ALPHABET

European Fleet Emission Monitor 2025

Fleet Manager Survey:
Insights and Perspectives

05|2025

Introduction

European Fleet Emission Monitor 2025 by Alphabet

Over the past years, the focus on companies to improve fleet emissions has intensified.

As a result, looking after the environment is no longer an extra perk – it's now essential for businesses to stay competitive in the long run. That's why lots of companies are starting to use new ways of handling their data and are putting in the time and effort to track their ecological footprint more carefully than they used to.

Nonetheless, a remarkable paradox is unfolding. Despite having more fleet data than ever, many companies find themselves unable to translate it into meaningful action. Emission figures are monitored but not mastered. Spreadsheets multiply, but clarity remains elusive. And while digital solutions exist, their full potential often goes untapped. The tools are there – but without proper integration and interpretation, data becomes confusing noise instead of helpful advice.

This is the dilemma of fleet sustainability: more data but less action.

At Alphabet, we believe that true sustainability starts where information meets insight. That means building systems that don't just collect numbers, but connect the dots – enabling smarter, faster decisions that lead to real change. Without this, businesses risk falling behind in an increasingly regulated domain where the cost of inaction is not only environmental, but financial.

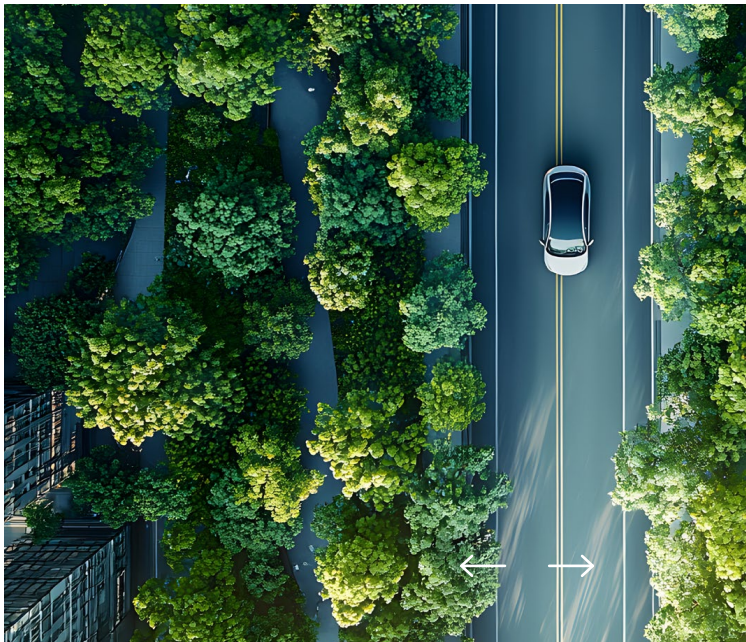
Data should empower, not overwhelm. But that requires investment in digital integration and a commitment to change habits, not just dashboards.

This year's European Fleet Emission Monitor uncovers both the progress and the pitfalls. It's clear that the ambition is there – the challenge now is execution. Turning data into action will define the leaders of tomorrow's mobility landscape. In our latest edition, European insights from over 740 fleet managers across 12 countries and multiple sectors have been collected.

As you read through this report, we invite you to consider: Is your organisation using its fleet data to its full potential – or just adding to the pile? The answer could shape your path to sustainable, future-proof mobility.

With best wishes,

Jesper Lyndberg, CEO Alphabet International



Fleet sustainability: progress stalls on emissions targets

Despite mounting regulatory pressure, the share of companies with concrete CO_2 reduction targets has declined slightly – from 52% last year to just 49% in 2025. The continued downward trend indicates a persistent reluctance among businesses to commit to definite emission goals.

While overall progress remains slow, there are some signs of forward movement: approximately four in ten companies are preparing to define their sustainability objectives more concretely within the next five years, although one in ten anticipate needing more than six years to set or reach such goals – figures that show only marginal improvements over those reported previously. Additionally, the number of fleet managers who see sustainability as an important factor in their overall decision-making process has risen to more than 46% - a considerable increase when compared to last year's 35%.

Selected regional perspectives on sustainability structures

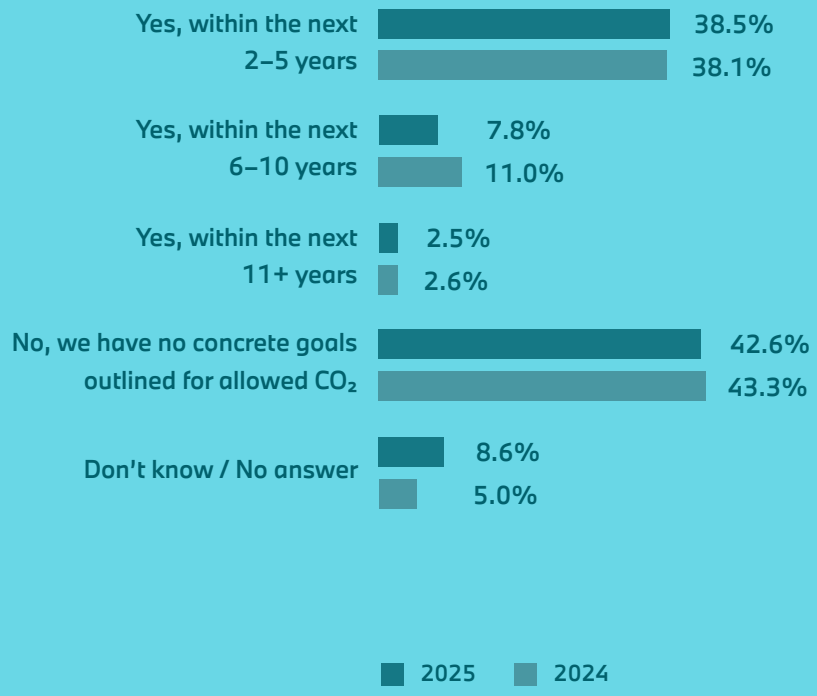
DE Germany takes the lead, with 62% of companies having a dedicated sustainability department in place.

NL The Netherlands follow with 32%, showing a notable level of structural commitment.

ES Spain and FR France trail behind, with 24% and 20% respectively, highlighting greater potential for organisational development in this area.

More tangible momentum can be seen in how sustainability is embedded into company structures. Over one-third of companies have established dedicated sustainability departments in recent years, and an additional 12% are currently in the planning phase for such initiatives – a development that may provide the foundation for more consistent progress in the years ahead.

Has your company already set CO_2 goals for your fleet?



Intentions without insight: one third of fleets still fly blind

Structural changes offer hope for consistent progress, but emissions monitoring shows many companies still fail to turn intent into action, despite growing regulatory pressure. Around 43% of interviewees in Europe have not set any targets, meaning that the threat of stricter regulation has not had the impact that institutions such as the EU had hoped for. With 2025 as the starting point for increased scrutiny and regulatory pressure under frameworks like the Corporate Sustainability Reporting Directive (CSRD), this is hopefully about to change.

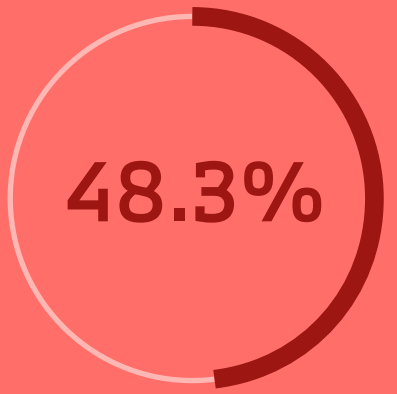
However, the CSRD appears to have had limited influence so far: only 8% of companies say it has impacted their fleet planning, while over half report no influence at all – and more than a third remain unsure.

Another concerning figure from the survey is that around 34% of companies still don't monitor their fleet's CO_2 emissions at all. Though this is a slight increase from last year's report, about a third of companies are blindly heading into regulatory trouble, despite understanding the urgency of reducing their footprint. In fact, 82% of companies see reducing their emissions as critical. However, there has been a notable drop in the number of fleet managers who consider this to be the "most important" aspect, down by a significant 3.2 percentage points.

Together, these findings point to a growing gap between awareness and accountability – one that upcoming regulation may be forced to close.

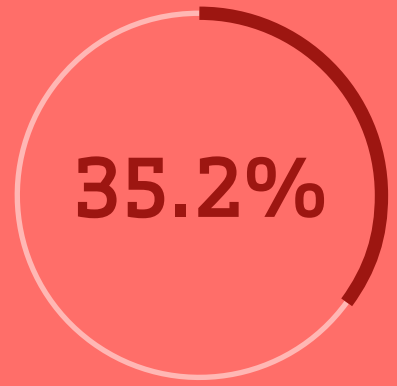
> Incentives and guidelines were introduced to accelerate progress – but their effect has remained limited. As the regulatory environment shifts from encouragement to enforcement, sustainability can no longer be treated as a branding exercise. Those who fail to turn ambition into measurable action will face rising costs, as the 'carrot' is steadily replaced by the 'stick'.
>
> Jesper Lyndberg, CEO Alphabet International

Despite growing regulatory pressure, some countries still show considerable gaps in CO_2 monitoring.



In the NL **Netherlands**, for example, nearly half (48.3%) of companies still don't track their fleet emissions – significantly more than in Germany (20%).

In ES **Spain**, over a third of companies (35.2%) also don't monitor emissions – despite 80% considering CO_2 reduction important. These gaps suggest that while sustainability is often seen as a priority, consistent implementation across Europe remains a work in progress.



Fleet emissions data: progress in tracking, gaps in insight

> Data without direction is no longer good enough. While it's encouraging to see more companies tracking emissions, too many are still working with fragmented tools, outdated methods, and overwhelming volumes of unstructured data. In today's regulatory and financial landscape, the ability to turn data into insight – and insight into action – is what separates the frontrunners from the rest. That's why digitalisation, automation, and intelligent systems like the Alphabet Carbon Manager and the Alphabet AI Assistant are no longer optional; they're essential for staying competitive and compliant in a rapidly evolving mobility environment
>
> Jesper Lyndberg, CEO Alphabet International

The good news is that the number of companies tracking is steadily increasing (43%, +0.9% compared to 2024). However, only around 27% of companies are currently able to accurately quantify their fleet's emissions. This doesn't necessarily mean that data is being collected just for the sake of it, but that companies are not well informed or equipped to deal with the challenges ahead: More and more companies are struggling with data overload (+2.5% compared to 2024), are still relying on fuel-based calculations (42%) or using Excel sheets (26%) for tracking, rather than using more advanced digital solutions. This makes it difficult for fleet managers to gain meaningful, actionable insights.

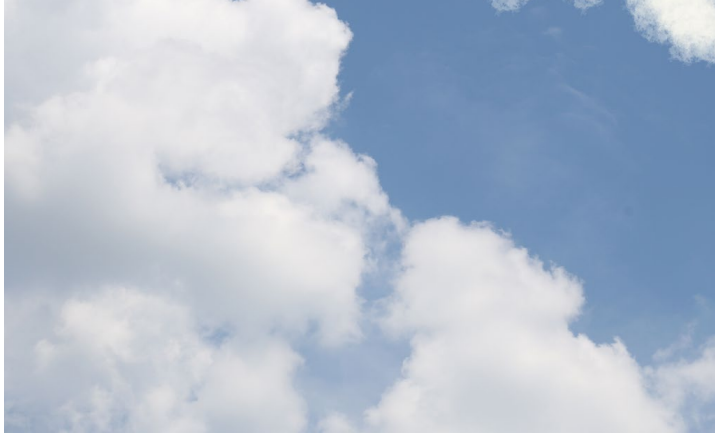
This is a real problem for the industry, as the ability to effectively use existing fleet data will determine which companies stay ahead in the transition to sustainable mobility and, ultimately, which companies can thrive as regulatory and financial pressures mount.

The way out is through new technologies and comprehensive solutions, that provide structure and context to the data collected. Worryingly, the percentage of companies using these tools has remained static since the last survey. And while artificial intelligence holds enormous potential to simplify reporting, automate analysis and reduce administrative burden, adoption remains low: only around 7% of respondents are currently integrating AI into their fleet management practices – with just 3% using it specifically for reporting. This places the sector well behind other industries when it comes to harnessing digital innovation.

Old habits die hard: Excel use still high in some markets

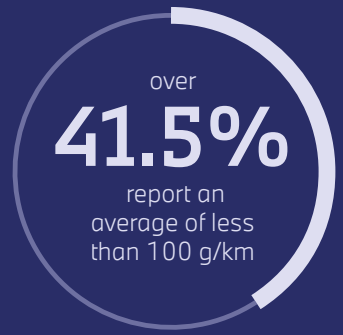
Despite growing pressure to modernise, many companies still rely on outdated tracking methods. In IT Italy, 60% of companies use Excel to monitor fleet emissions – the highest across all markets.

FR France follows with 45%, a sharp rise from last year. In contrast, the NL Netherlands (18%) and BE Belgium (21%) are moving away from Excel, while DE Germany remains unchanged at 26%.

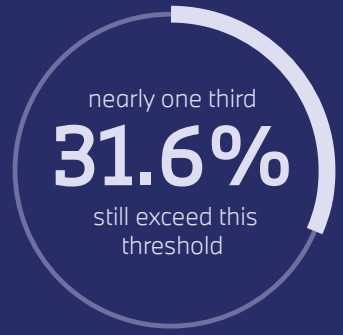


A closer look at current fleet performance

Among companies that already monitor their fleet emissions, over 41.5% report an average of less than 100 g/km – a notable improvement from 34.6% in 2024.



However, nearly one third (31.6%) still exceed this threshold, and 26.6% don't even know their fleet's average CO_2 output.



These figures reflect both growing momentum and persistent blind spots – further underlining the need for smart, integrated tracking systems.

Knowledge gaps undermine progress

> These numbers are again a wake-up call. The ambition to electrify is clearly there, but ambition without clarity won't move fleets forward. When nearly half of fleet managers still feel underinformed, it tells us that as mobility providers, policymakers, and industry leaders, we still have room for improvement. It's not just about offering technology – it's about providing guidance, demystifying complexity, and ensuring every decision-maker has access to the right insights at the right time. The success of the mobility transition depends on our ability to close this knowledge gap and turn uncertainty into confidence
>
> Jesper Lyndberg, CEO Alphabet International

The knowledge gap around e-mobility remains a persistent barrier to progress. Despite years of growing attention and investment in electric vehicle technologies, 43% of fleet managers still feel inadequately informed about developments and opportunities in this space. While this marks only a marginal improvement from last year's 44%, it signals that communication efforts from institutions, policymakers, and mobility providers are not yet sufficient to drive widespread confidence and informed decision-making at the fleet level.

This lack of clarity is reflected in how incentives are perceived and used. Over a quarter are unaware of these opportunities altogether, and fewer than one in three reports having a clear understanding of the full scope of financial support they could access. This reveals a significant disconnect between policy intention and practical uptake – suggesting that incentive frameworks are either poorly communicated, too complex to navigate, or insufficiently integrated into operational decision-making.

Regional perspectives: Who feels left in the dark?

Knowledge gaps around e-mobility remain a challenge across Europe. In ES Spain, nearly 59% of fleet managers feel underinformed – the highest among all surveyed countries. FR France (42%) and DE Germany (39%) also report high levels of uncertainty.

AT Austria shows significant improvement, with knowledge gaps dropping from 36% in 2022 to 17% in 2025. The NL Netherlands has also made progress, but one in three still lack confidence in their e-mobility knowledge.

These gaps show that stronger guidance and communication remain key to enabling the mobility transition.

Are you aware of any governmental subsidies or incentives available to support the electrification of your fleet?

Yes, we are fully aware of the available subsidies/incentives.
29.5%

Yes, we are somewhat aware, but not fully informed about all the options.
31.2%

No, we are not aware of any subsidies/incentives.
25.6%

We are aware, but do not currently qualify for any subsidies/incentives.
7.0%

Don't know / No answer.
6.7%

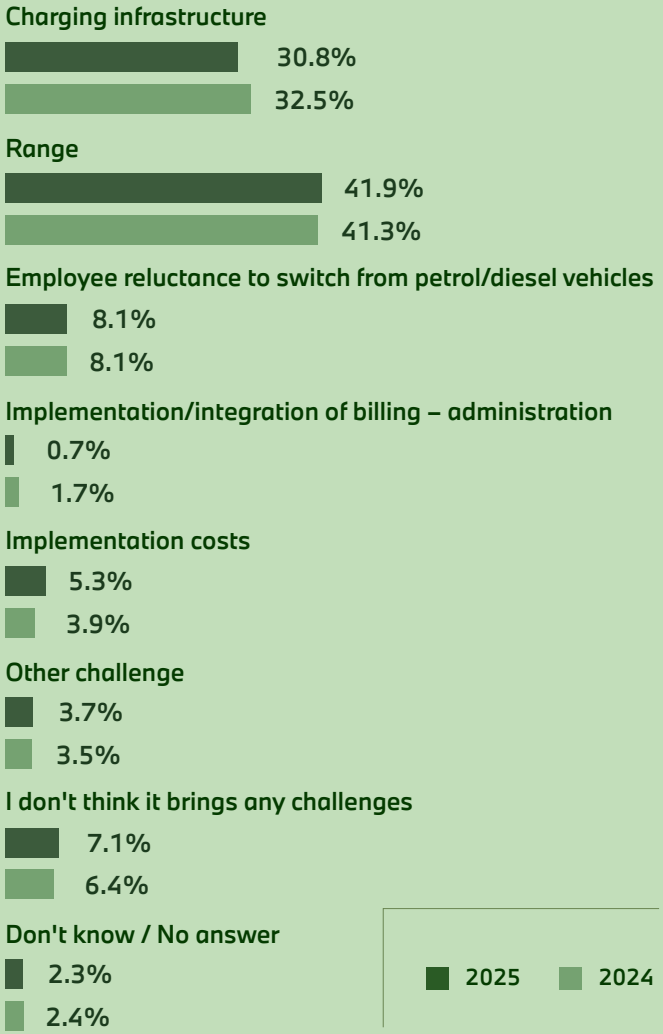
Stuck in first gear: fleet transformation hampered by persistent barriers

Although most fleet managers (56%) still intend to phase out internal combustion engine vehicles in the coming years, this represents a sharp decline from 2023, when 69% expressed similar intentions. The drop points to waning momentum – not necessarily in ambition, but in the perceived feasibility of implementation. Key barriers remain stubbornly consistent: around one-third of fleet managers cite inadequate charging infrastructure as a major obstacle, and 42% express concerns about the limited range of electric vehicles.

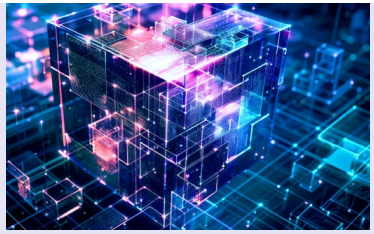
These findings suggest that without tangible improvements in infrastructure, better information access, and tailored consulting, even well-meaning sustainability goals risk losing traction. Bridging this gap between aspiration and action will be essential to keep electrification efforts on track and ensure companies remain aligned with both regulatory demands and long-term environmental targets.

Charging ahead? Electrification intentions across Europe

Fleet electrification plans vary widely between markets. In BE Belgium (78%), the NL Netherlands (72%), and the UK UK (71%), most companies expect to fully electrify their fleets in the future. In contrast, fewer than 40% of respondents in FR France and AT Austria say the same – and in CH Switzerland, just 24%. These differences suggest that national readiness, support, and confidence vary significantly.it a priority.



Key findings



More data, less direction

While more companies are tracking emissions, only 27% can accurately quantify their CO_2 output – showing that data alone isn't enough. Without digital tools and structure, information risks becoming noise.

Digital progress still stalling

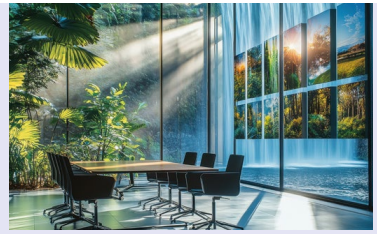
Despite rising pressure, 42% still rely on fuel-based calculations and 26% use Excel – outdated methods that hinder effective fleet management. Just 7% have begun integrating AI.

Knowledge gaps persist – and hold fleets back

Nearly half of fleet managers still feel underinformed about electrification, infrastructure, and available support – a barrier to progress despite high awareness.

Regulation isn't enough on its own

The CSRD has had minimal influence on fleet planning so far, with more than half of companies unaffected and one third unsure of its relevance.



Sustainability remains a structural challenge

One in three companies now have a dedicated sustainability department – an encouraging step, but overall planning remains fragmented across much of Europe.

The cost of delay: why action on fleet emissions can't wait

The European Fleet Emission Monitor 2025 reveals a critical truth: companies are collecting more data and expressing greater awareness of sustainability than ever before – yet decisive action remains the exception rather than the rule. The electrification of fleets, the integration of digital tools and the implementation of concrete CO_2 targets are still lagging behind, held back by uncertainty, outdated systems and insufficient follow-through.

But time is running out – and the price of inaction is rising fast.

As regulatory pressure mounts across Europe, companies that delay investing in fleet electrification and emissions transparency are exposing themselves to significant financial risks. These include penalties for non-compliance, lost subsidies, rising taxes on high-emission vehicles and reputational damage that can affect customer and investor confidence. Operating an emissions-intensive fleet in the years ahead won't just be inefficient – it will be expensive.

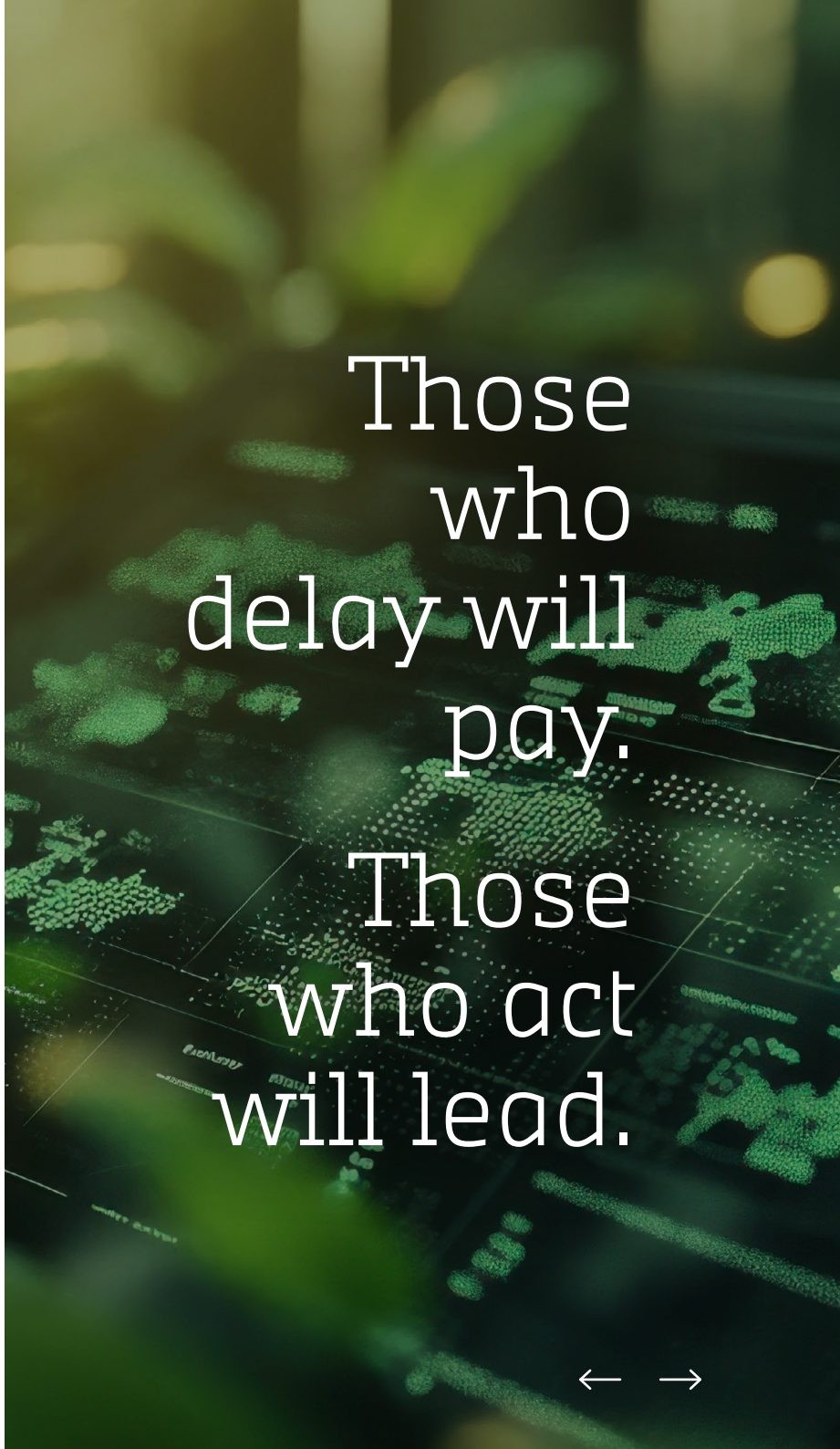
Furthermore, clinging to outdated tools and manual tracking methods leads to inefficiencies that silently drain resources. What may appear to be a short-term cost saving by avoiding the transition to digital fleet management or postponing investment in electric vehicles often results in a higher total cost of ownership in the long run.

On the other hand, companies that invest now – in electrification, integrated data systems and sustainability expertise – will be better positioned to avoid these costs, adapt to tightening regulations and reap the full benefits of operational savings, incentives and strategic resilience.

The way forward is clear. Sustainability is no longer a CSR checkbox – it is a business-critical strategy.

Those who delay will pay.
Those who act will lead.

Let this report serve not only as a mirror of today's challenges, but also as a warning – and a roadmap. The time to act is not sometime in the future. It is now.



Appendix –
comparison results 2024
and 2025

Fleet CO_2 Emissions

How important is it for your company to reduce the CO_2 emissions of your fleet?	Europe 2025	Europe 2024	Annual variation
0 (not important at all)	4.7%	3.4%	1.3%
1	0.8%	1.0%	-0.1%
2	1.9%	1.3%	0.6%
3	2.3%	1.9%	0.4%
4	1.4%	2.0%	-0.6%
5	6.7%	8.5%	-1.8%
6	6.3%	6.2%	0.1%
7	13.7%	12.4%	1.3%
8	21.8%	18.7%	3.1%
9	12.6%	13.3%	-0.7%
10 (the most important)10 (the most important)	27.5%	31.2%	-3.6%

Has your company already set CO_2 goals for your fleet?	Europe 2025	Europe 2024	Annual variation
Yes, we have concrete goals outlined for allowed CO_2 emissions within the next 2-5 years.	38.5%	38.1%	0.4%
Yes, we have concrete goals outlined for allowed CO_2 emissions within the next 6-10 years.	7.8%	11.0%	-3.2%
Yes, we have concrete goals outlined for allowed CO_2 emissions within the next 11+ years.	2.5%	2.6%	-0.1%
No, we have no concrete goals outlined for allowed CO_2 emissions.	42.6%	43.3%	-0.7%
Don't know / No answer.	8.6%	5.0%	3.6%

Do you already monitor the CO_2 emission of your fleet?	Europe 2025	Europe 2024	Annual variation
Yes, we currently monitor the CO_2 emissions of our fleet.	43.3%	42.4%	0.9%
No, we do not currently monitor the CO_2 emissions of our fleet, but plan on implementing.	16.6%	18.9%	-2.3%
No, we do not currently monitor the CO_2 emissions of our fleet.	34.4%	35.2%	-0.8%
Don't know / No answer.	5.8%	3.5%	2.2%

Fleet CO_2 Emissions – Details

How do you monitor the CO_2 emission of your fleet? (Base: those that monitor CO_2 emissions)	Europe 2025	Europe 2024	Annual variation
Fleet management tool documenting all consumption and CO_2 data.	31.0%	31.0%	0%
Record manufacturer data using Excel sheets.	26.3%	24.0%	2.3%
Evaluation of leasing providers.	15.2%	17.4%	-2.2%
Own calculation based on consumption data.	41.8%	44.6%	-2.8%
I don't know / No answer.	6.0%	2.3%	3.8%

Approximately, what is the average CO_2 emission of your fleet? (Base: those that monitor CO_2 emissions)	Europe 2025	Europe 2024	Annual variation
< 50 g/km	19.9%	12.0%	7.9%
51 - 80 g/km	9.5%	9.3%	0.2%
81 - 100 g/km	12.0%	13.3%	-1.3%
101 - 120 g/km	18.0%	19.0%	-1.0%
121 - 130 g/km	6.6%	13.3%	-6.7%
> 130 g/km	7.0%	11.3%	-4.4%
Don't know / No answer.	26.6%	21.9%	4.6%

Sustainability

What role does sustainability play in your company's overall decision-making process?	Europe 2025	Europe 2024	Annual variation
Sustainability is the most important factor of us.	4.8%	5.4%	-0.6%
Sustainability is one of the most important factors among others.	41.9%	41.0%	0.9%
Sustainability is something we are aware of and talk about but don't always take into consideration when making decisions.	37.8%	40.7%	-2.9%
Sustainability is not a very important factor for us.	6.6%	7.0%	-0.4%
We do not consider any sustainability at all when making decisions.	5.2%	4.2%	1.0%
Don't know / No answer.	3.7%	1.7%	2.0%

Are you aware of any governmental subsidies or incentives available to support the electrification of your fleet?	Europe 2025	No data collected	Not applicable
Yes, we have a sustainability department.	36.2%	/	/
No, we do not have a dedicated sustainability department, but plan on creating one.	12.3%	/	/
No, we do not have a dedicated sustainability department and are not planning on creating one.	42.9%	/	/
Don't know / No answer.	8.6%	/	/

What tasks does your sustainability department currently fulfil, or which tasks will it take on in the near future?	Europe 2025	No data collected	Not applicable
Tracking company-wide CO_2 emissions, including fleet emissions.	29.5%	/	/
Setting CO_2 reduction goals.	22.3%	/	/
Managing the transition to electrified vehicles (EVs).	13.0%	/	/
Evaluating and implementing sustainability initiatives across different company departments.	26.4%	/	/
Other tasks (please specify)	1.5%	/	/
Don't know / No answer.	5.3%	/	/

What role does sustainability play in your fleet planning?	Europe 2025	Europe 2024	Annual variation
It plays a big role in our fleet planning.	21.6%	24.8%	-3.2%
It plays a part in our fleet planning.	38.1%	38.8%	-0.7%
It does not currently play a role in our fleet planning, but we want to change that going forward.	22.1%	23.4%	-1.3%
It does not currently play a role in our fleet planning, and this is unlikely to change in the future.	14.2%	10.5%	3.7%
Don't know / No answer.	4.0%	2.4%	1.6%

Has the EU's Corporate Sustainability Reporting Directive (CSRD) influenced the importance of sustainability in your fleet planning?	Europe 2025	Europe 2024	Annual variation
If yes, how? (please describe)	8.3%	8.9%	-0.6%
No, it has not.	56.2%	55.5%	0.7%
Don't know / No answer.	35.5%	35.6%	-0.1%

Electrification

An important sustainability factor for fleets is its electrification. How well informed do you currently feel about e-mobility (e.g., vehicles and ranges, charging infrastructure and billing, grants and allowances, etc.)?	Europe 2025	Europe 2024	Annual variation
I feel very well-informed.	17.9%	18.4%	-0.5%
I feel well-informed.	37.1%	36.0%	1.2%
I feel partially informed.	28.4%	31.1%	-2.7%
I feel misinformed.	8.9%	8.8%	0.1%
I don't feel informed at all.	5.3%	4.0%	1.3%
Don't know / No answer.	2.3%	1.7%	0.6%

Do you see your fleet made up of electrified vehicles (EVs) in the future?	Europe 2025	Europe 2024	Annual variation
Yes, we will not have any petrol/diesel vehicles within the next 2 years.	6.8%	8.6%	-1.8%
Yes, we will not have any petrol/diesel vehicles within the next 3 - 5 years.	18.2%	20.4%	-2.2%
Yes, we will not have any petrol/diesel vehicles within the next 6 - 10 years.	20.3%	23.0%	-2.7%
Yes, we will not have any petrol/diesel vehicles in the next 11+ years.	10.7%	10.4%	0.3%
No, our fleet will always contain petrol/diesel vehicles.	27.3%	25.1%	2.1%
We have already transitioned to EVs.	5.9%	3.8%	2.1%
Don't know / No answer.	10.8%	8.6%	2.2%

What, in your opinion, is the biggest challenge faced when electrifying a fleet?	Europe 2025	Europe 2024	Annual variation
Charging infrastructure.	30.8%	32.5%	-1.7%
Range.	41.9%	41.3%	0.6%
Employee reluctance to switch from petrol/diesel vehicles.	8.1%	8.1%	-0.1%
Implementation/ integration of billing – administration.	0.7%	1.7%	-1.0%
Implementation costs.	5.3%	3.9%	1.4%
I don't think it brings any challenges.	3.7%	3.5%	0.2%
Other challenge (please describe).	7.1%	6.4%	0.7%
Don't know / No answer.	2.3%	2.4%	-0.1%

Digital Transformation

In your experience, what are the most significant digitalisation challenges you face in day-to-day fleet management?	Europe 2025	Europe 2024	Annual variation
Integrating multiple digital tools and platforms.	36.4%	37.1%	-0.7%
Data overload and analysis.	29.3%	26.8%	2.5%
Real-time communication and coordination.	13.6%	12.4%	1.2%
Adapting to new technologies.	11.5%	13.3%	-1.8%
Cybersecurity and data privacy.	17.7%	18.8%	-1.1%
Mobile accessibility and remote fleet management.	11.5%	8.5%	3%
Customisation and scalability.	7.8%	7.8%	0%
Regulatory compliance and reporting.	16.2%	12.1%	4.1%
Don't know / No answer.	25.6%	21.3%	4.3%

Is artificial intelligence (AI) currently being integrated into your fleet management practices?	Europe 2025	Europe 2024	Annual variation
Yes, in claims management.		1.0%	-0.2%
Yes, in risk management and safety.	0.7%	0.8%	-0.1%
Yes, in billing and cost management.	1.8%	1.5%	0.2%
Yes, in fuel management.	0.4%	1.2%	-0.7%
Yes, in driver behaviour monitoring.	0.7%	0.8%	-0.1%
Yes, in route optimisation.	2.3%	1.9%	0.4%
Yes, in predictive maintenance.	0.7%	0.9%	-0.2%
Yes, in fleet reporting.	3.3%	/	/
No.	84.7%	85.9%	-1.2%
Don't know / No answer.	8.2%	7.9%	0.4%