

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

RESEARCH APPROACH

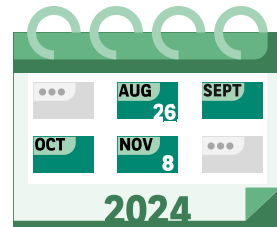


8,061

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?

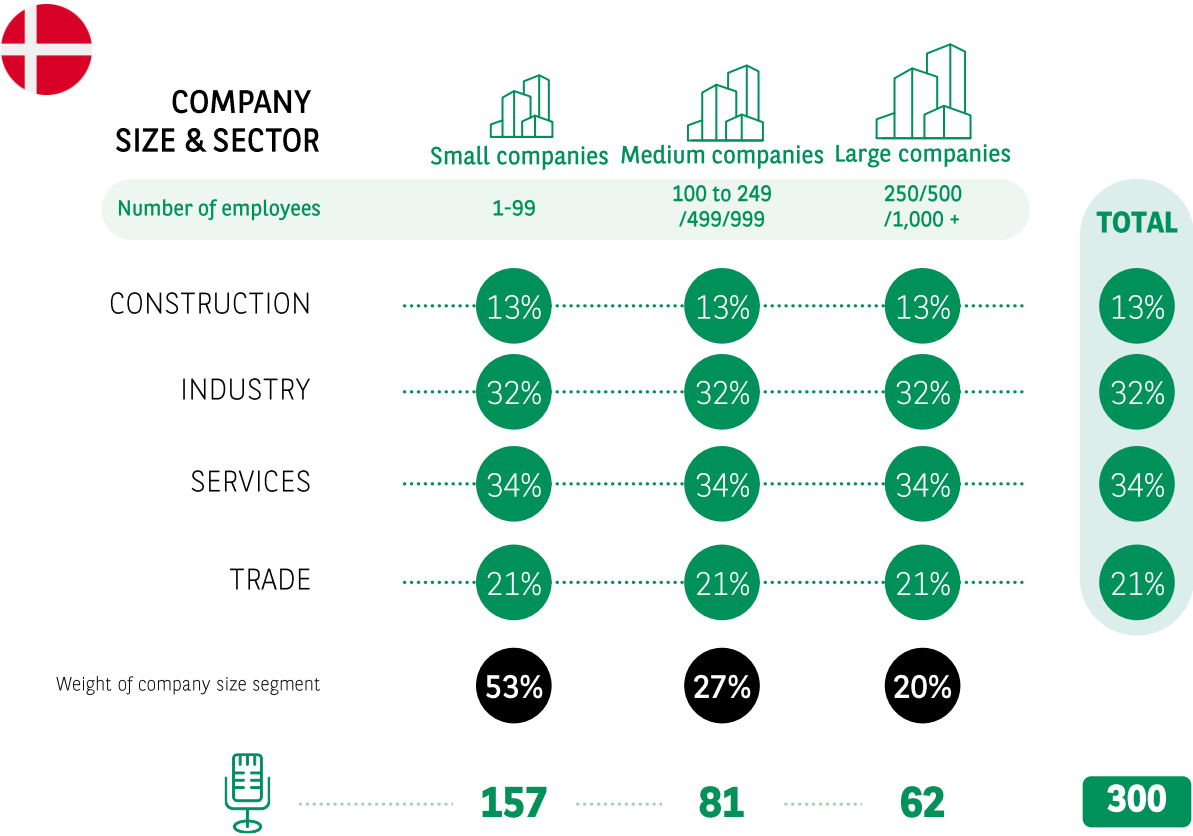
3



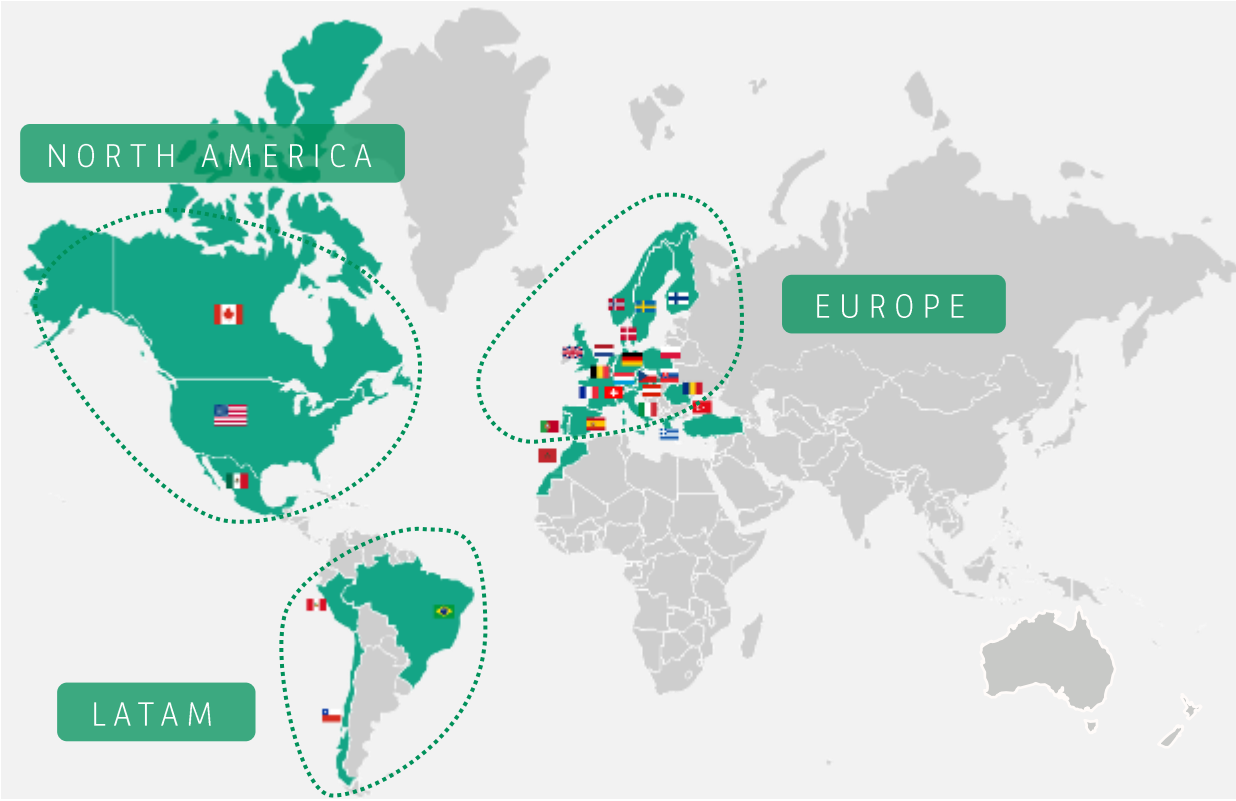
How do mobility solutions
impact corporate mobility?

SAMPLE STRUCTURE AND SCOPE

QUOTAS ON COMPANY SIZE & INDUSTRY



28 COUNTRIES - 3 REGIONAL BENCHMARKS



Morocco and Turkey : compared with Europe benchmark

KEY COUNTRY INSIGHTS



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

90% anticipate their fleet will either remain stable or grow in the next 3 years (with 17% expecting growth, driven by business development)

58% include second-hand vehicles, mainly used as pool cars or tool cars



THE POTENTIAL OF OPERATIONAL LEASING IN DENMARK REMAINS BEHIND THE EUROPEAN BENCHMARK

22% are considering either introducing operational leasing or further increasing it in the next 3 years (vs 36% in Europe)

22% report operational leasing is their current primary financing method



DANISH FLEETS' ELECTRIFICATION REMAINS IN LINE WITH THE EUROPEAN MARKET

55% have already implemented electrified technologies or are considering to do so for their passenger car fleets

62% consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars, while **89%** 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

43% have adopted telematics tools (for passenger cars, LCVs or both)

62% equipped use or consider using telematics data, with only 11% already using it to date



A SIGNIFICANT COMMITMENT TO EMPLOYEE MOBILITY, DRIVEN BY HR-RELATED NEEDS AND CSR

34% have already implemented or are considering Car or cash allowance, strengthening its position as one of the most attractive mobility options for Danish companies

43% to 46% quote HR-related needs among their motivations to implement mobility solutions and policies, followed by compliance to CSR policies (40% to 43%)



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

11% have set targeted decarbonization goals to date (with 27% currently evaluating such goals)

30% quote the promotion of responsible driving among their main challenges for the next 3 years, closely followed by fleet electrification (29%) and the adaptation to restrictive public policies on ICE vehicles (29%)



01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?

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

90% of companies anticipate that their fleets will either remain stable or grow over the next three years, recording a consistent level with the European average, but only **17%** expecting growth, compared to 24% among European companies.

This steady trend is consistent across different vehicle types (passenger cars and light commercial vehicles), while growth is supported by larger companies.

Fleet growth is primarily driven by business development

77% of Danish companies expecting fleet growth cite business development as the primary reason, consistently with the European trend (73%).

This is followed by HR-related needs appear less of a motivator (**55%**) and plans to offer vehicles to employees previously ineligible for company cars (**44%**, with a 12-point gap with the European benchmark).

Plans for shared vehicles (**20%**) ranks as less important motivation compared to Europe as a whole (30%).

A significant share of companies already have second-hand vehicles in their fleet

58% of Danish companies already include second-hand vehicles, representing a 19-point difference with the European benchmark. In addition, **34%** consider doing so in the next 3 years.

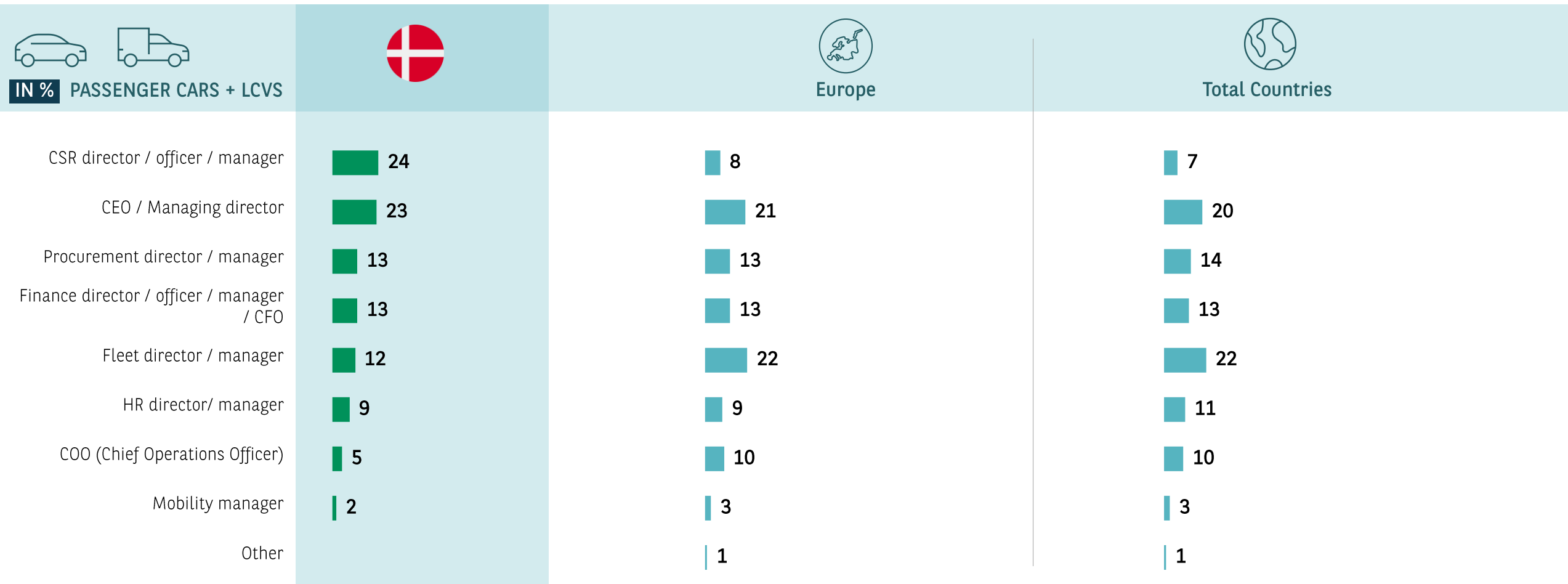
This trend is consistent across vehicle types and company sizes.

In Denmark, second-hand passenger cars are largely used as pool cars (82%) and tool cars (80%), both figures exceeding those for the European market as whole.

RESPONDENT POSITION

HOW TO READ THE RESULTS ?

In Denmark, 24% of the respondents are CSR director / officer / manager.

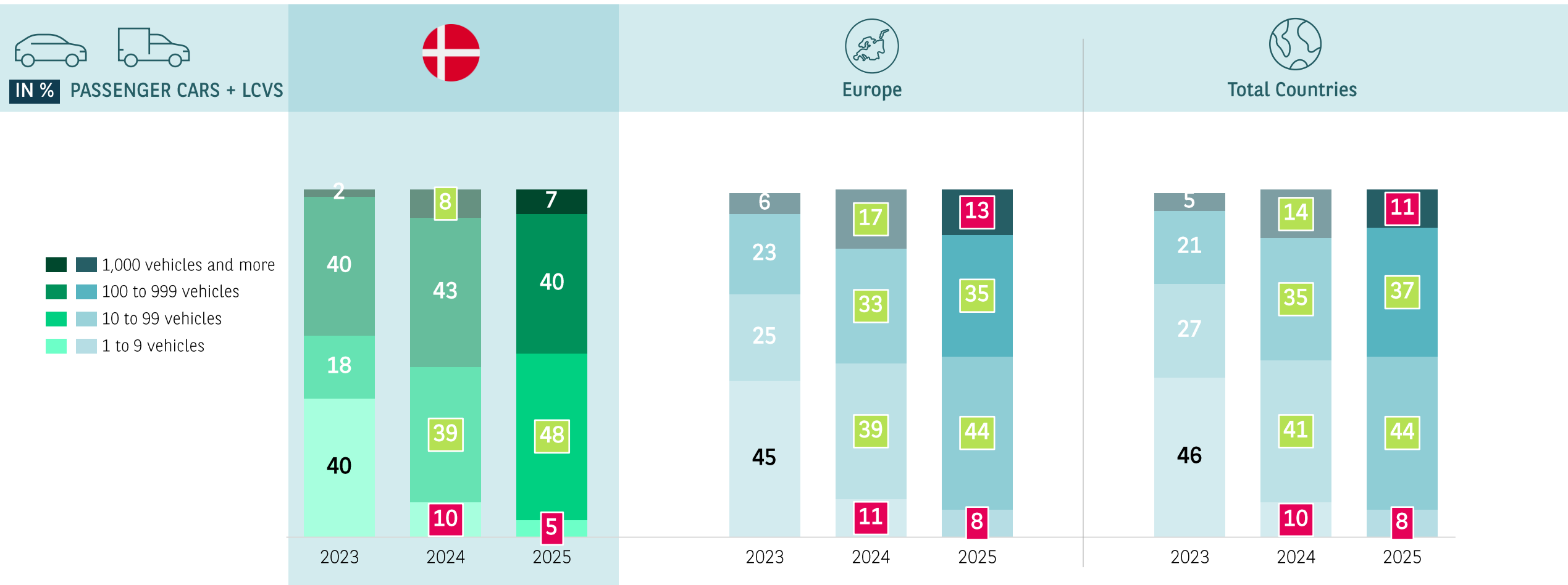


SC5TER. Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Denmark in 2025, vehicle fleets are composed of: 5% with 1-9 vehicles, 48% with 10-99 vehicles, 40% with 100-999 vehicles and 7% with 1,000 or more.



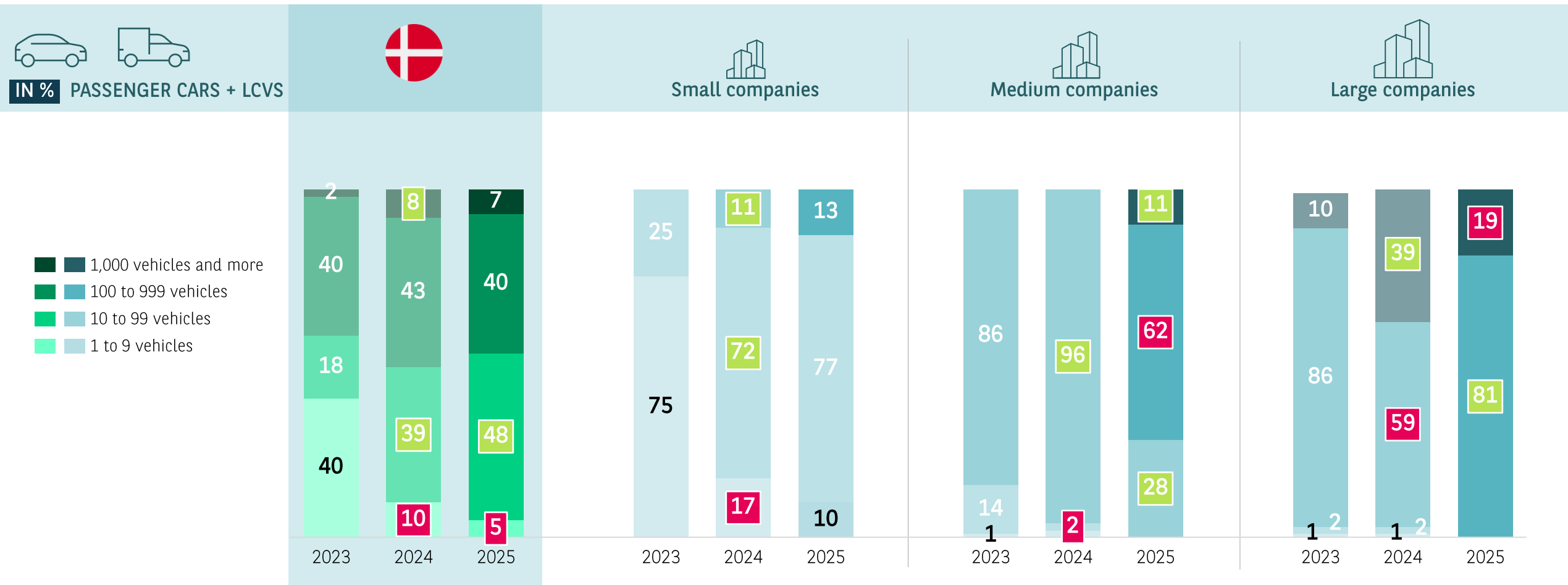
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

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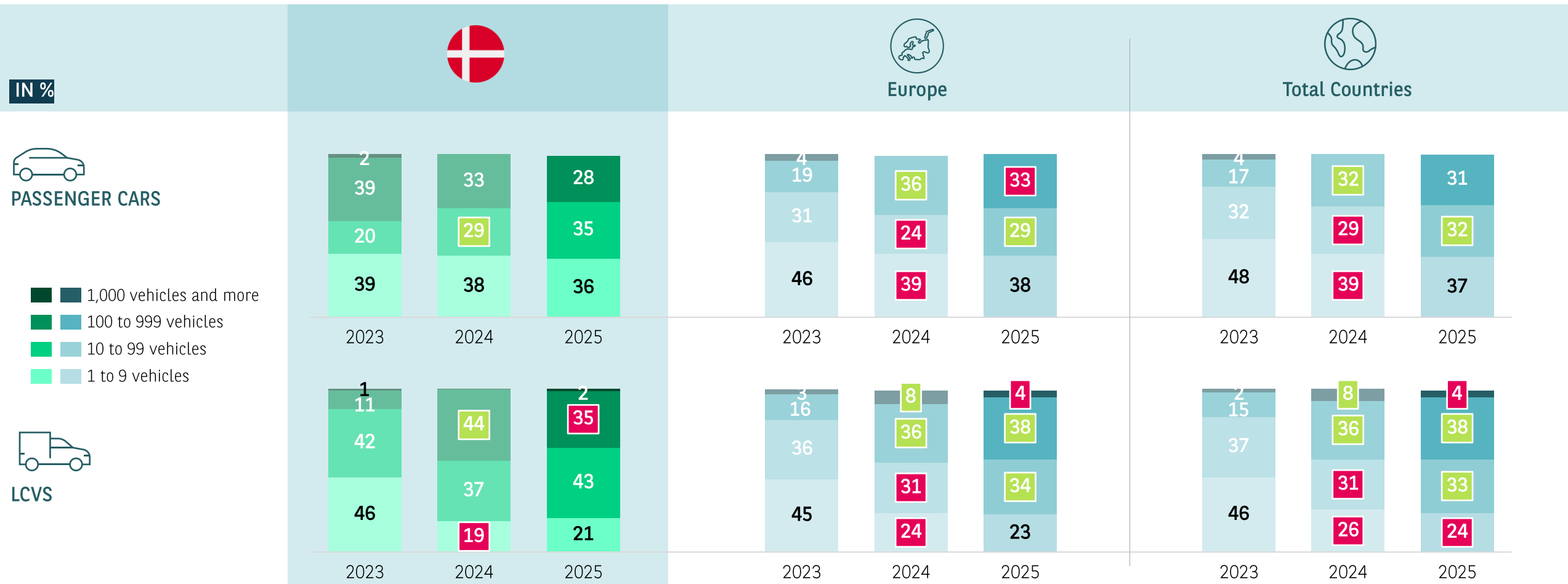
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
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NUMBER OF PASSENGER CARS AND LCVs IN FLEETS

HOW TO READ THE RESULTS ?

In Denmark in 2025, passenger car fleets are composed of: 36% with 1-9 vehicles, 35% with 10-99 vehicles, 28% with 100-999 vehicles and 0% with 1000 or more.
And LCV fleets are composed of: 21% with 1-9 vehicles, 43% with 10-99 vehicles, 35% with 100-999 vehicles and 2% with 1,000 or more.



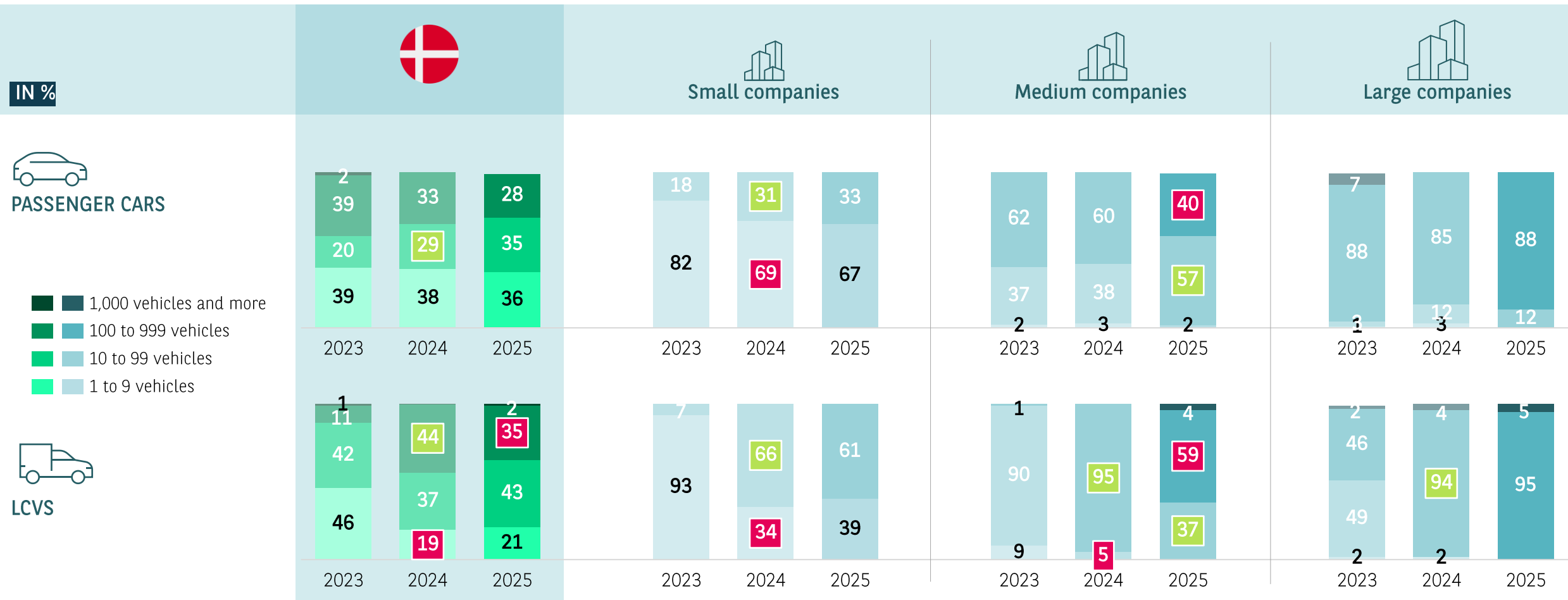
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

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NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

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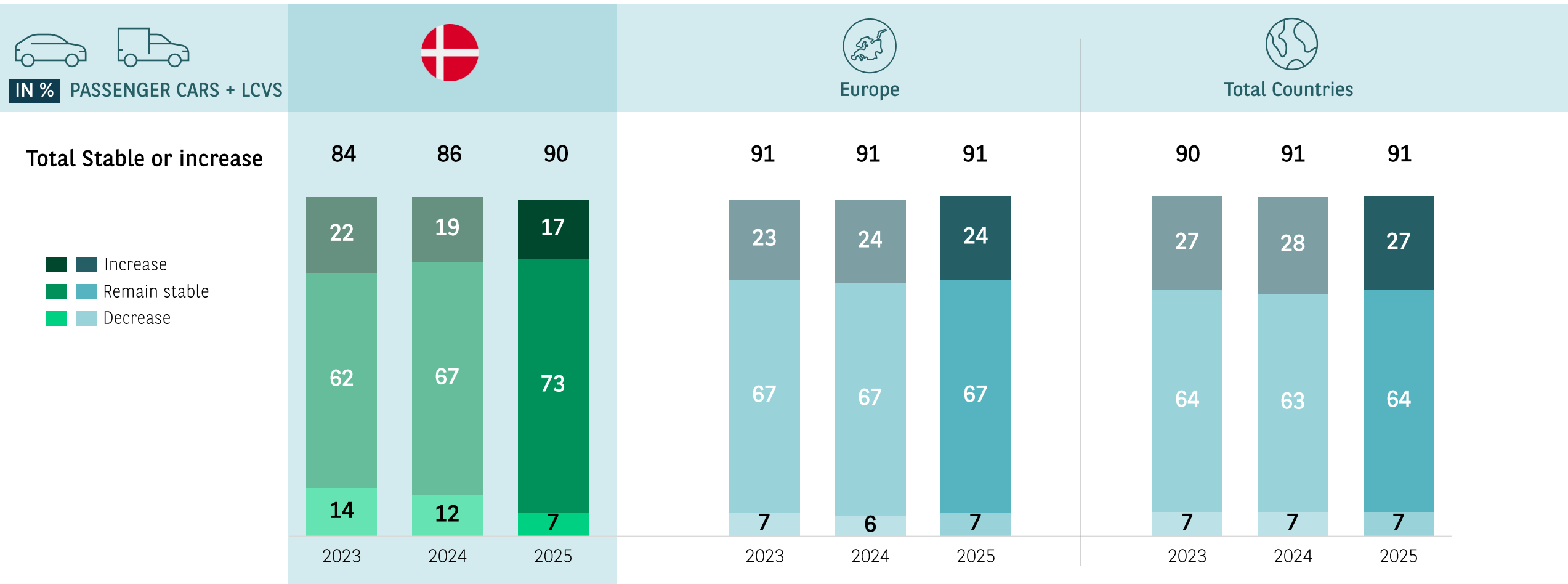
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
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X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 90% of the companies expect their fleet to remain stable or to increase in the next 3 years.



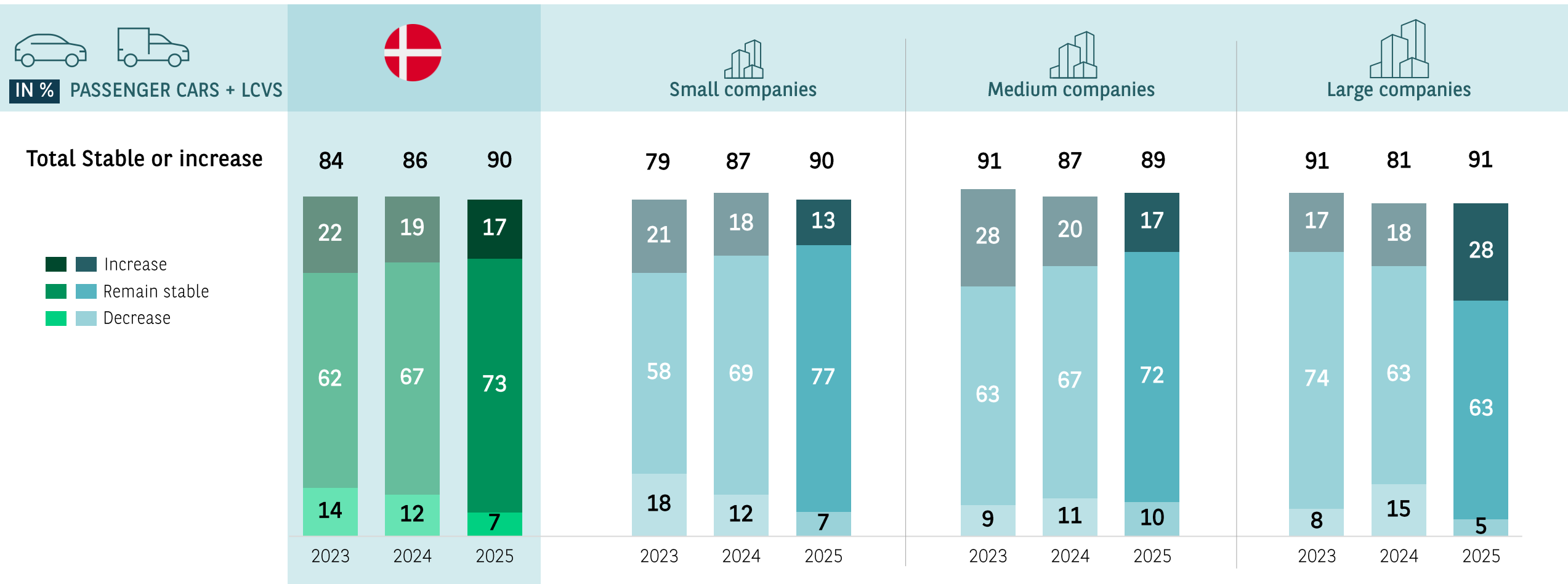
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
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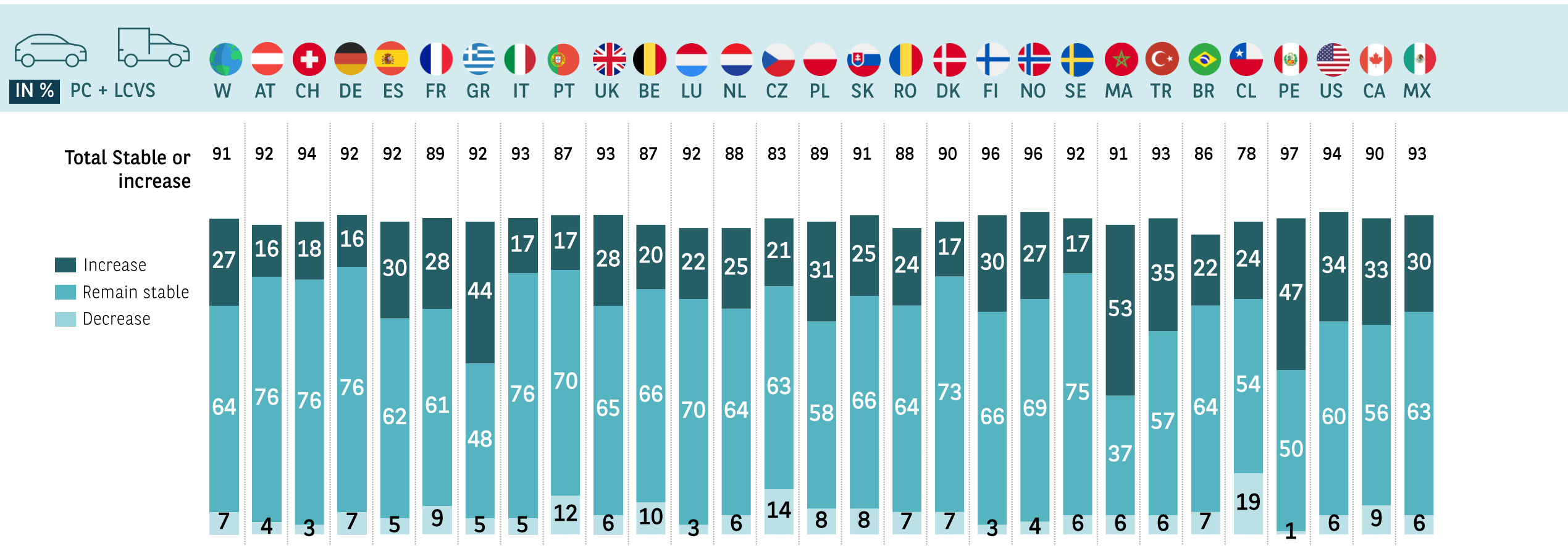
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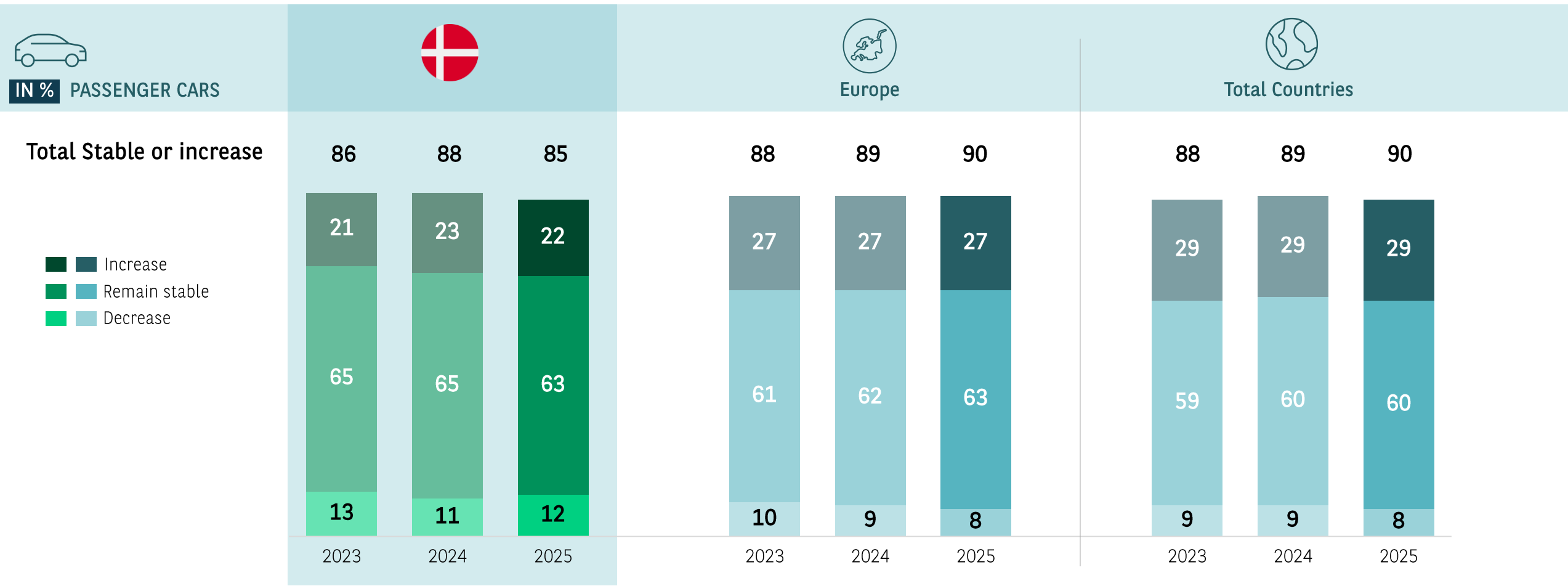
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?

Basis: companies with corporate vehicles = 100%

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 85% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



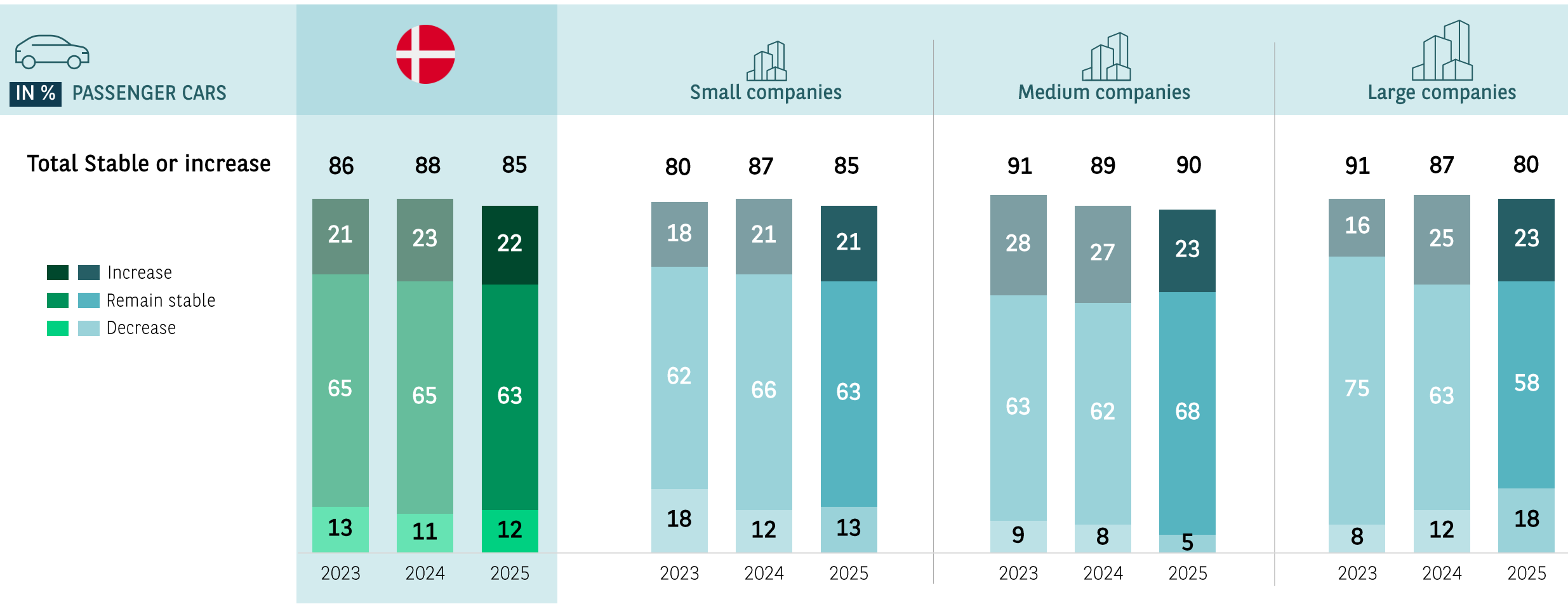
A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 85% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



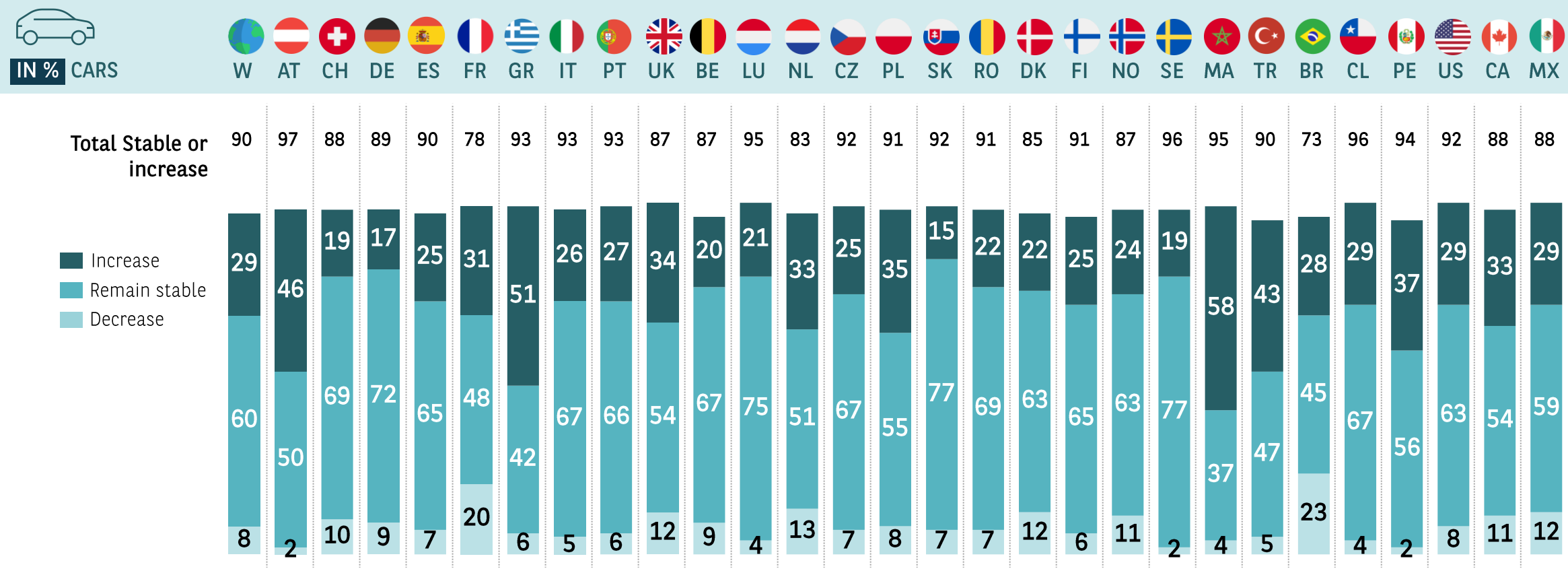
A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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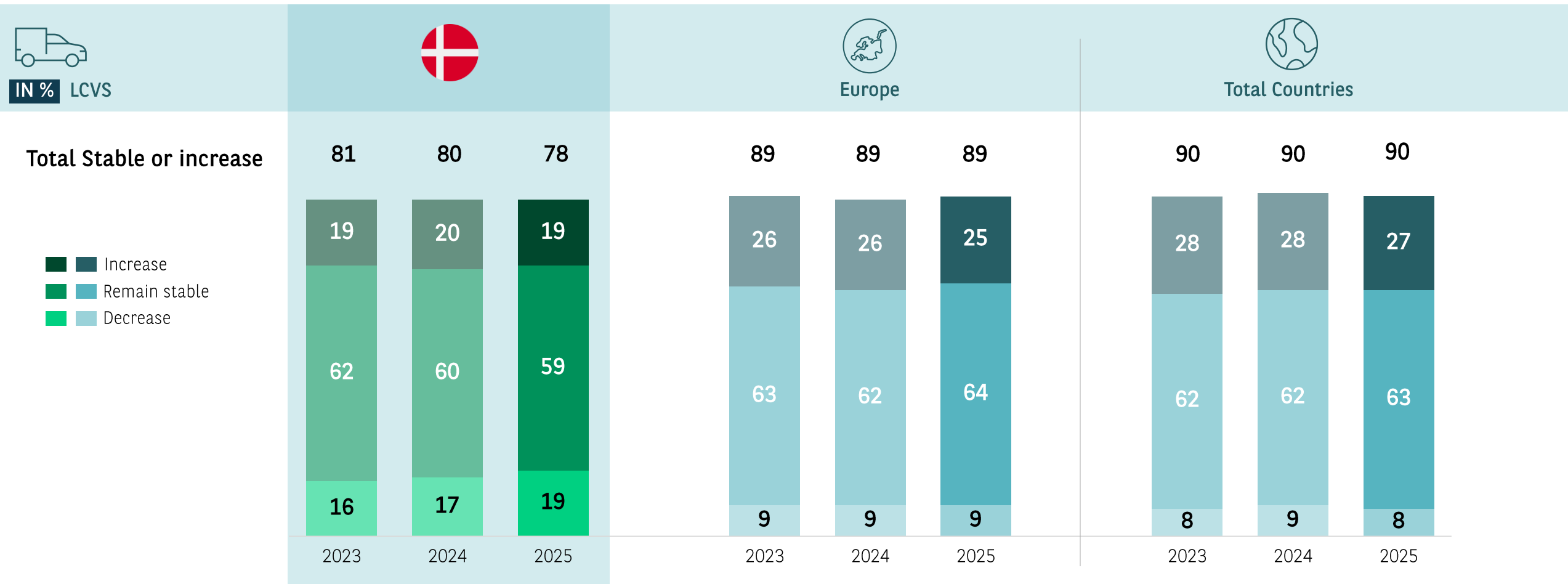


A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 78% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



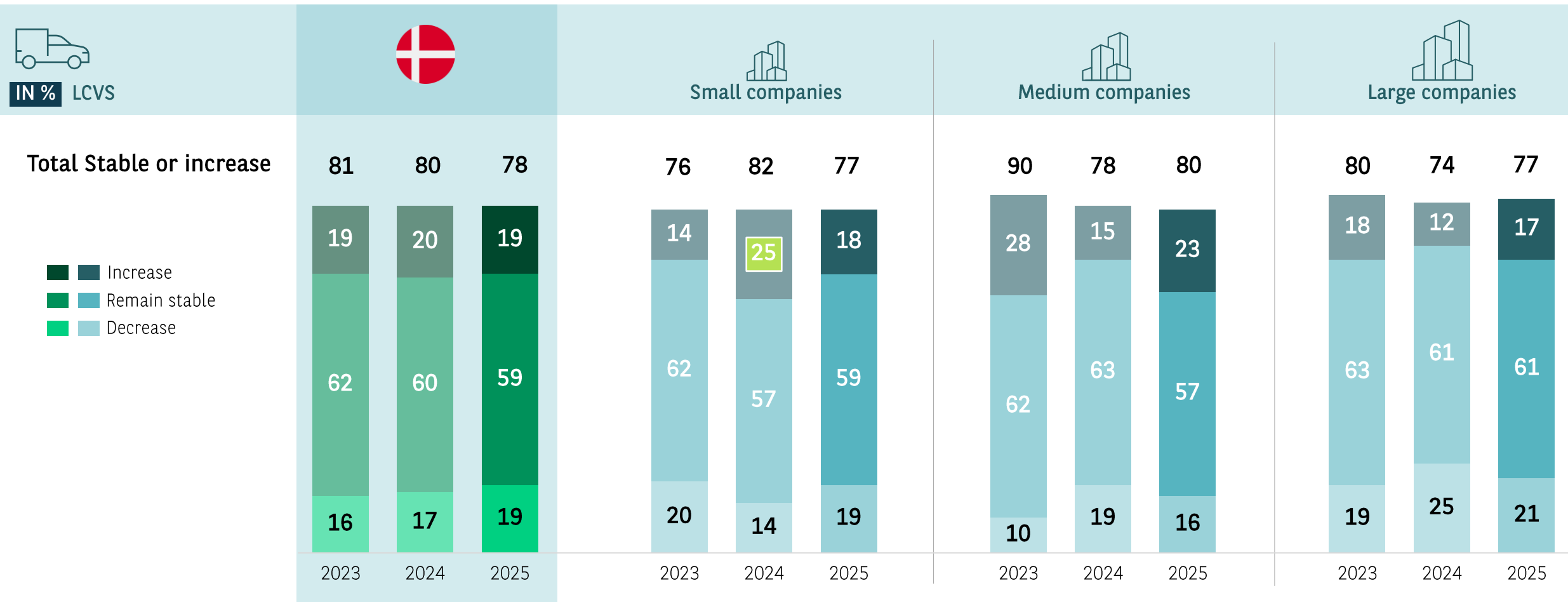
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

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X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

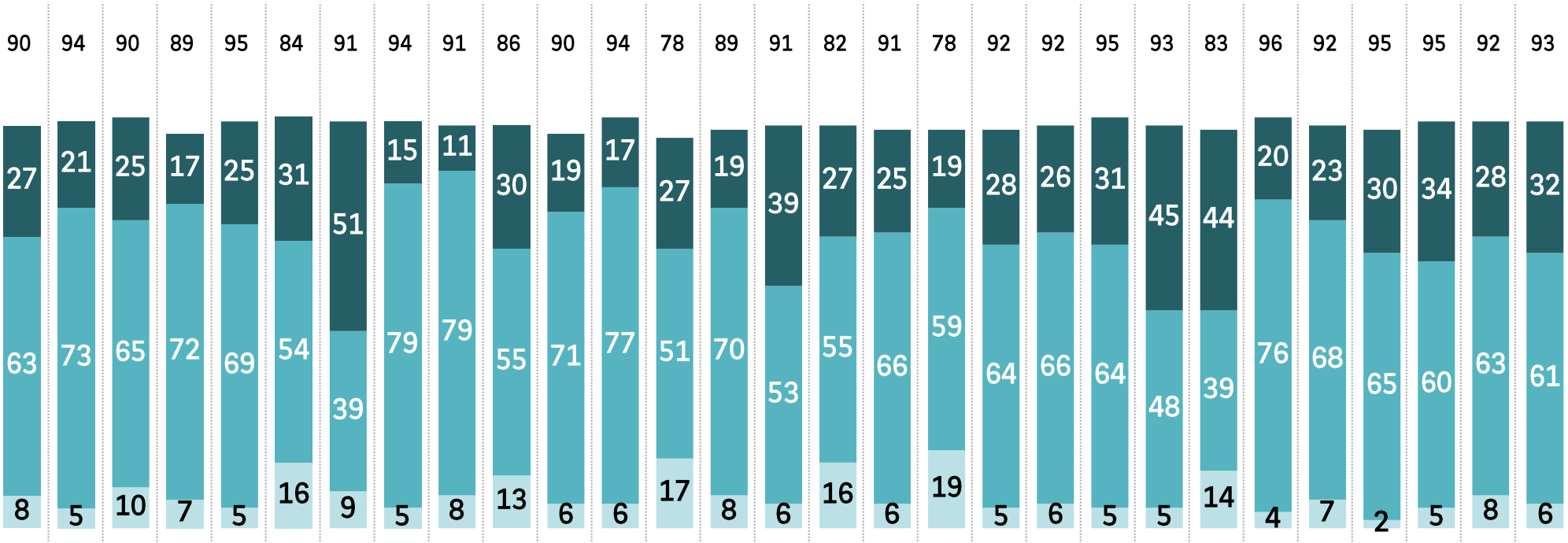
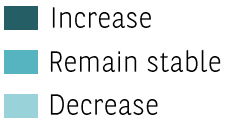
In Denmark in 2025, 78% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



IN % LCVS



Total Stable or increase

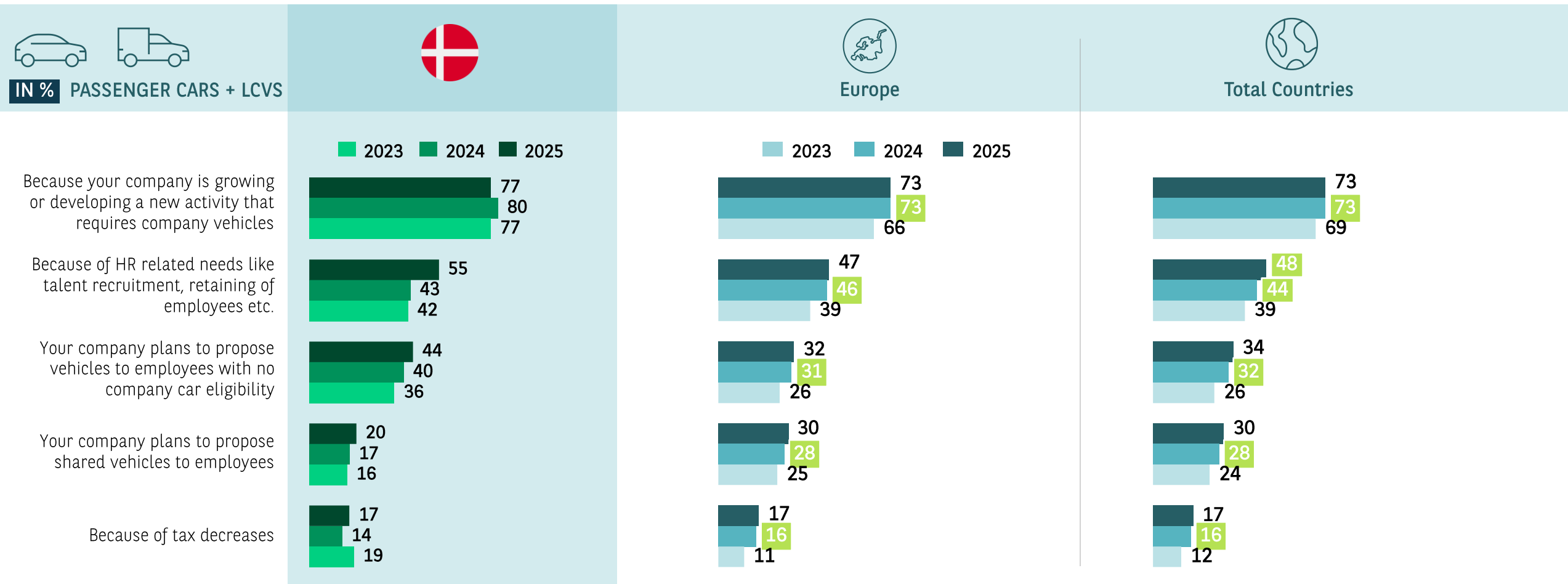


A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

REASONS FOR FUTURE FLEET INCREASE

HOW TO READ THE RESULTS ?

In Denmark in 2025, 77% 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.

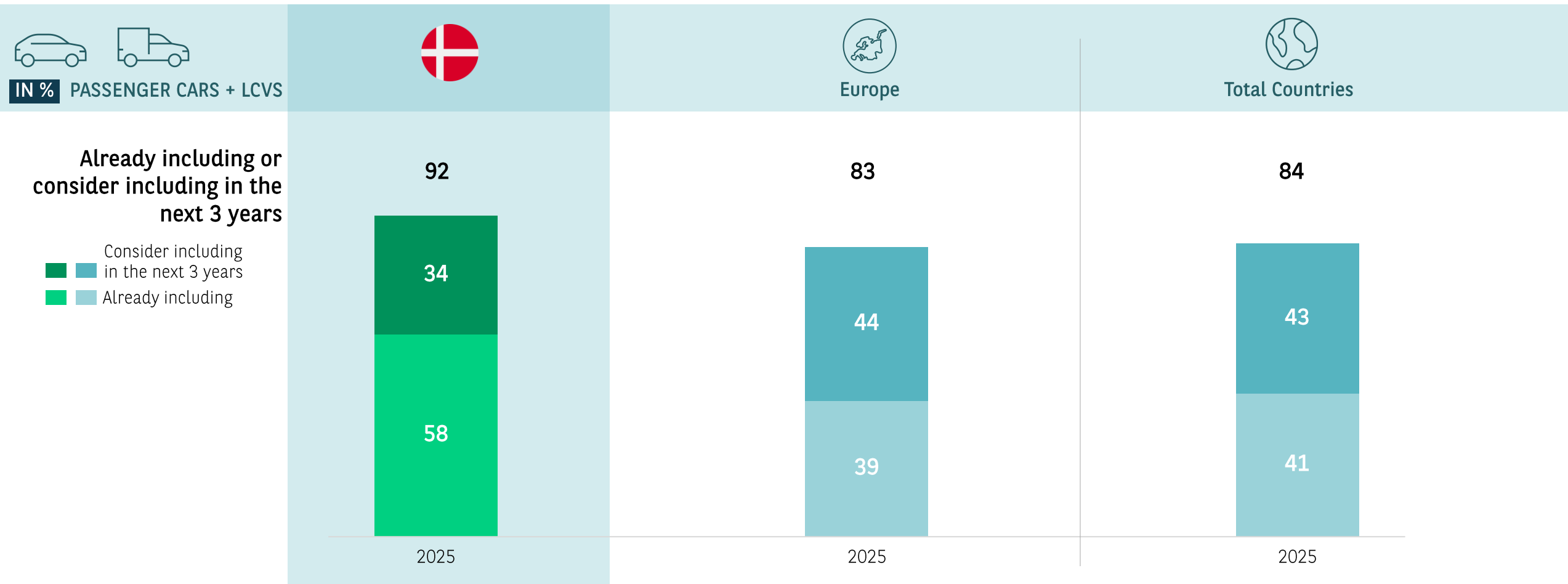


A8A. Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

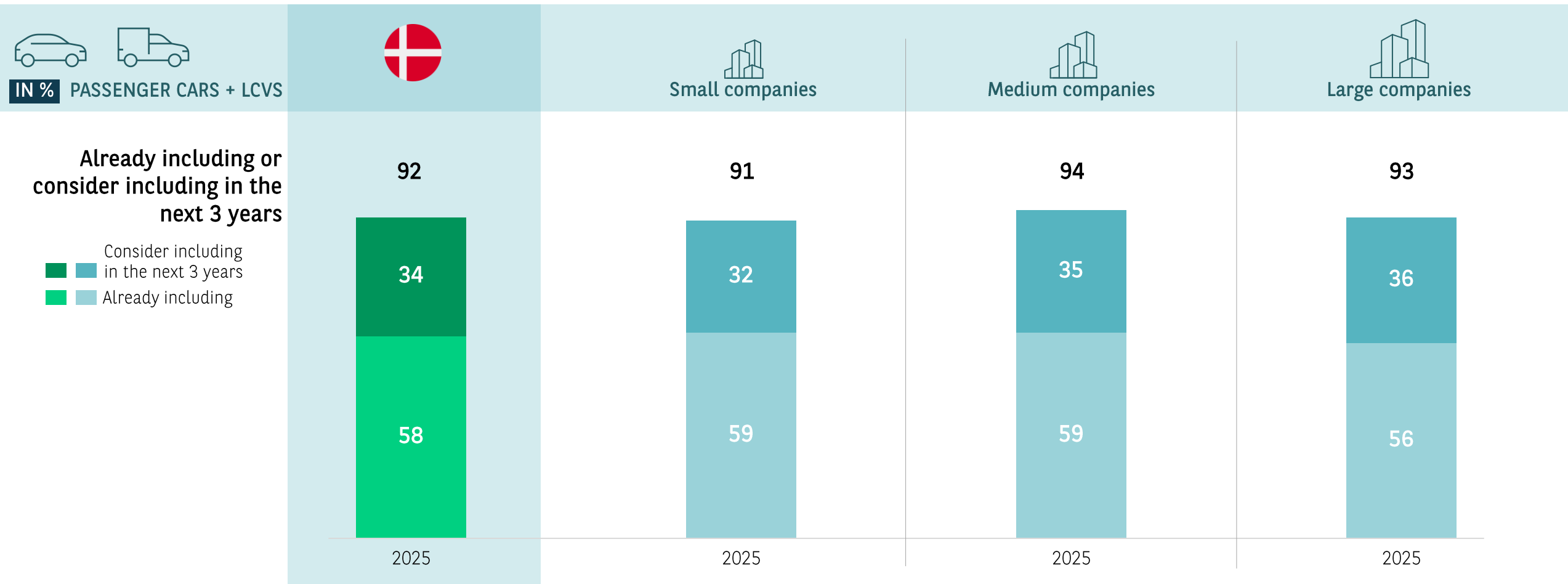
In Denmark in 2025, 92% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



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 ?

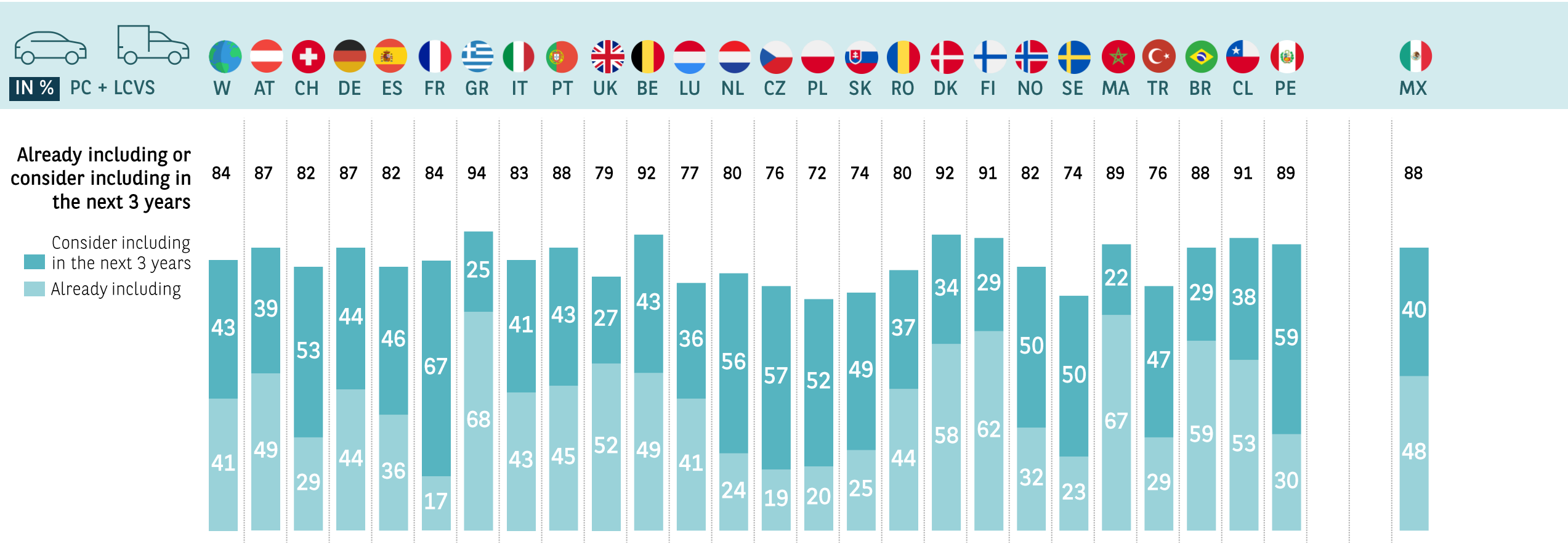
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HOW TO READ THE RESULTS ?

In Denmark in 2025, 72% of the companies are already including or are considering including passenger cars that were not new when acquired.
76% 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?
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HOW TO READ THE RESULTS ?

In Denmark in 2025, 72% of the companies are already including or are considering including passenger cars that were not new when acquired.
76% 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



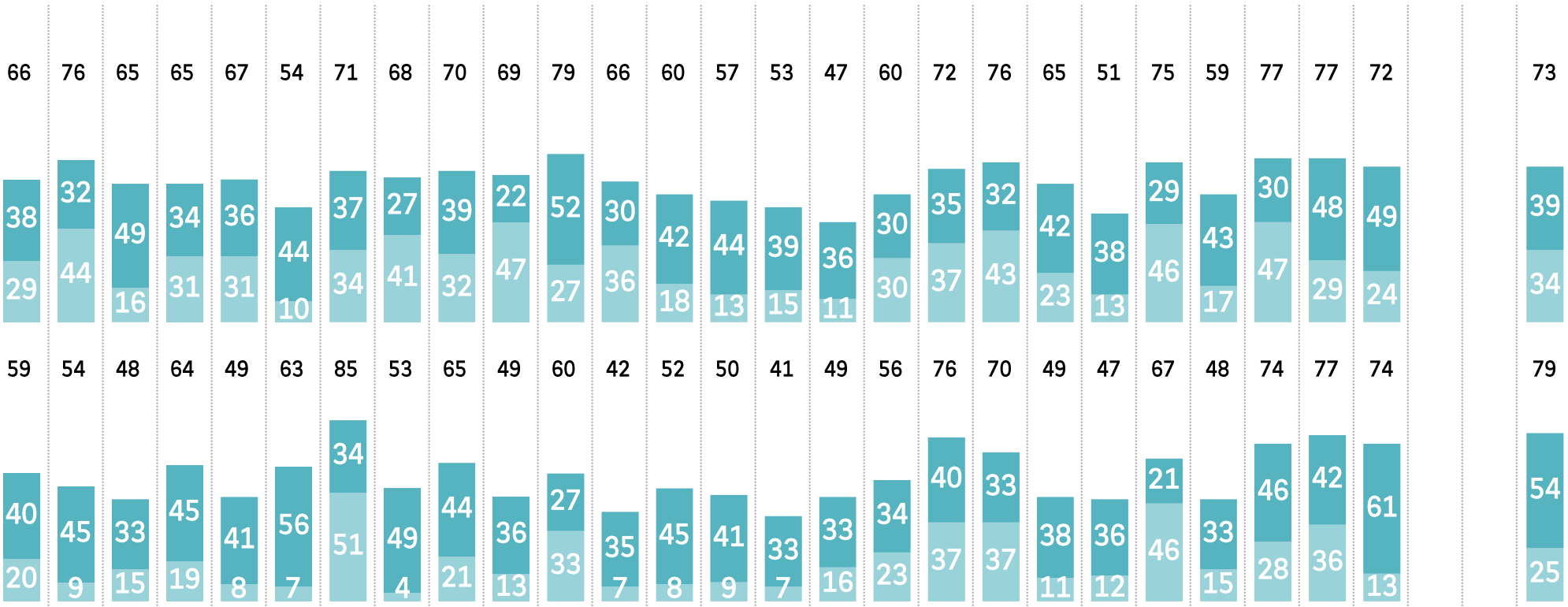
PASSENGER CARS

Consider including in the next 3 years
Already including

Already including or consider including in the next 3 years



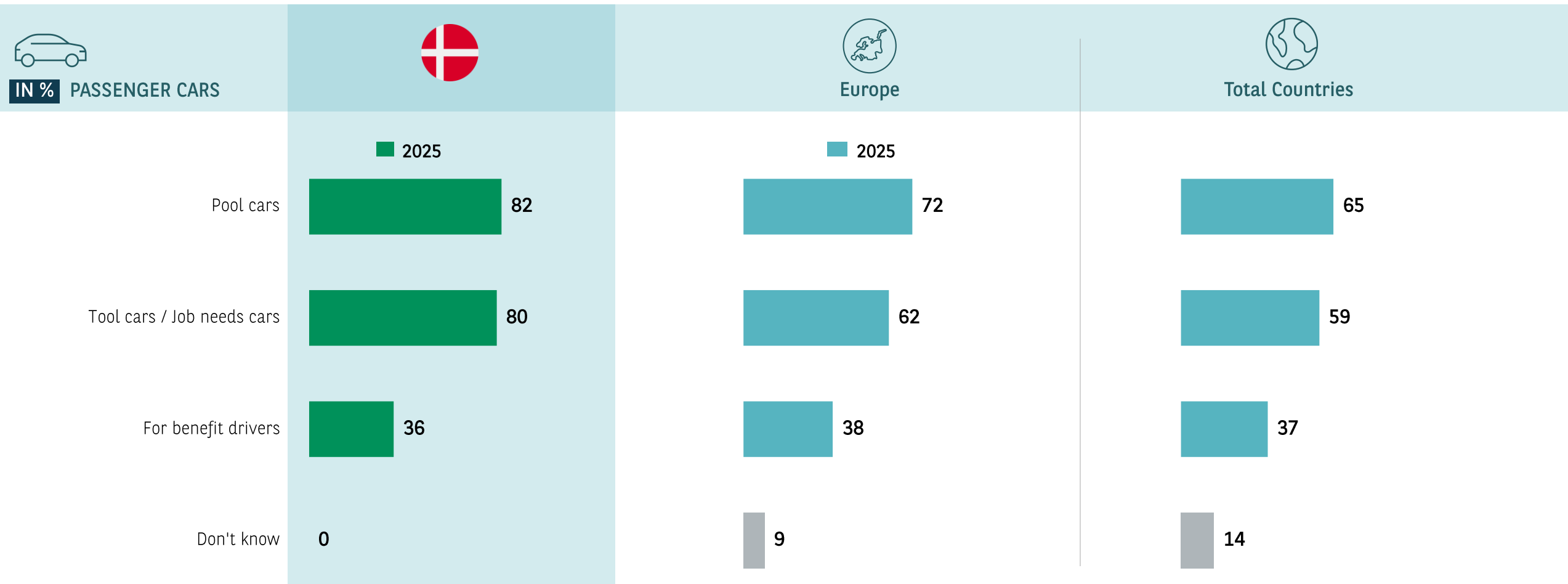
LCVS



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 Denmark in 2025, 82% 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 the 3rd financing method used by 2 out of 10 Danish companies

22% of Danish companies use Operational leasing as main financing method for their fleets (stable compared to 2024), while outright purchase (33%) and financial leasing (38%) respectively rank 2nd and 1st as main methods. The same consistent ranking can be observed across company sizes. Financial leasing is used more often as a main method by the Danes than in Europe as a whole (9-point significant difference).

The potential for growth in Operational leasing / Full-service leasing remains stable vs 2024, but below the benchmark

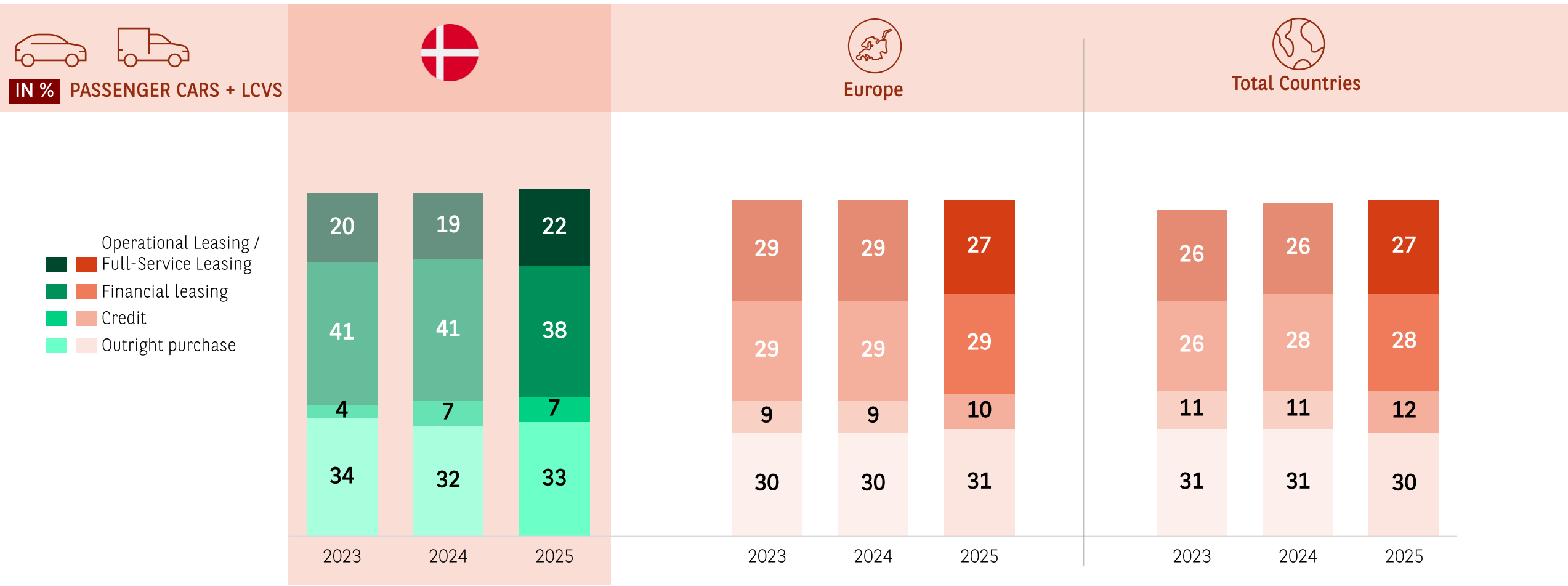
With a steady share over the last 3 years, **22%** of Danish companies are considering either introducing full-service leasing or expanding it within their fleet financing strategies, vs 36% for the European average.

This interest doesn't increase in larger companies.

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Denmark in 2025, 22% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.



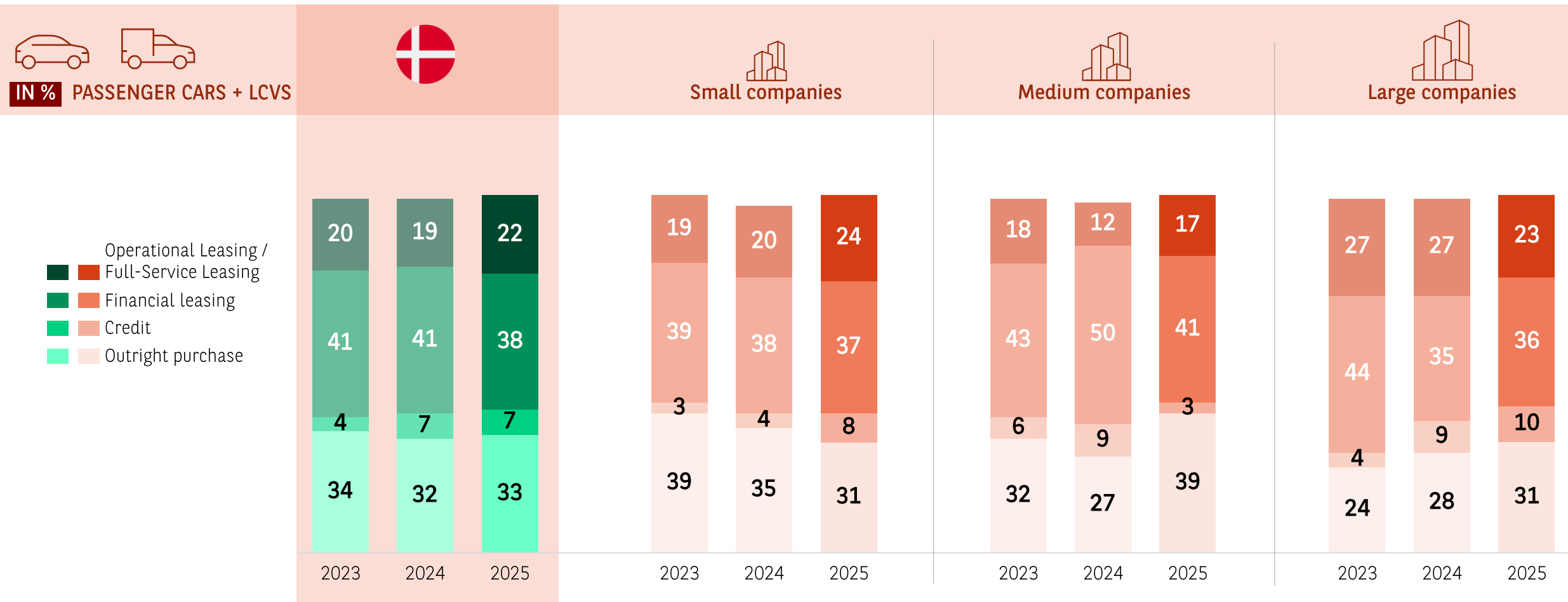
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

MAIN FLEET FINANCING METHOD

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In Denmark in 2025, 22% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.



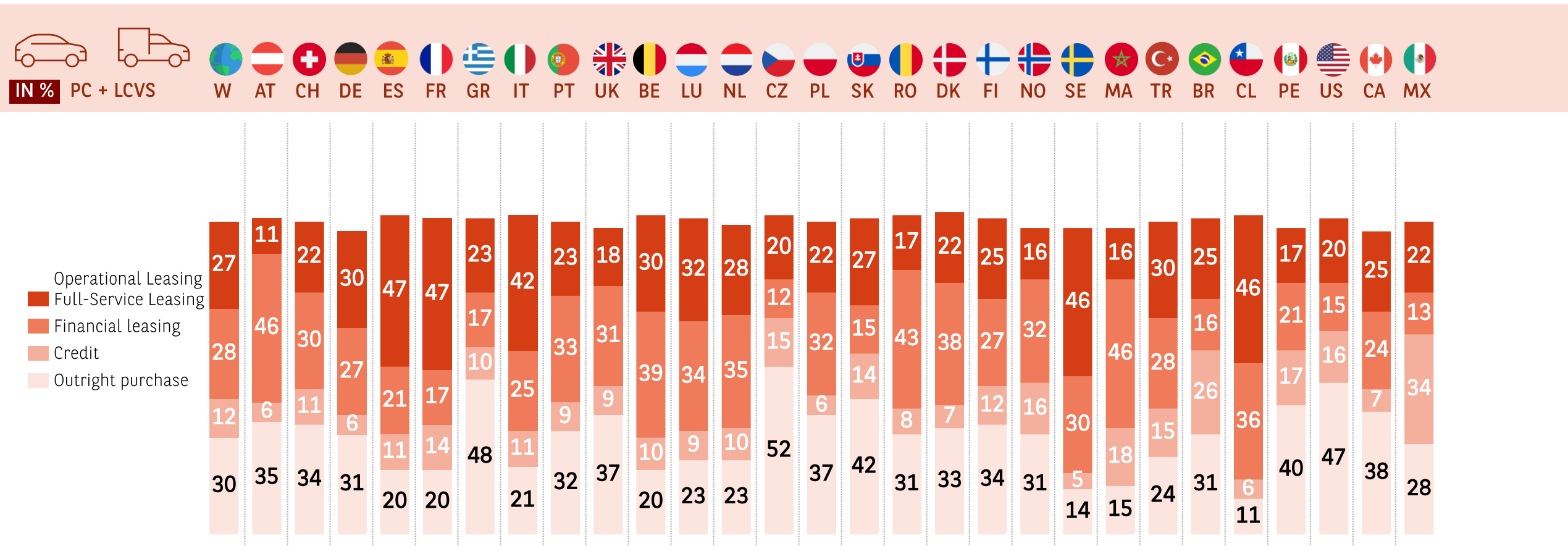
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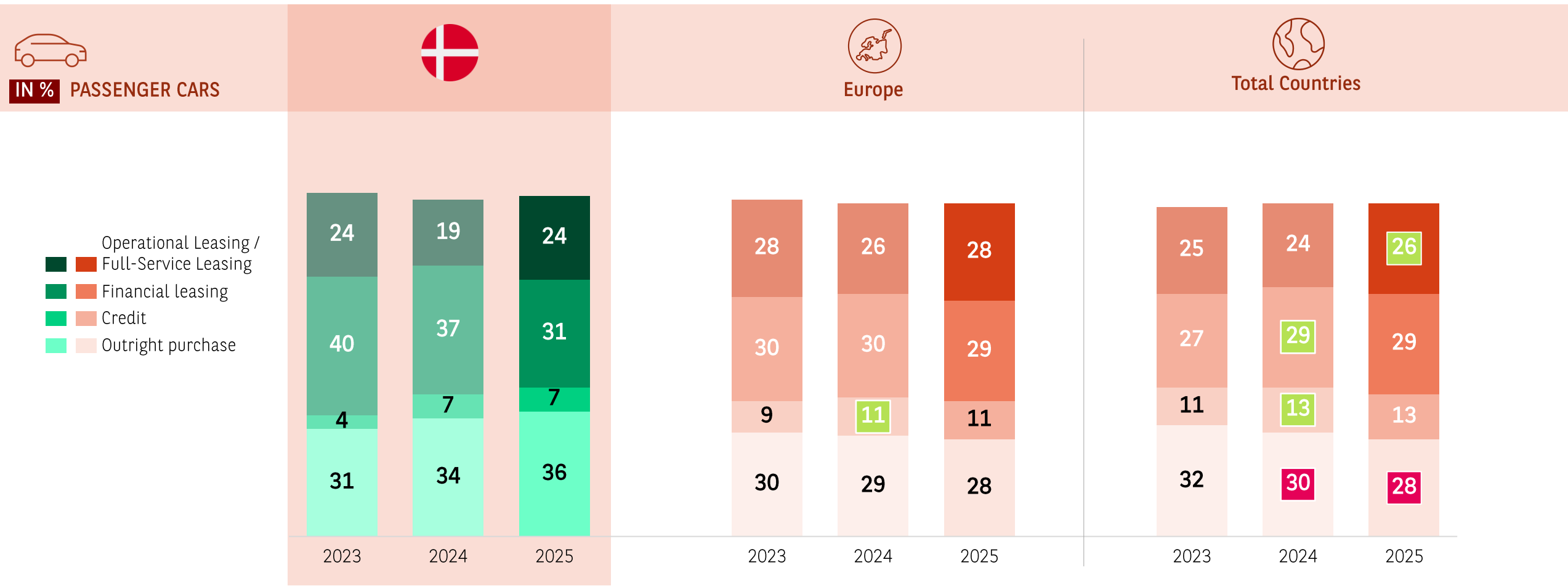


B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Denmark in 2025, 24% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



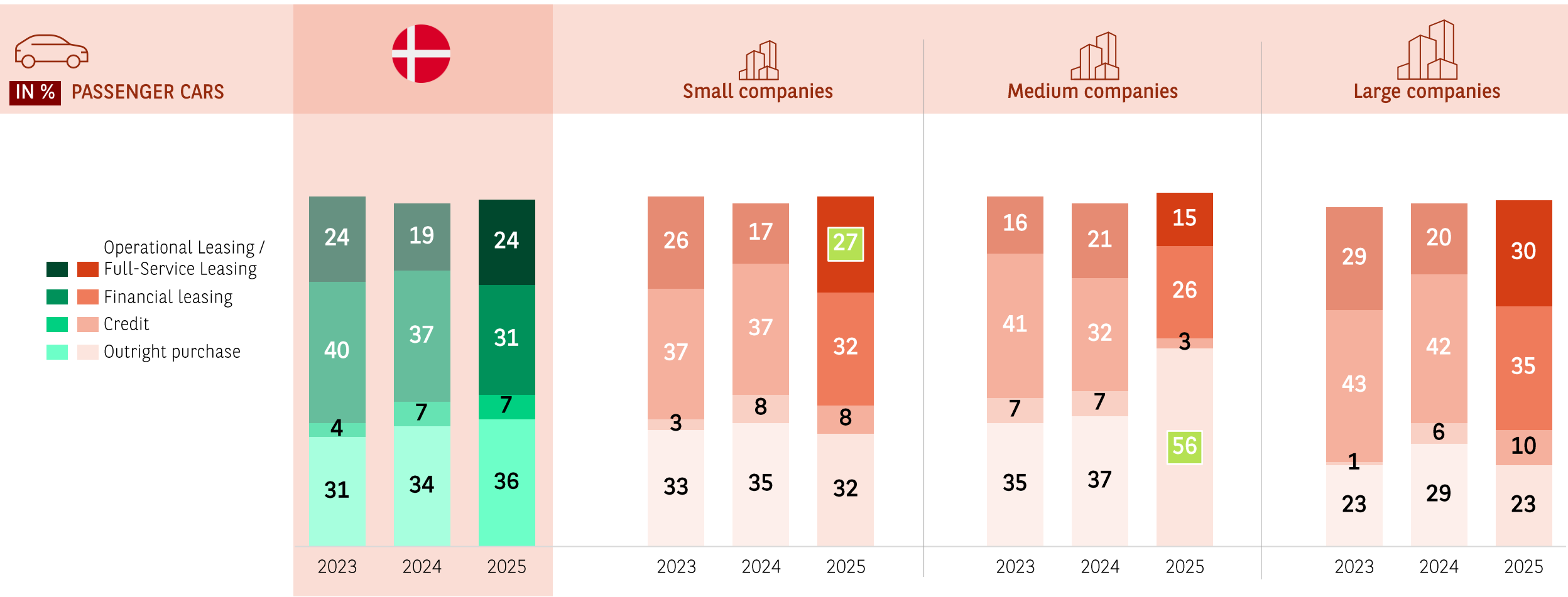
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Denmark in 2025, 24% 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 ?

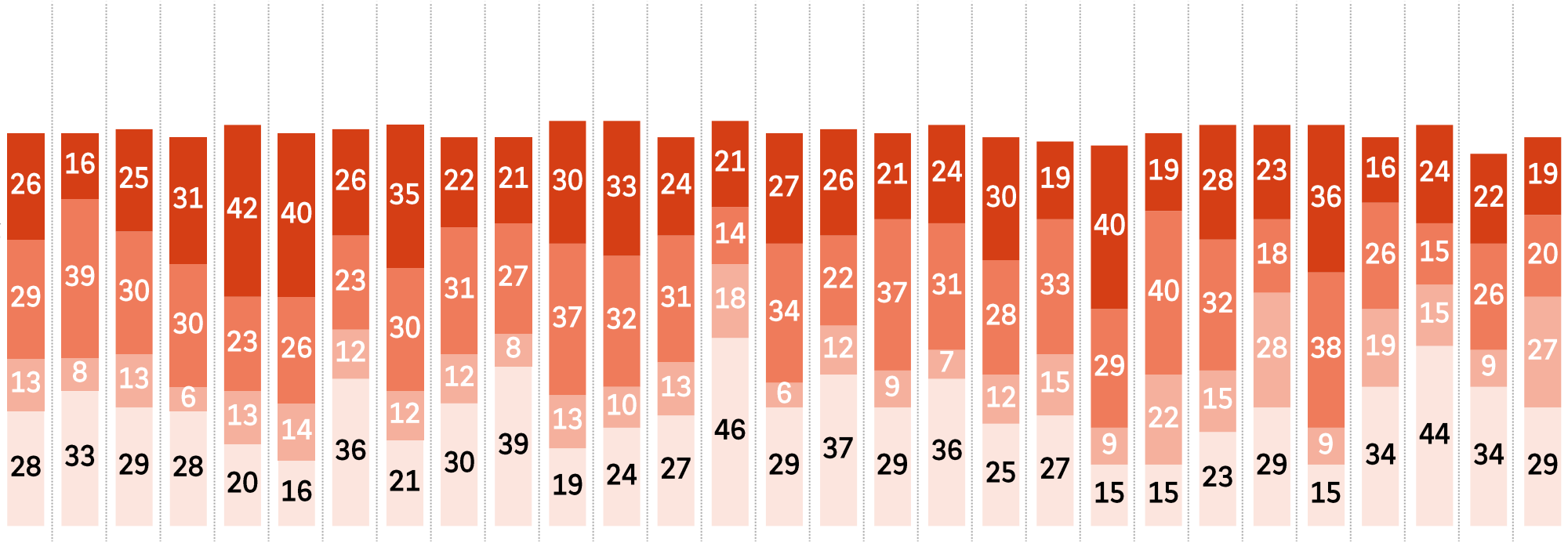
In Denmark in 2025, 24% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



IN % CARS



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

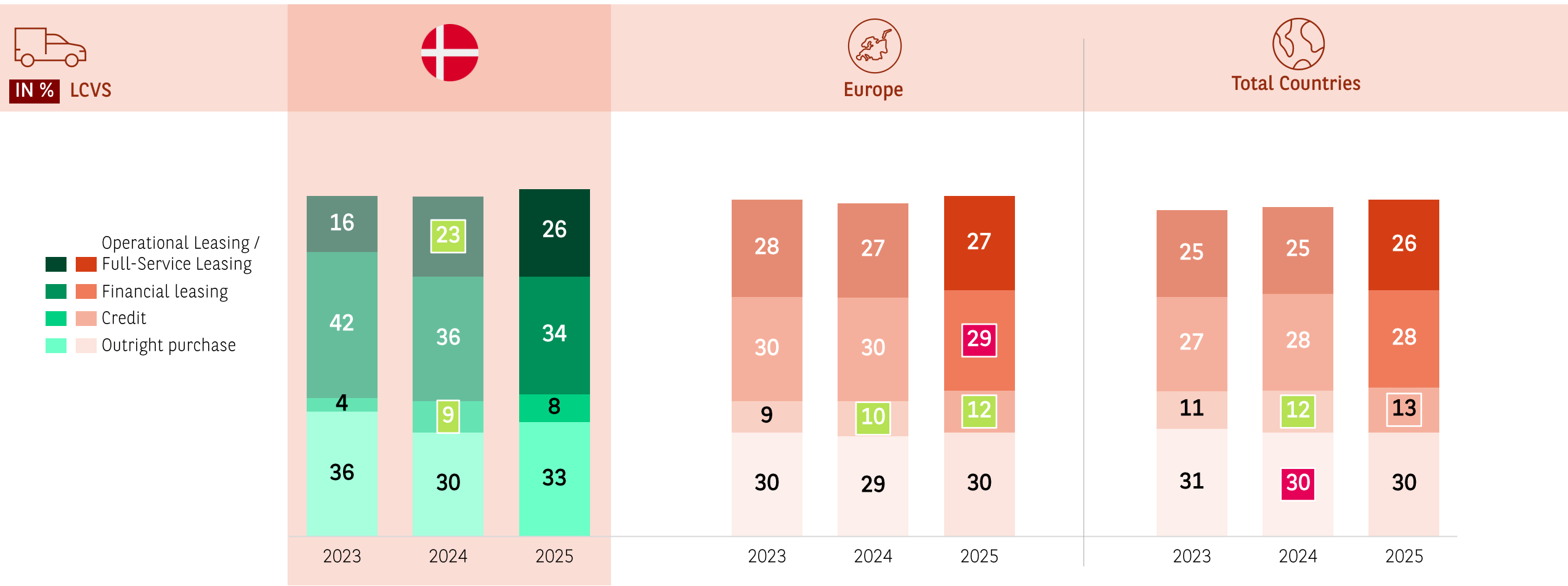


B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Denmark in 2025, 26% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



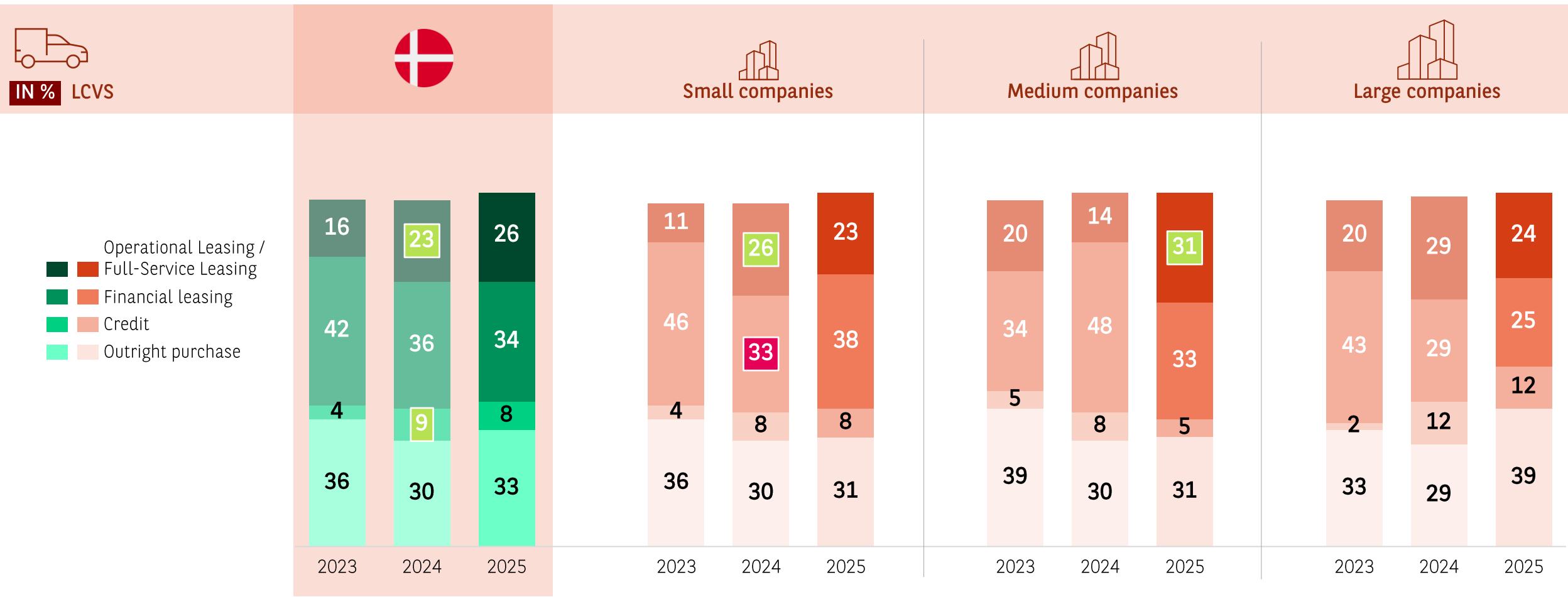
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Denmark in 2025, 26% 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

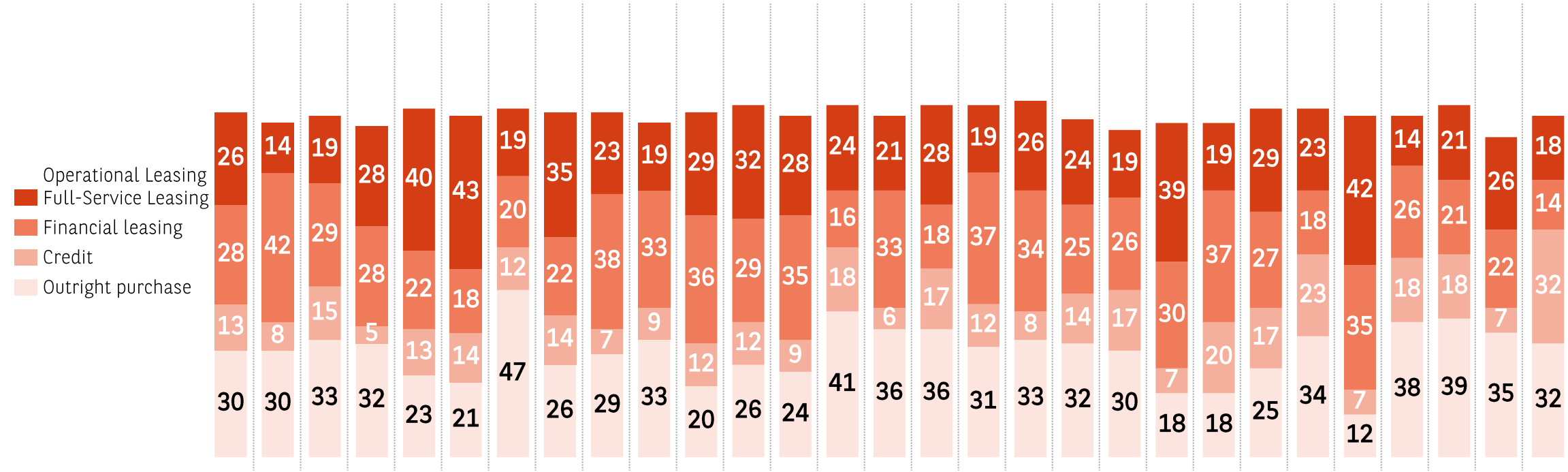
MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Denmark in 2025, 26% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



IN % LCVS

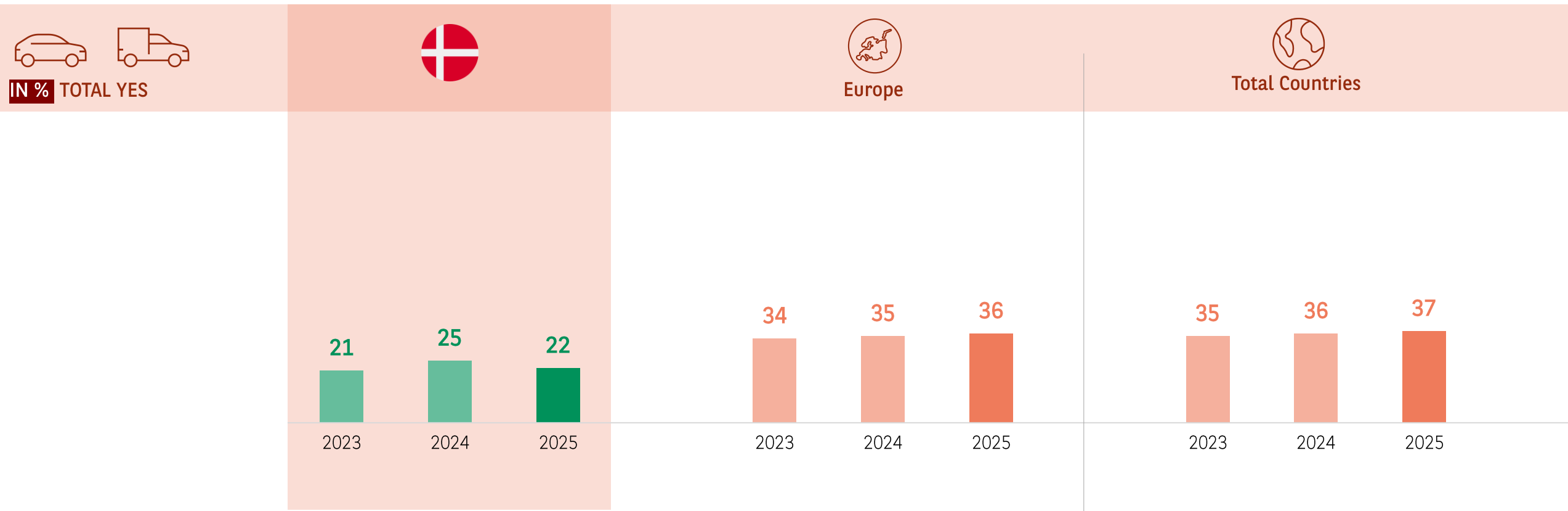


B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Denmark in 2025, 22% 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.



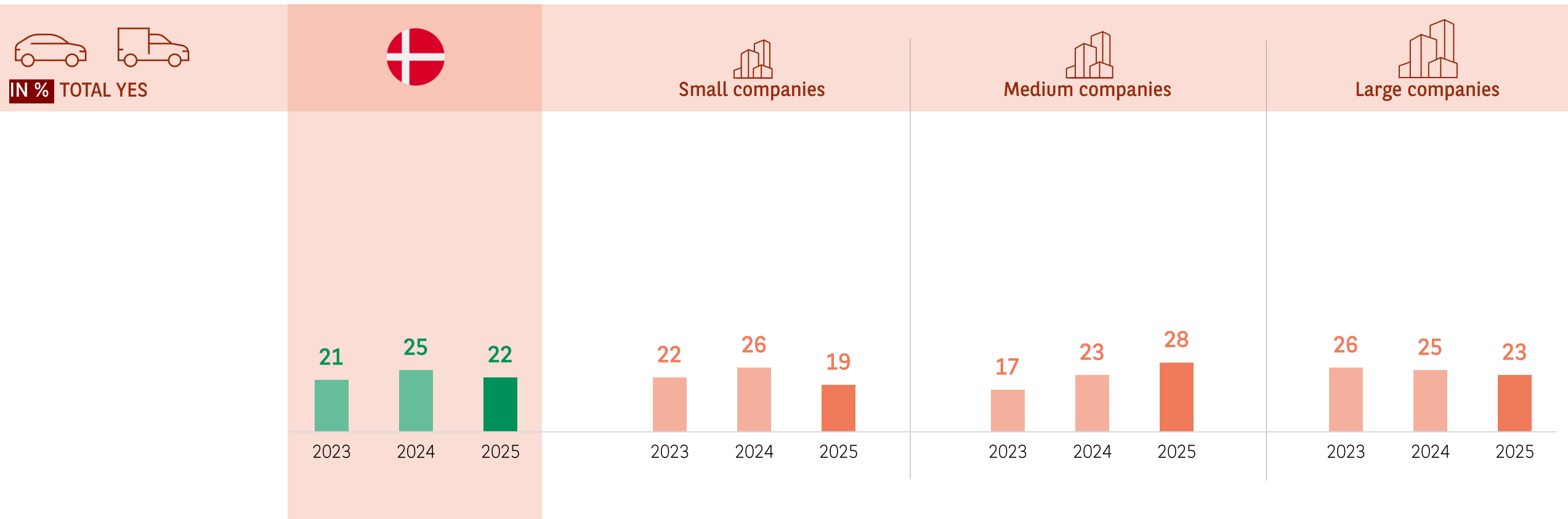
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

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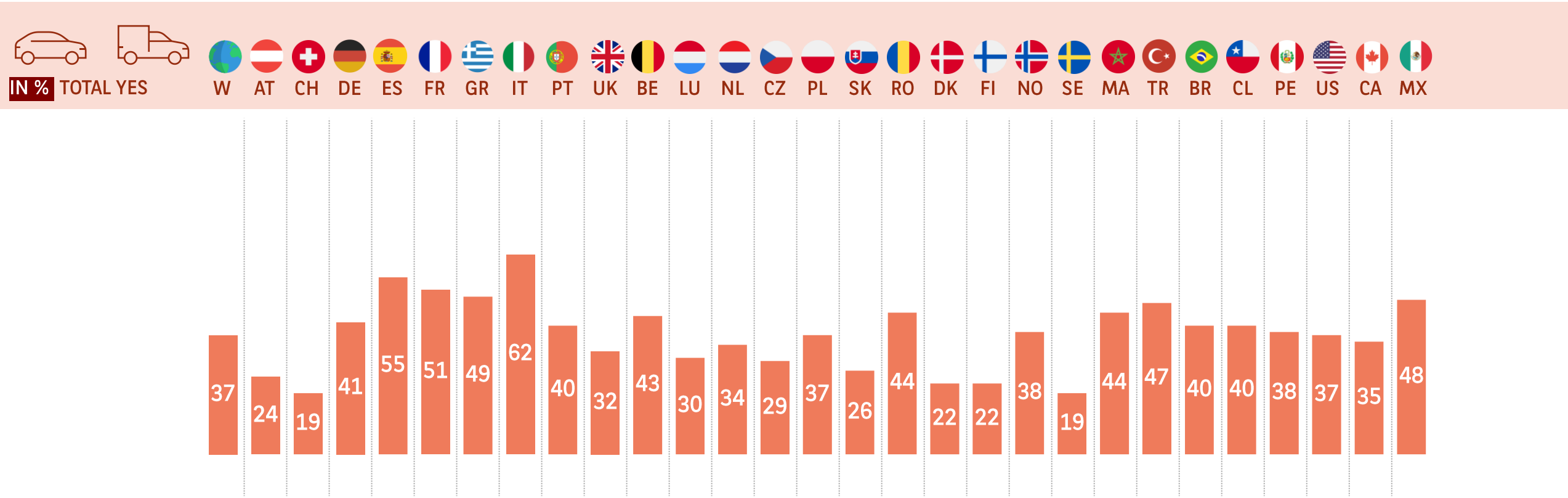
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
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INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

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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%

03

ENERGY MIX

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



Danish companies maintain a strong implementation of energy technologies in their passenger cars fleets

In 2025, **55%** of Danish companies have implemented at least one electrified technology (HEV, PHEV or 100% BEV) for passenger cars. This trend has been steady since 2023 and remains similar to the European average (56%). When considering future plans for adoption, this figure rises to 76%, aligned with European benchmark (75%).

Small, medium-sized or large Danish companies show comparable implementation rates in 2025.

Battery electric vehicles (BEVs) remains a strong alternative for Danish passenger cars fleets' transition

Regarding Passenger Cars, adoption of PHEV (**26%**), BEV (**25%**) and hybrid (**21%**) is stable in Denmark in 2025.

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

40% of Danish companies report that environmental impact is the primary motivator for their transition to electric passenger cars, a trend consistent with other European markets. They are also more and more willing to fulfill their employees' requests (37% vs 20% in Europe).

Fuel expenses reduction (34%) is emerging as the third most important motivation.

The shift for electrified LCVs fleets remains more complicated

As far as the LCVs (light commercial vehicle) fleets are concerned, the adoption of battery electric vehicles (BEVs) has dropped over the past two years (**3%** in 2025 vs 8% in 2023), as well as their consideration (-5 points in 2025). This downward trend aligns with observations in other European markets.

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

62% to **59%** of Danish companies mention charging points limitations as a constraint for using electric passenger cars and LCVs, in line with the European market.

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

89% have or plan to implement a charging policy. This applies consistently across all company sizes.

Public charging is part of the strategy for **54%** of companies, of which 54% support energy cost (36% via expense claim and 18% via energy cards), while 46% do not reimburse energy costs.

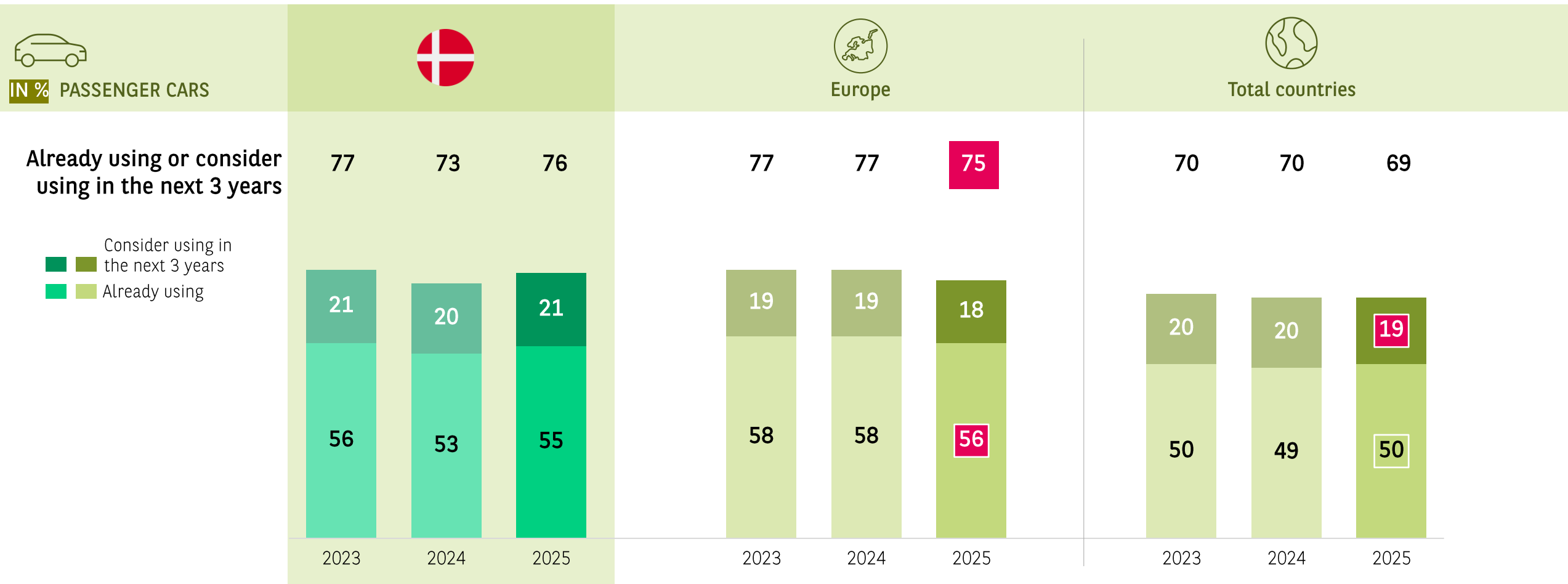
Company premises charging is a current or future strategy for **53%** of companies, with among them 44% installing or considering charging points, and 70% requiring or planning to require employee payment for the charging.

Home charging is a strategy for **52%** of companies, of which 54% support or plan to support home charger installation, with 98% covering at least part of the box and installation cost, and 54% reimbursing some energy costs.

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

HOW TO READ THE RESULTS ?

In Denmark in 2025, 76% 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.



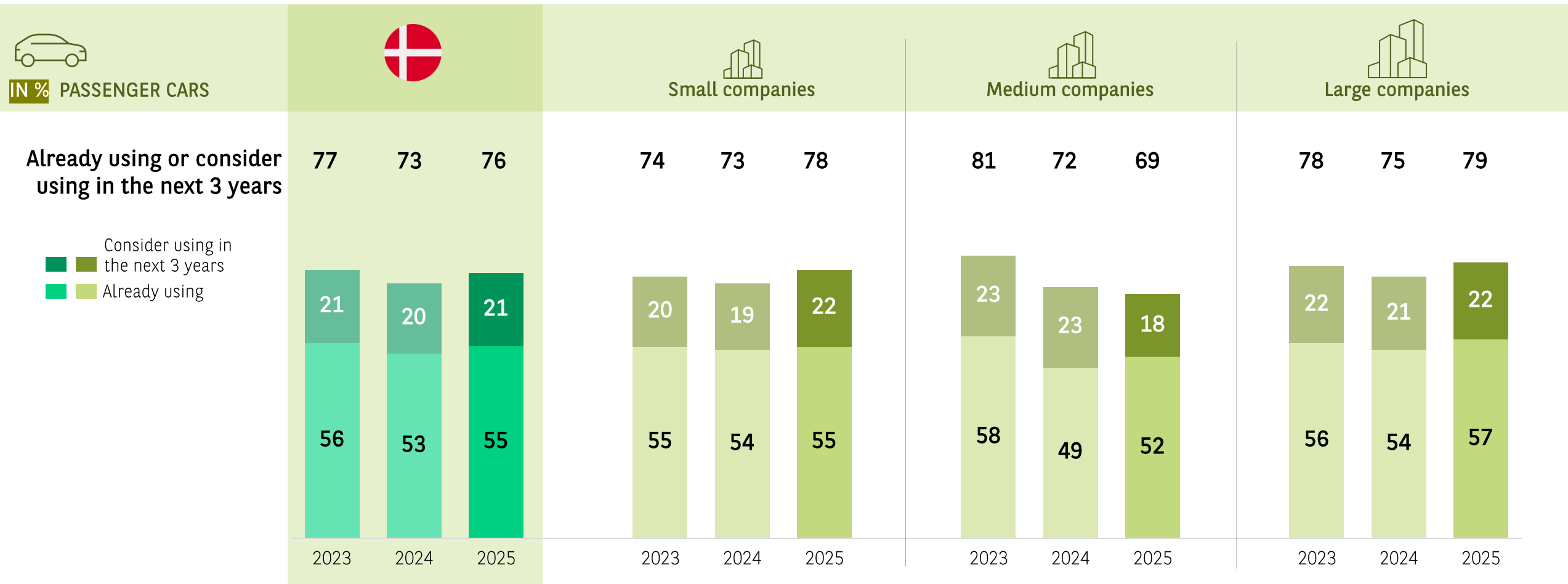
E28. Amongst the following alternative energy technologies, which ones do you currently use...? /
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

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

HOW TO READ THE RESULTS ?

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Basis: companies with passenger cars

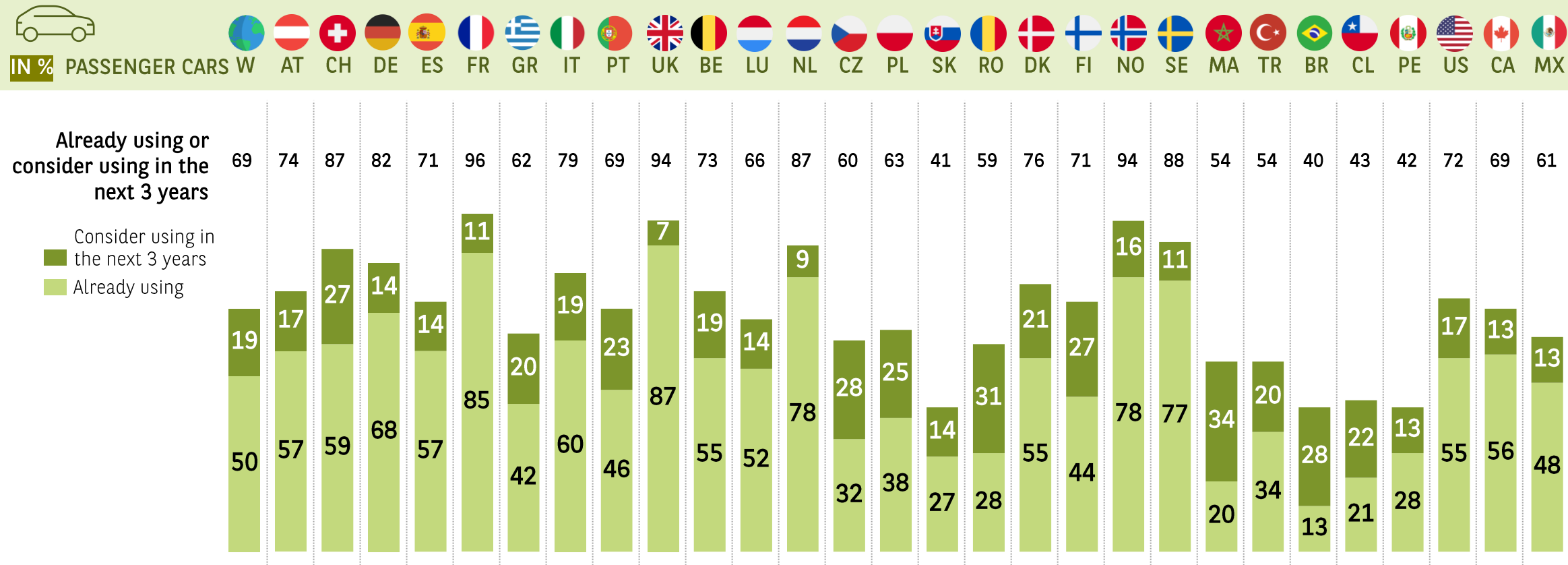
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

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

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Denmark in 2025, 46% 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	25	20	46	22	17	39	19	15	34
	2024	23	19	42	24	17	42	20	16	36
	2023	21	23	44	23	16	40	19	15	34
PHEV	2025	26	10	37	28	14	41	23	13	36
	2024	28	13	41	29	14	43	23	13	36
	2023	30	12	43	29	15	44	23	14	37
HEV	2025	21	10	31	27	13	40	24	13	37
	2024	20	10	29	28	14	42	23	14	38
	2023	20	13	33	29	14	44	26	14	41

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

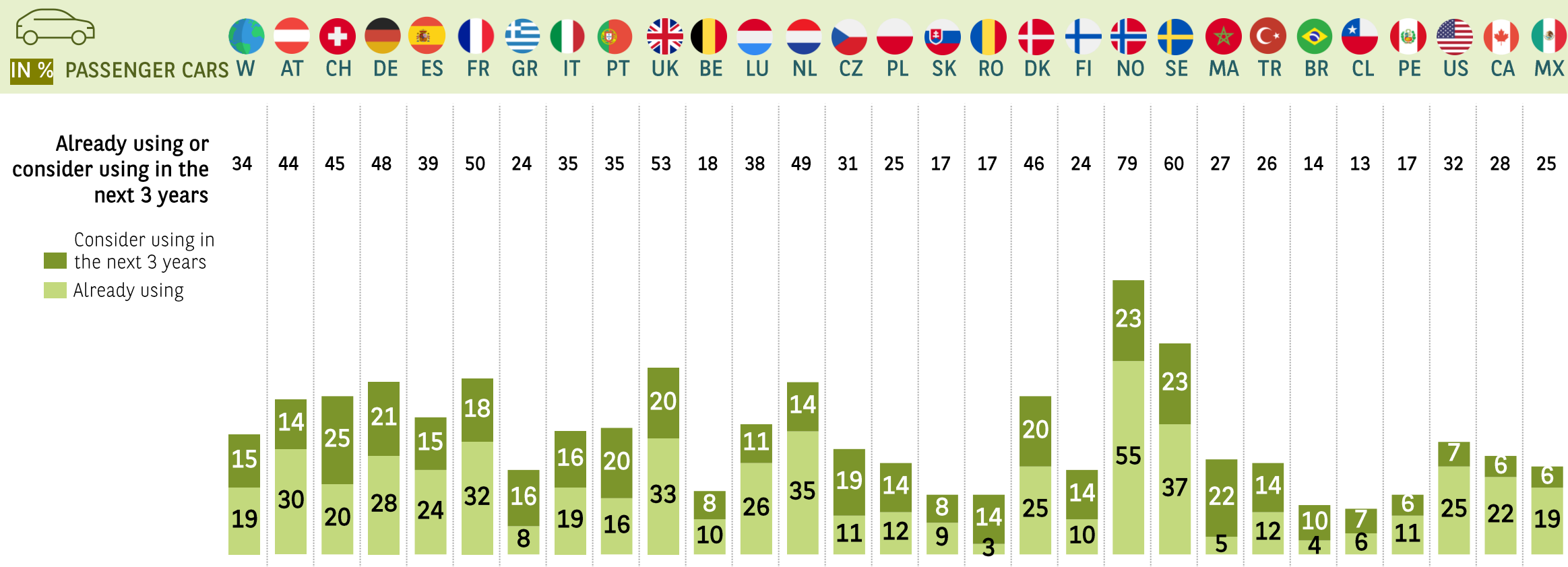
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Denmark in 2025, 46% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



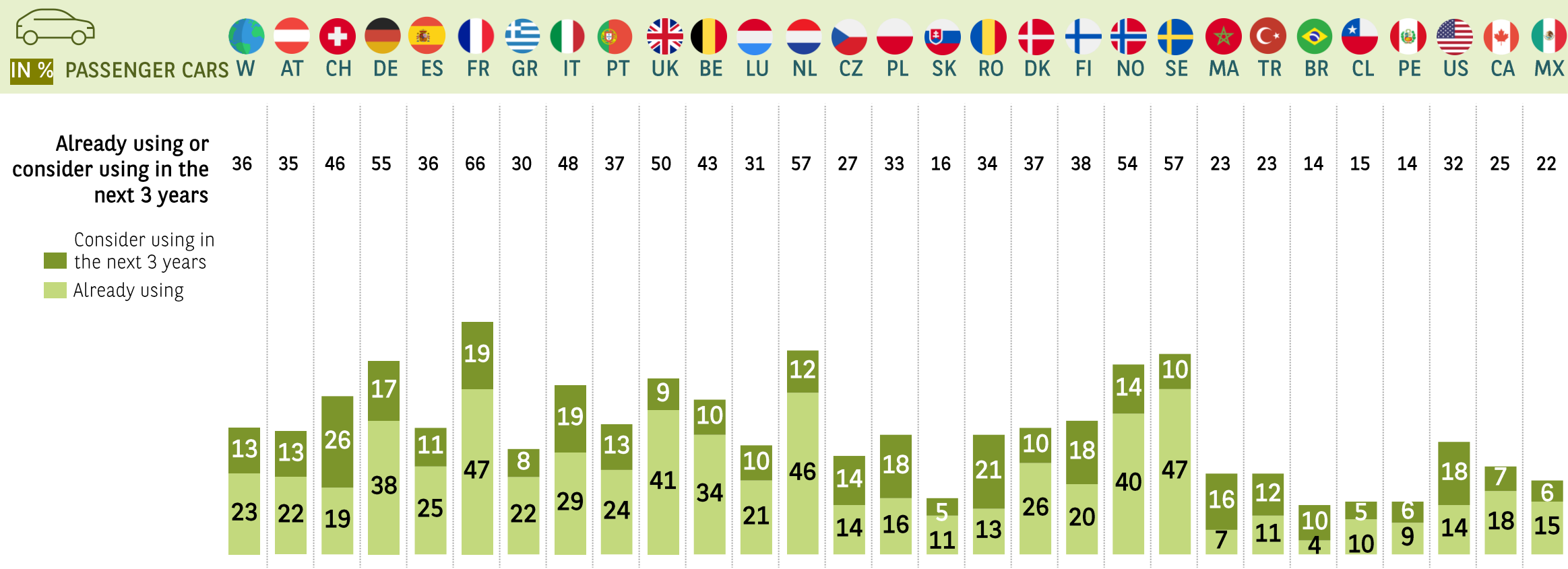
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

In Denmark in 2025, 37% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



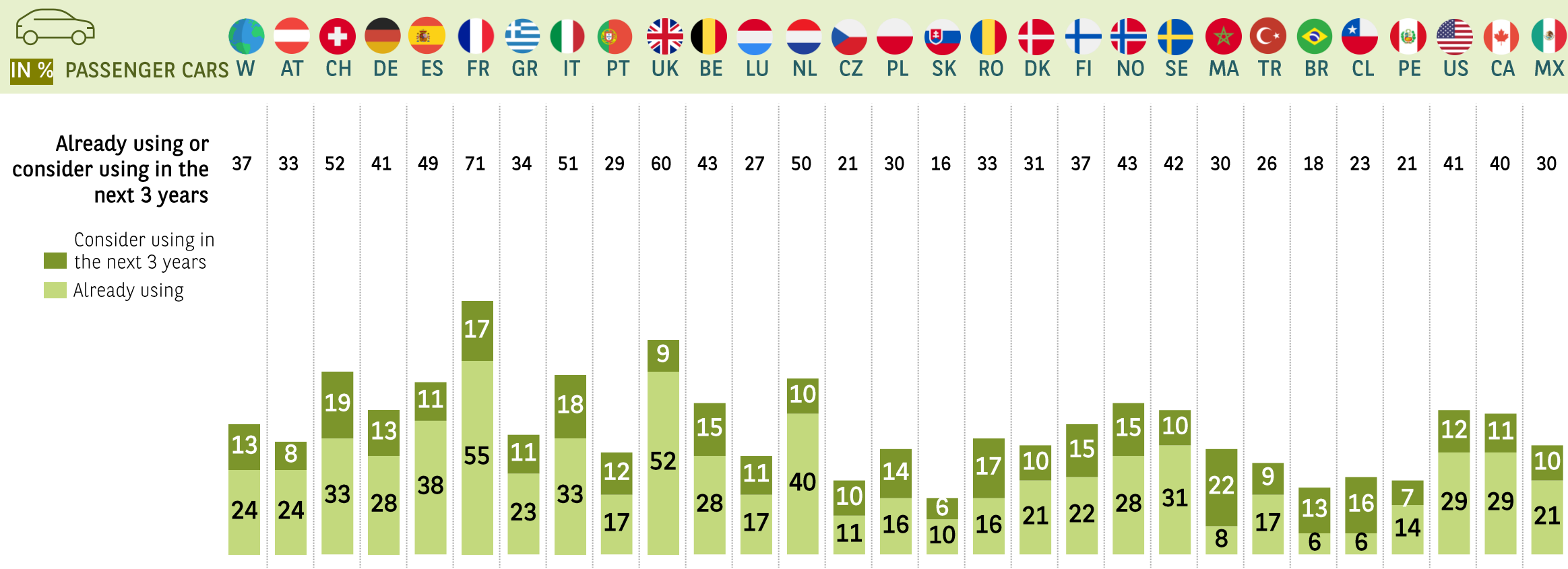
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON HEV

HOW TO READ THE RESULTS ?

In Denmark in 2025, 31% of the companies with passenger cars are already using HEV or are considering using it in the next three years.

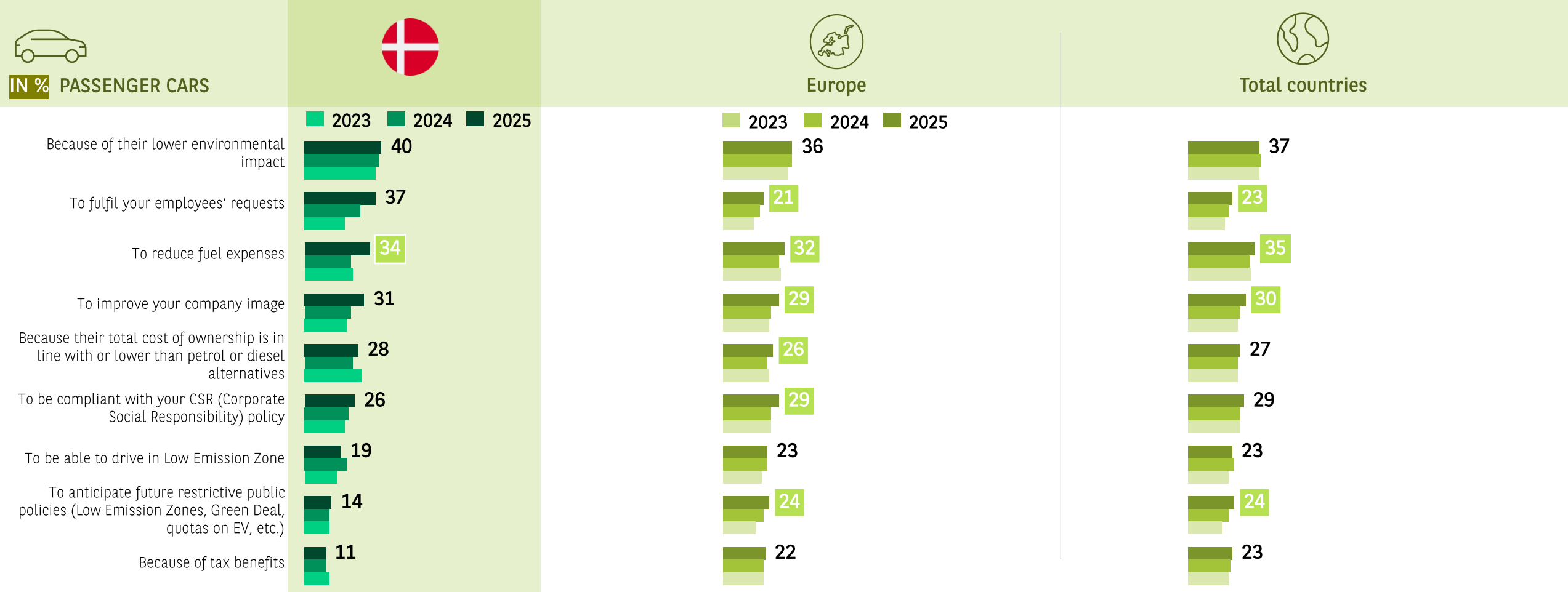


E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Denmark in 2025, 40% of the companies with passenger cars are already using alternative energy technologies or are considering it Because of their lower environmental impact.

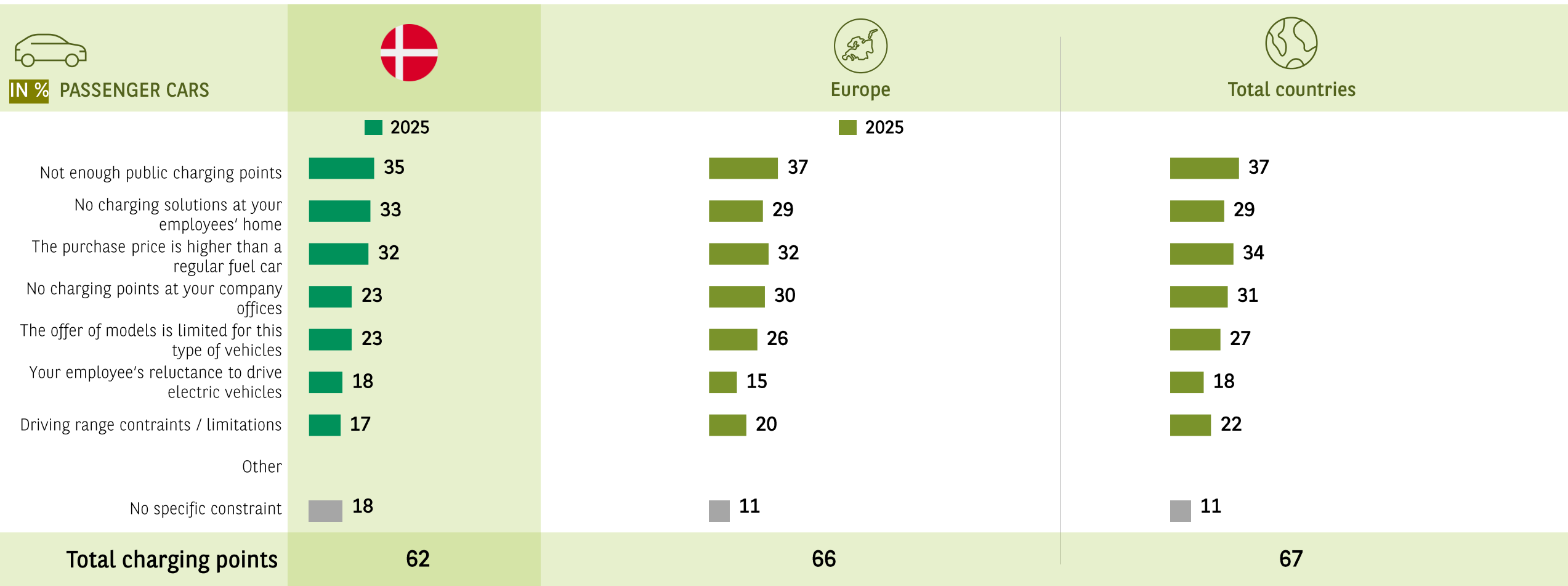


E28A. Why have you already implemented or why do you consider implementing these energy technologies?
Basis: companies that are already using or considering using alternative energy technologies for passenger cars

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Denmark in 2025, 35% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 62% of the companies mention at least one reason related to charging points.



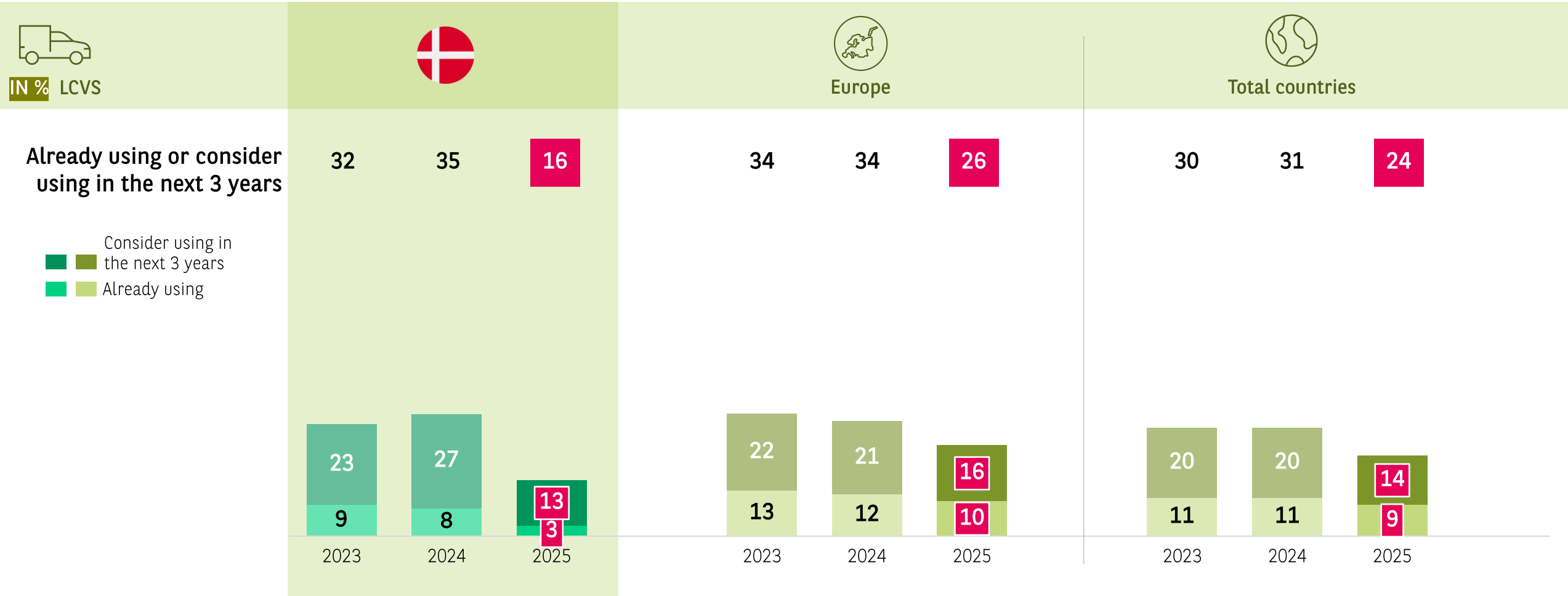
E28B_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with passenger cars and aware of EV technology

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 16% 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

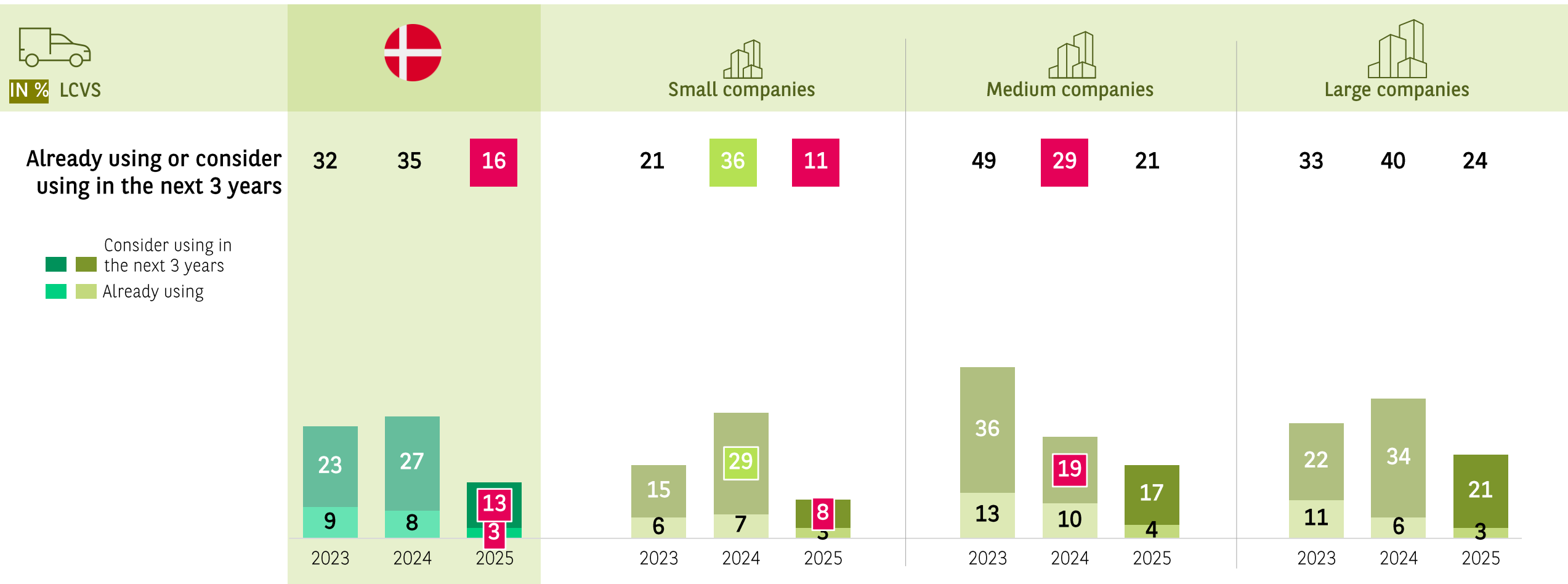
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 16% 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

X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

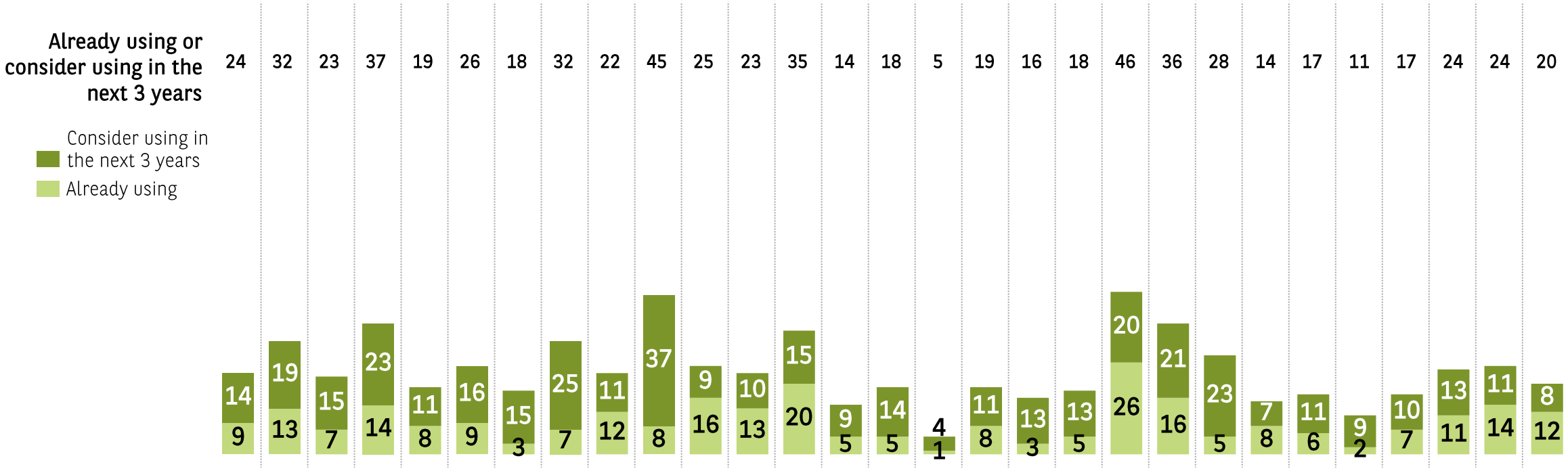
AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

In Denmark in 2025, 16% 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.



IN % LCVS



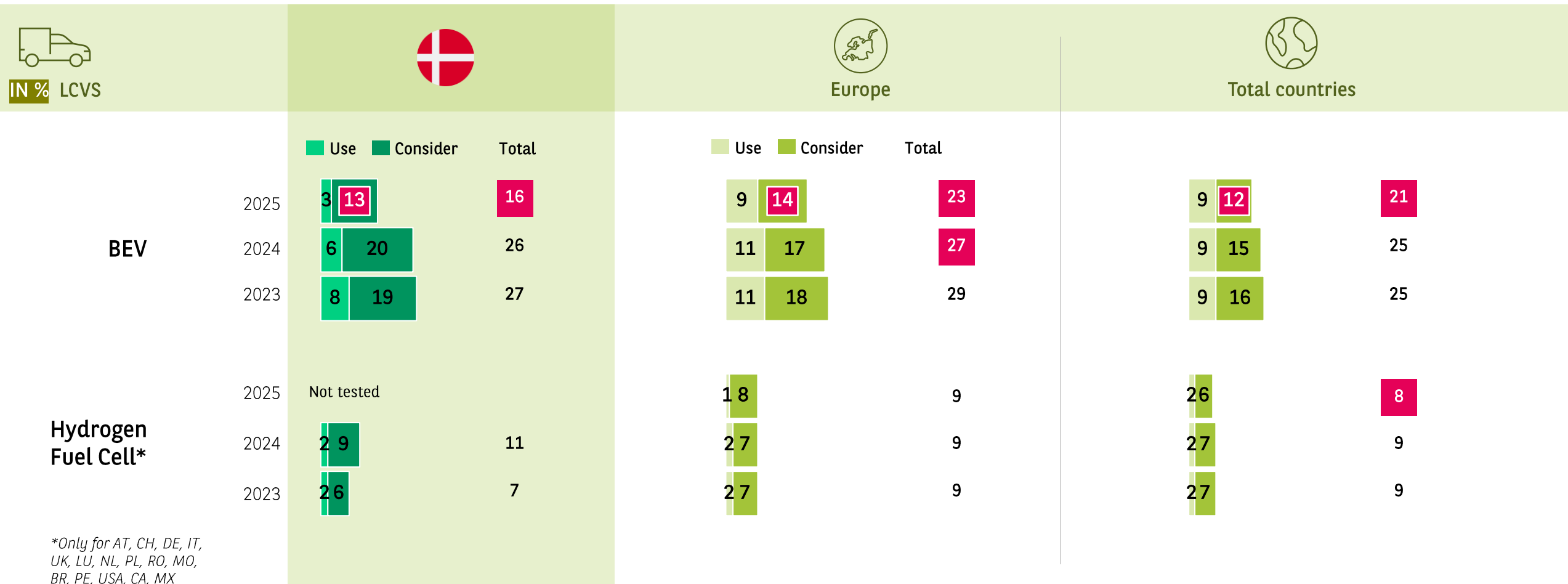
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Denmark in 2025, 16% 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 Denmark in 2025, 16% of the companies with LCVs are already using BEV or are considering using it in the next three years.

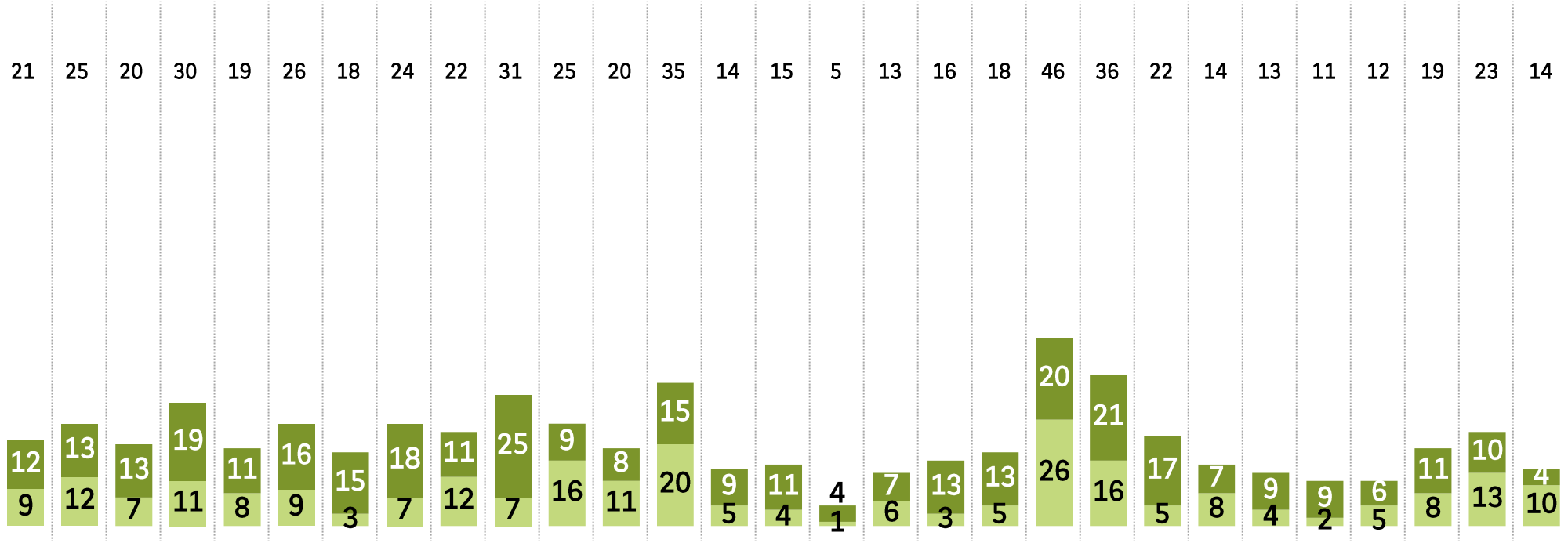


IN % LCVS



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



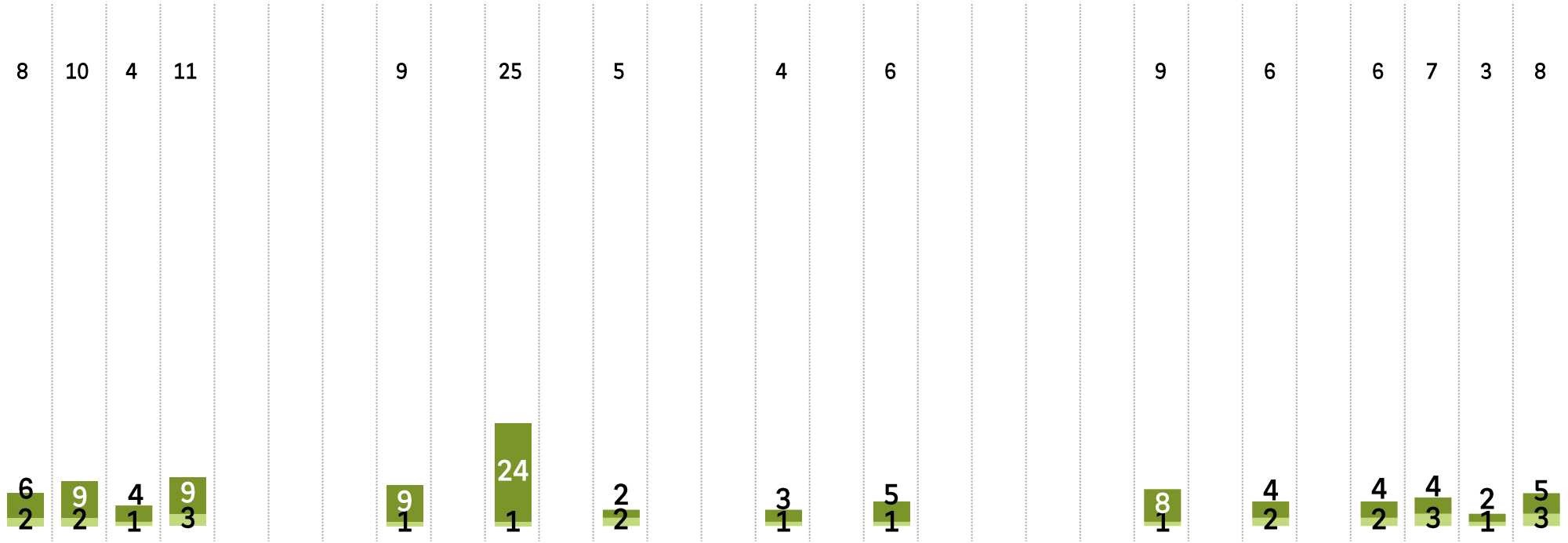
IN % LCVS

-  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

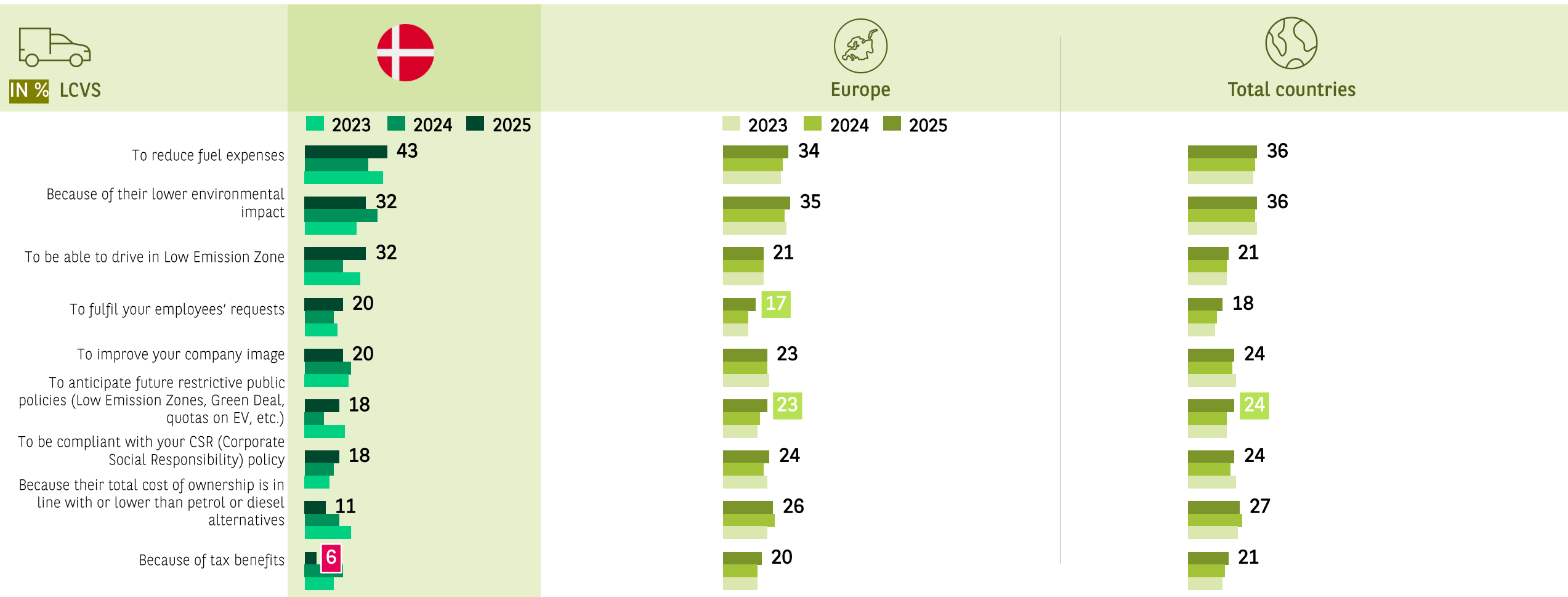


E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR LCVs

HOW TO READ THE RESULTS ?

In Denmark in 2025, 43% of the companies with LCVs are already using alternative energy technologies or are considering it To reduce fuel expenses.



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

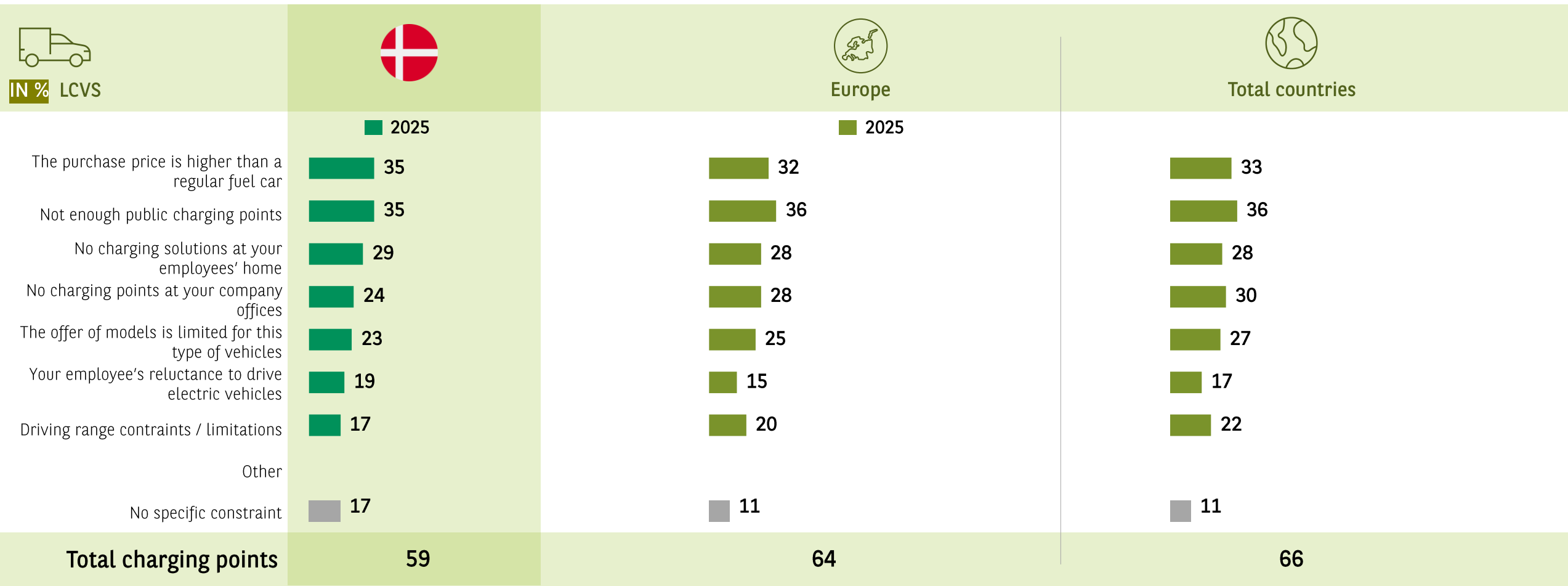
X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

New question

HOW TO READ THE RESULTS ?

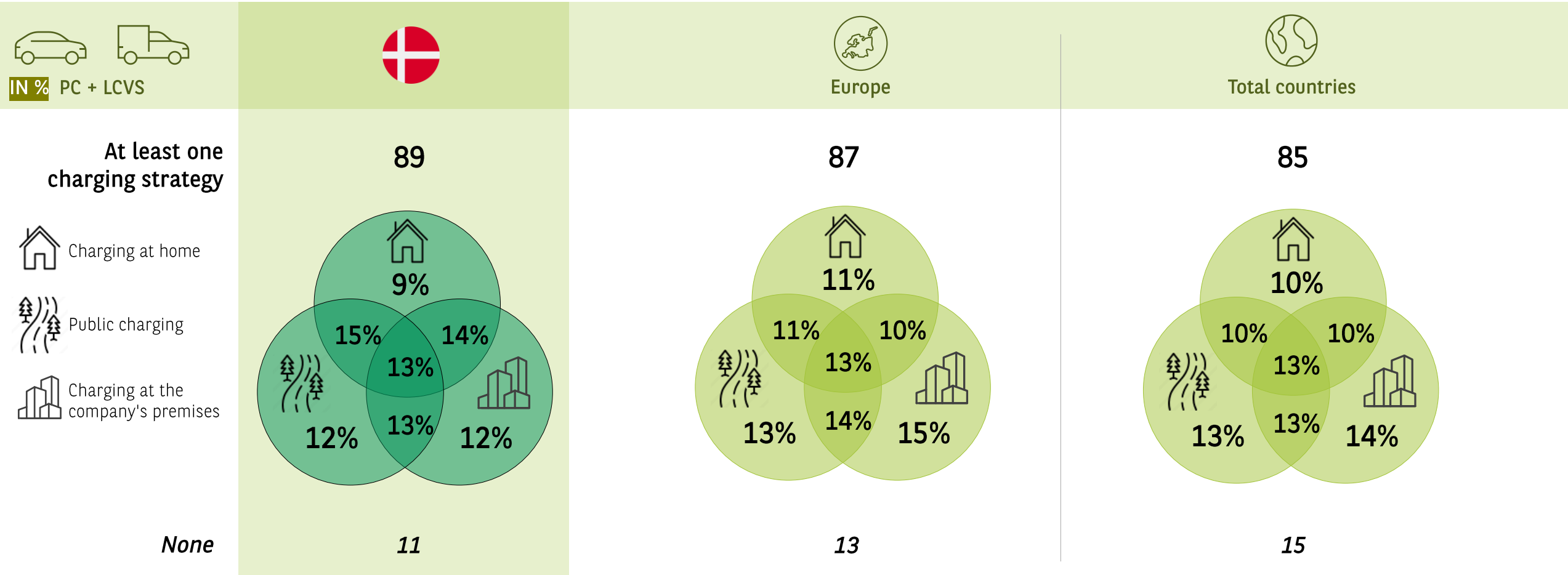
In Denmark in 2025, 35% of the companies with LCVs declare that the main constraint for using electric LCVs is: The purchase price is higher than a regular fuel car. And 59% of the companies mention at least one reason related to charging points.



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 ?

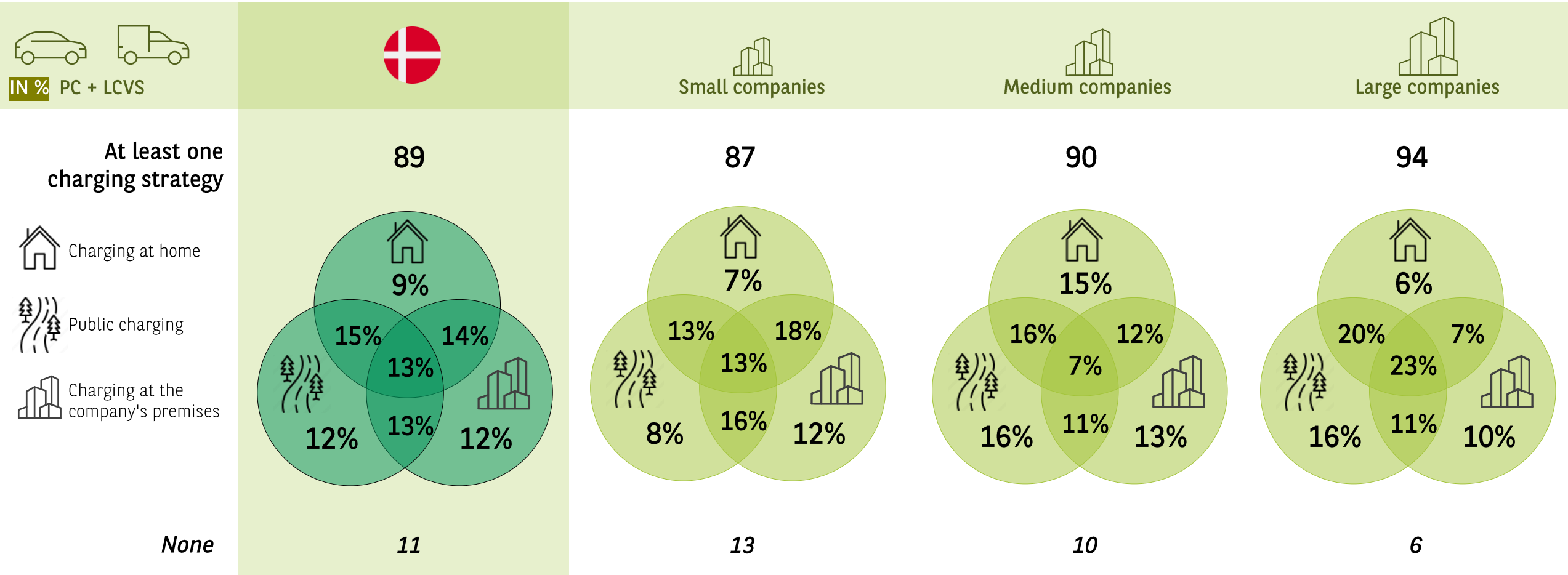
In Denmark in 2025, 89% of the companies have at least one charging strategy or will have one in the future.



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 ?

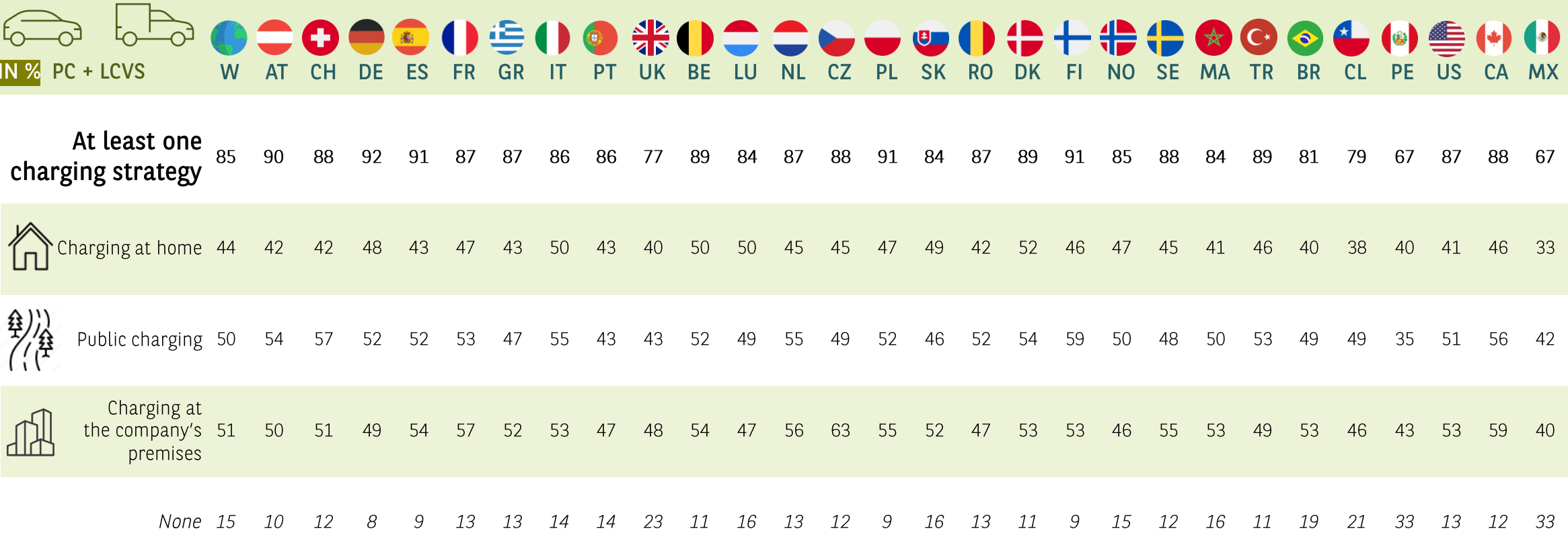
In Denmark in 2025, 89% of the companies have at least one charging strategy or will have in the future.



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In Denmark in 2025, 89% of the companies have at least one charging strategy or will have in the future.



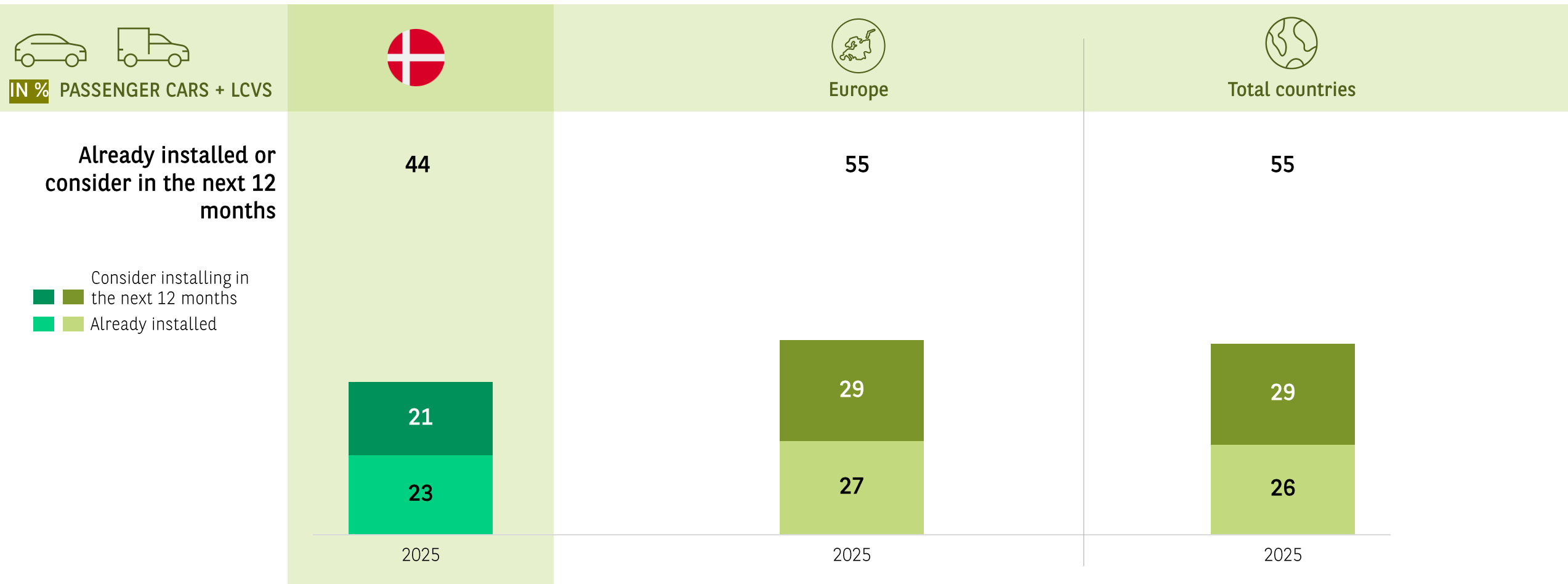
E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 44% 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.



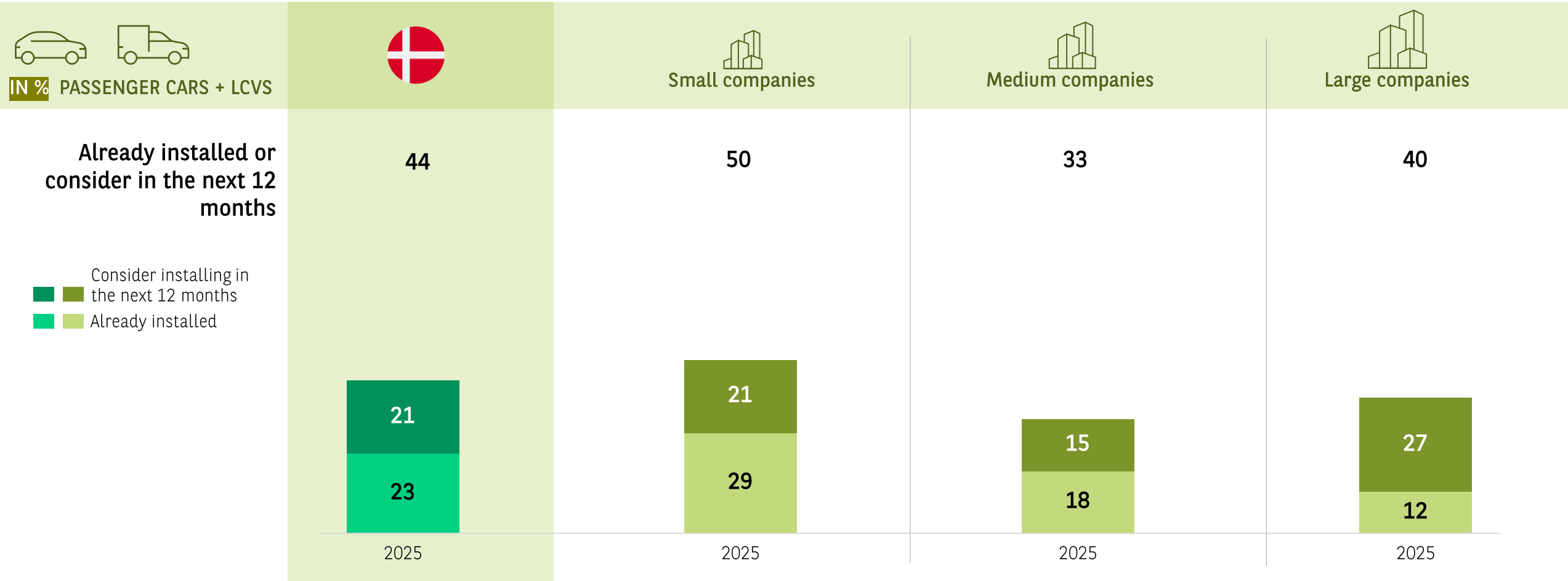
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 44% 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.



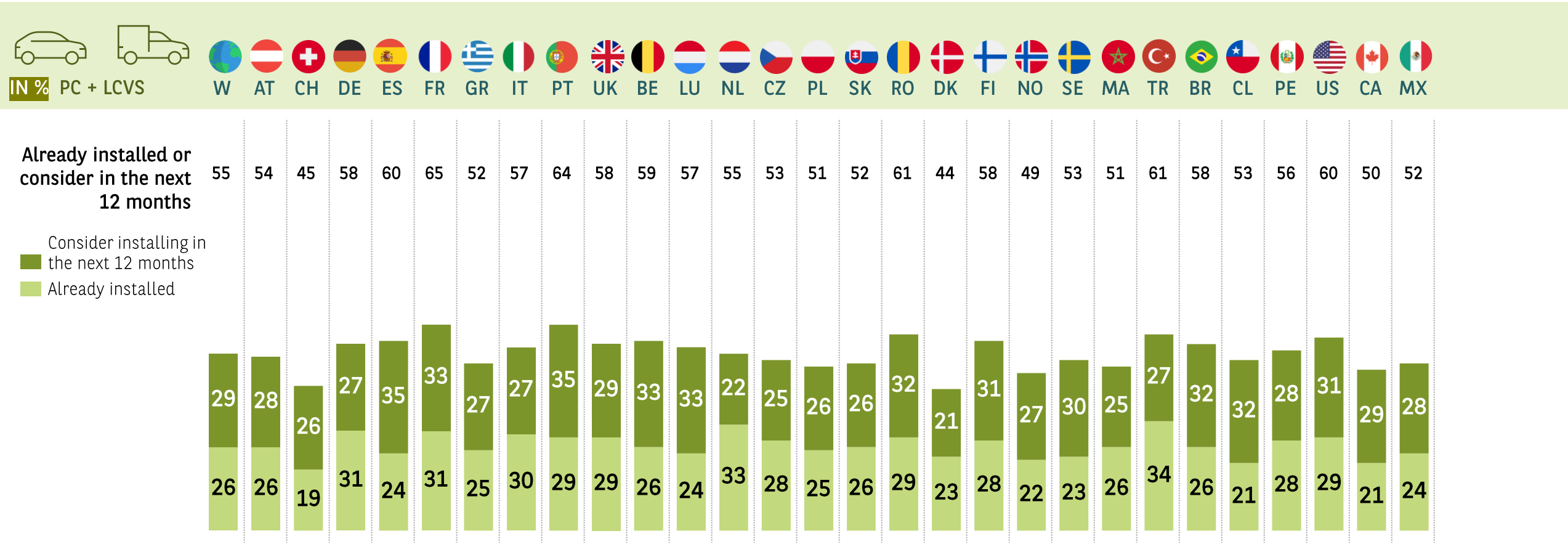
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

HOW TO READ THE RESULTS ?

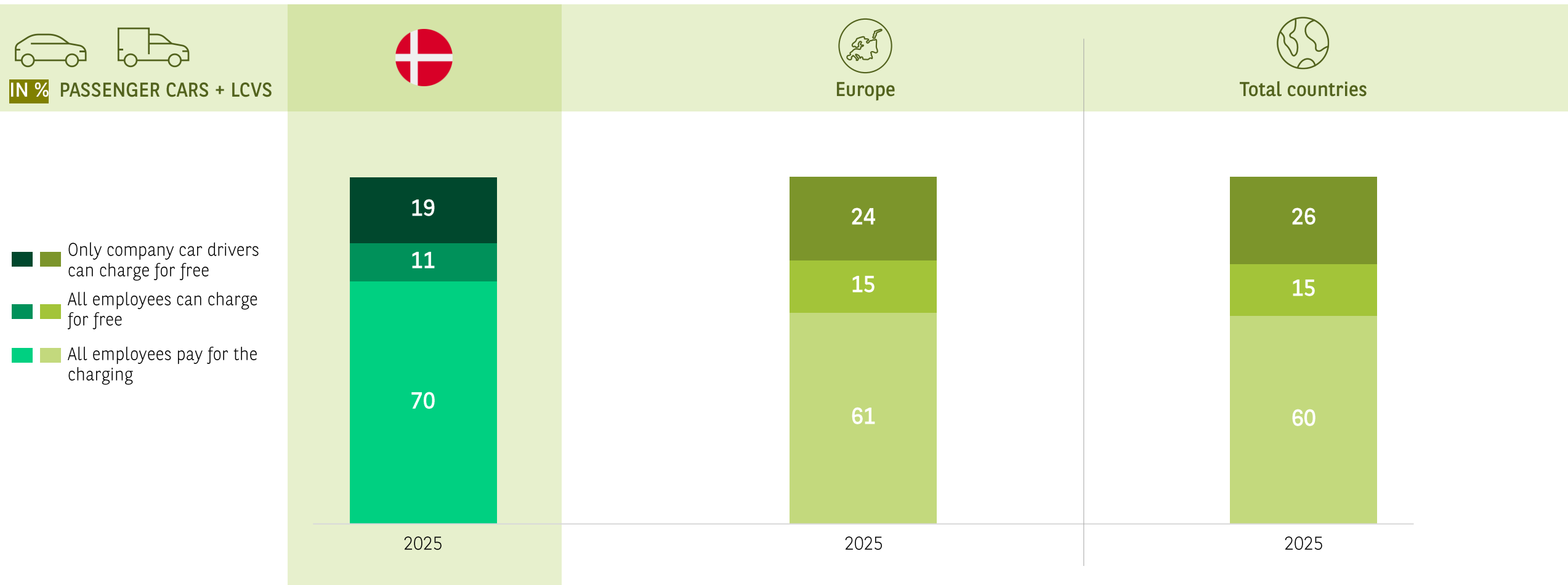
In Denmark in 2025, 44% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



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

HOW TO READ THE RESULTS ?

In Denmark in 2025, 19% 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.



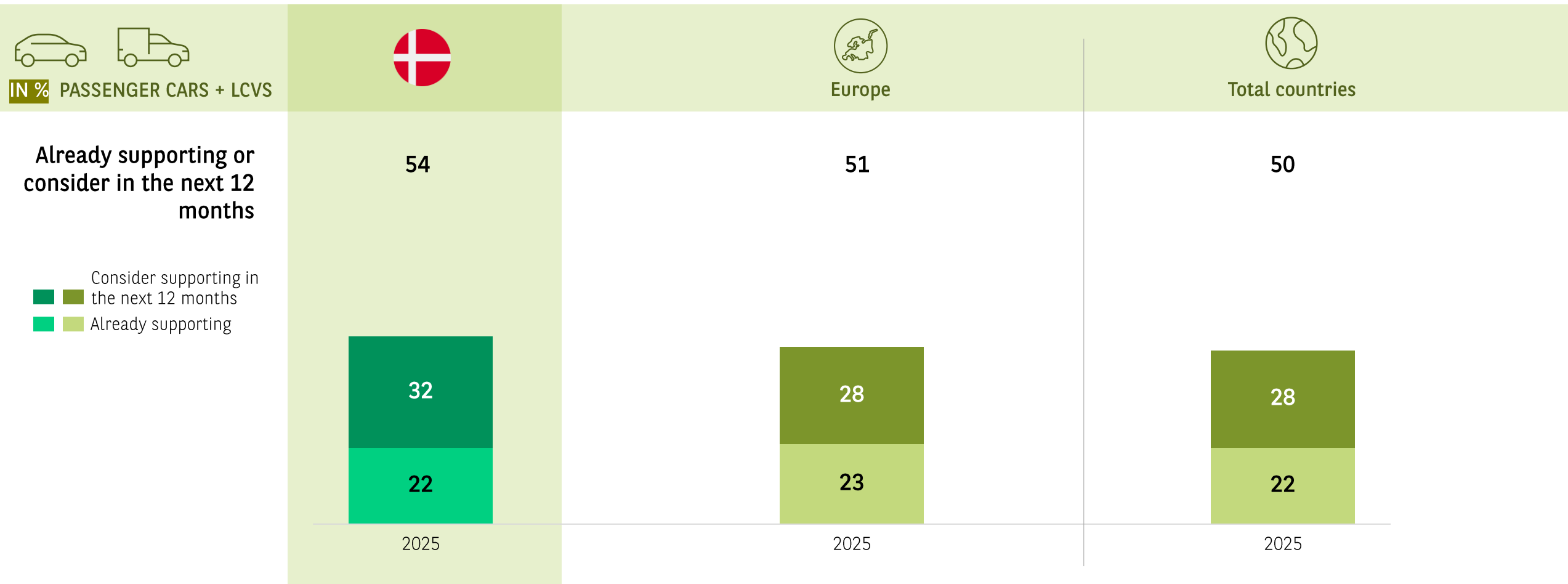
E33. How do you manage or plan to manage the cost of charging at company's premises?
Basis: companies that have already installed or are considering installing charging points on their premises

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 54% 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.



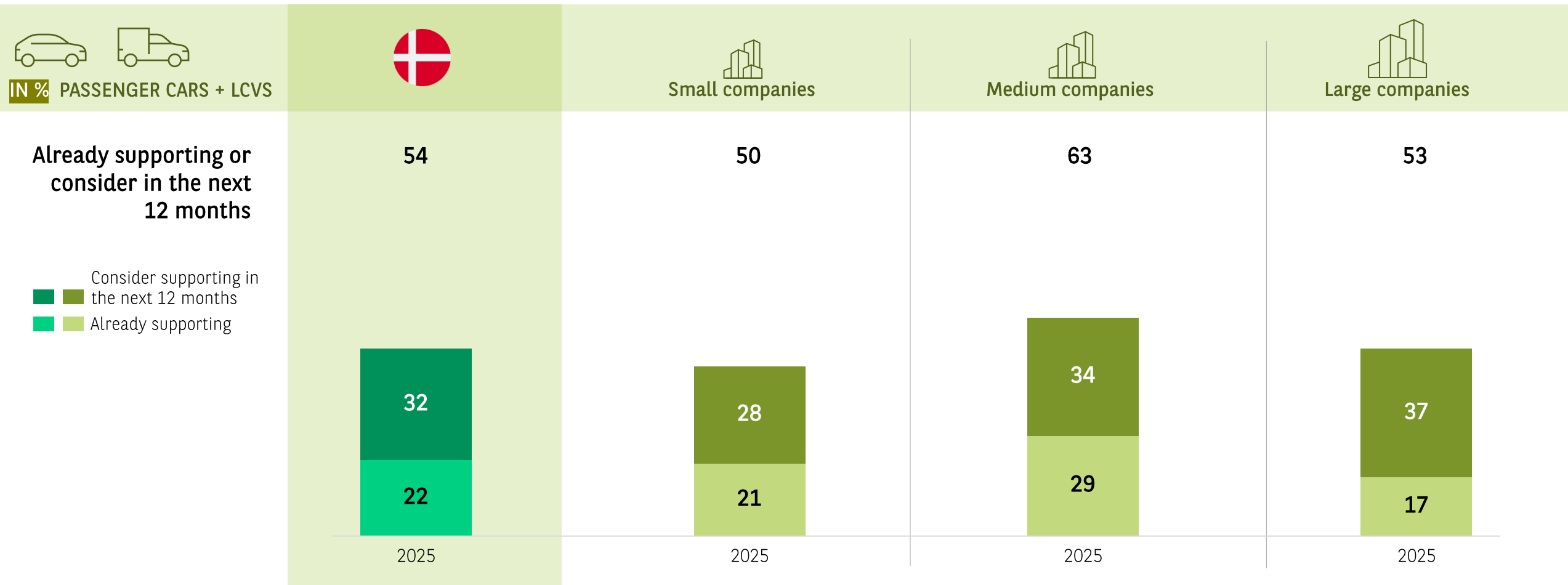
E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies using or considering home charging

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 54% 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.



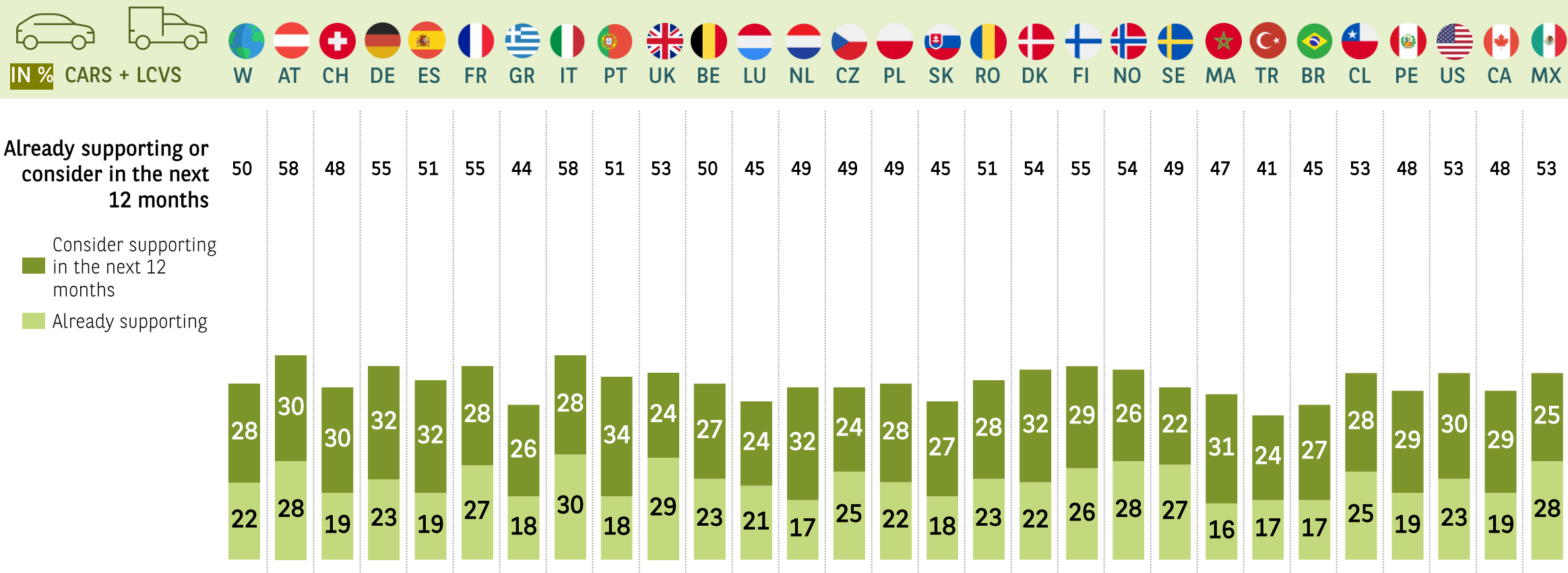
E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies with charging at home

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 54% 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.



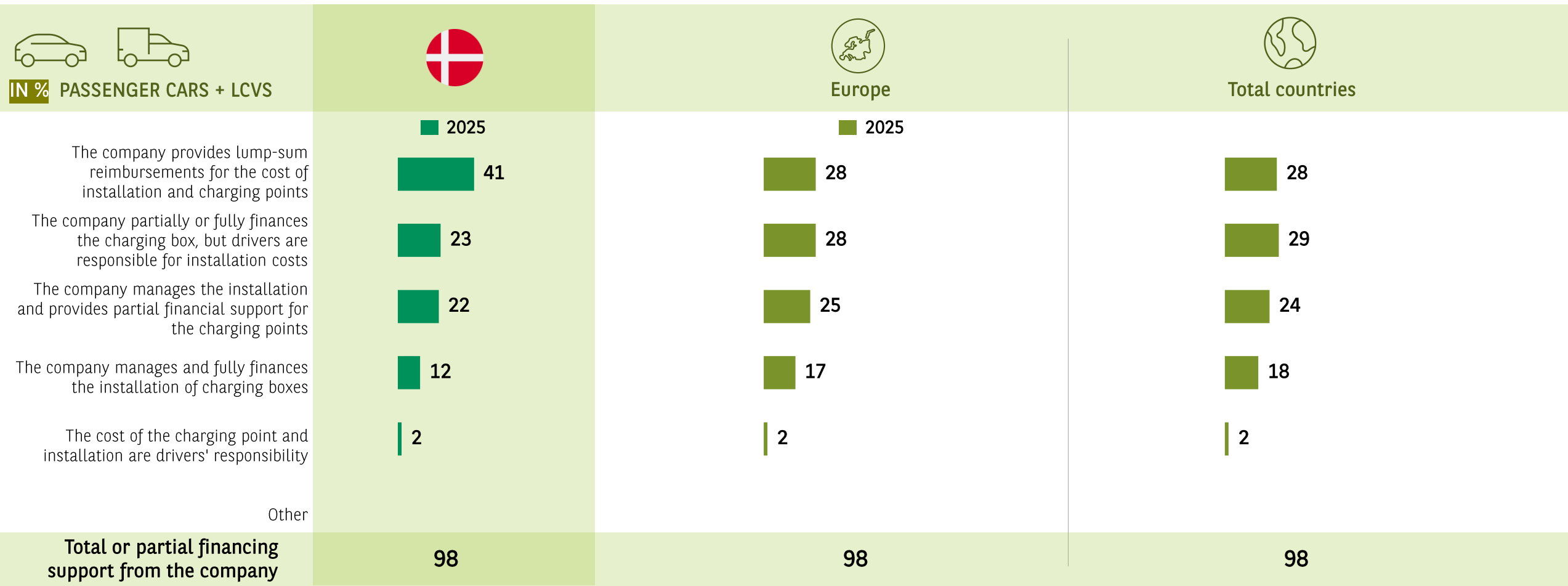
E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies with charging at home

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 41% of the companies that are already supporting or are considering supporting charging points installation at home have the following policy : "The company provides lump-sum reimbursements for the cost of installation and charging points"



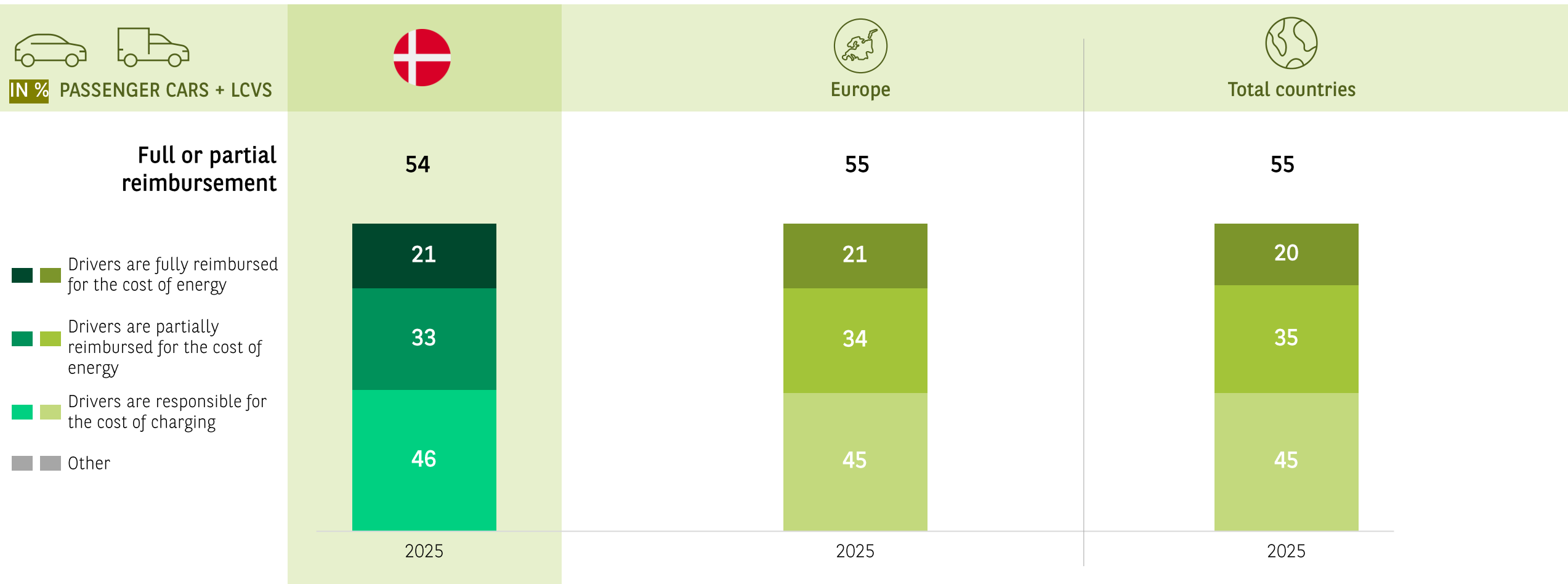
E35. Regarding home charging, how does your company currently support, or plan to support, its company car drivers with the installation of home charging points?
Basis: companies that are already supporting or are considering supporting charging points installation at home

SUPPORT OF ENERGY COST OF HOME CHARGING POINTS

New question

HOW TO READ THE RESULTS ?

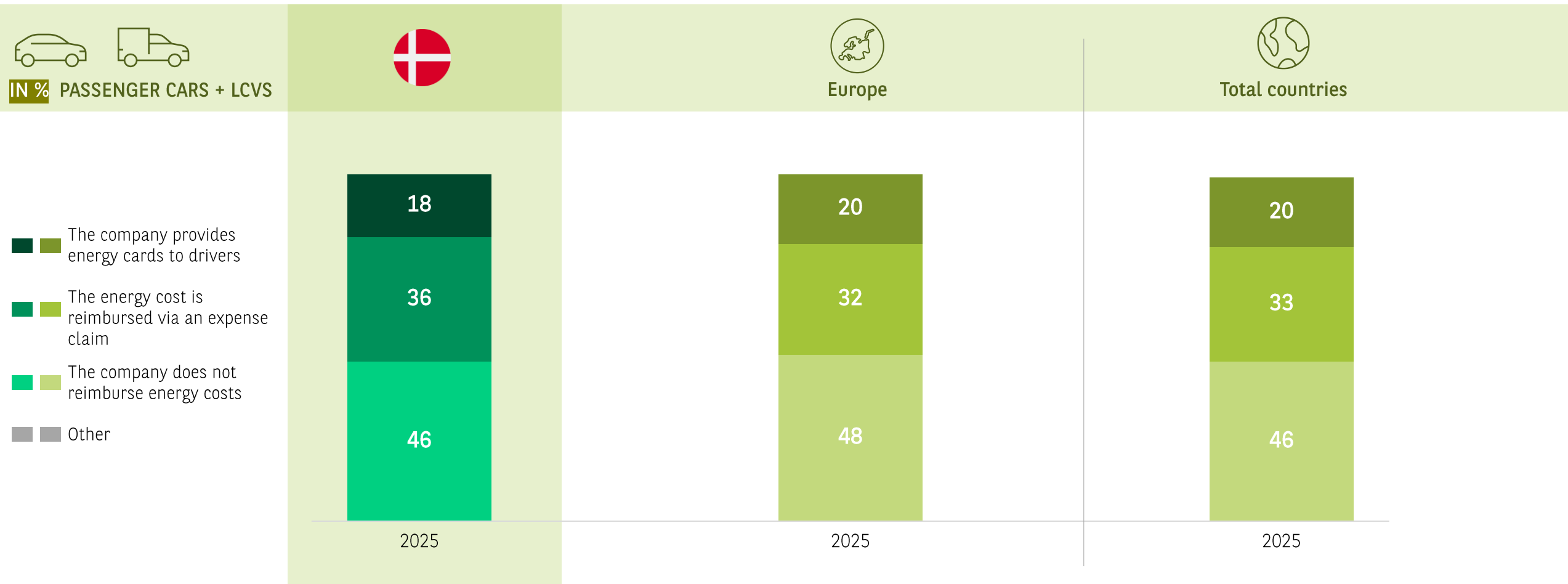
In Denmark in 2025, 21% of the companies that are already supporting or are considering supporting charging points installation at home fully reimburse drivers for the cost of energy, or plan doing so.



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 Denmark in 2025, 18% of the companies that are using or considering public charging provide energy cards to drivers.



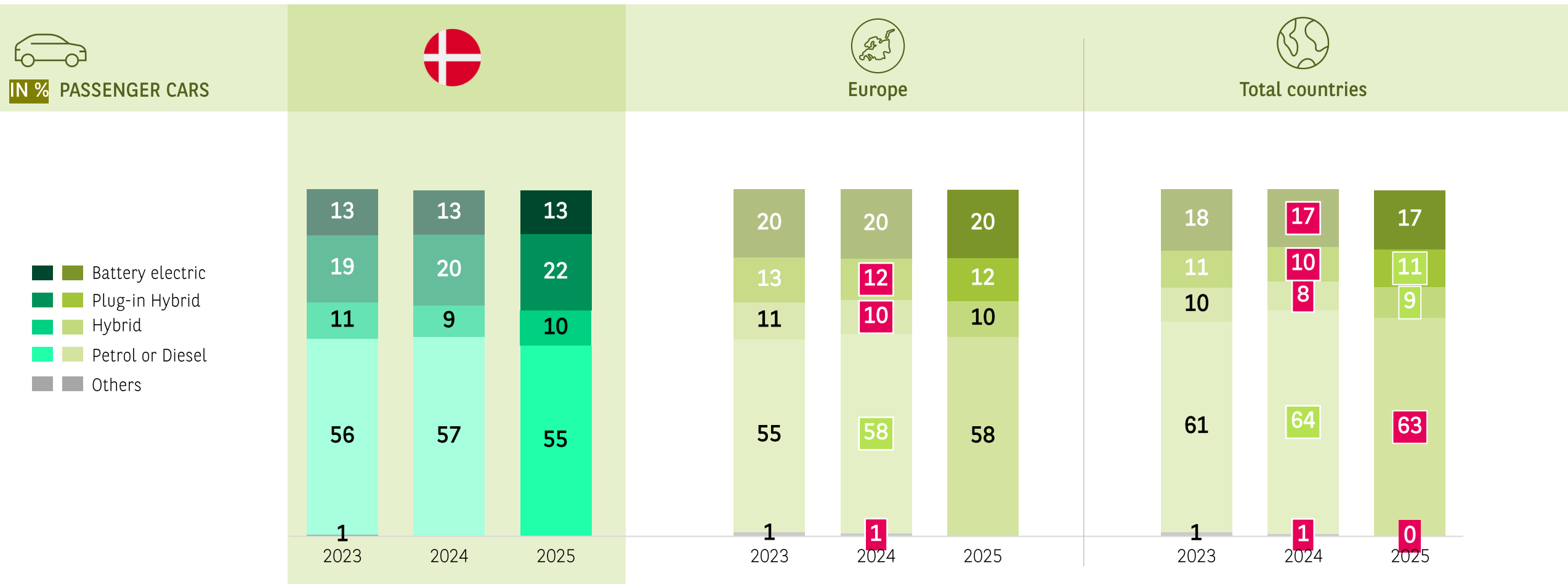
E37. Regarding public charging, how does your company manage or plan to manage the energy costs incurred by company car drivers?
Basis: companies using or considering public charging

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 13% 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

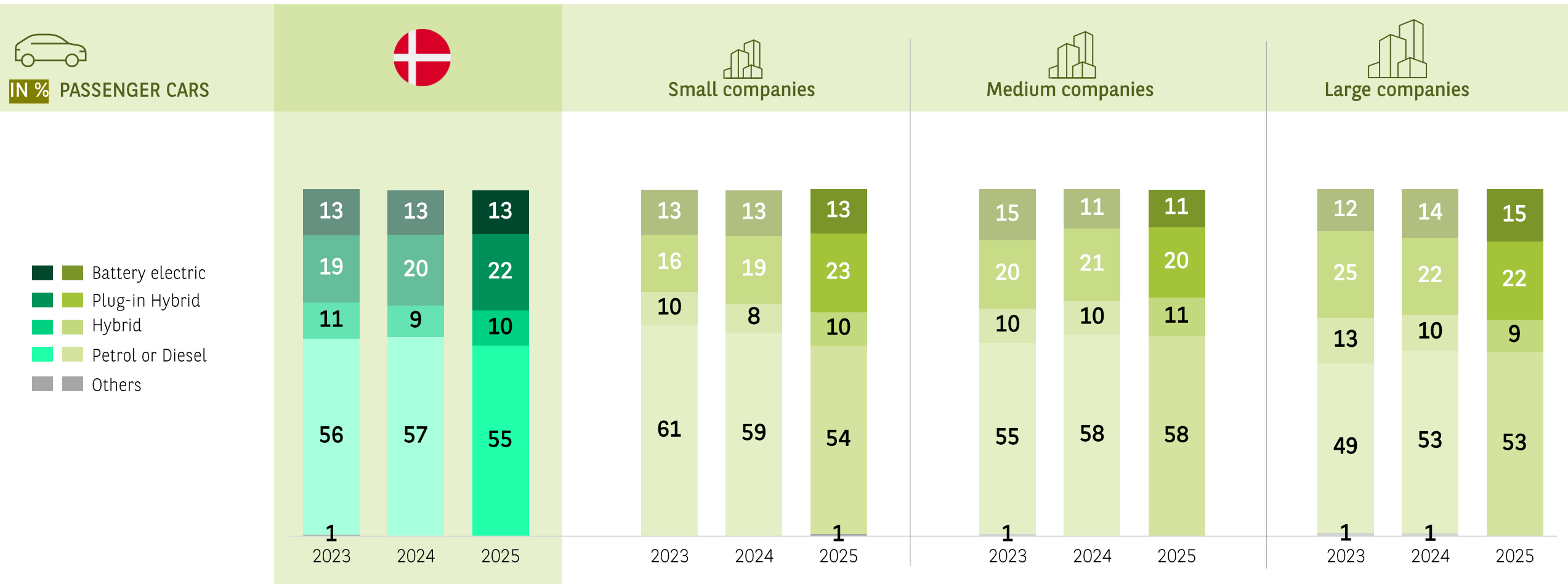
X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

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Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

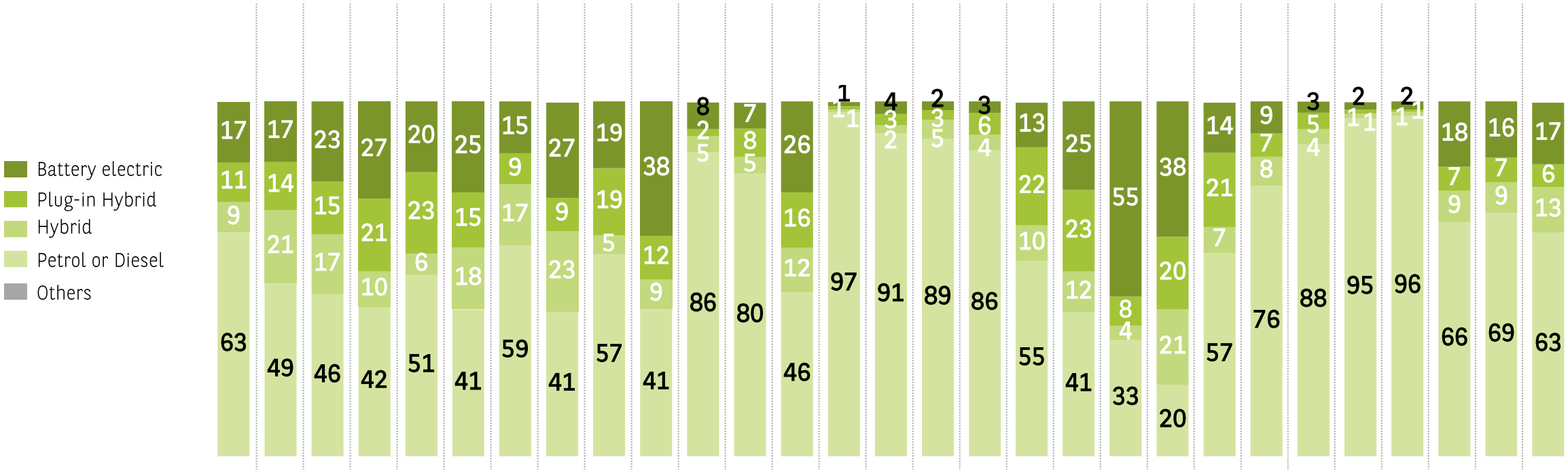
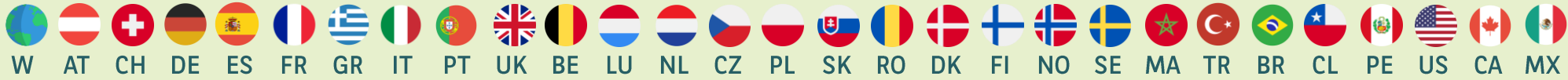
FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 13% of the passenger car fleet is expected to be BEV.



IN % CARS



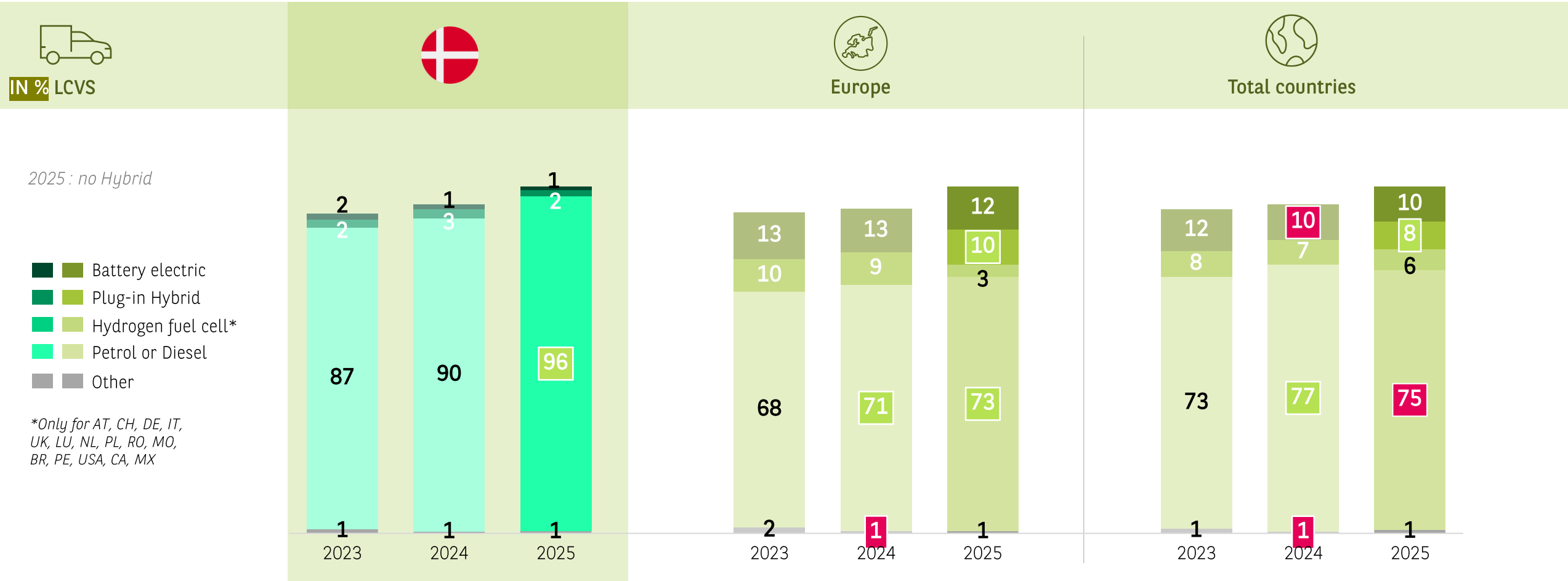
A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 1% 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

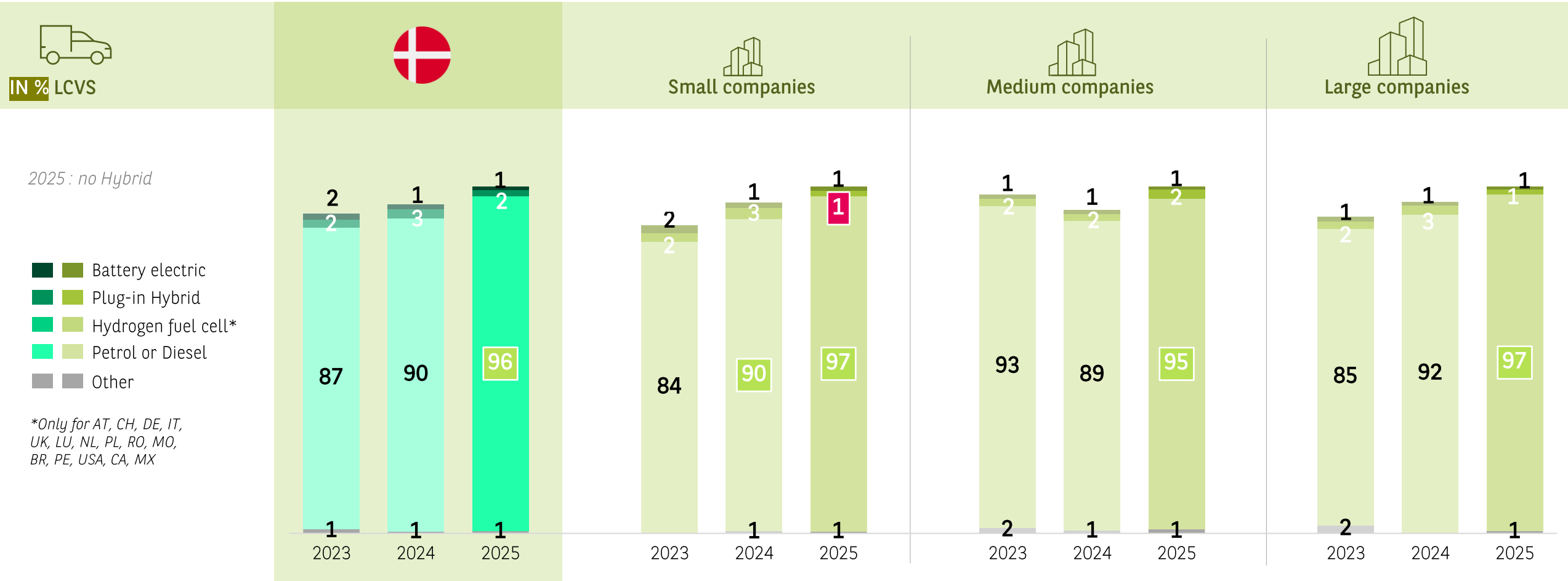
X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 1% 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

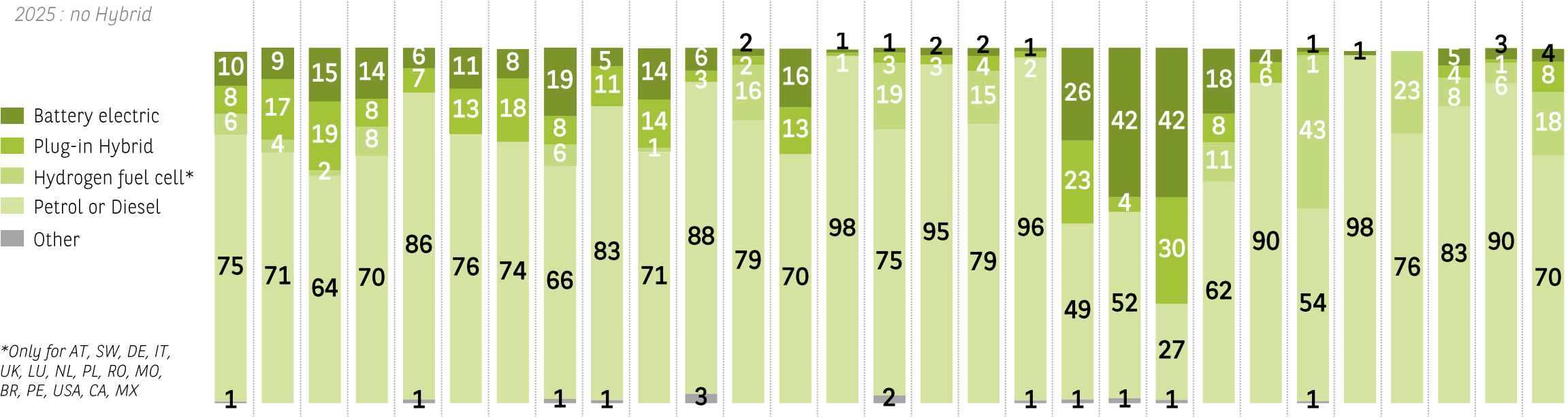
X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 1% of the LCV fleet is expected to be BEV.



*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 Danish fleets in 2025

43% of Danish companies have adopted connected vehicles, vs 38% for the European average.

25% have connected passenger cars and 25% have connected LCVs, both figures remaining stable compared to 2024.

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

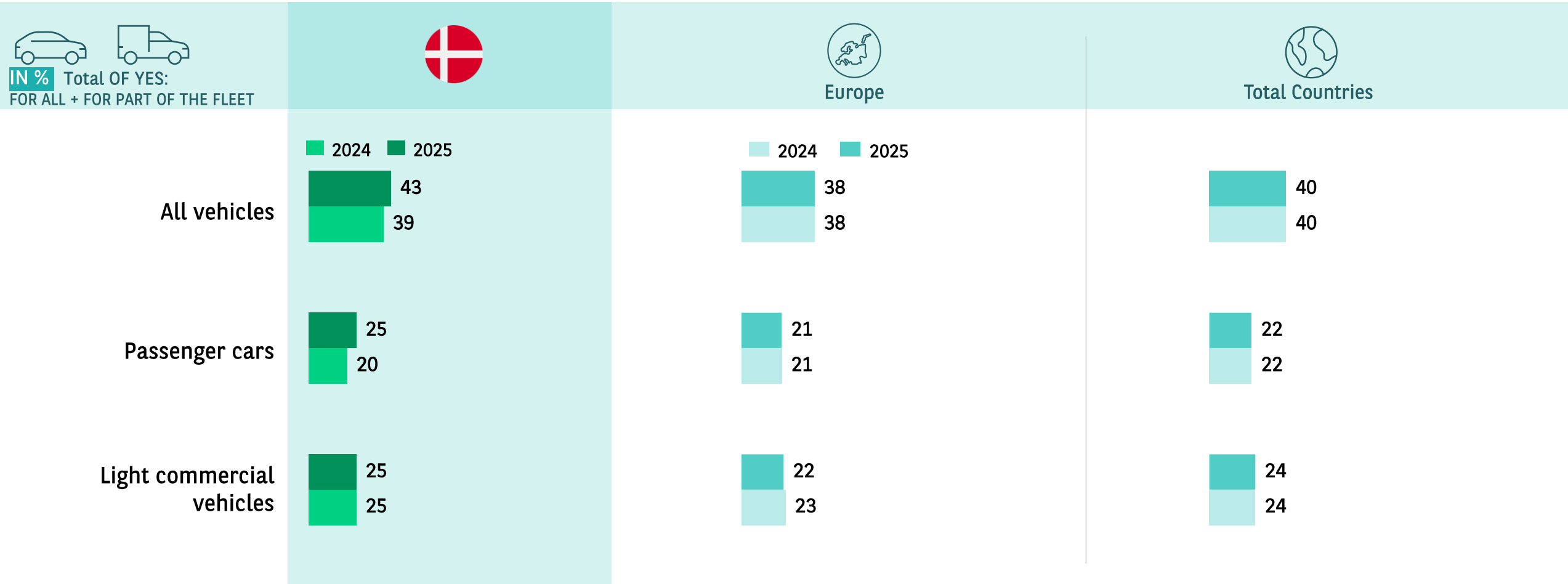
Telematics data usage remains low at **11%**, consistent across company sizes.

But interest in leveraging this data is high, with **51%** of companies considering its use.

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Denmark, in 2025, 43% of the companies have connected vehicles for all or part of their fleet.
25% have connected passenger cars and 25% have connected LCVs.



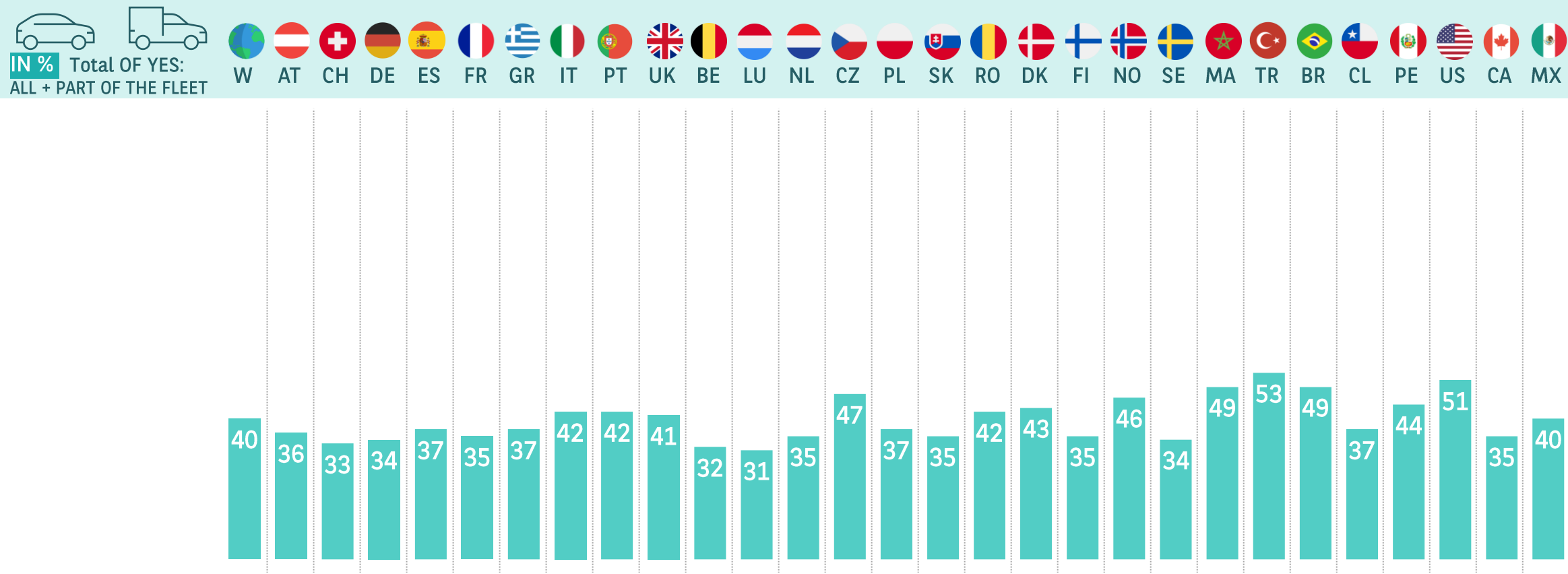
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Denmark, in 2025, 43% of the companies have connected vehicles for all or part of their fleet.

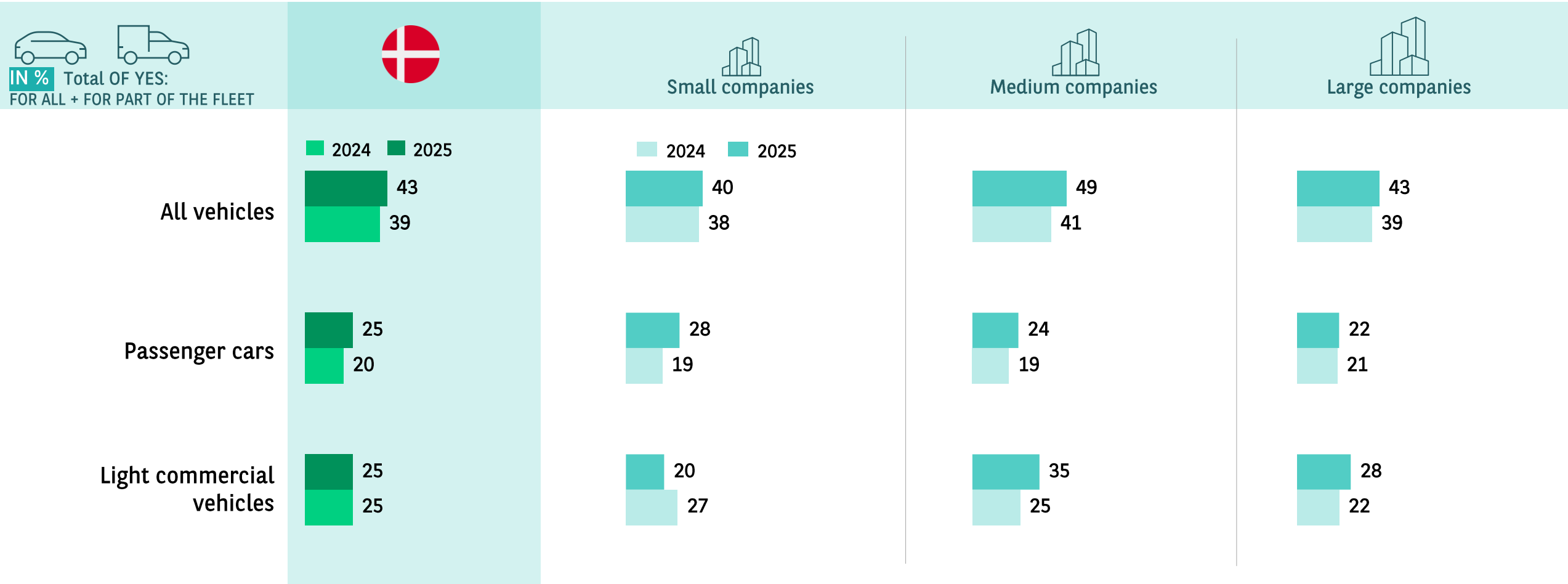


E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Denmark, in 2025, 43% of the companies have connected vehicles for all or part of their fleet.
25% have connected passenger cars and 25% 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 DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Denmark in 2025, 61% 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	11	51	61	14	47	60	15	47	62
	2024	17	48	64	15	45	60	16	45	61
Passenger cars	2025	10	40	50	13	42	55	14	43	57
	2024	18	33	51	16	40	56	16	41	57
Light Commercial Vehicles	2025	10	52	62	13	47	59	14	46	60
	2024	14	52	66	13	46	59	14	46	60

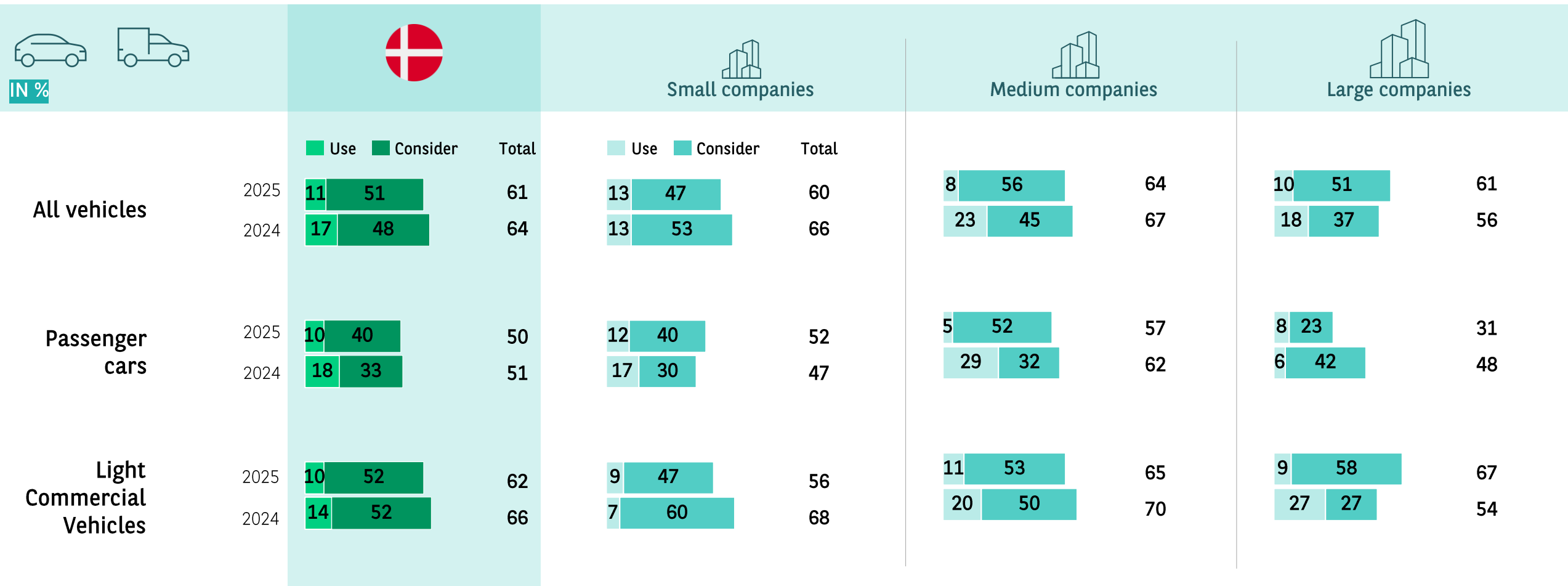
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Denmark in 2025, 61% 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.



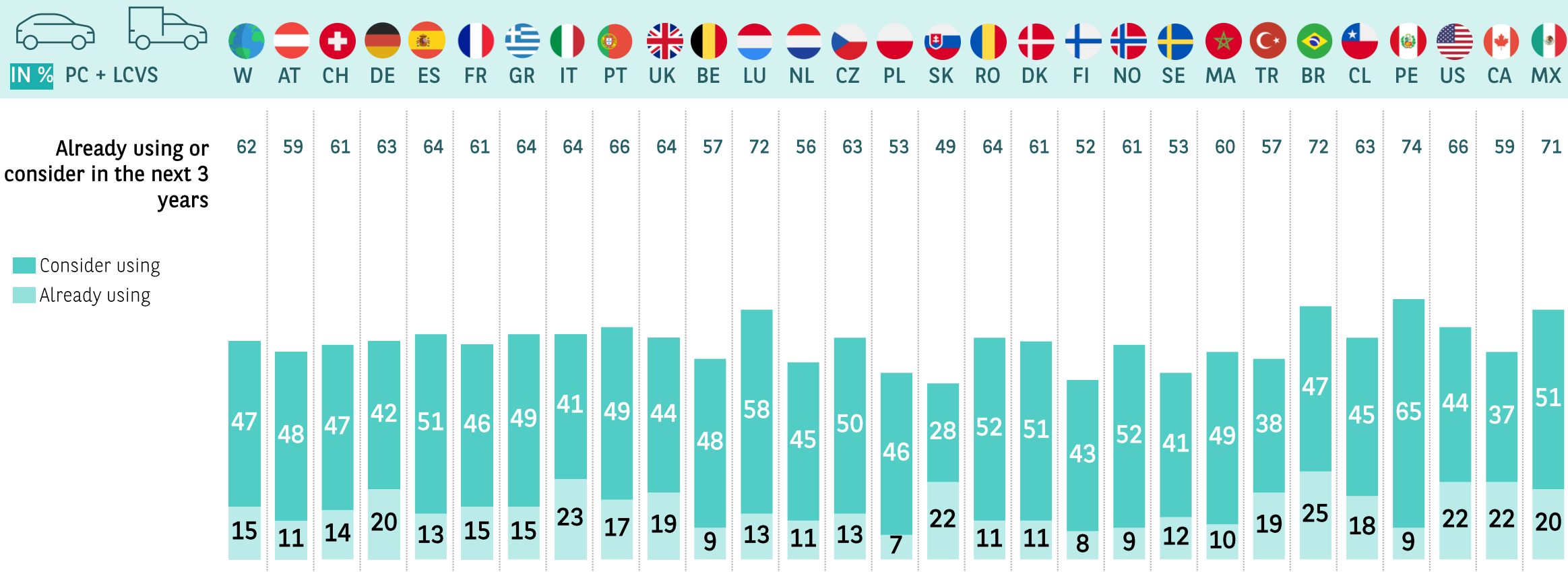
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Denmark in 2025, 61% 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 Danish companies for 2025

76% of companies have implemented at least one mobility policy or are considering doing so and **63%** of companies have implemented at least one mobility solution or are considering doing so.

Danish companies are aligned with the European benchmark for policies (76% vs 77%) and for solutions (63% vs 58%).

Two mobility policies are standing out: car or cash allowance and public transport reimbursement

34% of Danish companies propose car or cash allowance or consider doing so and **28%** offer short or mid-term rental vehicles or consider doing so.

A card and an App provided by the company to pay multiple mobility solution (27% and 21%) are the most implemented or considered solutions.

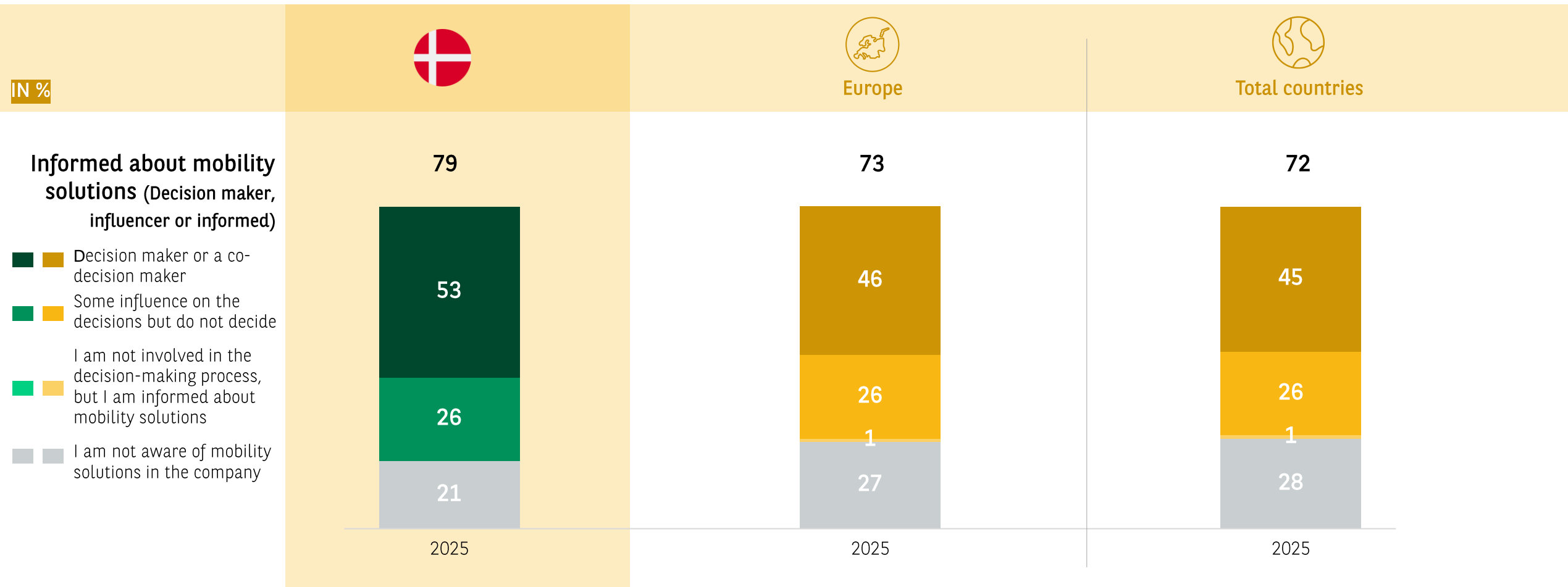
Mobility policies and solutions implementation remains motivated by HR-related needs and corporate CSR policies

HR-related needs, such as talent acquisition and employee retention (**46%** of the companies with policies and **43%** with solutions) and compliance to CSR policies (**43%** of the companies with policies and **40%** with solutions) are primary drivers for implementing mobility options for employees.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

In Denmark in 2025, 79% 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 Denmark in 2025, 29% 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>56</div><div>20</div></div> 76	<div><div>58</div><div>19</div></div> 77			<div><div>56</div><div>21</div></div> 79		
Public transport expense reimbursement	<div><div>19</div><div>10</div></div> 29	<div><div>21</div><div>11</div></div> 33			<div><div>20</div><div>13</div></div> 33		
Personal vehicle expense reimbursement	<div><div>6</div><div>7</div></div> 12	<div><div>8</div><div>8</div></div> 16			<div><div>8</div><div>10</div></div> 18		
Mobility Budget	<div><div>16</div><div>10</div></div> 26	<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>5</div></div> 11	<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>15</div><div>13</div></div> 28	<div><div>18</div><div>10</div></div> 28			<div><div>17</div><div>12</div></div> 29		
Car or cash allowance	<div><div>18</div><div>16</div></div> 34	<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 Denmark in 2025, 29% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

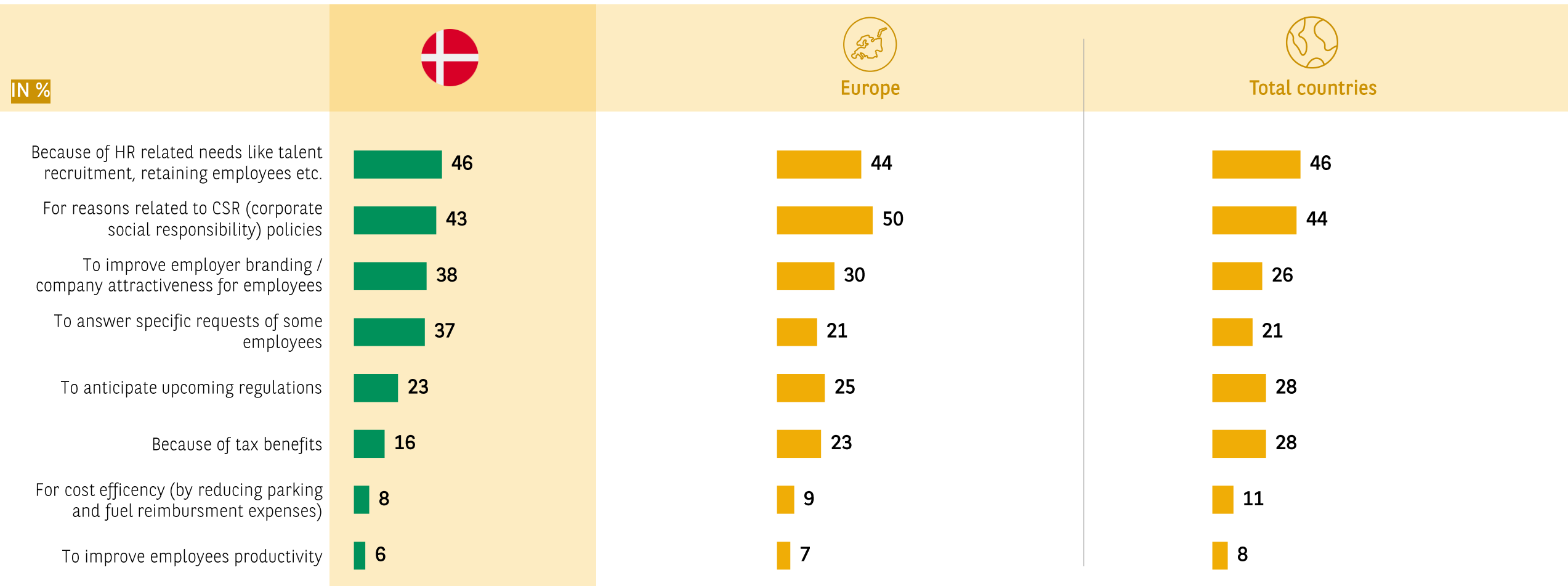
						 Europe			 Total countries		
			IN %								
			2023	2024	2025	2023	2024	2025	2023	2024	2025
New item	Public transport expense reimbursement	Use			19			21			20
		Total			29			33			33
New item	Personal vehicle expense reimbursement	Use			6			8			8
		Total			12			16			18
	Mobility Budget	Use	16	15	16	15	15	16	16	15	16
		Total	24	22	26	26	26	28	28	28	29
	Private lease or salary sacrifice	Use	12	19	6	14	15	6	13	13	6
		Total	16	27	11	24	24	13	24	24	15
	A short or mid term rental vehicle	Use	13	17	15	19	19	18	18	17	17
		Total	21	26	28	28	28	28	28	27	29
	Car or cash allowance	Use	19	18	18	16	17	18	17	17	17
		Total	28	30	34	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 Denmark in 2025, 46% of the companies declare that the main reason for introducing mobility policies is: Because of HR related needs like talent recruitment, retaining employees etc..






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 Denmark in 2025, 22% 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	
At least one mobility solution	<div><div>35</div><div>28</div></div> 63	<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>8</div></div> 22	<div><div>13</div><div>10</div></div> 23	<div><div>12</div><div>11</div></div> 23
Ride sharing	<div><div>10</div><div>9</div></div> 19	<div><div>7</div><div>9</div></div> 16	<div><div>7</div><div>11</div></div> 18
Bike Leasing	<div><div>46</div></div> 10	<div><div>47</div></div> 11	<div><div>48</div></div> 12
Bike Sharing	<div><div>7</div><div>8</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>63</div></div> 9	<div><div>46</div></div> 11	<div><div>48</div></div> 12
An app provided by the company to book multiple mobility solutions	<div><div>7</div><div>14</div></div> 21	<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>10</div><div>17</div></div> 27	<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 Denmark in 2025, 22% of the companies are already using Car sharing or are considering doing so in the next 3 years.

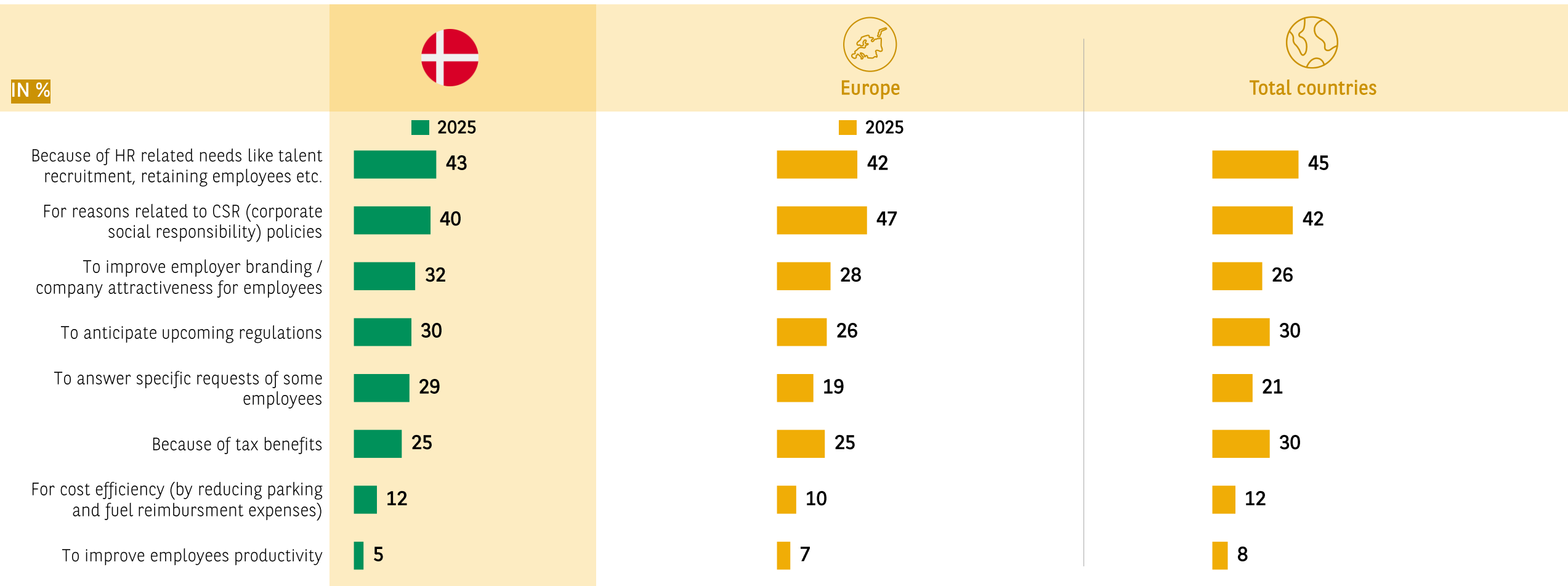
						 Europe			 Total countries		
			2023	2024	2025	2023	2024	2025	2023	2024	2025
			IN %								
Change of definition	Car sharing	Use			15			13			12
		Total			22			23			23
Change of definition	Ride sharing or car pooling	Use			10			7			7
		Total			19			16			18
New item	Bike Leasing	Use			4			4			4
		Total			10			11			12
New item	Bike Sharing	Use			7			5			5
		Total			15			14			15
New item	Scooter and moto leasing	Use			6			4			4
		Total			9			11			12
	An app provided by the company to book multiple mobility solutions	Use	9	6	7	10	10	11	11	10	11
		Total	20	17	21	20	20	21	22	21	23
New item	A card provided by the company to pay multiple mobility solution	Use			10			8			7
		Total			27			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 Denmark in 2025, 43% of the companies declare that the main reason for introducing mobility solutions is: Because of HR related needs like talent recruitment, retaining employees etc..



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 Denmark in 2025, 29% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

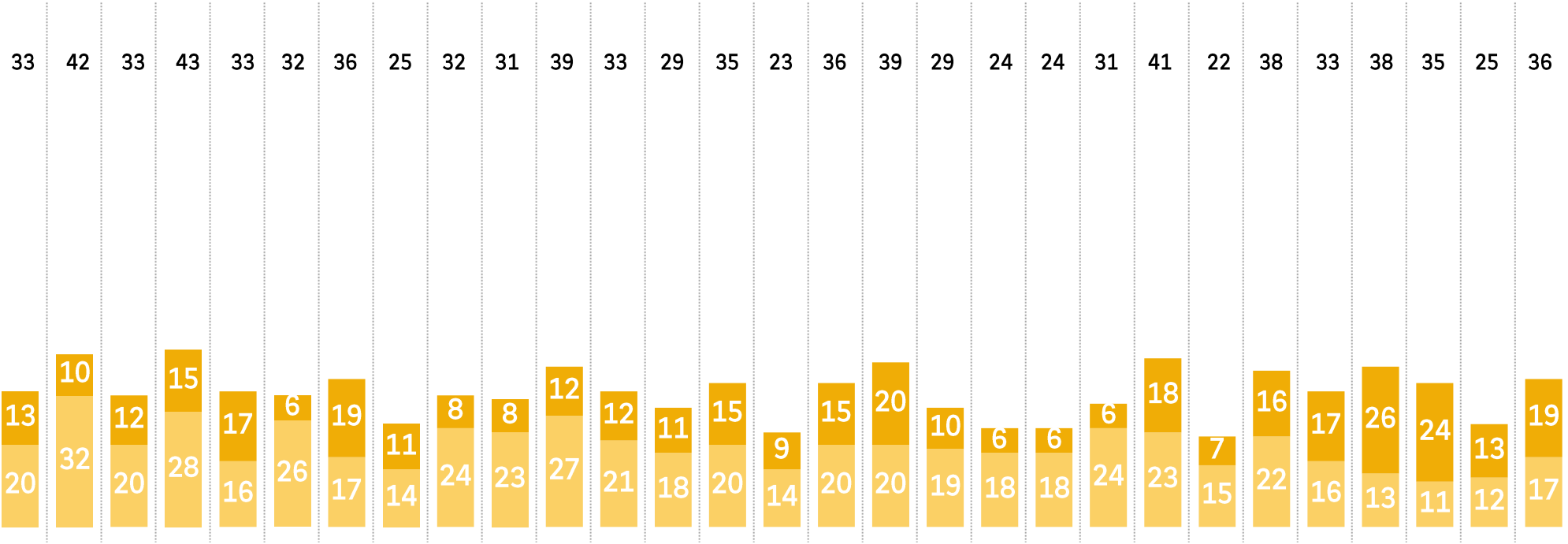
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using



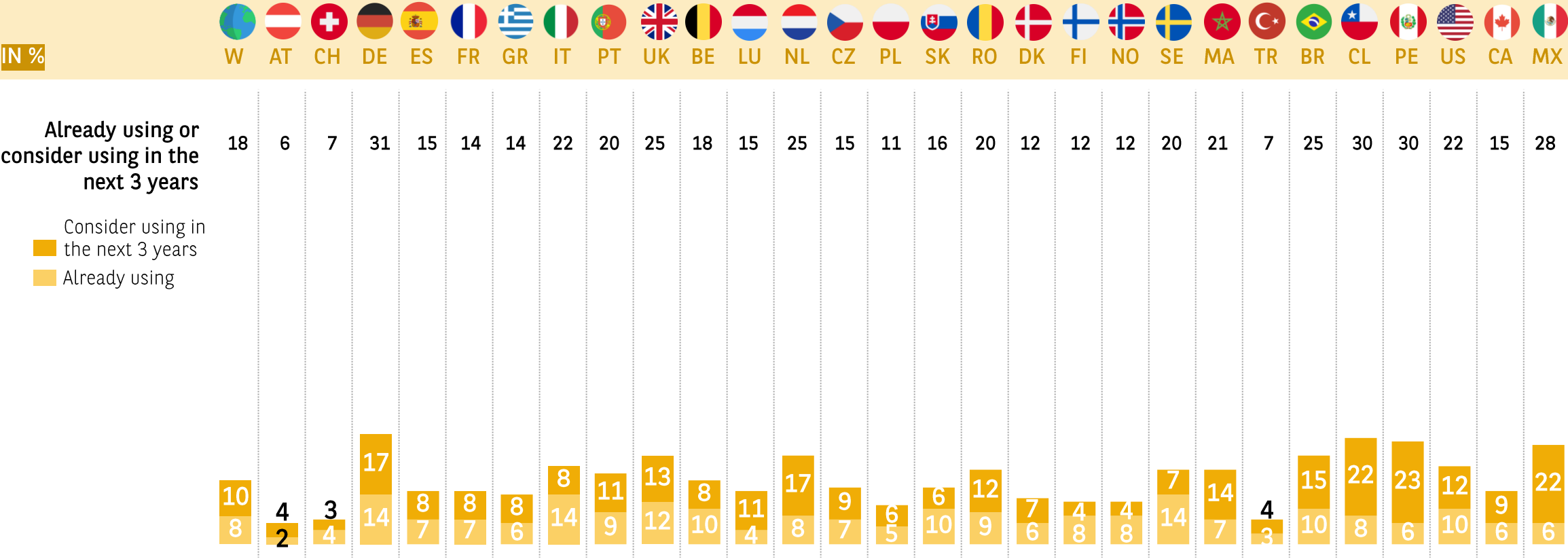
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PERSONAL VEHICLE EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In Denmark in 2025, 12% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.

IN %

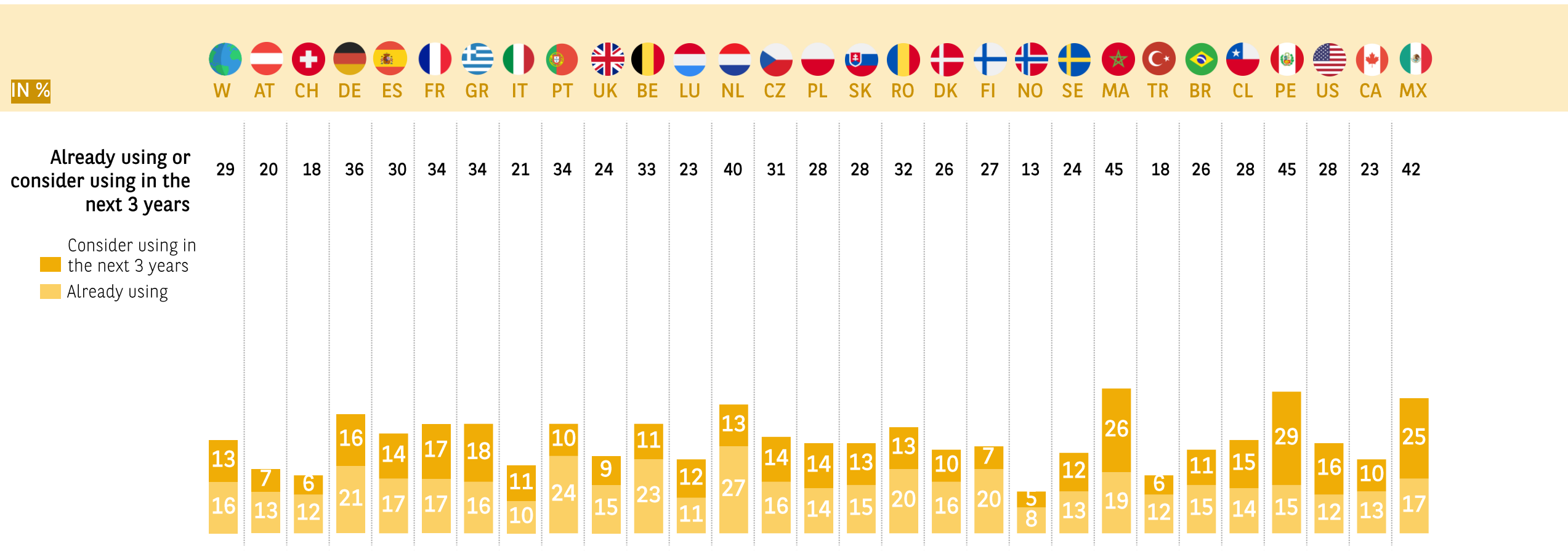


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

MOBILITY BUDGET

HOW TO READ THE RESULTS ?

In Denmark in 2025, 26% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.

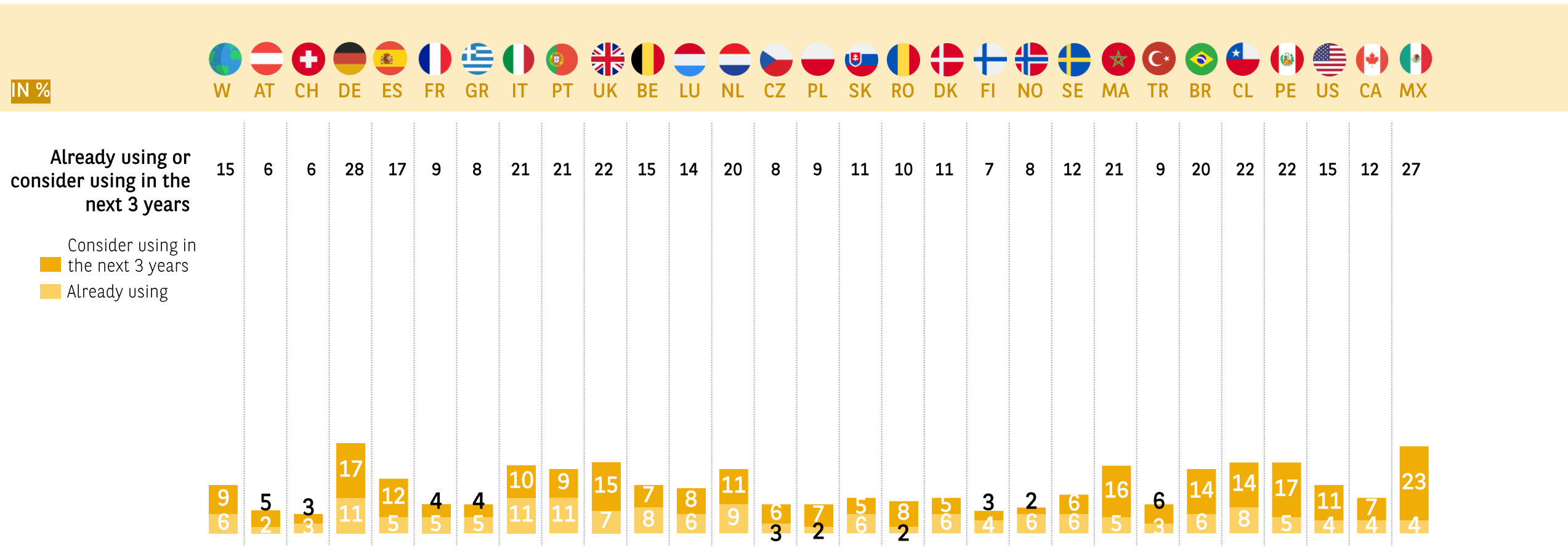


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

In Denmark in 2025, 11% of the companies are already using Private lease or salary sacrifice 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%

SHORT OR MID TERM RENTAL VEHICLE

HOW TO READ THE RESULTS ?

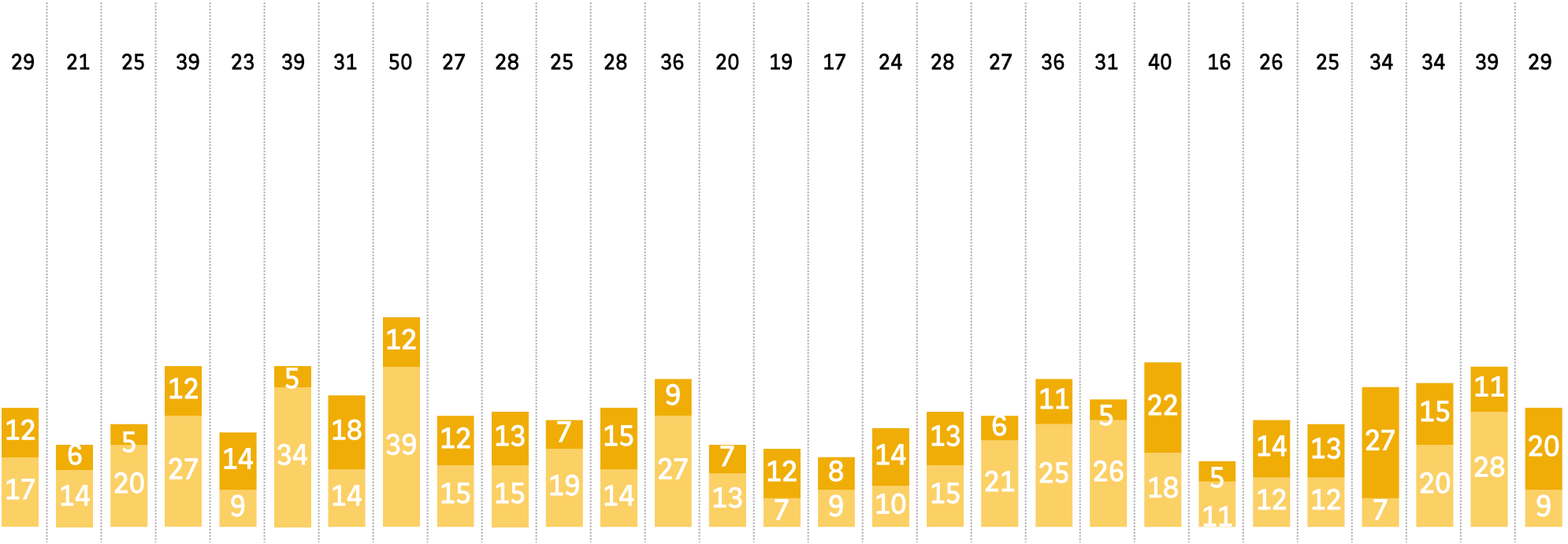
In Denmark in 2025, 28% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

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 Denmark in 2025, 34% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.

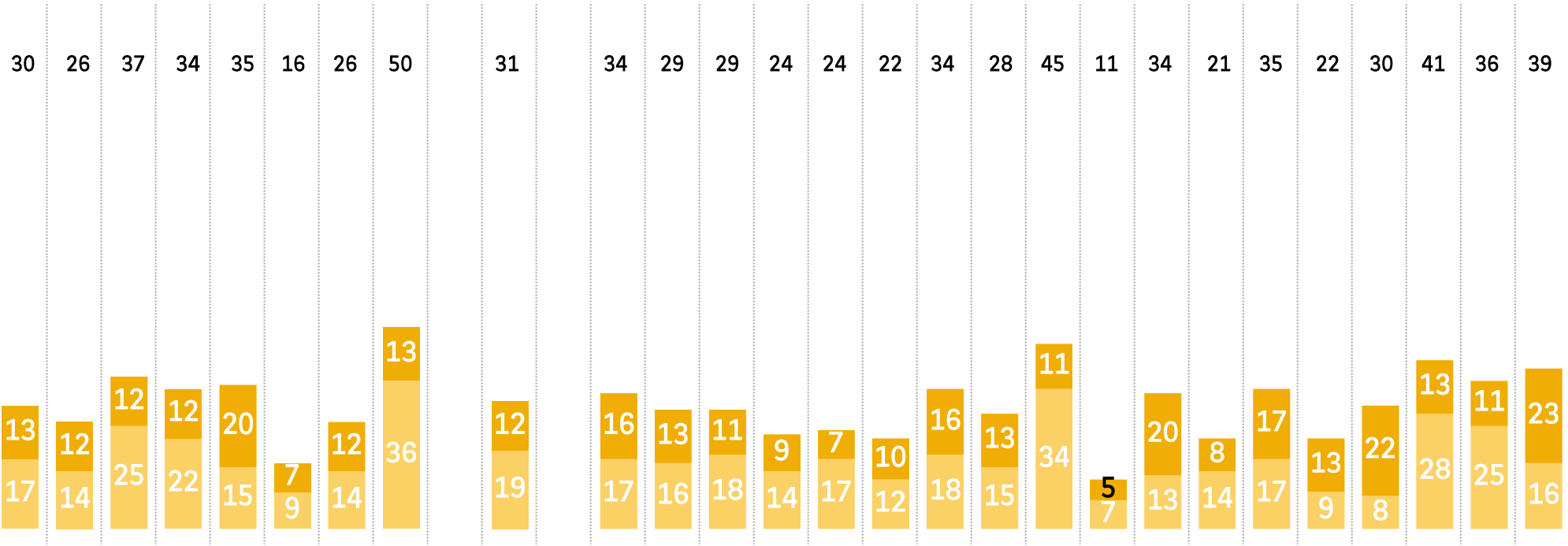
IN %



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 Denmark in 2025, 22% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

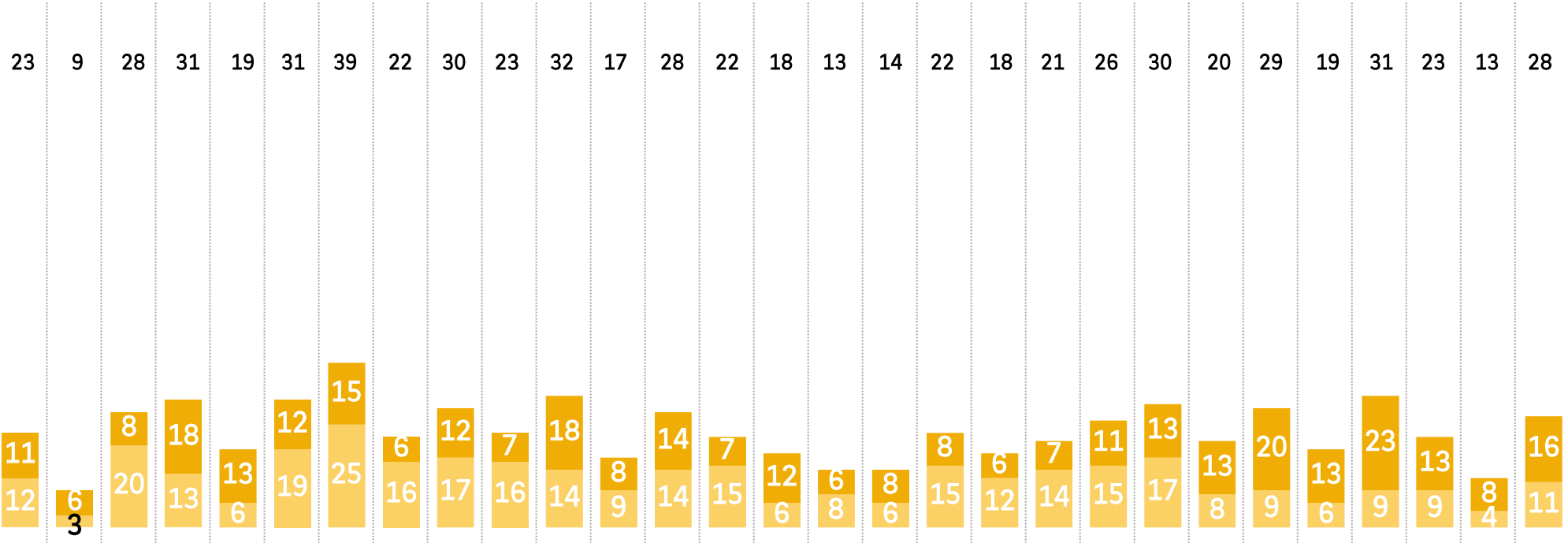
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using

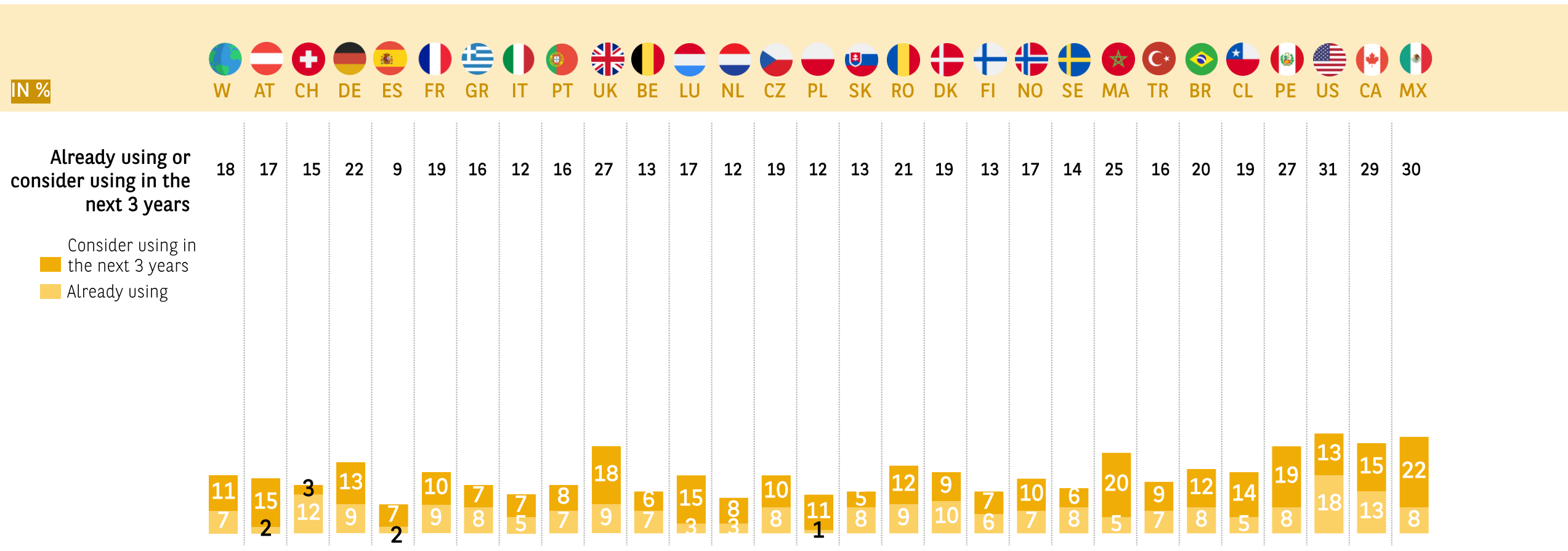


MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

RIDE SHARING / CARPOOLING

HOW TO READ THE RESULTS ?

In Denmark in 2025, 19% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.

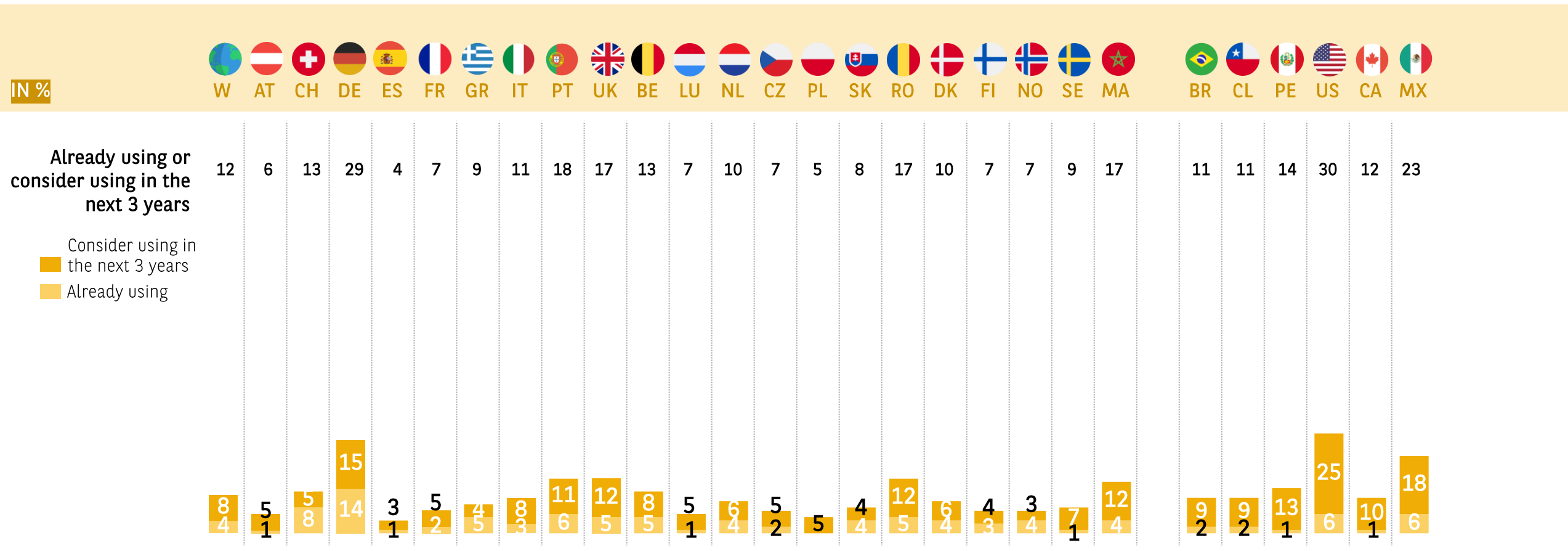


MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

BIKE LEASING

HOW TO READ THE RESULTS ?

In Denmark in 2025, 10% of the companies are already using Bike leasing or are considering doing so in the next 3 years.

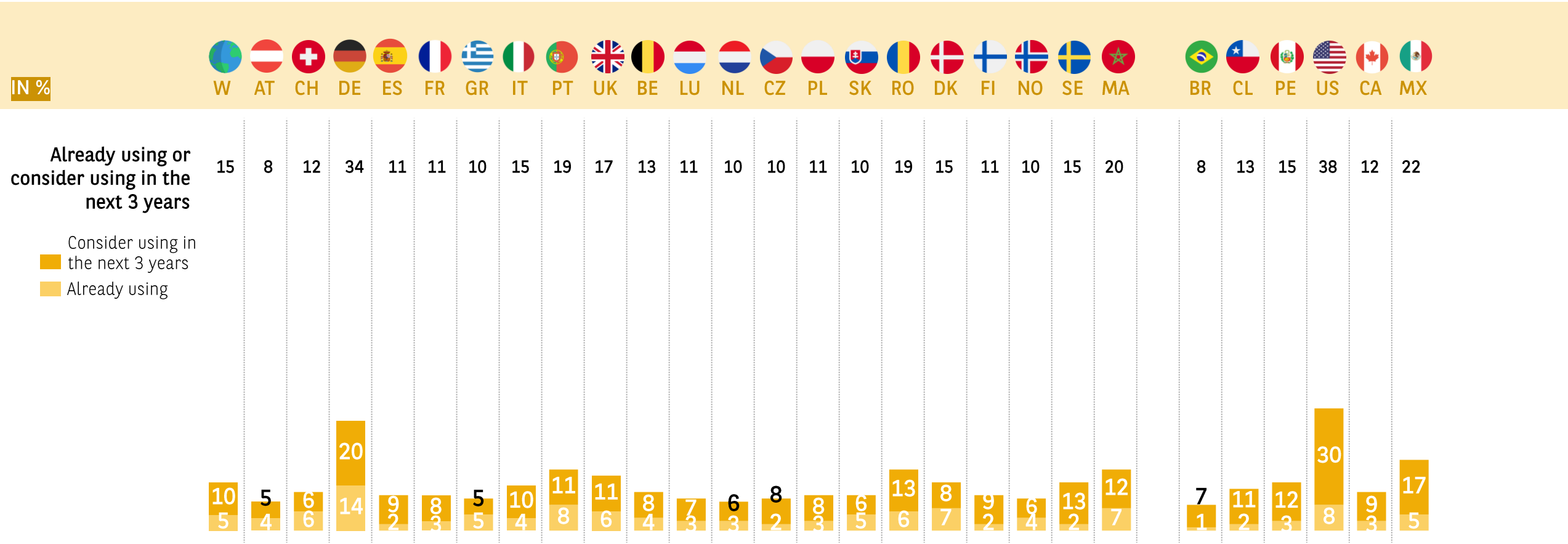


MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

BIKE SHARING

HOW TO READ THE RESULTS ?

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

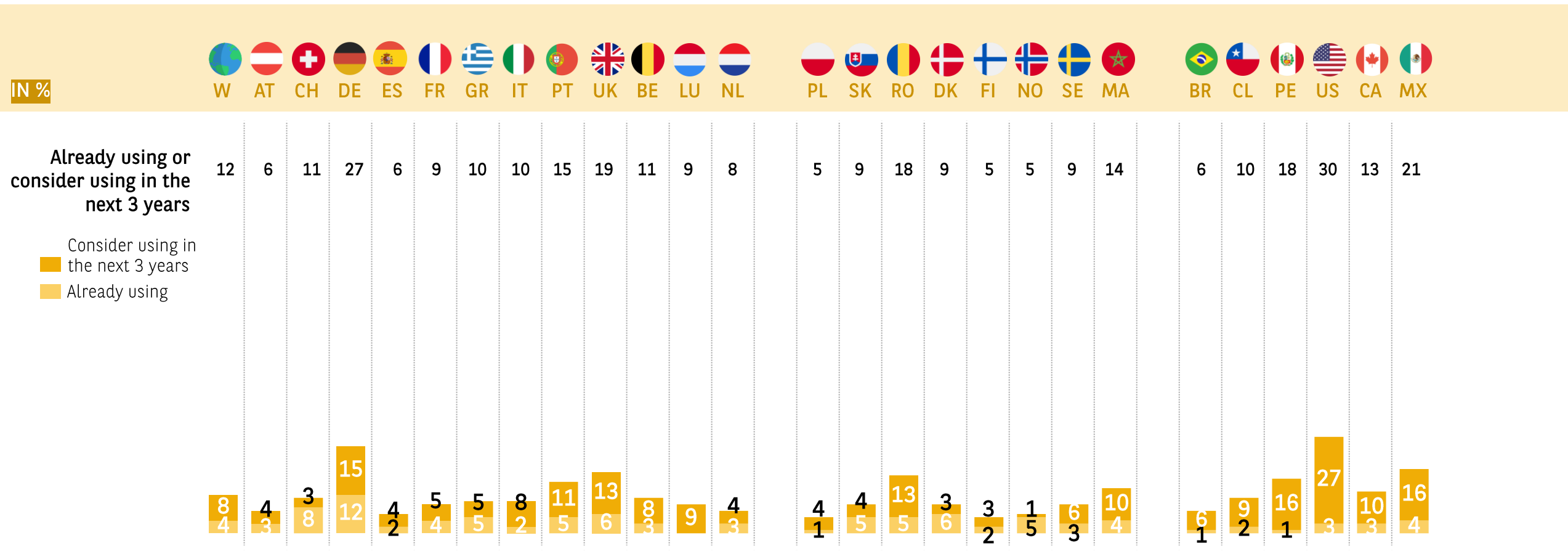


MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

SCOOTER AND MOTO LEASING

HOW TO READ THE RESULTS ?

In Denmark in 2025, 9% of the companies are already using Scooter and moto 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%

AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

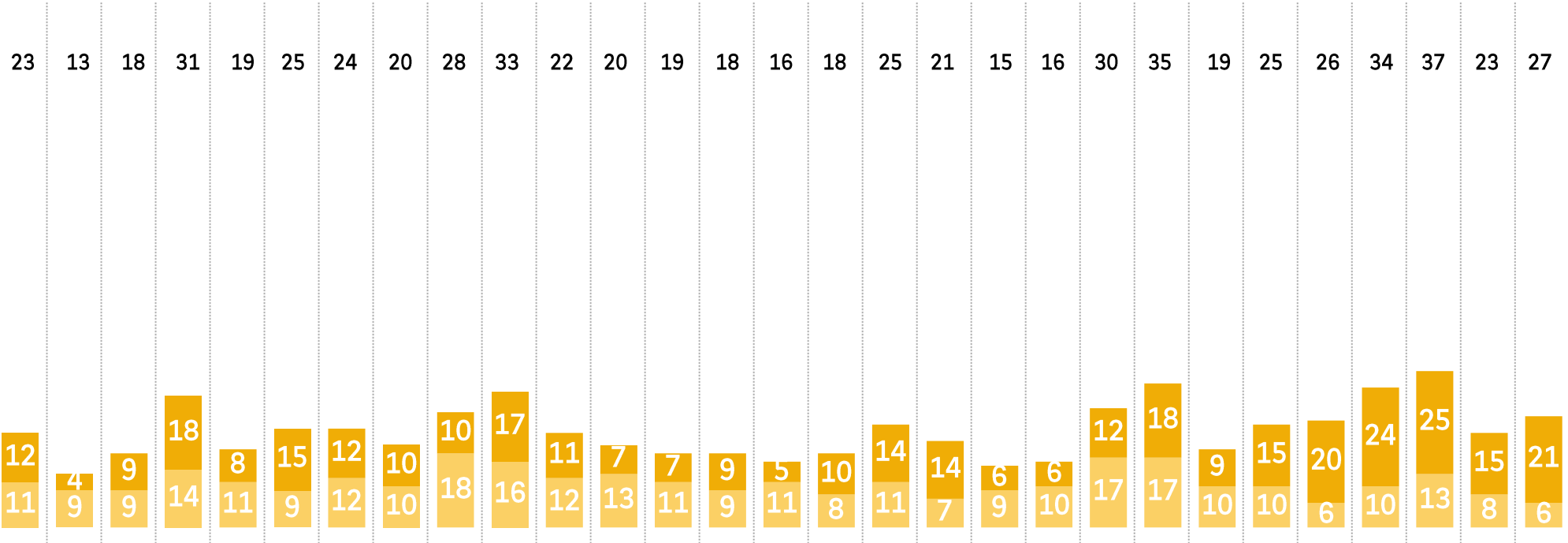
In Denmark in 2025, 21% of the companies are already using An app provided by the company to book multiple mobility solutions or are considering doing so in the next 3 years.

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 Denmark in 2025, 27% 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.

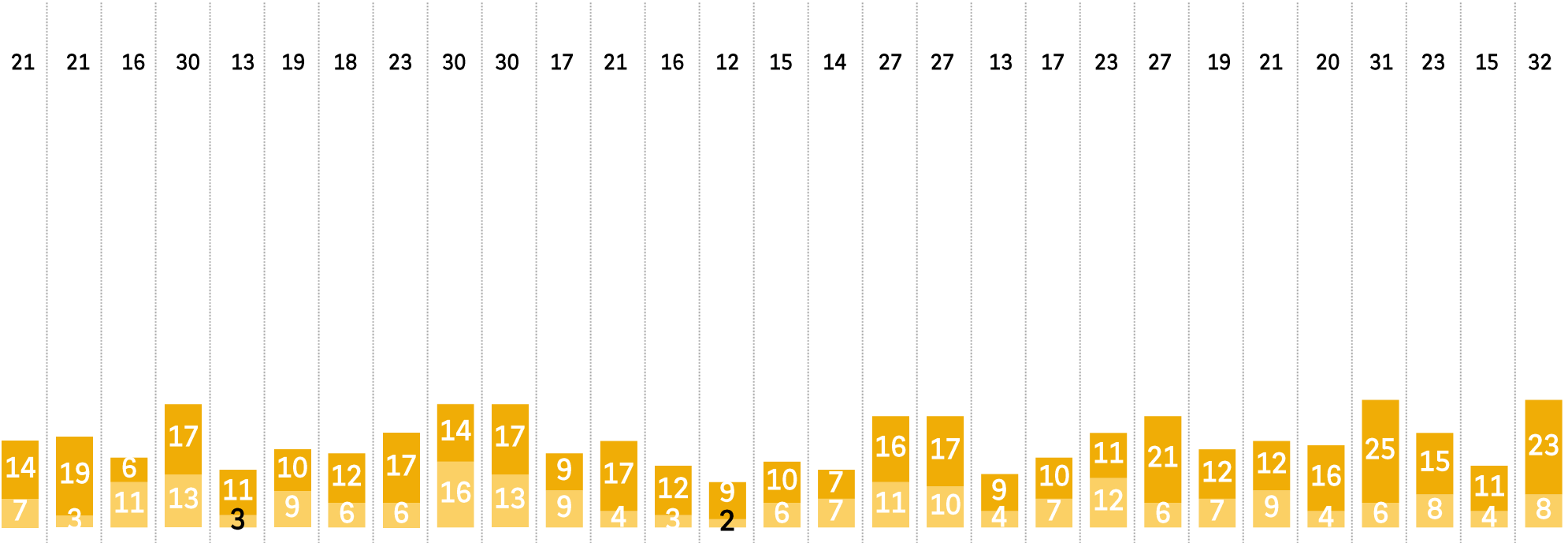
IN %



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%

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 Danish companies have set targeted decarbonization goals to date

11% of Danish companies have targeted decarbonization goals, but **27%** are currently evaluating such goals, showing a growing awareness of corporate decarbonization – with rather consistent results across company sizes and with the European average.

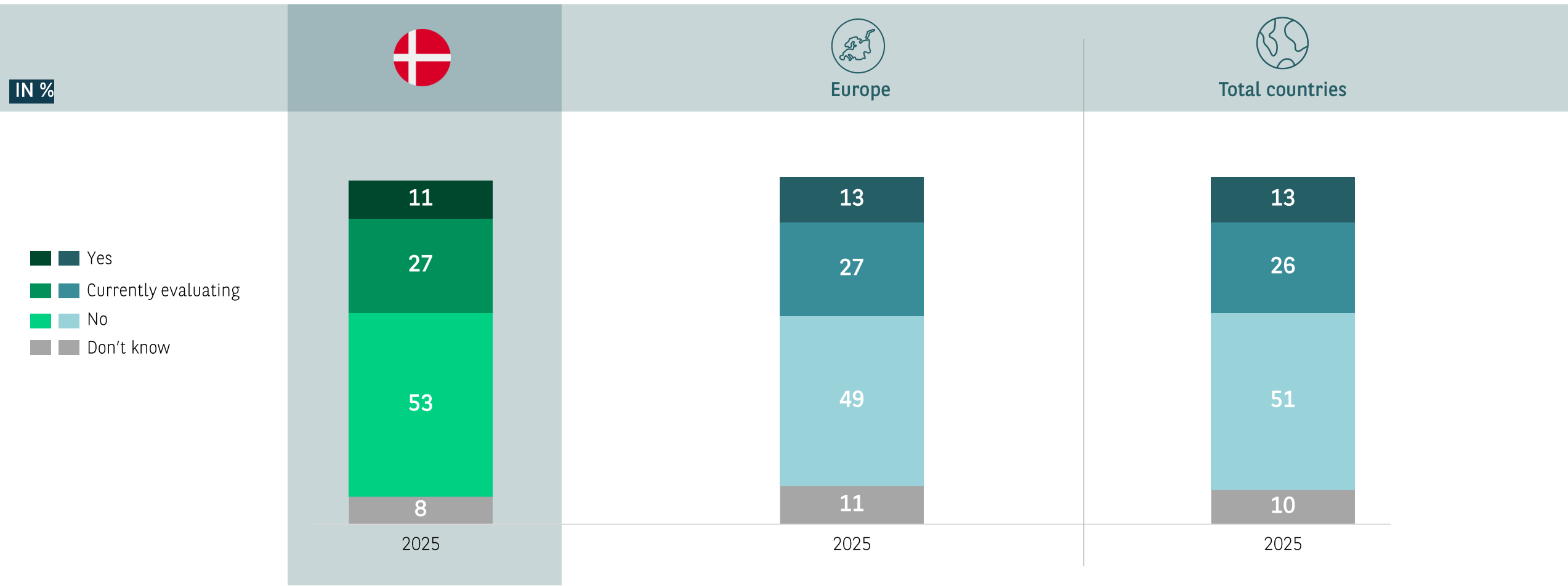
A significant weight of employee mobility: of those with decarbonization targets, **28%** consider employee mobility is a significant factor and 39% a moderate factor.

For Danish fleet managers, future fleet challenges are focused on promoting responsible driving, adaptation to restrictive public policies on ICE vehicles and fleet electrification

Promoting responsible driving (**30%**), adaptation to restrictive public policies on ICE (**29%**) and implementing alternative energy technologies (**29%**) are the top challenges for Danish fleet managers. The ranking is relatively stable compared to the previous year.

HOW TO READ THE RESULTS ?

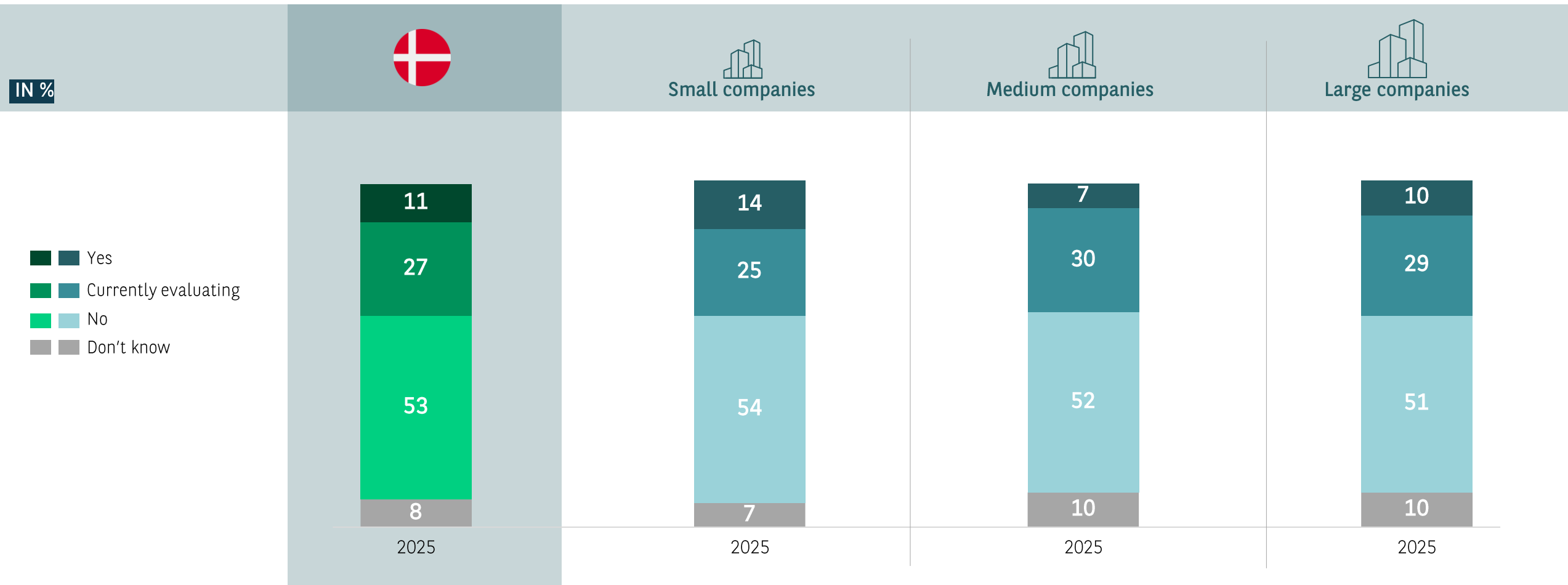
In Denmark in 2025, 11% of the companies have targeted decarbonization goals.



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

HOW TO READ THE RESULTS ?

In Denmark in 2025, 11% of the companies have targeted decarbonization goals.

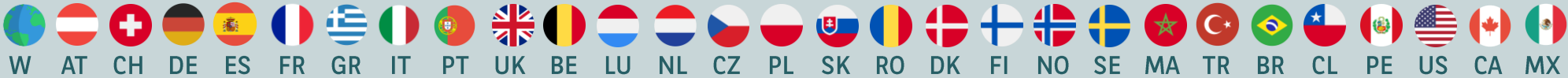


A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

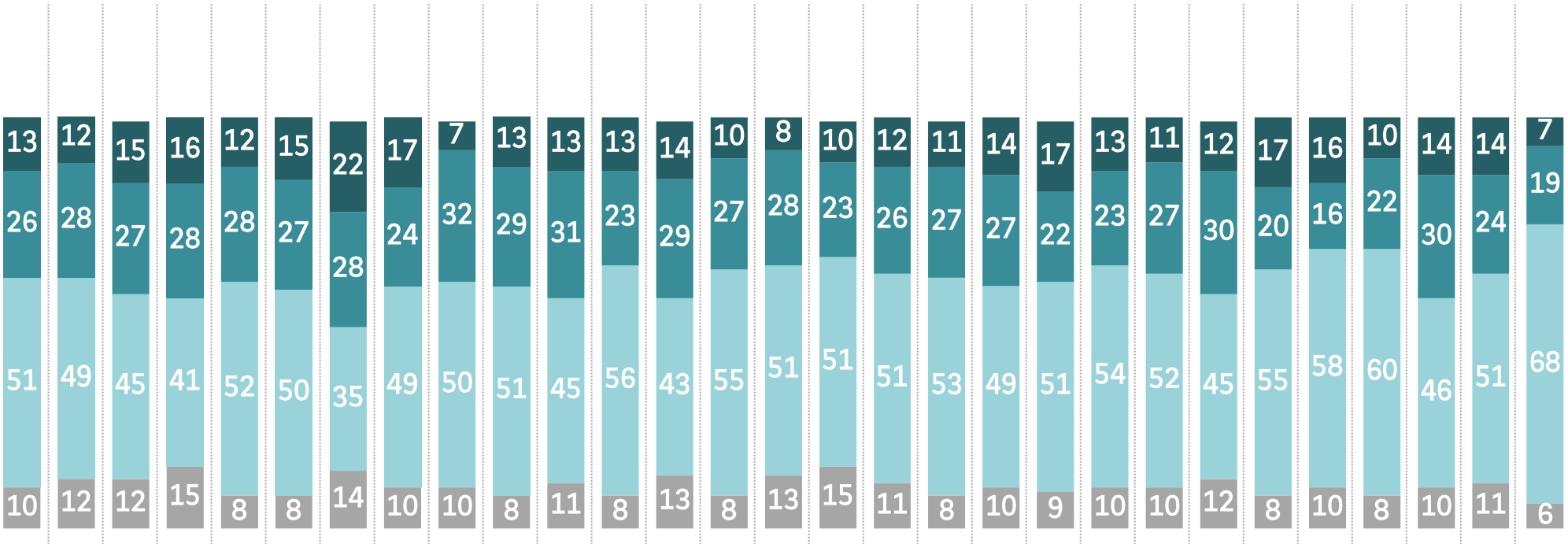
HOW TO READ THE RESULTS ?

In Denmark in 2025, 11% of the companies have targeted decarbonization goals.

IN %



Yes
Currently evaluating
No
Don't know



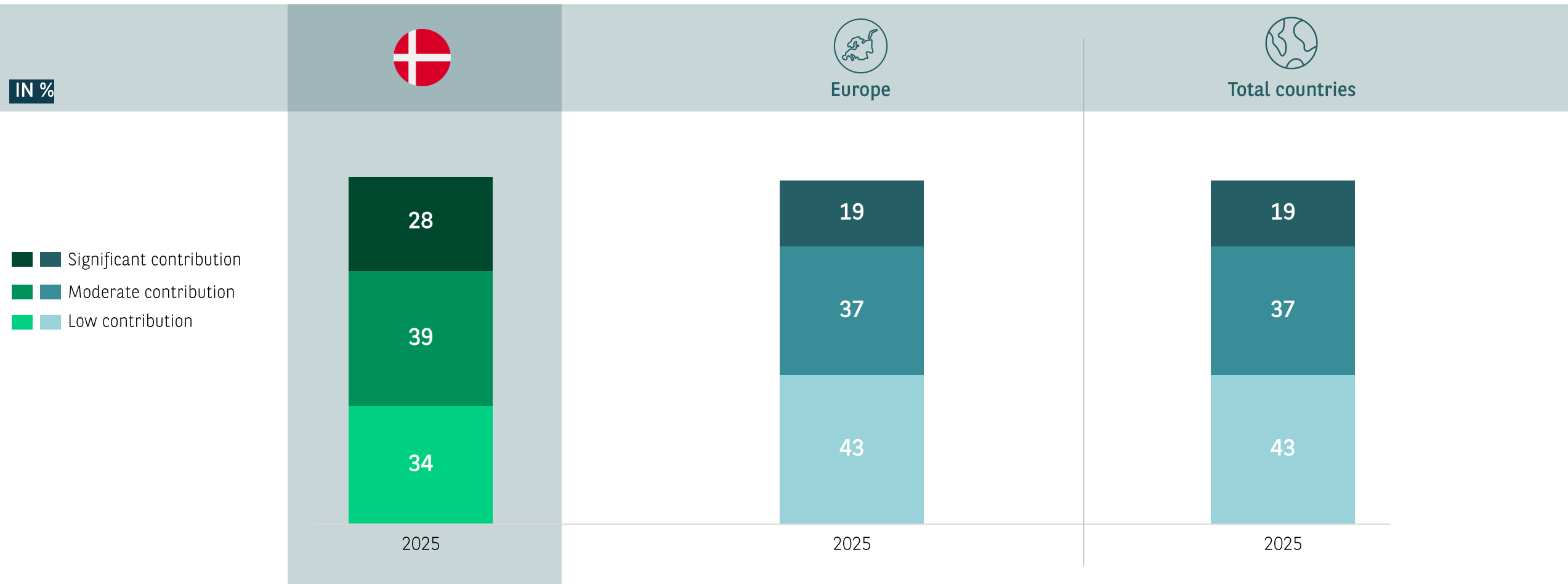
A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 28% 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

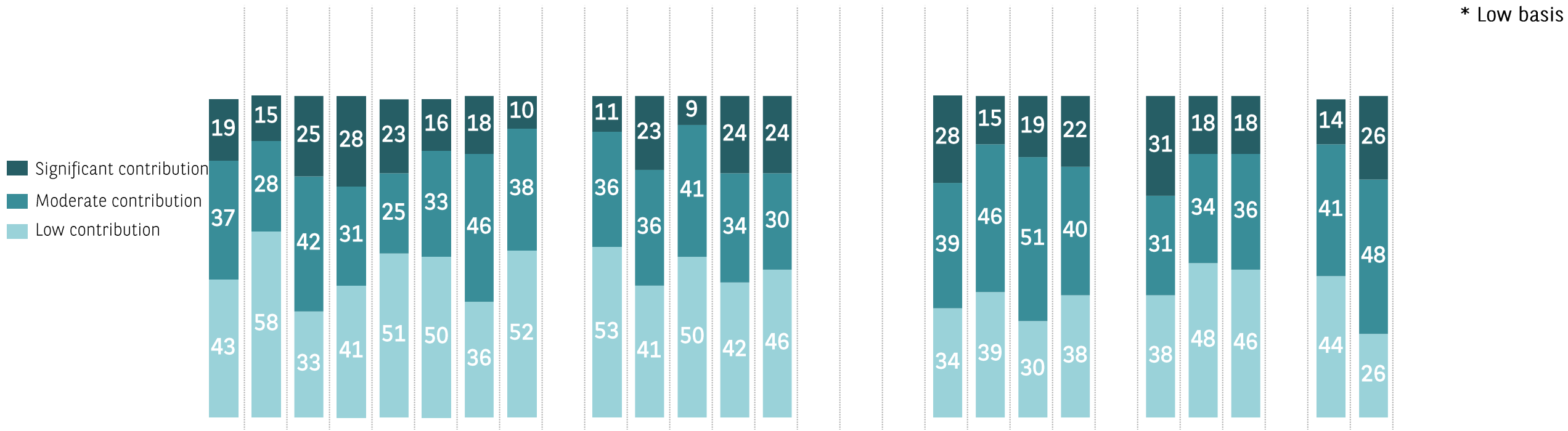
IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

New question

HOW TO READ THE RESULTS ?

In Denmark in 2025, 28% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

IN %

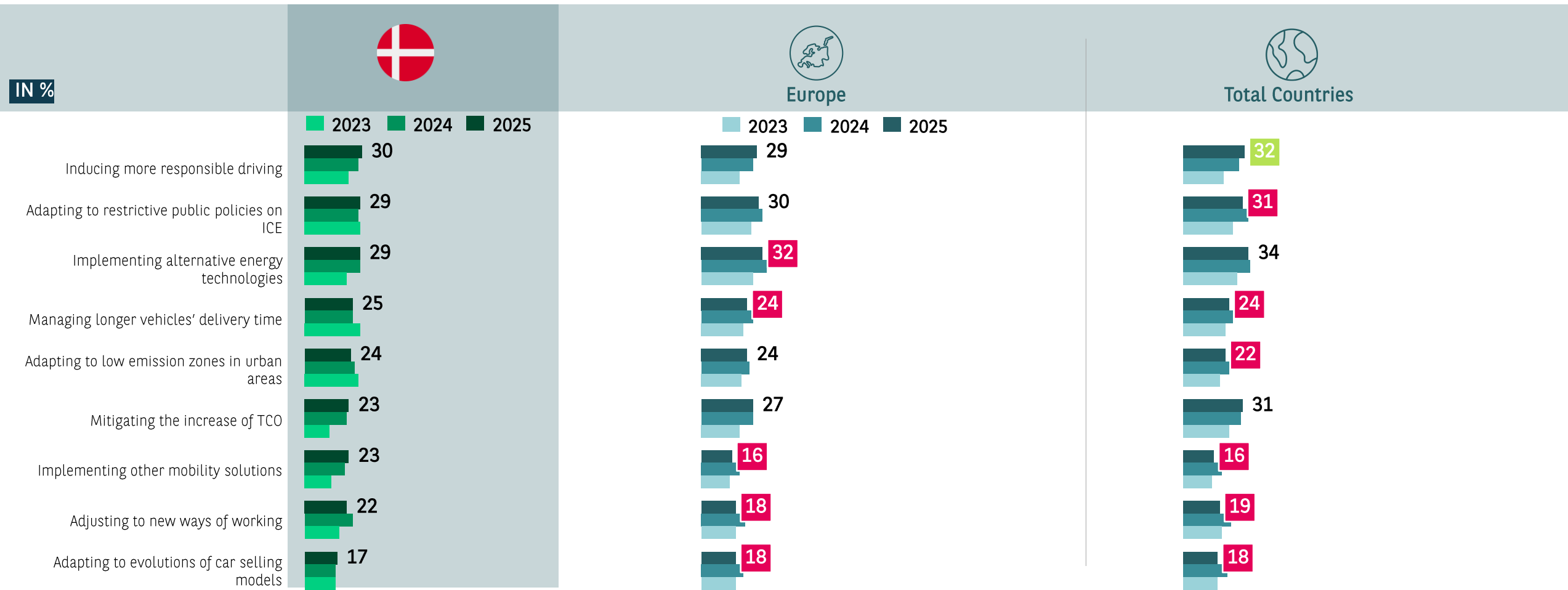


A57. How would you rate the contribution of employees mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Denmark in 2025, 30% 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

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Denmark in 2025, 30% of the companies declare that Inducing more responsible driving is top 1 challenge for fleet management in the next 3 years.

IN %

1st challenge
2nd challenge
3rd challenge



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 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
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
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
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
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
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

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.

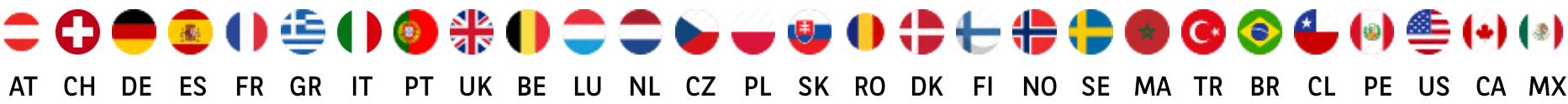
Mobility policies




- **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			●		●		●		●															●		

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