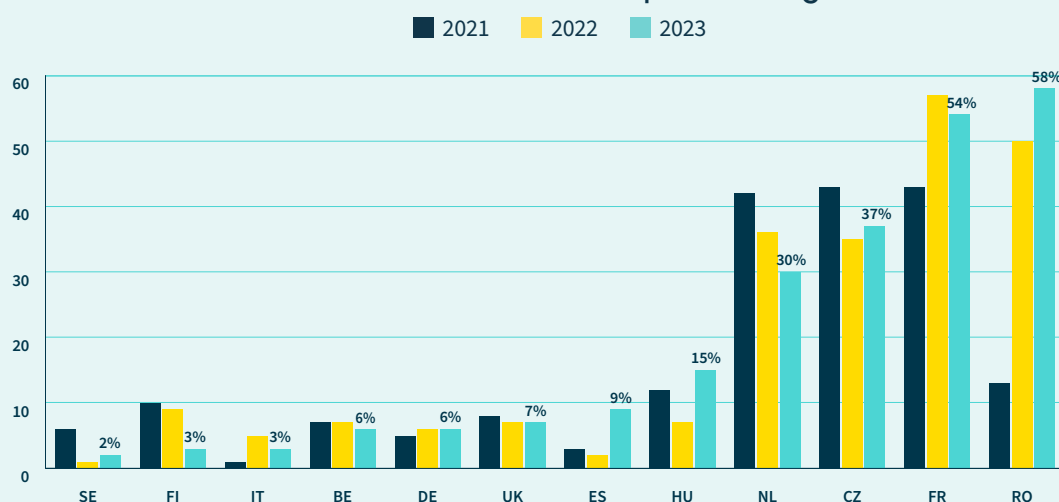
- The share of PHEVs have increased in Finland, France and Italy over the past year while in most other countries, the share has remained the same.
- There has been more movement in the share of hybrids in fleet compared to PHEVs. Some countries like Austria, Germany and the UK have seen modest increases in hybrids while others like Belgium, the Netherlands and Sweden have seen small decreases.

## Almost all countries have decreased the share of diesel cars in fleet compared to 2021

### Diesel share evolution per country

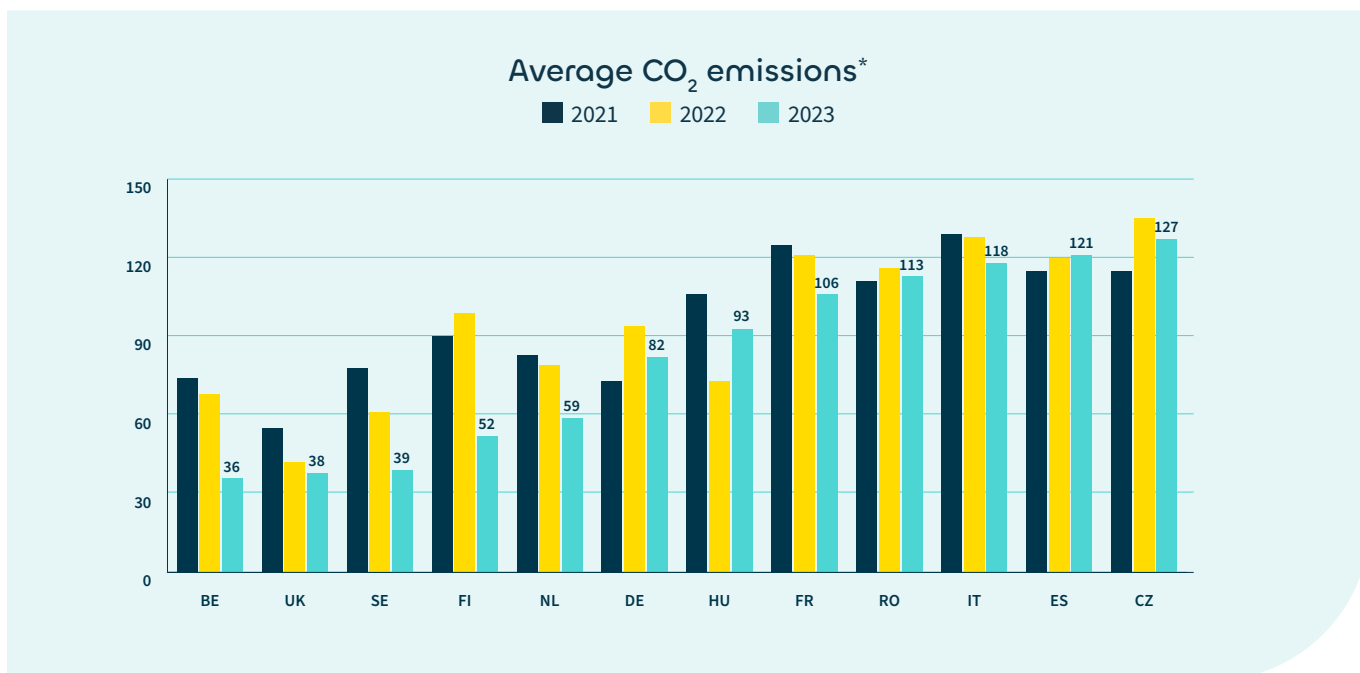


### Petrol share evolution per country



- The Czech Republic and Poland are the only two countries that have slightly increased the share of diesel cars in fleet since 2021.
- The Netherlands has, by far, the lowest share of diesel cars at less than 1% in 2023. While countries like Czech Republic and Italy have diesel fleet shares above 50%.
- France and Romania have the highest share of petrol cars in fleet, with both being over 50%.

## Due to the higher-than-average share of diesel and petrol cars energy and chemical fleets in the Czech Republic have the highest average CO<sub>2</sub> emissions


















- The decrease in average fleet CO<sub>2</sub> emissions is less pronounced in energy and chemical fleets compared to other fleets benchmarked.
- Some countries like Belgium, Sweden and Finland have decreased emissions substantially since 2021 while other countries like Romania, Spain and the Czech Republic have seen slight increases in CO<sub>2</sub> emissions in the same period.

\*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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