

ARVAL MOBILITY OBSERVATORY 2025

MOBILITY IN LUXEMBOURG CHANGES AND TRENDS



EDITO



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In an evolving context, our role is to support mobility changes and help everyone travel better.

To achieve this objective, we need to have a clear view of current and future trends. That is why, every year, the Arval Mobility Observatory carries out the Fleet and Mobility Barometer, an independent survey conducted by the Ipsos Institute which asks thousands of European fleet managers – including 250 from Luxembourg companies of all sizes – about their changing needs.

In order to support you in implementing your mobility policy, we invite you to take a look at the main results of the 2025 Fleet and Mobility Barometer, set out on the pages that follow, which provide an insight into the current situation and future prospects for corporate mobility.

Happy reading!

METHODOLOGY



250
Interviews
with corporate fleet
decision makers



Company
size & sector



Employees

01-99

100 to 249

250/ +



132

68

50

?

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?

LUXEMBOURG



KEY GLOBAL INSIGHTS

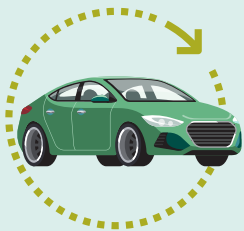


Despite persistent global uncertainties, most Luxembourg companies remain confident about the future of their fleets

92% anticipate that their fleet will either remain stable or grow (with 22% expecting growth)

NEXT 3 YEARS

41 % include second-hand vehicles, mainly used as pool cars or tool cars among passenger cars fleets



The growth potential of operational leasing remains significant in Luxembourg

41% are going to use full-service leasing for the next fleet renewal, ahead of Outright purchase (30%)

33% report operational leasing is their current primary financing method for passenger cars (28% for Europe)



Luxembourg companies consolidate their adoption of energy technologies in their passenger cars fleets

52% have already implemented electrified technologies for their passenger car fleets

69% 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)



A good commitment to employee mobility, fueled by CSR considerations and HR related needs

81% interviewed have already implemented at least one mobility policy and **55%** are considering doing so

up to **52%** quote CSR policies among their key motivations to implement mobility solutions and policies, followed by HR-related needs (42% to 46%)



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

31% having adopted a telematics tool for their passenger cars, LCVs or both

72% equipped use or consider using telematics data, with 13% already using it today

NEXT 3 YEARS



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

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

33% 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%)

NEXT 3 YEARS



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



TREND

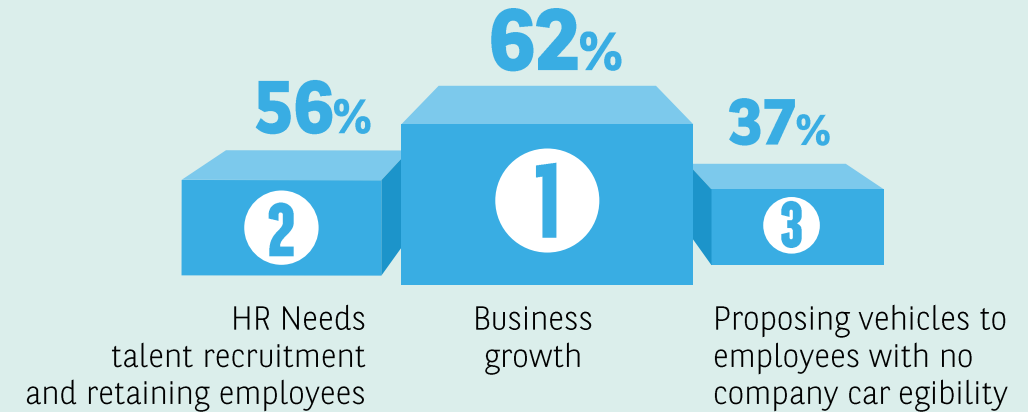
NEXT
3 YEARS

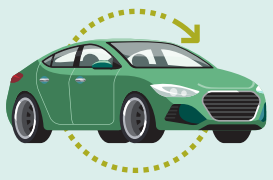
anticipate that their fleet will either **remain stable** or **grow** (with 22% expecting growth)

41% **include second-hand vehicles**, mainly used as pool cars or tool cars among passenger cars fleets

REASONS

for future fleet increase





The growth potential of operational leasing remains significant in Luxembourg

41%

are going to use **full-service leasing** for the next fleet renewal, ahead of Outright purchase (30%).

ADDITIONAL INFORMATION

33%

report operational leasing is their current **primary financing method** for passenger cars (vs 28% for Europe)



Luxembourg companies consolidate their adoption of energy technologies in their passenger cars fleets

52%

TREND

have already implemented at least one of **the alternative fuel technologies*** for their passenger car fleets

69%

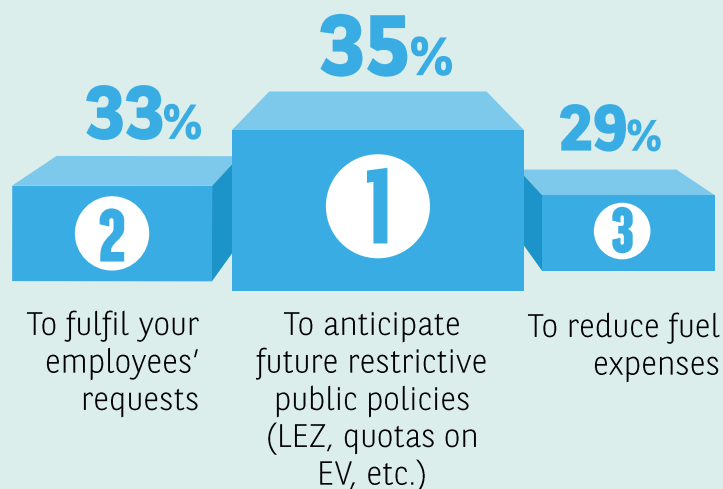
ADDITIONAL INFORMATION

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)

REASONS

for electrification — Passenger cars



**The Alternative Fuel Technologies considered in the Barometer are*

(1) For Passenger Cars - hybrid vehicles (HEVs), plug-in hybrids (PHEVs) and battery electric vehicles (BEVs) and

(2) For LCVs - battery electric vehicles (BEVs) and Hydrogen Fuel Cell



The shift for electrified LCVs fleets remains more complicated

23%

TREND

NEXT
3 YEARS

have already implemented at least one of **the alternative fuel technologies*** or are considering to do so for their LCV fleet

13%

ACTUAL

Already using

REASONS

for electrification — light commercial vehicles

31%



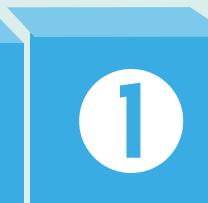
Because their total cost of ownership is in line with or lower than petrol or diesel alternatives

31%



To reduce fuel expenses

31%



To be compliant with your CSR policy



Battery electric vehicles (BEVs) remains the main alternative for Luxembourg passenger cars fleets' transition

38%

NEXT
3 YEARS

TREND

of companies have already or are considering to **implement BEV passenger cars** (limited to 20% for LCVs)

20%

ADDITIONAL INFORMATION

LCVs

11% already using



Alternative technologies Evolution

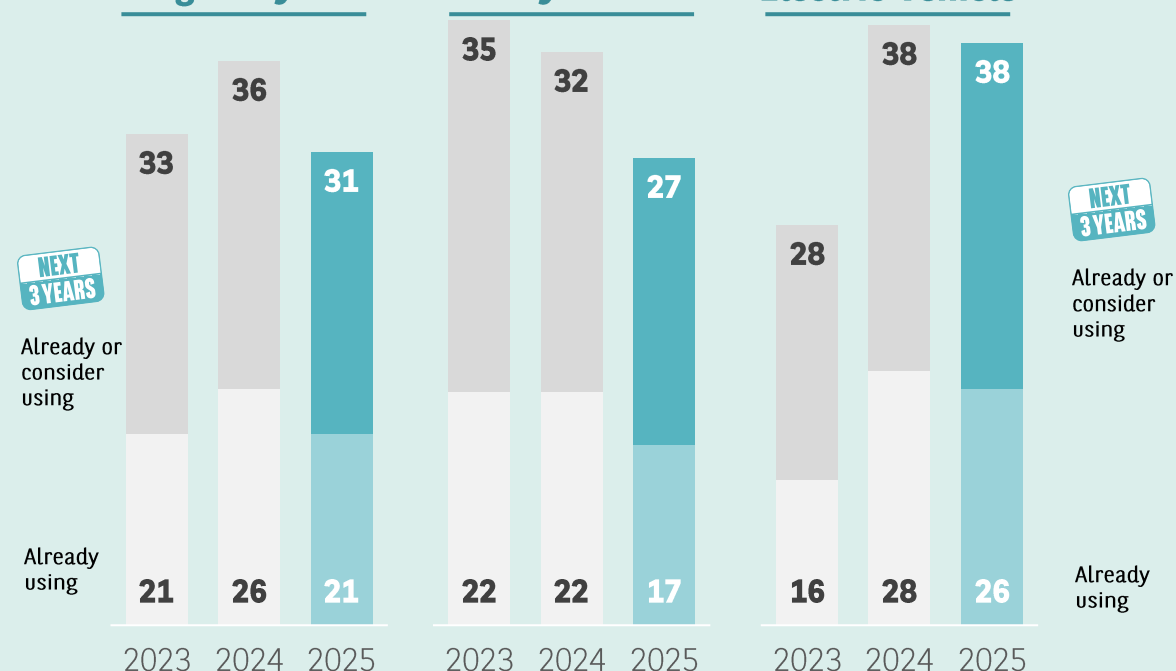


Passenger cars

Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



*The Alternative Fuel Technologies considered in the Barometer are

(1) For Passenger Cars - hybrid vehicles (HEVs), plug-in hybrids (PHEVs) and battery electric vehicles (BEVs) and

(2) For LCVs - battery electric vehicles (BEVs) and Hydrogen Fuel Cell



A good commitment to employee mobility, fueled by CSR considerations and HR related needs



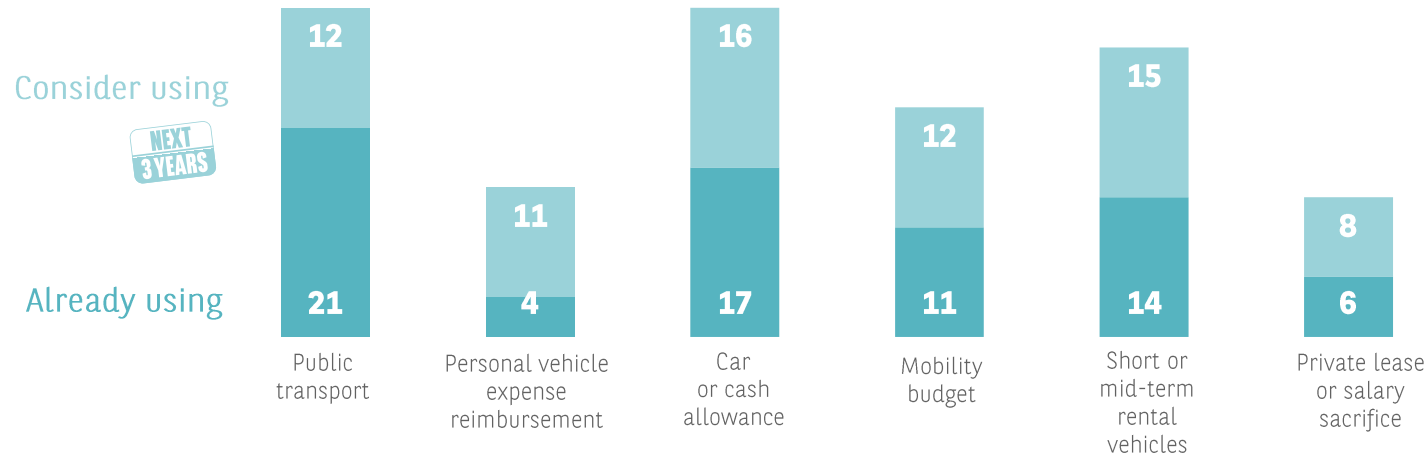
ACTUAL

have already implemented at least **one alternative mobility policy** or are considering to do so

TREND



Already using

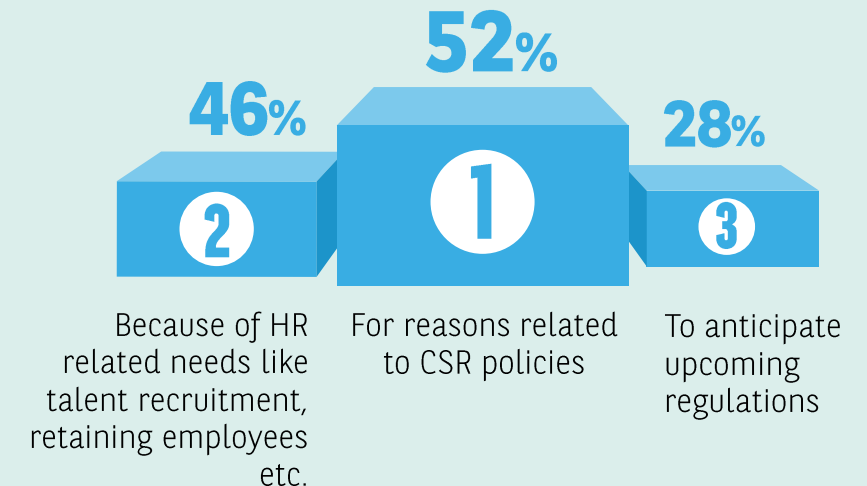


Mobility policy

- 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

REASONS

for implementing mobility policy





A good commitment to employee mobility, fueled by CSR considerations and HR related needs



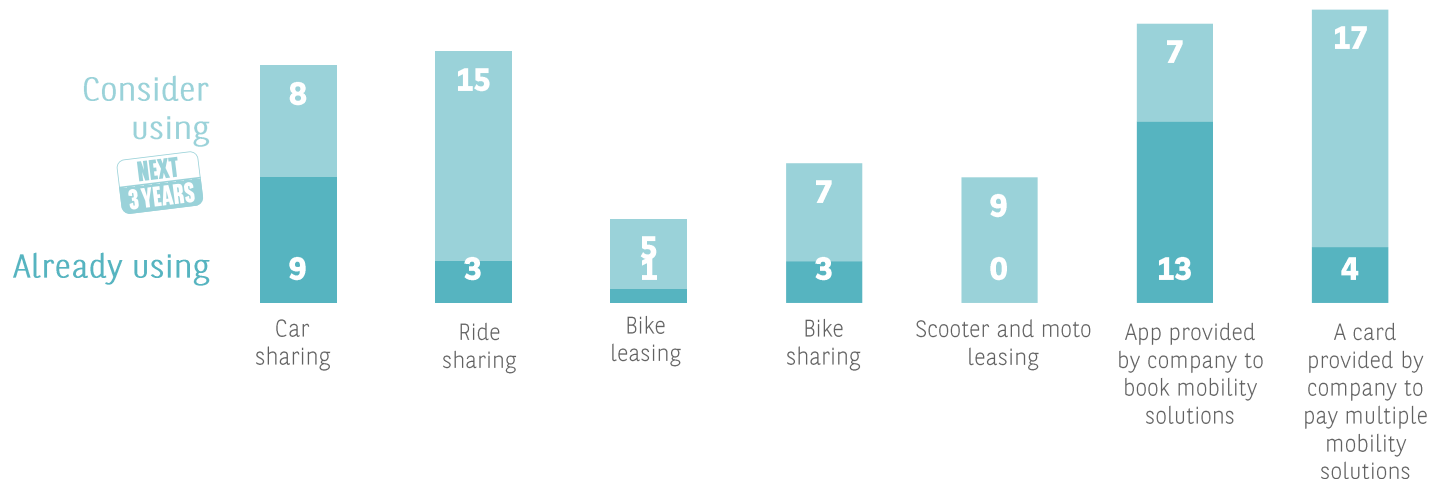
ACTUAL

have already implemented at least **one alternative mobility solution** or are considering to do so

TREND



Already using

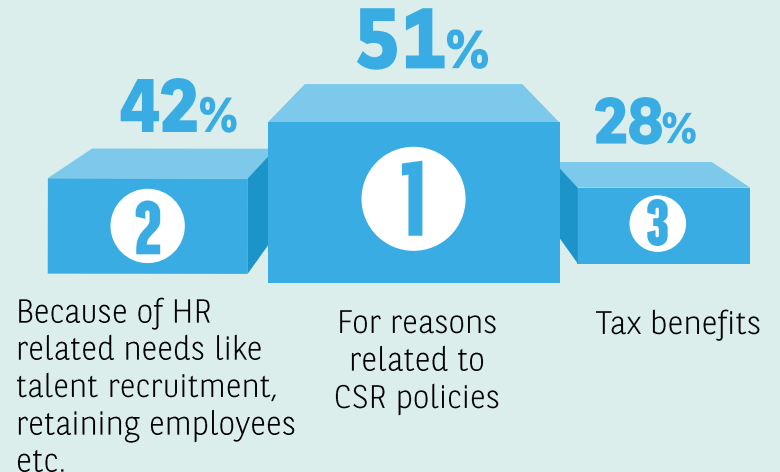


Mobility solution

- 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

REASONS

for implementing mobility policy





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



ACTUAL

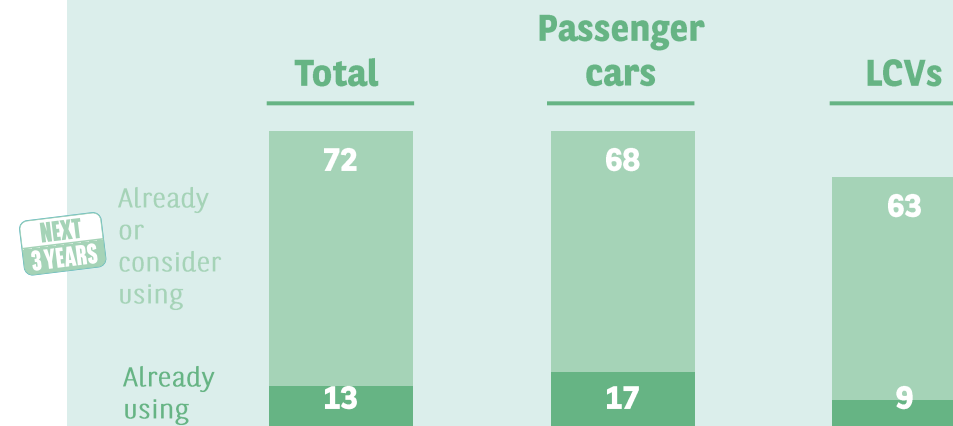
having adopted a **telematics tool** for their passenger cars, LCVs or both



NEXT
3 YEARS

equipped use or consider using **telematics data, with 13% already using it today**

USE of TELEMATICS DATA





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

13%

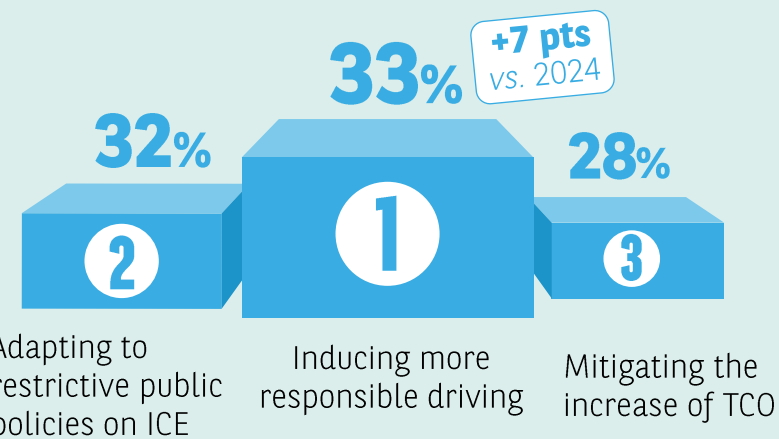
ACTUAL

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



3 MAIN CHALLENGES

for fleet management in the next 3 years




4th : 27% implementing alternative energy technologies
5th : 27% managing longer vehicles' delivery times
6th : 20% adjusting to new ways of working


CONTACT



**The way we travel is changing.
Arval is a trusted partner to
support your transport policies,
helping you evolve alongside the
changing needs of your users.**

Let's talk!

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