

FLEET AND MOBILITY BAROMETER 2025

COUNTRY REPORT



1 FLEET CHARACTERISTICS

2 FINANCING METHODS

3 ENERGY MIX

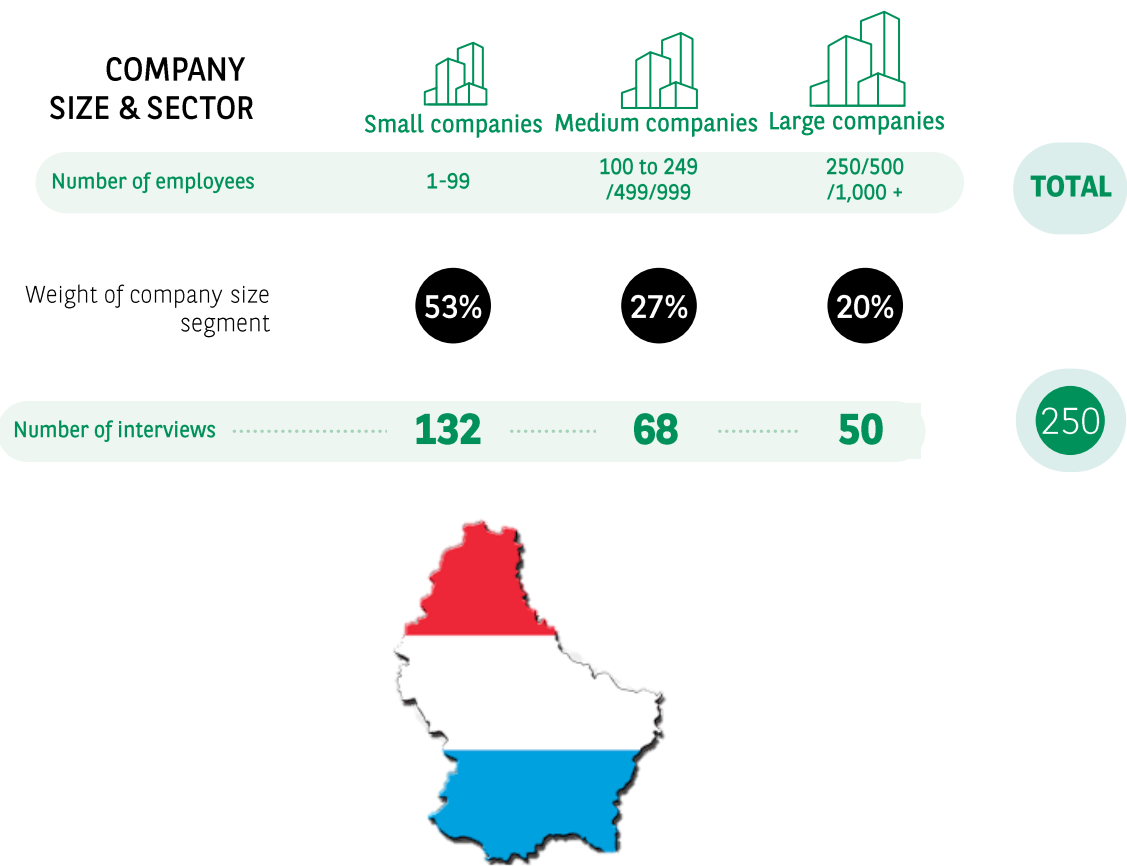
4 CONNECTED FLEETS

5 EMPLOYEE MOBILITY

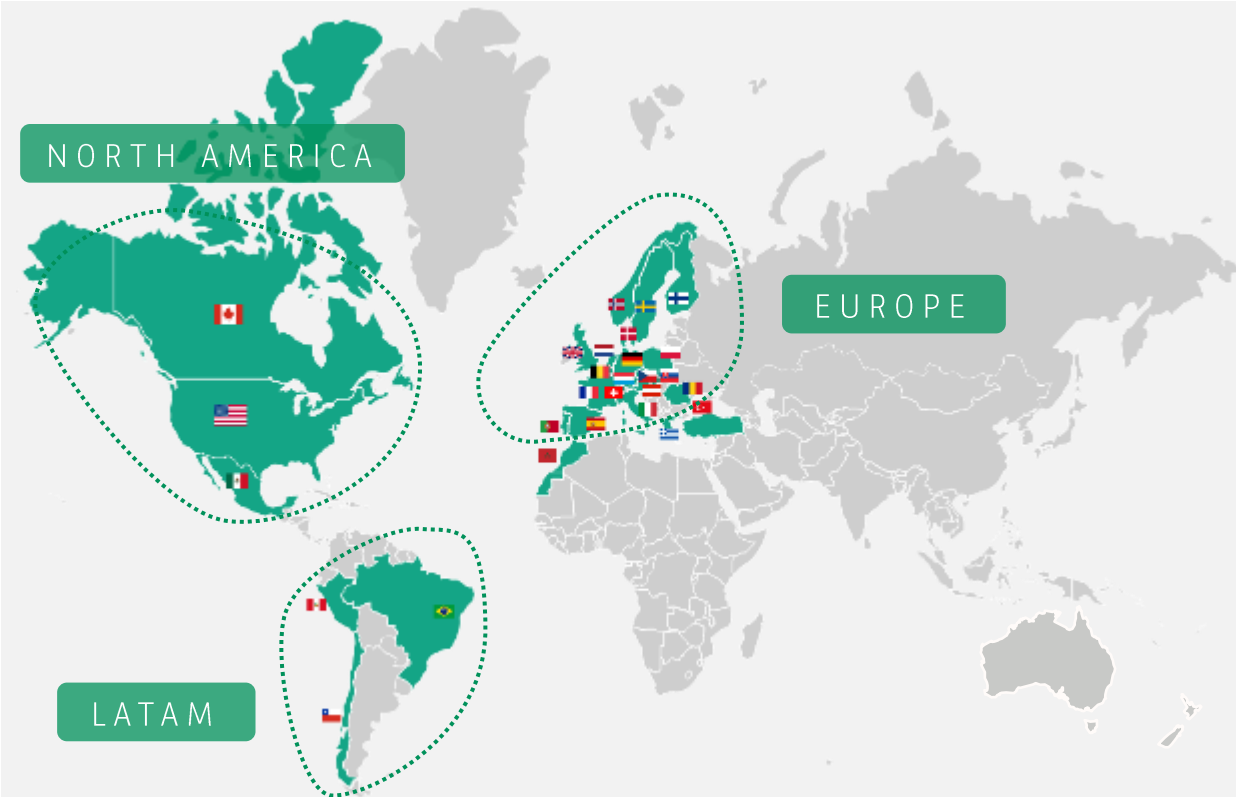
6 FUTURE CHALLENGES

SAMPLE STRUCTURE AND SCOPE

QUOTAS ON COMPANY SIZE & INDUSTRY



28 COUNTRIES - 3 REGIONAL BENCHMARKS



Morocco and Turkey : compared with Europe benchmark



01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?



Despite persistent global uncertainties, most Luxembourg companies remain confident about the future of their fleets



TREND

NEXT
3 YEARS

anticipate that their fleet will
either **remain stable** or **grow**
(with 22% expecting growth)

ADDITIONAL INFORMATION

41%

include **second-hand vehicles**, mainly used as pool cars or tool cars among passenger cars fleets

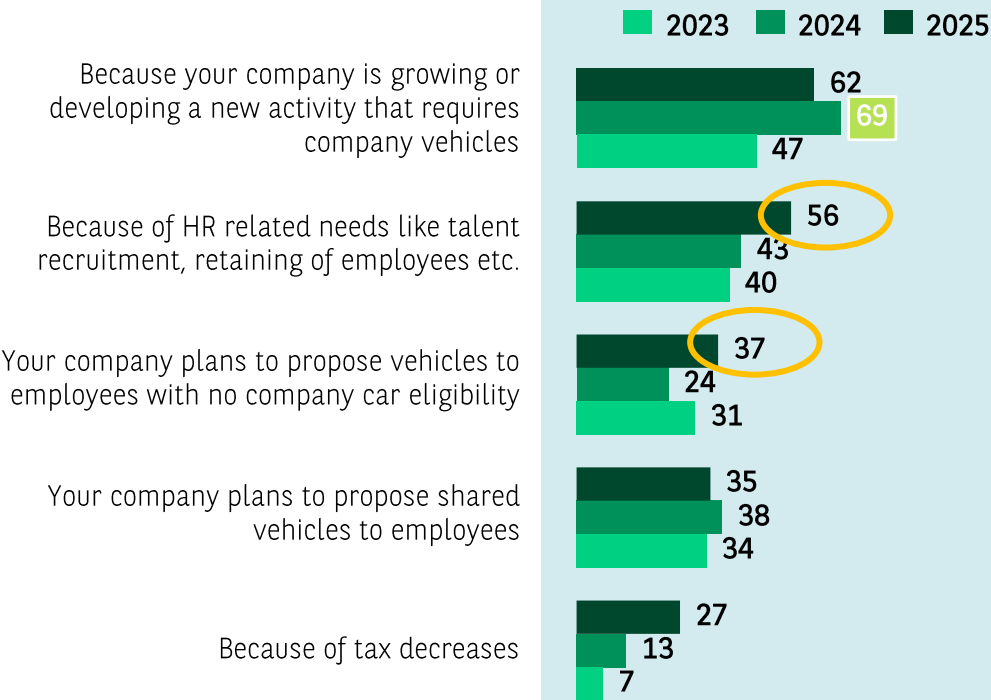
REASONS FOR FUTURE FLEET INCREASE

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 62% of the companies expecting an increase of their fleet explain it by: Because your company is growing or developing a new activity that requires company vehicles.



IN % PASSENGER CARS + LCVS



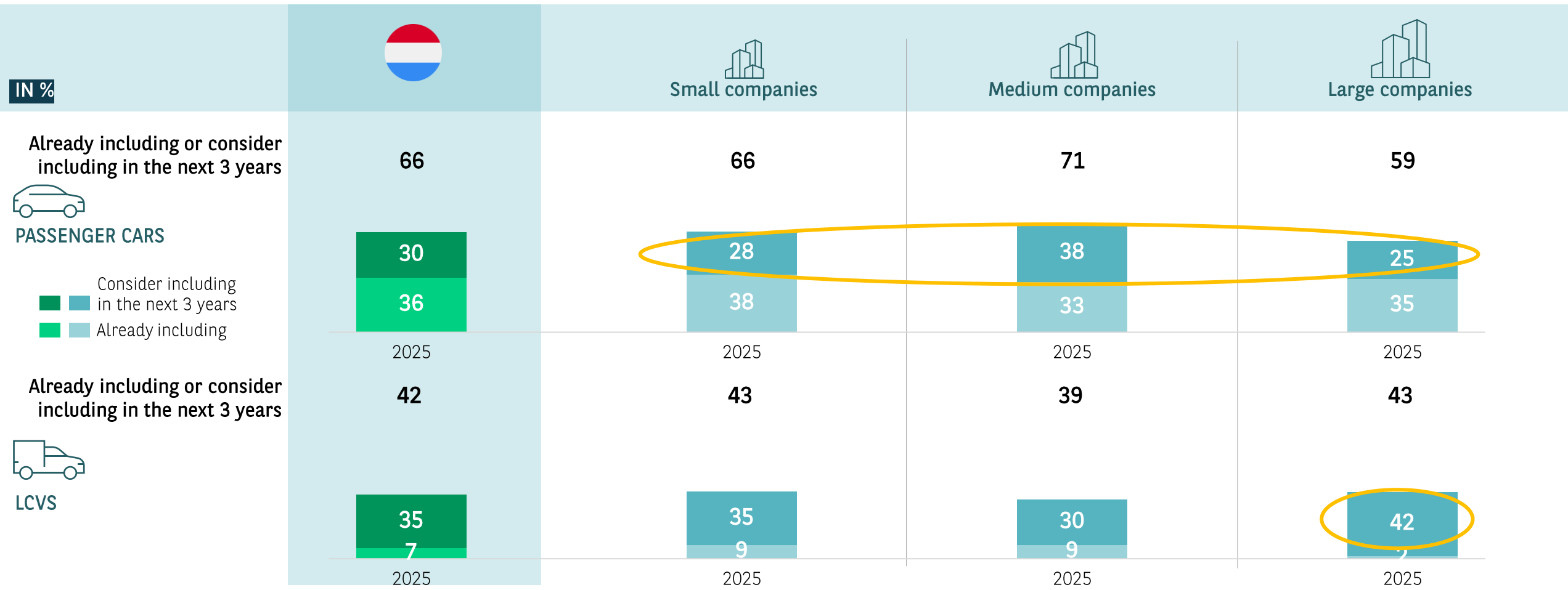
A8A. Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 66% of the companies are already including or are considering including passenger cars that were not new when acquired.
42% of the companies are already including or are considering including LCVs that were not new when acquired.

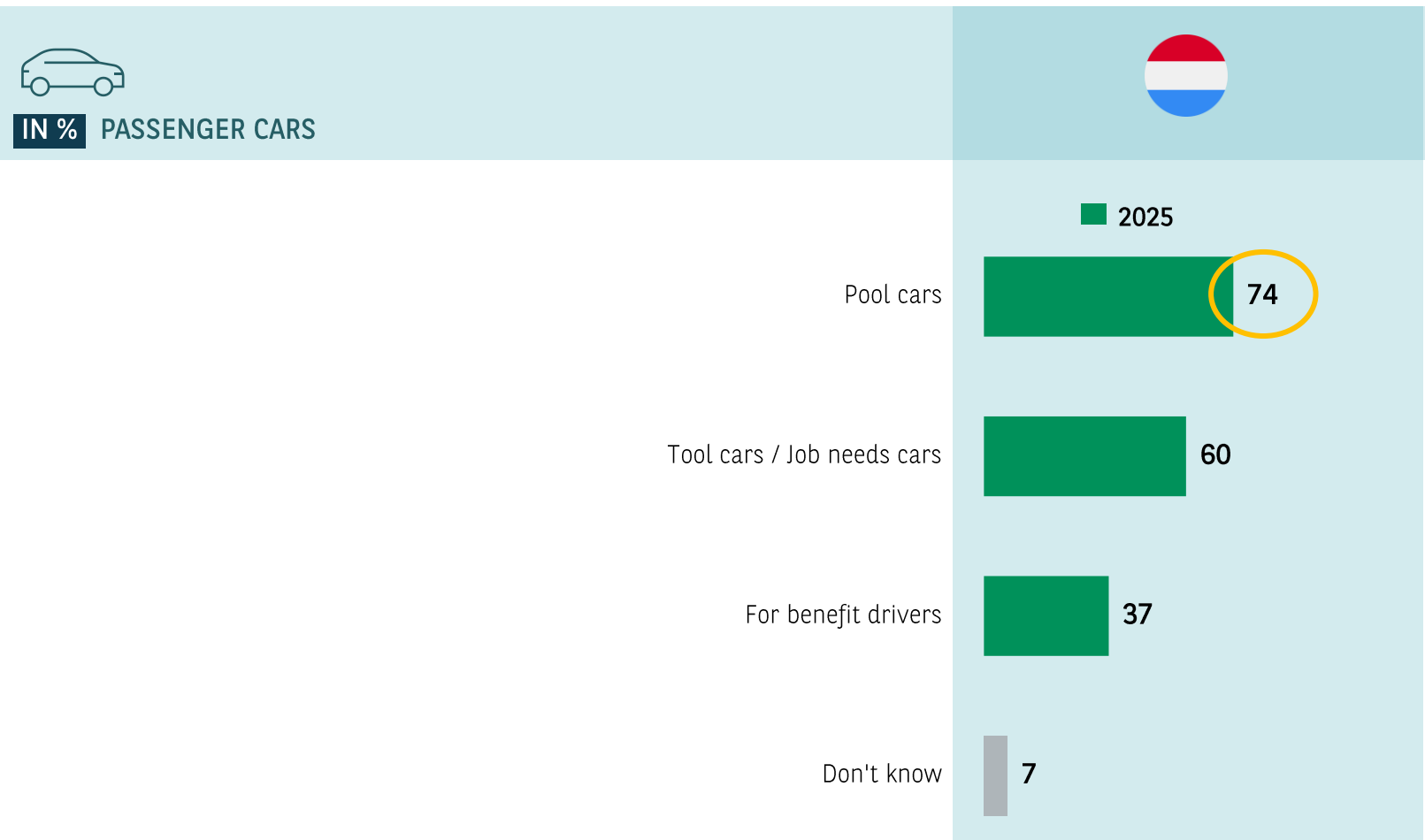


A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 74% of the companies that are already including used passenger cars are using them as Pool cars.



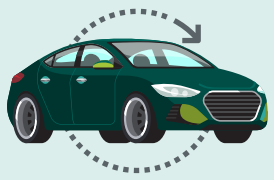
A15. Considering the passenger cars that were, or will be, not new when acquired: for which type(s) of use?
Basis: Basis: companies with used passenger cars

02

FINANCING METHODS

How do companies finance their fleets?





The growth potential of operational leasing remains significant in Luxembourg

41%

TREND

NEXT
3 YEARS

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

33%

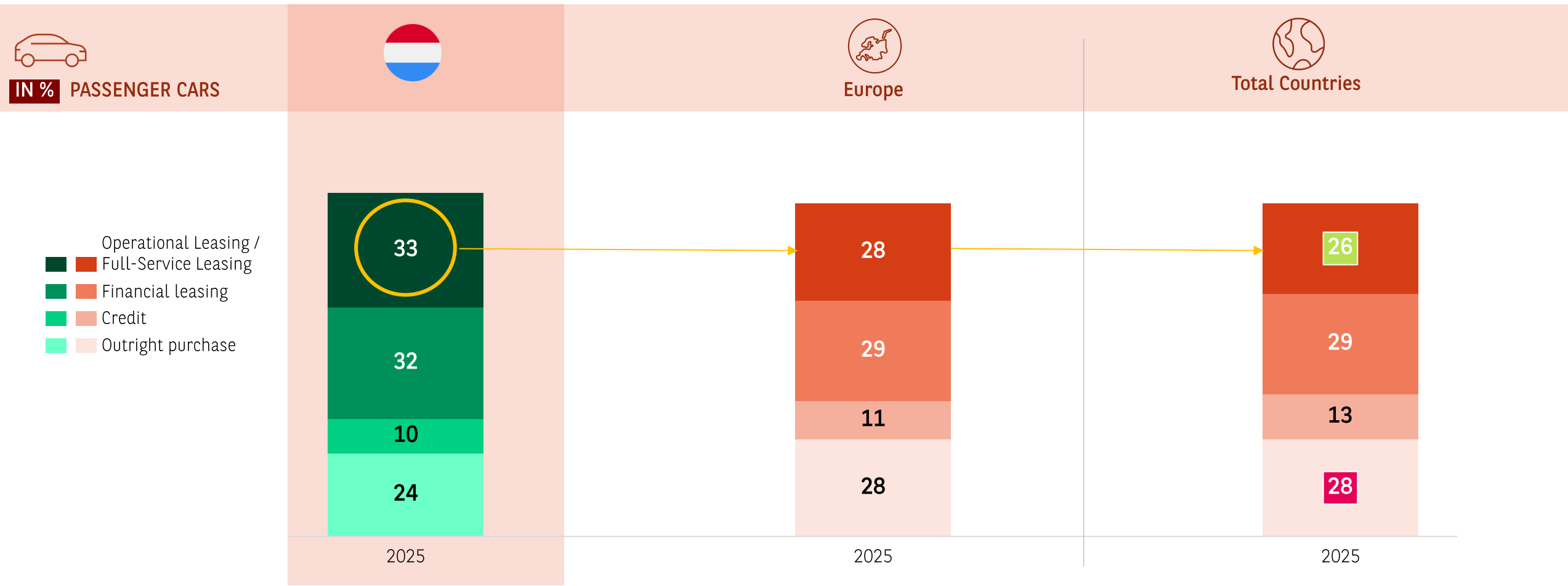
ADDITIONAL INFORMATION

report operational leasing is their current primary financing method for passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 33% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



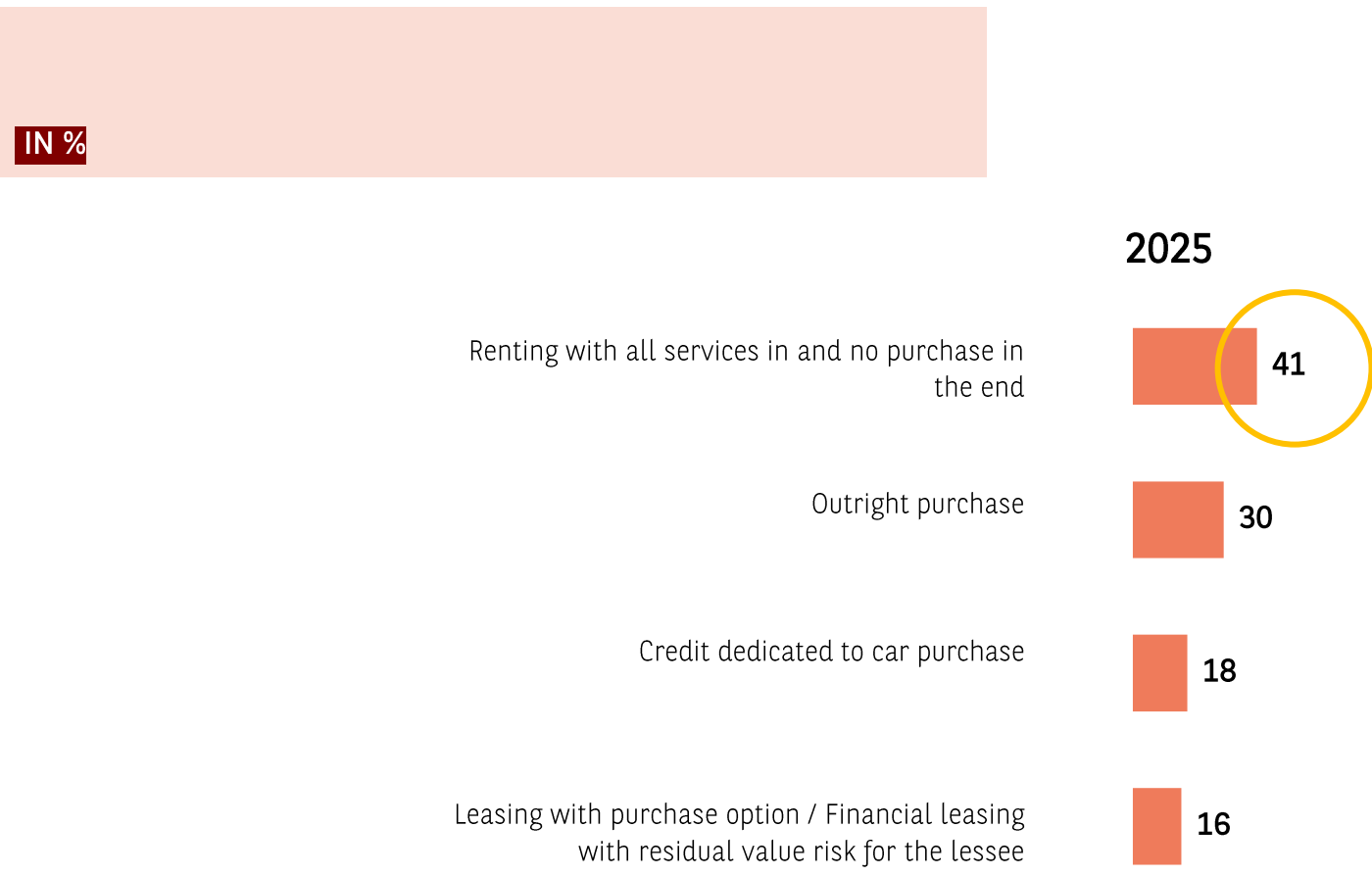
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

NEXT FINANCING METHOD

HOW TO READ THE RESULTS ?

In 2025, 41% of the companies are going to use Renting with all services in and no purchase in the end for the next fleet renewal.



PT30. From the different financing methods, which one are you going to use for the next fleet renewal?
Basis: companies with corporate vehicles = 100%

New item → No comparison vs previous waves

03

ENERGY MIX

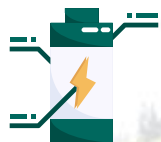
**What energy technologies are used?
What changes are to be expected in the
near future?**





Fleet electrification remains in line with the European market

52%



have already implemented **electrified technologies** for their passenger car fleets

69%

ADDITIONAL INFORMATION

consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars, while **84%** have or plan to implement a charging strategy

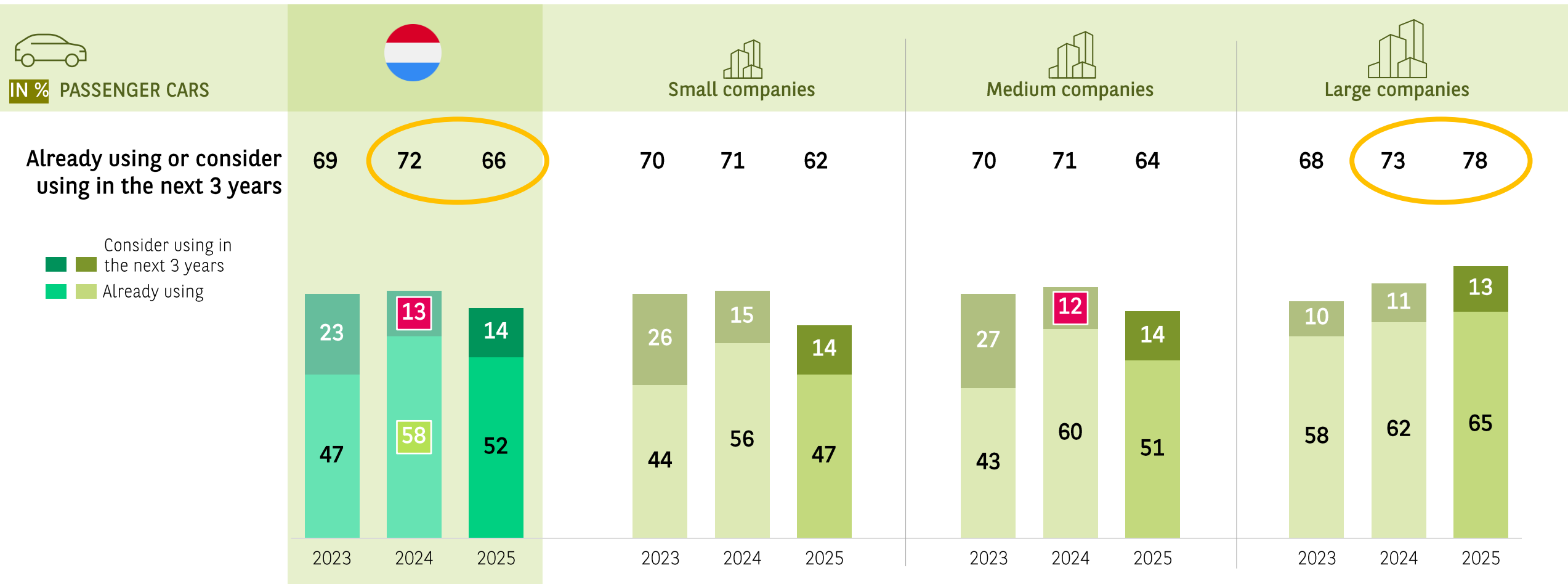


ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 66% 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

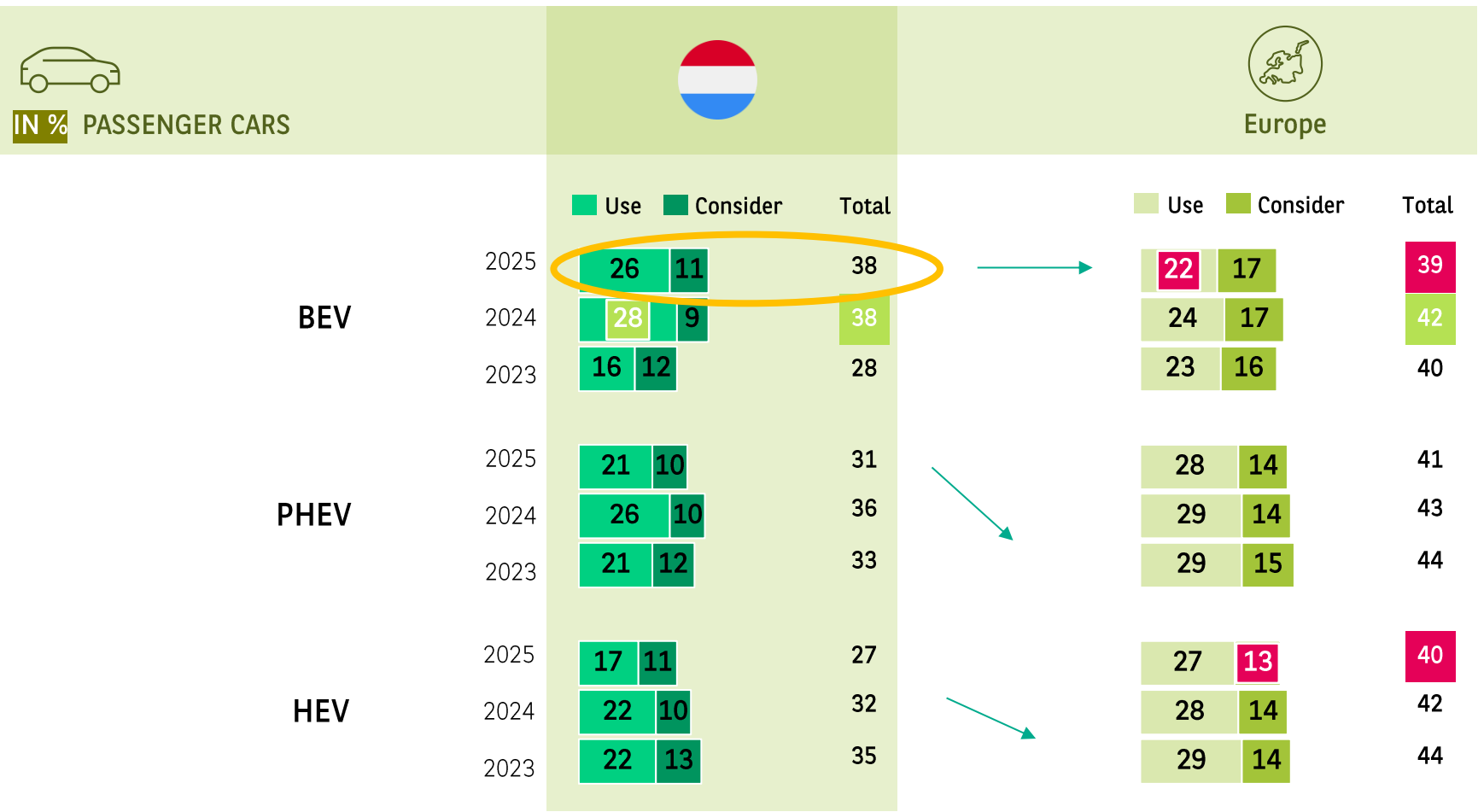
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 38% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



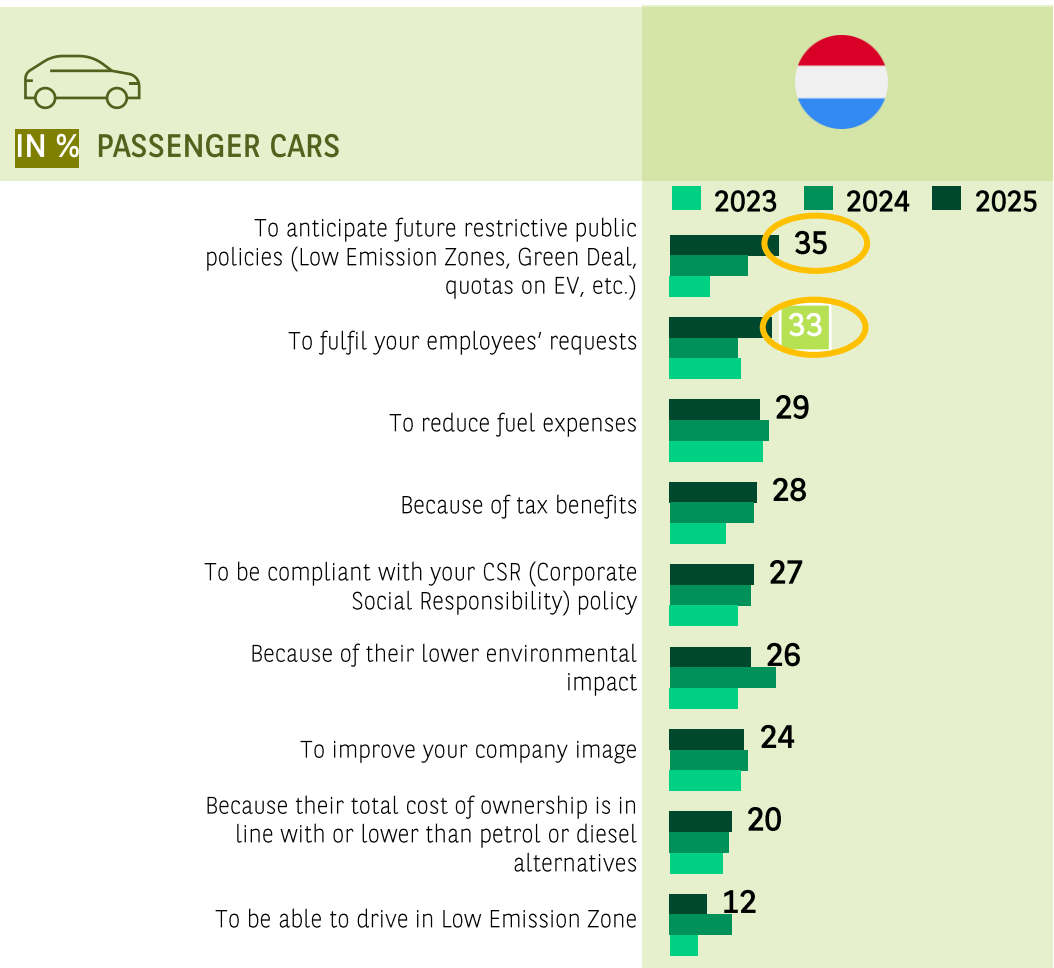
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 35% of the companies with passenger cars are already using alternative energy technologies or are considering it To anticipate future restrictive public policies (Low Emission Zones, Green Deal, quotas on EV, etc.).



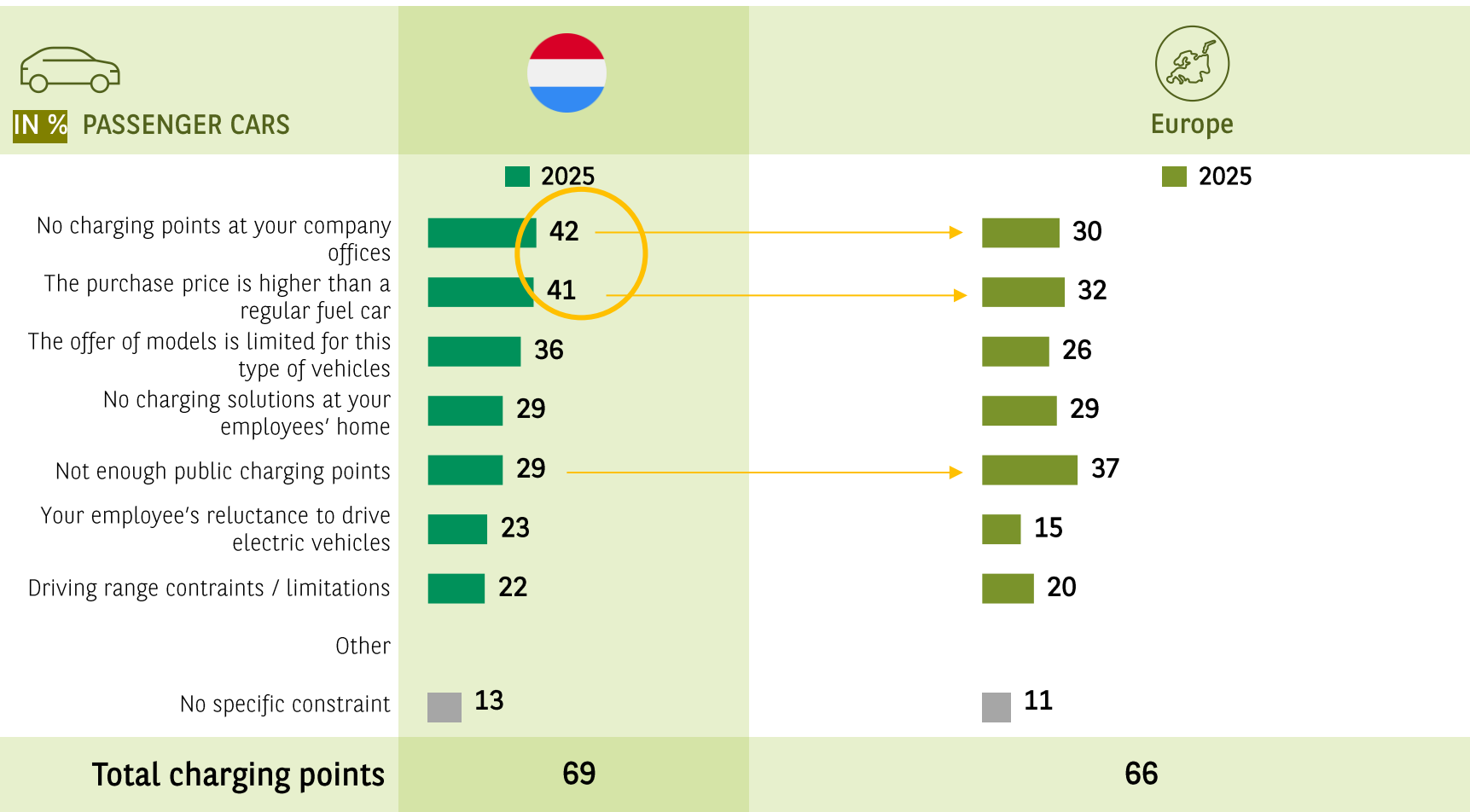
E28A. Why have you already implemented or why do you consider implementing these energy technologies?
Basis: companies that are already using or considering using alternative energy technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 42% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: No charging points at your company offices. And 69% of the companies mention at least one reason related to charging points.

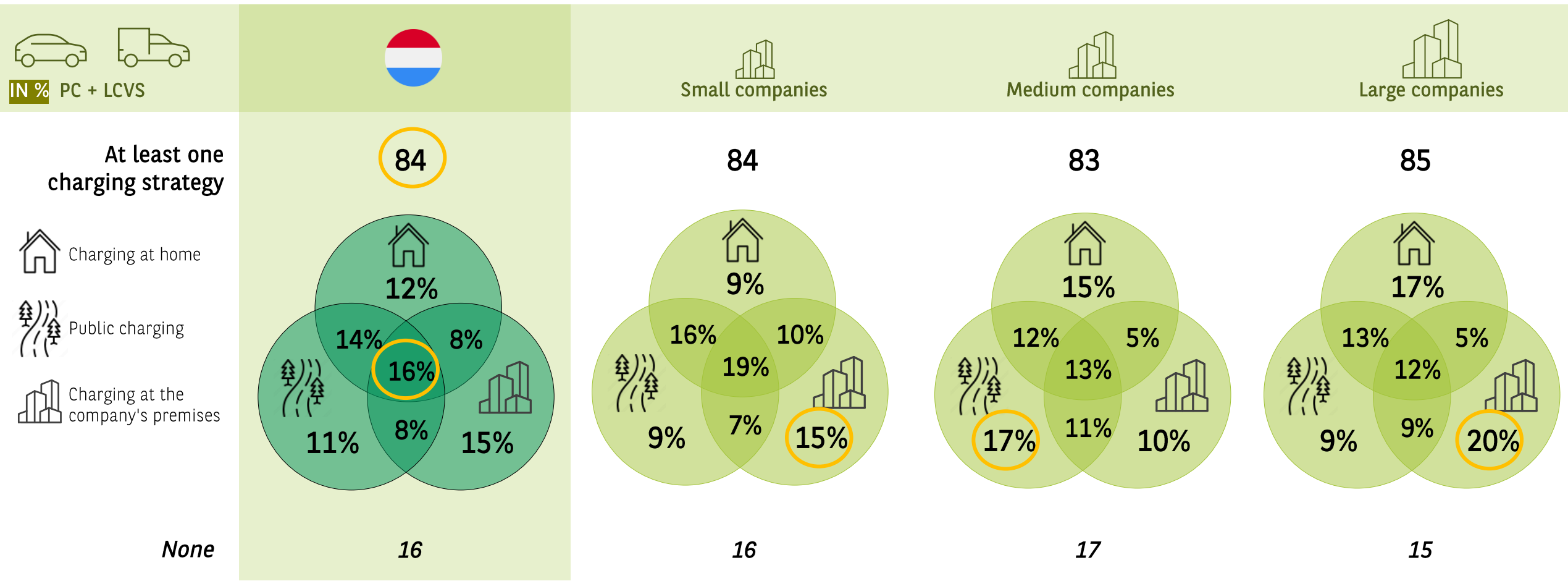


E28B_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with passenger cars and aware of EV technology

CHARGING STRATEGIES

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 84% of the companies have at least one charging strategy or will have in the future.

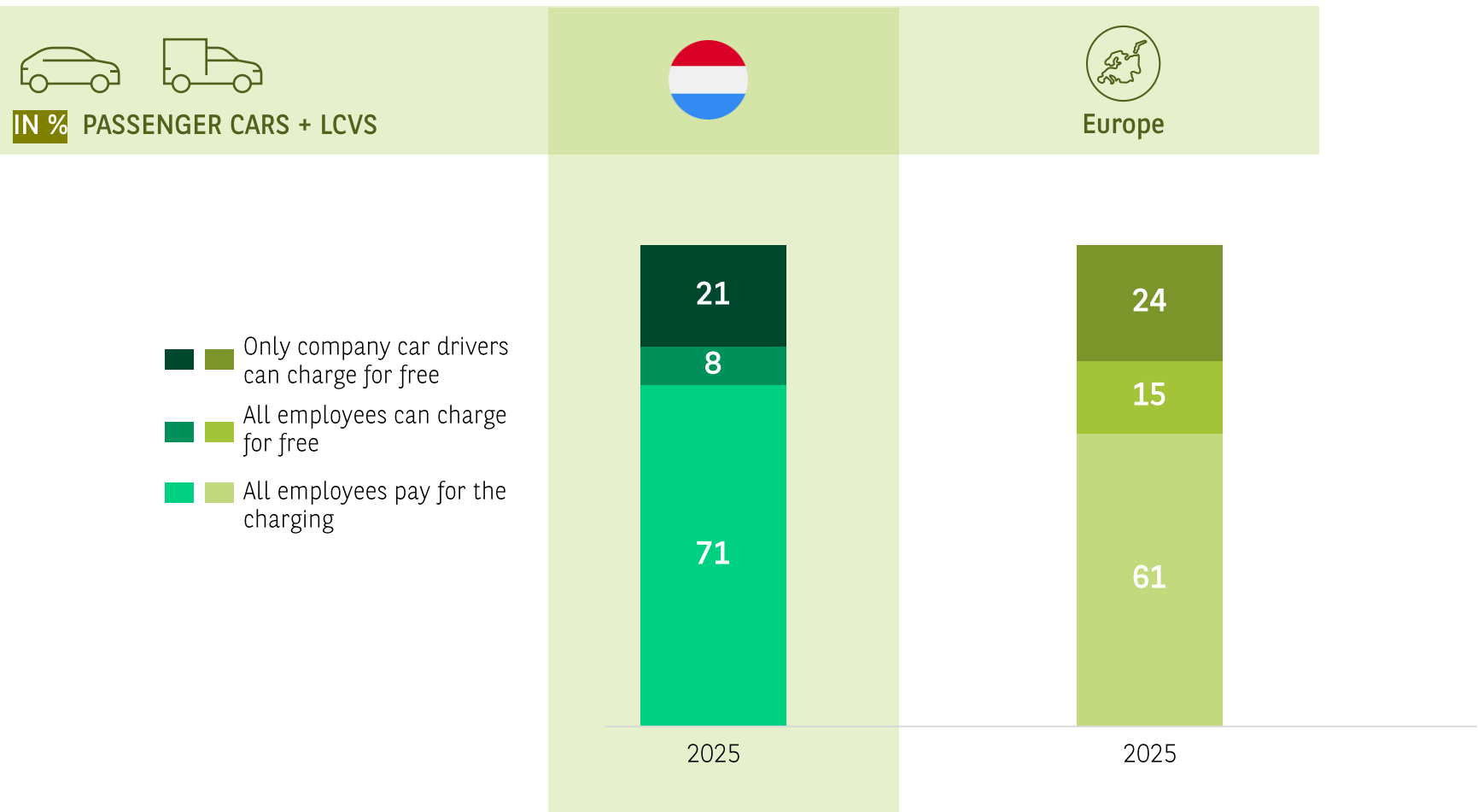


E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

COST MANAGEMENT OF CHARGING AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 21% 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

04

CONNECTED FLEETS

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





A confirmed connectivity say-do gap: a high level of equipment but still a limited use of telematics data

31%

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

71%

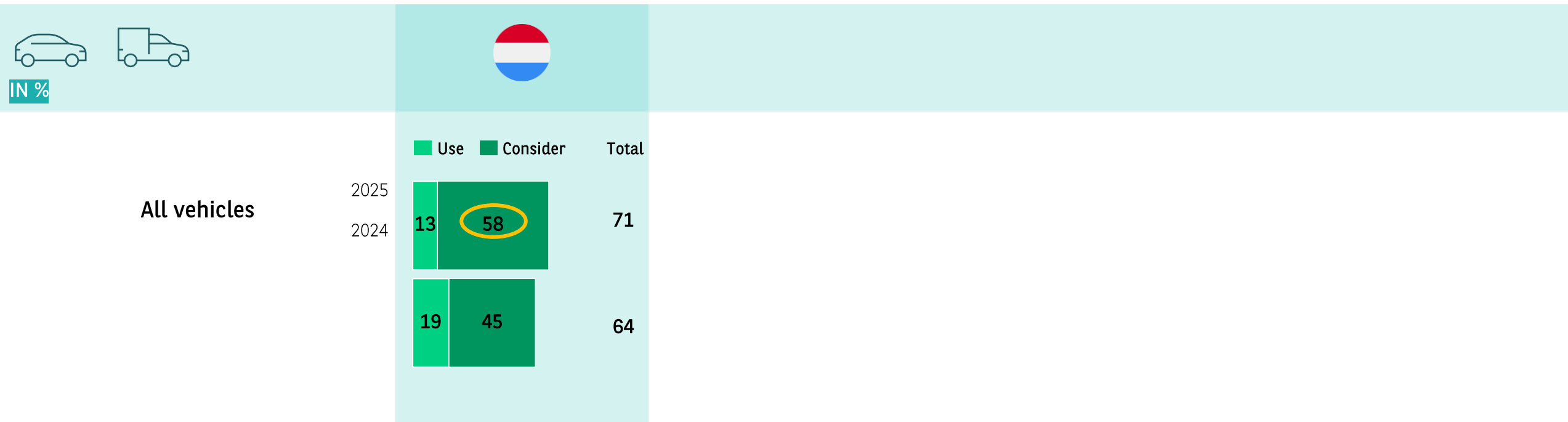
ADDITIONAL INFORMATION

equipped use or consider
using telematics data,
with only **13%** already using
it to date

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 72% 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.



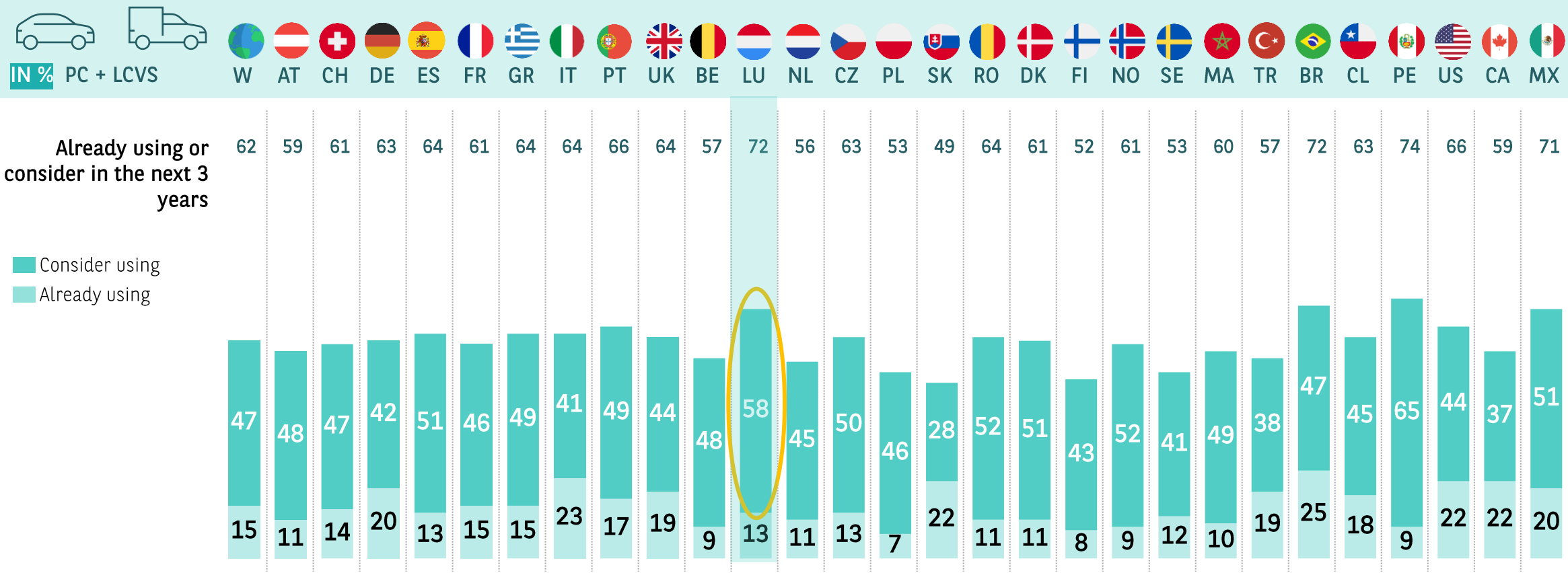
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 72% 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?





Employees mobility

Mobility policy

- Public transport expense reimbursement
- Personal vehicle expense reimbursement
- Mobility Budget
- Private lease or salary sacrifice
- A short or mid-term rental vehicle
- Car or cash allowance

Mobility solution

- Car sharing
- Ride sharing
- Bike Leasing
- Bike Sharing
- Scooter and moto leasing
- An app provided by the company to book multiple mobility solutions
- A card provided by the company to pay multiple mobility solution



A fairly steady commitment to employee mobility, with bright prospects fueled by CSR considerations

81%

of companies have implemented at least one **mobility policy** and **55% mobility solution** or are considering doing so

up to 52%

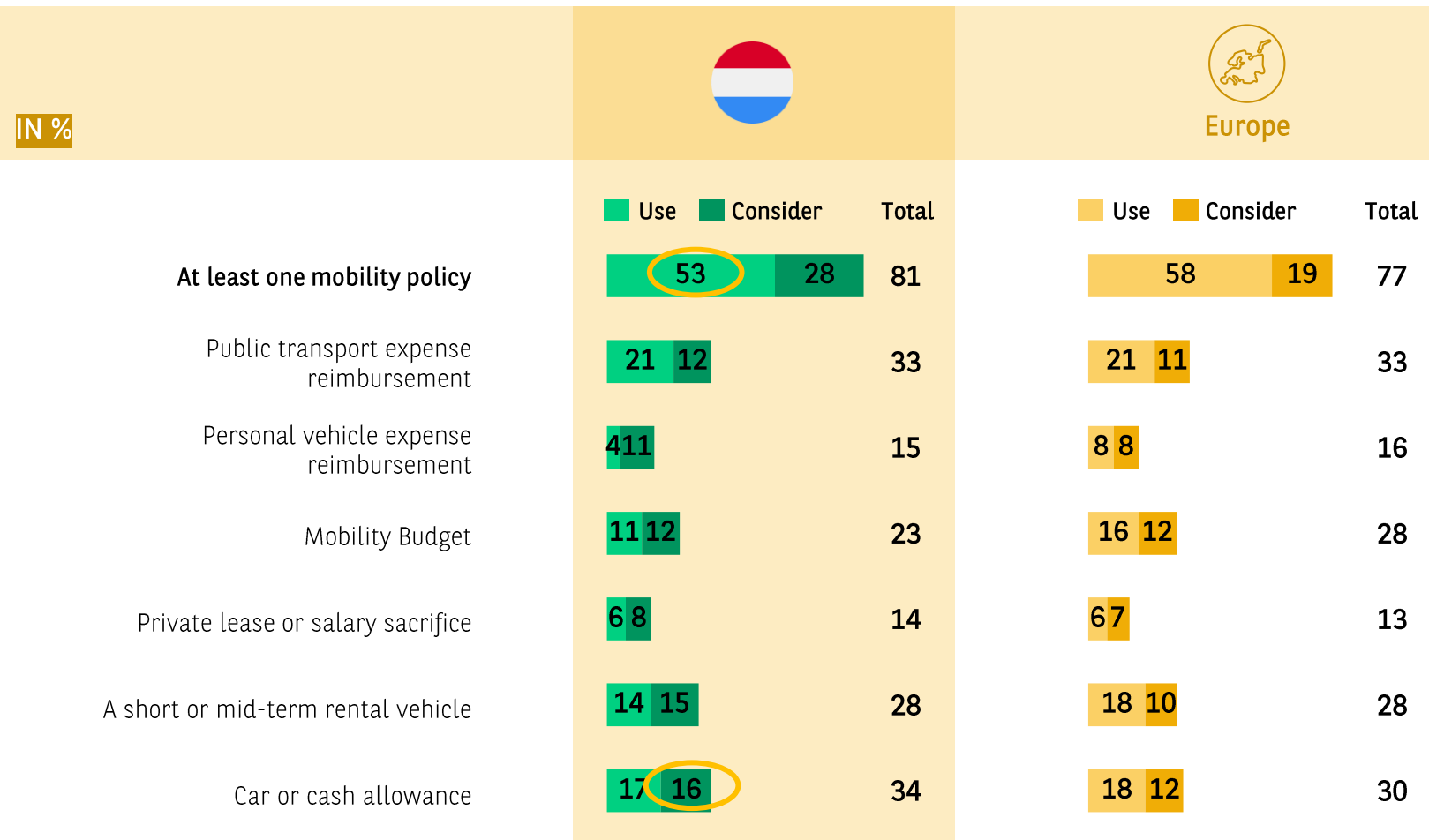
ADDITIONAL INFORMATION

quote CSR policies among their key motivations to implement mobility solutions and policies, followed by HR-related needs (42% to 46%)

MOBILITY POLICIES IMPLEMENTATION

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 33% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

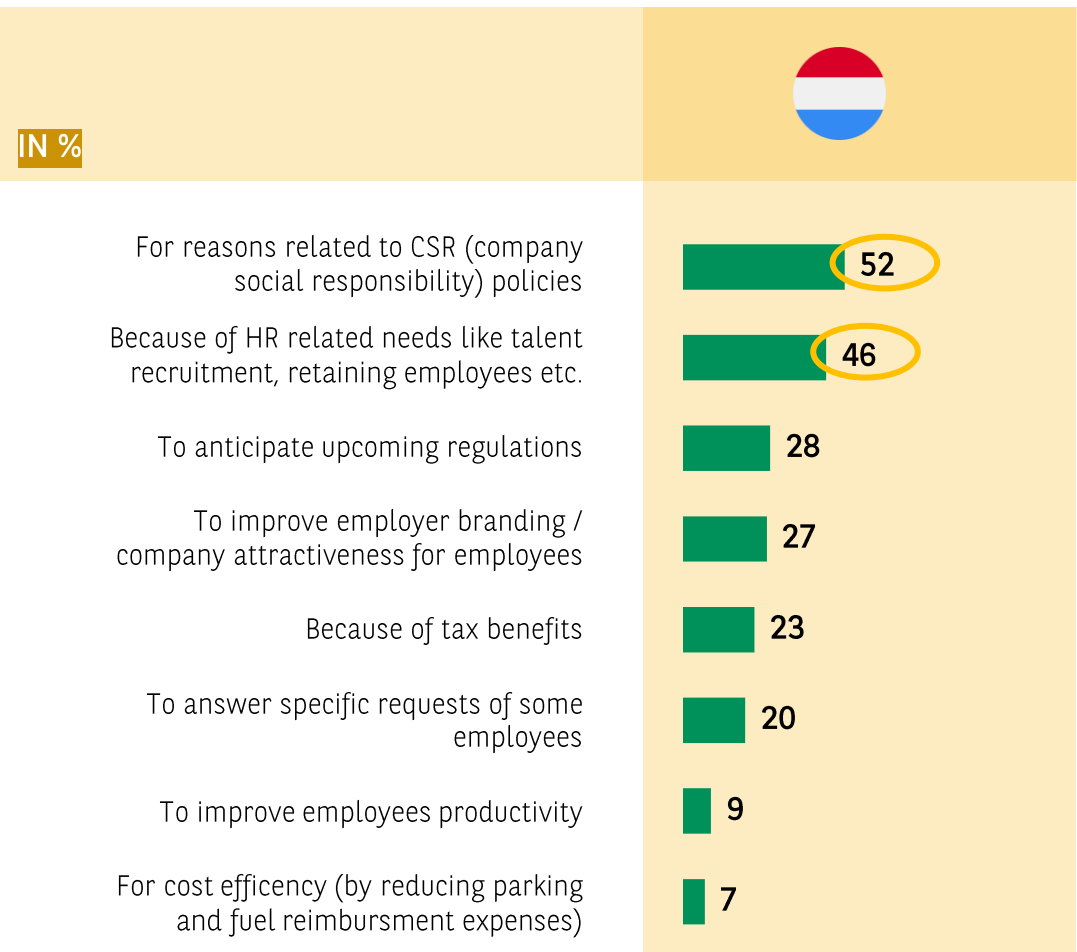


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

REASONS FOR IMPLEMENTING MOBILITY POLICIES

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 52% of the companies declare that the main reason for introducing mobility policies is: For reasons related to CSR (company 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 Luxembourg in 2025, 17% of the companies are already using Car sharing or are considering doing so in the next 3 years.

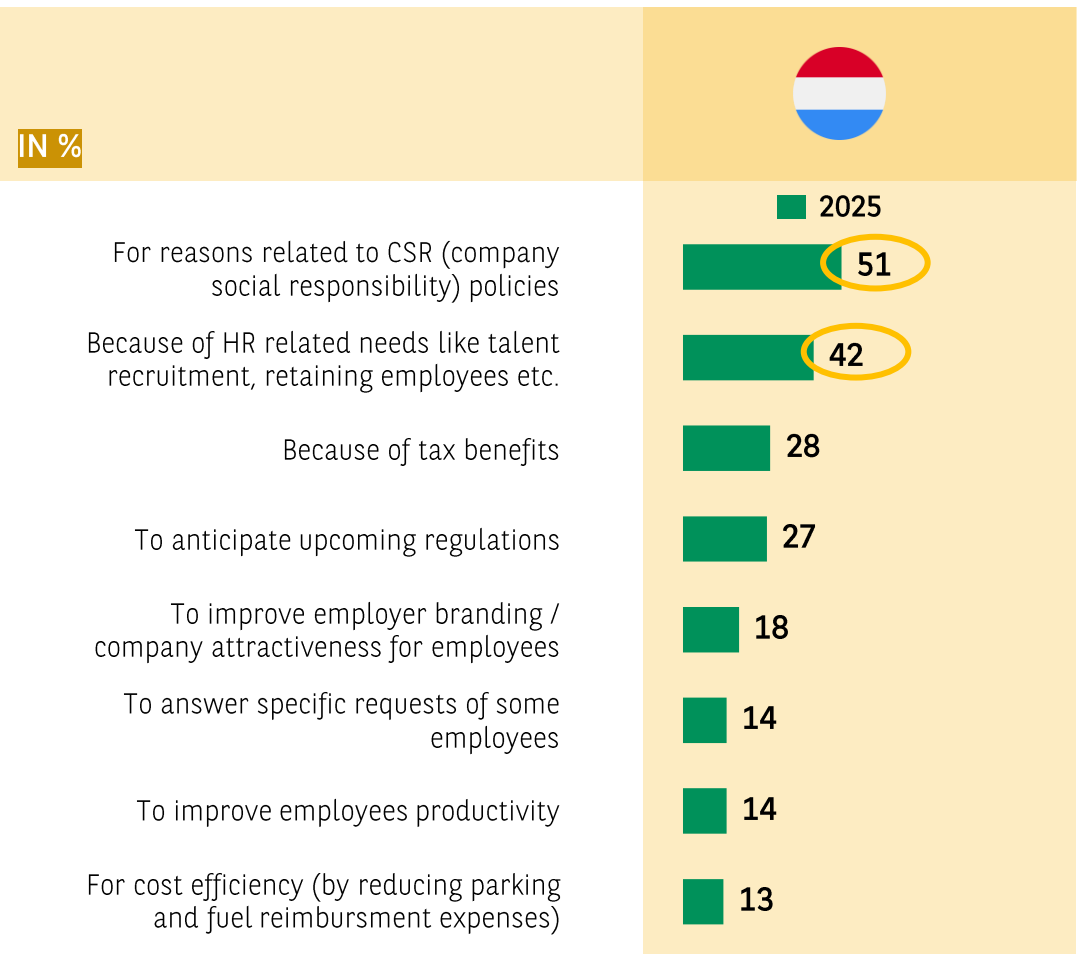
IN %				 Europe		
	Use	Consider	Total	Use	Consider	Total
At least one mobility solution	31	24	55	33	25	58
Car sharing	9	8	17	13	10	23
Ride sharing	3	15	17	7	9	16
Bike Leasing	1	5	7	4	7	11
Bike Sharing	3	7	11	5	9	14
Scooter and moto leasing	9		9	4	6	11
An app provided by the company to book multiple mobility solutions	13	7	20	11	10	21
A card provided by the company to pay multiple mobility solution	4	17	21	8	12	20

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%

REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 51% of the companies declare that the main reason for introducing mobility solutions is: For reasons related to CSR (company 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

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?



Clear awareness of need to decarbonize, in line with top challenges

13%

TREND

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

33%

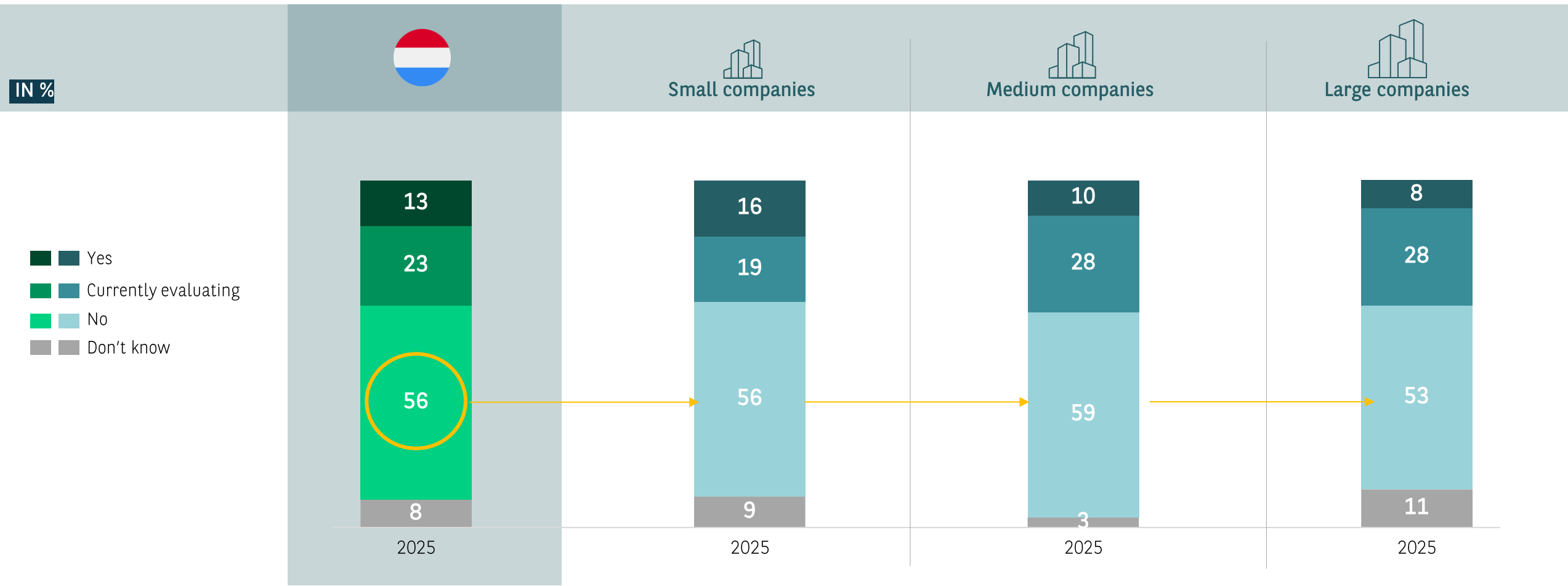
ADDITIONAL INFORMATION

quote the promotion of responsible driving among their main challenge for the next 3 years, closely followed by the adaptation to restrictive public policies on ICE (32%)

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

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

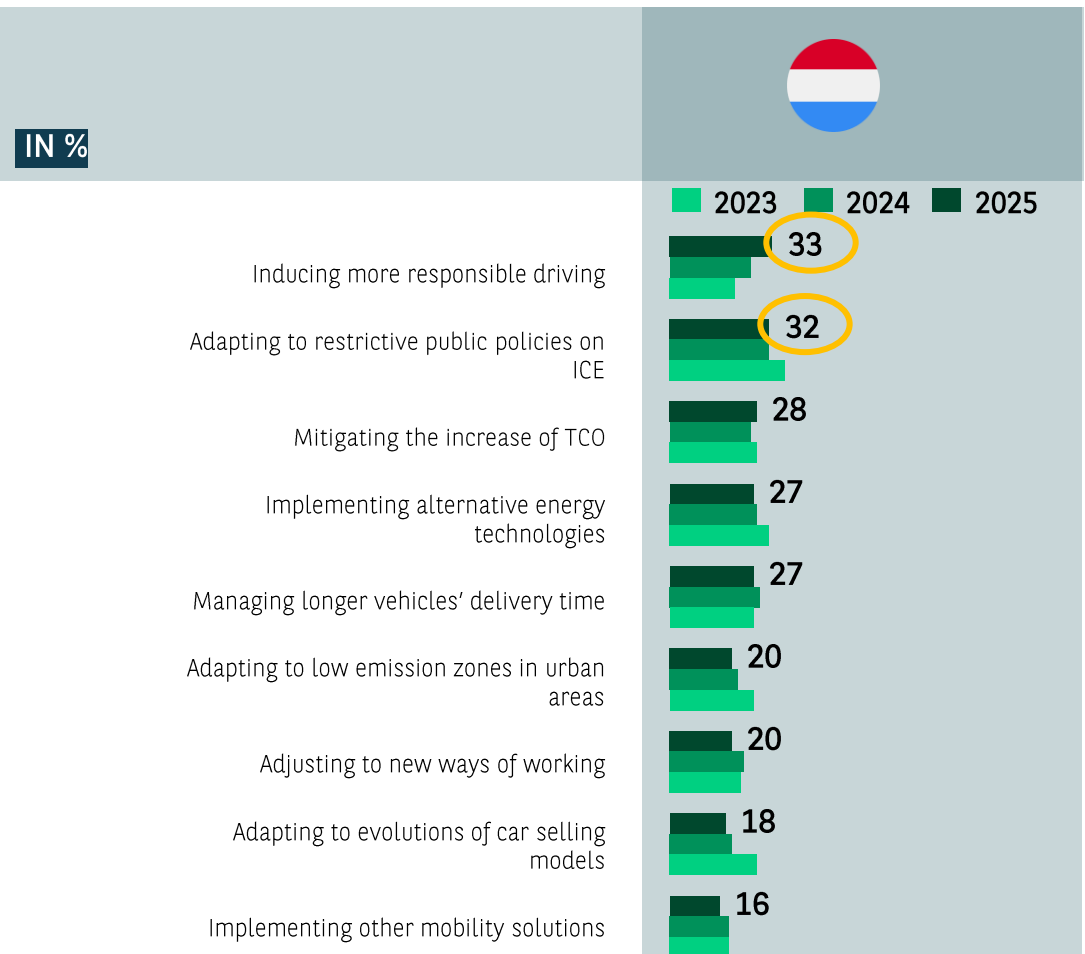


A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Luxembourg in 2025, 33% of the companies declare that Inducing more responsible driving 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

THANK YOU

