



E-mobility in companies: **Where Europe stands –** **and what is slowing** **down expansion**

Market research study with over 1,700 fleet managers
in eight European countries

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Introduction

The international DKV Mobility e-mobility study examines the current status, key challenges and future plans in fleet management among European companies. It highlights how far electrification has already progressed – and where the main obstacles remain.

One thing is clear:

The pressure to transform European corporate fleets is high. Three developments are shaping the situation for companies in particular:

 Rising costs	 Increasing sustainability requirements	 Growing complexity of electrification
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Despite these challenges, a large share of companies is actively pushing the transition to electric powertrains. **More than half of the companies** surveyed plan to increase the **proportion of fully electric vehicles in their fleets over the next two years**. Large enterprises and the transport sector in particular are leading the way in a European comparison.

At the same time, the study shows why many companies are still hesitant to further expand e-mobility. **High purchase and electricity costs, perceived limitations in driving range** and an **insufficiently developed public charging infrastructure** remain the most significant barriers. Nevertheless, **around 90% of companies that already operate electric vehicles** have

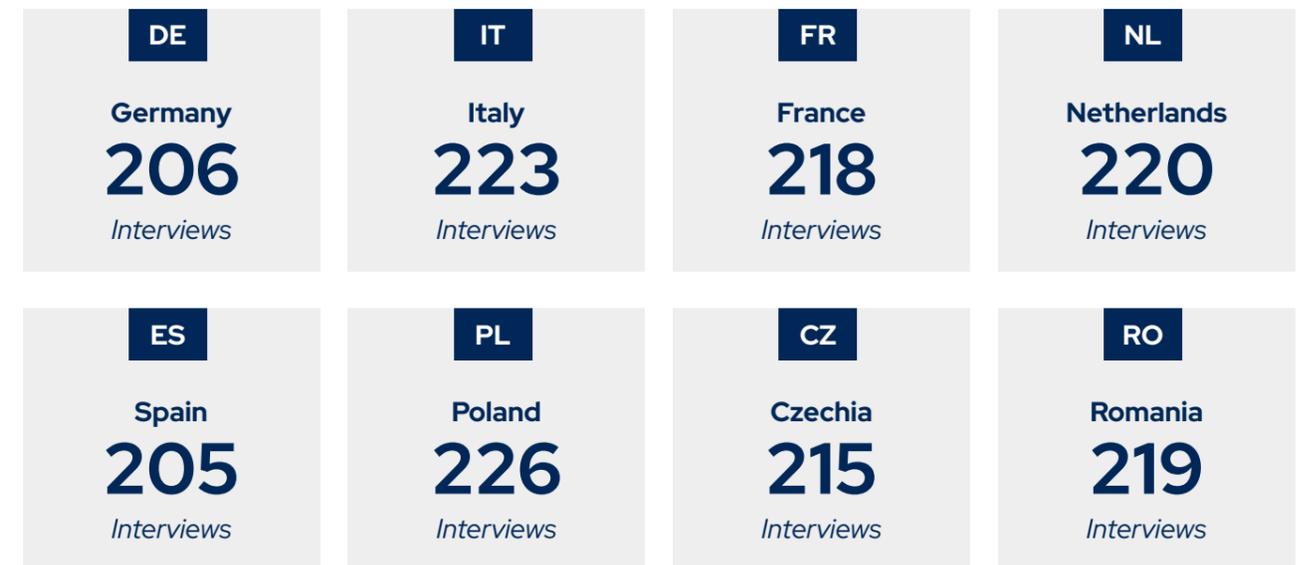
their own charging infrastructure in place today – with notable differences between countries. Germany, for example, is clearly ahead of other European countries in terms of the expansion of wallboxes, but lags somewhat behind in terms of the density of fast-charging stations.

Clear trends are also emerging in the powertrain mix. **Diesel remains the dominant propulsion type in European corporate fleets** but is increasingly being complemented by electric vehicles. Countries such as the Netherlands are driving the share of electric vehicles much more strongly, while Eastern European markets still show a lower level of electrification.

Ratingen, 25.03.2026

Study design

A total of 1,732 interviews were conducted with fleet managers in eight European countries for the study.



Survey period:
06.11.2025-16.11.2025

Conducting institute:
Innofact AG

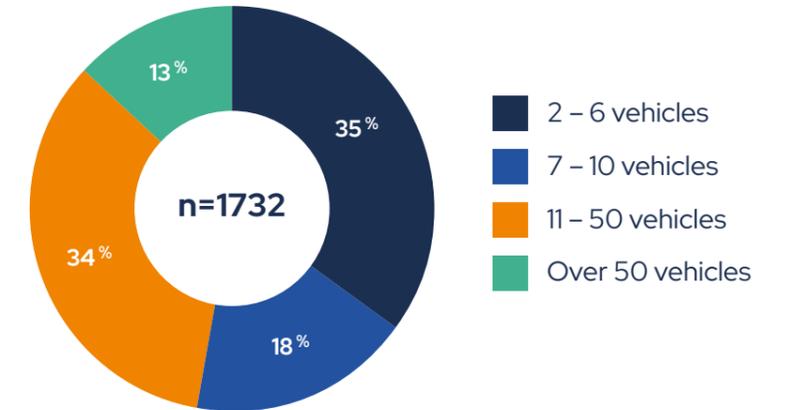
Methodology:
Standardized online-Interviews

The sample comprises only companies that operate fleets with at least two cars and/or vans (< 3.5 tons). The survey targeted key decision-makers in day-to-day fleet operations, including managing directors, fleet managers, and purchasers.

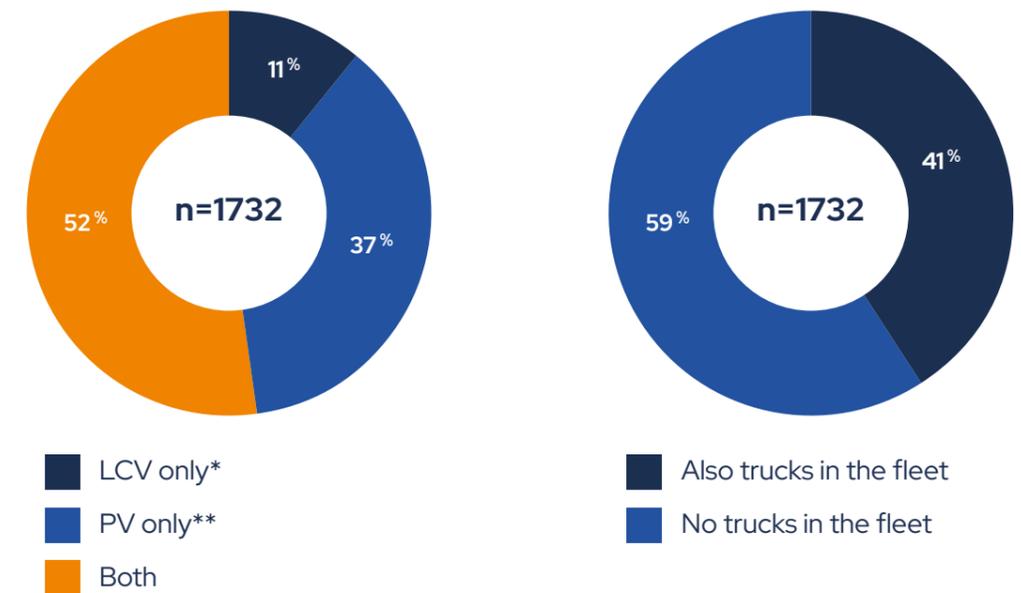
Sample structure

	Total	DE	IT	FR	NL	ES	PL	CZ	RO
Base	1732	206	223	218	220	205	226	215	219
1 employee	1,2 %	1,0 %	1,8 %	1,8 %	1,4 %	0,5 %	1,3 %	1,4 %	0,5 %
2 - 5 employees	6,1 %	4,9 %	5,4 %	6,0 %	6,8 %	9,3 %	6,2 %	6,5 %	3,7 %
6 - 10 employees	9,6 %	9,7 %	13,5 %	7,8 %	7,3 %	10,2 %	8,4 %	7,9 %	12,3 %
11 - 49 employees	20,4 %	16,0 %	22,4 %	16,1 %	17,3 %	22,4 %	20,8 %	22,8 %	25,1 %
50 - 99 employees	18,2 %	15,0 %	14,8 %	15,1 %	22,7 %	19,0 %	17,7 %	18,6 %	22,4 %
100 - 249 employees	17,8 %	18,9 %	18,4 %	18,8 %	16,4 %	21,0 %	22,6 %	14,4 %	11,9 %
250 - 499 employees	12,5 %	14,1 %	13,5 %	15,6 %	13,2 %	7,8 %	14,6 %	11,2 %	9,6 %
500 - 999 employees	7,2 %	10,7 %	5,4 %	8,7 %	7,3 %	4,4 %	4,0 %	8,8 %	8,2 %
1000+ employees	6,8 %	9,2 %	4,9 %	9,6 %	6,8 %	5,4 %	4,0 %	8,4 %	5,9 %

Fleet size
Total sample



Fleet composition
Total sample



*LCV = light commercial vehicles (< 3.5 tons)
** PV = passenger vehicles

Key findings at a glance



Powertrain mix

The European fleet market is still in a state of transition: diesel is currently still clearly the dominant form of propulsion, followed by gasoline.

Electrified powertrains have now reached a noticeable share but still lag significantly behind traditional internal combustion engines. Particularly striking is the widespread use of HVO 100, which is already actively used by many companies operating diesel vehicles.

Germany shows an above-average share of electric vehicles compared to other European countries, while the Netherlands stands out with both the lowest share of diesel vehicles and the highest proportion of fully electric cars.



Electrification plans

More than half of the companies surveyed plan to purchase additional fully electric vehicles over the next two years.

At the same time, many aim to reduce the number of conventional combustion-engine vehicles in their fleets. Large companies and the transport sector in particular are stepping up their investments in electric powertrains, while smaller businesses are taking a more cautious approach.

Countries such as Romania show particularly strong expansion momentum, and Germany is also clearly on a path toward greater electrification.



Barriers to electrification

The electrification of fleets is being slowed down by five key factors in particular:

- high acquisition costs,
- rising electricity and charging prices,
- ranges that are perceived as too short,
- an insufficiently developed public charging infrastructure
- and higher maintenance and servicing .

In the Netherlands, these barriers are perceived as significantly less severe compared to the European average, whereas they are particularly pronounced in Poland and Romania.



Corporate charging infrastructure

Charging infrastructure within companies is already well developed.

Around 90% of companies operating electric vehicles have their own charging points at company locations, typically a combination of wallboxes and fast-charging stations.

Germany holds a leading position in the rollout of wallboxes. Over the next two years, the majority of companies plan to make further investments in their own charging infrastructure.

Powertrain mix in corporate fleets



37%

Diesel remains the dominant fuel



21%

The Netherlands are driving EV adoption

Diesel continues to dominate fleet composition, with petrol remaining the second major pillar

Overall, diesel is the most common powertrain type (around a good third), followed by gasoline as the second-strongest segment.

Electrified powertrains already represent a relevant share – but still clearly lag behind diesel and gasoline

Battery-electric vehicles, plug-in hybrids and mild hybrids together form a noticeable share of the overall mix but remain well below conventional combustion engines.

HVO 100 has arrived in real-world use

Among companies with diesel vehicles, a large proportion already uses HVO 100.

Germany is close to the overall average in diesel share but shows a comparatively higher EV share

The diesel share in Germany resembles the total picture, while the share of fully electric vehicles is higher than the international average.

The Netherlands is the clear outlier: less diesel, significantly more fully electric vehicles

Compared to other countries, the Netherlands shows the lowest diesel share and the highest share of fully electric vehicles. HVO 100 usage is also particularly widespread.

Lower electrification in Eastern Europe

While countries like the Netherlands and Germany are already relying more heavily on electric powertrains, Eastern European fleets remain considerably behind in their adoption.

Question 01

What is the proportion of each of the following powertrain types in the passenger cars and vans within your fleet / company fleet?

Data basis: all respondents

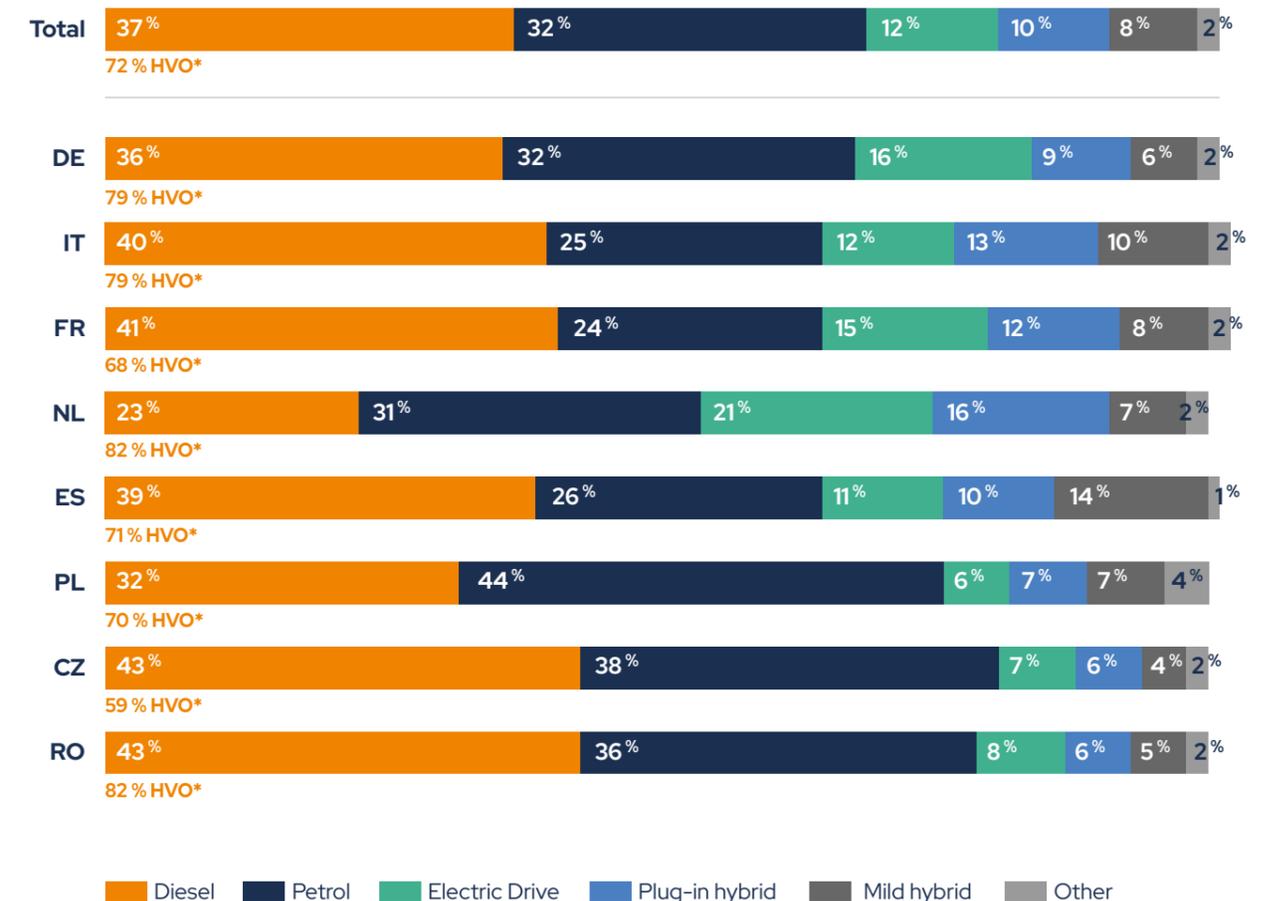
Follow-up question

Do you or your drivers use the more climate-friendly diesel alternative HVO 100?

Data basis: n = 1,198 (companies with diesel-powered vehicles only)

Proportions of Drive Types

*HVO (Base: Diesel Users)



Fleet management under pressure



76%

Costs are the primary driver in fleet management



73%

Sustainability requirements are becoming more important



70%

Electrification is increasing complexity in fleet management

Three topics dominate

Cost pressure (76%), sustainability requirements (73%) and the electrification of fleets or the introduction of electric vehicles (70%) are most frequently mentioned as challenges in fleet management.

Cost pressure is the strongest driver – including in Germany

In Germany, cost pressure (80%) and sustainability requirements (72%) are the top challenges.

Electrification increases operational complexity

In addition to the transition itself, the additional administrative effort becomes clear – in Germany, the administration of electric vehicles and charging points ranks third (67%).

Country comparison

The Netherlands and Spain perceive the situation as less tense. Compared with other countries, challenges in fleet management are overall rated as less severe there.

Question 02

To what extent do the following aspects pose a challenge for the management of your company's fleet?

Data basis: approximately n = 200 per country, all respondents

Challenges for Fleet Management

DE	IT	FR	NL	ES	PL	CZ	RO	Total	
80%	79%	79%	64%	56%	80%	82%	83%	76%	Cost pressure
72%	79%	79%	64%	49%	80%	78%	82%	73%	Sustainability requirements
66%	77%	79%	60%	54%	69%	76%	73%	70%	Electrification / introduction of E-vehicles
63%	71%	73%	64%	44%	71%	77%	78%	68%	Complete cost control and transparency
63%	73%	75%	62%	43%	68%	72%	76%	67%	Investment in the right digital tools
67%	76%	79%	64%	46%	60%	70%	70%	67%	Administration of E-vehicles and charging options
59%	72%	75%	58%	42%	68%	72%	77%	66%	Vehicle maintenance / processing of vehicle damage
62%	66%	70%	64%	42%	65%	71%	75%	65%	Driver administration / handling of driver expectations
66%	66%	70%	65%	44%	61%	68%	71%	64%	Provision of charging options / wallboxes
62%	69%	68%	58%	46%	63%	68%	72%	63%	Inadequate digitalisation and automation measures
63%	68%	74%	53%	37%	62%	66%	72%	62%	Too many / dissimilar systems / software products
52%	61%	66%	53%	39%	53%	56%	59%	55%	Leasing / Leasingrückgabe

< 60% 60 – 69% 70–79% ≥ 80% Main Challenges per Country

Challenges in fleet management increase with fleet size

 **76%**

Costs are the primary driver in fleet management

 **73%**

Sustainability requirements are becoming more important

The size of a fleet plays a decisive role

Overall, there is a clear correlation between fleet size and the level of pressure in fleet management – the larger the fleet, the more strongly the challenges are perceived.

Cost and sustainability issues increase noticeably with fleet size

Both cost pressure and sustainability requirements are mentioned significantly more often as challenges in large fleets than in small ones.

Industry differences are clear

Challenges in fleet management are perceived most strongly in the transport sector.

Question 02.1

To what extent do the following aspects pose a challenge for the management of your company's fleet?

Data basis: all respondents

Challenges for Fleet Management

	Size of Fleet					Industry			
	Total	2 - 6	7 - 10	11 - 50	50+	Transport	Services	Trade	Other
Cost pressure	76%	71%	82%	75%	80%	79%	78%	74%	73%
Sustainability requirements	73%	68%	73%	76%	79%	76%	68%	71%	73%
Electrification / introduction of E-vehicles	70%	64%	68%	74%	73%	73%	65%	68%	69%
Complete cost control and transparency	68%	62%	71%	71%	72%	70%	63%	69%	68%
Investment in the right digital tools	67%	58%	70%	71%	74%	72%	63%	69%	65%
Administration of E-vehicles and charging options	67%	63%	65%	70%	71%	69%	69%	67%	65%
Vehicle maintenance / processing of vehicle damage	66%	61%	67%	67%	72%	69%	62%	68%	64%
Driver administration / handling of driver expectations	65%	56%	70%	70%	67%	68%	61%	65%	64%
Provision of charging options / wallboxes	64%	59%	66%	68%	63%	63%	66%	65%	64%
Inadequate digitalisation and automation measures	63%	60%	62%	66%	68%	64%	58%	63%	65%
Too many / dissimilar systems / software products	62%	54%	62%	67%	68%	64%	63%	61%	61%
Leasing / Leasing return	55%	51%	57%	56%	60%	57%	57%	58%	52%

■ < 60 %
 ■ 60 - 69 %
 ■ 70-79 %
 ■ ≥ 80 %
 — Main Challenges per Subgroup

Electrification is gaining momentum: companies plan to add more electric vehicles



56%

Companies are shifting to electric vehicles

RO

74%

Significant expansion in Romania

Expansion of BEVs dominates

more than half of the surveyed companies (56%) plan to purchase more fully electric vehicles in the next two years, while only a much smaller share (15%) plan to reduce the number of BEVs.

Conventional powertrains are losing relevance

while a smaller group (22%) intends to acquire more vehicles with conventional fuels (diesel, gasoline, mild hybrid), a larger share (36%) plans to reduce them.

Romania is driving electrification most strongly

the planned expansion of fully electric vehicles is particularly pronounced there (74% "more" vs. 7% "less").

Germany is also clearly moving toward expansion

more than half of companies in Germany (53%) plan to increase the number of fully electric vehicles, while only 13% expect a decline.

Plugin hybrids remain an important component

around 40% of companies plan to acquire more plugin hybrids, while around 20% expect to have fewer of them in the fleet.

Alternative fuels are generally declining

for hydrogen, 21% expect an increase, while 38% anticipate fewer hydrogen vehicles. Autogas shows a similar pattern: 15% plan to add more vehicles, while 45% expect a decrease.

Question 03

Thinking about the next two years and the composition of your fleet in two years: what changes or new acquisitions are planned for your company?

Data basis: approximately n = 200 per country, all respondents

Future Fleet (next 2 years)



Larger companies and the transport sector invest significantly more in e-mobility



66%

Larger companies are accelerating e-mobility plans

Company size is a key driver

the larger the company, the greater the planned expansion of electric vehicles over the next two years – large companies invest more heavily in e-mobility than smaller ones.



67%

The transport sector is planning the largest expansion

Small vs. very large companies

among small companies, around half plan to further electrify their fleets in the next two years; among very large companies, the share is around two thirds.

Clear industry differences

the willingness to electrify is generally higher in the transport sector than in other industries. While roughly two thirds of companies in transport plan to further expand their share of electric vehicles, the figure in the retail sector is around half.

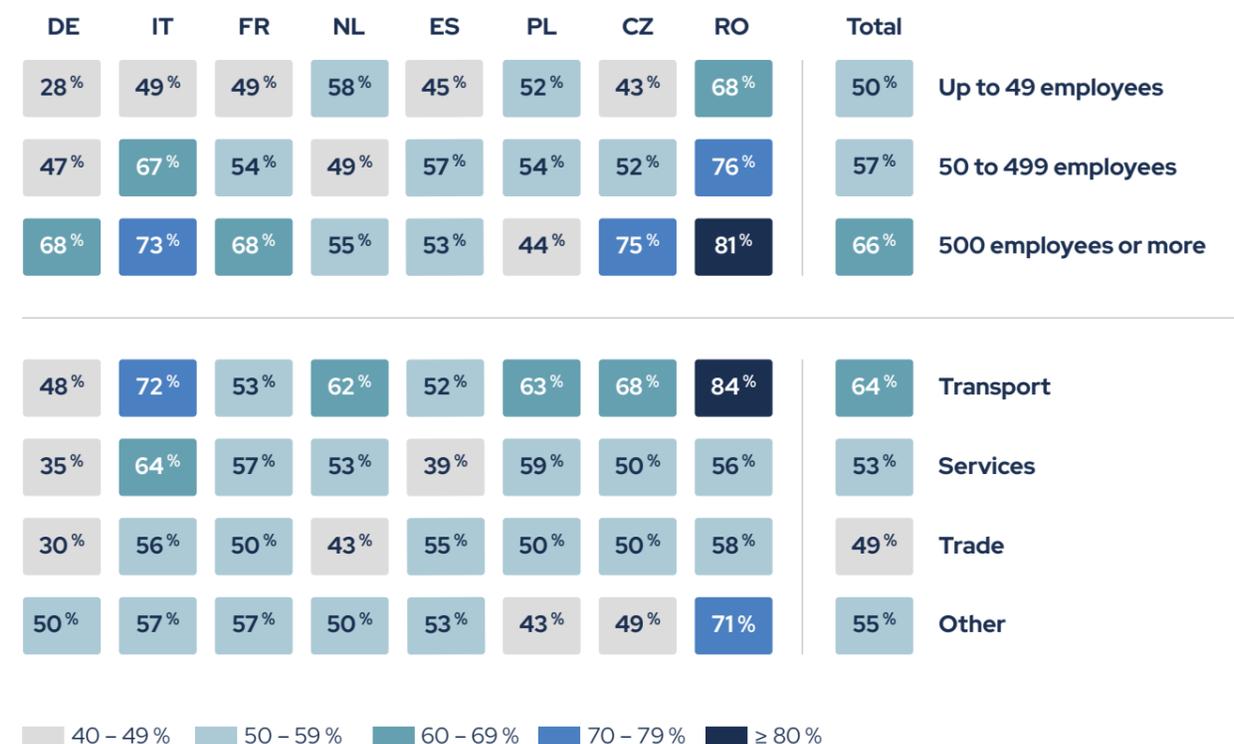
Question 03.1

Thinking about the next two years and the composition of your fleet in two years: what changes or new acquisitions are planned for your company?

Data basis: approximately n = 200 per country, all respondents

Future Fleet (next 2 years)

Share of more E-Vehicles in Future Fleet – relevant subgroups



Barriers to fleet electrification



73%

**Key factor:
high upfront costs**

Three main strumbling blocks dominate

the biggest obstacles to switching or expanding company fleets to e-mobility are primarily costs (purchase of new vehicles and electricity costs), the limited range of electric vehicles and inadequate public charging infrastructure.



70%

**Main barriers:
range and infrastructure**

Costs and range are especially critical

high purchase costs, electricity prices and limited driving range stand out as the most significant barriers.

Country comparison

compared with all other surveyed countries, the Netherlands perceives these barriers much less strongly. In contrast, the obstacles are seen as more significant in Poland and Romania.



**Significant differences
between countries**

Assessment is consistent across company sizes

the mentioned barriers are evaluated relatively uniformly, regardless of company size. Industry differences only play a minor role here.

Question 04

Are there any factors that hinder the transition or expansion of your company fleet (passenger cars with electric powertrains) toward e-mobility?

Data basis: approximately n = 200 per country, all respondents

E-Mobility Barriers for Fleet

DE	IT	FR	NL	ES	PL	CZ	RO	Total	
69%	80%	68%	55%	69%	80%	76%	84%	73%	Purchase prices of the vehicles too high
68%	73%	65%	52%	69%	81%	74%	82%	71%	Short range of vehicles with alternative drives
71%	73%	65%	47%	65%	79%	70%	79%	69%	Insufficiently developed public infrastructure
73%	74%	70%	53%	61%	75%	65%	74%	68%	Electricity prices too high
61%	67%	68%	54%	65%	76%	71%	76%	67%	High cost of maintenance / servicing / care
60%	69%	70%	54%	59%	75%	70%	75%	67%	Purchase/administration of electric vehicles more expensive
60%	66%	63%	58%	64%	76%	63%	75%	66%	The regulatory environment is difficult to assess
62%	65%	64%	56%	60%	74%	73%	66%	65%	Short service life of E-vehicles
59%	67%	61%	53%	62%	73%	70%	72%	65%	Residual value risks of E-vehicles
60%	62%	62%	44%	72%	72%	68%	77%	65%	Funding available government legislatio /policies is too little
61%	65%	60%	44%	64%	68%	65%	74%	62%	Insufficiently developed charging infrastructure at company
48%	55%	57%	46%	57%	60%	49%	60%	54%	No focus on sustainability / reduction of CO2
52%	52%	47%	45%	52%	57%	56%	53%	52%	Insufficient acceptance from drivers / employees

■ < 60%
 ■ 60 – 69%
 ■ 70–79%
 ■ ≥ 80%
 Main Barriers per Country

What accelerates electrification



Three key levers are crucial for electrification

to meaningfully influence a company's decision toward greater e-mobility, the main barriers that must be overcome are high costs (particularly the purchase of new vehicles and electricity costs), the perception of insufficient driving range, and inadequate public charging infrastructure.

Question 05

Which obstacles would need to be overcome to meaningfully influence your company's decision toward greater e-mobility?

Data basis: approximately n = 200 per country, only companies that indicated obstacles in the previous question

Biggest Challenges to increase Fleet E-Mobility (multiple answers possible)

DE	IT	FR	NL	ES	PL	CZ	RO	Total	
25%	27%	34%	27%	37%	41%	42%	42%	35%	Purchase prices of the vehicles too high
30%	24%	32%	26%	20%	34%	21%	32%	27%	Electricity prices too high
23%	27%	28%	19%	25%	22%	32%	27%	25%	Short range of vehicles with alternative drives
20%	21%	14%	9%	24%	23%	19%	27%	20%	Insufficiently developed public charging infrastructure
13%	15%	12%	17%	19%	22%	21%	27%	18%	High cost of maintenance / servicing / care
12%	15%	19%	19%	16%	14%	24%	17%	17%	Short service life of E-vehicles
13%	14%	12%	10%	18%	12%	10%	22%	14%	Funding available government legislation / policies too little
13%	16%	12%	8%	15%	15%	14%	14%	14%	Insufficiently developed charging infrastructure at company
8%	17%	13%	15%	9%	16%	13%	14%	13%	Purchase/administration of electric vehicles are more expensive
12%	16%	17%	14%	13%	12%	7%	7%	12%	The regulatory environment is difficult to assess
15%	11%	7%	15%	12%	12%	13%	9%	12%	Residual value risks of E-vehicles
7%	7%	9%	11%	7%	10%	13%	9%	9%	Insufficient acceptance from drivers / employees
6%	8%	10%	10%	5%	9%	5%	6%	7%	No focus on sustainability / reduction of CO2

< 10%
 10 - 19%
 20 - 29%
 30 - 39%
 ≥ 40%
 Main Barriers per Country

Onsite charging infrastructure has become established



Own charging infrastructure is widely established

overall, almost 90% of the surveyed companies with electric vehicles or plugin hybrids have their own (non-public) charging infrastructure on company premises. A large proportion rely on wallboxes (39%) and even more on fast charging stations (60%) on site.



A relevant minority still lack their own infrastructure

11% report having no dedicated charging infrastructure at all on their premises.



Germany clearly stands out in the use of wallboxes

the share of company-owned wallboxes is significantly higher in Germany (61%) than in any other surveyed country.

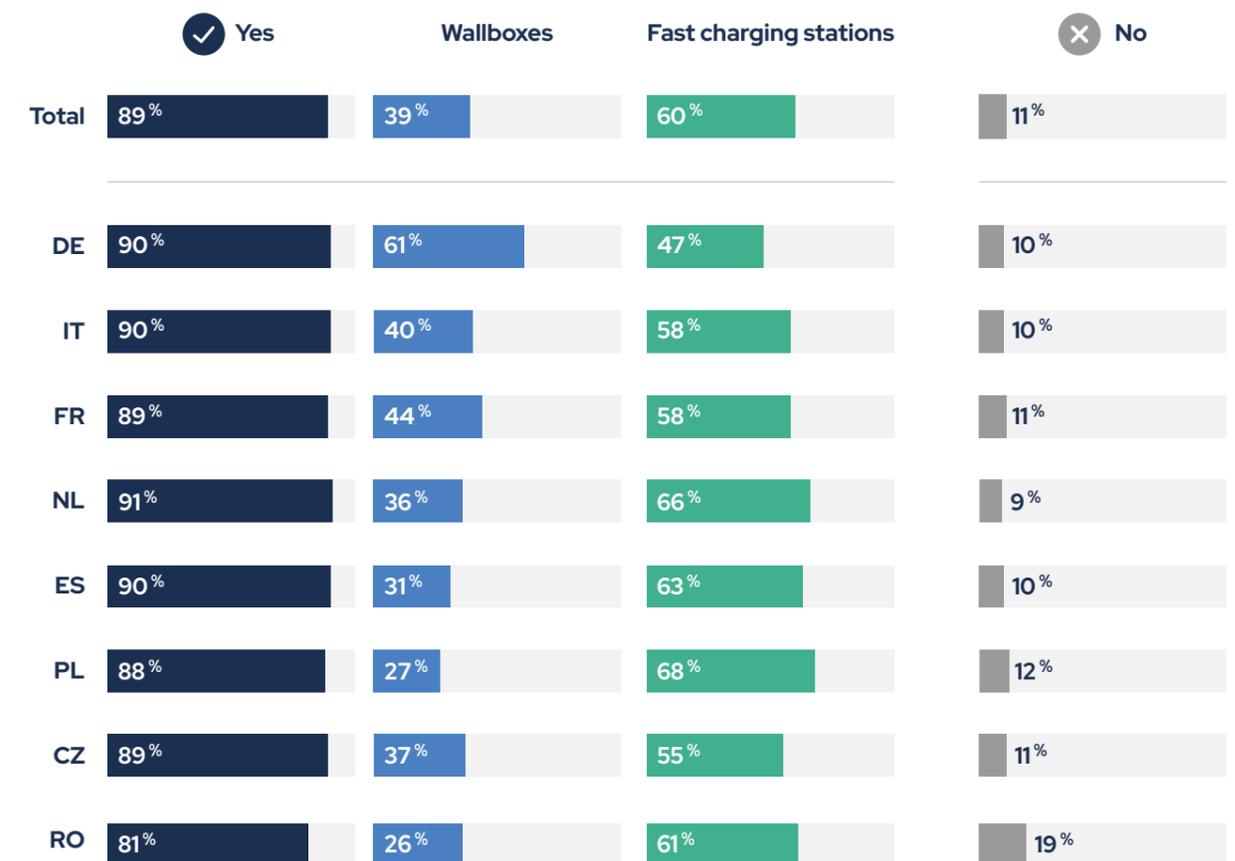
Question 06

Do you have your own charging infrastructure (i.e., non-public) on your company premises?

Data basis: approximately n = 100 per country, only companies with electric vehicles or plugin hybrids in their fleets

Own Charging Infrastructure

(multiple answers possible)



Expansion of charging infrastructure



70 %

Planned expansion of company-owned charging infrastructure

Expansion is the norm, not the exception

overall, a clear majority of companies plan to further expand their own charging infrastructure over the next two years (70%); around one third do not plan any additional expansion.



80 %

Transport sector leading the expansion

Country comparison – Southern and Western Europe in the lead

in Italy, France and the Netherlands, the willingness to invest in expanding company-owned charging infrastructure is significantly higher than in the other surveyed countries.

Larger companies invest more strongly

the larger the company, the higher the willingness to continue investing in the expansion of their own charging infrastructure over the next two years.

Transport sector as a driver

in the transport industry, the willingness to expand company-owned charging infrastructure over the next two years is particularly high and clearly above average.

Question 07

Do you plan to acquire (additional) charging infrastructure for your company over the next two years?

Data basis: approximately n = 200 per country, all respondents

Planned Increase of own Charging Infrastructure in next 2 years (multiple answers possible for wallboxes and charging posts)

DE	IT	FR	NL	ES	PL	CZ	RO	Total	
59%	78%	81%	80%	69%	67%	61%	68%	70%	<input checked="" type="checkbox"/> Yes
34%	33%	39%	31%	30%	25%	32%	22%	31%	Wallboxes
35%	53%	51%	58%	42%	47%	33%	51%	47%	Charging Posts
41%	22%	19%	21%	31%	33%	39%	32%	30%	<input type="checkbox"/> No

Planned Increase (Share "Yes") – relevant subgroups

DE	IT	FR	NL	ES	PL	CZ	RO	Total	
37%	72%	68%	67%	58%	58%	46%	66%	59%	Up to 49 employees
63%	81%	82%	85%	75%	73%	70%	73%	75%	50 to 499 employees
85%	91%	98%	87%	90%	72%	73%	58%	82%	500 employees or more
68%	84%	93%	86%	75%	82%	73%	78%	80%	Transport
47%	79%	77%	80%	64%	48%	64%	50%	65%	Services
50%	75%	82%	83%	64%	68%	66%	48%	69%	Trade
62%	77%	76%	74%	68%	60%	55%	69%	67%	Other

40 – 49 % 50 – 59 % 60 – 69 % 70 – 79 % ≥ 80 %

Where e-fleets charge



47%

Charging at company sites dominates

The company site is the most important charging location

almost half of all electric fleet vehicles are typically charged at company-owned charging points on the premises. Public charging points are the second most important option; home charging plays a smaller but still relevant role.



31%

Public charging is the second most important charging option

Germany closely mirrors the overall picture

in Germany as well, company site charging is clearly the main focus; public charging points form the second pillar, while home charging remains secondary.

Czechia lags significantly in company site charging

compared with other countries, notably fewer electric fleet vehicles in Czechia are charged at company-owned charging points on the premises.

Eastern Europe charges more publicly

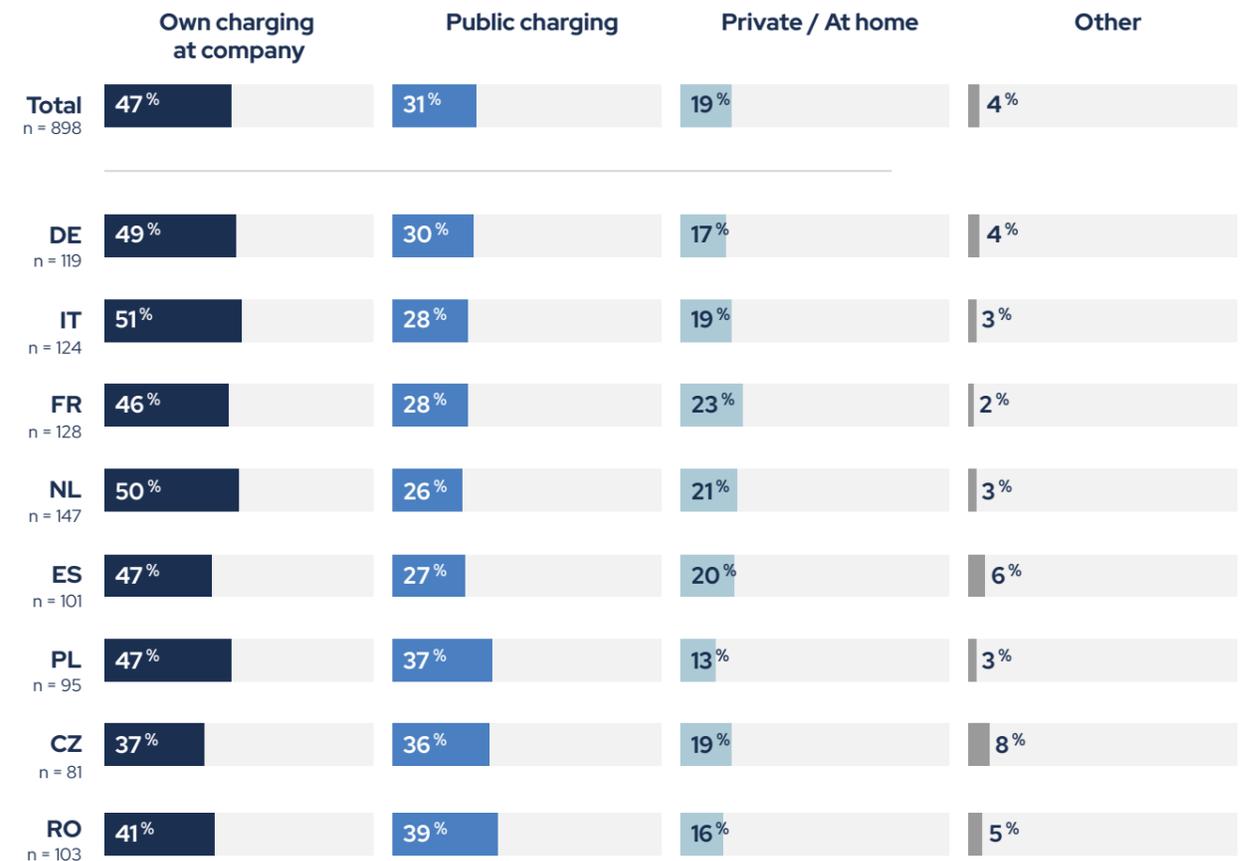
Poland, Czechia and Romania show a noticeably higher share of charging at public stations compared with the remaining countries.

Question 08

Where are the electric vehicles in your fleet typically charged?

Data basis: only companies operating electric vehicles and/or plugin hybrid vehicles

Charging Locations (multiple answers possible)





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