FLEET AND MOBILITY BAROMETER 2025

COUNTRY REPORT

Arval Mobility Observatory

Ipsos

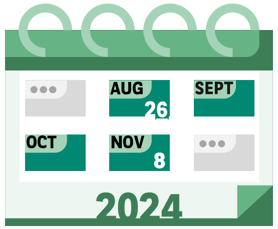
AGENDA

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

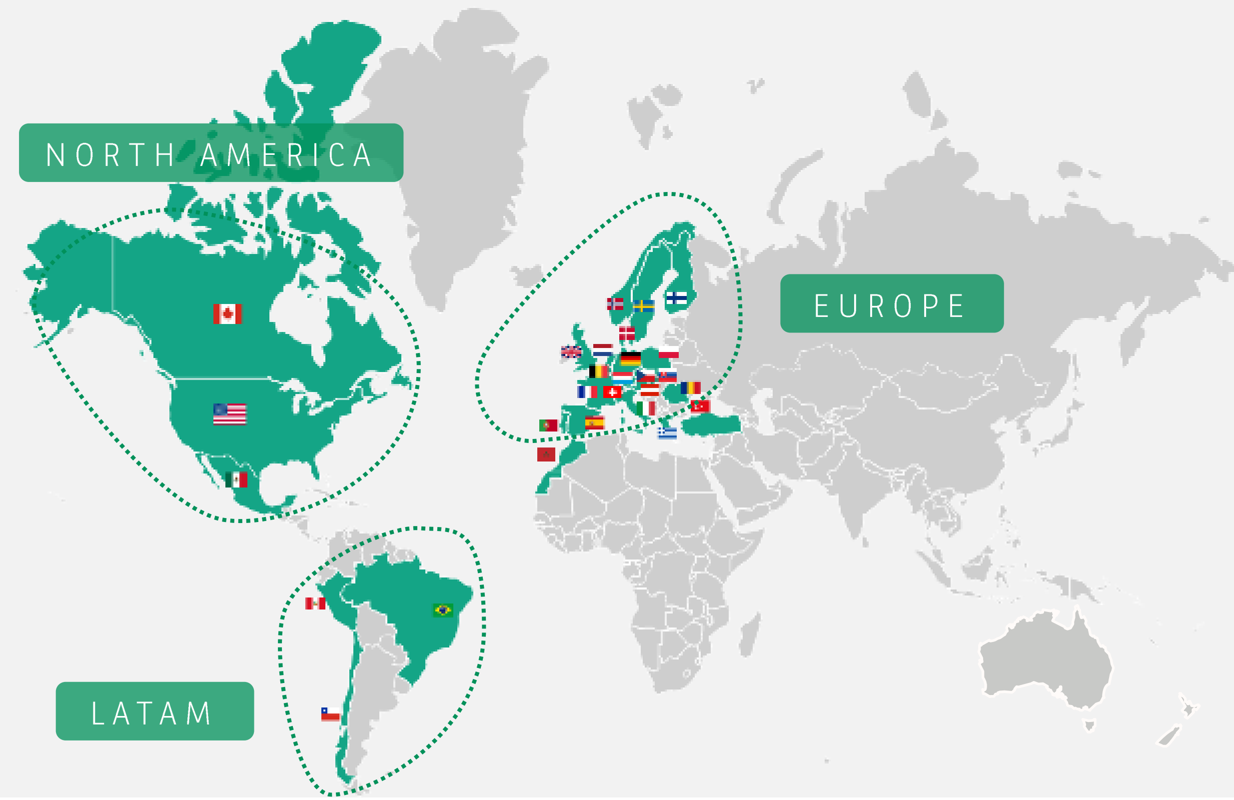
1. What short term shifts are shaping the market?
2. What kind of vehicles will the market expect in 3 years?
3. How do mobility solutions impact corporate mobility?

SAMPLE STRUCTURE AND SCOPE

QUOTAS ON COMPANY SIZE & INDUSTRY

COMPANY SIZE & SECTOR	Small companies	Medium companies	Large companies	TOTAL
Number of employees	1-99	100 to 249 /499/999	250/500 /1,000 +	
CONSTRUCTION	14%	9%	11%	12%
INDUSTRY	17%	17%	15%	17%
SERVICES	32%	41%	40%	36%
TRADE	37%	32%	34%	35%
Weight of company size segment	53%	27%	20%	
Number of interviews	160	81	59	300

28 COUNTRIES – 3 REGIONAL BENCHMARKS



Morrocco and Turkey : compared with Europe benchmark

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

92% anticipate their fleet will either remain stable or grow in the next 3 years (with 44% expecting growth, far above the European average, driven by business development)

68% include second-hand vehicles, more so for LCVs than for Passenger cars, mainly used as pool cars but also for benefit drivers

GROWTH POTENTIAL FOR OPERATIONAL LEASING IN GREECE REMAINS STRONG

49% are considering either introducing operational leasing or further increasing it in the next 3 years (stable vs 2024)

23% report operational leasing is their current primary financing method

NO SIGNIFICANT CHANGE IN THE PACE OF FLEET ELECTRIFICATION, STILL BELOW THE EUROPEAN AVERAGE

62% have already implemented electrified technologies or are considering to do so for their passenger car fleets (with 42% already using electrified vehicles)

73% consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars, while **87%** have or plan to implement a charging strategy

A CONFIRMED CONNECTIVITY SAY-DO GAP: STABLE EQUIPMENT, BUT ABOVE ALL STILL LIMITED USE OF TELEMATICS DATA

37% have adopted telematics tools (for passenger cars, LCVs or both, stable and in line with the European average)

49% equipped use or consider using telematics data, with only 15% already using it to date

A SIGNIFICANT COMMITMENT TO EMPLOYEE MOBILITY BY GREEK COMPANIES, DRIVEN BY CSR POLICIES

39% have already implemented car sharing or are considering to do so, confirming its position as one of the most attractive mobility options for companies in Greece

48% to **51%** quote compliance with CSR among their key motivations to implement mobility solutions and policies.

A STRONG COMMITMENT TO DECARBONIZATION, BUT A PERSISTING CHALLENGE TO ELECTRIFY FLEETS

22% have set targeted decarbonization goals to date (with 28% currently evaluating such goals), well above the European average

29% quote the implementation of alternative energy technologies among their main challenges for the next 3 years, closely followed by mitigating the increase of TCO (25%) and inducing more responsible driving (25%)

01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?

FLEET CHARACTERISTICS KEY INSIGHTS

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

92% of companies anticipate that their fleets will either remain stable or grow over the next three years (rather steady for the past two years and consistent with the European average), with **44%** expecting growth (still far above the 24% European average), showing a high level of confidence.

This trend is consistent across vehicle types (passenger cars and light commercial vehicles), but Large companies seem more optimistic this year, especially for passenger cars.

Fleet growth remains primarily driven by business development

72% of Greek companies expecting fleet growth quote business development as the primary reason, consistently with the European trend.

HR-related needs (**51%**) remain a strong driver for fleet growth, slightly above the European benchmark, followed by plans to offer shared vehicles (**33%**) and plans to offer vehicles to employees previously ineligible for company cars (**26%**).

Greece remains well above the European average for the use of second-hand vehicles

68% of Greek companies already include second-hand vehicles (39% at European level), and an additional **25%** are considering doing so in the next 3 years.

This trend is slightly stronger in Medium companies, and penetration of second-hand vehicles is much higher for LCVs (51%) than for Passenger cars (34%) – a Greek specificity compared to other markets.

Second-hand passenger cars are mainly used as pool cars (64%), but also for benefit drivers (49%), once again a pattern more specific to Greece.

02

FINANCING METHODS

How do companies finance their fleets?

Operational leasing / Full-service leasing remains ahead of Financial leasing as the main financing method for Greek companies

23% use Operational leasing as main financing method for their fleets (following a slight downward trend since 2023), below Outright purchase (48%, up 10 points vs 2023) but ahead of Financial leasing (17%, down 6 points vs 2023).

The penetration rate of Operational leasing remains slightly below the European average (27%) but is rather consistent across company sizes, still slightly more used for Passenger cars (26%) than for LCVs (19%).

The growth potential for Operational leasing remains strong and consistent across company sizes

49% of Greek companies are considering either introducing full-service leasing or expanding it (stable vs 2024), above the European average (36%).

Large companies are slightly more likely than smaller companies to adopt or expand full-service leasing.

The choice of an Operational leasing provider remains primarily driven by competitiveness and service care

88% of companies quote competitiveness among their choice criteria, followed by service care (82%), reputation (79%) and expert advice (75%), while digital capacity (54%) remains more secondary.

03

ENERGY MIX

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

ENERGY MIX KEY INSIGHTS

Electrification of passenger car fleets in Greece still lags behind European average

For 2025, **42%** of Greek companies have implemented at least one electrified technology (HEV, PHEV or 100% BEV) for passenger cars, showing no acceleration vs 2024 and still behind the European average (56%). When adding consideration for the next 3 years, this figure rises to 62% in Greece.
Medium and Large companies are still ahead in terms of electrification.

HEV and PHEV remain the predominant technologies for Greek passenger cars fleets' transition

With respectively **23%** and **22%** of penetration among Greek fleets, HEV and PHEV remain ahead, while BEV (**8%,** down 6 points) tends to drop off for 2025, in line a European trend.

Compliance with CSR policy and environmental considerations are now catching up with economic considerations in terms of motivations for passenger cars electrification

45% of Greek companies quote compliance with the company's CSR policy among their drivers for fleet electrification, significantly increasing vs 2024 and far above the European average (29%), now on par with Reduction in fuel expenses (45%), lower TCO (44%), and lower environmental impact (43%).
Improving corporate image and tax benefits are following closely (35%).

The shift to electrified LCVs remains more challenging

If the adoption of alternative energy technologies for LCV fleets remains quite stable over the past two years (**3%** for 2025), the total for current use and consideration for the next 3 years tends to fall back (18%), especially in Medium companies. This downward trend is quite in line with the European average (26%), even though Greece remains behind in terms of adoption.
In detail, both BEV adoption (3%) and consideration (15%) remain steady, at a low level.

Overall, the main obstacle to wider fleet electrification remains access to charging infrastructure

73% to **75%** of Greek companies mention charging points limitations as a constraint for using electric passenger cars and LCVs, even higher than the European average (66/64%).

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

87% have or plan to implement a charging policy, in line with the European average. Surprisingly, Large companies (75%) seem to be taking a more wait-and-see approach than smaller ones.

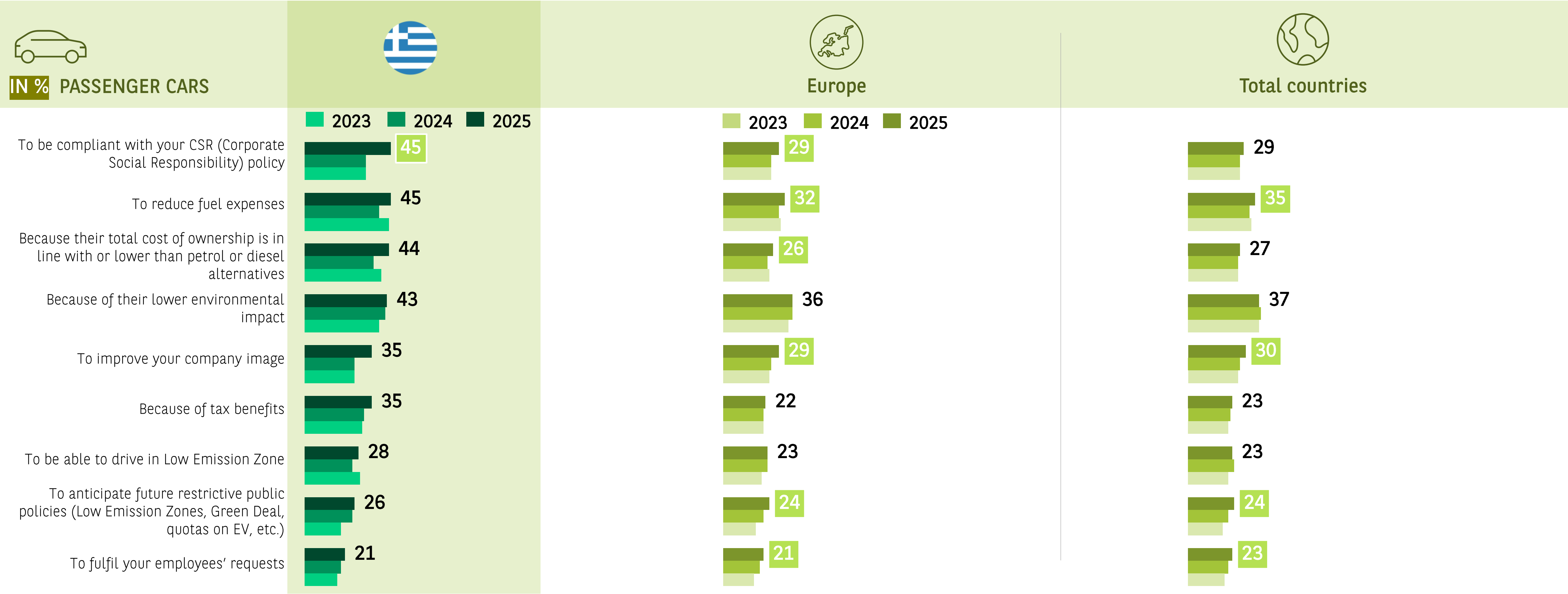
Company premises charging is a current or future strategy for **52%** of companies, with among them 52% having installed or considering installing charging points in the next 12 months, and 63% requiring or planning to require employee payment for charging at the company's premises.

Home charging is a strategy for **43%** of companies, of which 44% support or plan to support home charger installation, with 98% covering or planning to cover at least part of the box and installation costs, and 56% reimbursing or planning to reimburse some energy costs.

Public charging is part of the strategy for **47%** of companies, of which 48% support charging costs (30% via expense claim and 18% via energy cards), while 52% do not reimburse energy costs.

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?
In Greece in 2025, 45% of the companies with passenger cars are already using alternative energy technologies or are considering it to be compliant with their CSR (Corporate Social Responsibility) policy.



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

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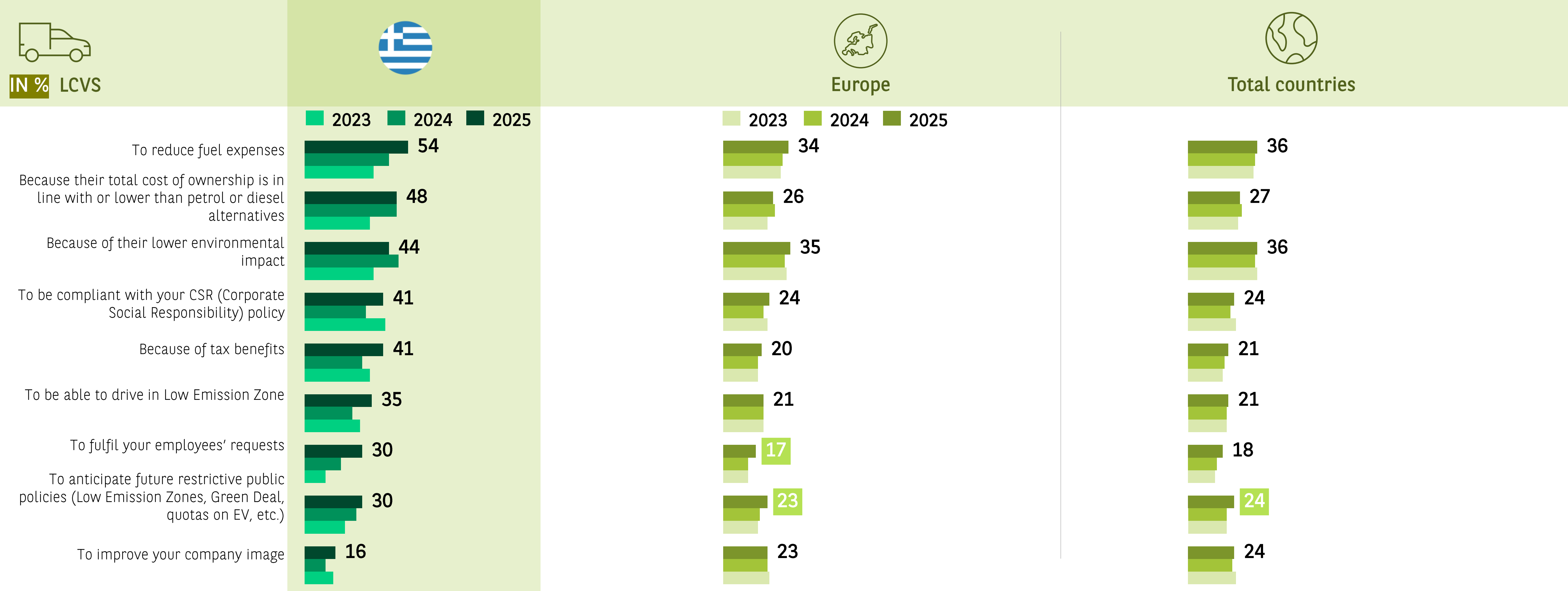
REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR LCVS

HOW TO READ THE RESULTS ?

In Greece in 2025, 54% of the companies with LCVs are already using alternative energy technologies or are considering it To reduce fuel expenses.



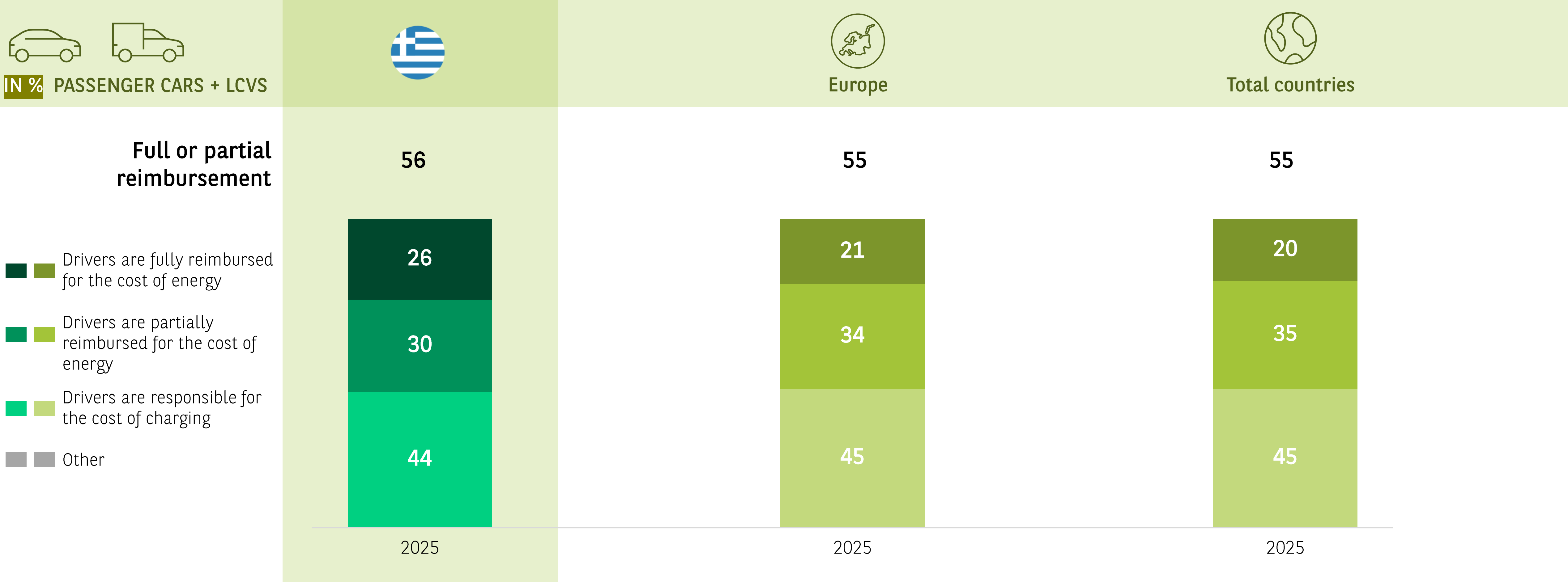
E28A. Why have you already implemented or why do you consider implementing these energy technologies?
Basis: companies that are already using or considering using alternative energy technologies for LCVs

X% Significantly higher / lower vs. previous wave

SUPPORT OF ENERGY COST OF HOME CHARGING POINTS

New question

HOW TO READ THE RESULTS ?
In Greece in 2025, 26% 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

04

CONNECTED FLEETS

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

Telematics adoption in Greek fleets remains stable for 2025, in line with the European average

37% of companies have adopted connected vehicles, vs 38% for the European average.

21% have connected passenger cars and 24% have connected LCVs. Both figures remain stable compared to 2024, Large companies seemingly slightly more equipped.

But like last year, the gap between telematics equipment and actual data use remains very significant, with yet some potential for development

Only **15%** of equipped companies report using Telematics data, consistent with last year and in line with the European average.

And the interest in leveraging this data is high, with **49%** of companies considering using it in the near future.

05

EMPLOYEE MOBILITY

What are the perspectives in terms of mobility policies and solutions?

EMPLOYEE MOBILITY KEY INSIGHTS

A good commitment to employee mobility by Greek companies for 2025

78% of Greek 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.
Greek companies are aligned with the European benchmark for policies (78% vs 77%) and solutions (63% vs 58%).

Three mobility policies/solutions are standing out: car sharing, public transport reimbursement and mobility budget

39% of Greek companies offer car sharing or consider doing so, **36%** for public transport reimbursement, and **34%** for mobility budget.

Mobility policies and solutions implementation are primarily motivated by CSR policies, HR-related needs, and company attractiveness

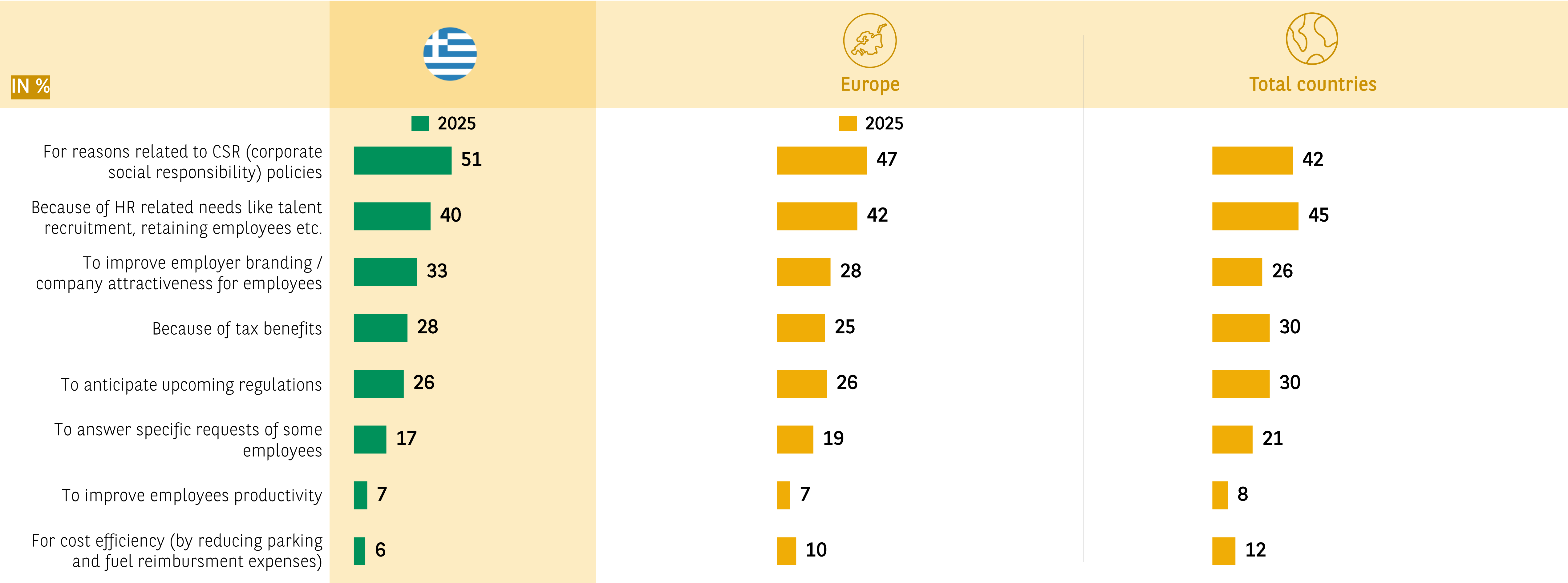
In detail, Compliance with CSR policies (**48%** for Mobility policies, **51%** for Mobility solutions) is quoted as the main driver, ahead of HR-related needs (**35%** to **40%**) and the need to improve employer branding / company attractiveness for employees (**38% to 33%**).

Lastly, perspectives for homeworking remain stable, with 22% of companies claiming they would be ready to introduce or increase homeworking for their employees

New question

HOW TO READ THE RESULTS ?

In Greece in 2025, 51% of the companies declare that the main reason for introducing mobility solutions is: For reasons related to CSR (corporate social responsibility) policies.



MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions?
Basis: companies using or considering at least one mobility solution

6

FUTURE CHALLENGES

What are the future challenges for fleet management in the coming years?

Greek companies significantly committed to decarbonization strategies

22% already have targeted decarbonization goals, and **28%** are currently evaluating such goals, showing a growing awareness of corporate decarbonization – significantly above the European average (13% with decarbonization goals), while Medium companies (29%) seem to be more advanced than Large (22%) and Small companies (19%).

A rather significant weight of employee mobility in these decarbonization strategies: among those with decarbonization targets, **18%** consider employee mobility as significant contributor to their decarbonization target, while 46% consider it a moderate contributor.

In terms of future fleet challenges, fleet electrification remains high on the agenda, although the weight of restrictive public policies on ICE appear to be less of a concern

Implementing alternative energy technologies (**29%**) remains the #1 challenge, closely followed by mitigating the increase of TCO (**25%**), inducing more responsible driving (**25%**), while adaptation to restrictive public policies on ICE (**24%**) tends to drop vs 2024. Other challenges are close and relatively stable compared to the previous year, except adaptation to new ways of working (**19%**) which is dropping too.

THANK YOU

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