

FLEET AND MOBILITY BAROMETER 2025

COUNTRY REPORT



1 FLEET CHARACTERISTICS

2 FINANCING METHODS

3 ENERGY MIX

4 CONNECTED FLEETS

5 EMPLOYEE MOBILITY

6 FUTURE CHALLENGES

SURVEY OVERVIEW

RESEARCH APPROACH

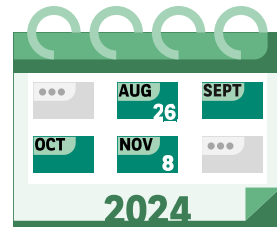


8,061

INTERVIEWS WITH
CORPORATE FLEET
DECISION MAKERS

**20-MINUTE
PHONE INTERVIEWS**

FIELDWORK



READING NOTES ABOUT THE REPORT

Some graphics may not be perfectly equal to 100%. It is due to rounding.

RESEARCH OBJECTIVES

1



What short term shifts
are shaping the market?

2



What kind of vehicles will
the market expect in 3 years?

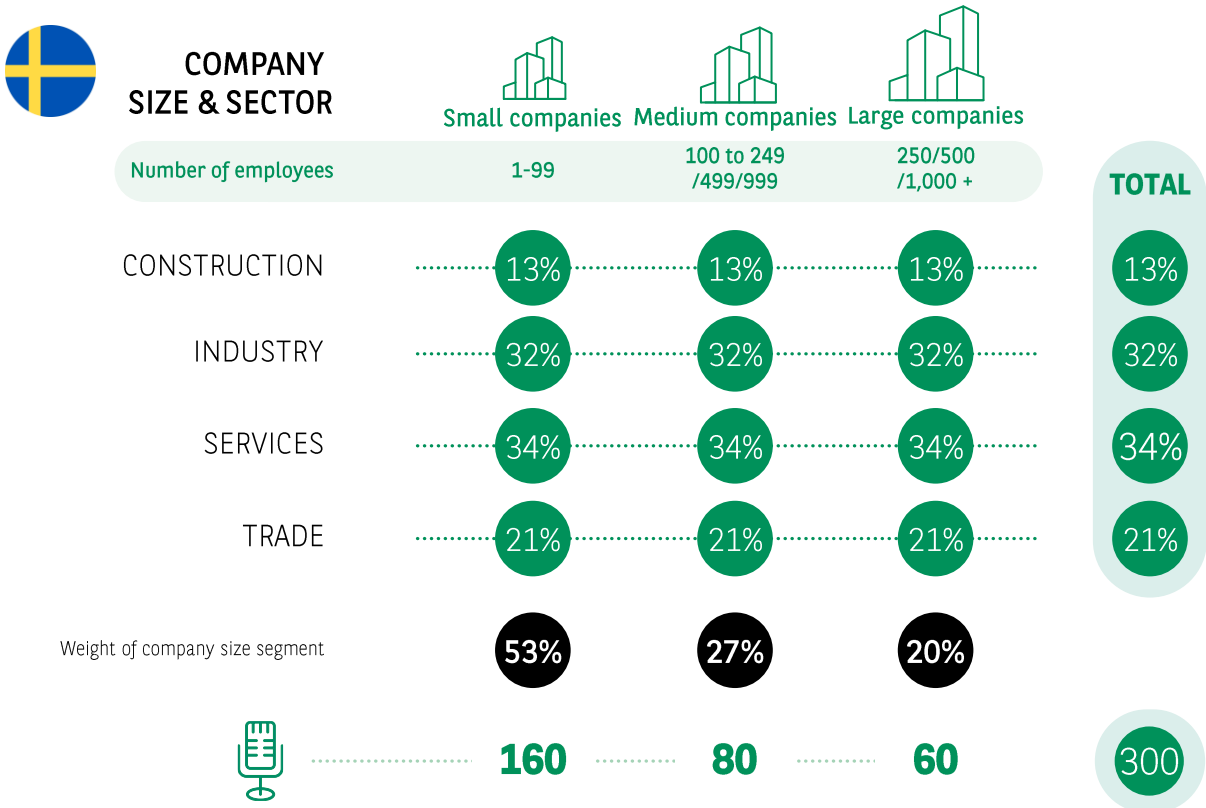
3



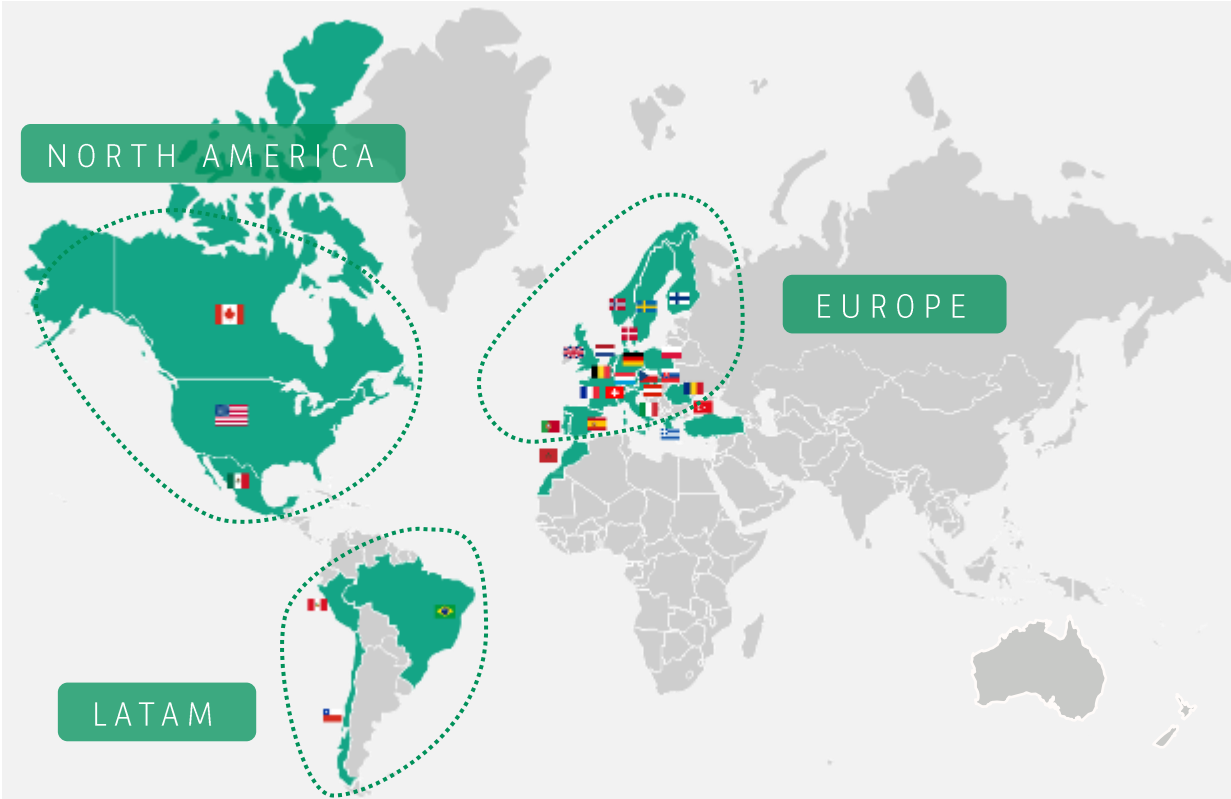
How do mobility solutions
impact corporate mobility?

SAMPLE STRUCTURE AND SCOPE

QUOTAS ON COMPANY SIZE & INDUSTRY



30 COUNTRIES - 3 REGIONAL BENCHMARKS



Morocco and Turkey : compared with Europe benchmark

KEY COUNTRY INSIGHTS



DESPITE PERSISTENT GLOBAL UNCERTAINTIES, MOST SWEDISH COMPANIES REMAIN CONFIDENT ABOUT THE FUTURE OF THEIR FLEETS

92% anticipate their fleet will either remain stable or grow in the next 3 years (with 17% expecting growth, driven by HR needs and business development)

23% include second-hand vehicles, mainly used as pool cars or tool cars



THE GROWTH POTENTIAL OF OPERATIONAL LEASING STABLE IN SWEDEN, ALONG WITH ALREADY STRONG ADOPTION

19% are considering either introducing operational leasing or further increasing it in the next 3 years

46% report operational leasing is their current primary financing method



FLEET ELECTRIFICATION REMAINS STRONG WITHIN SWEDISH FLEETS, DESPITE A DOWNWARD TREND

77% have already implemented electrified technologies or are considering to do so for their passenger car fleets (84% in 2024)

76% consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars, while **88%** have or plan to implement a charging strategy



A CONFIRMED CONNECTIVITY SAY-DO GAP: A HIGH LEVEL OF EQUIPMENT BUT STILL A LIMITED USE OF TELEMATICS DATA

34% have adopted telematics tools (for passenger cars, LCVs or both)

53% equipped use or consider using telematics data, with only 12% already using it to date



A SIGNIFICANT ADOPTION OF MOBILITY SOLUTIONS AND POLICIES, DRIVEN BY CSR POLICIES

31% have already implemented short or mid-term rental or Public transport expense reimbursement or are considering to do so, strengthening their position among the most attractive mobility options for Swedish companies

58% to 61% quote CSR policies among their motivations to implement mobility solutions and policies, followed by HR-related needs (39% to 52%)



CLEAR AWARENESS OF NEED TO DECARBONIZE, IN LINE WITH TOP CHALLENGE OF FLEET ELECTRIFICATION

13% have set targeted decarbonization goals to date (with 23% currently evaluating such goals)

28% quote the adaptation to restrictive public policies on ICE among their main challenges for the next 3 years, closely followed by the promotion of responsible driving (27%).



01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?

For 2025, most Swedish companies remain confident about the future of their fleets

92% of companies anticipate that their fleets will either remain stable or grow over the next three years, with **17%** expecting growth. This represents a slight decrease vs 2024 (96%) to a similar level to 2023 (91%). In comparison, expected growth remains higher across Europe (24%).

This trend is consistent across different company sizes and mostly driven by passenger cars while LCVs could sustain more growth (31%).

Fleet growth is more and more driven by HR-related needs and business development

64% of Swedish companies expecting fleet growth cite HR-related needs, with a significant gap with the European trend (47%). Conversely, this is followed by business development (**59%**), which ranks first in Europe as a whole (73%).

Both criteria have increased by 12 points since 2024 in Sweden.

The potential for second-hand vehicles has yet to be developed

23% of Swedish companies already include second-hand vehicles, a 16-point difference with the European benchmark, and an additional **50%** are considering doing so in the next 3 years, without any significant difference between passenger cars and LCVs.

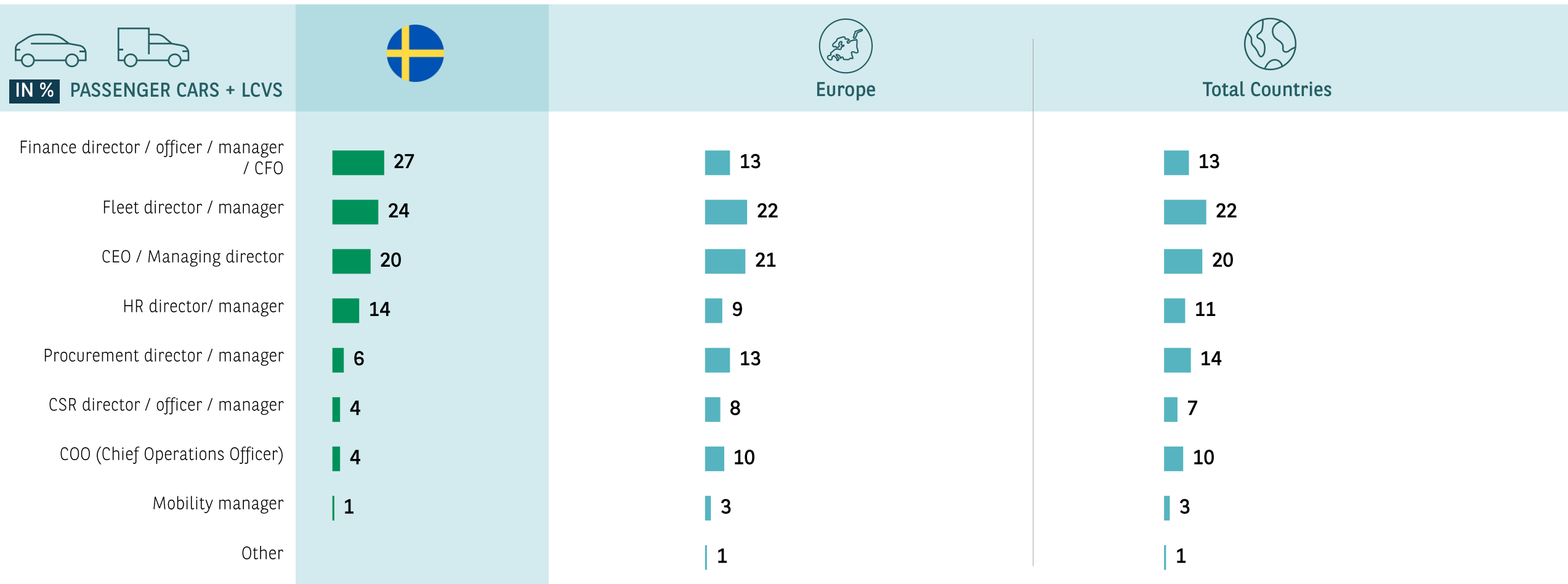
In Sweden, adoption rates increase with company sizes, while consideration is consistent.

In terms of usage, second-hand passenger cars are mainly used as pool cars (92%) and tool cars (77%).

RESPONDENT POSITION

HOW TO READ THE RESULTS ?

In Sweden, 27% of the respondents are Finance director / officer / manager / CFO.

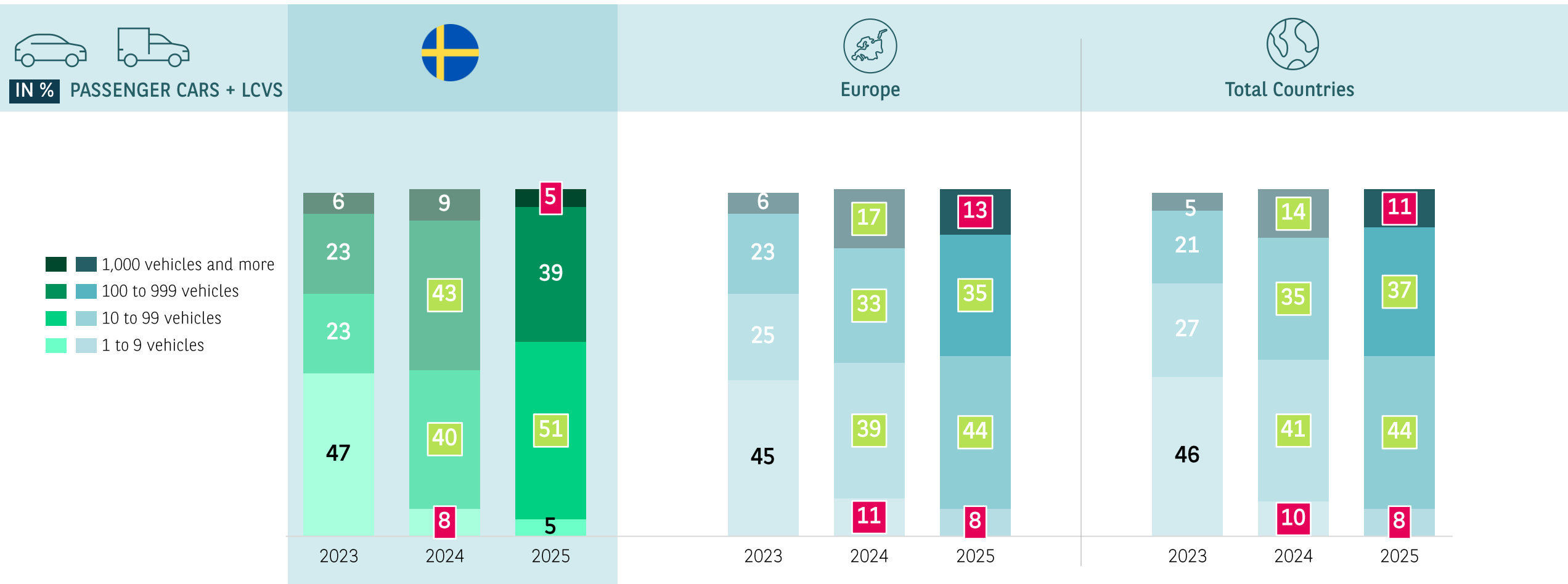


SC5TER. Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Sweden in 2025, vehicle fleets are composed of: 5% with 1-9 vehicles, 51% with 10-99 vehicles, 39% with 100-999 vehicles and 5% with 1,000 or more.



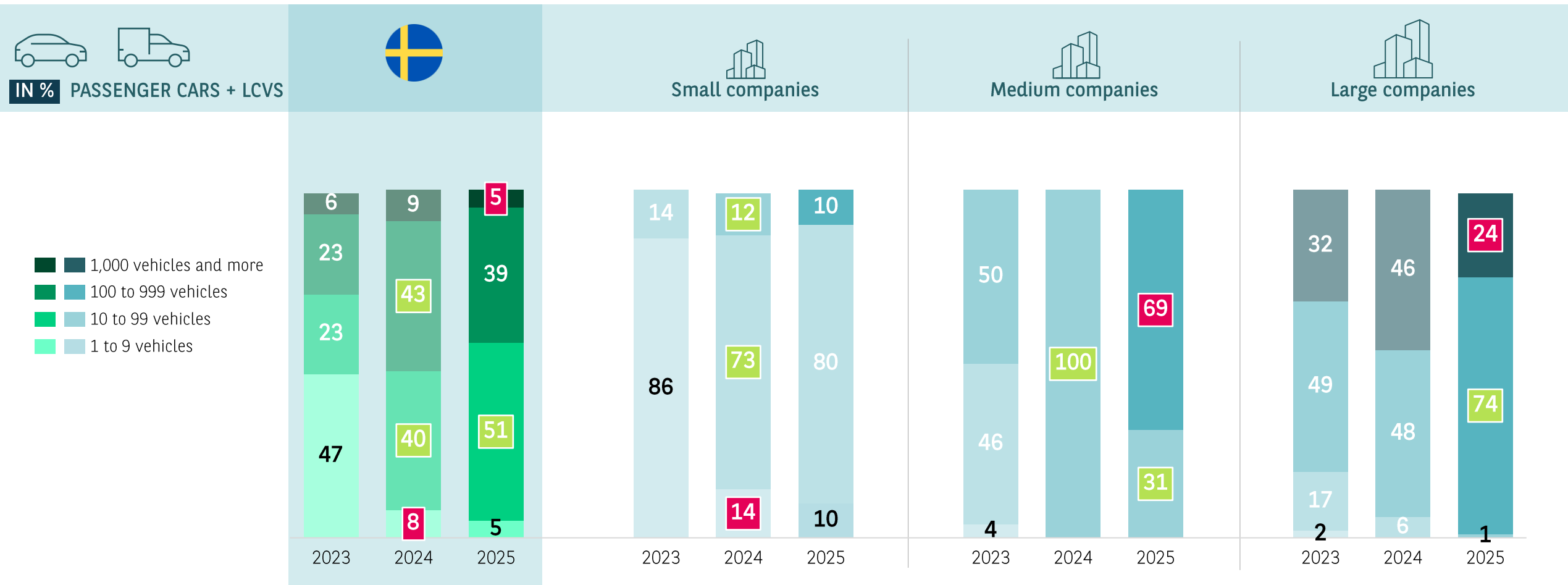
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

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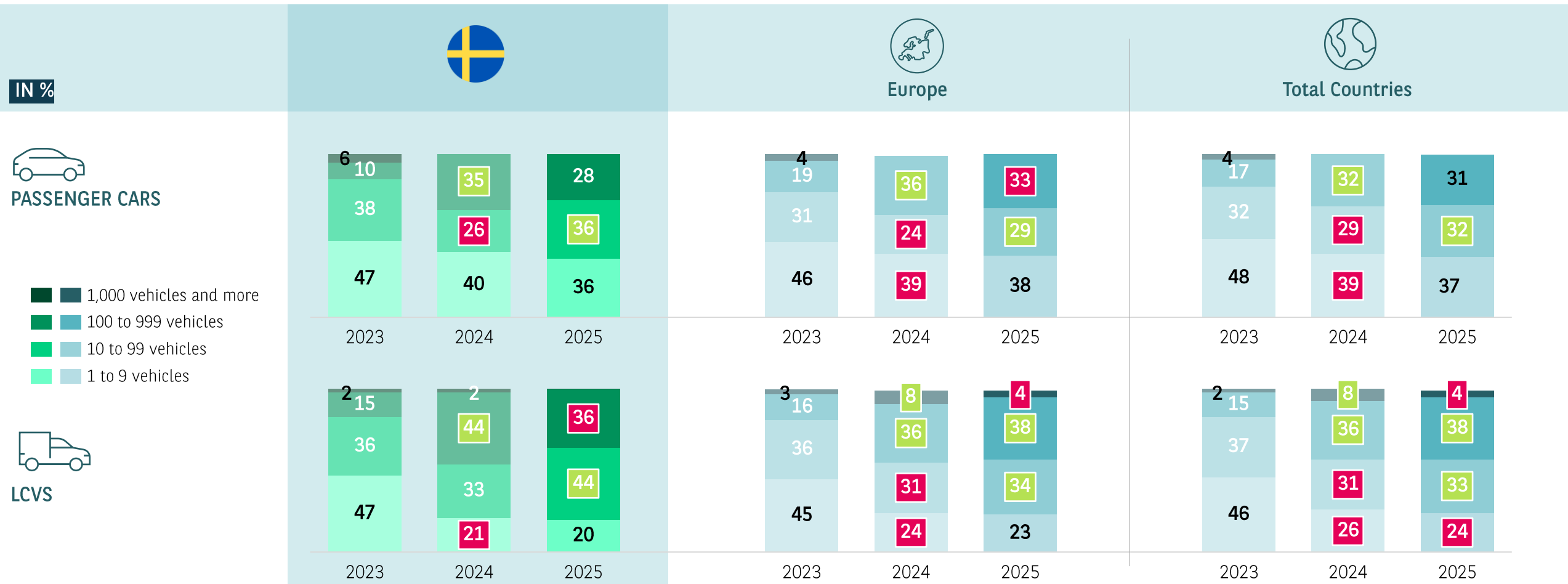
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVs IN FLEETS

HOW TO READ THE RESULTS ?

In Sweden in 2025, passenger car fleets are composed of: 36% with 1-9 vehicles, 36% with 10-99 vehicles, 28% with 100-999 vehicles and 0% with 1000 or more.
And LCV fleets are composed of: 20% with 1-9 vehicles, 44% with 10-99 vehicles, 36% with 100-999 vehicles and 4% with 1,000 or more.



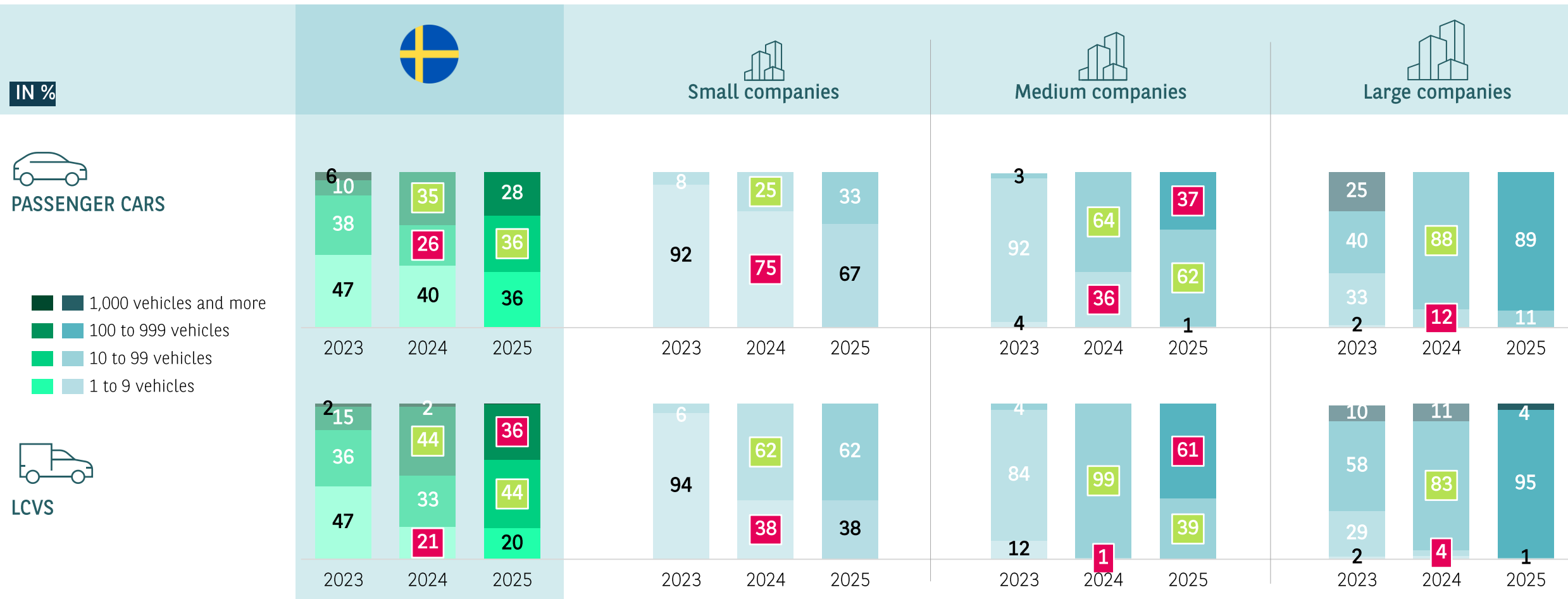
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVs IN FLEETS

HOW TO READ THE RESULTS ?

In Sweden in 2025, passenger car fleets are composed of: 36% with 1-9 vehicles, 36% with 10-99 vehicles, 28% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 20% with 1-9 vehicles, 44% with 10-99 vehicles, 36% with 100-999 vehicles and 1% with 1,000 or more.



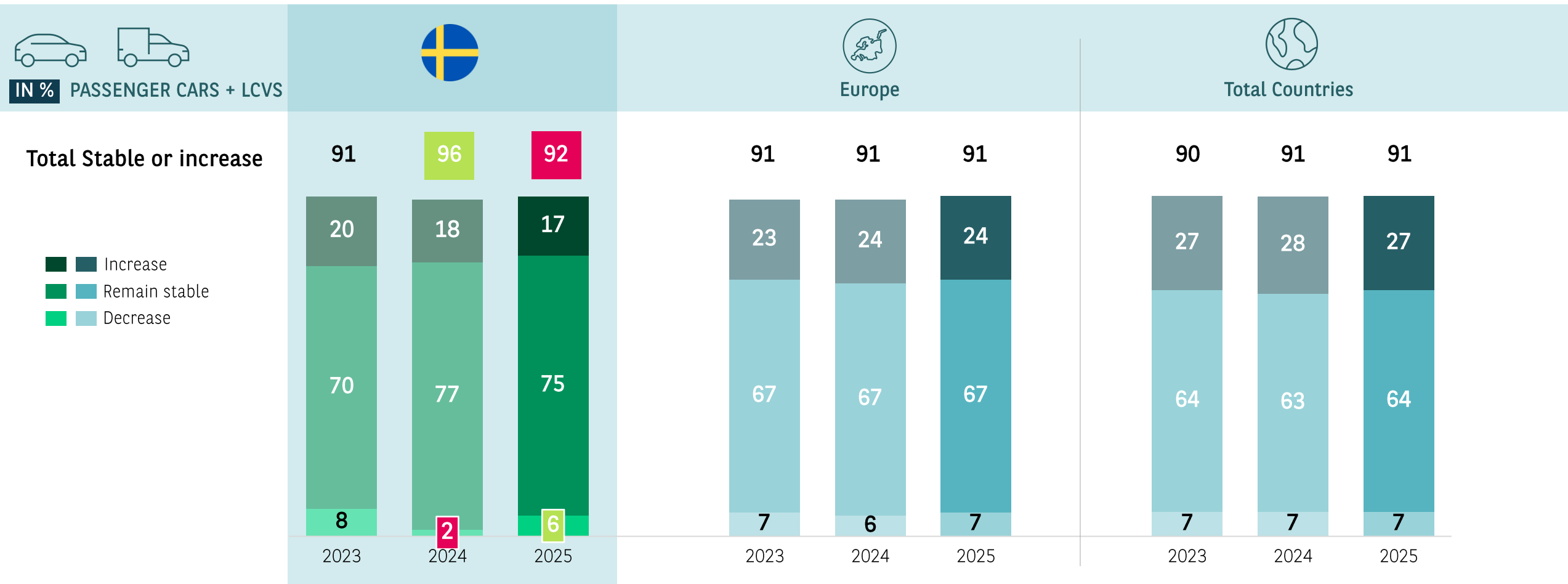
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Sweden in 2025, 92% of the companies expect their fleet to remain stable or to increase in the next 3 years.



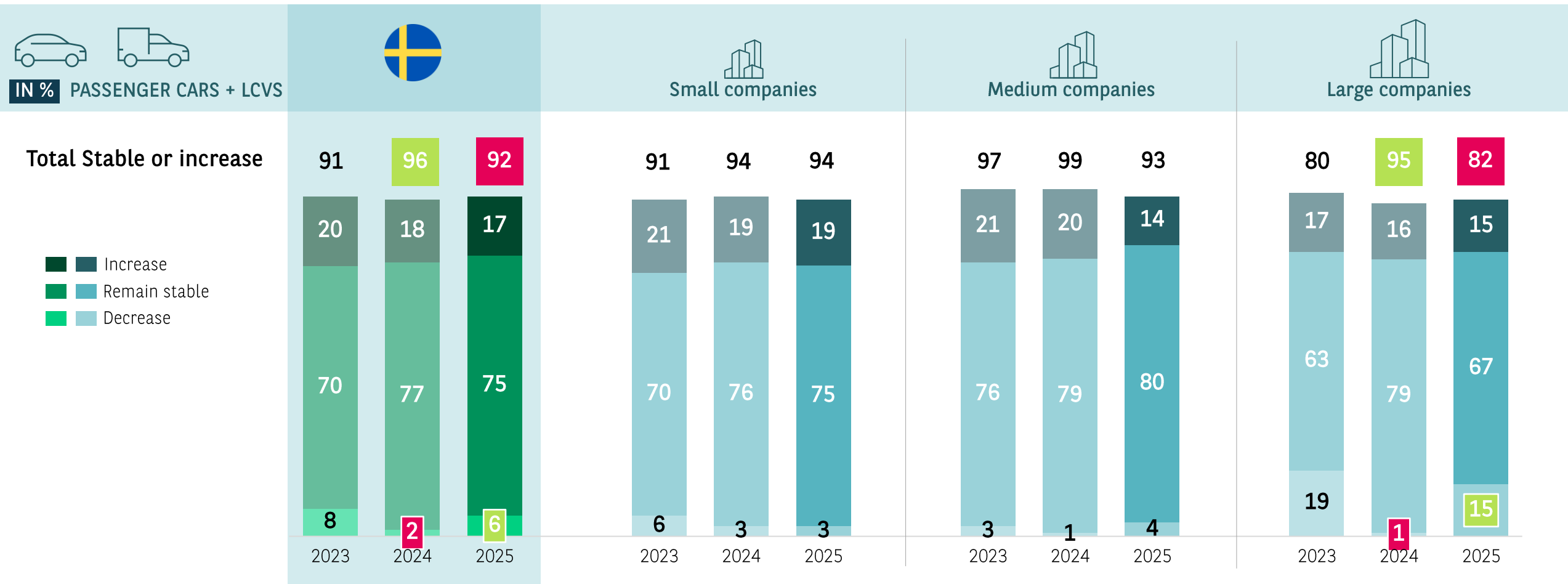
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

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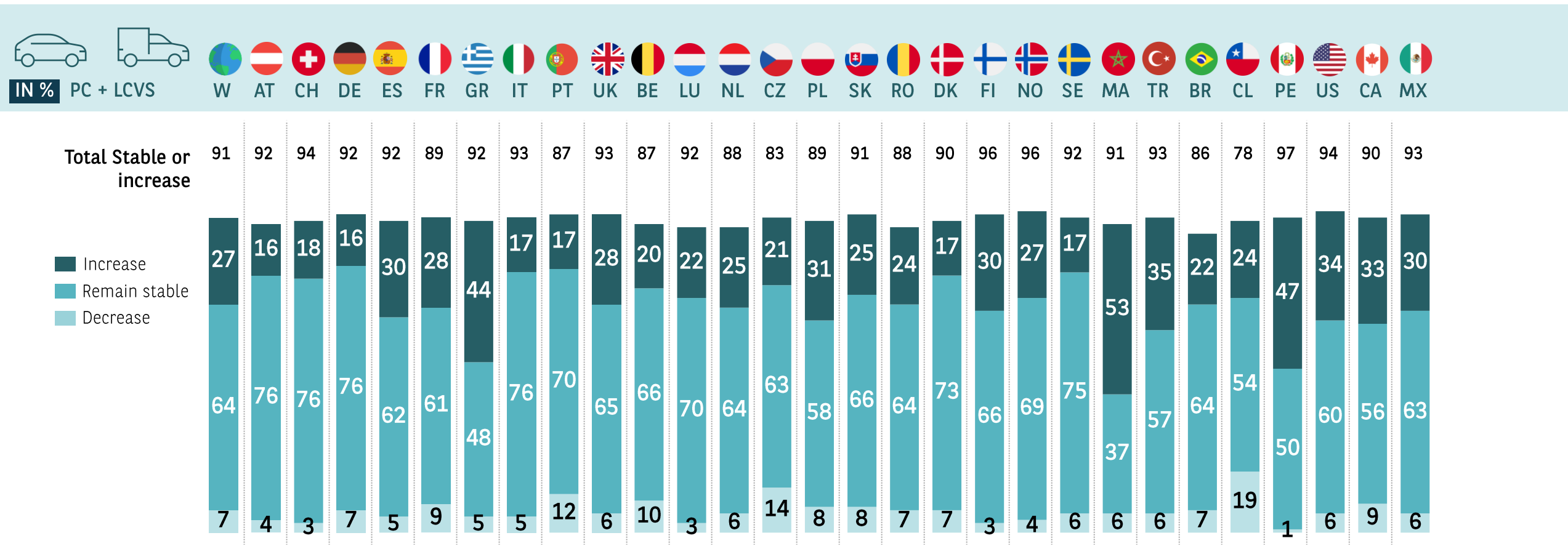
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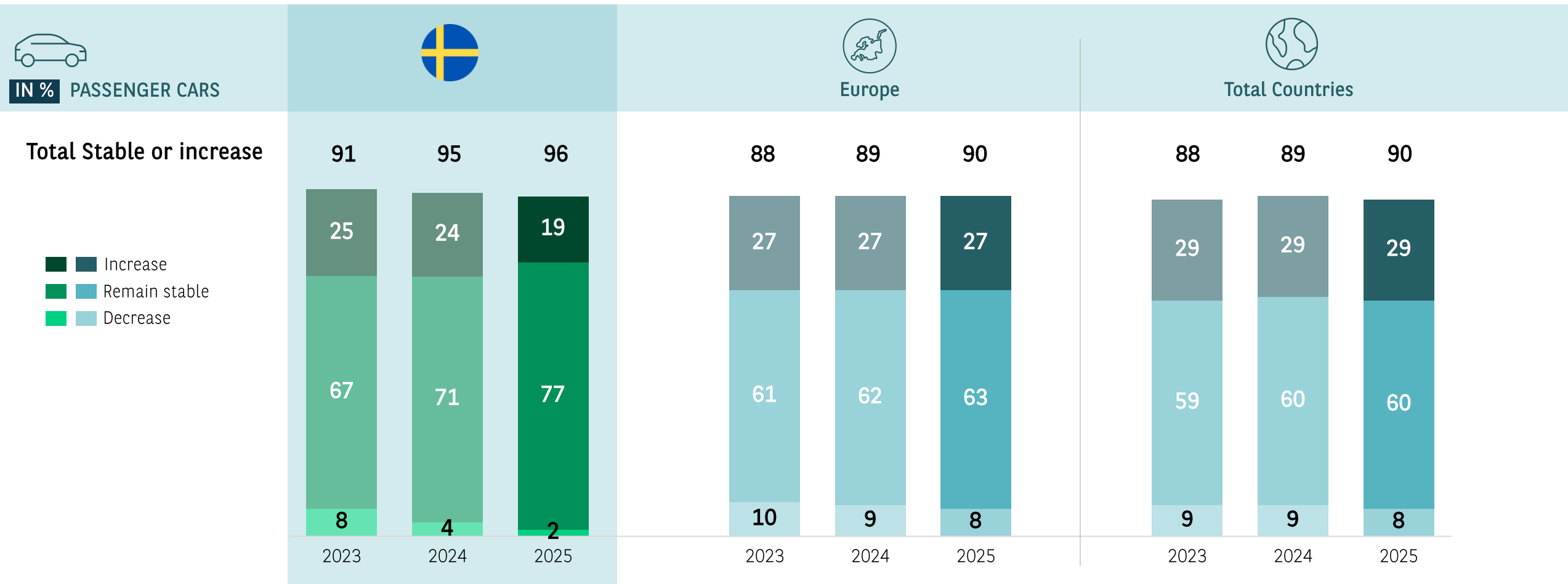


A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Sweden in 2025, 96% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



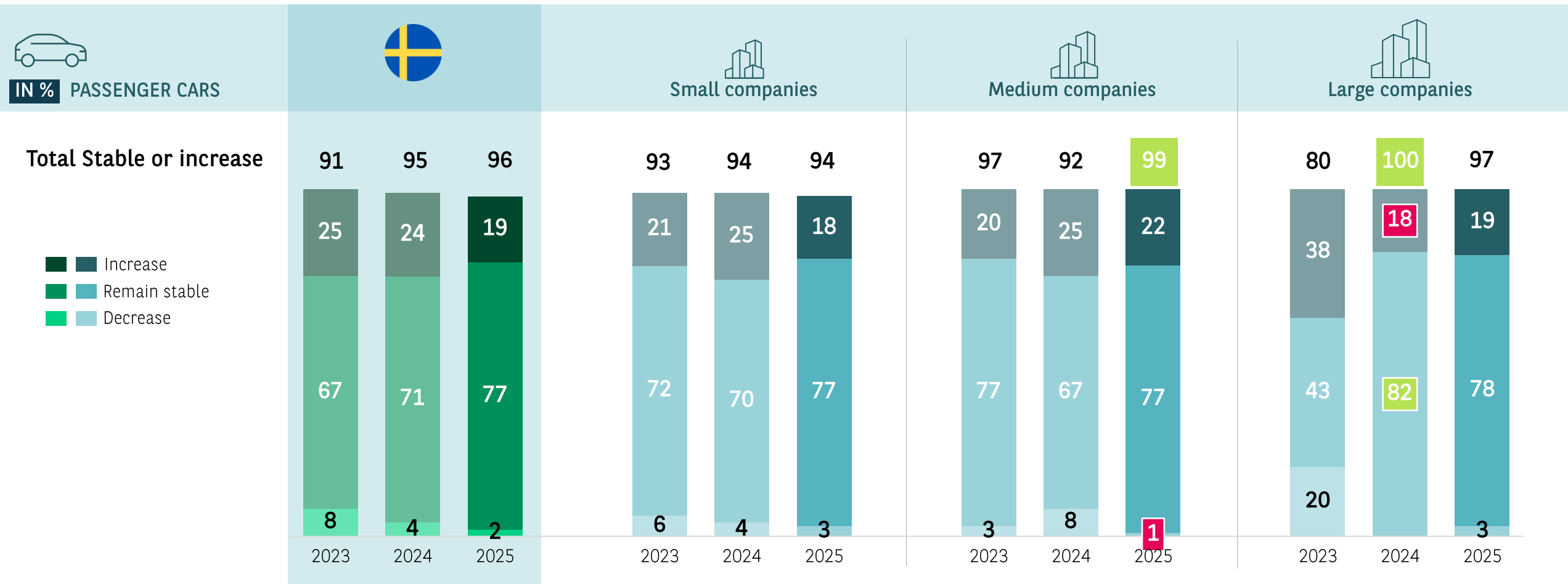
A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

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In Sweden in 2025, 96% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



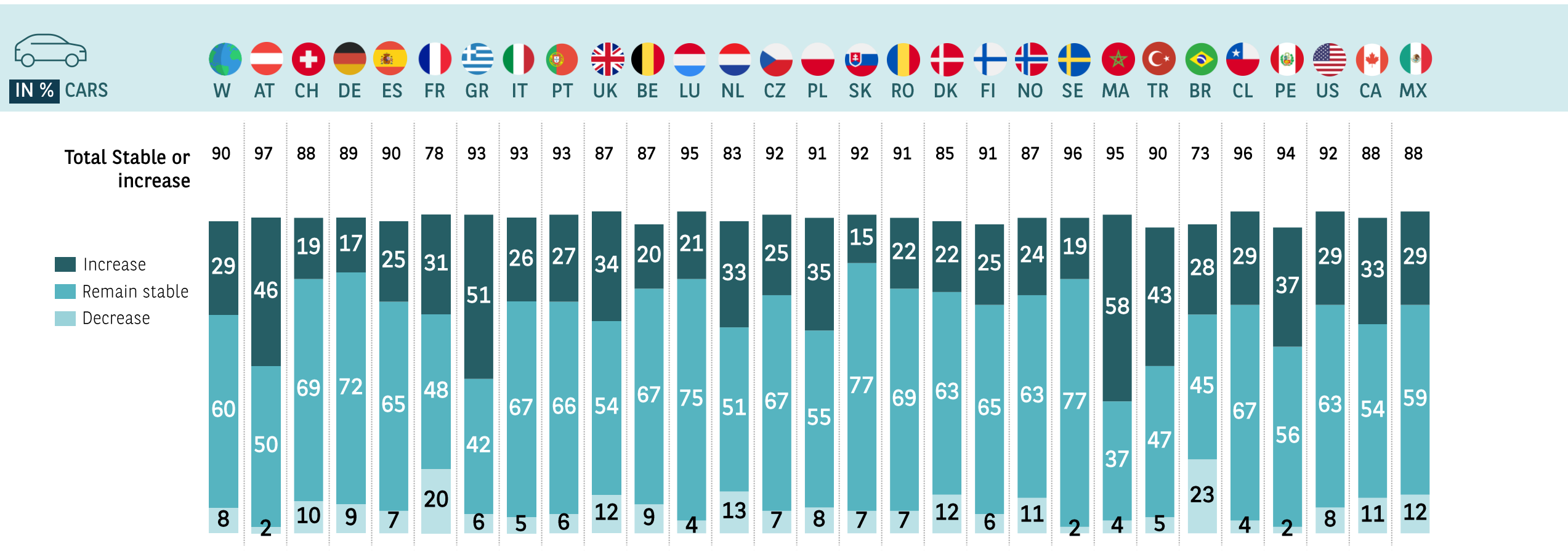
A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Sweden in 2025, 96% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.

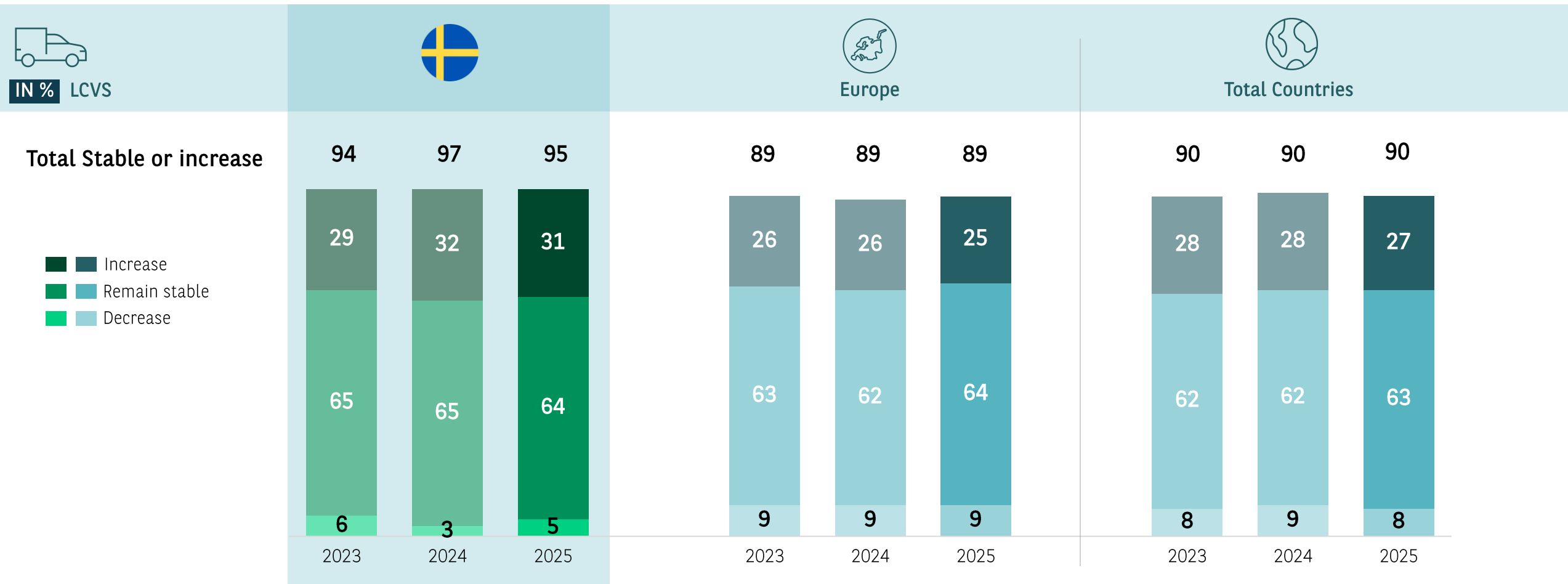


A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Sweden in 2025, 95% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



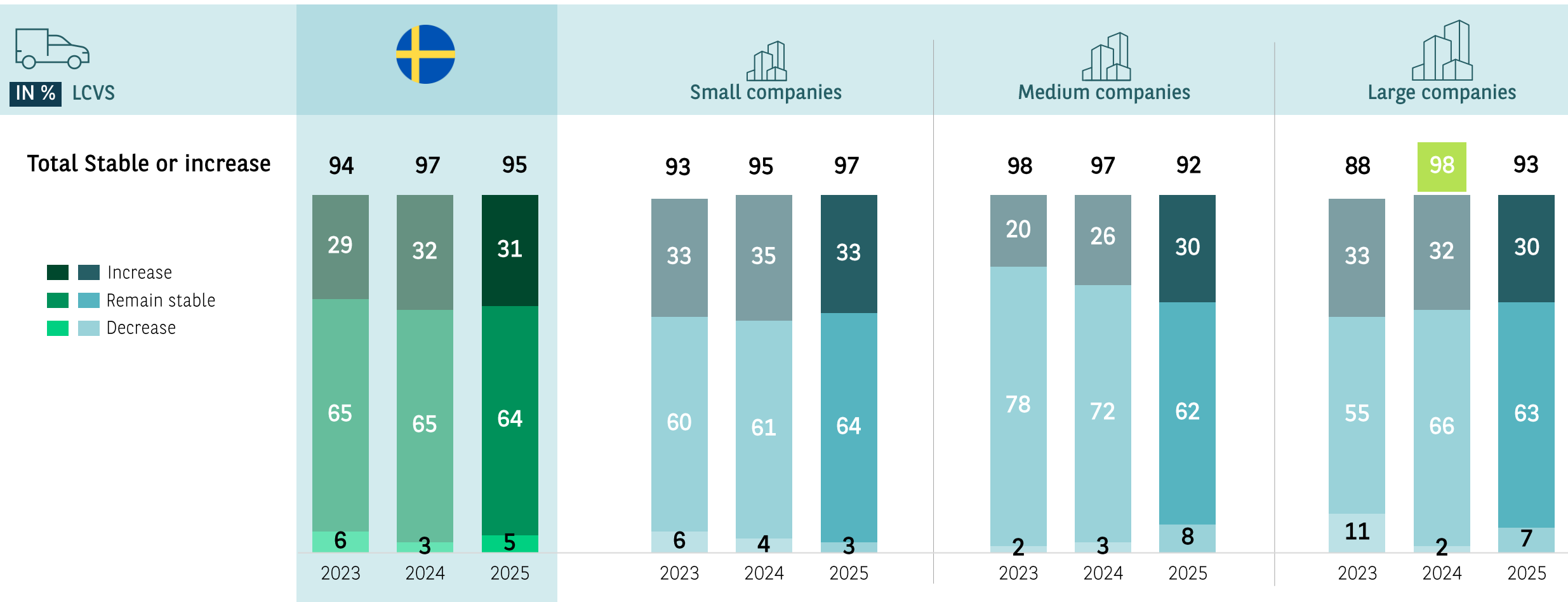
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Sweden in 2025, 95% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



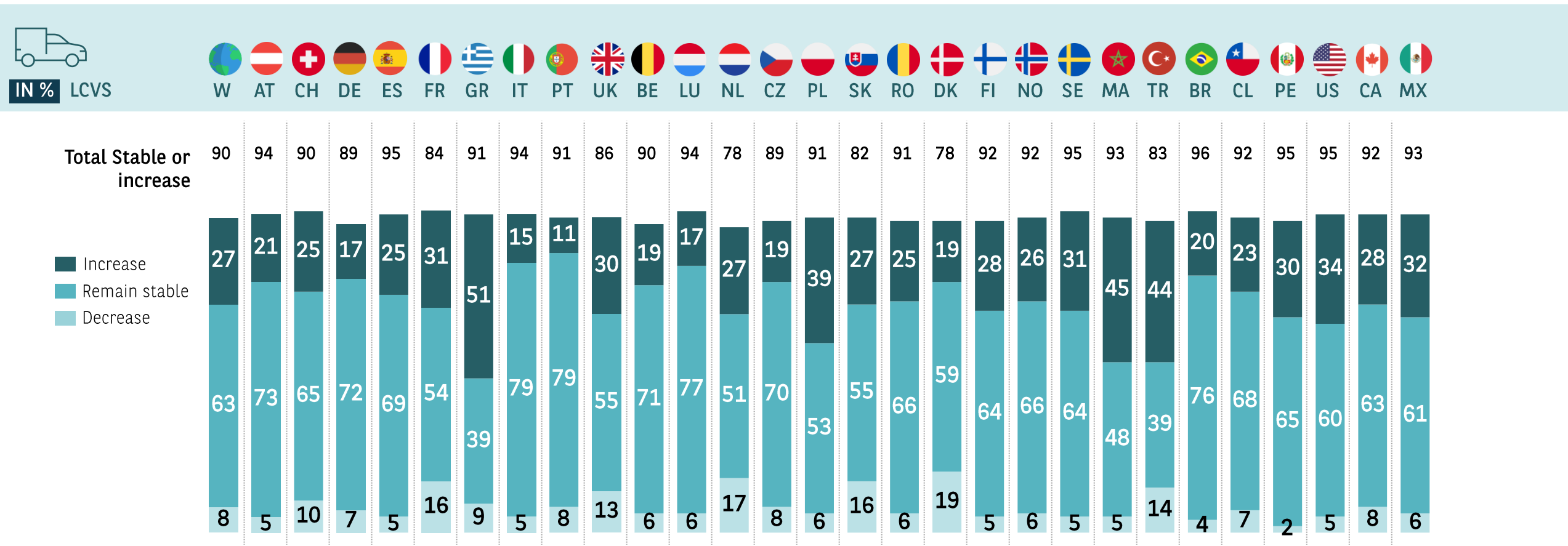
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

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In Sweden in 2025, 95% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

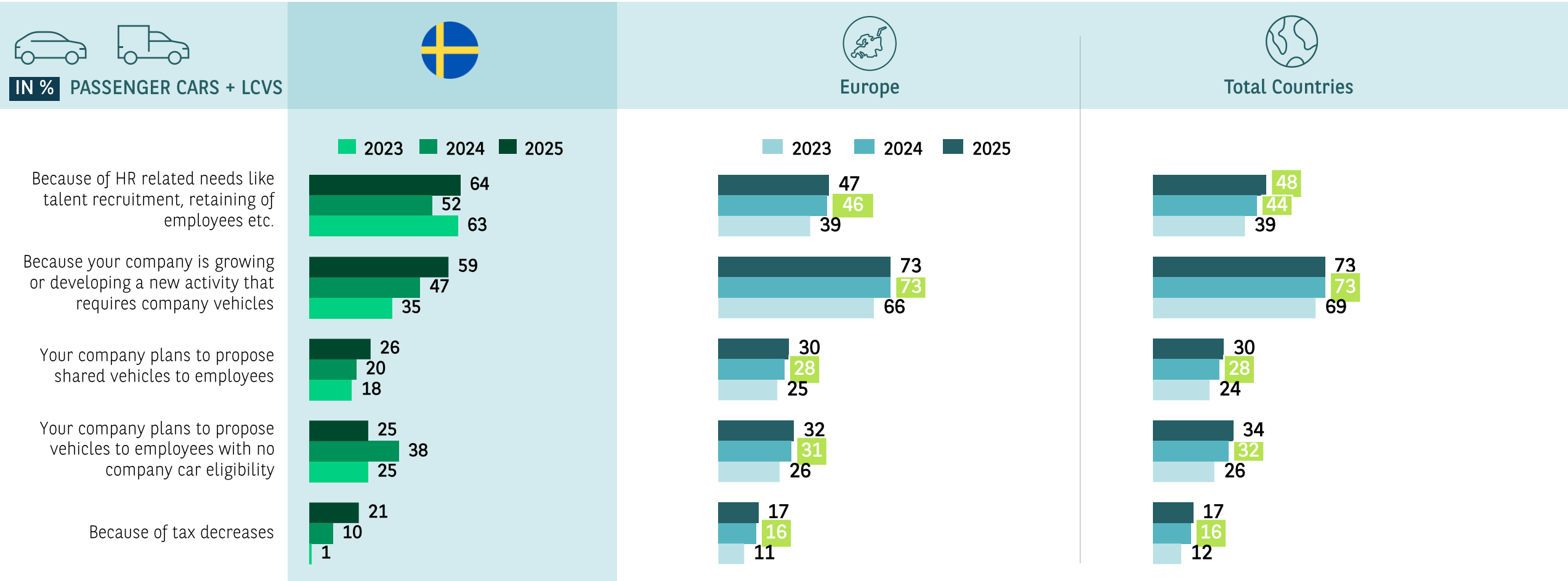


A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

REASONS FOR FUTURE FLEET INCREASE

HOW TO READ THE RESULTS ?

In Sweden in 2025, 64% of the companies expecting an increase of their fleet explain it by: Because of HR related needs like talent recruitment, retaining of employees etc..

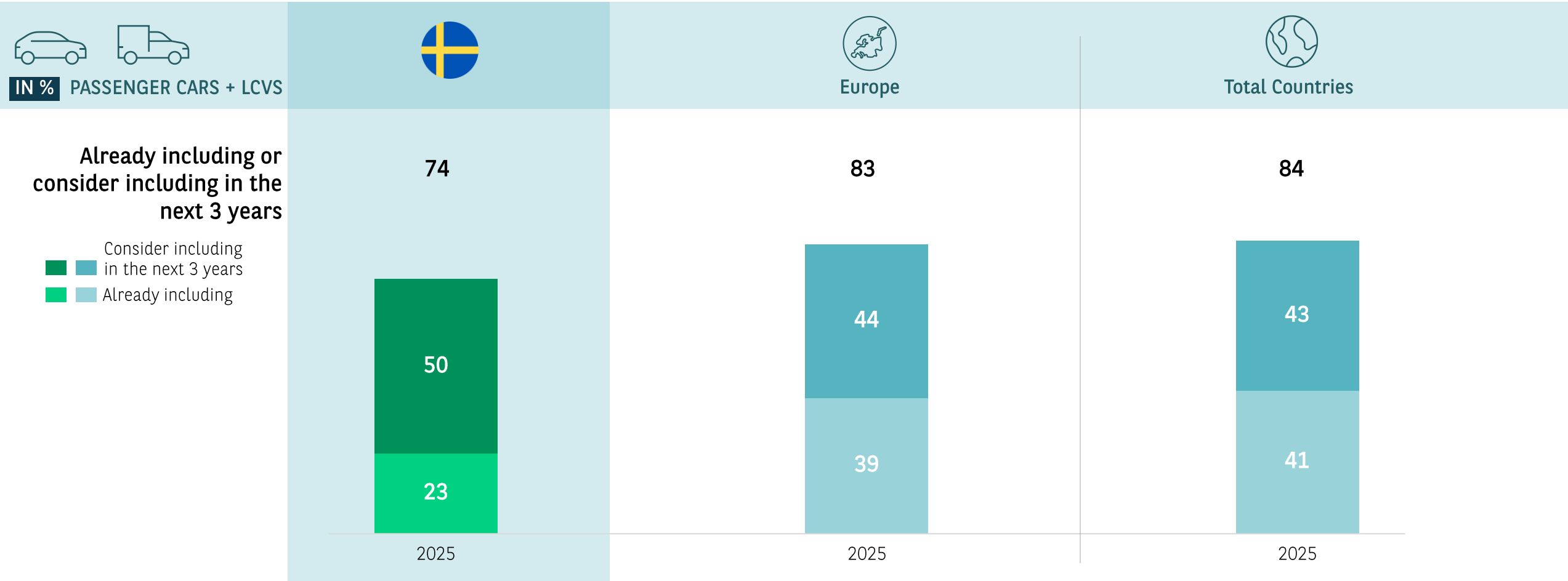


A8A. Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

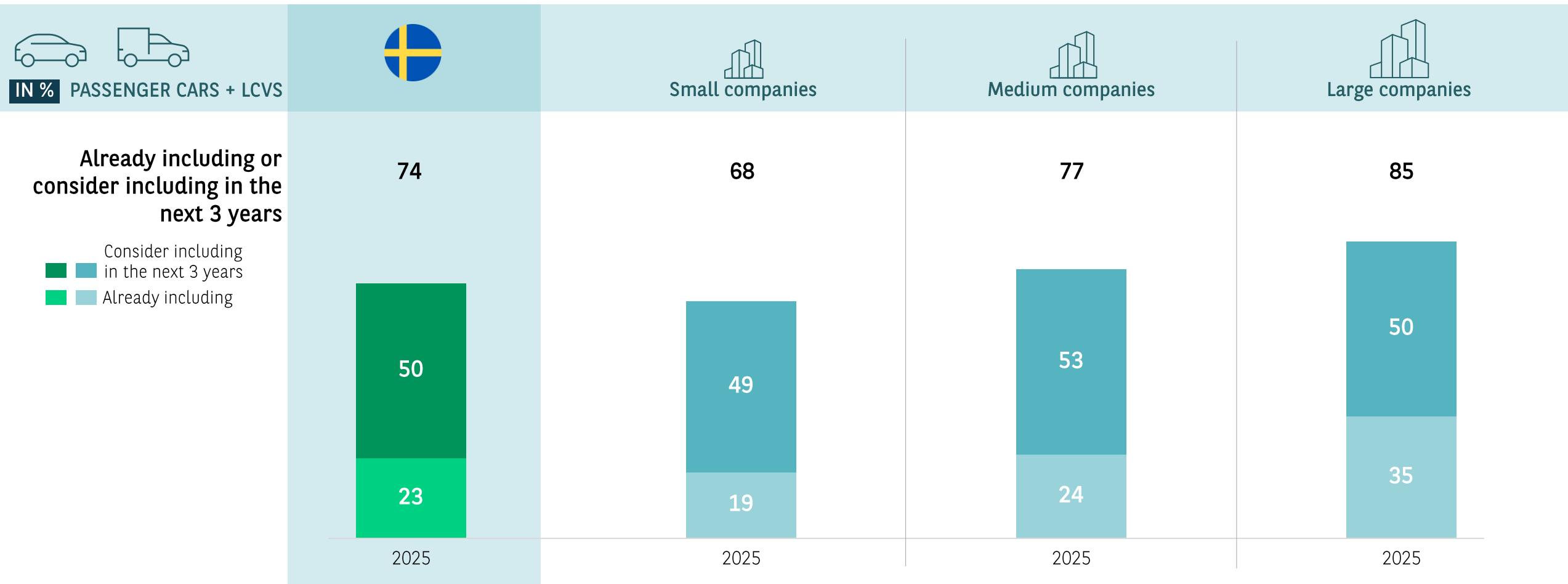
In Sweden in 2025, 74% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

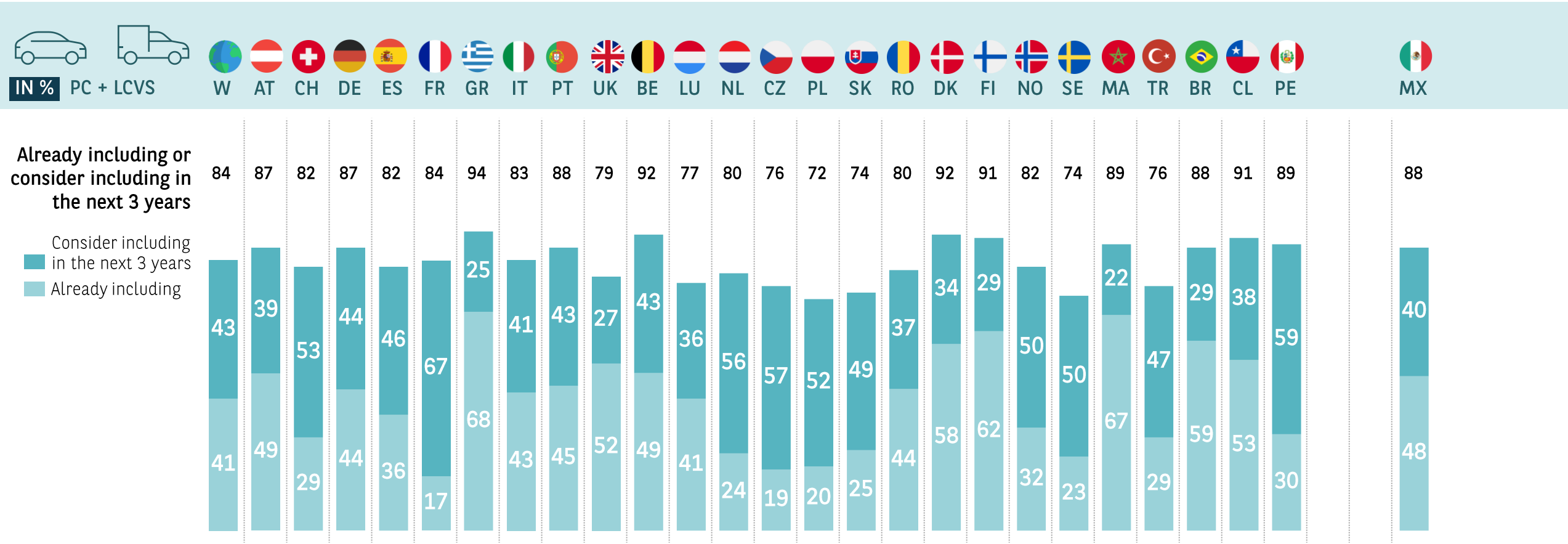
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A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Sweden in 2025, 51% of the companies are already including or are considering including passenger cars that were not new when acquired.
47% of the companies are already including or are considering including LCVs that were not new when acquired.



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Sweden in 2025, 51% of the companies are already including or are considering including passenger cars that were not new when acquired.
47% of the companies are already including or are considering including LCVs that were not new when acquired.

IN %



Already including or consider including in the next 3 years



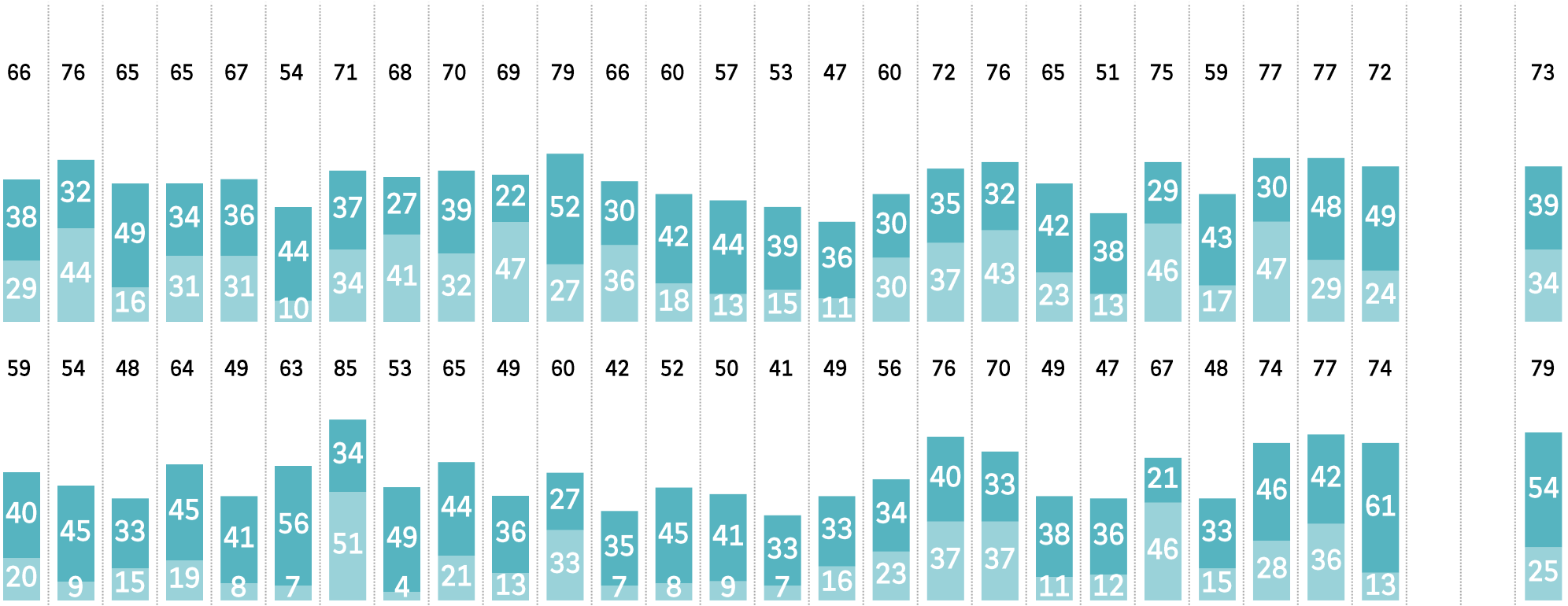
PASSENGER CARS

Consider including in the next 3 years
Already including

Already including or consider including in the next 3 years



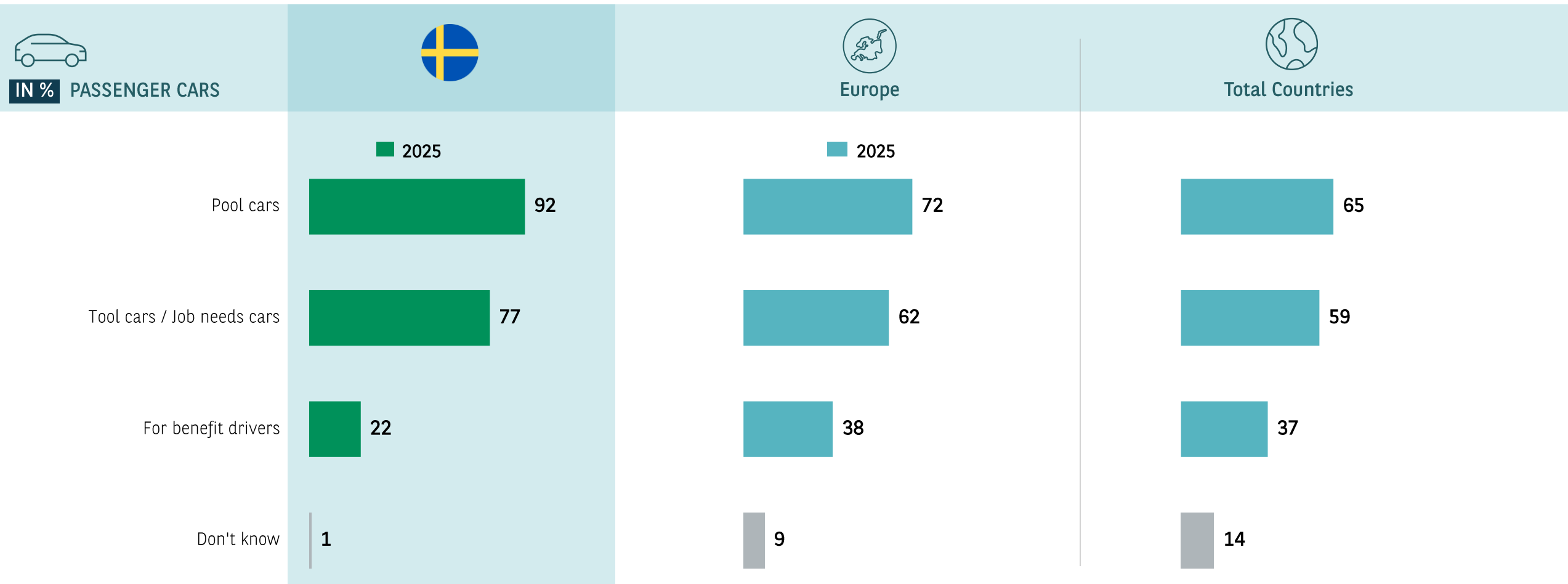
LCVS



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Sweden in 2025, 92% of the companies that are already including used passenger cars are using them as Pool cars.



A15. Considering the passenger cars that were, or will be, not new when acquired: for which type(s) of use?
Basis: Basis: companies with used passenger cars

02

FINANCING METHODS

How do companies finance their fleets?



Operational leasing / Full-service leasing remains used as the main financing method by almost half of Swedish companies

46% of Swedish companies use Operational leasing as main financing method for their fleets (stable compared to 2024), below ahead Financial leasing (30%) and Outright purchase (14%).

These penetration rate of Operational leasing is consistent across company sizes with a significant gap compared to the European benchmark (27%).

The potential for growth in Operational leasing / Full-service leasing remains stable vs 2024

19% of Swedish companies are still considering either introducing full-service leasing or expanding it within their fleet financing strategies, vs 36% for the European average.

This interest remains at the same level for all Swedish companies, whatever their size.

Swedish fleet managers could be looking for more flexibility before price competitiveness

21% of Swedish companies cite flexibility as the criterion their current leasing partner is lacking the most, ahead of competitive pricing (16%).

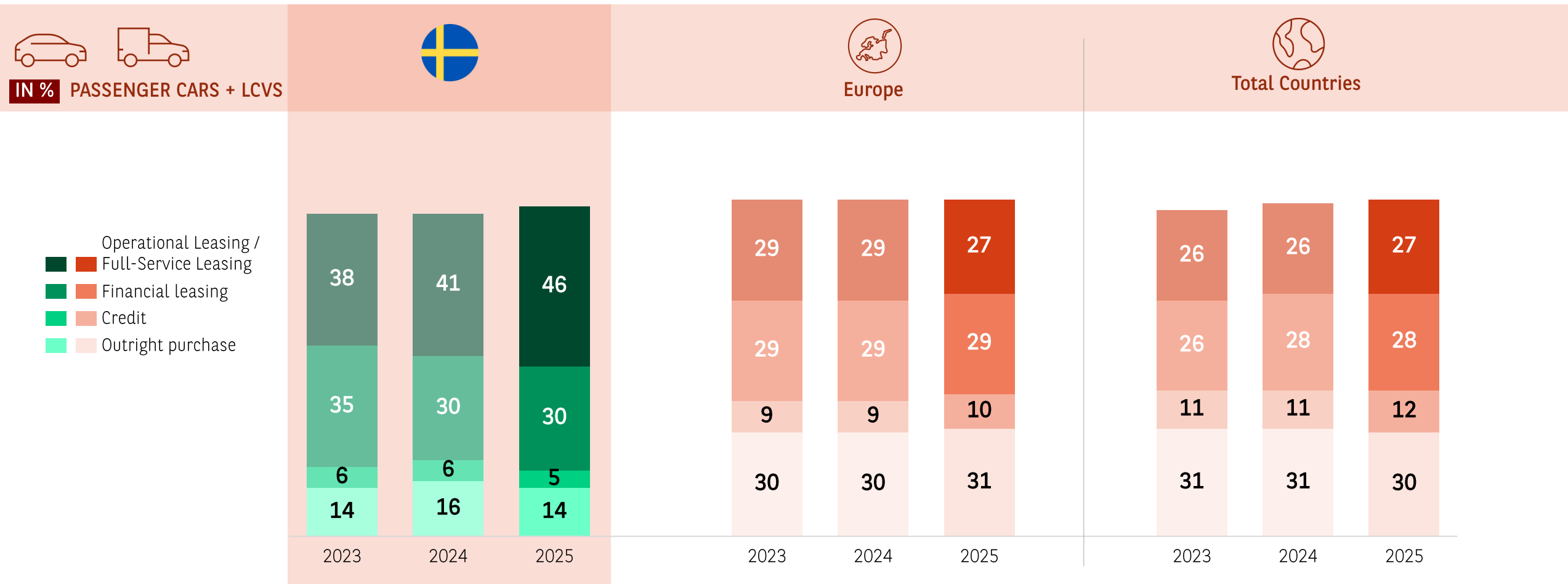
Fixed monthly rental and the release of capital into the business clearly seen as Operational Leasing added values

2 main added values of Operational Leasing are emerging: fixed monthly rental (36% ; +11 points vs 2024), and the release of capital into the business (33% ; + 9 points).

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 46% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.



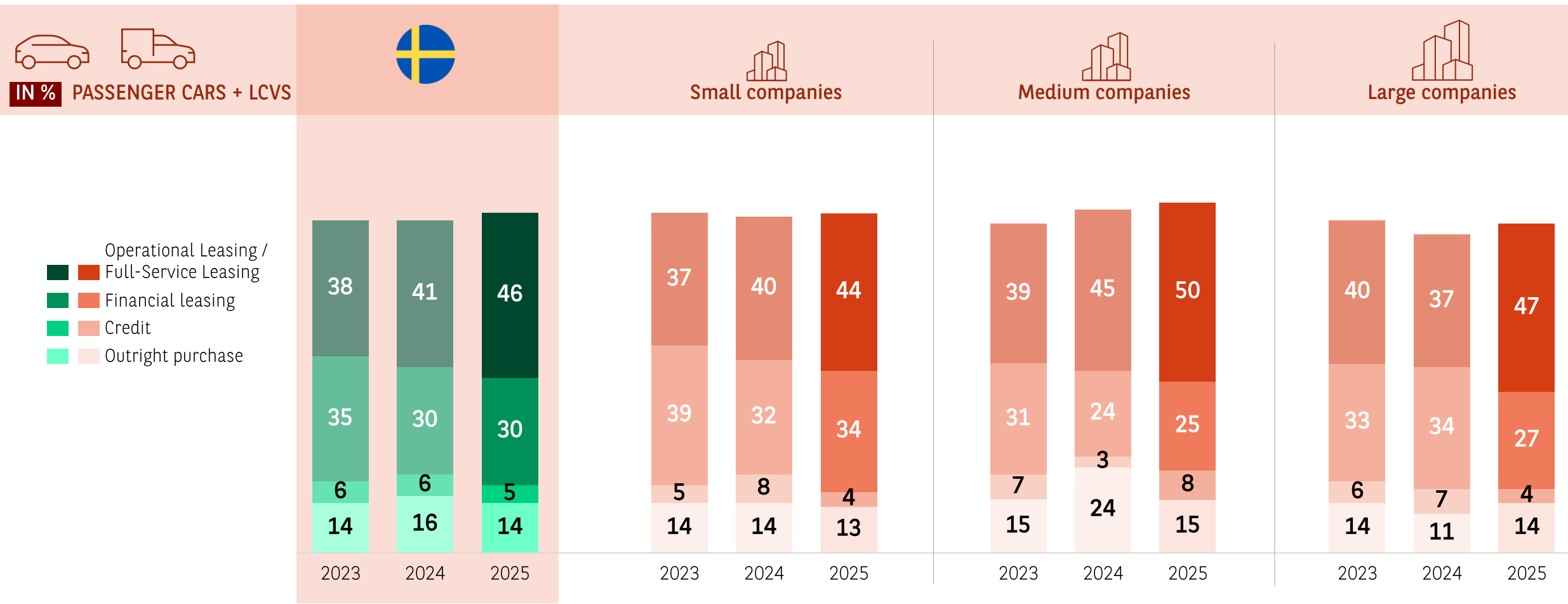
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 46% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.



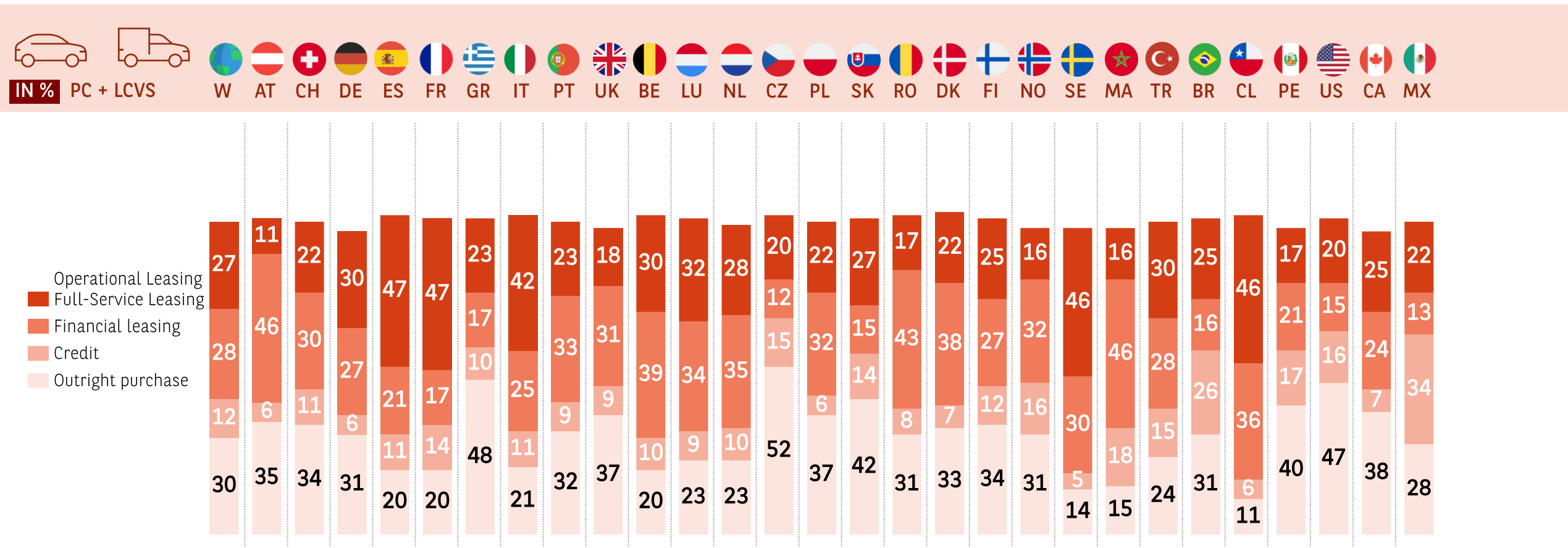
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MAIN FLEET FINANCING METHOD

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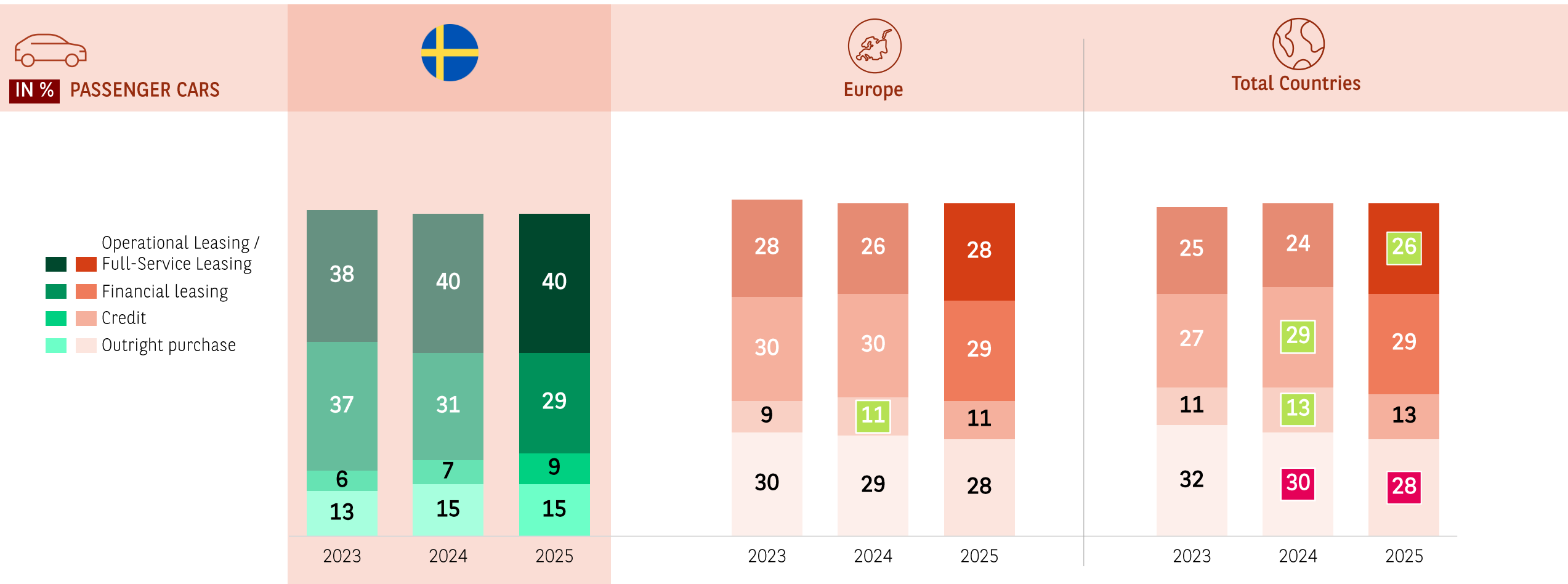


B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 40% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



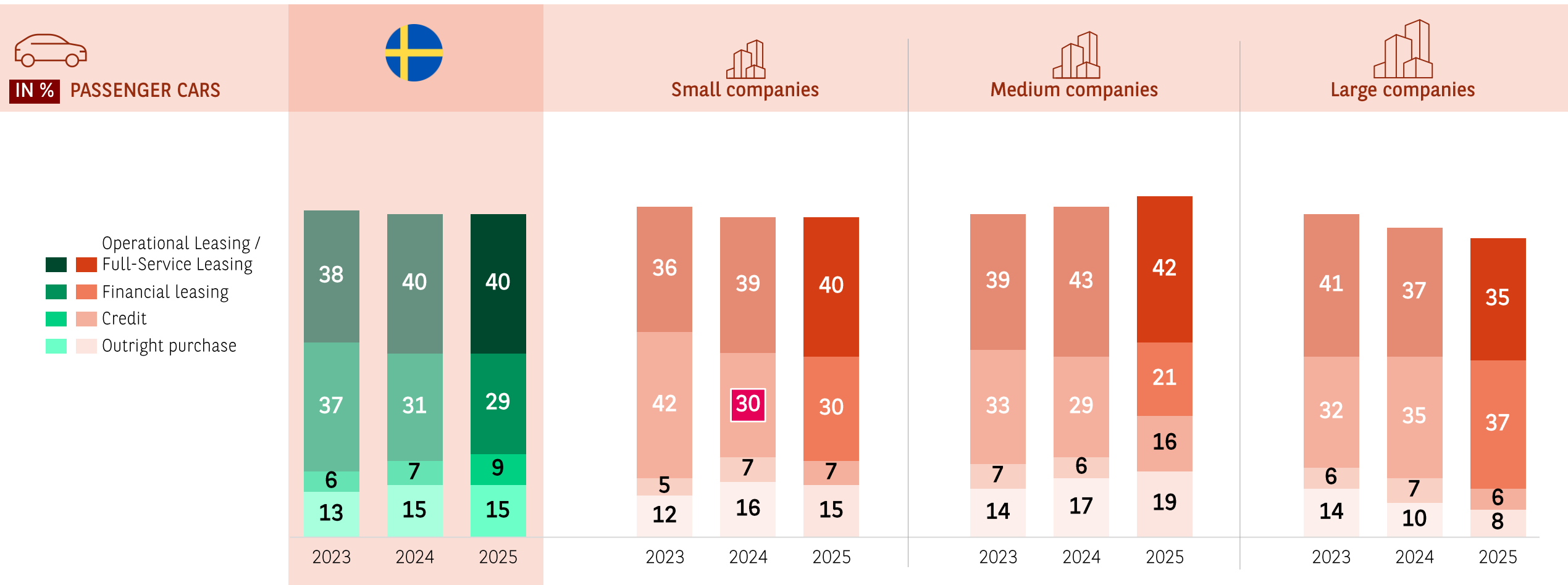
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 40% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

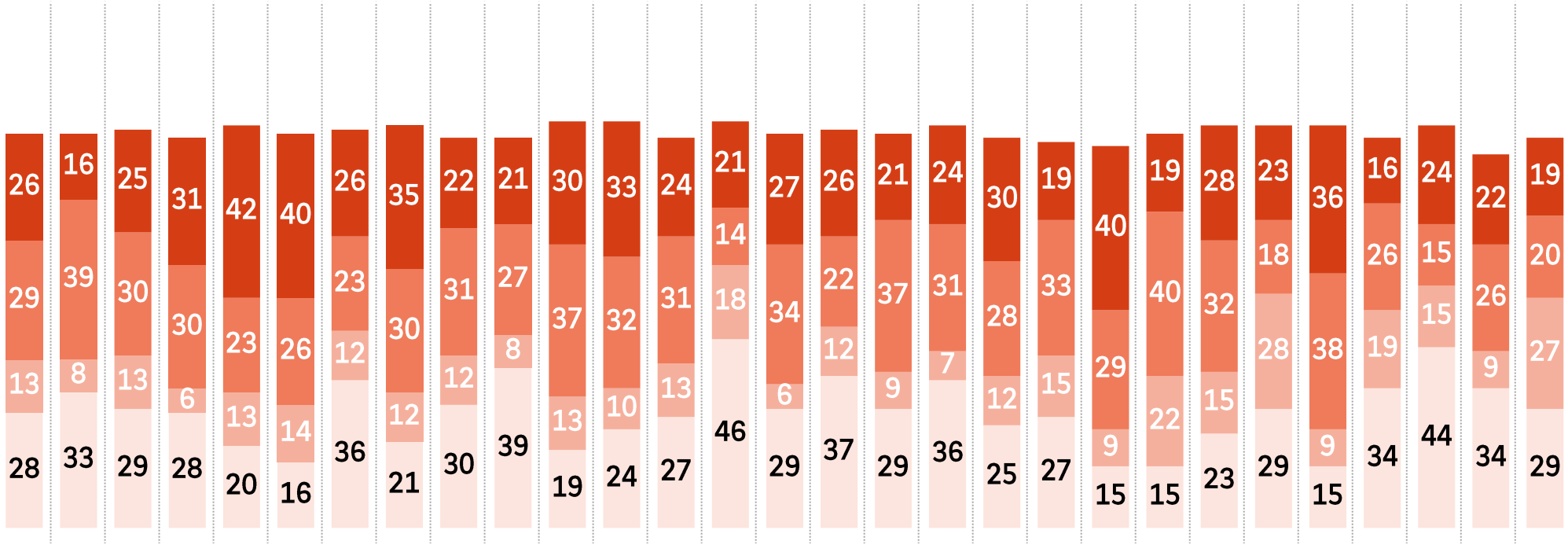
In Sweden in 2025, 40% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



IN % CARS



- Operational Leasing
- Full-Service Leasing
- Financial leasing
- Credit
- Outright purchase

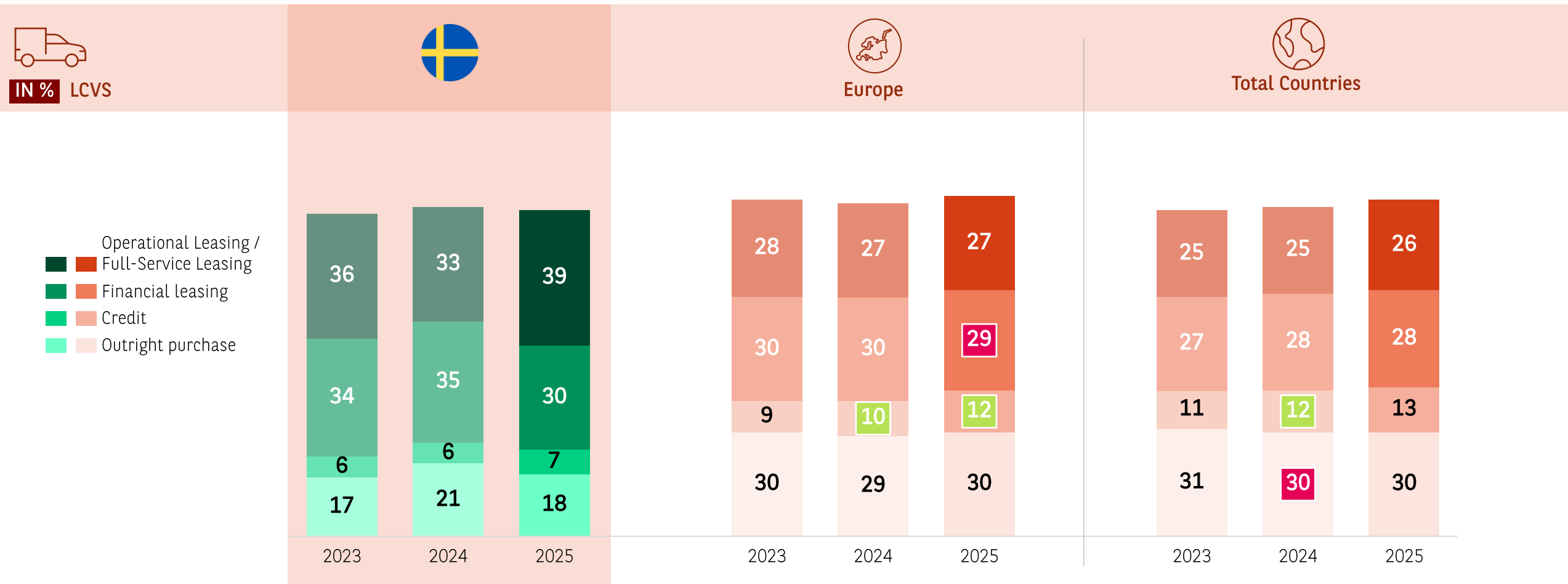


B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 39% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



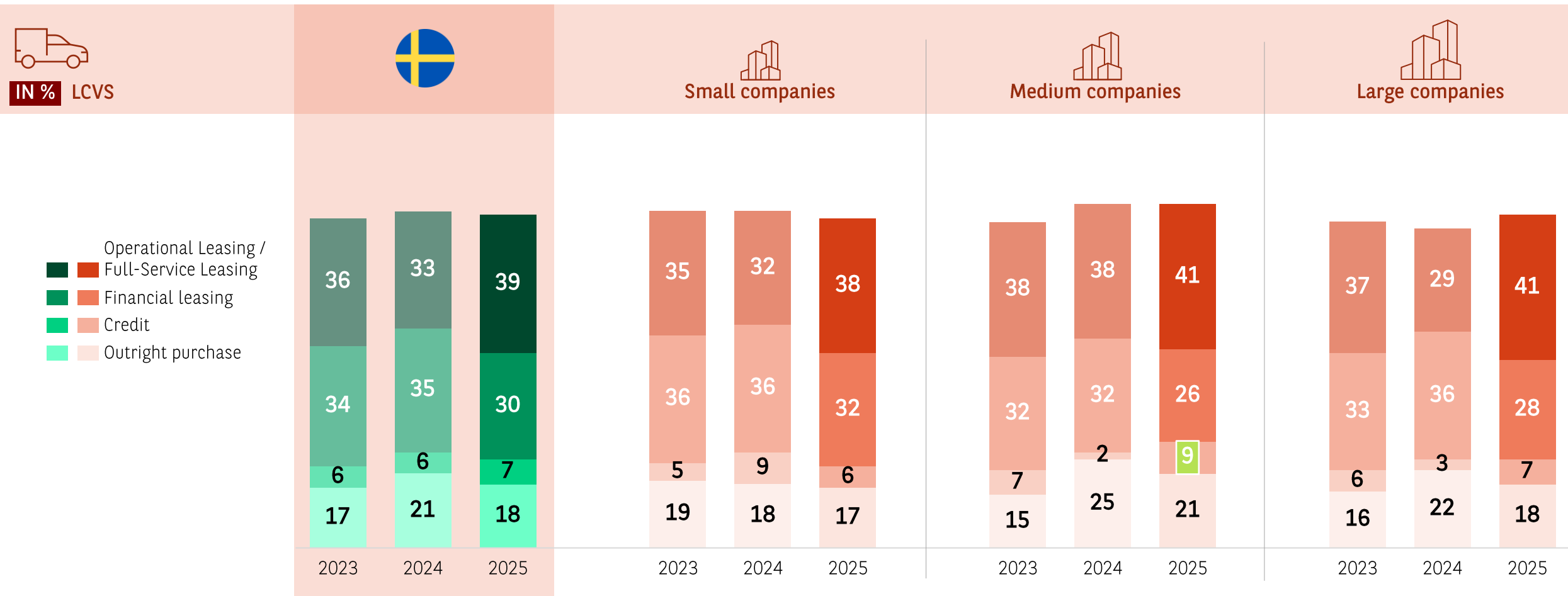
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 39% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

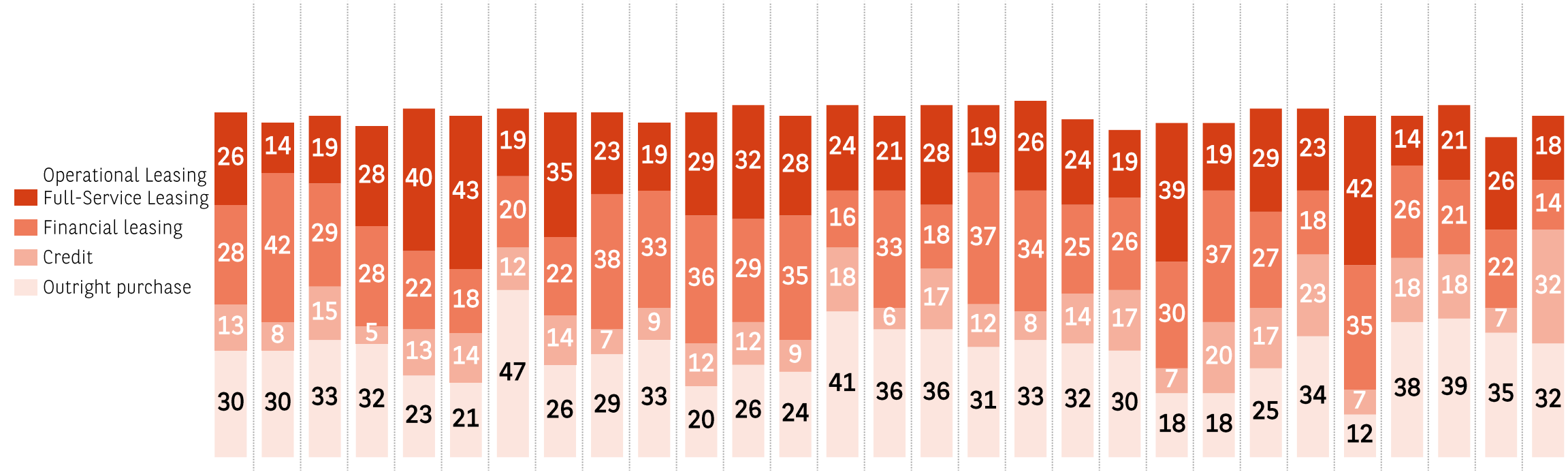
MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Sweden in 2025, 39% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



IN % LCVS

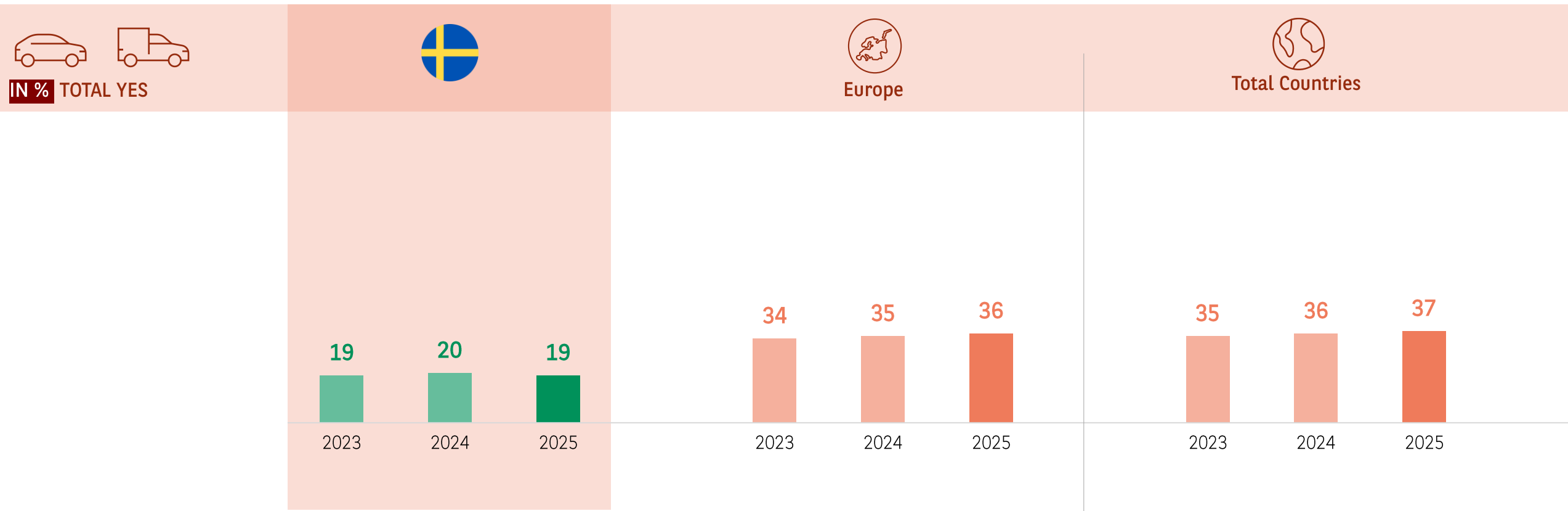


B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Sweden in 2025, 19% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



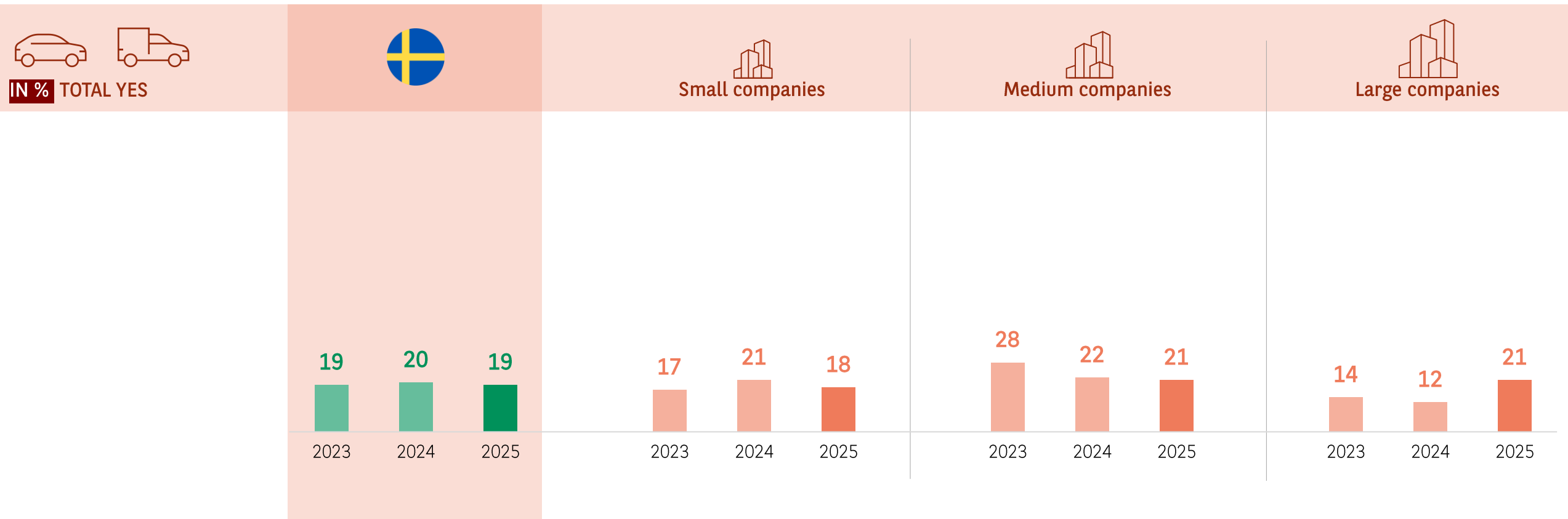
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Sweden in 2025, 19% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



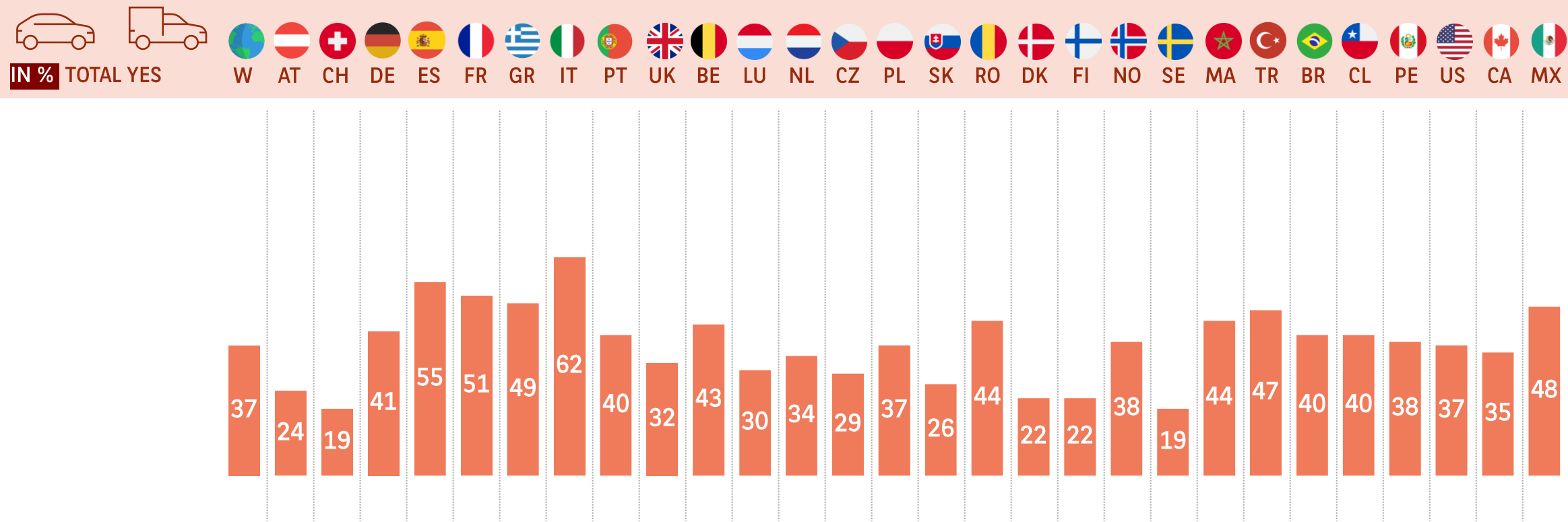
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
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X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Sweden in 2025, 19% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



B8bis. In the next three years do you intend to either introduce or increase the use of Operational leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

The two features that are most lacking in current leasing partner are: Flexibility for 21% of the companies and Competitive pricing for 16% of the companies.

Local question

IN %



SW20ab. What two features do you find most lacking in your current leasing partner?
Basis: companies with corporate vehicles = 100%

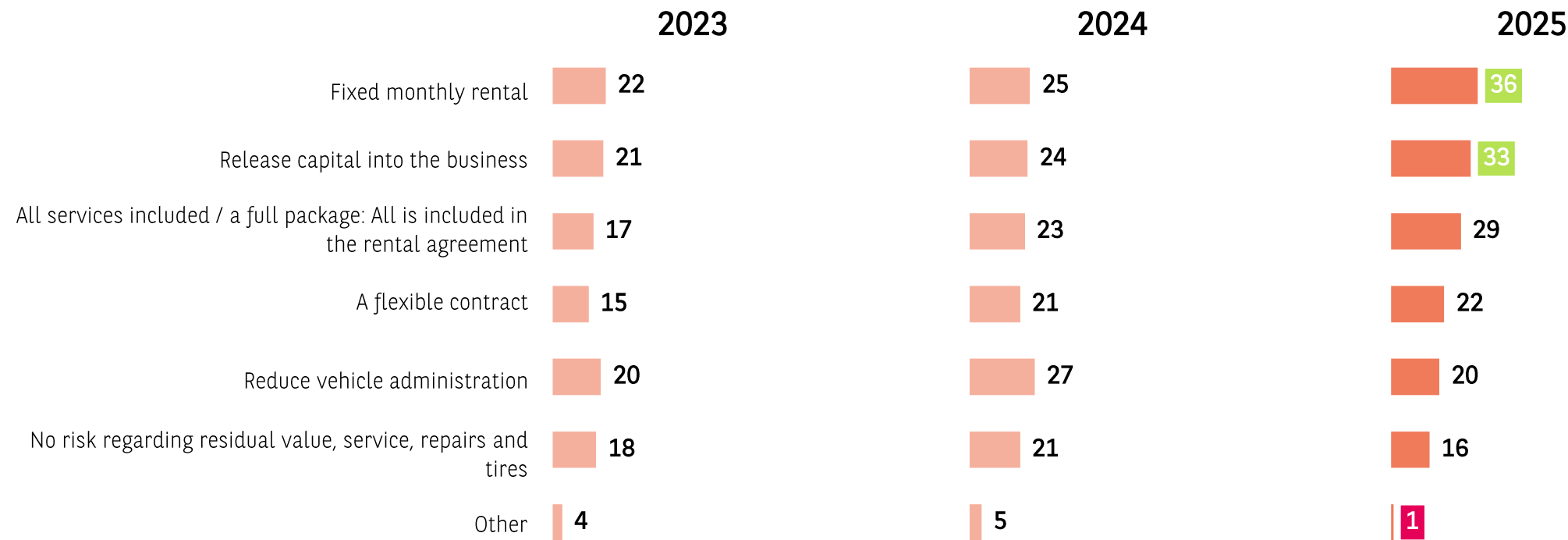
THE 2 MAIN ADDED VALUES OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In 2025, the 2 main added values of Operational Leasing are: Fixed monthly rental for 36% of the companies, and Release capital into the business for 33% of the companies.

Local question

IN %



SW20c. According to you, what are the 2 main added values of Operational Leasing for company vehicles?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

03

ENERGY MIX

**What energy technologies are used?
What changes are to be expected in the
near future?**



Swedish companies reducing implementation of energy technologies in their passenger cars fleets

In 2025, **77%** of Swedish companies have implemented at least one electrified technology (HEV, PHEV or 100% BEV) for passenger cars, a 7-point decrease compared to 2024 record (84%), mostly driven by smaller companies (73%). In Sweden, implementation is still stronger than the European average (56%). When considering future plans for adoption, this figure remains stable: 88% in Sweden, vs 75% for Europe.

Alternative energy technologies on the decline

Adoption of PHEV (**47%** ; vs 59% in 2023), BEV (**37%** ; vs 47%) and hybrid (**31%** ; vs 40%) have now followed a decrease trend for the last two years.

The lower environmental impact is the main reason for adopting alternative fuel technologies within passenger car fleets

49% of Swedish companies report that environmental impact remains the primary motivator for their transition to electric passenger cars, maintaining the gap with other European countries (36%).

Compliance with CSR policy and fuel expenses reduction (both at 37%) are also key reasons.

The shift for electrified LCVs fleets remains complicated

The adoption of battery electric vehicles (BEVs) within light commercial vehicle (LCV) fleets also records a drop (**16%** in 2025 vs 23% in 2024), in line with the downward trend observed in other European markets. However, the consideration, also decreasing in Europe in 2025, has quite maintained in Sweden over the last two years.

Overall, the main obstacle to wider adoption of electric vehicle fleets is insufficient charging infrastructure

76% to **74%** of Swedish companies mention charging points limitations as a constraint for using electric passenger cars and LCVs, especially public charging points compared to the European market.

As a result, developing charging both at company premises and at employees' homes are priorities for companies' charging strategies

88% have or plan to implement a charging policy. This applies consistently across all company sizes.

Company premises charging is a current or future strategy for **55%** of companies, with among them 53% having already installed charging points or considering doing so in the next 12 months, and 52% requiring or planning to require employee payment for the charging.

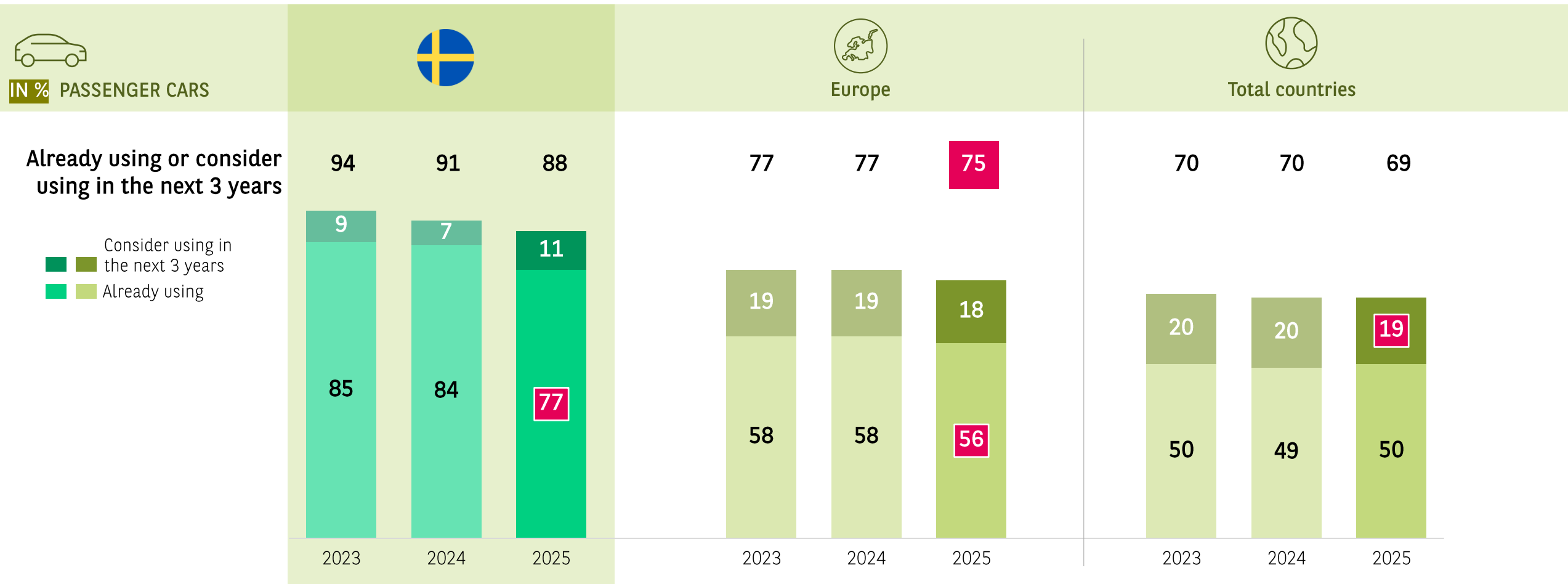
Public charging is part of the strategy for **48%** of companies, of which 57% support energy cost (30% via expense claim and 24% via energy cards), while 46% do not reimburse energy costs.

Home charging is a strategy for **45%** of companies, of which 49% support or plan to support home charger installation, with 92% covering at least part of the box and installation cost, and 52% reimbursing some energy costs.

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Sweden in 2025, 88% of the companies with passenger cars are already using at least one alternative energy technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



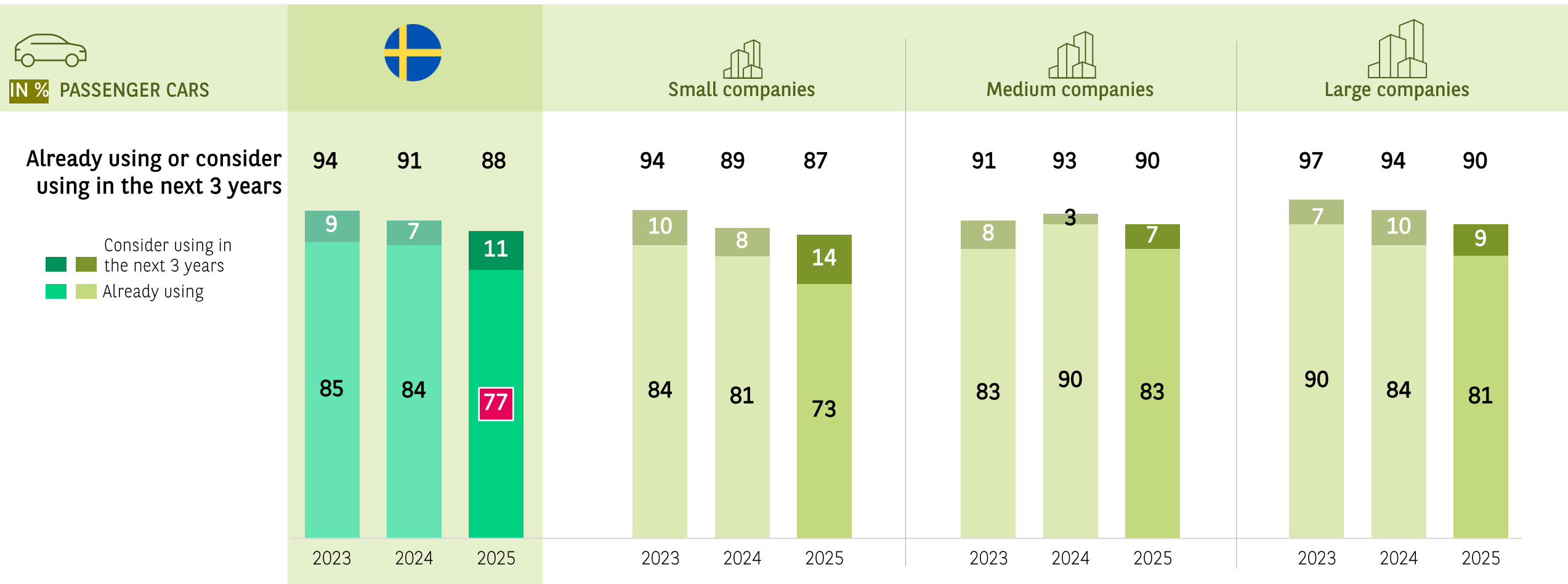
E28. Amongst the following alternative energy technologies, which ones do you currently use...? /
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

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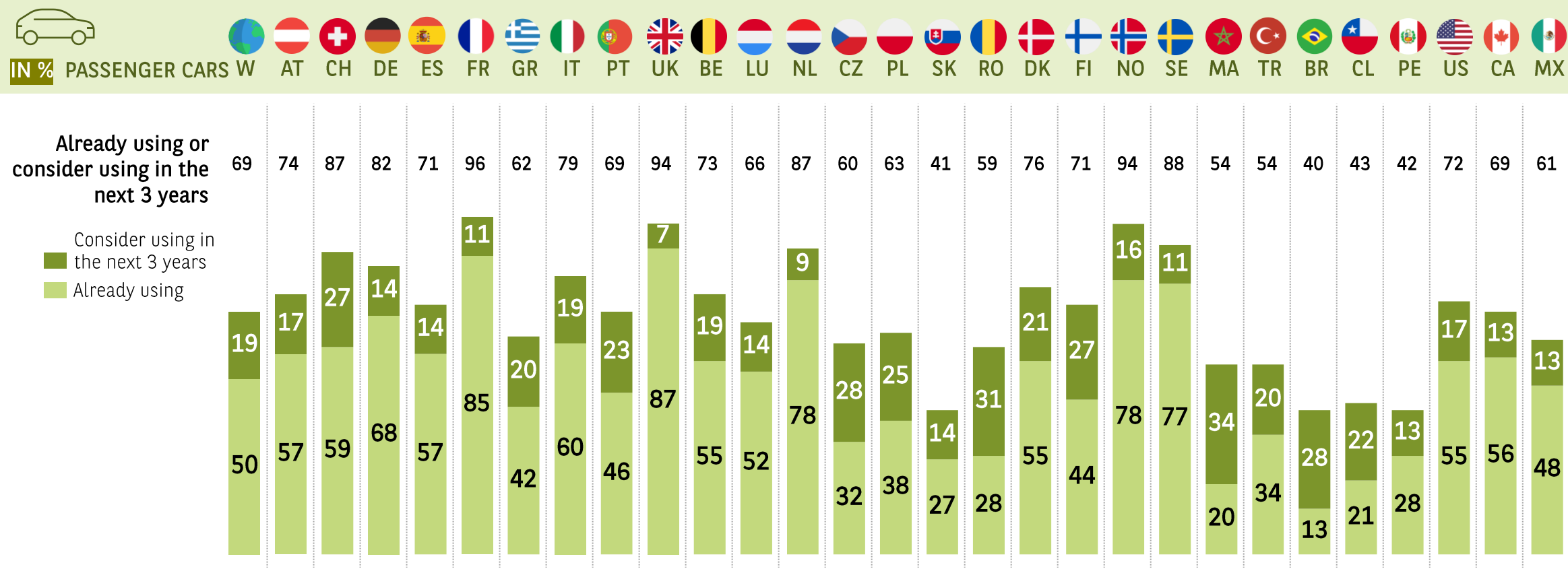
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ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

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Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Sweden in 2025, 60% of the companies with passenger cars are already using BEV or are considering using it in the next three years.

 IN % PASSENGER CARS					 Europe			 Total countries		
		Use	Consider	Total	Use	Consider	Total			
BEV	2025	37	23	60	22	17	39	19	15	34
	2024	42	23	65	24	17	42	20	16	36
	2023	47	20	67	23	16	40	19	15	34
PHEV	2025	47	10	57	28	14	41	23	13	35
	2024	51	10	61	29	14	43	23	13	36
	2023	59	13	72	29	15	44	23	14	37
HEV	2025	31	10	42	27	13	40	24	13	36
	2024	36	13	48	28	14	42	23	14	38
	2023	40	12	52	29	14	44	26	14	41

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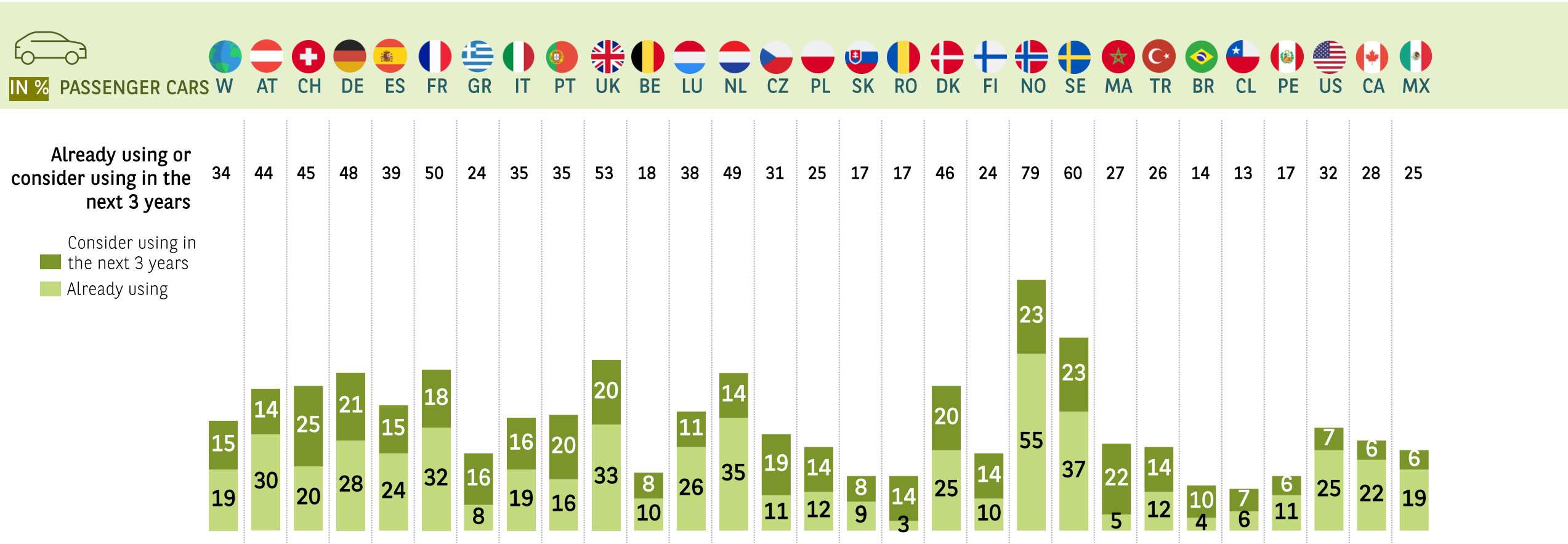
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Sweden in 2025, 60% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



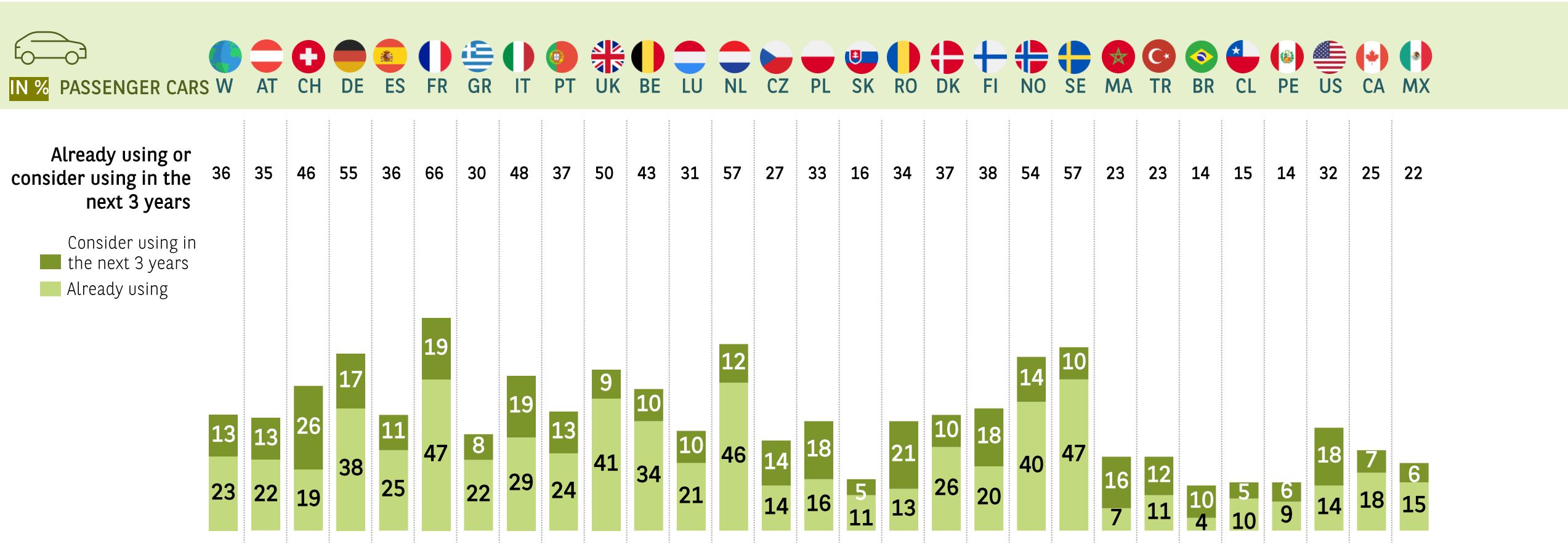
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Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

In Sweden in 2025, 57% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



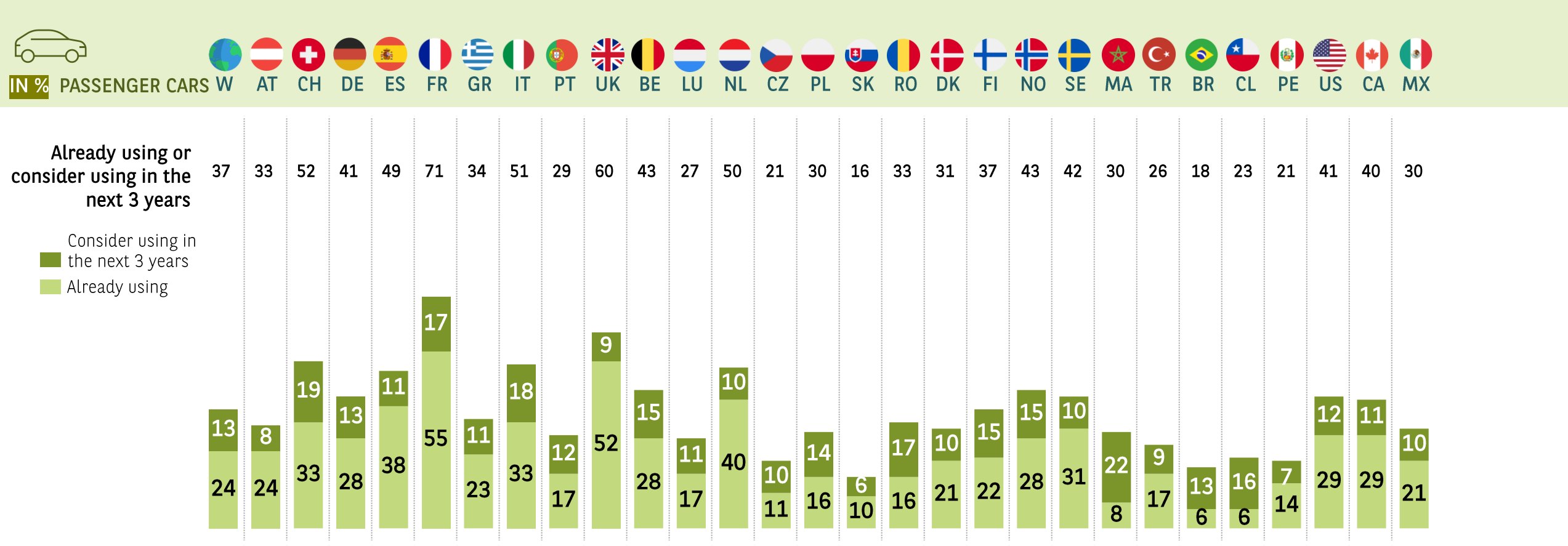
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Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON HEV

HOW TO READ THE RESULTS ?

In Sweden in 2025, 42% of the companies with passenger cars are already using HEV or are considering using it in the next three years.

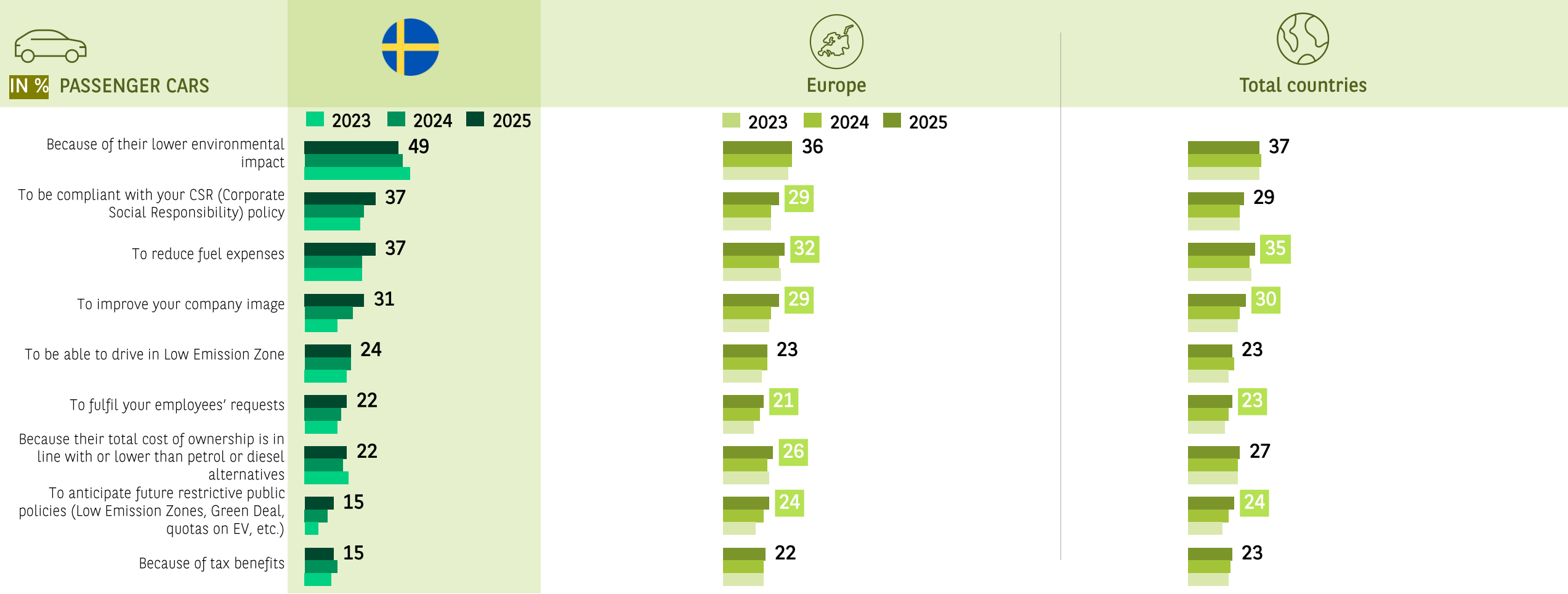


E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Sweden in 2025, 49% of the companies with passenger cars are already using alternative energy technologies or are considering it Because of their lower environmental impact.

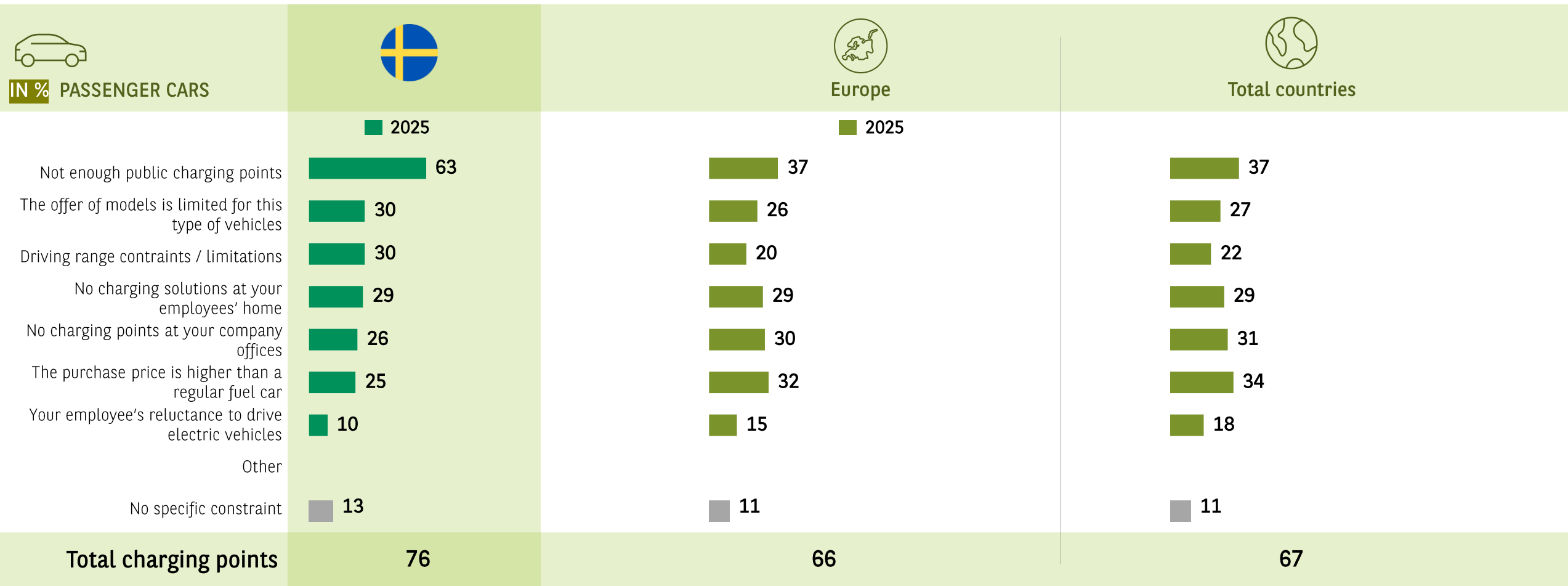


E28A. Why have you already implemented or why do you consider implementing these energy technologies?
Basis: companies that are already using or considering using alternative energy technologies for passenger cars

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Sweden in 2025, 63% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 76% of the companies mention at least one reason related to charging points.



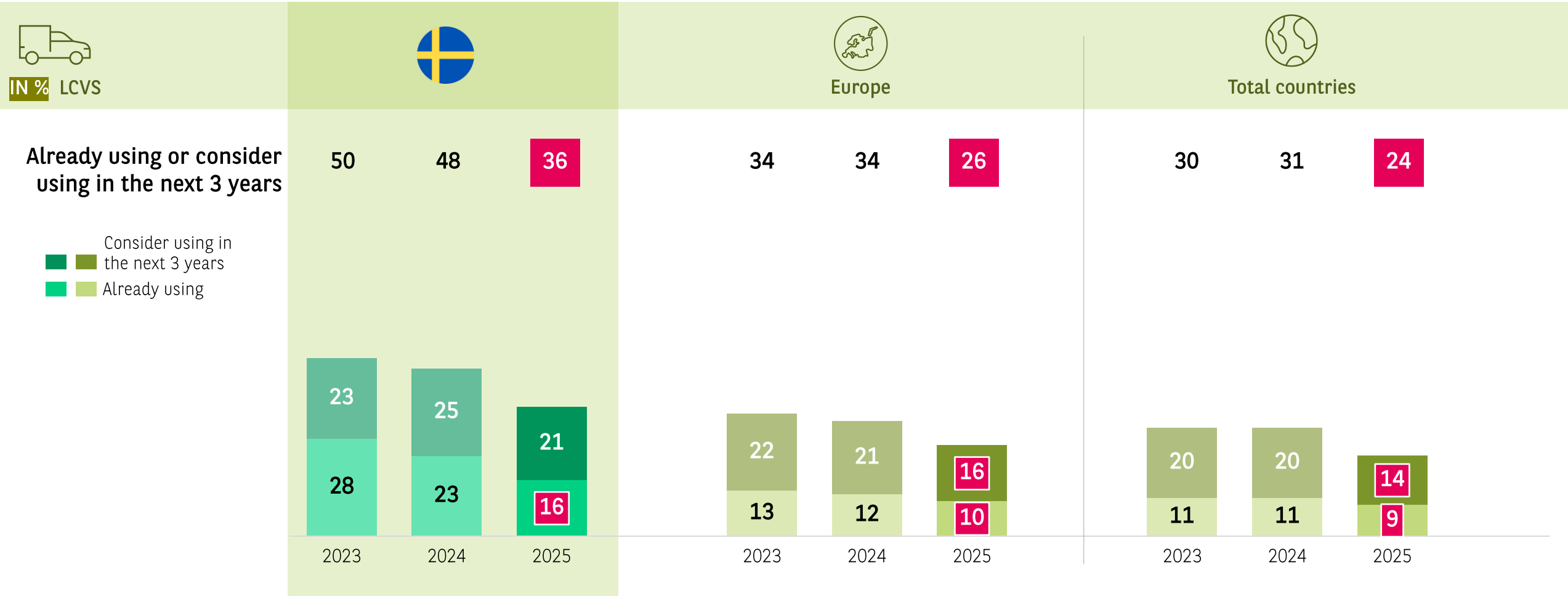
E28B_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with passenger cars and aware of EV technology

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

In Sweden in 2025, 36% of the companies with LCVs are already using at least one alternative energy technology among BEV and Hydrogen fuel cell or are considering doing so in the next 3 years.



E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

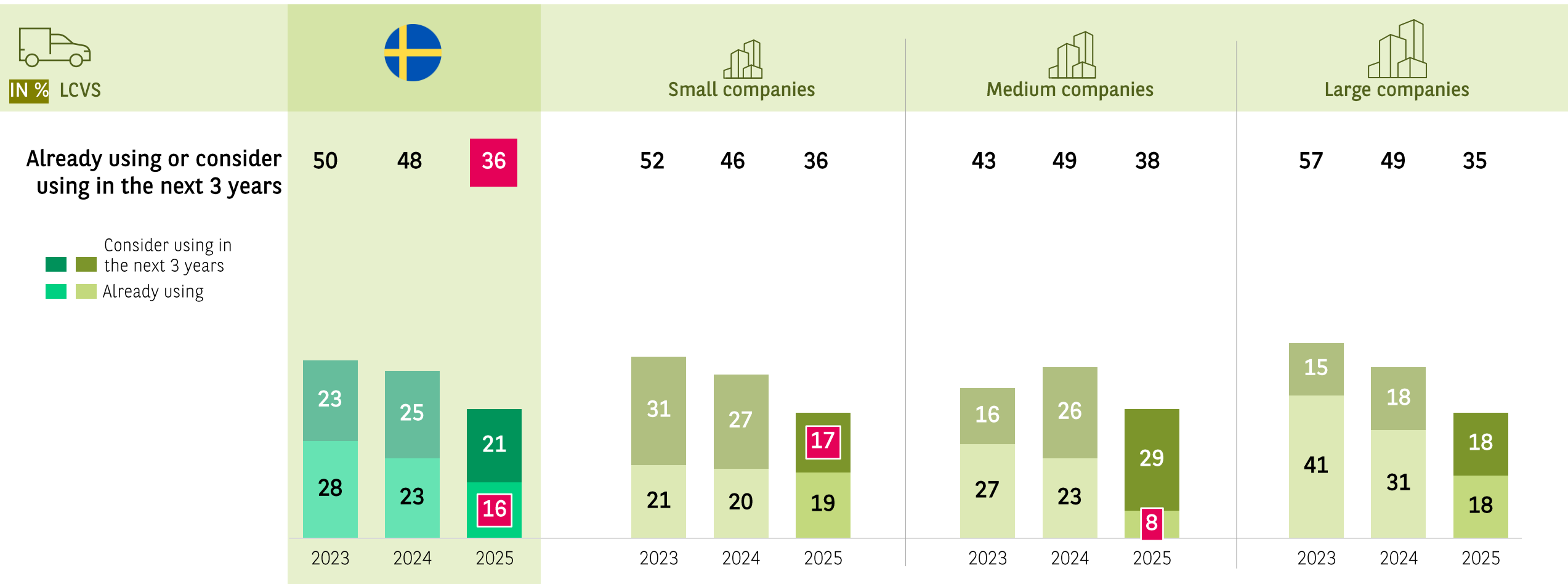
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X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

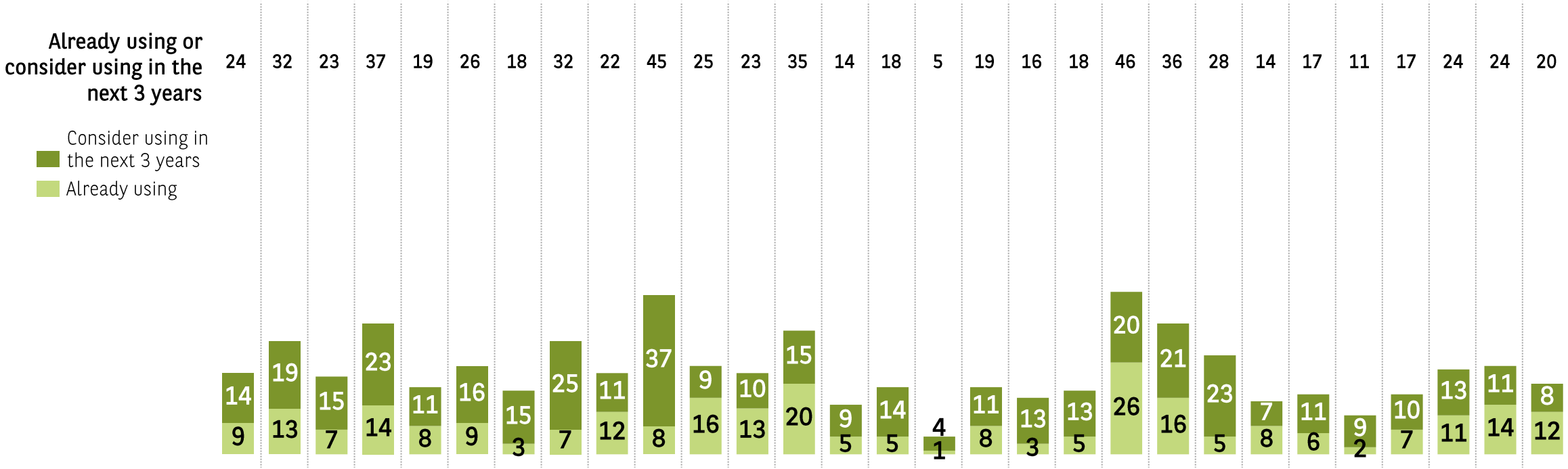
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IN % LCVS



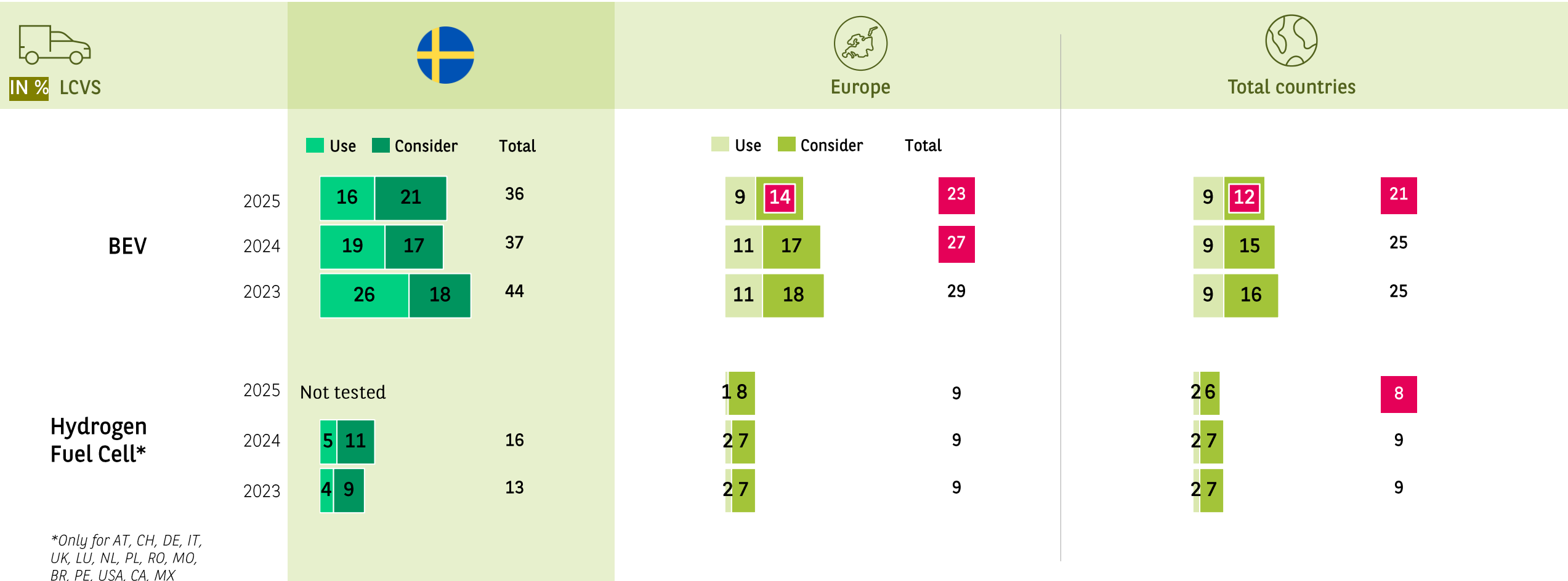
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Basis: companies with LCVs

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Sweden in 2025, 36% of the companies with LCVs are already using or consider using BEV in the next three years.



*Only for AT, CH, DE, IT, UK, LU, NL, PL, RO, MO, BR, PE, USA, CA, MX

E28. Amongst the following alternative energy technologies, which ones do you currently use...? / E28bis. Amongst the following alternative energy technologies, which ones are you considering using...? Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Sweden in 2025, 36% of the companies with LCVs are already using BEV or are considering using it in the next three years.

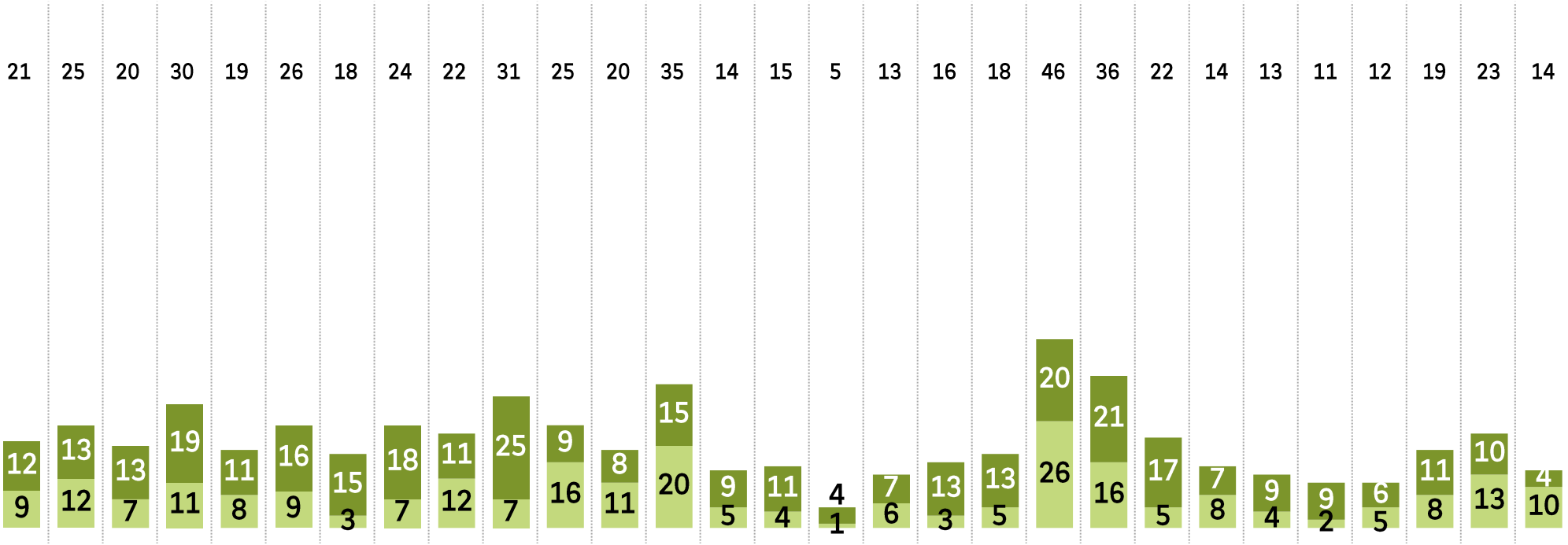


IN % LCVS



Already using or consider using in the next 3 years

Consider using in the next 3 years
Already using



E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON HYDROGEN FUEL CELL



IN % LCVS

W AT CH DE

IT

UK

LU

PL

RO

MA

BR

PE

US

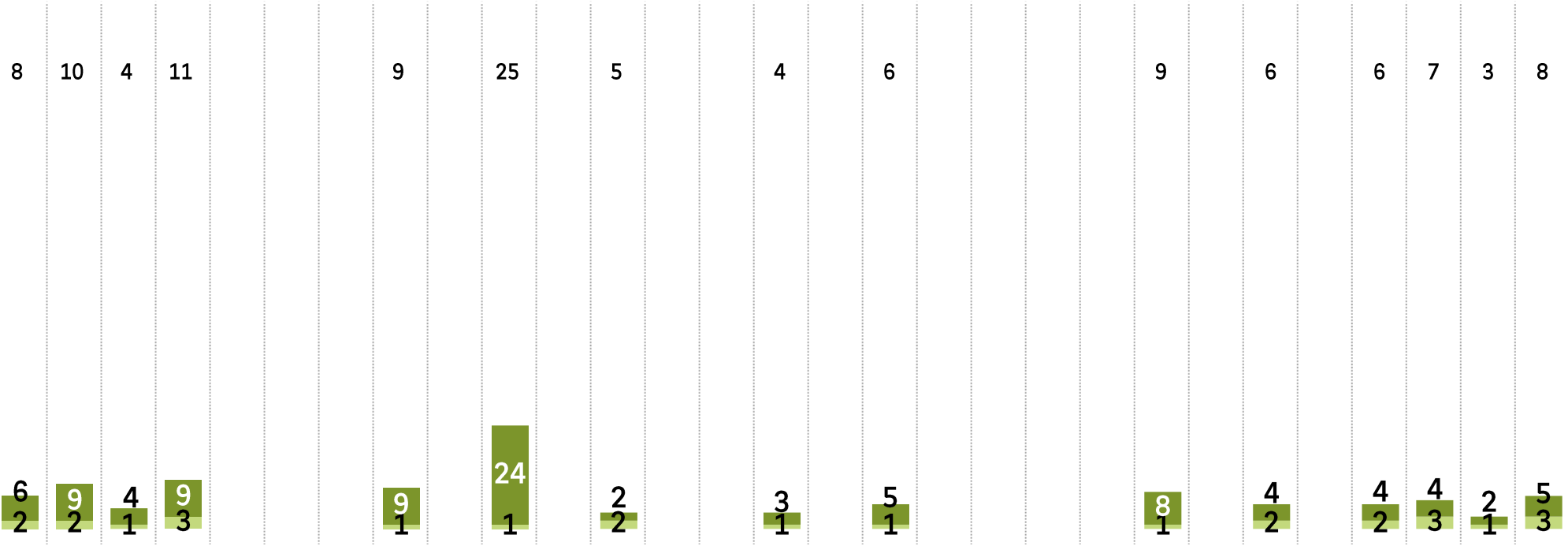
CA

MX

Already using or
consider using in the
next 3 years

Consider using in
the next 3 years

Already using

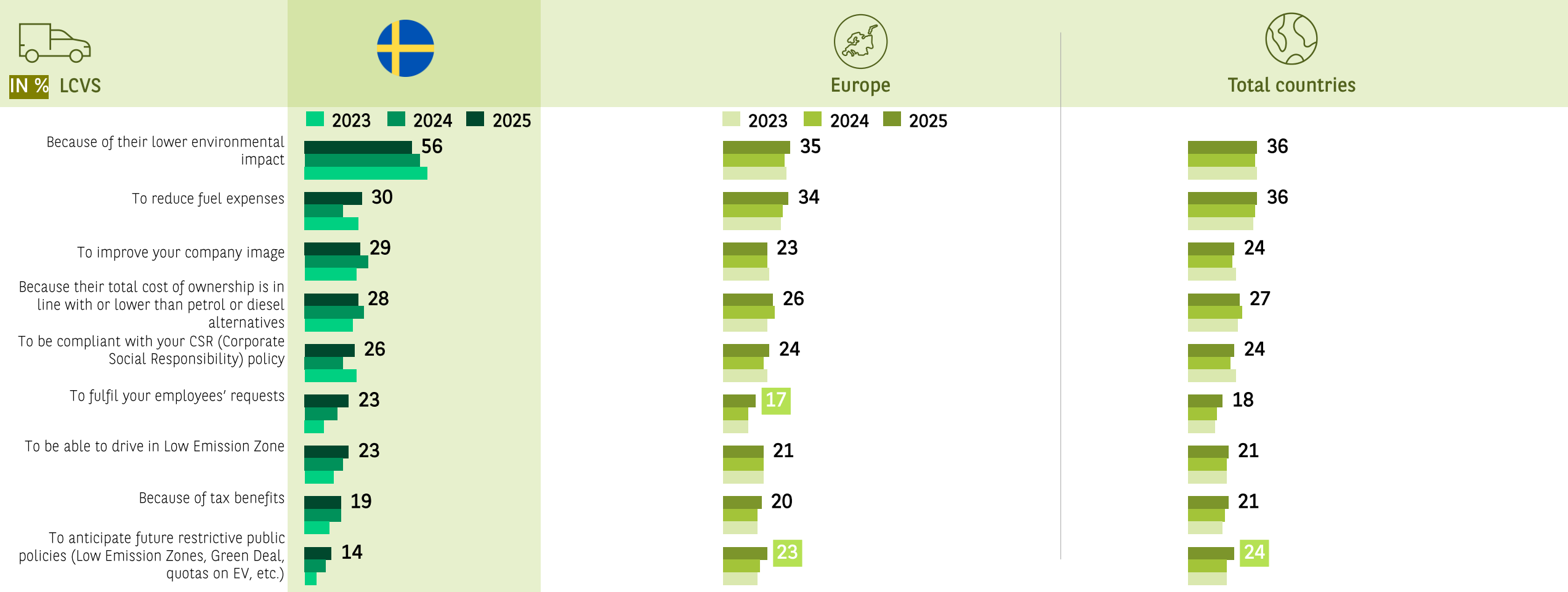


E28. Amongst the following alternative energy technologies, which ones do you currently use...?
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Basis: companies with LCVs

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR LCVs

HOW TO READ THE RESULTS ?

In Sweden in 2025, 56% of the companies with LCVs are already using alternative energy technologies or are considering it Because of their lower environmental impact.



E28A. Why have you already implemented or why do you consider implementing these energy technologies?
Basis: companies that are already using or considering using alternative energy technologies for LCVs

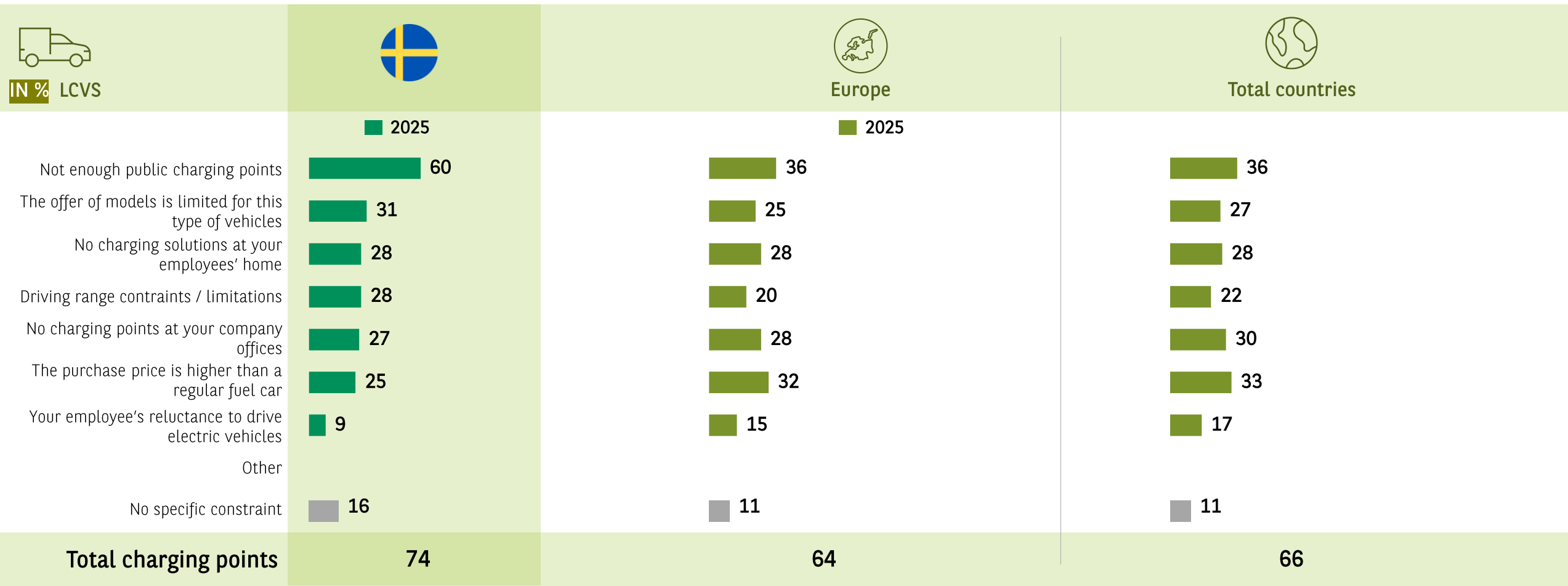
X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

New question

HOW TO READ THE RESULTS ?

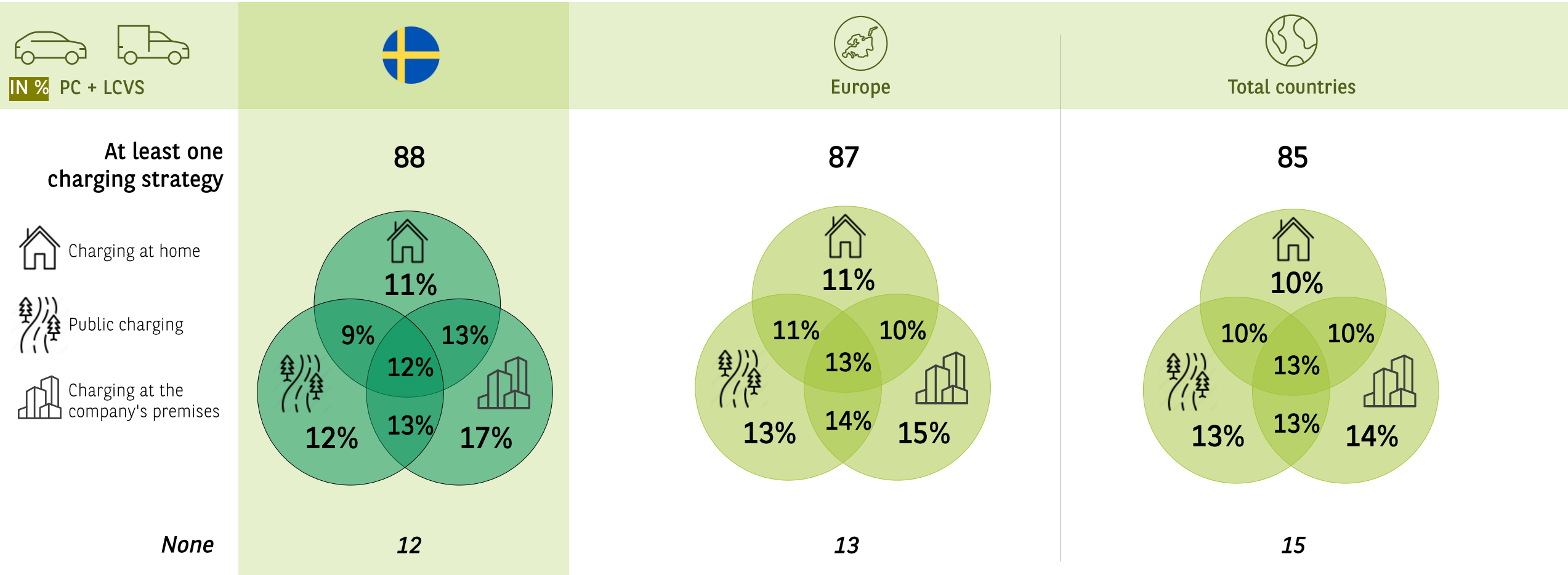
In Sweden in 2025, 60% of the companies with LCVs declare that the main constraint for using electric LCVs is: Not enough public charging points. And 74% of the companies mention at least one reason related to charging points.



E28B_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?
Basis: companies with LCVs and aware of EV technology

HOW TO READ THE RESULTS ?

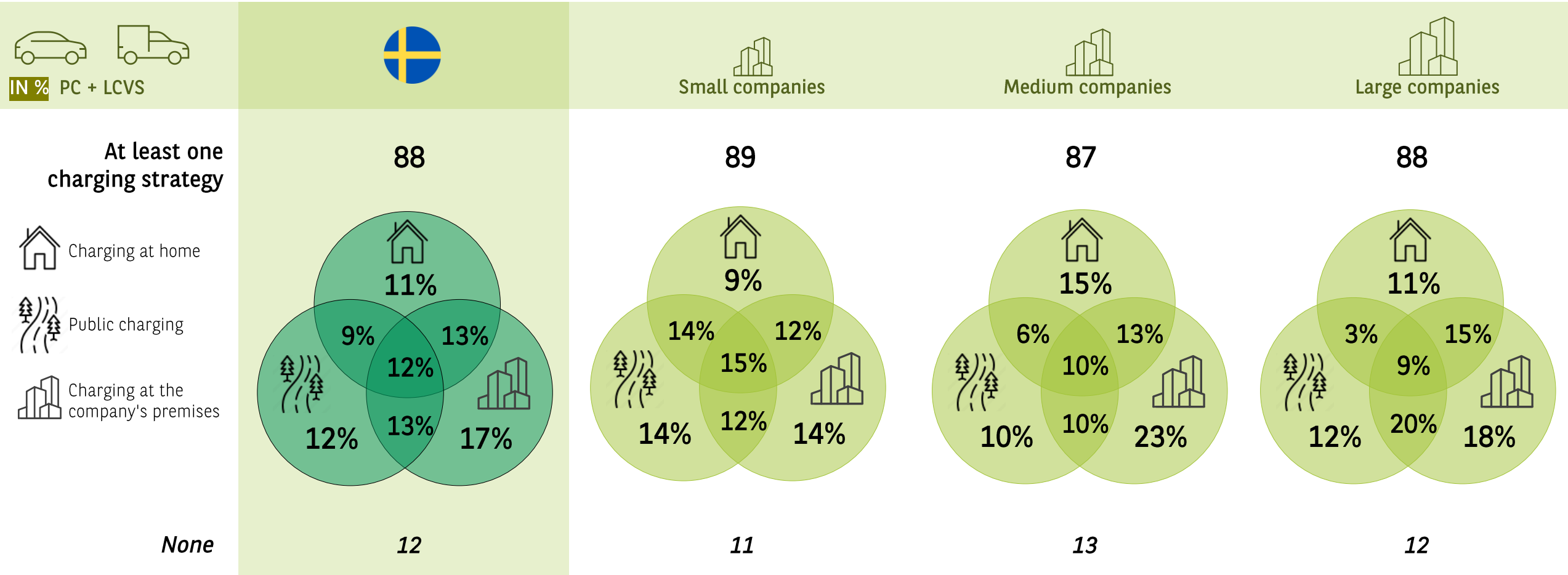
In Sweden in 2025, 88% of the companies have at least one charging strategy or will have one in the future.



E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

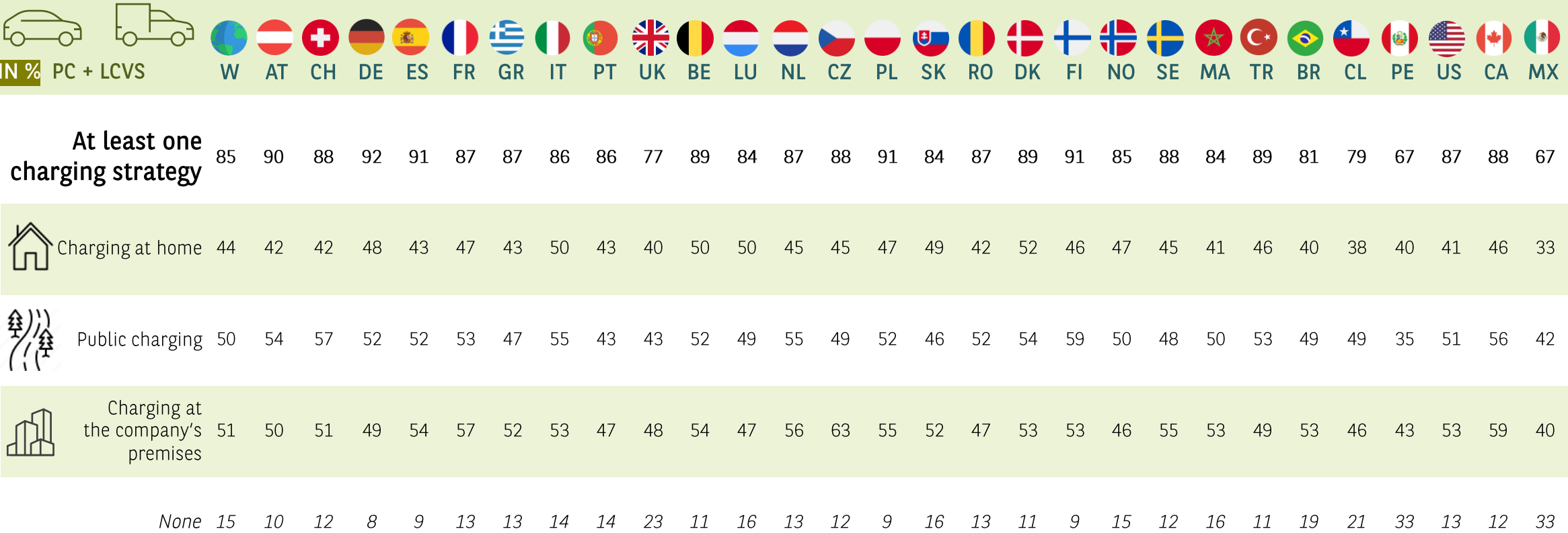
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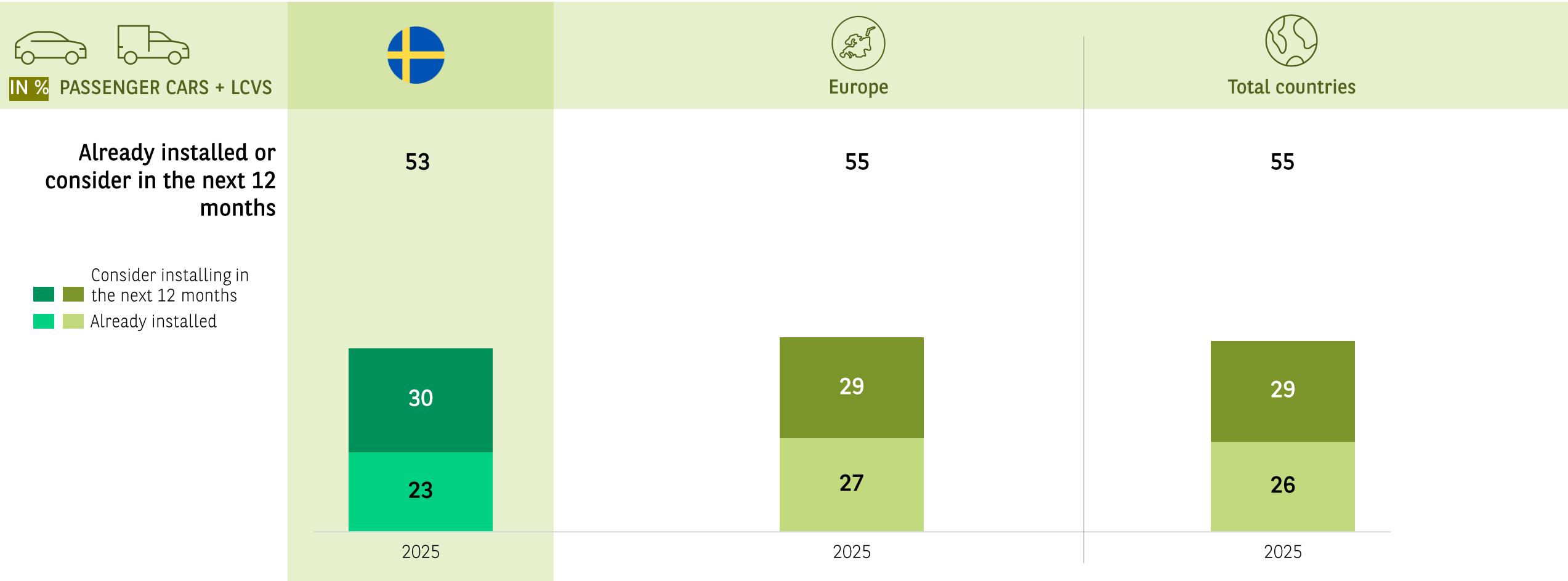
E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

HOW TO READ THE RESULTS ?

In Sweden in 2025, 53% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



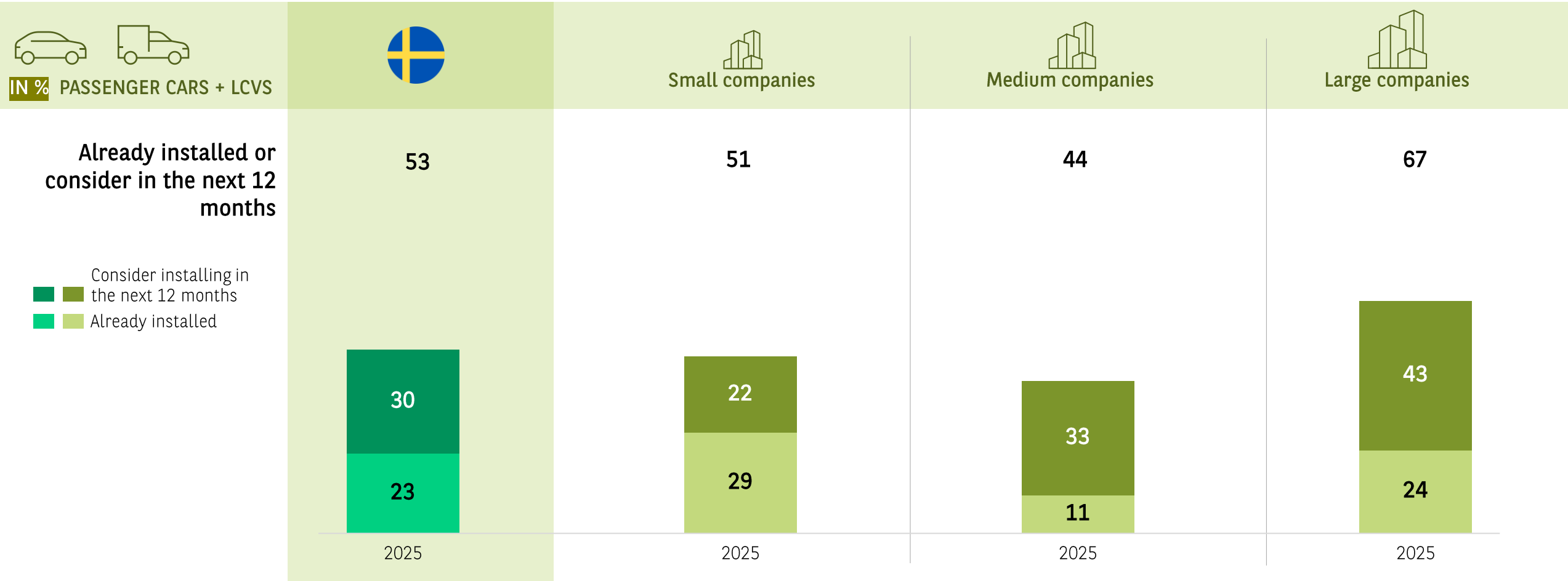
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

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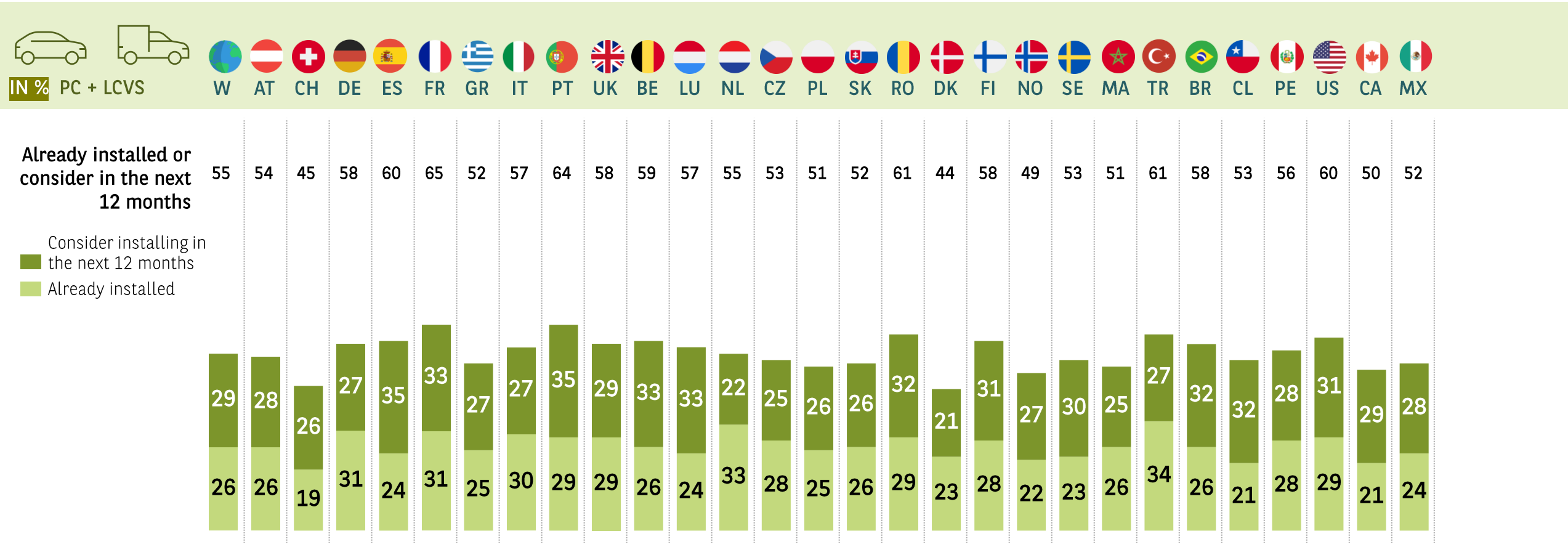
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New question

HOW TO READ THE RESULTS ?

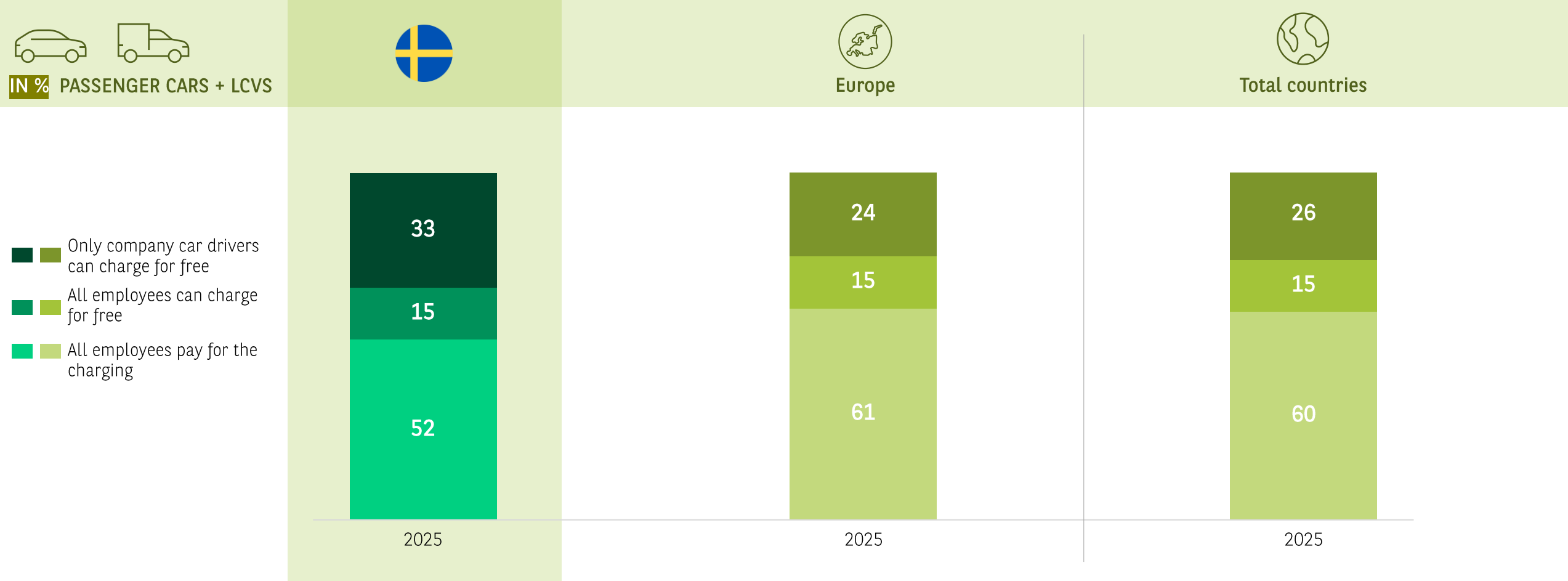
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E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises

HOW TO READ THE RESULTS ?

In Sweden in 2025, 33% of the companies that have already installed or are considering installing charging points on their premises manage or plan to manage the cost of charging with free charge for company car drivers.



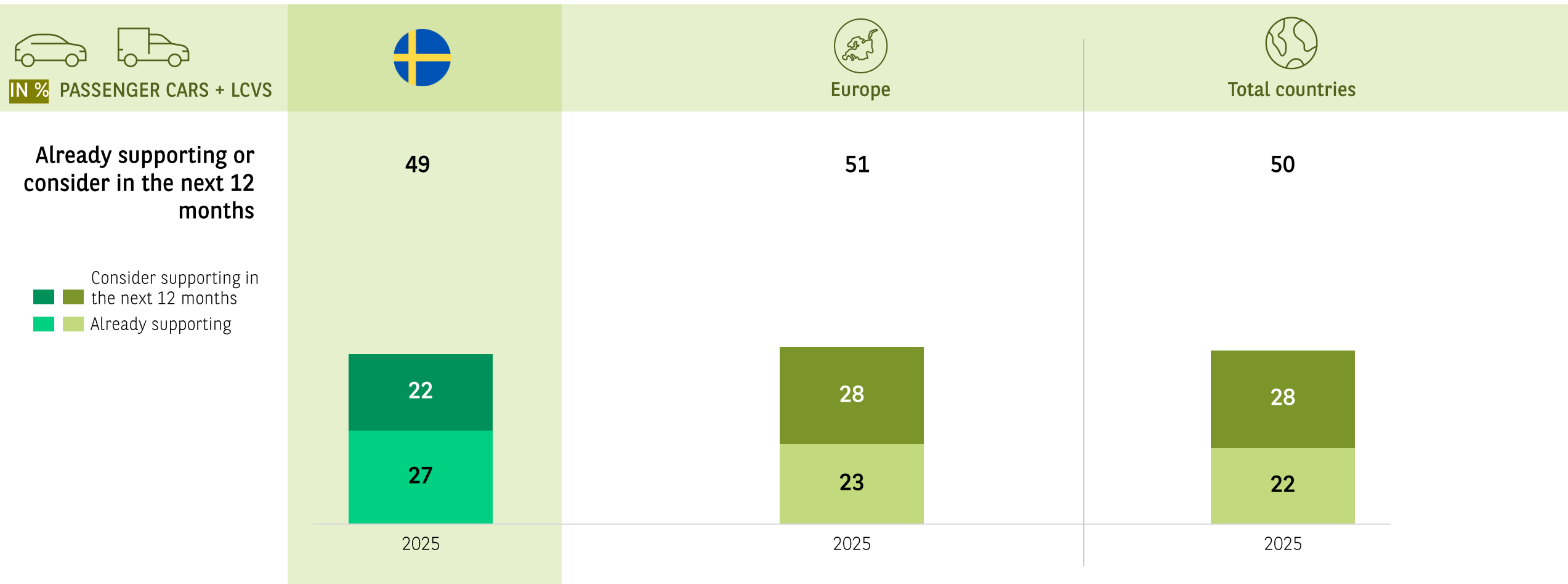
E33. How do you manage or plan to manage the cost of charging at company's premises?
Basis: companies that have already installed or are considering installing charging points on their premises

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

In Sweden in 2025, 49% of the companies that are using or considering home charging are already supporting company car drivers for the installation of home charging points or are considering doing so in the next 12 months.



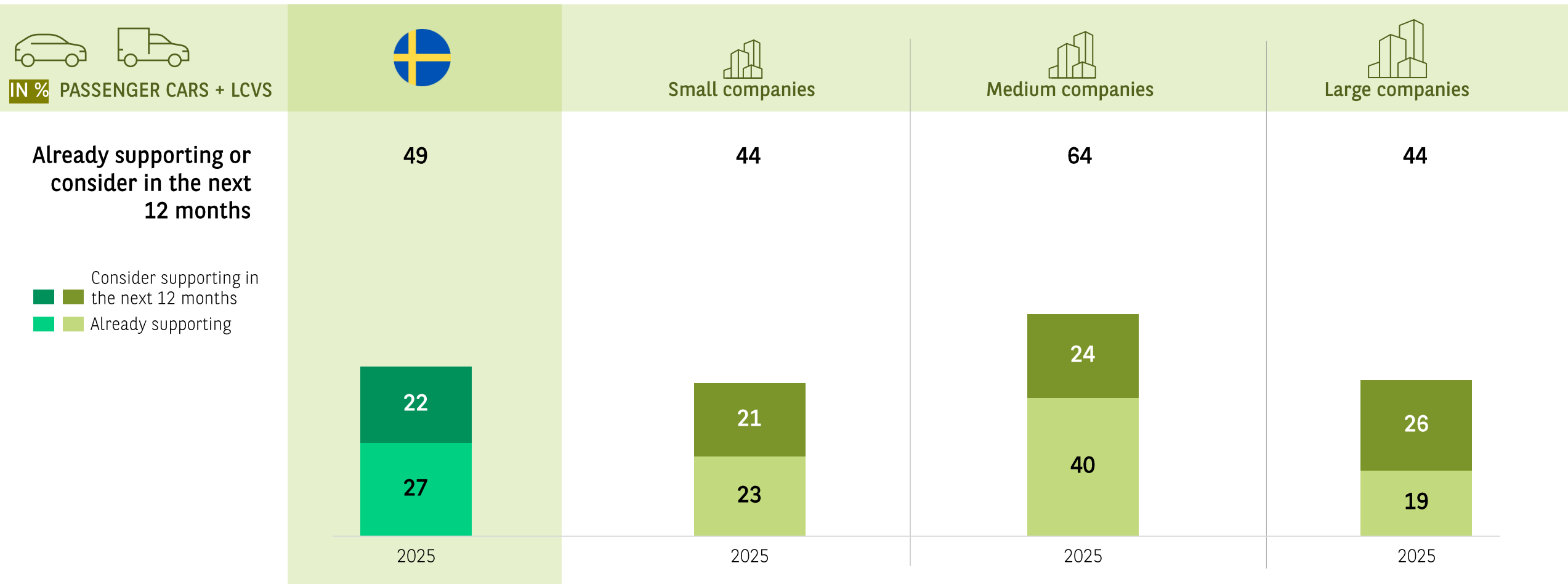
E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies using or considering home charging

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

In Sweden in 2025, 49% of the companies that are using or considering home charging are already supporting company car drivers for the installation of home charging points or are considering doing so in the next 12 months.



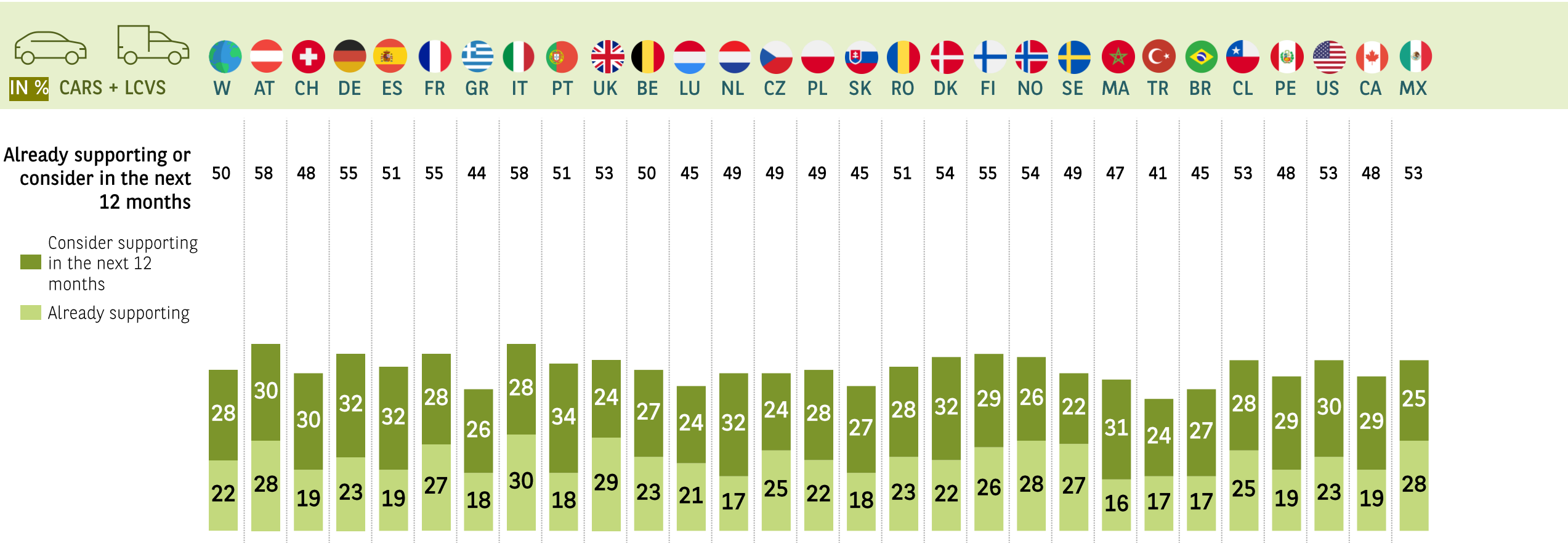
E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies with charging at home

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

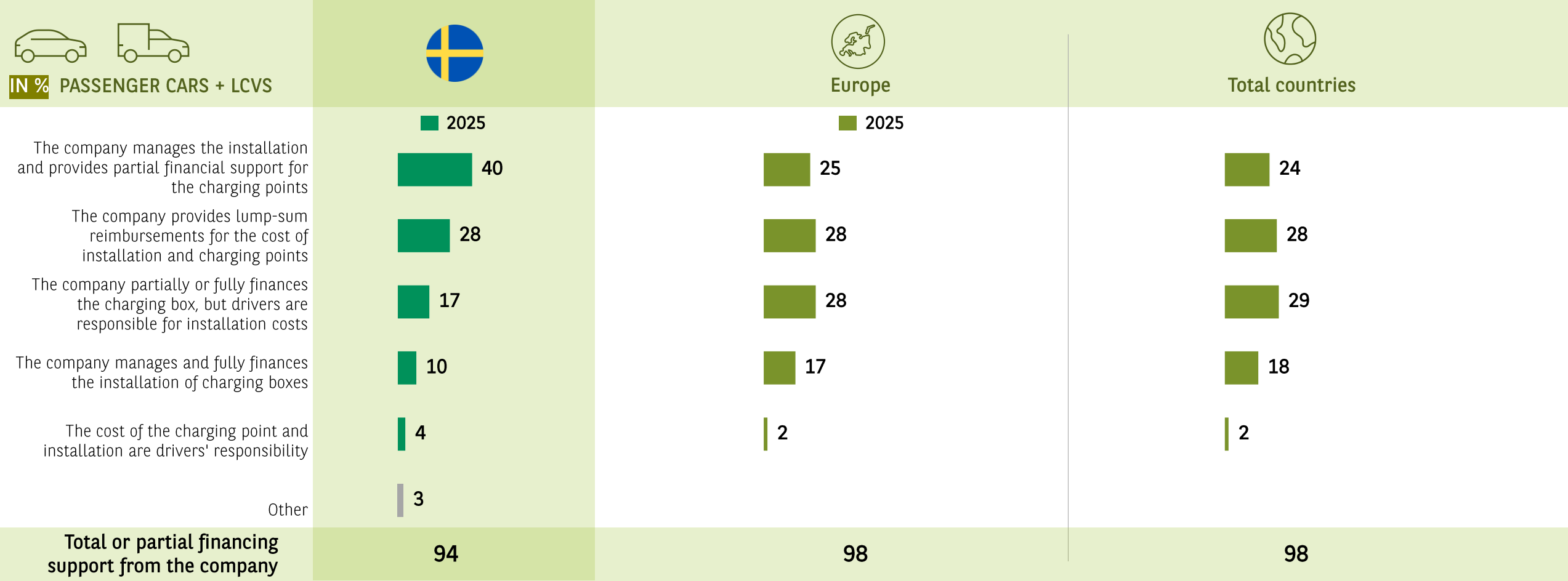
In Sweden in 2025, 49% of the companies that are using or considering home charging are already supporting company car drivers for the installation of home charging points or are considering doing so in the next 12 months.



E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies with charging at home

HOW TO READ THE RESULTS ?

In Sweden in 2025, 40% of the companies that are already supporting or are considering supporting charging points installation at home have the following policy :
"The company manages the installation and provides partial financial support for the charging points"



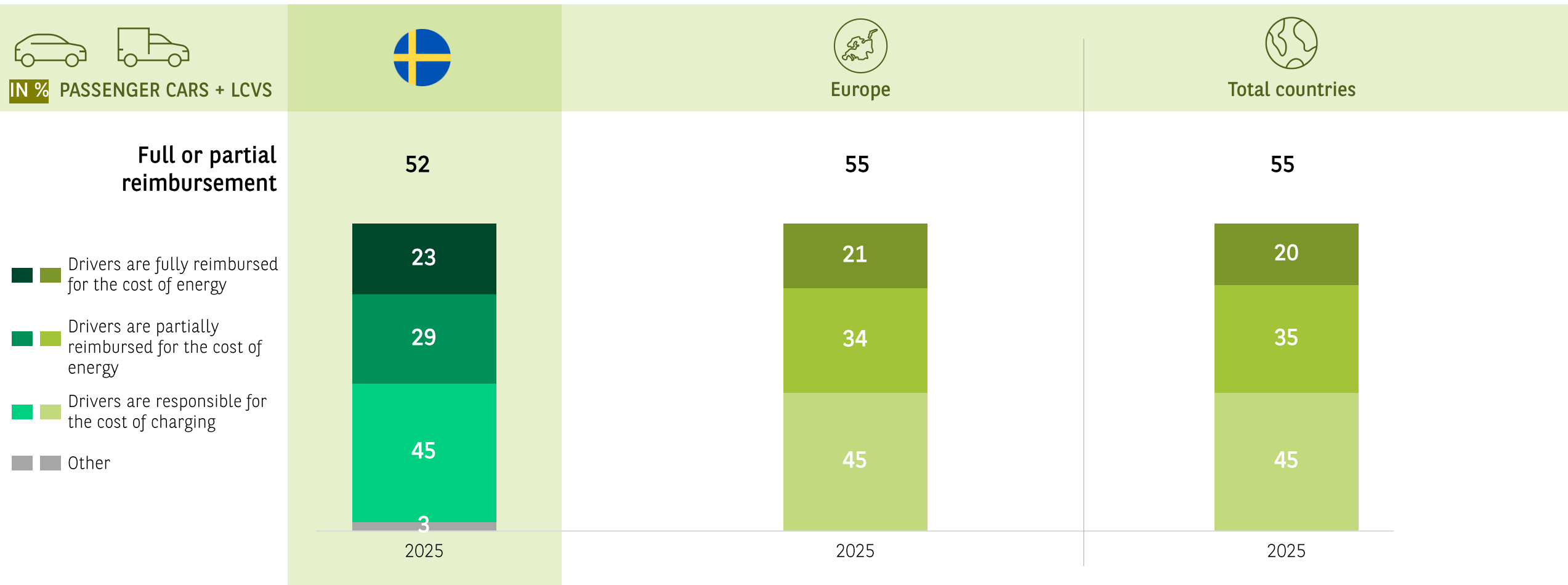
E35. Regarding home charging, how does your company currently support, or plan to support, its company car drivers with the installation of home charging points?
Basis: companies that are already supporting or are considering supporting charging points installation at home

SUPPORT OF ENERGY COST OF HOME CHARGING POINTS

New question

HOW TO READ THE RESULTS ?

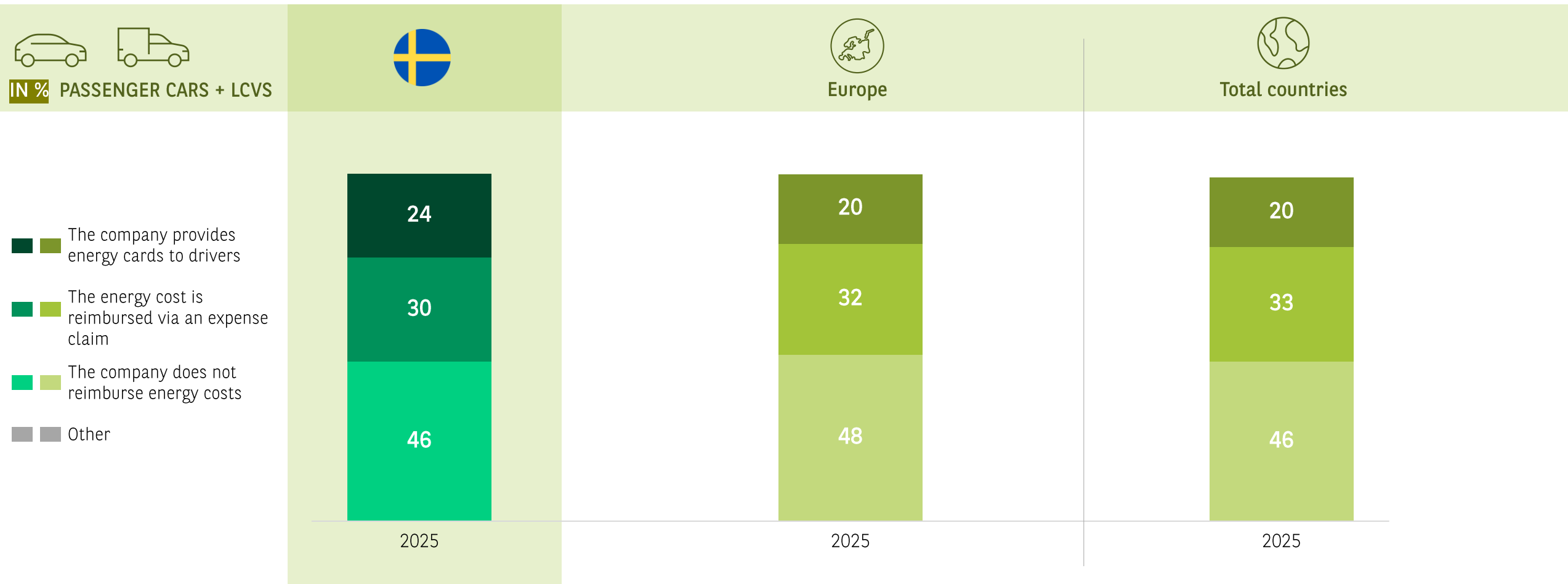
In Sweden in 2025, 23% of the companies that are already supporting or are considering supporting charging points installation at home fully reimburse drivers for the cost of energy, or plan doing so.



E36. How do you manage or plan to manage the energy costs of home charging for company car drivers?
Basis: companies that are already supporting or are considering supporting charging points installation at home

HOW TO READ THE RESULTS ?

In Sweden in 2025, 24% of the companies that are using or considering public charging provide energy cards to drivers.



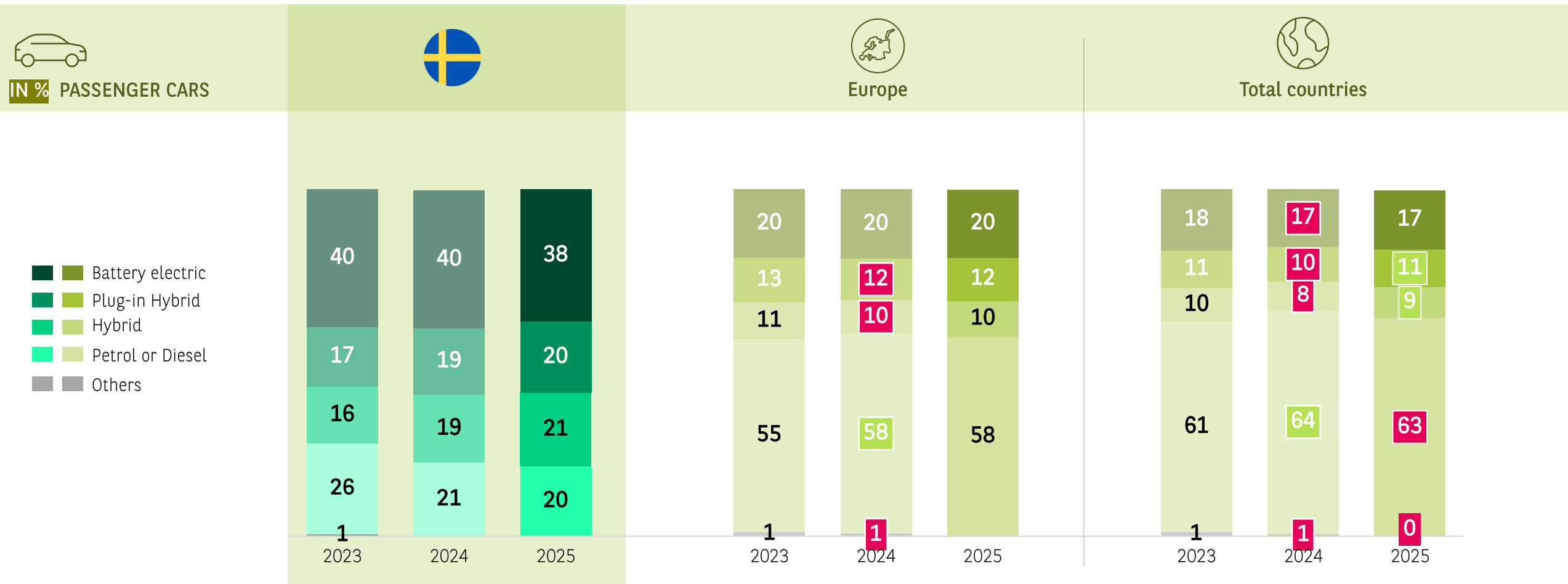
E37. Regarding public charging, how does your company manage or plan to manage the energy costs incurred by company car drivers?
Basis: companies using or considering public charging

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Sweden in 3 years, 38% of the passenger car fleet is expected to be BEV.



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

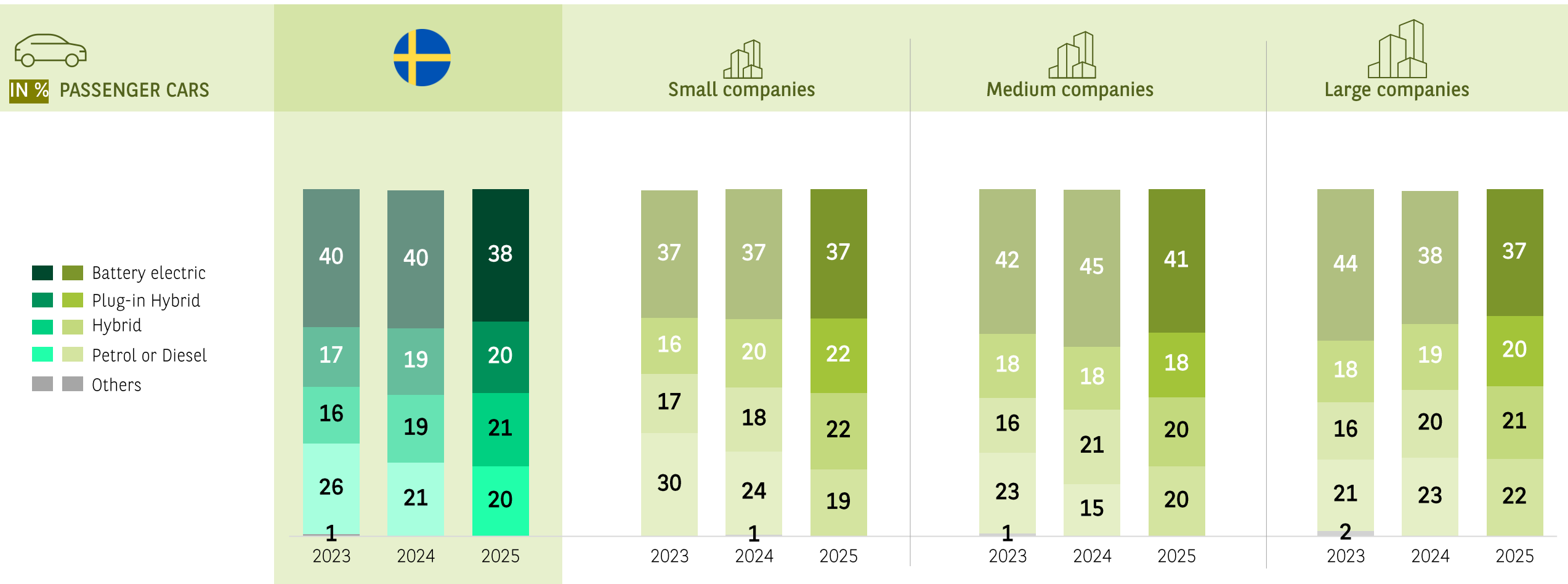
X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

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EXPECTED FLEET SHARE PER ENERGY

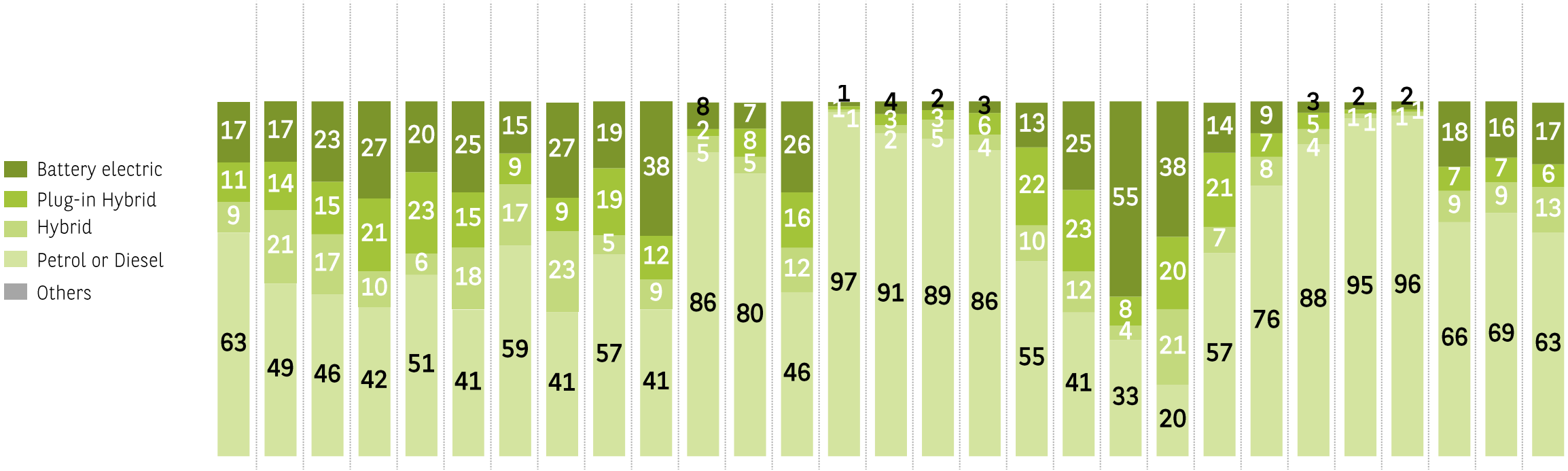
FOCUS ON PASSENGER CARS

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IN % CARS



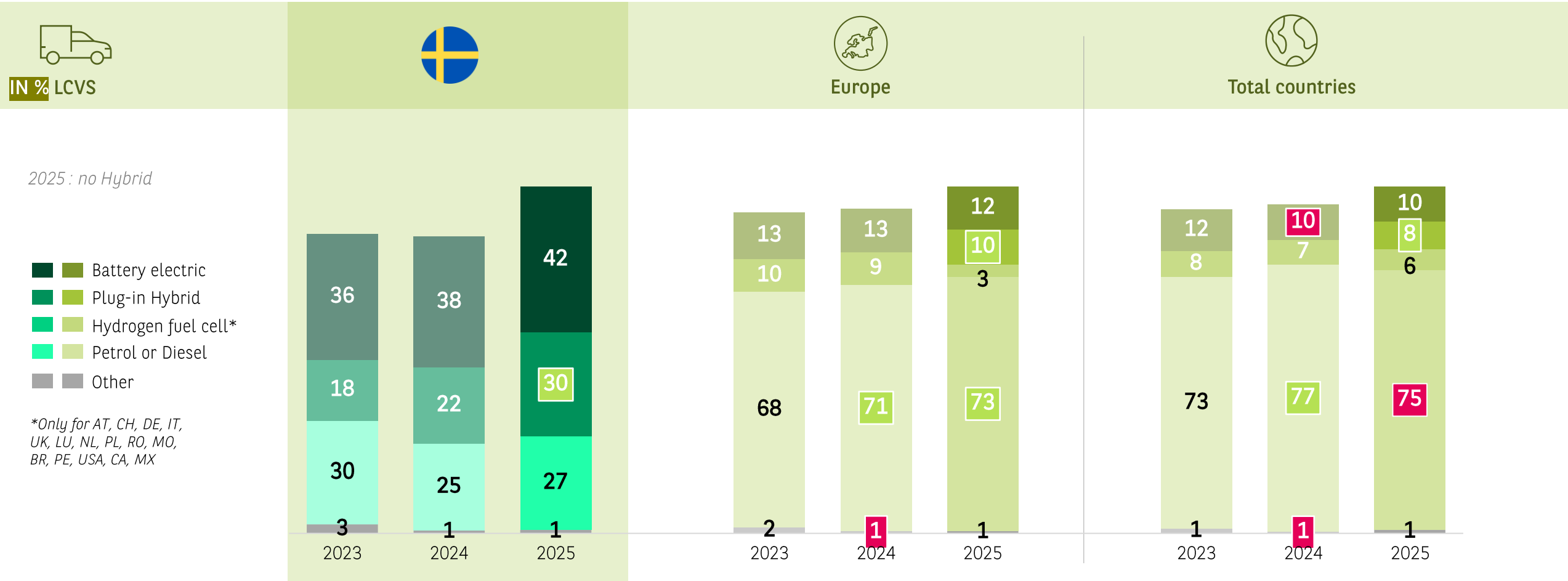
A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Sweden in 3 years, 42% of the LCV fleet is expected to be BEV.



A53. What percentage of your LCV fleet do you expect to be: battery electric, Plug-in Hybrid, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs

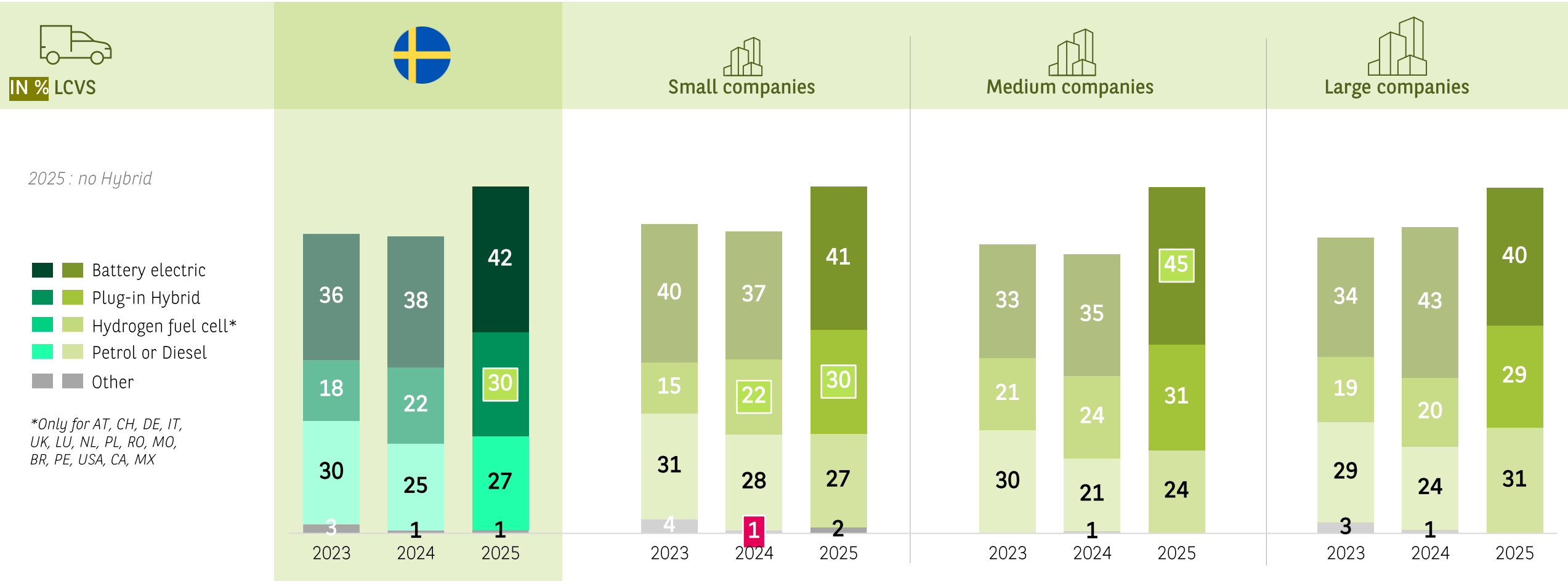
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EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

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EXPECTED FLEET SHARE PER ENERGY

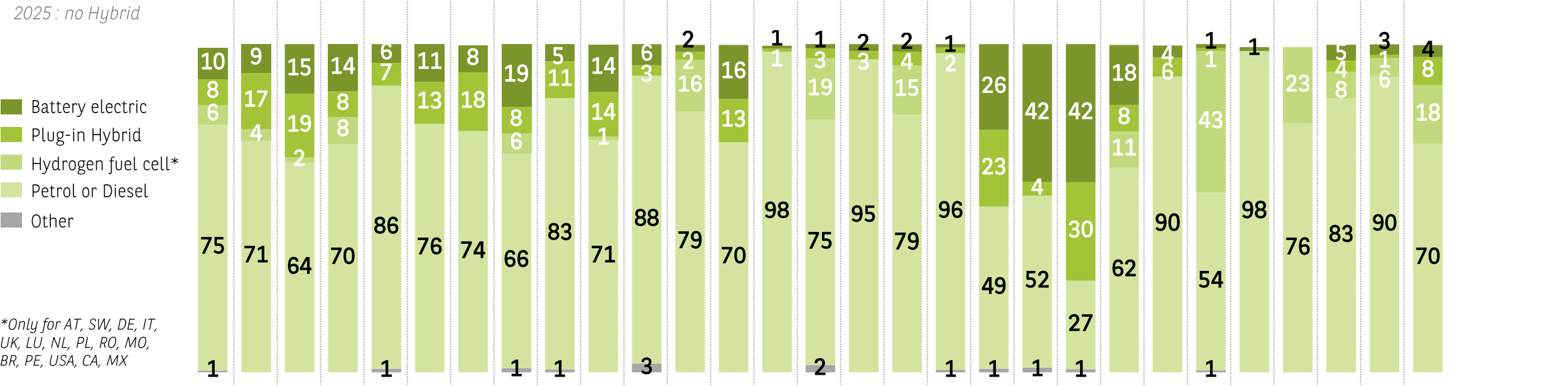
FOCUS ON LCVs

HOW TO READ THE RESULTS ?

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IN % LCVs



*Only for AT, SW, DE, IT, UK, LU, NL, PL, RO, MO, BR, PE, USA, CA, MX

A53. What percentage of your LCV fleet do you expect to be: battery electric, Plug-in Hybrid, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs

04

CONNECTED FLEETS

What are the applications in terms of connected vehicles, data management solutions, and road safety equipment?



Telematics adoption remains stable in Swedish fleets in 2025

34% of Swedish companies have adopted connected vehicles, vs 38% for the European average.

17% have connected passenger cars and 21% have connected LCVs. Both figures are stable compared to the previous year.

Like last year, the use of data coming from telematics remains marginal but the consideration high

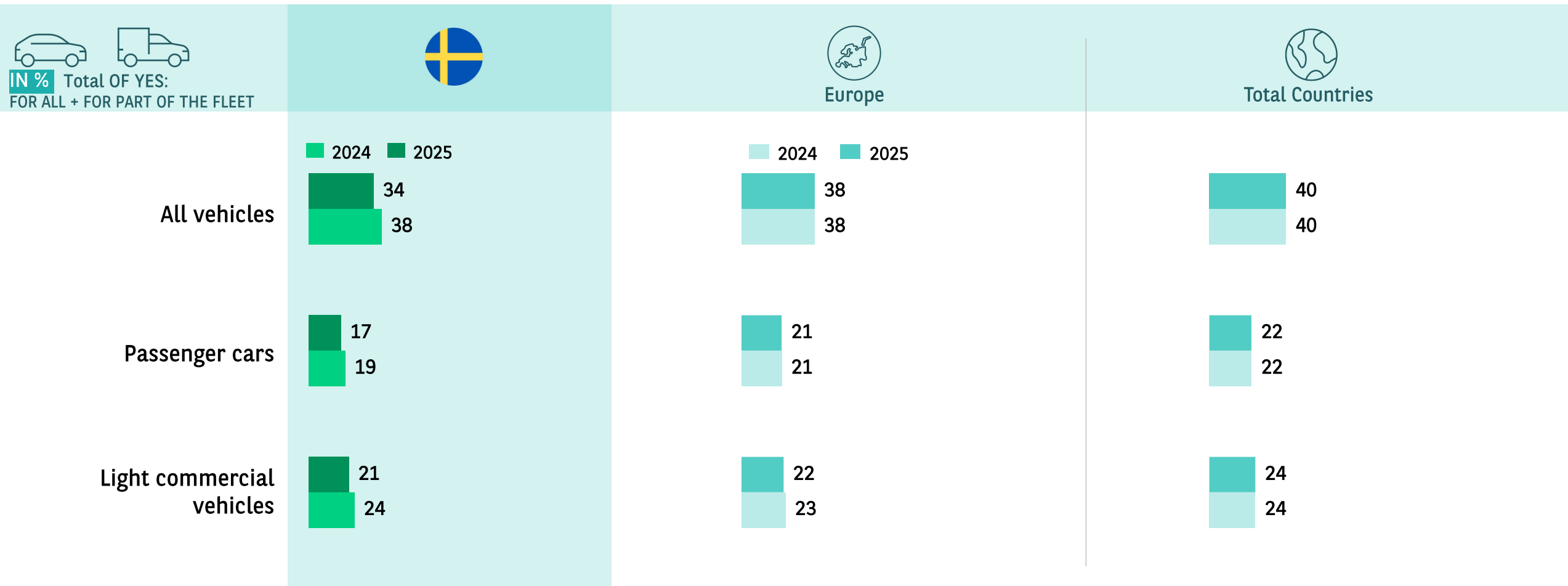
Telematics data usage remains low at **12%** overall, with a huge correlation to company sizes: from 6% in small companies to 22% in larger ones.

But interest in leveraging this data appears to be high, with **41%** of companies considering its use, and even more so among the smaller ones (55%).

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Sweden, in 2025, 34% of the companies have connected vehicles for all or part of their fleet.
17% have connected passenger cars and 21% have connected LCVs.



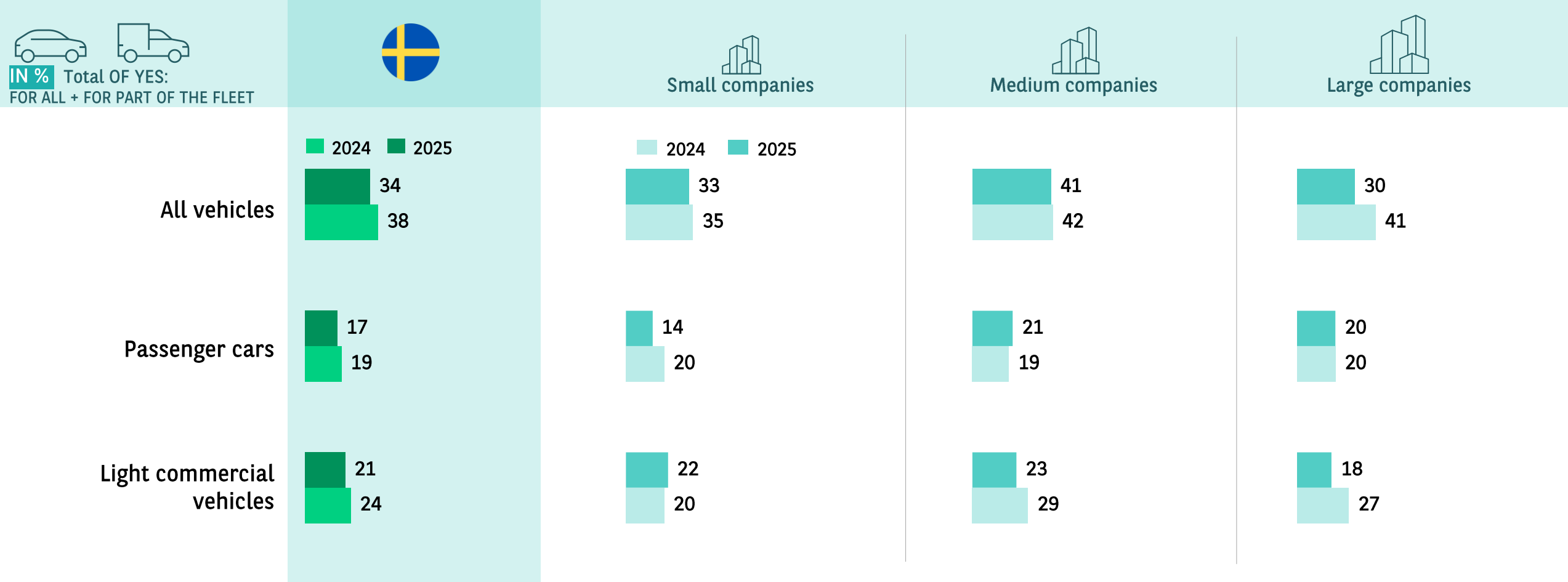
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Sweden, in 2025, 34% of the companies have connected vehicles for all or part of their fleet.
17% have connected passenger cars and 21% have connected LCVs.



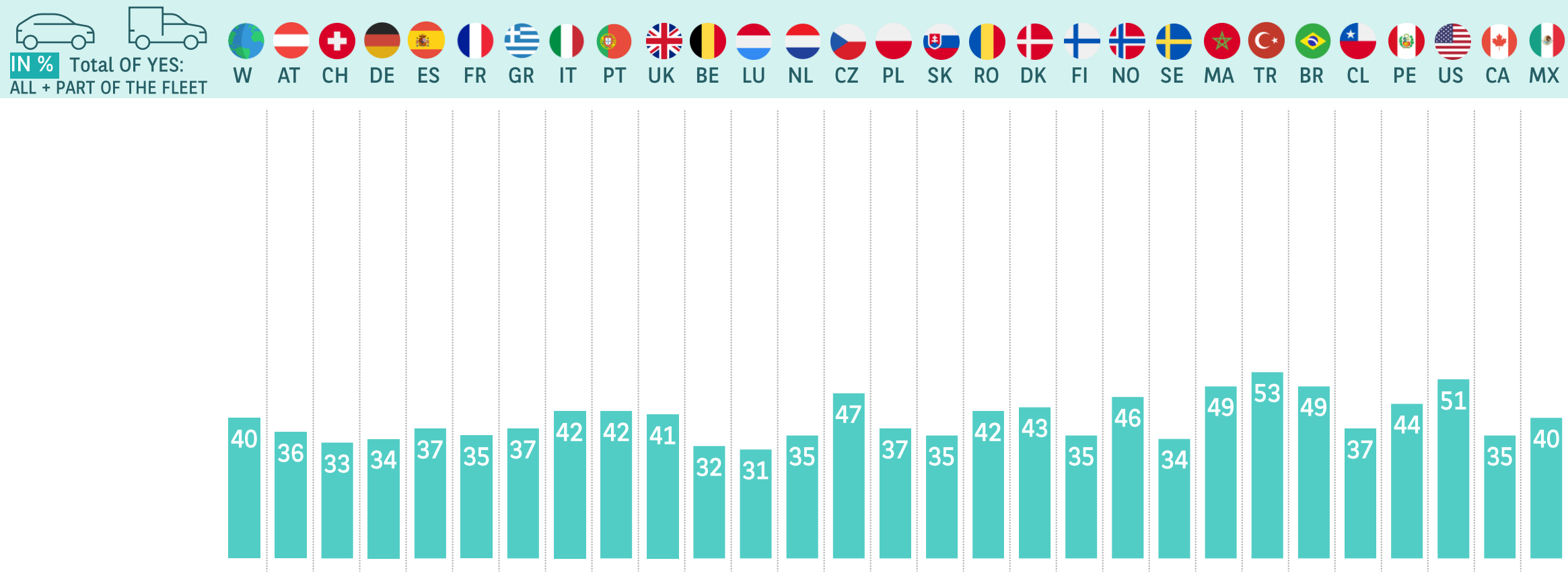
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Sweden, in 2025, 34% of the companies have connected vehicles for all or part of their fleet.







E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Sweden in 2025, 53% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.

 IN %					 Europe			 Total Countries		
		Use	Consider	Total	Use	Consider	Total			
All vehicles	2025	12	41	53	14	47	60	15	47	62
	2024	14	38	51	15	45	60	16	45	61
Passenger cars	2025	10	40	50	13	42	55	14	43	57
	2024	13	38	51	16	40	56	16	41	57
Light Commercial Vehicles	2025	12	38	50	13	47	59	14	46	60
	2024	15	34	48	13	46	59	14	46	60

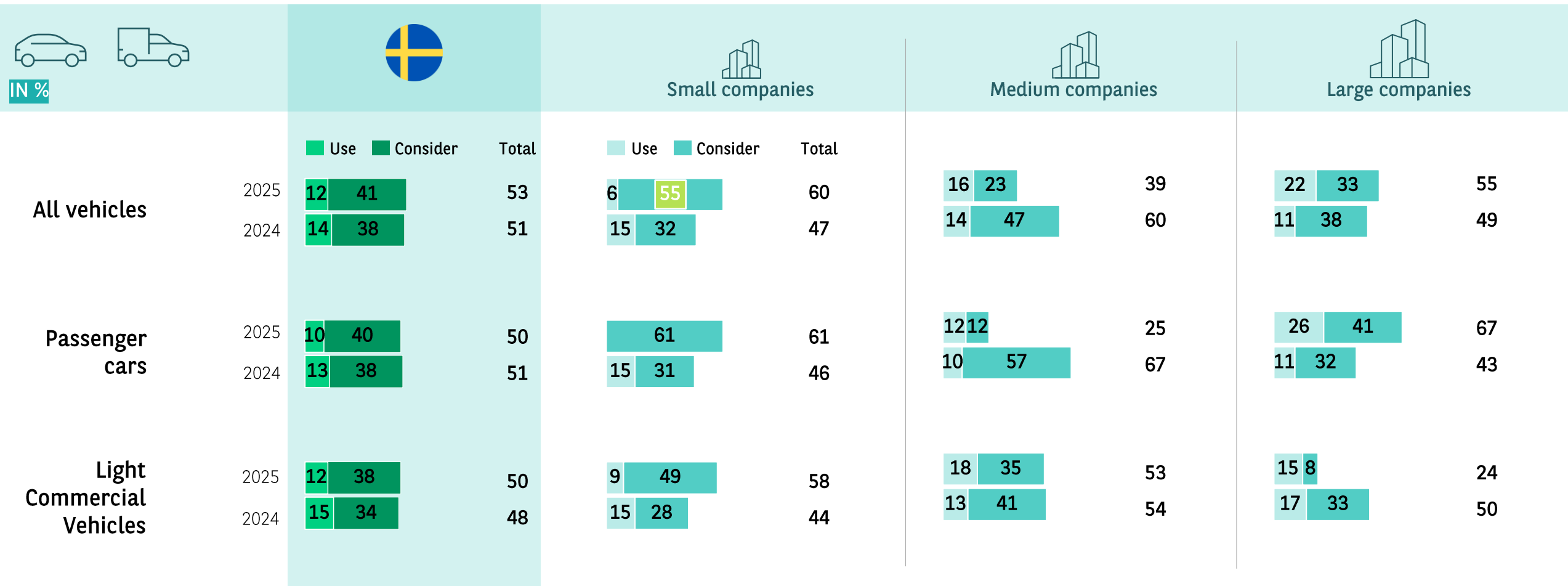
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Sweden in 2025, 53% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



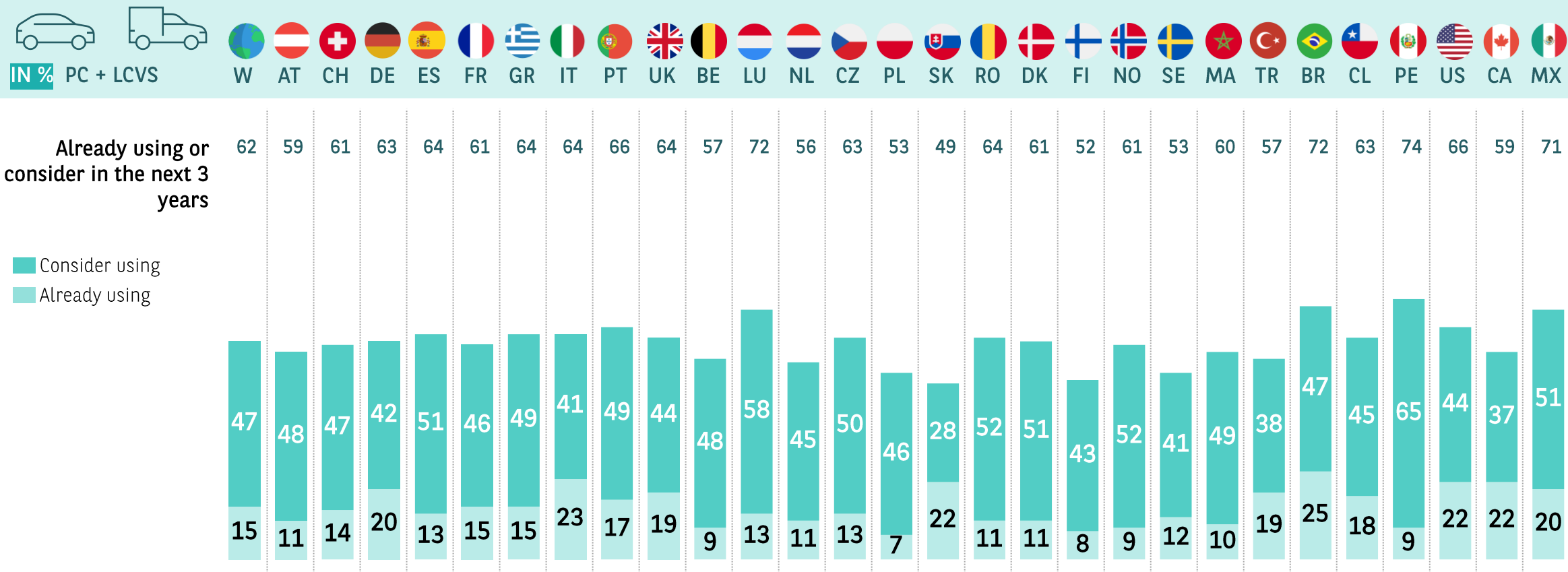
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Sweden in 2025, 53% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

05

EMPLOYEE MOBILITY

What are the perspectives in terms of
mobility policies and solutions?



A good commitment to employee mobility by Swedish companies for 2025

73% of Swedish companies have implemented at least one mobility policy or are considering doing so and **64%** of them have implemented at least one mobility solution or are considering doing so.

Swedish companies are aligned with the European benchmark for policies (73% vs 77%) and a bit above regarding solutions (64% vs 58%).

Three mobility policies are standing out: public transport reimbursement, short or mid term rental vehicles and mobility apps

31% of Swedish companies reimburse public transport expense or consider doing so, **31%** mid term rental vehicles and **30%** mobility apps.

In 2025, private lease/salary sacrifice options have seen a decline, with only 6% of companies offering them, a 13-point drop from the previous year, reflecting a broader European trend.

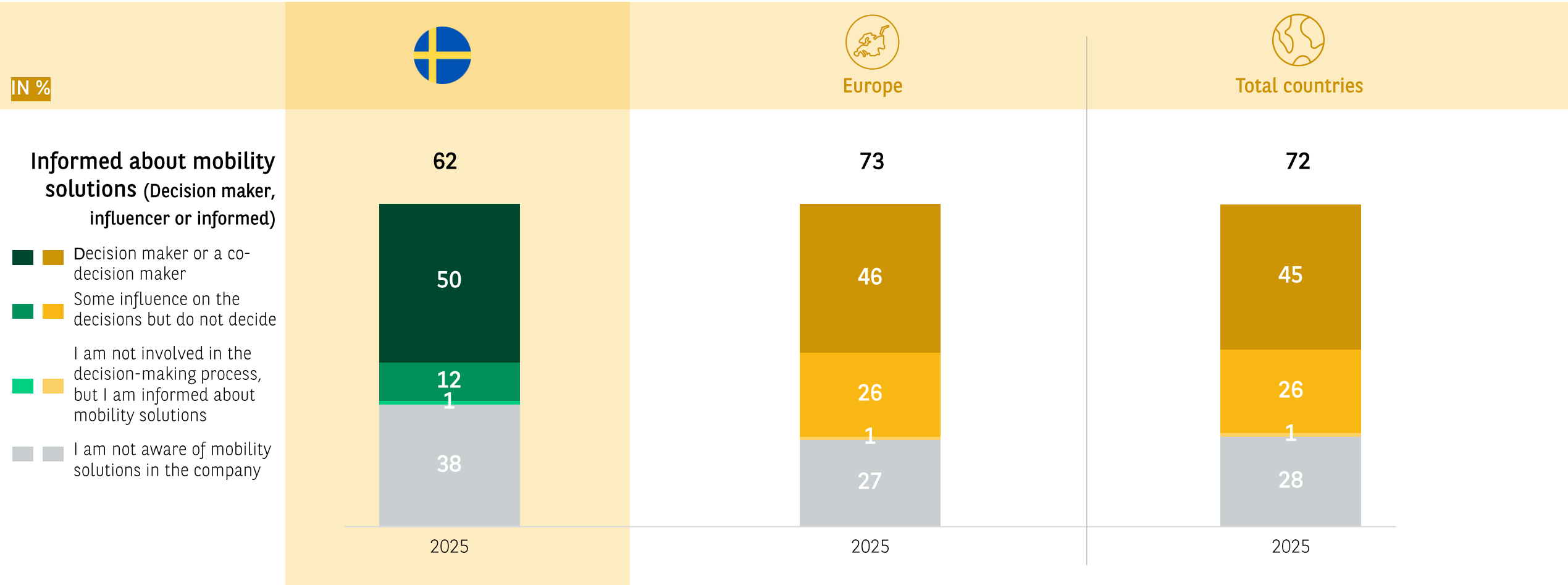
Mobility policies and solutions are motivated by CSR policies and HR related needs

Compliance to CSR policies (**61%** of the companies with policies and **58%** with solutions) and HR-related needs, such as talent acquisition and employee retention (**52%** of the companies with policies and **39%** with solutions), are primary drivers for implementing mobility solutions.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

In Sweden in 2025, 62% of the respondents are informed about mobility solutions.






A12. To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc....)?

Basis: companies with corporate vehicles = 100%

MOBILITY POLICIES IMPLEMENTATION

HOW TO READ THE RESULTS ?

In Sweden in 2025, 31% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.




IN %			
	Europe	Total countries	
	<div><div>Use</div><div>Consider</div></div> Total	<div><div>Use</div><div>Consider</div></div> Total	
At least one mobility policy	<div><div>60</div><div>14</div></div> 73	<div><div>58</div><div>19</div></div> 77	<div><div>56</div><div>23</div></div> 79
Public transport expense reimbursement	<div><div>24</div><div>6</div></div> 31	<div><div>21</div><div>11</div></div> 33	<div><div>20</div><div>13</div></div> 33
Personal vehicle expense reimbursement	<div><div>14</div><div>7</div></div> 20	<div><div>8</div><div>8</div></div> 16	<div><div>8</div><div>10</div></div> 18
Mobility Budget	<div><div>13</div><div>12</div></div> 24	<div><div>16</div><div>12</div></div> 28	<div><div>16</div><div>13</div></div> 29
Private lease or salary sacrifice	<div><div>6</div><div>6</div></div> 12	<div><div>6</div><div>7</div></div> 13	<div><div>6</div><div>9</div></div> 15
A short or mid-term rental vehicle	<div><div>26</div><div>5</div></div> 31	<div><div>18</div><div>10</div></div> 28	<div><div>17</div><div>12</div></div> 29
Car or cash allowance	<div><div>7</div><div>5</div></div> 11	<div><div>18</div><div>12</div></div> 30	<div><div>17</div><div>13</div></div> 30

MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

MOBILITY POLICIES IMPLEMENTATION

HOW TO READ THE RESULTS ?

In Sweden in 2025, 31% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

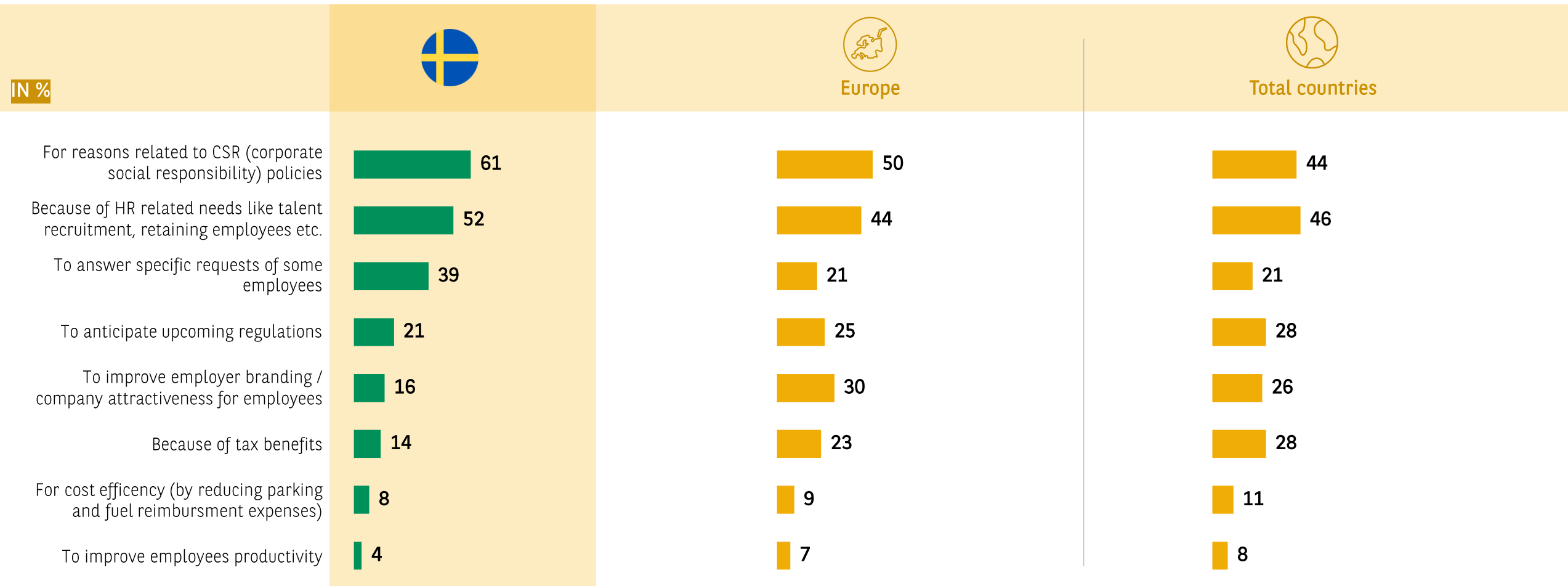
						 Europe			 Total countries		
IN %			2023	2024	2025	2023	2024	2025	2023	2024	2025
New item	Public transport expense reimbursement	Use			24			21			20
		Total			31			33			33
New item	Personal vehicle expense reimbursement	Use			14			8			8
		Total			20			16			18
	Mobility Budget	Use	17	14	13	15	15	16	16	15	16
		Total	24	24	24	26	26	28	28	28	29
	Private lease or salary sacrifice	Use	20	19	6	14	15	6	13	13	6
		Total	28	27	12	24	24	13	24	24	15
	A short or mid term rental vehicle	Use	27	27	26	19	19	18	18	17	17
		Total	35	32	31	28	28	28	28	27	29
	Car or cash allowance	Use	12	5	7	16	17	18	17	17	17
		Total	20	12	11	26	27	30	28	28	30

MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Sweden in 2025, 61% of the companies declare that the main reason for introducing mobility policies is: For reasons related to CSR (corporate social responsibility) policies.






MM14. For what reasons has your company introduced, or does your company intend to introduce, these mobility policies?
Basis: companies using or considering at least one mobility policy

MOBILITY SOLUTIONS IMPLEMENTATION

HOW TO READ THE RESULTS ?

In Sweden in 2025, 26% of the companies are already using Car sharing or are considering doing so in the next 3 years.




IN %		 Europe				 Total countries		
	<div><div></div> Use <div></div> Consider</div>	Total	<div><div></div> Use <div></div> Consider</div>	Total	<div><div></div> Use <div></div> Consider</div>	Total		
At least one mobility solution	<div><div>44</div><div>20</div></div>	64	<div><div>33</div><div>25</div></div>	58	<div><div>32</div><div>28</div></div>	60		
Car sharing	<div><div>15</div><div>11</div></div>	26	<div><div>13</div><div>10</div></div>	23	<div><div>12</div><div>11</div></div>	23		
Ride sharing	<div><div>8</div><div>6</div></div>	14	<div><div>7</div><div>9</div></div>	16	<div><div>7</div><div>11</div></div>	18		
Bike Leasing	<div><div>17</div></div>	9	<div><div>4</div><div>7</div></div>	11	<div><div>4</div><div>8</div></div>	12		
Bike Sharing	<div><div>2</div><div>13</div></div>	15	<div><div>5</div><div>9</div></div>	14	<div><div>5</div><div>10</div></div>	15		
Scooter and moto leasing	<div><div>3</div><div>6</div></div>	9	<div><div>4</div><div>6</div></div>	11	<div><div>4</div><div>8</div></div>	12		
An app provided by the company to book multiple mobility solutions	<div><div>17</div><div>12</div></div>	30	<div><div>11</div><div>10</div></div>	21	<div><div>11</div><div>12</div></div>	23		
A card provided by the company to pay multiple mobility solution	<div><div>12</div><div>11</div></div>	23	<div><div>8</div><div>12</div></div>	20	<div><div>7</div><div>14</div></div>	21		

MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

MOBILITY SOLUTIONS IMPLEMENTATION

HOW TO READ THE RESULTS ?

In Sweden in 2025, 26% of the companies are already using Car sharing or are considering doing so in the next 3 years.

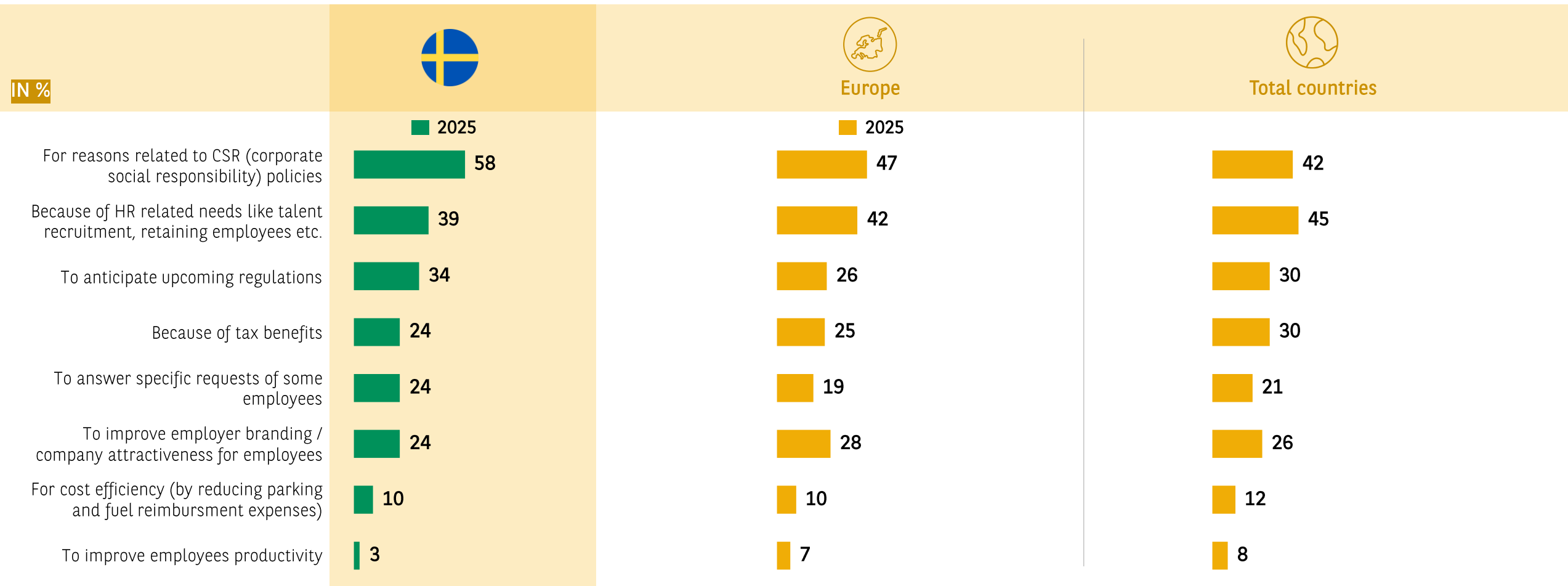
						 Europe			 Total countries		
			2023	2024	2025	2023	2024	2025	2023	2024	2025
			IN %								
Change of definition	Car sharing	Use			15			13			12
		Total			26			23			23
Change of definition	Ride sharing or car pooling	Use			8			7			7
		Total			14			16			18
New item	Bike Leasing	Use			1			4			4
		Total			9			11			12
New item	Bike Sharing	Use			2			5			5
		Total			15			14			15
New item	Scooter and moto leasing	Use			3			4			4
		Total			9			11			12
	An app provided by the company to book multiple mobility solutions	Use	17	15	17	10	10	11	11	10	11
		Total	30	26	30	20	20	21	22	21	23
New item	A card provided by the company to pay multiple mobility solution	Use			12			8			7
		Total			23			20			21

MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Sweden in 2025, 58% of the companies declare that the main reason for introducing mobility solutions is: For reasons related to CSR (corporate social responsibility) policies.



MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions?
Basis: companies using or considering at least one mobility solution

PUBLIC TRANSPORT EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In Sweden in 2025, 31% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

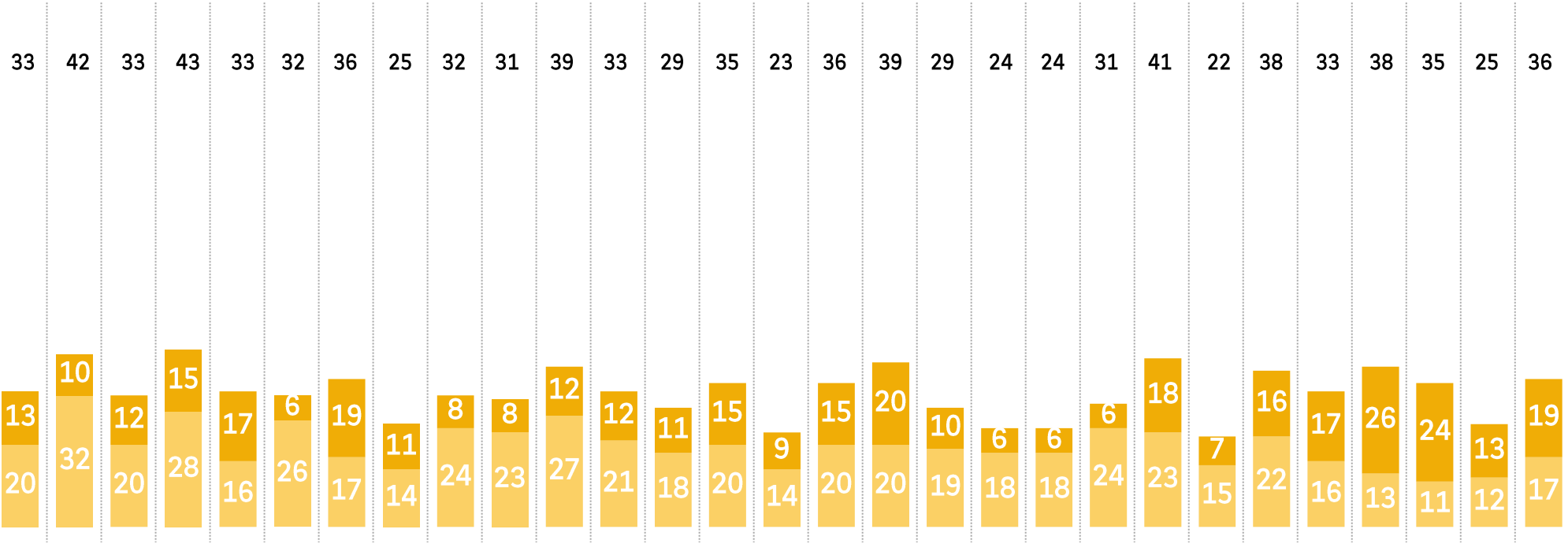
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using

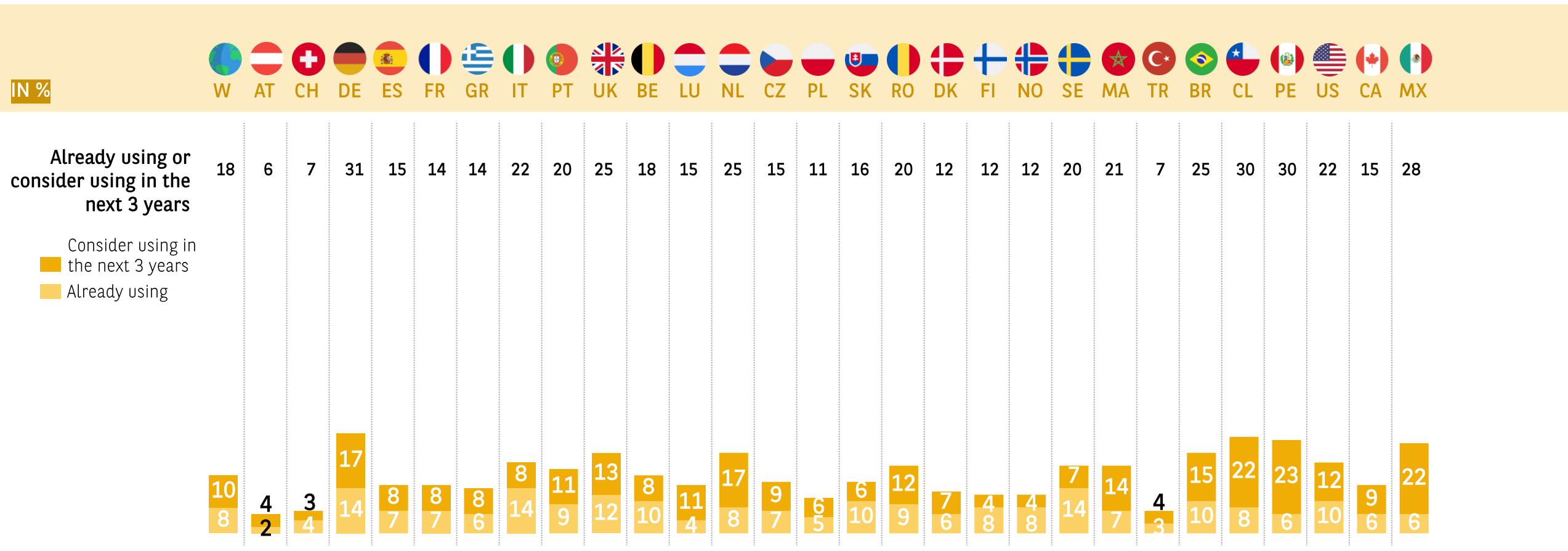


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PERSONAL VEHICLE EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In Sweden in 2025, 20% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

MOBILITY BUDGET

HOW TO READ THE RESULTS ?

In Sweden in 2025, 24% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.

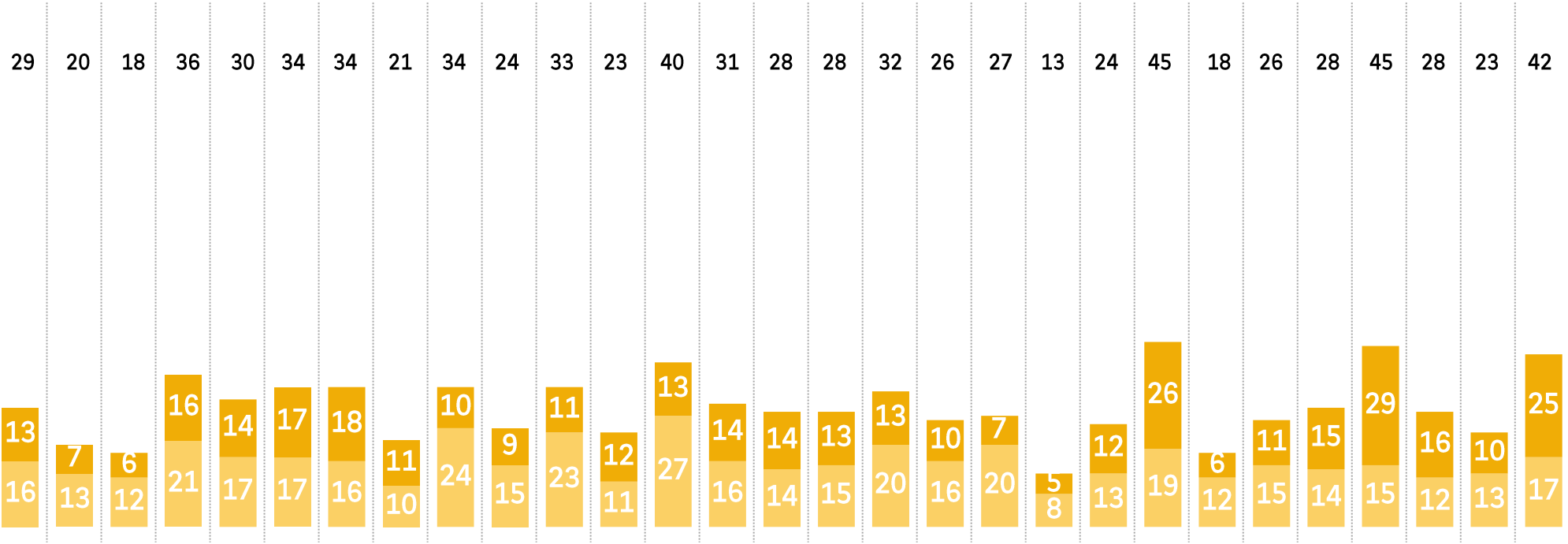
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

In Sweden in 2025, 12% of the companies are already using Private lease or salary sacrifice or are considering doing so in the next 3 years.

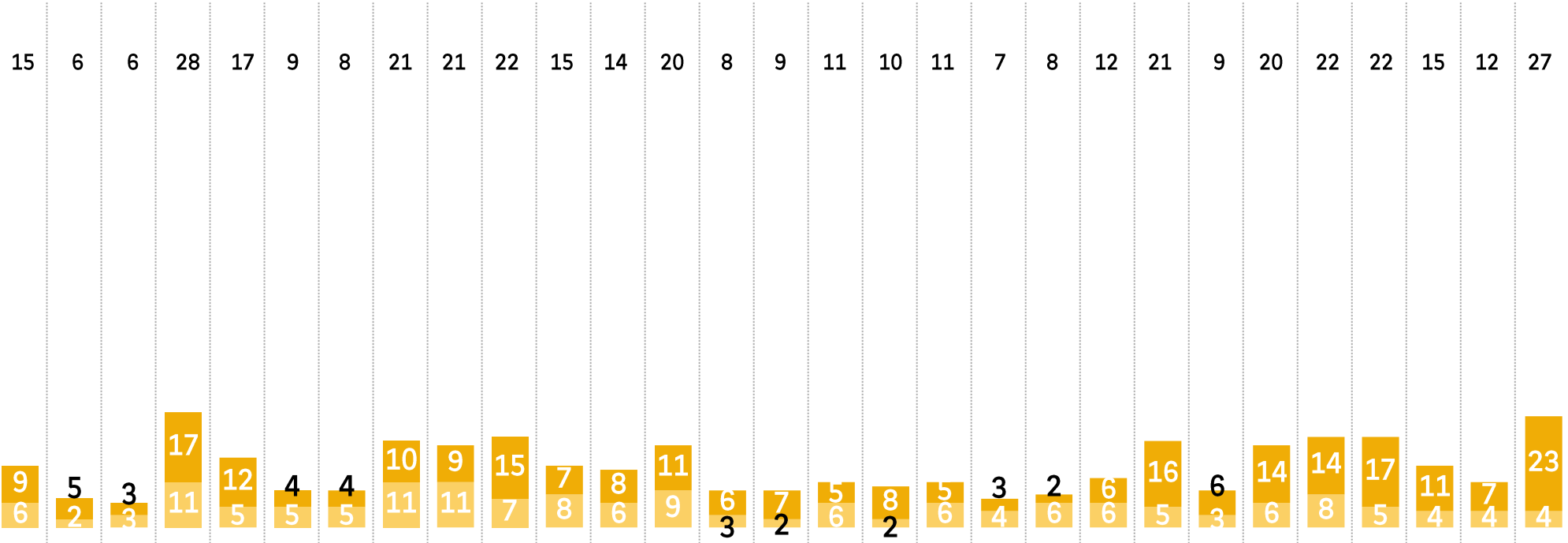
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

SHORT OR MID TERM RENTAL VEHICLE

HOW TO READ THE RESULTS ?

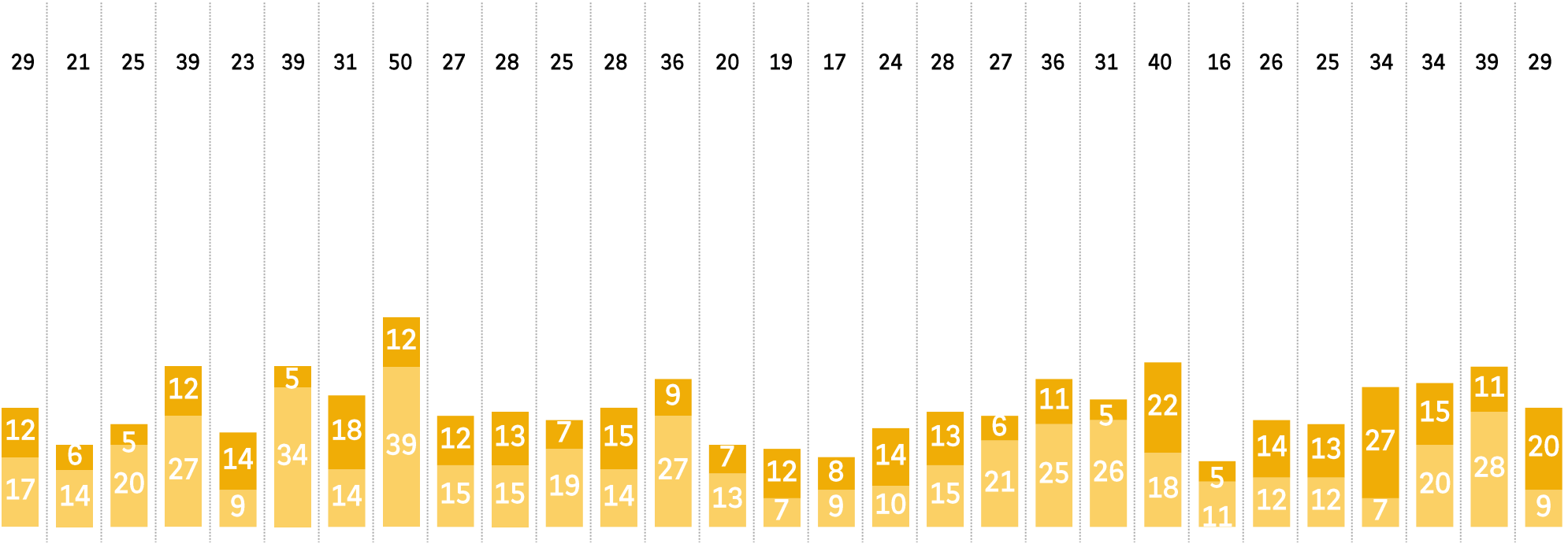
In Sweden in 2025, 31% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

IN %



Already using or consider using in the next 3 years

- Consider using in the next 3 years
- Already using



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR OR CASH ALLOWANCE

HOW TO READ THE RESULTS ?

In Sweden in 2025, 11% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.

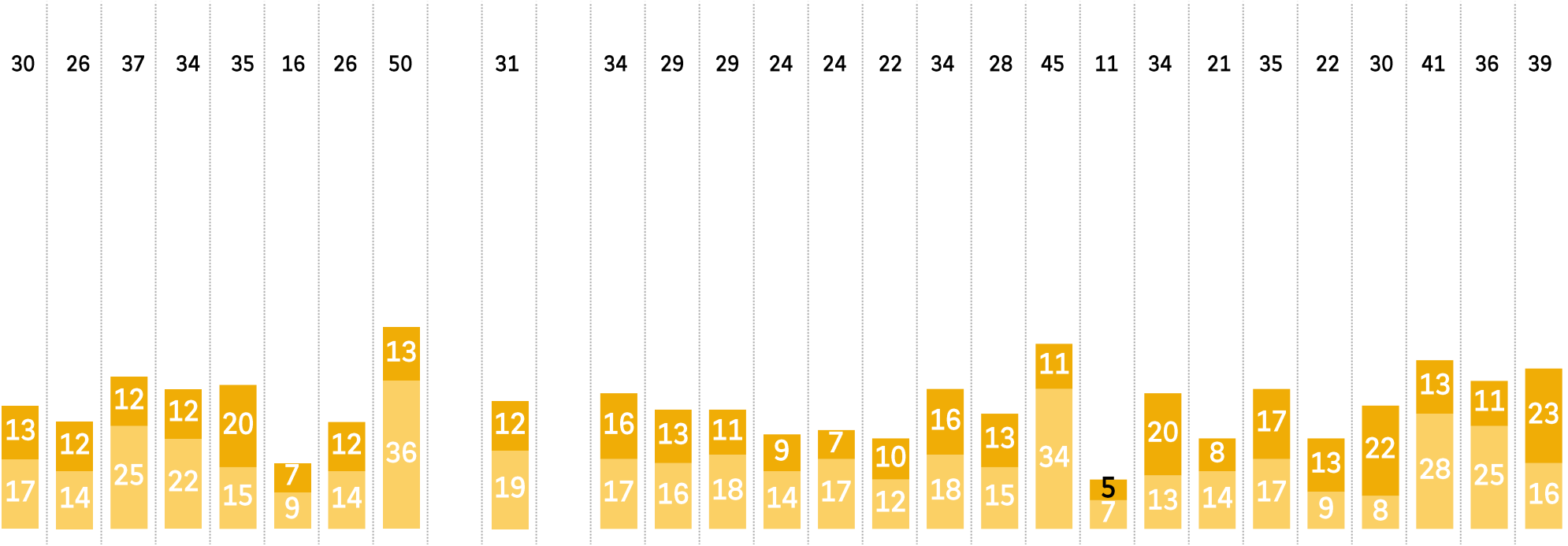
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR SHARING / POOLED VEHICLES

HOW TO READ THE RESULTS ?

In Sweden in 2025, 26% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

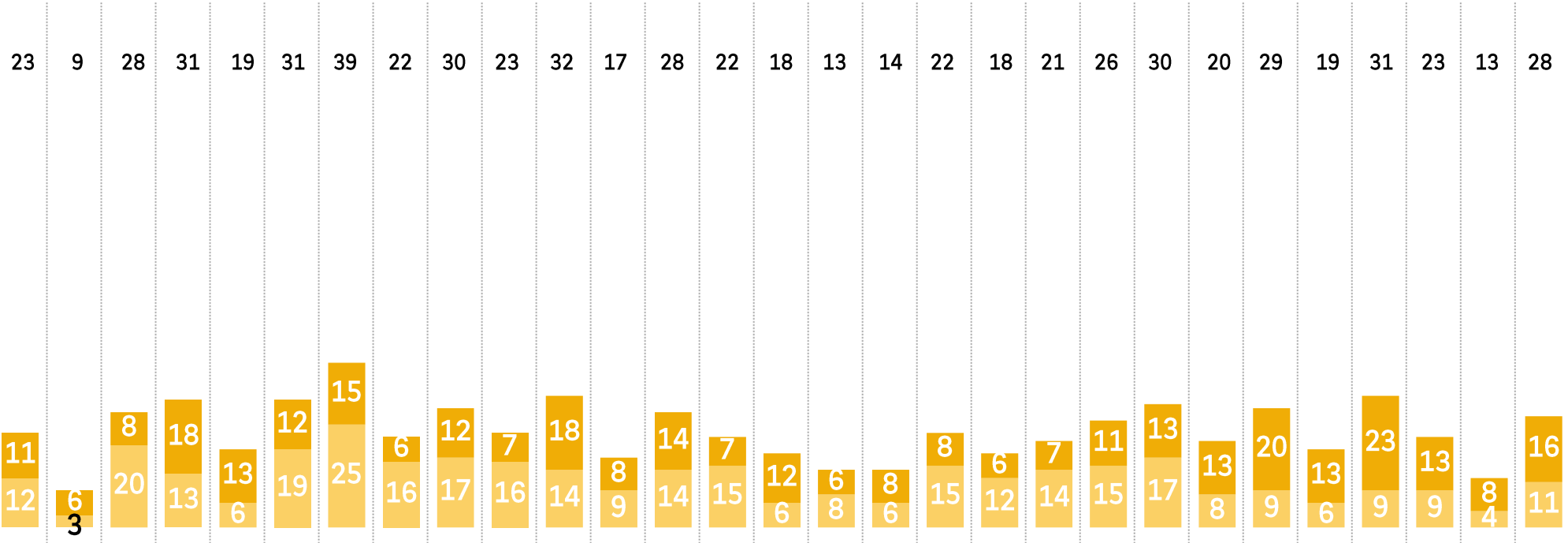
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

RIDE SHARING / CARPOOLING

HOW TO READ THE RESULTS ?

In Sweden in 2025, 14% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.

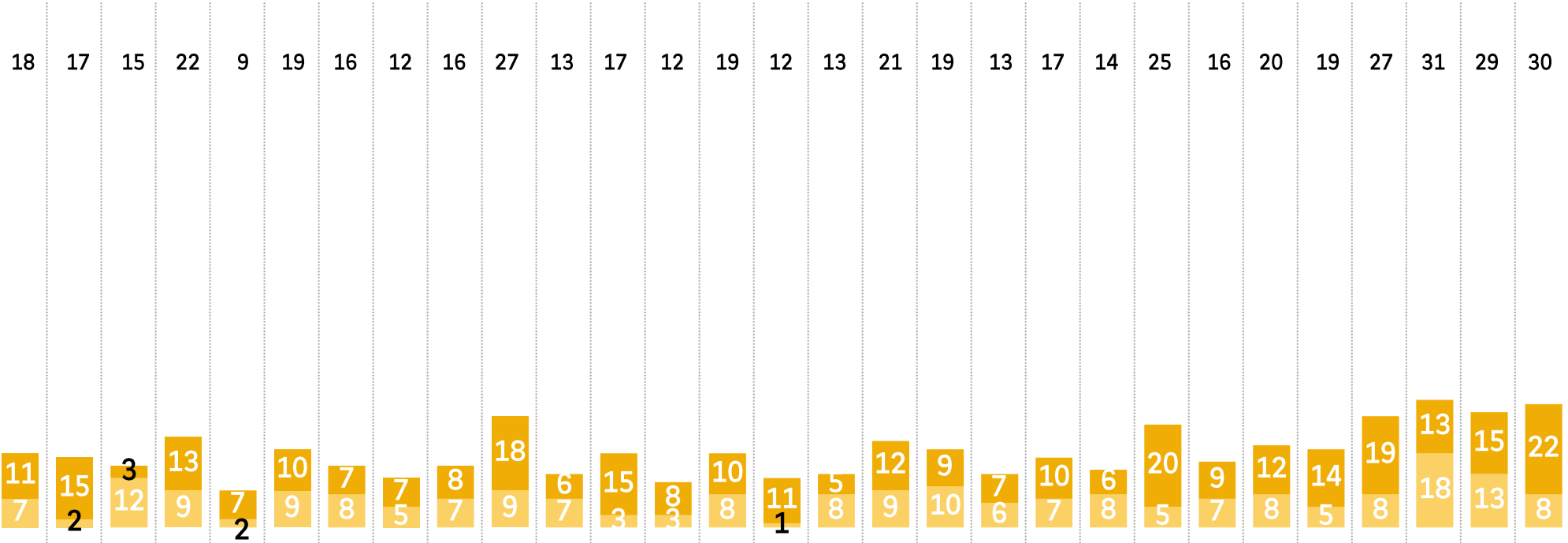
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using

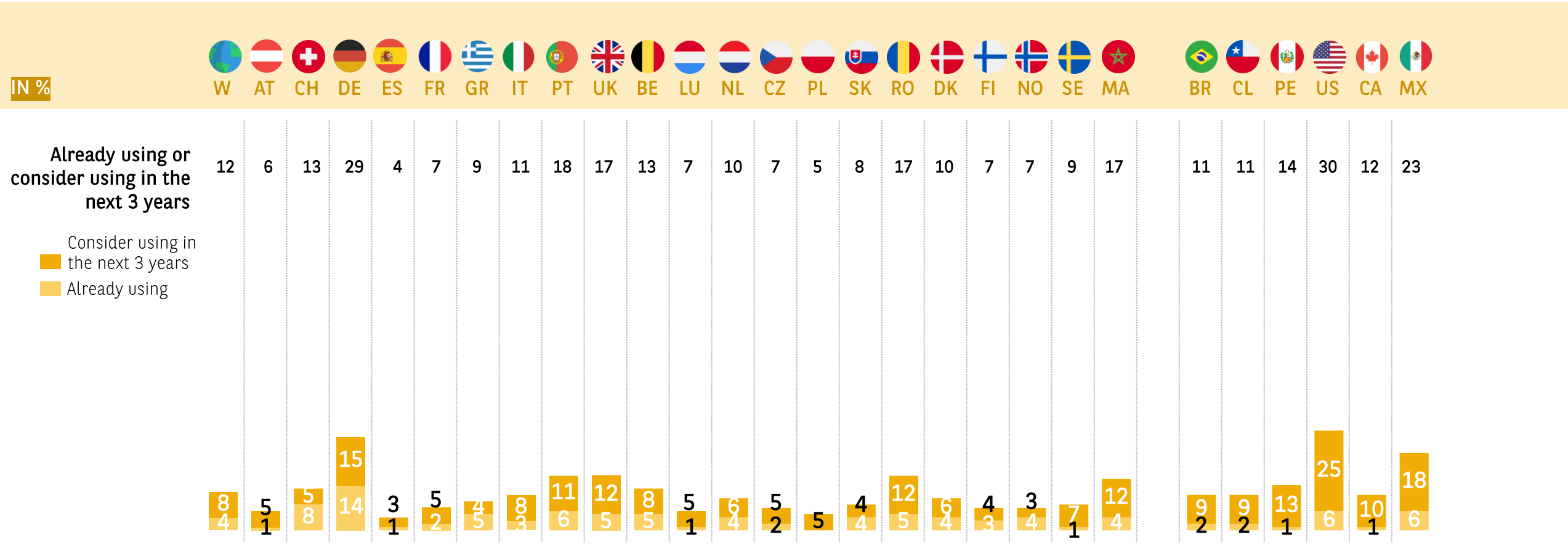


MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

BIKE LEASING

HOW TO READ THE RESULTS ?

In Sweden in 2025, 9% of the companies are already using Bike leasing or are considering doing so in the next 3 years.



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

BIKE SHARING

HOW TO READ THE RESULTS ?

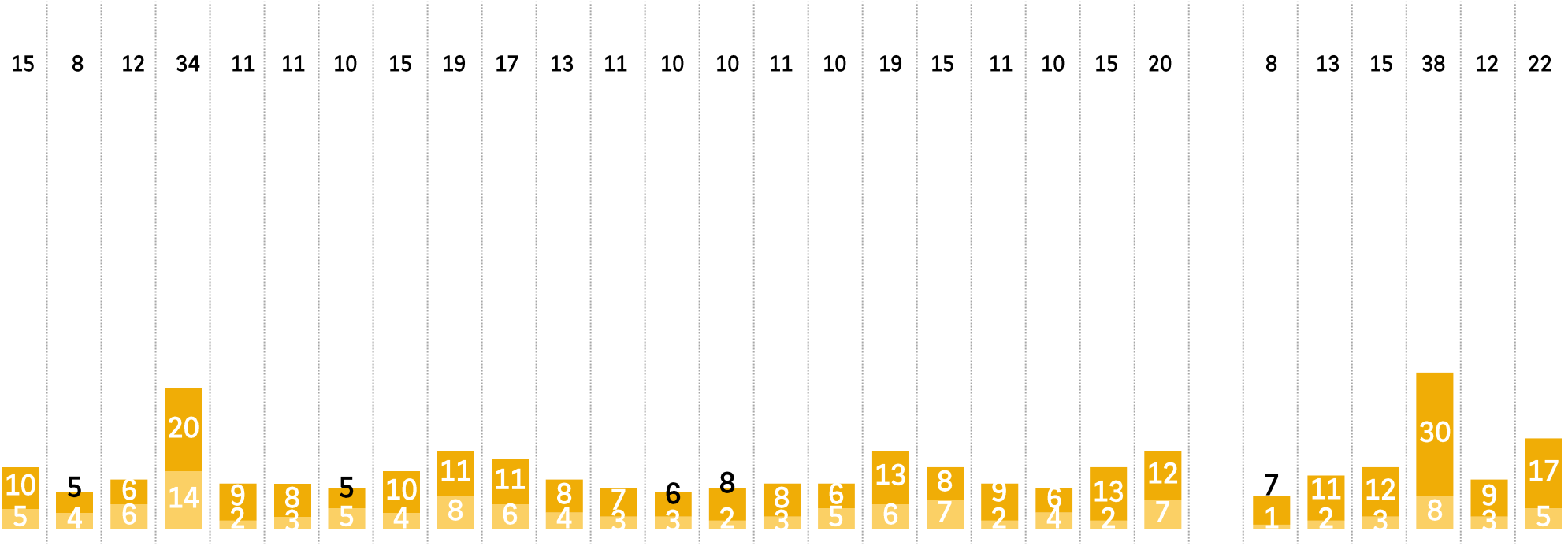
In Sweden in 2025, 15% of the companies are already using Bike sharing or are considering doing so in the next 3 years.

IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years
Already using



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

SCOOTER AND MOTO LEASING

HOW TO READ THE RESULTS ?

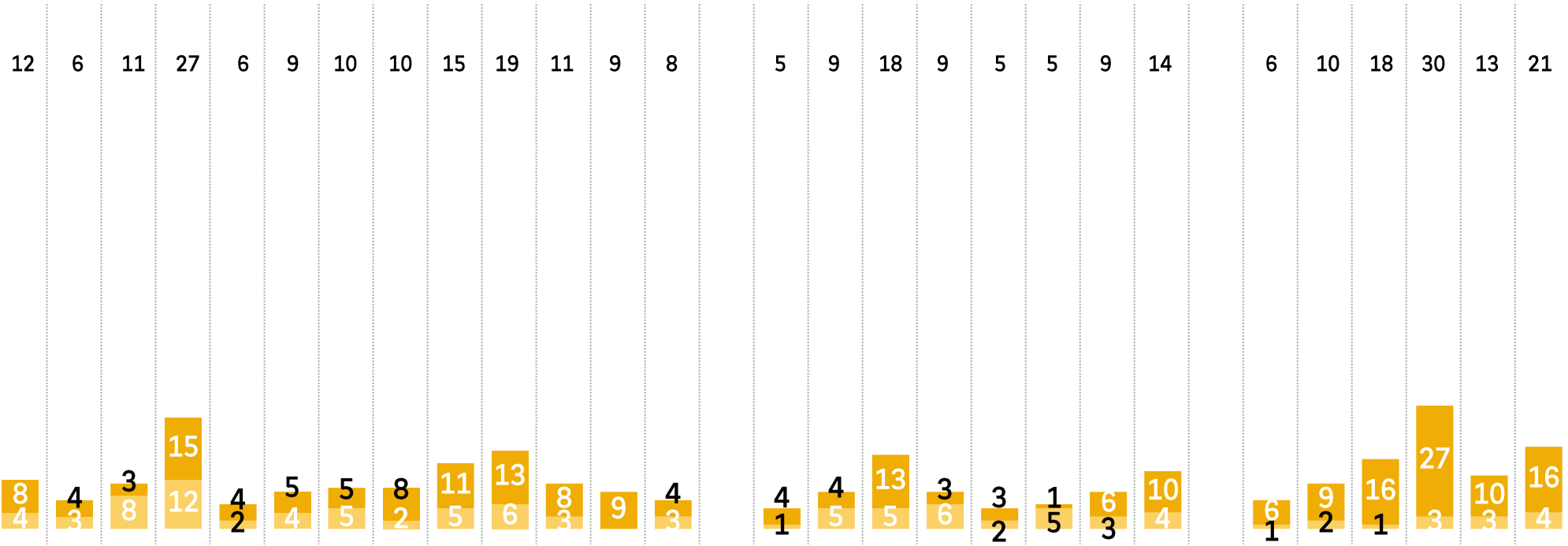
In Sweden in 2025, 9% of the companies are already using Scooter and moto leasing or are considering doing so in the next 3 years.

IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years
Already using



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

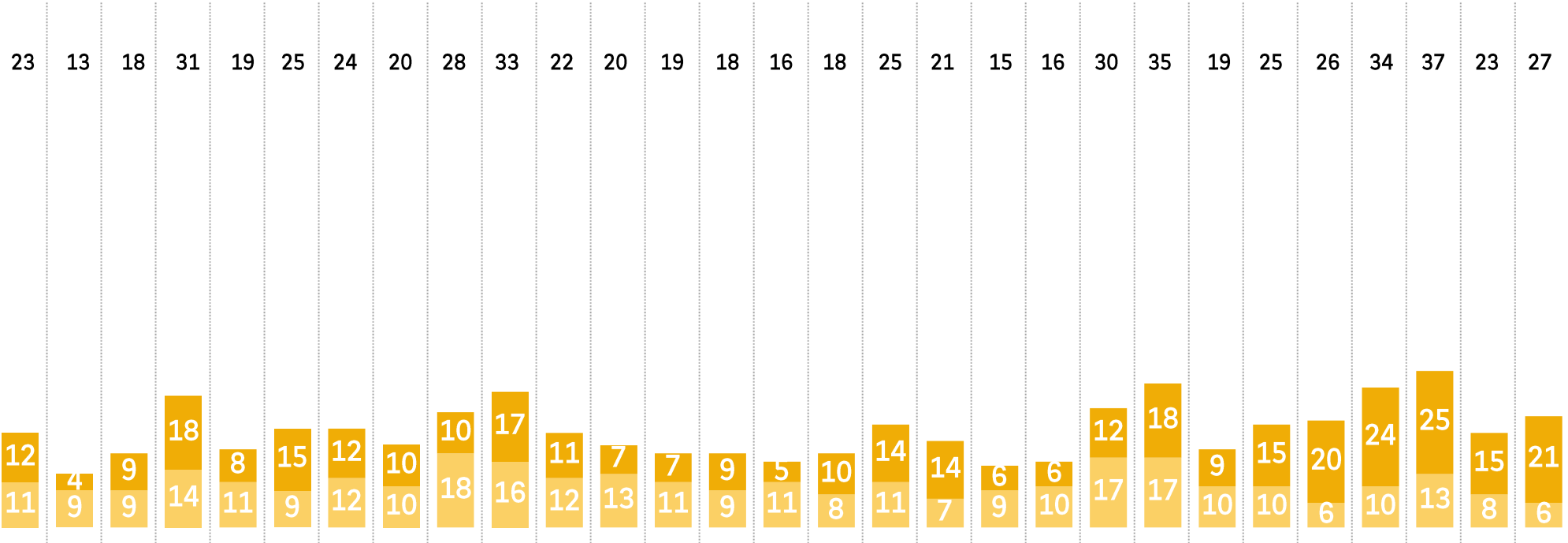
In Sweden in 2025, 30% of the companies are already using An app provided by the company to book multiple mobility solutions or are considering doing so in the next 3 years.

IN %



Already using or consider using in the next 3 years

- Consider using in the next 3 years
- Already using



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

A CARD PROVIDED BY THE COMPANY TO PAY MULTIPLE MOBILITY SOLUTION

HOW TO READ THE RESULTS ?

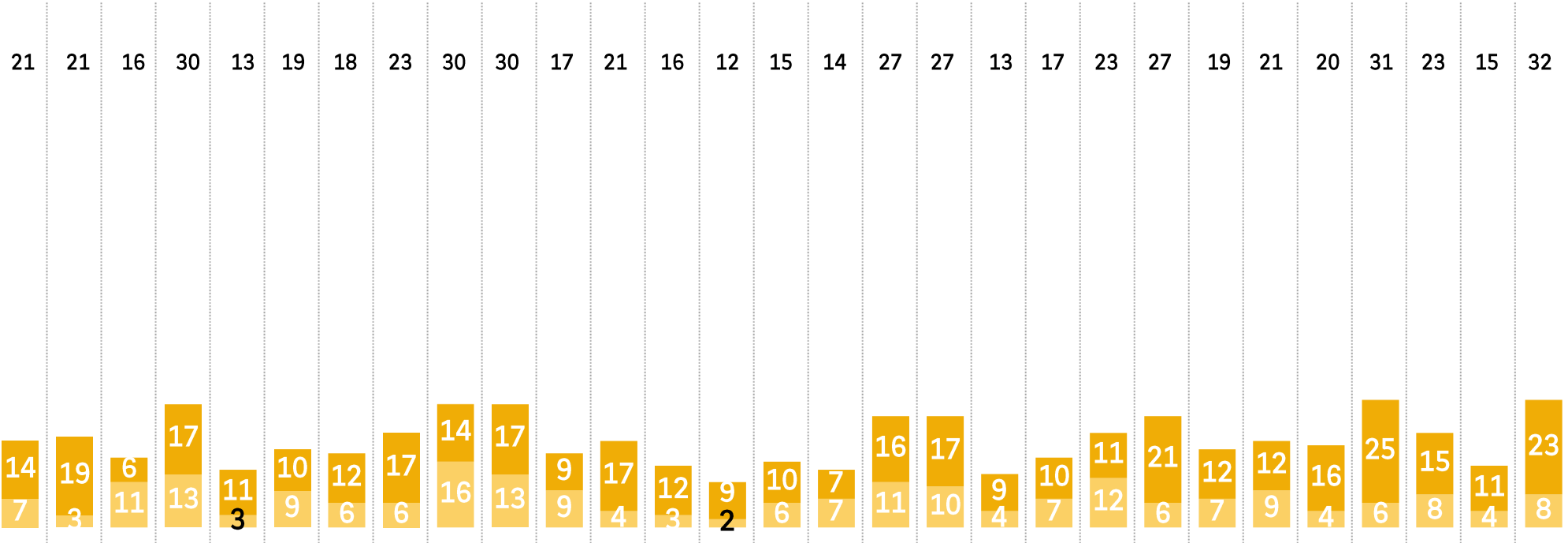
In Sweden in 2025, 23% of the companies are already using A card provided by the company to pay multiple mobility solution or are considering doing so in the next 3 years.

IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years
Already using



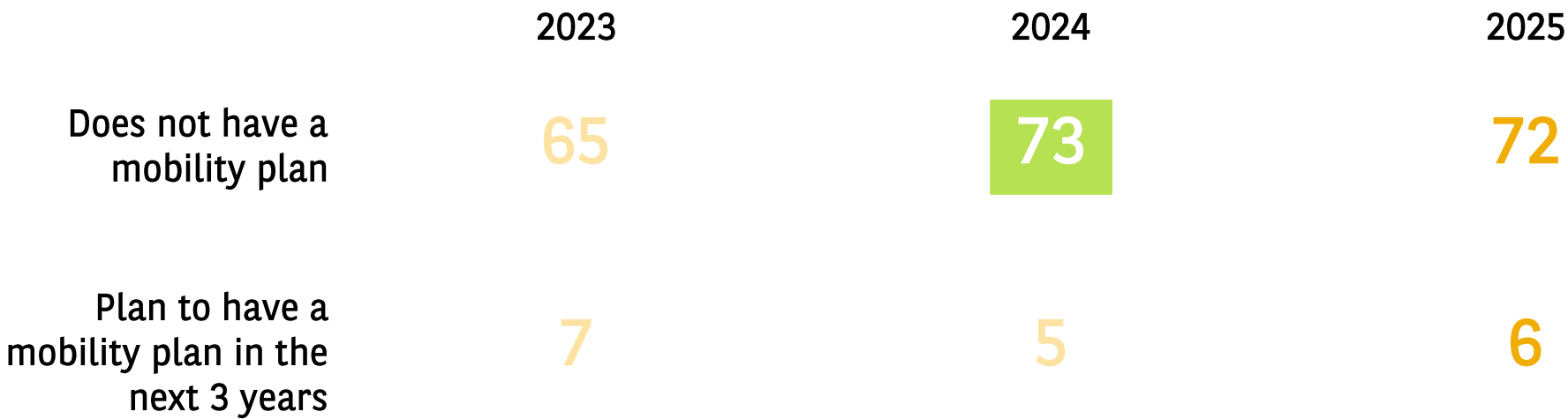
MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In 2025, 72% of the companies do not have a mobility plan. Among them, 6% intend to have one in the next three years.

Local question

IN %



ES2. Does your company have a Mobility Plan?
Basis: companies with corporate vehicles = 100%
ES4. Is it in your plans to have a mobility plan in the next 3 years?
Basis: companies that don't have a Mobility plan

X% Significantly higher/lower vs. previous wave

An aerial photograph of a dense urban landscape, likely Shanghai, featuring a mix of modern glass skyscrapers and older buildings, with green parks interspersed throughout the city.

6

FUTURE CHALLENGES

What are the future challenges for fleet
management in the coming years?

Only a minority of Swedish companies have set targeted decarbonization goals to date

13% of Swedish companies have targeted decarbonization goals, but **23%** are currently evaluating such goals, showing a growing awareness of corporate decarbonization – with rather consistent results with the European average. However, bigger companies tend to be more reluctant to consider such objectives.

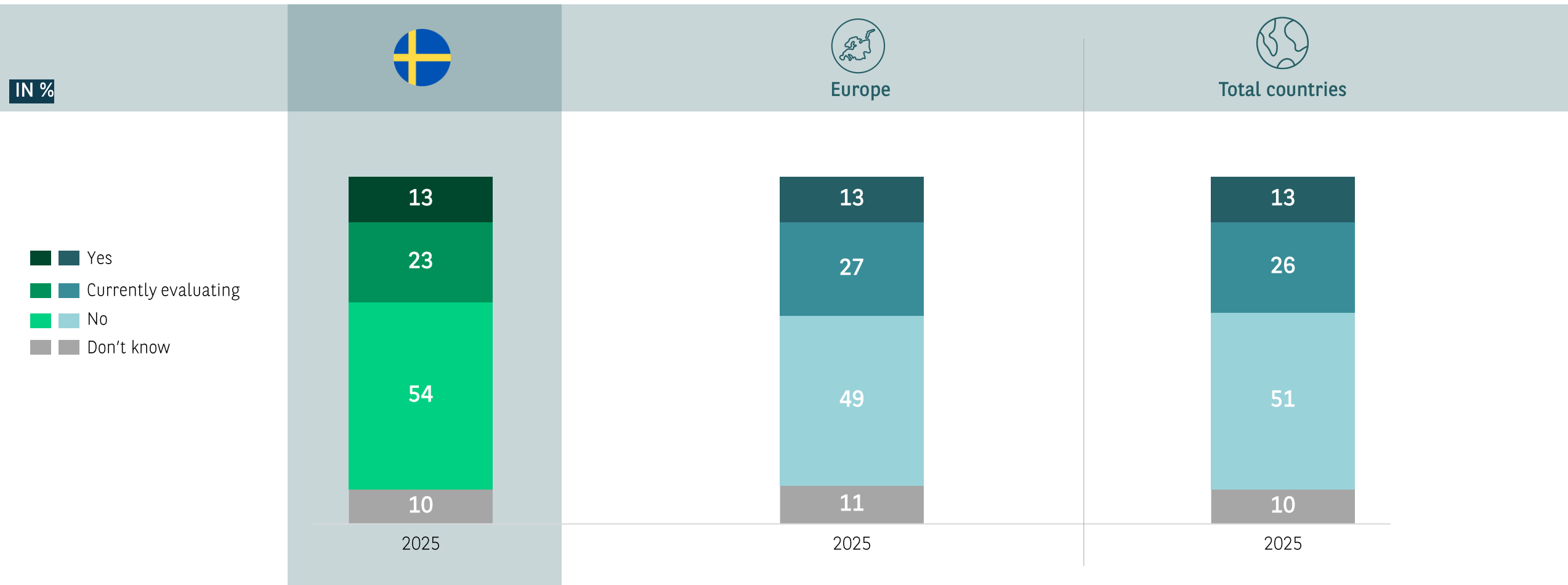
A significant weight of employee mobility: of those with decarbonization targets, **22%** consider employee mobility is a significant factor and 40% a moderate factor.

For Swedish fleet managers, future fleet challenges are focused on adapting to restrictive public policies on ICE and promoting responsible driving

Adapting to restrictive public policies on ICE (**28%**) and Inducing more responsible driving (**27%**) are the top challenges for fleet managers, with a similar ranking compared to the previous year.

HOW TO READ THE RESULTS ?

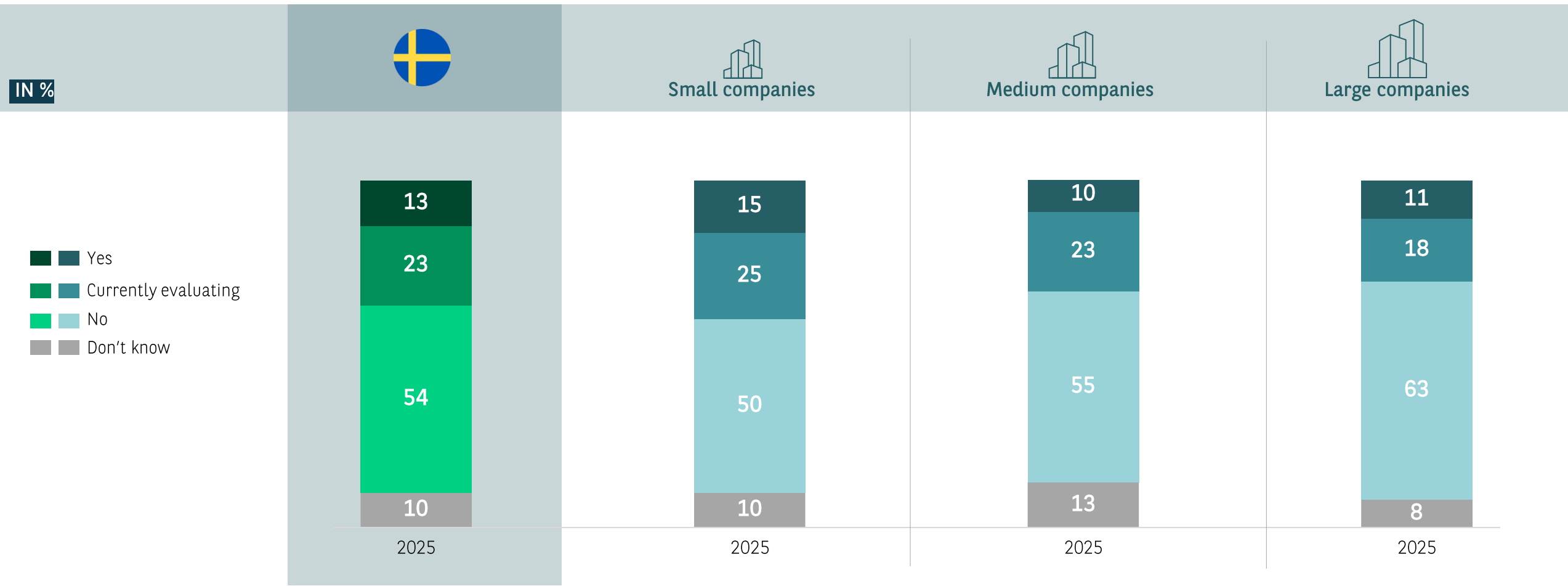
In Sweden in 2025, 13% of the companies have targeted decarbonization goals.



A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Sweden in 2025, 13% of the companies have targeted decarbonization goals.

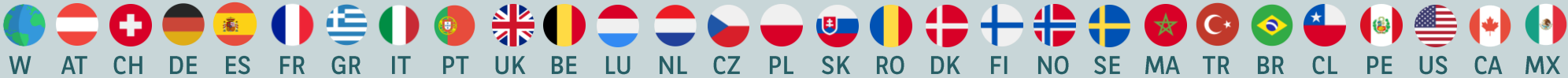


A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

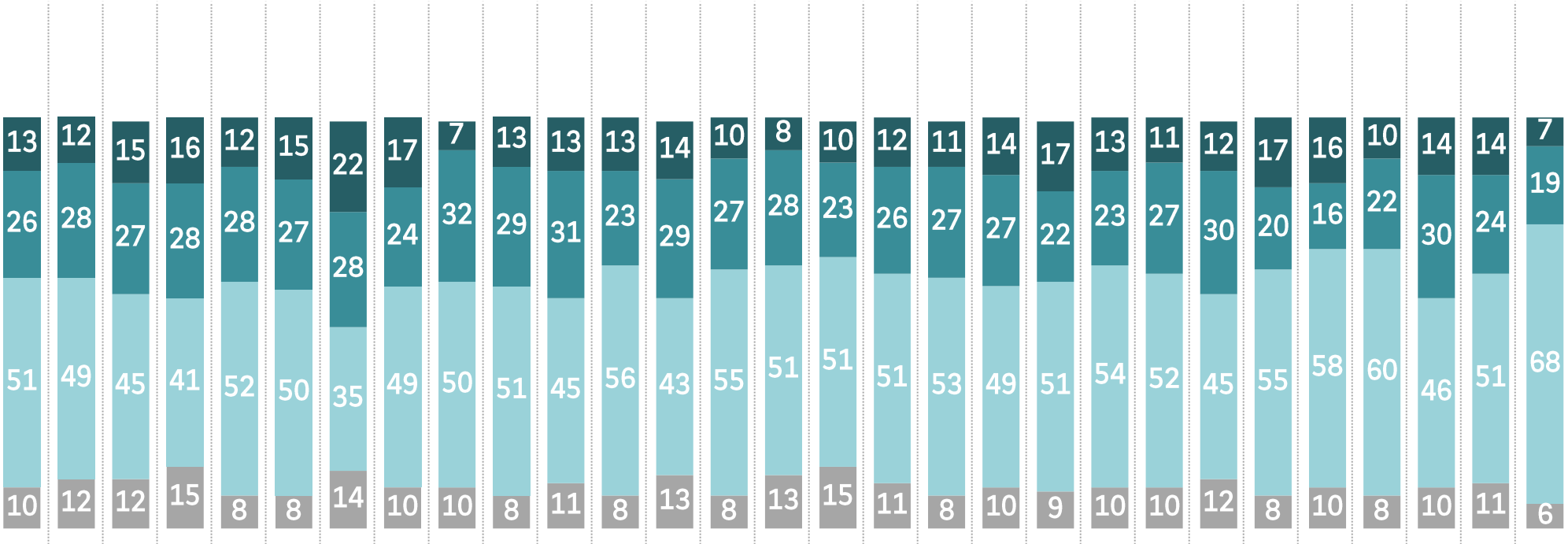
HOW TO READ THE RESULTS ?

In Sweden in 2025, 13% of the companies have targeted decarbonization goals.

IN %



Yes
Currently evaluating
No
Don't know



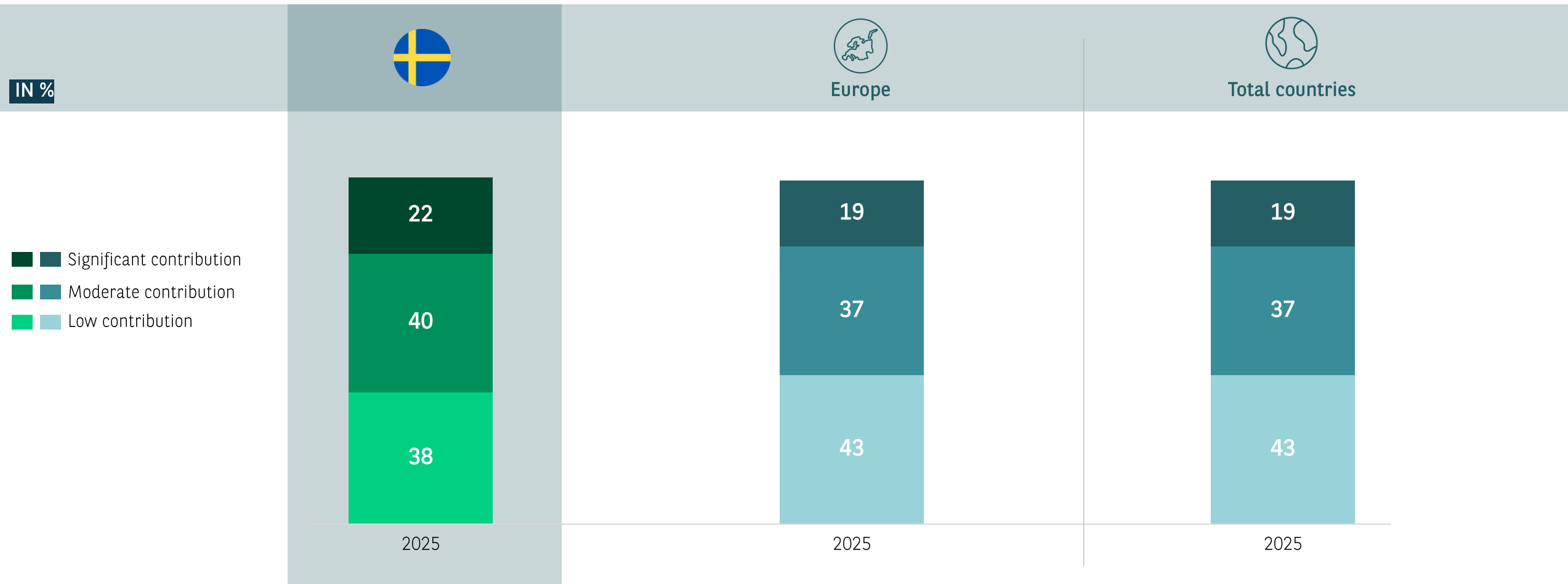
A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

New question

HOW TO READ THE RESULTS ?

In Sweden in 2025, 22% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.



A57. How would you rate the contribution of employees mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

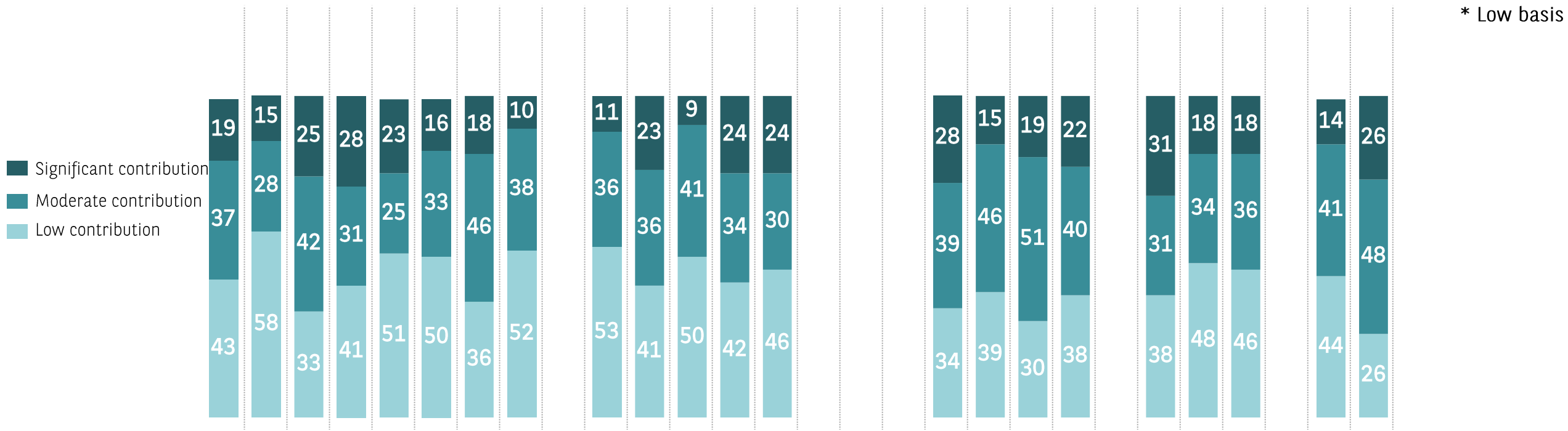
IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

New question

HOW TO READ THE RESULTS ?

In Sweden in 2025, 22% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

IN %

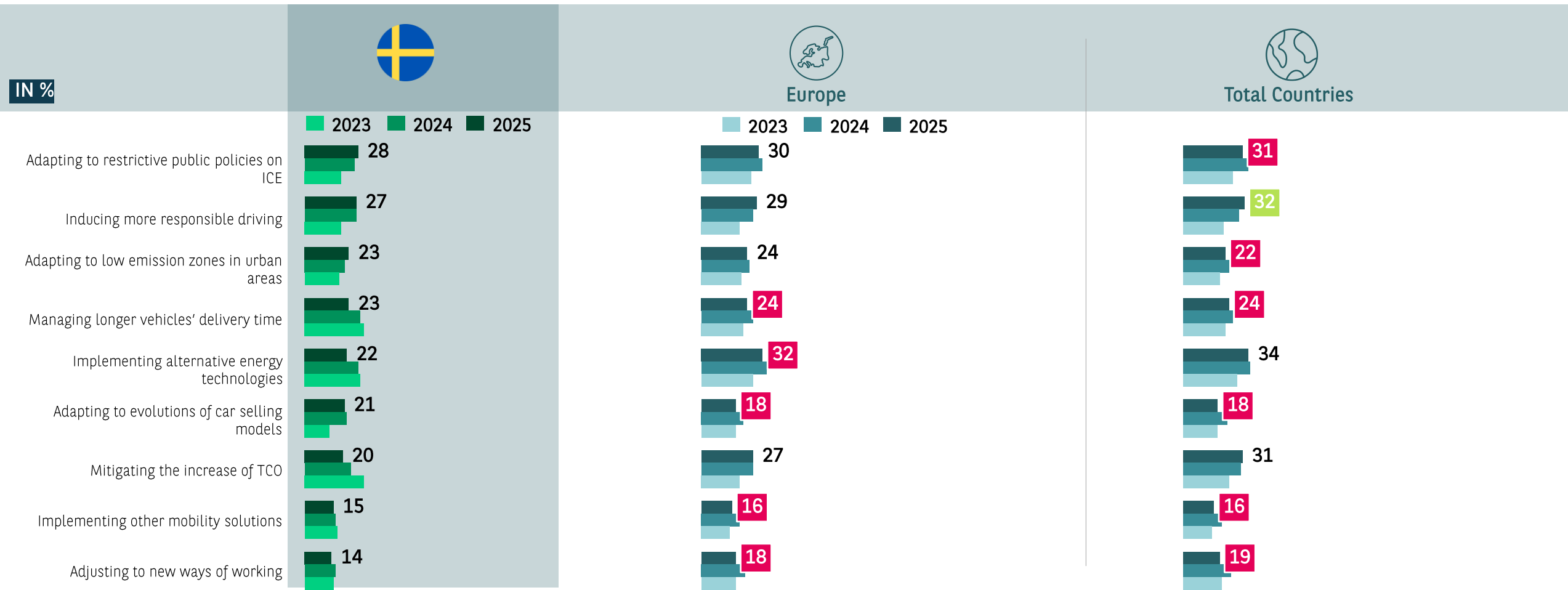


A57. How would you rate the contribution of employees mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Sweden in 2025, 28% of the companies declare that Adapting to restrictive public policies on ICE is top 1 challenge for fleet management in the next 3 years.



A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Sweden in 2025, 28% of the companies declare that Adapting to restrictive public policies on ICE is top 1 challenge for fleet management in the next 3 years.

1st challenge
2nd challenge
3rd challenge



IN %	W	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX
Adapting to restrictive public policies on ICE	31	28	28	35	24	42	24	31	37	32	43	32	30	25	22	29	40	29	30	22	28	31	30	41	41	31	31	25	34
Inducing more responsible driving	32	23	19	42	32	41	25	27	28	39	36	33	24	24	25	22	27	30	21	25	27	26	23	52	44	54	44	35	42
Adapting to low emission zones in urban areas	22	19	25	20	20	36	23	19	25	32	30	20	21	26	22	22	28	24	21	22	23	19	21	1	21	16	27	16	11
Managing longer vehicles' delivery time	24	28	24	24	24	36	23	21	20	23	35	27	24	22	18	23	19	25	22	27	23	15	25	17	17	18	27	39	13
Implementing alternative energy technologies	34	32	30	38	26	47	29	25	37	46	39	27	26	29	26	26	38	29	37	28	22	29	29	44	43	47	33	31	51
Adapting to evolutions of car selling models	18	20	21	19	19	11	23	20	12	13	20	18	21	17	19	17	15	17	26	15	21	18	19	31	26	10	13	16	16
Mitigating the increase of TCO	31	28	25	27	26	34	25	32	28	48	16	28	23	22	23	28	31	23	22	29	20	34	22	43	35	51	39	52	56
Implementing other mobility solutions	16	13	11	23	16	19	19	15	16	9	19	16	11	17	18	13	15	23	22	19	15	18	12	8	30	14	7	12	10
Adjusting to new ways of working	19	14	14	29	16	12	19	19	11	10	31	20	19	25	18	20	17	22	16	16	14	24	21	40	27	16	12	18	18

A11. According to you, what will be the three main challenges for fleet management in the next 3 years?

Basis: companies with corporate vehicles = 100%

APPENDIX



Vehicles in fleets

- **PC:** Passenger Cars
- **LCVs:** Light Commercial Vehicles
- **Second-hand vehicles:** Vehicles that were not new when acquired. "Not new" means already used by others outside the company. It does not consider 0 km pre-registered cars from dealers/OEMs.

Financing methods

- **Operational Leasing / Full Service Leasing with residual value risk for the lessor:** a service which, in exchange for a monthly rental, enables the customer to have a vehicle for a defined amount of time and mileage with associated optional services. The customer chooses the vehicle along with the associated optional services such as maintenance, insurance, fuel management, breakdown and replacement vehicle, tyre replacement...
- **Financial leasing with residual value risk for the lessee:** can be defined as renting a vehicle with the possibility to buy it at the end of the contract, for a price agreed at the beginning of the contract

Alternative Energy Technologies

- **BEV (Battery Electric Vehicle):** Powered only by electricity using energy stored in rechargeable batteries
- **PHEV (Plug-in Hybrid):** Combines a petrol or diesel engine with an electric motor and a battery that can be recharged by plugging into an electrical outlet
- **HEV (Hybrid):** Combines a petrol or diesel engine with an electric motor and small battery, with no possibility to recharge by plugging into an electrical outlet
- **Hydrogen Fuel cell:** Uses hydrogen fuel for motive power (not related to pilot test of a vehicle)

Telematics

- **Telematics** enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of a car manufacturer box or by an after sales box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.

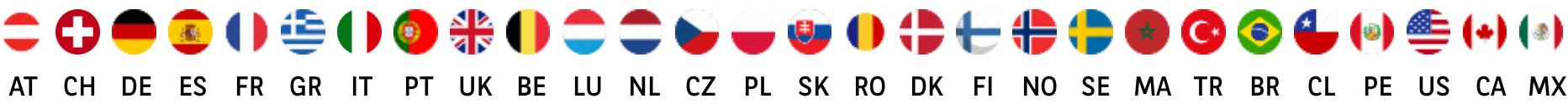
Mobility policies

- **Public transport expense reimbursement** (partial or total)
- **Personal vehicle expense reimbursement** (partial or total)
- **Mobility Budget**: predefined budget granted by the employer allowing employees to choose their mode of transport
- **Private lease or salary sacrifice**: private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer
- **A short or mid-term rental vehicle** to provide mobility for an employee
- **Car or cash allowance**

Mobility solutions

- **Car sharing or pooled/unassigned vehicles**: a pool of cars put at your disposal by your company that can be booked and used for professional or personal use.
- **Ride sharing**: arranging for travel between several parties in a private vehicle driven by its owner, free or for a fee, by means of a website or app provided by your company
- **Car pooling**: meaning in exchange for a payment
- **Bike Leasing**: solution provided by the company
- **Bike Sharing**: solution provided by the company
- **Scooter and moto leasing**: solution provided by the company
- **An app** provided by the company to book multiple mobility solutions
- **A card** provided by the company to pay multiple mobility solution

COMPANY SIZE SEGMENT DEFINITION



Small companies	Less than 99 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
	100 - 249 empl.	●				●				●				●		●	●	●	●	●	●		●	●			●
Medium companies	100 - 499 empl.		●		●			●		●		●	●	●		●							●				●
	100 - 999 empl.			●		●		●		●															●		
Large companies	250 empl. or more	●				●				●					●		●	●	●	●	●	●		●	●		●
	500 empl. or more		●		●			●		●		●	●	●		●							●				●
	1000 empl. or more			●		●		●		●															●		

THANK YOU

