LEMAN

The LEMAN Global Sustainable Logistics Report 2025

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Foreword

Sandhya Menon

The past two years have been a test for sustainability ambitions worldwide.

In 2024 and 2025, a more conservative climate policy in many regions has led to rollbacks or delays in environmental regulation. In the EU, implementation of the Corporate Sustainability Reporting Directive (CSRD) has faced resistance, while in the US, parts of the Inflation Reduction Act (IRA) have been reinterpreted or slowed. Across markets, companies that had pledged bold climate action are recalibrating or, in some cases, stepping back.

Yet the story is not one of retreat alone. The Science Based Targets initiative (SBTi) has continued to expand its reach, with thousands of companies now committed to verified emission-reduction pathways. Progress in some sectors remains strong, and in logistics, the stakes are especially high. Decarbonized transport cannot be achieved in isolation – no single company or node in the supply chain can deliver it alone. Every withdrawal slows the system; every contribution accelerates the whole.

At the same time, global economic pressures have reshaped priorities. Rising tariffs, shifting trade routes, and cost-conscious procurement strategies have sharpened the focus on immediate savings. For some, this has meant deferring sustainability investments; for others, finding efficiencies that advance both climate and cost goals.

In this context, we launched our global survey on sustainable logistics. Our aim: to take the pulse of the industry at a moment of uncertainty and opportunity. We set out to understand where our sector stands today, where it is moving, and how perspectives differ across the regions in which we operate. The findings reflect the views of those at the heart of the transition – companies that use logistics services – offering data-based evidence of willingness, attitudes, and concrete actions towards decarbonized logistics.

Our commitment to this work is rooted in our own mission: logistics is our domain, and sustainability is integral to its future. This report would not have been possible without the dedication of our commercial teams, who champion sustainable solutions on every route and with every customer. We are equally grateful to Sofia Pyrgioti and Alex Munck, whose editorial skill in text and visuals brought clarity and precision to the presentation of our findings. ■

Methodology

This study was conducted by LEMAN to assess the importance, motivations, and initiatives related to sustainability among companies procuring logistics services. The survey was conducted over a one-month period in the spring of 2025.
An online questionnaire was distributed via email invitation directly to LEMAN customers in Denmark, Finland, Norway, Sweden, Switzerland, the United States, and the United Kingdom. A total of 178 customers participated, representing a response rate of 28%. Responses were collected anonymously to encourage openness and candor.

The questionnaire covered:

- Self-reported significance of sustainability in logistics decisions
- Externally validated commitments to sustainability (e.g., recognized frameworks and certifications)
- Drivers and targeted outcomes of implementing eco-friendly solutions
- Internal financial commitment, including the presence of dedicated budgets
- Governance structures for sustainable logistics
- Interest in transport modes and modal shift opportunities
- Preferences for existing sustainable solutions

Results reflect the perspectives of respondents within the LEMAN customer base and should be interpreted in that context. As with any survey based on self-reporting, responses capture stated attitudes and actions, which may not always correspond directly to actual operational behavior.■

Authorship and Acknowledgements

Sandya Menon is the Group Sustainability Advisor at LEMAN Group and main author of this report. Sandhya has an educational and professional background in sustainability, environmental policy, and business administration and has applied it for over a decade in consulting, procurement, and logistics.

Sofia Pyrgioti, MSc, is the Digital Communications Specialist at LEMAN Group and has served as an editor of this report. She spent the first years of her career in digital and print media and continued the next 8 years in marketing and communications within the fields of technology and sustainability.

Alexander Munck is the Graphic Designer at LEMAN Group and the principal designer of this report. Alexander has worked as a designer for 10 years, with extensive experience in commercial art before joining LEMAN to lead visual communications.

Executive Summary

The 2025 LEMAN Global Sustainable Logistics Survey confirms that sustainability is firmly embedded in logistics decision-making across industries and regions, though the depth of commitment varies widely.

Across markets, sustainability is almost universally acknowledged as important. Yet only Switzerland and the pharmaceutical sector consistently elevate it above cost considerations, with most other respondents treating it as a factor to balance rather than a decisive driver. Sweden and the UK exemplify this pragmatism, where sustainability is embedded but rarely singled out as paramount.

When it comes to commitments, ambitions are uneven. Pharma and Denmark are frontrunners in adopting externally validated Science Based Targets, while Sweden and Switzerland favor internally defined goals, and Norway shows sharp polarization between leaders and laggards. Finland, and the UK mirror global averages, with many companies exploring commitments but not yet translating ambition into SBTi validation.
Drivers of eco solutions reflect both common ground and local nuance. Carbon footprint reduction is the universal anchor, but secondary motivators diverge: customer expectations dominate in Denmark and Norway, brand reputation in Finland, regulatory compliance in the UK and pharma, and intrinsic commitment in Switzerland.

The greatest gap lies in fiscal commitment. With the exception of pharma, almost no respondents allocate dedicated budgets to sustainable transport. Most are in exploratory mode or defer to cost as the primary deciding factor. This gap underscores a structural barrier: While sustainability is prioritized in rhetoric, financial resources remain scarce.

Decision-making structures amplify this tension. In most markets, logistics and procurement teams hold the mandate – functions that are cost-driven and risk-averse. Only Switzerland delegates responsibility primarily to ESG teams, embedding sustainability as a core decision factor. Where senior management is involved, as in Sweden and the UK, fiscal follow-through is often missing.

Modal interest reflects national contexts: Road dominates in most markets, sea is prioritized in maritime nations such as Norway and Finland, and air draws focus in pharma and

the UK due to the profile of high-value exports. Solution preferences also align with visibility and relatability: EV freight leads globally despite higher costs, while carbon offsets have lost credibility across markets, with little to no support.

Taken together, the findings paint a picture of maturity in discourse but hesitation in execution. Customers demand sustainable logistics, yet few dedicate resources or mandate systemic adoption. The strongest lever for acceleration remains supply chain collaboration – where large, sustainability-committed companies can create ripple effects by extending their mandates and budgets to logistics partners.

Strategic outlook

For LEMAN, the opportunity is clear. By aligning eco solutions with customer maturity levels, we can bridge the gap between ambition and action. Where ESG teams hold the mandate, we must deliver advanced solutions with measurable impacts. Where procurement dominates, we must prove that eco solutions deliver cost and efficiency alongside emissions reductions. And where ambition outpaces budget, we can play the role of enabler – helping customers move from exploration to execution through practical, scalable offerings.

Sustainable logistics is no longer a niche choice but a license to operate. Those who embed it deeply into strategy, governance, and fiscal structures will define the future of global supply chains.

Section 1

Analysis and International Comparison

This section provides a comparative analysis of survey results across all participating countries and the pharma segment. It first examines each survey theme across countries, then correlates findings between themes to uncover broader trends and tensions. The analysis aims to highlight both convergence – where priorities are shared globally – and divergence – where national context, geography, or industry sector shape distinct approaches.

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Across-Countries Comparative Analysis

1. Self-Reported Importance of Sustainability

Respondents across all markets acknowledged sustainability as a factor in logistics decision-making. However, the intensity of that prioritization varies significantly.

Switzerland stands out as the frontrunner. Forty percent of respondents said sustainability is very important and prioritized above cost – nearly three times the global benchmark of 14%. An additional 20% ranked it on par with cost and efficiency, while none dismissed it. Switzerland therefore sits at the top of self-reported importance, reflecting a market where sustainability is deeply integrated into corporate identity and stakeholder expectations.

Pharma customers showed similarly strong commitment. Almost one-third said sustainability was very important in logistics decisions, double the global average, while the remainder placed it on equal footing with cost and efficiency. None reported that sustainability was unimportant, underlining the sector's sensitivity to environmental considerations and its heavily regulated context.

Denmark and **Finland** demonstrated broad penetration but with more nuance. In Denmark, 17% reported sustainability as very important and half as important, though one-third said it was only somewhat important. Finland displayed even stronger alignment: three-quarters reported sustainability as important, 12% as very important, and no respondents dismissed it.

Norway largely mirrored the global benchmark. Twelve percent rated sustainability very important and 50% important. Yet a quarter of respondents placed it in the "not important" categories, a surprising finding given Norway's strong policy environment and generous incentives for sustainable practices.

Sweden presented a distinct profile. Not a single respondent said sustainability was very important. Instead, 55% rated it as important and 36% as somewhat important. Nine percent dismissed it entirely. This indicates broad acknowledgment of sustainability, but a reluctance to elevate it above cost and efficiency.

The UK displayed a pragmatic middle-ground. Eighty percent said

sustainability was important and 20% somewhat important, with no respondents at either extreme. This suggests that sustainability is widely recognized but treated as one of several competing priorities, not as a decisive differentiator.

Taken together, the results reveal three groups: **leaders** (Switzerland, Pharma), **mainstream adopters** (Denmark, Finland, UK), and **pragmatic or cautious markets** (Norway, Sweden). Across all, sustainability is on the agenda, but the strength of prioritization differs, often reflecting national context.

2. Commitment to Sustainability (SBTi and Targets)

While importance is widely acknowledged, commitment to externally validated climate targets paints a more complex picture.

Pharma customers lead by a wide margin. Seventy-one percent are engaged in SBTi, with 57% already holding approved targets and 14% in the process of setting them. The remaining 29% have internal sustainability goals. None reported lacking targets altogether. This reflects the sector's regulatory intensity and the pressure from global pharmaceutical supply chains to align with science-based pathways.

Sweden demonstrates high intrinsic ambition. Seventy-three percent of respondents have internal sustainability goals, and 9% have approved SBTi targets. Eighteen percent report no sustainability goals. This positions Sweden as a market where internal validation is becoming a standard, and externally approved targets remain a minority.

Switzerland presents a paradox. Despite ranking highest in self-reported importance, no respondents are engaged with SBTi. Instead, all rely on internal sustainability goals. This suggests Swiss companies may prefer investor-aligned reporting frameworks or in-house metrics over SBTi validation, prioritizing flexibility and alignment with financial market expectations.

Denmark slightly mirrors the global benchmark, with 33% of respondents engaged in SBTi (either approved or in progress). The remainder split between internal goals (50%) and no targets (17%).

Norway reveals a polarized profile. Thirty-seven percent of respondents are involved with SBTi, higher than the global average. Yet 25% report no targets at all, also higher than average. This suggests a dual-track landscape of frontrunners and laggards within the Norwegian market.

Finland sits between Denmark and Norway, with one-fourth engaged in SBTi and the rest evenly split between internal goals and no targets.

The UK displays moderate engagement, broadly similar to Denmark, with most respondents pursuing internal goals.

The contrast is striking: **Pharma and Denmark** emerge as leaders in validated commitments, **Switzerland** focuses internally, and **Norway** illustrates both ambition and inertia.

3. Drivers for Sustainable Logistics

Drivers show both universality and national nuance. Globally, reducing carbon footprint (35%) and meeting customer expectations (28%) are the dominant motivators, with regulatory compliance (20%) and brand reputation (17%) trailing.

Switzerland diverges strongly. Seventy-one percent cite carbon footprint reduction and 29% regulatory compliance. No respondents list customer expectations or brand reputation. This reflects an intrinsic, outcomes-driven approach rooted in environmental performance rather than external narratives.

Sweden also leans heavily on carbon footprint reduction, with 44% of respondents citing it as the main driver. Customer expectations (17%) are significantly below the global average, reflecting a mature discourse where climate targets are expected but not necessarily framed through downstream pressure.

Norway balances between carbon footprint (37%) and customer expectations (37%). This highlights the influence of downstream value chains in an export-oriented economy, where international customers exert direct pressure.

Denmark records higher-than-average emphasis on customer expectations (35%). This suggests a collaborative mindset, where supply chain influence is a recognized lever for sustainable logistics.

Finland shows a more even spread, with elevated attention to brand reputation (25%). This reflects consumer sensitivity to sustainability and the reputational stakes for companies in Finland.

UK respondents align with the global average, but with slightly more weight on reducing the carbon footprint. This is consistent with the UK's disclosure-heavy environment, where corporate carbon footprint is a key metric in national climate-related financial disclosures.

Pharma respondents align broadly with global patterns, though with stronger weight on compliance and reputation, consistent with the sector's regulatory environment and brand-critical profile.
Overall, **carbon footprint reduction is the universal anchor**. The variation lies in the secondary drivers: customer pressure (Denmark, Norway),

compliance (UK, Pharma), reputation (Finland), or intrinsic commitment (Switzerland).

4. Fiscal Commitment

Fiscal commitment is where ambition weakens most. Globally, only 6% of respondents report dedicated budgets for sustainable logistics.

Pharma leads with 14% having dedicated budgets and the remainder exploring. None said cost is the primary factor, indicating stronger fiscal seriousness in line with the sector's high regulatory pressure.

Switzerland illustrates ambition without allocation. Sixty percent of respondents are exploring budgets, 40% remain cost-driven, and none have budgets in place. This gap may reflect investor-driven priorities: measurement and disclosure precede financial allocation.

Finland and Norway show identical splits: 50% exploring, 50% cost-driven, 0% with dedicated budgets. Both reflect a moral or rhetorical commitment without fiscal resources.

Sweden emerges as the most cost-driven market. Seventy-three percent say cost is the primary factor, 27% are exploring, and none have dedicated budgets. This is consistent with Sweden's limited "very important" responses and top-level but resource-light approach.

Denmark aligns with the global average: Two thirds of companies are exploring a budget, and the rest are cost-focused.

The UK shows a polarized yet decisive picture, with high financial commitment at forty percent and cost as the primary factor at sixty percent.

The gap between recognition and resources is stark. Pharma is the only segment where fiscal commitment begins to match ambition, with no respondent stating that cost is the only deciding factor. Elsewhere, cost remains the decisive barrier.

5. Decision-Making and Mandate

Decision-making authority influences how sustainability is prioritized and resourced.

Switzerland is the clear outlier. Forty-three percent of respondents place responsibility with ESG teams, compared with 17% globally. Procurement (29%) and supply chain (14%) play smaller roles, while senior management (14%) is the lowest of all markets. This institutionalized ESG model explains Switzerland's high reported importance.

Sweden represents the opposite model. Forty-three percent of decisions rest with senior management, the highest of any market. ESG teams hold only 10%. This suggests sustain-

ability is strategically acknowledged but not deeply embedded into operational structures.

Norway and Finland both align with the global average. Decisions are concentrated with supply chain teams (40% in Finland and 50% in Norway) or split across functions, reinforcing the tendency to view sustainability through cost and operational lenses.

Denmark aligns similarly, with slightly more emphasis on procurement than average.

The UK shows a distinctive pattern: no respondents reported ESG teams as decision-makers. Instead, responsibility is shared between senior management (38%), supply chain (37%), and procurement (25%). This integration model embeds sustainability into existing functions rather than creating specialized mandates.

Pharma tilts closer to Switzerland, with 22% citing ESG teams and 23% senior management. This indicates a structured governance approach, though less institutionalized than in Switzerland.

In short, Switzerland exemplifies institutionalized ESG, Sweden a top-down approach, the UK integration without specialization, and Nordic markets operational-cost models.

6. Transport Modes of Interest

Modal interest reflects geographic and economic structures. Globally, road dominates (52%), followed by sea (35%) and air (13%).

Switzerland skews heavily toward road (83%), reflecting its landlocked position and reliance on overland routes. Sea (17%) and air (0%) play minimal roles.

Norway leans the other way: sea dominates at 58%, road follows at 42%, and air registers 0%. This reflects Norway's maritime economy and extensive coastline.

Finland shows a more balanced profile: sea (42%), road (37%), and air (21%). Finland's ports and export profile explain the stronger maritime orientation, while air remains a meaningful share.

Sweden resembles the global pattern but tilts more toward road (61%). Air (11%) reflects Sweden's international reach but remains modest.

The UK is the most balanced market: road (42%), sea (41%), air (17%). This reflects the UK's island geography and role as a global hub.

Pharma diverges, with 29% citing air solutions – the highest across all segments – consistent with the time-critical, condition-sensitive nature of pharmaceuticals.
Modal interest therefore maps closely to geography: Switzerland's land-locked road focus, Norway's maritime dominance, Finland's balanced sea-road-air mix, and the UK's trade-driven balance. Pharma reflects industry-specific reliance on air freight.

7. Preferred Eco Solutions

Preferences for eco solutions are shaped both by modal focus and national context. Globally, EVs lead (38%), followed by alternative fuels (30%), modal shift (26%), and carbon offsets (6%).

Switzerland strongly favors EV freight (50%), consistent with road dominance and supportive infrastructure. Alternative fuels and modal shift split the remainder, while offsets receive no support.

Norway tilts toward modal shift (46%), reflecting its maritime strength and infrastructure for intermodal solutions. EVs remain strong (31%), consistent with Norway's global EV leadership.

Finland emphasizes alternative fuels (40%) and EVs (35%), reflecting its energy expertise and technical focus. Modal shift and offsets are less prominent.

Sweden shows strong EV preference (42%) and no support for offsets. Local presence of Volvo and Scania likely bolsters confidence in electrification.

The UK mirrors Sweden, with 46% EV preference, modest support for fuels and modal shift, and 0% offsets. UK respondents reflect national skepticism toward offsets following high-profile media scrutiny.

Pharma largely mirrors global preferences, underscoring mainstream reliance on EVs and alternative fuels.

Offsets are consistently weak across European markets, while EVs dominate where infrastructure and policy align. Norway and Finland illustrate modal or fuel-specific preferences, while Switzerland and Sweden align strongly with EVs. ■

Correlation of Themes Across Countries

1. Importance of Sustainability + Commitment to Sustainability

High reported importance does not always translate into validated commments.

- Switzerland ranks highest in reported importance but has no SBTi uptake, relying on internal goals.
- Pharma combines both high importance and high validated commitments.
- Sweden scores strongly on internal targets, despite the moderate self-reported importance.
- Norway and Finland show inconsistencies: importance is acknowledged, and engagement with SBTi follows the global average.

This demonstrates that importance is culturally and rhetorically embedded, while commitment depends on regulatory alignment or sectoral pressure.

2. Fiscal Commitment + Importance of Sustainability

The gap between importance and budget allocation is universal.

- Switzerland (high importance, no budgets) epitomizes this contradiction.
- Sweden (no "very important," no budgets, cost-dominant) shows rhetorical limits reflected in fiscal practice.
- Pharma, again, is the exception: higher importance aligns with higher fiscal allocation.

This suggests that industry context (pharma) drives fiscal follow-through more than geography.

3. Fiscal Commitment + Decision-Making

Decision-making structures explain fiscal behavior.

- Switzerland: ESG-led decision-making correlates with high importance, but lack of budgets reflects investor-driven focus on reporting.
- Sweden: Senior management dominance without ESG teams correlates with no fiscal follow-through, suggesting strategic recognition but weak operationalization.
- UK: absence of ESG teams and reliance on operational teams correlates with the highest budget commitment.
- Pharma: ESG involvement correlates with higher budget allocations.

4. Drivers + Fiscal Commitment

Drivers explain where budgets may follow.

- Where customer expectations dominate (Denmark, Norway), fiscal follow-through remains weak, suggesting pressure is external but not yet resourced.
- Where intrinsic carbon reduction dominates (Switzerland, Sweden), budgets are explored but not allocated, suggesting measurement precedes spending.
- Pharma aligns strongest: compliance-driven and ESG-led drivers correlate with higher fiscal allocation.

5. Drivers + Decision-Making

Decision-making alters how drivers play out.

- In ESG-led models (Switzerland, Pharma), intrinsic drivers dominate.
- In senior management-led models (Sweden, UK), measurable drivers like carbon footprint reduction weigh more heavily.
- In logistics-led models (Finland, Norway), cost concerns dampen fiscal follow-through.

6. Transport Mode + Solution Preference

Modal preferences align closely with chosen solutions.

- Switzerland: Road dominance + EV preference.
- Norway: Sea dominance + modal shift preference.
- Finland: Sea prominence + alternative fuel preference, reflecting energy expertise.
- UK: Balanced modes in road and sea + high EV interest.
- Pharma: Air prominence + balanced eco solutions, reflecting sector specificity.

Key findings

The survey reveals a clear baseline: sustainability is universally acknowledged in logistics, but fiscal follow-through is limited. **Pharma** is the only segment consistently aligning importance, validation, and budget. **Switzerland** leads rhetorically but favors internal frameworks over SBTi and has yet to allocate budgets. **Sweden** and the **UK** represent pragmatic models: sustainability is integrated but operationalized differently – senior management-led in Sweden, cross-functional in the UK. **Norway** and **Finland** highlight contradictions between rhetoric and resources, often shaped by geography and trade structures.

Modal and solution preferences mirror geography and sectoral realities: Switzerland road + EV, Norway sea + modal shift, Finland sea + fuels, UK balanced, Pharma air + broad solutions.

Carbon footprint reduction is the universal driver. Yet fiscal resources lag, and governance structures explain much of the gap. ESG-led models correlate with stronger commitments, while operational or senior-management-led models risk rhetoric without budgets.

The insights underline both convergence and divergence: convergence in recognizing sustainability, divergence in how markets translate ambition into action. ■

Section 2

Individual Results & Analysis

02

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Global Results

The survey achieved an overall response rate of **28%**, with the highest participation from customers in the pharmaceutical sector and from Switzerland and Finland.

Many of the findings confirmed expectations. Customers place sustainability as a key factor in logistics decision-making, but typically alongside – not above – cost and efficiency. Reducing carbon footprint emerged as the primary motivation for adopting eco-friendly solutions. Yet in most organizations, no dedicated budget is allocated to sustainable logistics, and responsibility for such initiatives is typically embedded within broader operational or procurement teams rather than assigned to specialized sustainability roles.

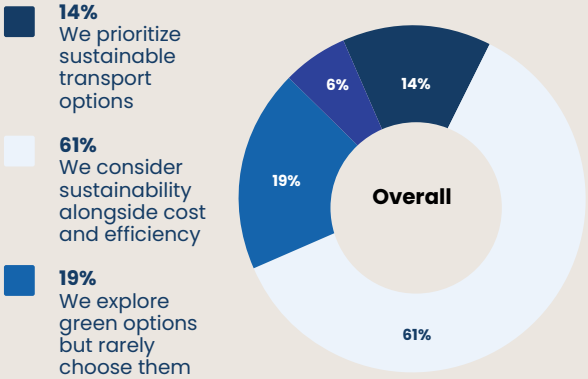
One result stood out as an outlier. In recent years, we have seen a growing interest from customers in LEMAN's own science-based targets. However, only 29% of respondents reported having approved targets or being in the process of setting them. This gap between expressed interest and actual implementation signals an opportunity for deeper engagement and support.

These insights will directly inform our strategic planning. By aligning our eco solutions more precisely with customer priorities, capabilities, and readiness levels, we can ensure that each offering meets specific needs – delivering measurable sustainability benefits without compromising operational performance.

1. Importance of Sustainability

Despite current trade disruptions and wider economic uncertainty, customers continue to place sus-

1. How important is sustainability in your company´s logistics decisions?



tainability high on their list of priorities. The majority – **61%** – consider it equally alongside cost and efficiency, while **14%** say it is a primary factor in their logistics decisions. Only a small minority **(6%)** indicate that cost and speed take precedence over all else.

Given today's relatively high cost of eco transport solutions, this level of commitment is notable. We expect uptake to increase in the coming years, driven by two key trends: first, the anticipated reduction in cost as technological advancements – such as alternative fuel systems, electrification of transport modes, and improved energy efficiency in equipment – move from pilot projects to scalable deployment; second, the broader market adoption of these innovations, which will make sustainable solutions more accessible and commercially competitive.

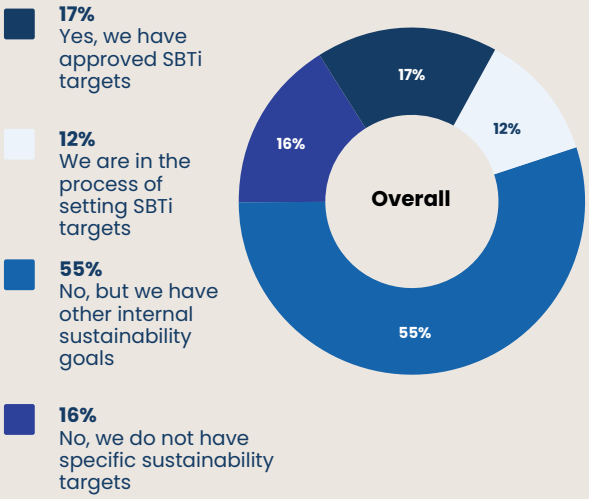
As technology matures and supply chains adapt, barriers to adoption are likely to diminish, enabling more companies to align their cost, efficiency, and environmental goals.

2. Commitment to Sustainability

The Science Based Targets initiative (SBTi) is a globally recognized framework that validates corporate greenhouse gas reduction targets in line with climate science and the goals of the Paris Agreement. Organizations commit to measurable emission reductions across their operations and value chains, following a structured process: setting near-term and/or net-zero targets, submitting them for SBTi validation, implementing reduction measures, and reporting progress annually.

We selected SBTi as a benchmark for external sustainability commitment for two main reasons: first, its rapid uptake among leading companies across industries; and second, our own experience of increasing customer requests for LEMAN to join the initiative.

2. Does your company have SBTi (Science Based Targets initiative) commitments?



Against this backdrop, it was unexpected to find that only **29%** of our surveyed customers are associated with SBTi targets – either having approved targets **(17%)** or being in the process of setting them **(12%)**. The majority have chosen to pursue other sustainability goals or frameworks instead.

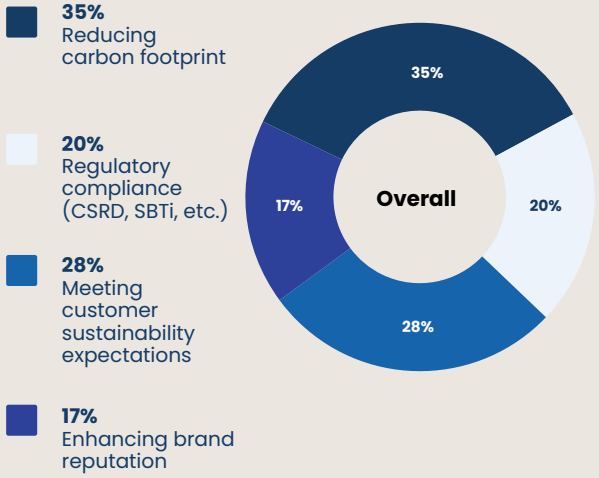
Our experience suggests a clear dynamic: Customers with SBTi targets often begin asking their suppliers to follow suit, creating a ripple effect down the supply chain. However, many logistics providers – often smaller in size – face challenges in navigating the technical and administrative requirements of the process. Here, there is a practical opportunity: Larger customers could accelerate supply chain decarbonization by sharing their expertise, tools, and best practices to support supplier target setting

3. Main drivers for eco transport solutions

When asked about the main drivers for choosing eco transport solutions, **35%** of respondents cited reducing carbon footprint as their top reason. This was expected – whether targets are externally validated or set internally, most corporate sustainability goals are anchored in emissions reduction, making carbon footprint a core metric with well-defined, measurable initiatives attached. Interestingly, meeting customer expectations ranked second at **28%**, ahead of regulatory compliance (**20%**) and enhancing brand reputation (**17%**). This underscores the influence of the downstream value chain: End customers are not only shaping commercial terms but are now actively driving sustainability requirements. Their expectations are cascading down supply chains, making environmental performance a competitive necessity rather than an optional value-add.

These results highlight a dual motivation for adopting eco transport solutions – addressing environmental impact directly while also responding to market signals from custom-

3. What are the main drivers for considering eco transport solutions?



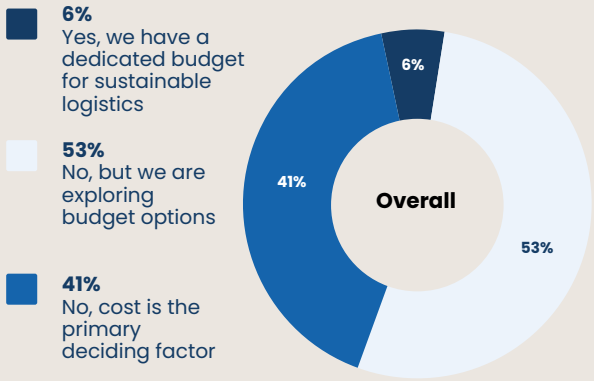
ers who increasingly expect tangible action on sustainability.

4. Fiscal commitment to sustainable logistics

Only **6%** of respondents have a dedicated budget for eco transport solutions. A further **53%** are exploring budget options, while **41%** say cost is the primary factor in decision-making.

This aligns with broader industry trends: Customers expect suppliers to provide sustainable options, but few commit resources to support them. Most companies still treat sustainability impact as the responsibility of individual players, despite the fact that supply chains – and specifically Scope 3 emissions – often account for the largest share of a company's carbon footprint.

4. Does your company have an allocated budget for sustainable transport solutions?



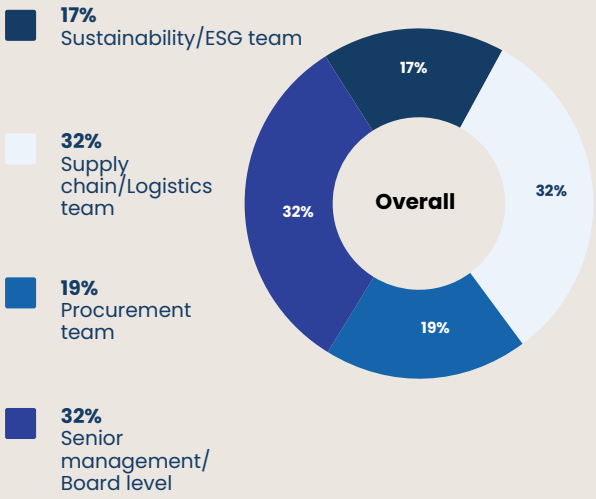
High costs remain a clear barrier. Without cost-sharing from customers, it is difficult for transport providers to absorb the expense of eco solutions, which slows adoption and development. As long as cost remains the decisive factor, embedding the full price of eco solutions into logistics rates will not be a competitive strategy.

5. Decision-making & mandate

Decision-making authority on sustainable logistics is split between operational and strategic functions. **32%** of respondents said decisions are made by supply chain and logistics teams, **19%** by procurement, **17%** by sustainability or ESG teams, and **32%** at senior management or board level.

The results confirm that logistics and procurement teams are the primary drivers. This has clear implications: when responsibility sits with functions focused on cost and operational performance, the uptake of eco transport solutions is likely to remain limited. From our experience, these solutions only move forward consistently when senior management provides a direct mandate or when dedicated

5. Who is responsible for making decisions about sustainable transport solutions in your company?



sustainability teams have a budget to manage.

The relatively low share of decisions driven by dedicated sustainability teams (17%) reinforces this point. Without top-level direction, cost considerations tend to outweigh sustainability ambitions in day-to-day decision-making.

This finding also connects directly to fiscal commitment. As seen in the budget results, only 6% of customers allocate dedicated funds to eco transport, with most citing cost as the decisive factor. When the teams making decisions are the same ones most constrained by budget and cost metrics, sustainability investments are deprioritized unless senior leadership intervenes.

Taken together, these results point to a recurring structural barrier: cost pressures combined with decision ownership by procurement and logistics teams slow down the adoption of eco transport. Unless sustainability is anchored at senior levels and backed with budget authority, progress will remain incremental.

6. Transport mode focus

Interest in eco transport modes aligns with cost levels. **Road** was the most selected option (**52%**), followed by **sea** (**35%**), with **air** last at **13%**. Air is the most expensive mode, and therefore drew the least attention, while road – currently the cheapest eco alternative – was the clear preference.

This shows that interest is not correlated with environmental impact, but with feasibility and cost accessibility. It reinforces the conclusion that cost is the decisive factor in sustainability decisions.

Eco road solutions also stand out because they provide visible proof of action – electric and HVO100 trucks can be seen at customer premises. By contrast, air and sea eco solutions are delivered through book-and-claim mechanisms, offering less literal visibility to customers.

7. Eco solution preference

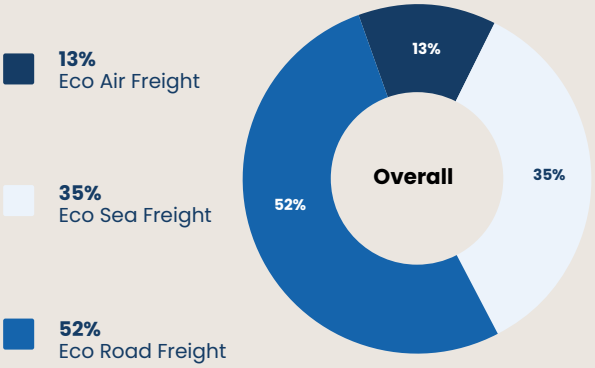
When asked which type of eco solution they prefer, customers selected EV freight solutions most often (**38%**), followed by alternative fuels such as HV0100, sustainable marine fuels, and sustainable aviation fuels (**30%**). Modal shift was chosen by **26%**, while only **6%** preferred carbon offset programs.

The prominence of EV freight reflects two factors. First, electric mobility is widely recognized and relatable, given its visibility in passenger transport and everyday life. Second, EV trucks are slowly but steadily following the curve to price parity with diesel as vehicle prices fall and charging infrastructure develops, including upcoming mega chargers. These dynamics make EVs a more tangible and accessible option for customers.

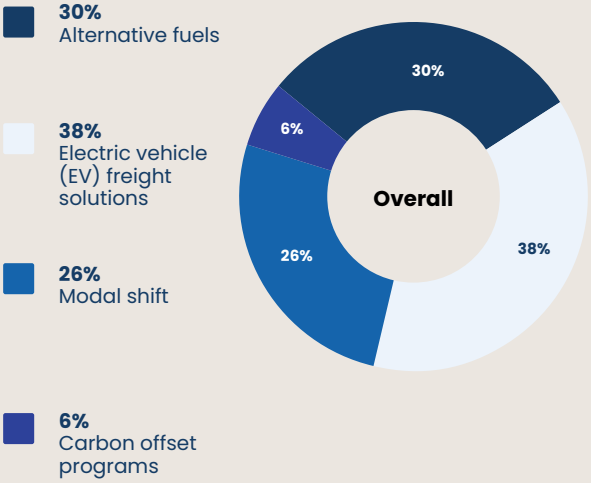
An important nuance is that EV freight is not currently the most affordable eco road solution – yet it is still the most preferred. This serves as evidence that visibility and narrative also play a role in shaping preferences. Customers gravitate toward solutions they can see on the road and connect to broader societal shifts, even if these options are not yet the cheapest.

Alternative fuels remain a strong second preference, but their higher cost and limited prospects for near-term price reductions dampen broad-

6. For which transport mode(s) are you most interested in eco solutions?



7. Which eco transport solutions would you be most interested in?



er appeal. Modal shift ranks slightly lower, and carbon offsets remain the least preferred option, consistent with their declining credibility in sustainability strategies. ■

Key takeaways from the global results

The global results point to a clear pattern. **Sustainability is important to customers, but almost always weighed against cost and efficiency.** Reducing carbon footprint is the strongest driver for eco solutions, yet actual fiscal commitment remains limited, with only 6% of respondents allocating a dedicated budget. Most decisions are still made by logistics and procurement teams, where cost considerations dominate, and senior management or sustainability teams play a smaller role unless a direct mandate is given.

The Science Based Targets initiative are an example of the gap between ambition and action. Although SBTi is widely recognized and customers increasingly request their suppliers to align with it, only 29% of respondents are directly engaged with the initiative. **Without stronger top-level guidance and budget allocation, adoption across the supply chain will remain slow.**

Preferences for modes and solutions reinforce these dynamics. Road transport leads as the cheapest and most visible option, secondary to climate impact. EV freight is the top preferred eco solution despite not being the most affordable – showing that visibility and narrative can influence choices alongside cost. In contrast, alternative fuels and modal shift, while critical for long-term decarbonization, face slower uptake due to higher costs and less tangible customer connection.

Taken together, these findings reveal a recurring structural barrier: Cost pressures combined with decision ownership by procurement and logistics functions slow down the adoption of eco solutions. At the same time, visibility and relatability can accelerate interest, even when economics are not yet favorable. For real progress, sustainability needs to be anchored in sustainability teams, supported with dedicated budgets, and paired with collaboration across the supply chain. Without this shift, eco transport will remain secondary to cost, and the pace of decarbonization will lag behind stated ambitions. ■

Pharmaceutical & Healthcare Industry Results

The global pharmaceutical industry stands at a pivotal crossroads in its journey toward sustainability. As expectations evolve, the sector, which has traditionally prioritized safety, speed, and compliance, must now integrate climate accountability into its logistics and distribution models. Logistics emissions, primarily categorized under Scope 3, are central to a pharmaceutical company's climate commitments and increasingly influence supplier selection.

The sustainability imperative is particularly pronounced in the sector's freight transport strategy. Pharmaceutical companies are actively rethinking their modal mix, shifting away from the past reliance on air freight, and towards more carbon-efficient combinations that include pharma-ready road and sea transport. Each mode is undergoing a rapid transformation:

Road freight is seeing increased adoption of low-emission fuels such as HVO100, biogas, and compressed natural gas, especially in Europe and North America.

Sea freight is gaining share in pharma transport as the cold-chain infrastructure becomes more reliable. Sea freight is emerging as the default green choice for scheduled bulk shipments.

Air freight, while still critical for urgent or highly controlled shipments, is evolving to offer sustainable alternatives – especially as SAF availability increases and air cargo transparency demands rise.

There is a noticeable push toward intermodal solutions that blend speed, reliability, and sustainability. These hybrid models account more for carbon intensity across the different legs of a shipment, while ensuring the integrity of the cold chain. Real-time data visibility, driven by IoT sensors and blockchain platforms, is becoming standard. These developments not only support compliance with Good Distribution Practices (GDP) but also help calculate accurate carbon footprints across multimodal journeys.

Equally important is the transformation occurring in packaging, inventory management, and reverse logistics. From reusable thermal containers and biodegradable insulation to AI-powered demand planning that minimizes overproduction and spoilage, sustainability is being embedded

into every link of the logistics chain. In conclusion, the pharmaceutical industry's logistics transformation is shifting from a reactive to a strategic mode. Sustainability is becoming the foundation of how pharmaceutical products move across the globe. With cleaner transport modes, digital innovation, and smarter packaging systems, pharma leaders can ensure their supply chains are not only efficient and compliant but climate-resilient, future-proof, and aligned with the health and well-being goals they ultimately serve.

Response rate

The pharma industry had the highest response rate compared to any national segmentation, at **88%.** Together with the responses, this solidifies the engagement of the industry with sustainability. ■

1. Importance of Sustainability

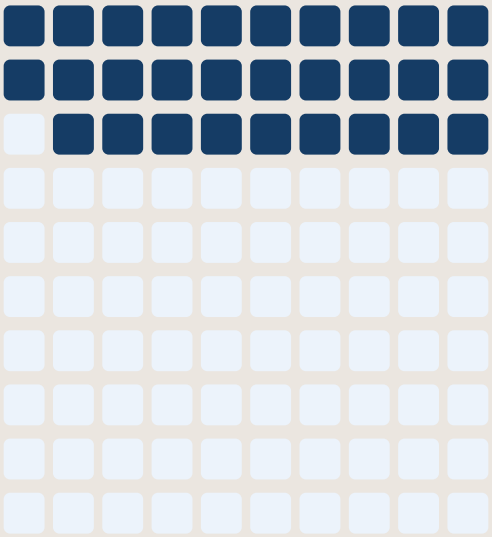
Pharma respondents stand out for the weight they place on sustainability in logistics decisions. **29%** rated it as very important – double the global average of 14% – and the remaining **71%** considered it important. Not a single respondent dismissed sustainability as secondary to cost or efficiency.

This shows that, within pharma, sustainability is consistently integrated into logistics decision-making, with a higher proportion elevating it to a top priority compared with the global customer base.

1. How important is sustainability in your company´s logistics decisions?

- We prioritize sustainable transport options
- We consider sustainability alongside cost and efficiency
- We explore green options but rarely choose them
- Cost and speed are our main priorities

Pharma



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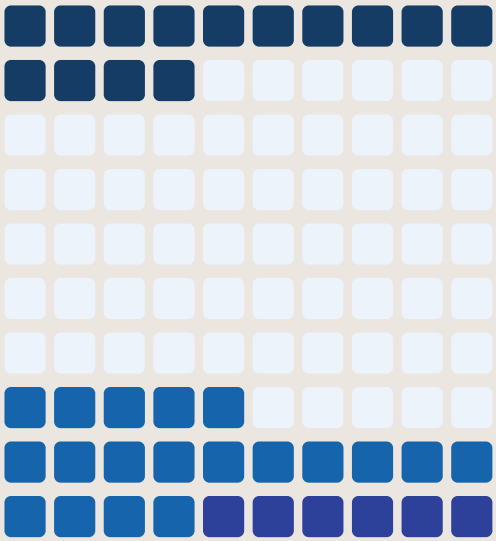


2. Commitment to Sustainability

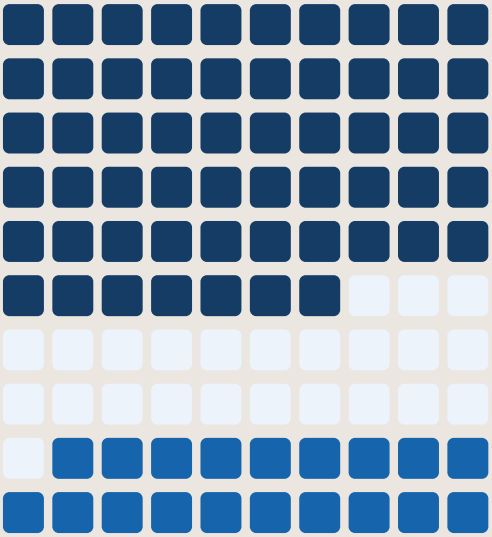
Pharma customers show a much stronger external commitment than the global average. **71%** are engaged with the SBTi process – **57%** with approved targets and **14%** in the process of setting them – compared with just 29% across all industries. The remaining **29%** report other internal sustainability goals.

Notably, no pharma respondent reported operating without sustainability targets of some kind, highlighting a level of accountability well above the cross-industry baseline.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

Pharma



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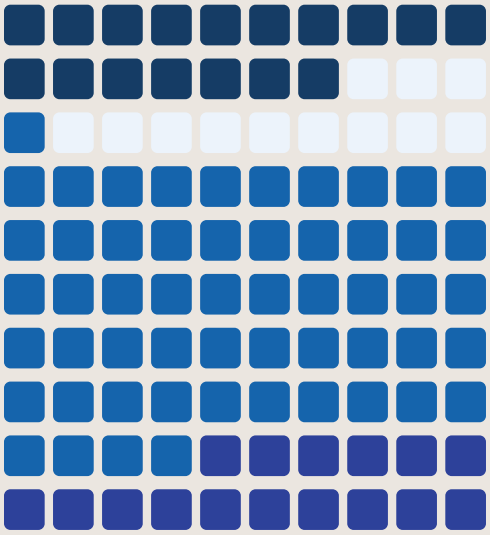


3. Main drivers for eco transport solutions

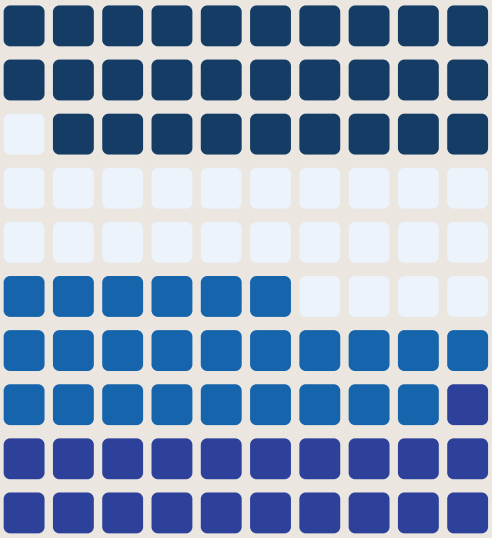
Pharma responses closely mirror the global picture: **29%** cited reducing carbon footprint, **25%** regulatory compliance, **25%** meeting customer expectations, and **21%** brand reputation. The differences are minor, suggesting consistent motivations across industries and potential for cross-sector synergies.

One interesting detail is the relative weight of regulatory compliance. Given pharma's high regulatory exposure, a stronger skew might have been expected. Instead, results suggest that sustainability regulations have not been disruptive for pharma, likely because the industry was already well-prepared to incorporate compliance into its operations.

3. What are the main drivers for considering eco transport solutions?

- Reducing carbon footprint
- Regulatory compliance (CSRD, SBTi, etc.)
- Meeting customer expectations
- Enhancing brand reputation

Pharma



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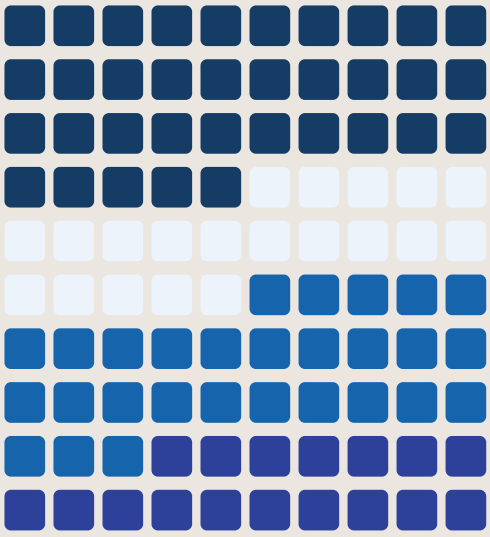


4. Fiscal commitment to sustainable logistics

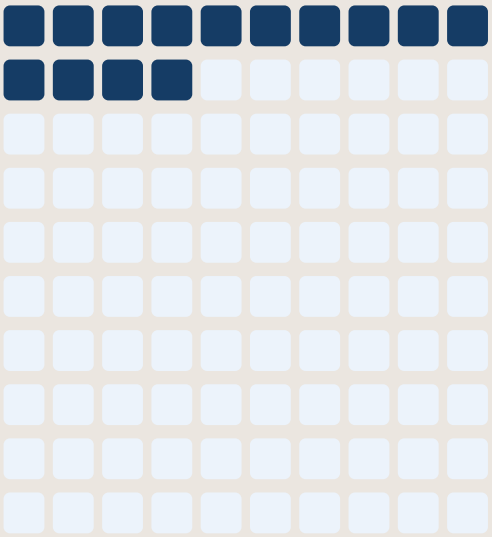
Pharma customers report stronger fiscal commitment than the global average. **14%** already have a dedicated budget for sustainable transport – double the cross-industry level of 6%. The remaining **86%** are exploring budget options, and none reported having no budget affiliation at all.

This aligns with earlier results: higher importance placed on sustainability and stronger external commitments are reflected in greater financial readiness to support eco logistics.

4. Does your company have an allocated budget for sustainable transport solutions?

- Yes, we have a dedicated budget for sustainable logistics
- No, but we are exploring budget options
- No, the cost is the primary deciding factor

Pharma



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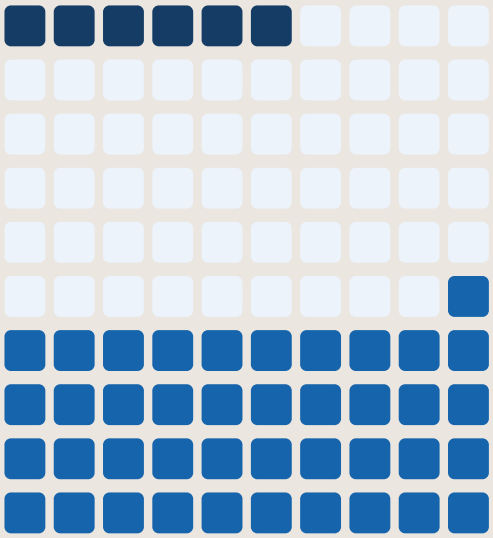
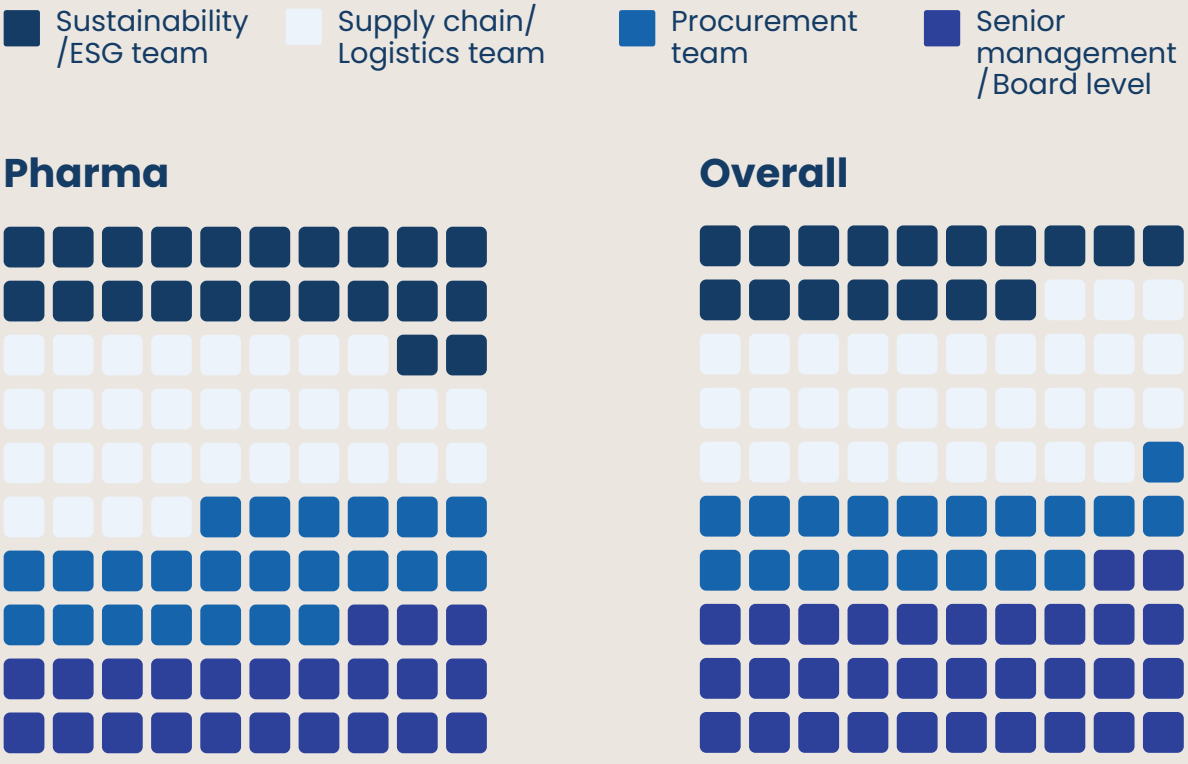


5. Decision-making & mandate

Pharma responses differ only slightly from the global pattern but show a clear shift in emphasis. **22%** of decisions are driven by sustainability teams, compared with 17% globally, while senior management accounts for **23%,** versus 32% overall. Supply chain **(32%)** and procurement **(23%)** remain in line with the broader results.

The takeaway is that pharma delegates responsibility more often to dedicated sustainability functions, with less concentration at the senior management level. This suggests that sustainability in pharma is integrated into organizational structures rather than held primarily at the top.

5. Who is responsible for making decisions about sustainable transport solutions in your company?



6. Transport mode focus

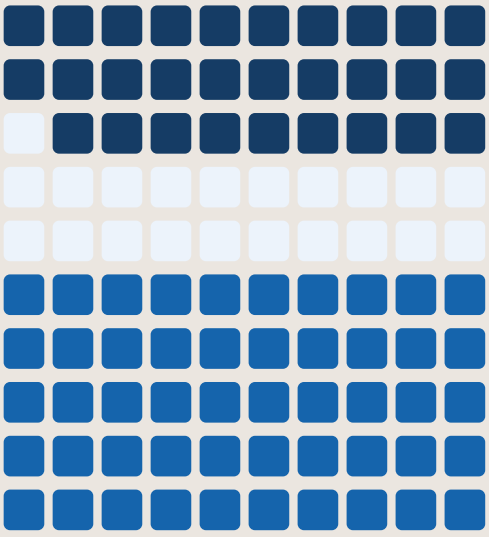
Pharma customers show a distinct split in modal interest compared with the global results. Road remains similar (**50%** vs. 52% globally), but the balance between air and sea shifts significantly: **29%** of pharma respondents are most interested in eco air solutions – **more than double the global share** – while only **21%** selected sea, compared with 35% overall.

This reflects the nature of pharmaceutical logistics, where time- and condition-critical shipments rely heavily on air freight. Interest in mitigating the climate impact of this mode is therefore much higher, and justifiable given its operational importance in the sector.

6. For which transport mode(s) are you most interested in eco solutions?

Eco Air Freight Eco Sea Freight Eco Road Freight

Pharma



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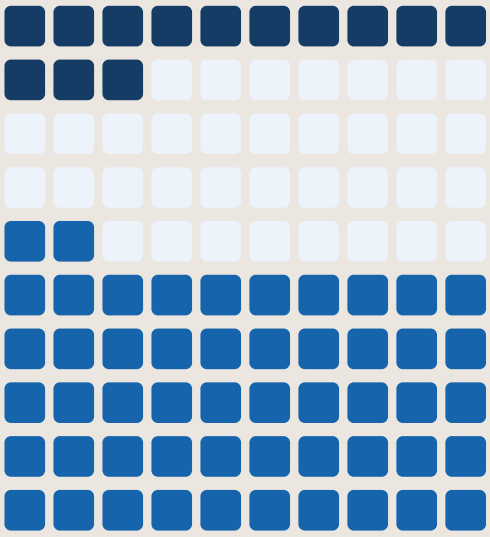


7. Eco solution preference

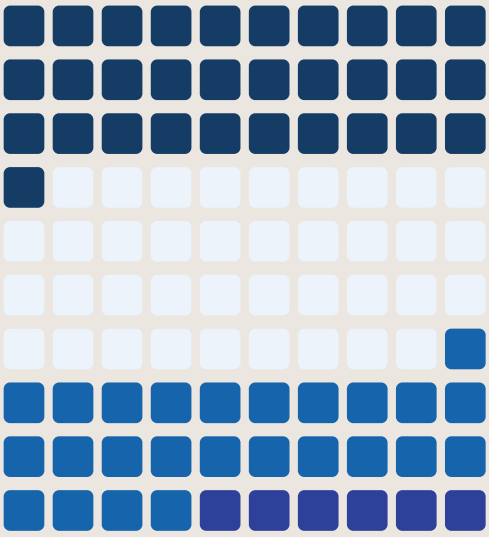
Pharma customers mirror the global results almost exactly: **38%** favor EV freight, **31%** alternative fuels, **25%** modal shift, and only **6%** carbon offsets.

The absence of notable deviations suggests that preferences are shaped less by sector-specific factors and more by the broader sustainability discourse influencing all industries.

7. Which eco transport solutions would you be most interested in?

- Alternative fuels
- Electric vehicle (EV) freight solutions
- Modal shift
- Carbon offset programs

Pharma



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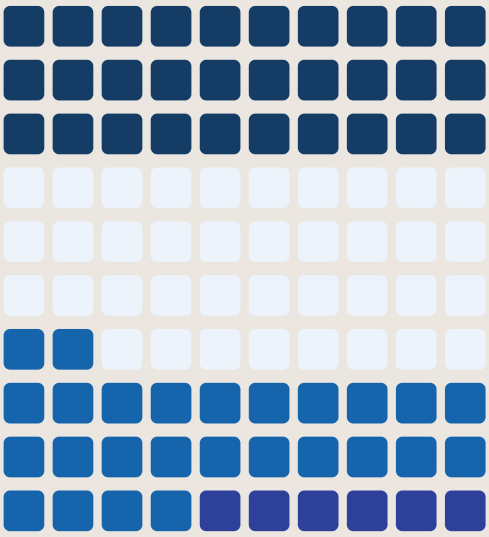


Denmark

Denmark is positioning itself as a regional sustainability front-runner in freight logistics, leveraging a strong policy framework, world-class green energy infrastructure, and a deeply collaborative public-private sector dynamic. As part of its commitment to reach climate neutrality by 2045 and reduce transport emissions by 70% by 2030 (compared to 1990 levels), the country is rapidly transforming its freight and logistics ecosystem across road, sea, and air.

The Danish government is actively using regulation, fiscal incentives, and public procurement to decarbonize the logistics value chain. Carbon pricing plays a growing role, with Denmark implementing a national carbon tax in parallel with its inclusion in the EU Emissions Trading System (ETS). From 2025 onward, an increasing number of transport segments – including road freight – will face more direct emissions costs under EU ETS2, which will further encourage low- and zero-emission transport solutions.

Denmark's road freight sector, while traditionally reliant on diesel, is undergoing structural change. Electric trucks are gaining traction thanks to the country's commitment to expanding charging infrastructure and zero-emission zones in urban centers. The Danish Road Directorate and key fleet operators are jointly piloting e-truck corridors, and subsidies for heavy-duty electric trucks and biogas vehicles are accelerating uptake. Denmark also promotes green last-mile logistics.

Denmark's leadership in green maritime logistics is among the most globally recognized. Maersk and other Danish operators are investing in methanol- and ammonia-fueled vessels, shore power solutions, and zero-emission port infrastructure.

In air freight, sustainability progress is more nascent but steadily advancing. Denmark aligns with EU mandates under ReFuelEU Aviation, requiring the gradual blending of Sustainable Aviation Fuels (SAF).

Technology adoption is another core pillar. Denmark has a high digital maturity in the logistics sector, with companies deploying AI-powered route optimization, dynamic fleet management systems, and blockchain for emissions tracking. The widespread availability of renewable energy (especially wind power) enables true low-carbon electrification of freight systems, from warehouses to EV fleets and port infrastructure.

Looking ahead, Denmark's freight sector will increasingly be shaped by the interplay of EU regulatory pressure, national carbon pricing, and customer demand for cleaner supply chains.

While challenges remain – especially in scaling EV trucks for long-haul, standardizing SAF supplies, and improving cross-border freight harmonization – Denmark's integrated approach offers a strong foundation for further progress. The country is not only reducing emissions at home but also acting as a testbed and model for sustainable freight practices across Europe

Response rate

The response rate from Denmark was on the lowest scale, at **12%.** Nonetheless, in absolute numbers, the results are comparable to other countries. ■

1. Importance of Sustainability

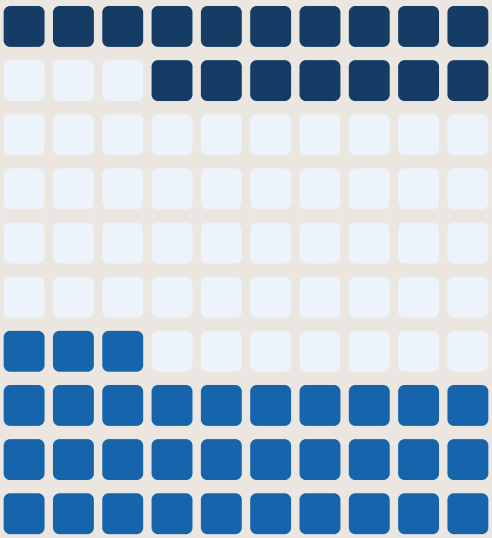
In Denmark, **17%** of respondents rated sustainability as very important, **50%** as important, and **33%** as somewhat important. No respondents said sustainability was not important.

Compared with the global results, Denmark shows a higher overall penetration of sustainability in logistics decisions, though fewer respondents rated it as a top priority. The absence of "not important" answers underlines that sustainability is consistently on the agenda for Danish companies, even if not always placed above cost and efficiency.

1. How important is sustainability in your company´s logistics decisions?

- We prioritize sustainable transport options
- We consider sustainability alongside cost and efficiency
- We explore green options but rarely choose them
- Cost and speed are our main priorities

Denmark



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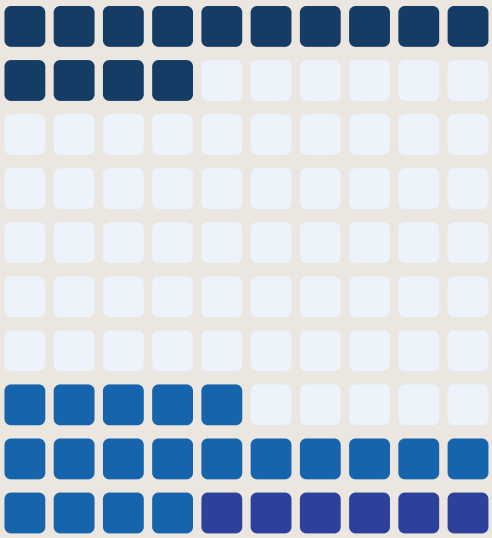


2. Commitment to Sustainability

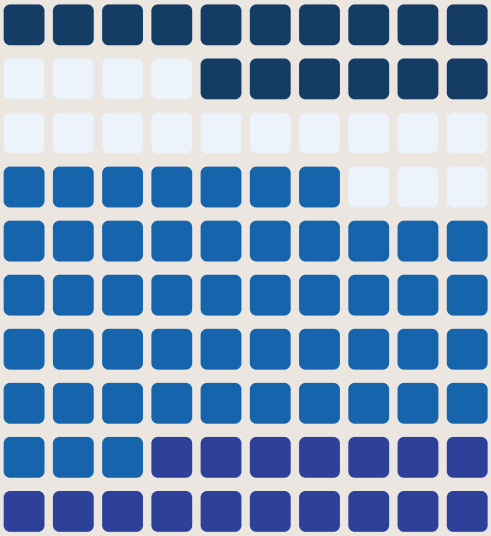
Danish responses closely track the global pattern: **16%** have approved SBTi targets, **17%** are in the process of setting them, **50%** report other internal goals, and **17%** have no specific targets.

No significant deviations appear, indicating that Danish companies are aligned with global trends in how they approach external versus internal sustainability commitments.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

Denmark



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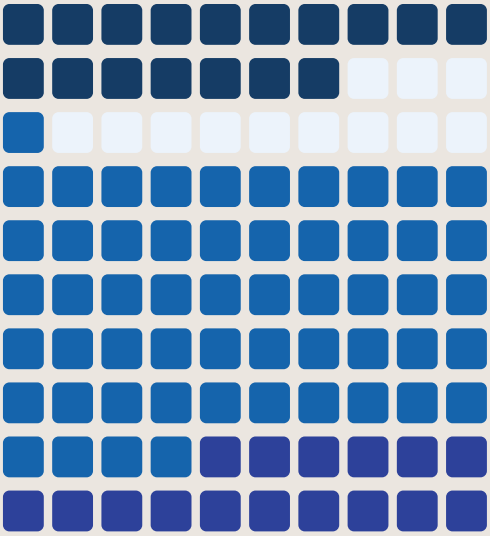
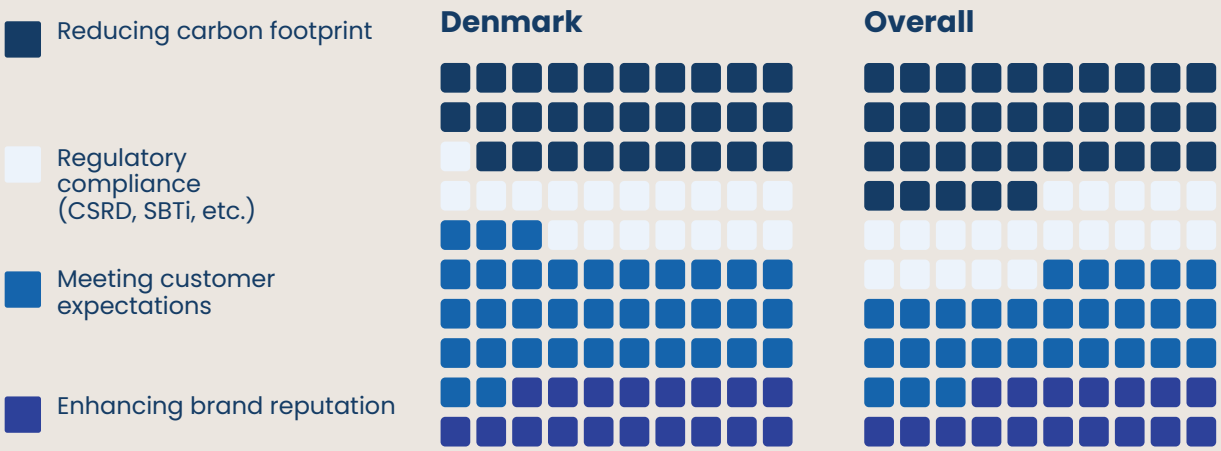


3. Main drivers for eco transport solutions

The responses from Danish customers regarding their main motivations are more or less following the global pattern. The percentages in every motivation are smaller compared to the global average and it appears that the difference concentrates on one driver that is dominant in Denmark: Meeting the sustainability expectations of end-customers.

With **35%** of the respondents in Denmark driven by meeting the expectations of end-customers, compared to the global responses at 28%, reveals that sustainability is a mainstream narrative in Denmark – one that gathers interest from not only corporations but primarily from citizens. Denmark has a singular approach to road mobility, with high fees and transportation costs even for private vehicles, mostly driven by sustainability savings. This mainstream status of sustainability is pulling corporations into paying extra attention to sustainable logistics.

3. What are the main drivers for considering eco transport solutions?



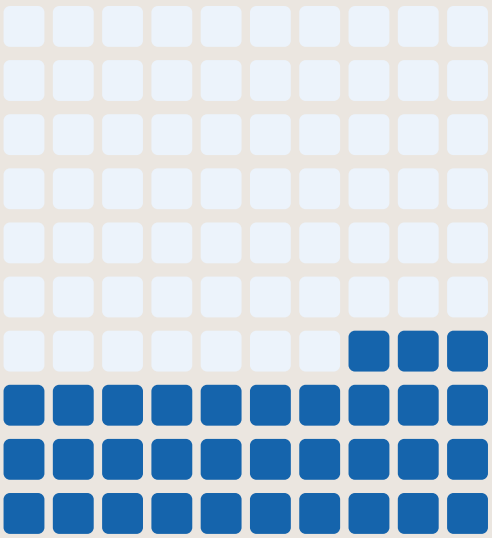
4. Fiscal commitment to sustainable logistics

The majority of Danish respondents **(67%)** are exploring budget options for sustainable logistics. This is a higher share from the global responses. Conversely, **one in 3** Danish respondents is completely detached from a sustainable logistics budget, compared to 41% in global responses. However, no Danish respondent stated that they already have a dedicated budget. This picture reinforces the trend noticed in Denmark: Sustainability is a dominant narrative that has permeated corporate strategies more than the global benchmark, but Denmark in its majority is in a solution-exploration phase rather than a solution-execution phase.

4. Does your company have an allocated budget for sustainable transport solutions?

- Yes, we have a dedicated budget for sustainable logistics
- No, but we are exploring budget options
- No, the cost is the primary deciding factor

Denmark



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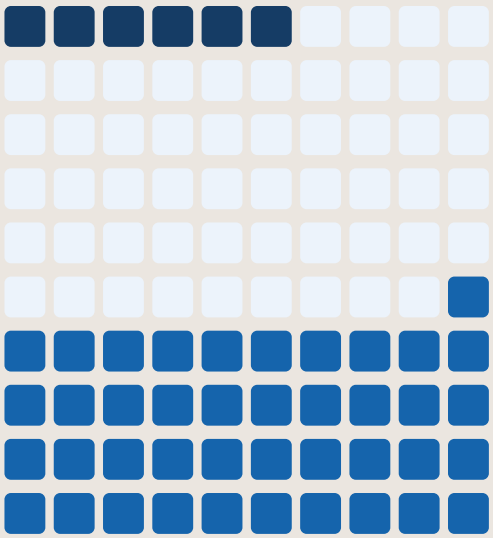
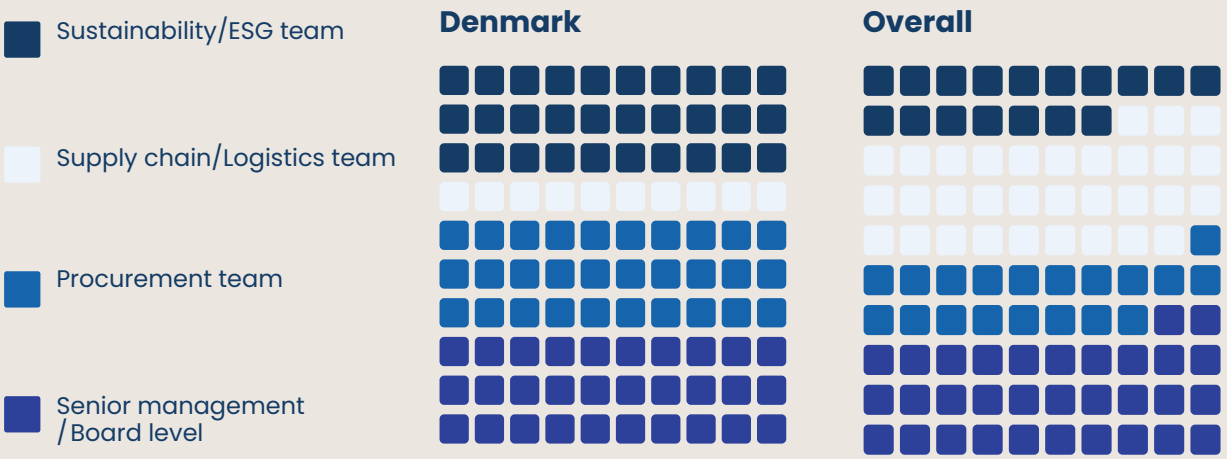


5. Decision-making & mandate

The responsibility and mandate of sustainable logistics lies with dedicated Sustainability/ESG teams in almost **1/3** Danish respondents – almost double the percentage from the global benchmark. **10%** responded that the responsibility of sustainable logistics is with supply chain/logistics teams – 1/3 of the global benchmark. Almost **1/3** Danish respondents stated that the mandate lies with the procurement team – significantly more than the global response.

This picture is revealing. While a dedicated sustainability team shows that companies are investing in ESG-focused resources, the smaller percentage in supply chain and logistics teams may mean that the dedication does not manifest into the actual purchasing of eco solutions when coordinating with a logistics service. In addition, the large percentage of supply chain teams with the mandate for sustainable logistics reveals that these companies are positioned well to facilitate the collaboration with the supply chain – a crucial aspect for sustainability overall.

5. Who is responsible for making decisions about sustainable transport solutions in your company?



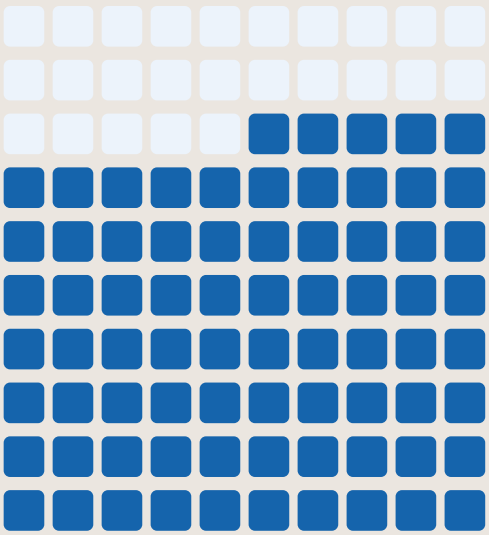
6. Transport mode focus

3/4 respondents are interested in Road eco solutions and the remaining **1/4** in Sea eco solutions. Denmark reports zero interest in Air eco solutions. The results follow the picture of the preferred modes of Danish logistics: Denmark is a major hub for European and Scandinavian road transportation. In addition, Denmark is also a shipping giant, with some of the largest maritime logistics companies pushing the envelope globally. However, this maritime leadership is not reflected in our results – our interpretation is that the knowledge that sea freight is the most sustainable mode of transport is widespread in Denmark and customers believe that choosing this as a mode is a "sustainable-enough" action with room for little environmental savings.

6. For which transport mode(s) are you most interested in eco solutions?

Eco Air Freight Eco Sea Freight Eco Road Freight

Denmark



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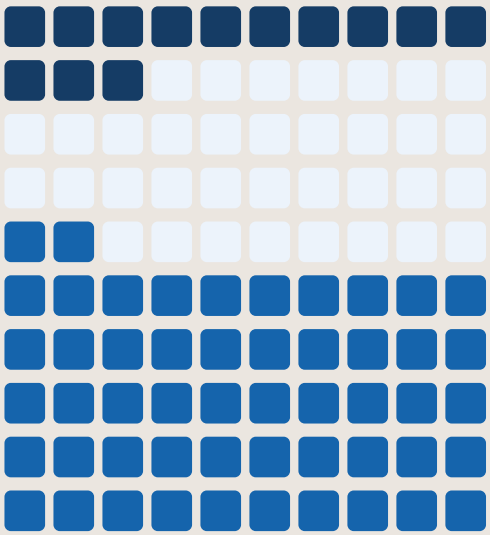


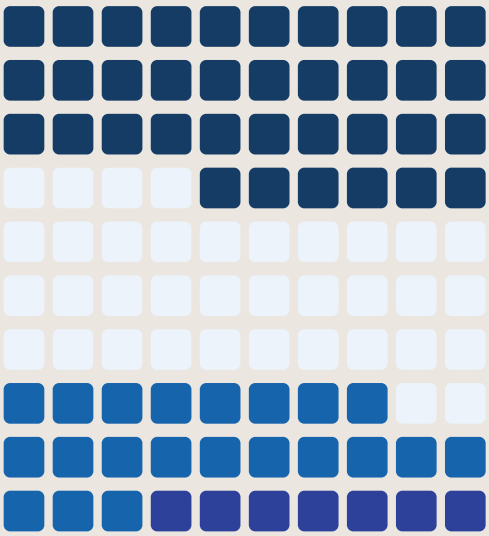
7. Eco solution preference

Regarding the specifics of eco solutions for transport, the Danish respondents are interested in: Alternative fuels and EV solutions at **36%** respectively, Modal shift at **21%**, and carbon offsets at **7%**. Denmark falls well in line with the global responses, without any significant deviations.

7. Which eco transport solutions would you be most interested in?

- Alternative fuels
- Electric vehicle (EV) freight solutions
- Modal shift
- Carbon offset programs

Denmark



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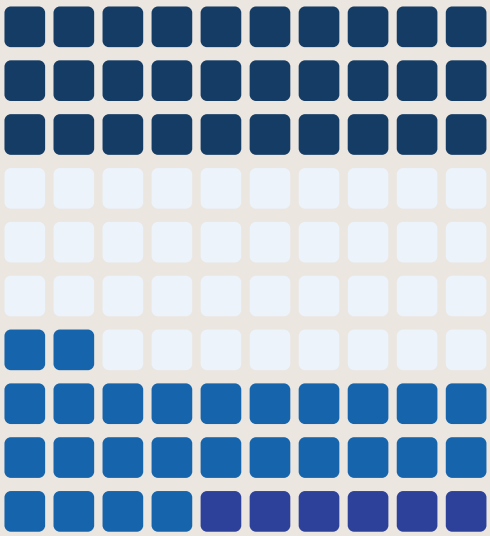


Finland

Finland is steadily emerging as a Nordic leader in sustainable freight logistics, combining ambitious climate policies with a pragmatic, technology-forward approach to decarbonization. With a national goal of achieving carbon neutrality by 2035 – one of the most aggressive timelines in Europe – Finland is strategically aligning its logistics sector with both EU-level regulatory frameworks and domestic policy drivers. This includes implementation of carbon pricing, infrastructure investments, and incentives that promote the use of cleaner transport modes and technologies. The country's logistics ecosystem benefits from a relatively high level of digital maturity and strong collaboration between public authorities, private operators, and research institutions.

Road freight remains the dominant mode in Finland, but it is undergoing rapid transformation. With a well-established charging network and an energy grid powered largely by renewable sources, Finland is well-positioned to scale up the use of electric trucks and other zero-emission vehicles. The government has set clear targets for electrifying one-third of heavy-duty kilometers by 2030, backed by funding mechanisms, infrastructure deployment, and procurement incentives.

In maritime logistics, Finland is complying with the increasingly strict EU and IMO regulations, including low-sulphur fuel mandates and a 2025 national ban on open-loop scrubber discharges. This regulatory push is driving the adoption of LNG-powered ships, battery-hybrid vessels, and eco-efficient port solutions across major terminals like Hamina Kotka and Helsinki.

Air freight, while a smaller segment, is progressing toward sustainability through initiatives focused on SAF (Sustainable Aviation Fuel) adoption, carbon accounting, and airport decarbonization.

Looking ahead, Finland's logistics market is poised for continued evolution as carbon taxes, EU ETS reforms (including ETS2), and green financing mechanisms reshape the competitive landscape. Finland is developing a logistics system that is both environmentally responsible and economically resilient. While there are still structural and technological barriers to overcome – especially in rural areas and long-haul segments – the momentum is strong, and the foundations are solid. Finland's logistics sector is not just reacting to climate policy but helping shape the future of sustainable freight in the Nordic region and the EU.

Response rate

The response rate from Finland was one of the highest, at **53%**, showing the national engagement in sustainability. ■

1. Importance of Sustainability

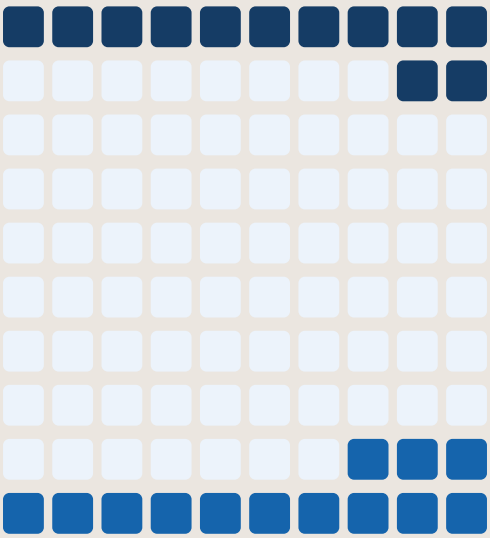
In Finland, **12%** of respondents rated sustainability as very important, **75%** as important, and **13%** as somewhat important. None considered it not important.

This mirrors Denmark in showing full penetration of sustainability in logistics decision-making, but with an even stronger tilt toward parity: three-quarters of Finnish respondents place sustainability on equal footing with cost and efficiency. While fewer rank it above cost, the absence of any "not important" responses confirms that sustainability is consistently integrated into procurement and logistics decisions in Finland.

1. How important is sustainability in your company´s logistics decisions?

- We prioritize sustainable transport options
- We consider sustainability alongside cost and efficiency
- We explore green options but rarely choose them
- Cost and speed are our main priorities

Finland



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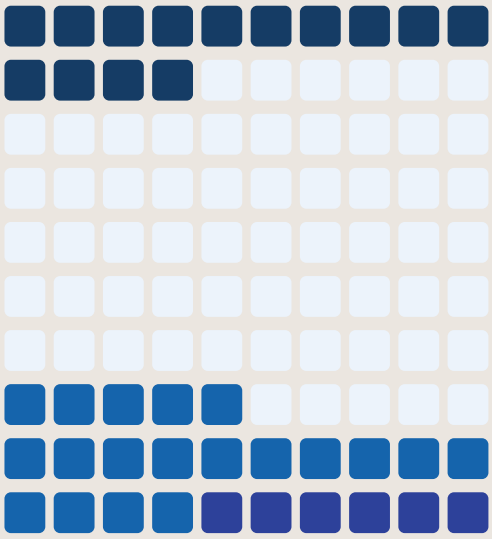


2.Commitment to Sustainability

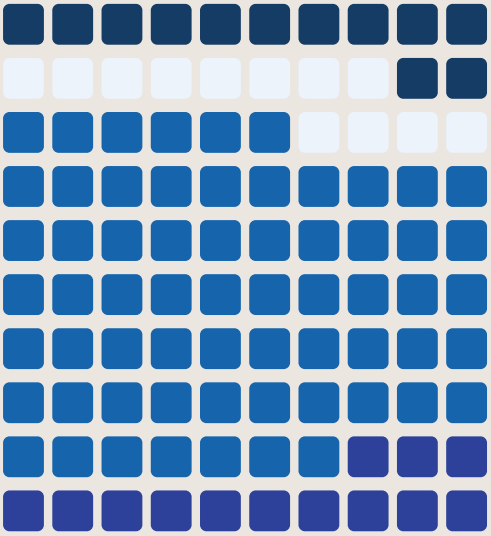
Finnish responses track the global pattern with non-significant variations: **12%** have approved SBTi targets, **12%** are in the process of setting them, **63%** report other internal goals, and **13%** have no specific targets.

One deviation is notable: More Finnish companiers report internal sustainability goals indicating that they place a slightly higher significance on their own corporate goals.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

Finland



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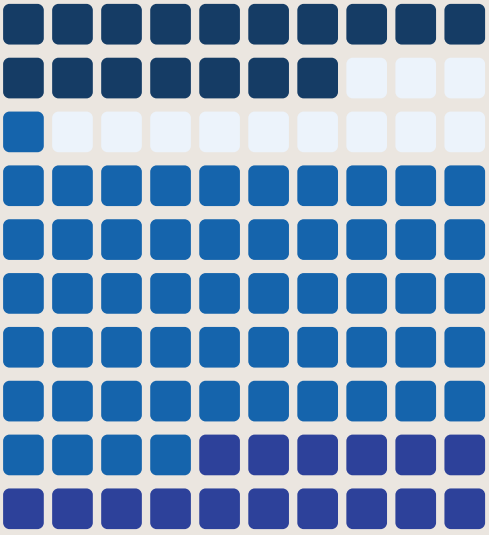


3. Main drivers for eco transport solutions

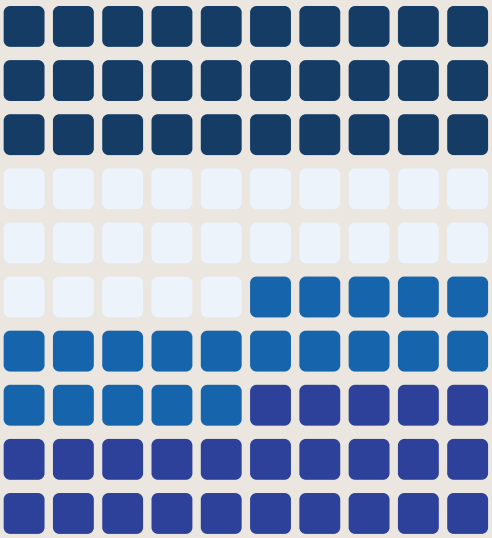
Finnish results are broadly aligned with the global pattern but show two notable shifts. Brand reputation is cited by **25%** of respondents, well above the global average of 17%. Meeting customer expectations, by contrast, is lower at **20%** compared with 28% globally. Reducing carbon footprint **(30%)** and regulatory compliance **(25%)** are in line with international results.

The stronger emphasis on brand reputation likely reflects Finland's consumer landscape, where sustainability is highly visible and reputational impact carries significant weight. Rather than external pressure from customers in the supply chain, Finnish companies may be more attentive to public perception and stakeholder expectations in their home market.

3. What are the main drivers for considering eco transport solutions?

- Reducing carbon footprint
- Regulatory compliance (CSRD, SBTi, etc.)
- Meeting customer expectations
- Enhancing brand reputation

Finland



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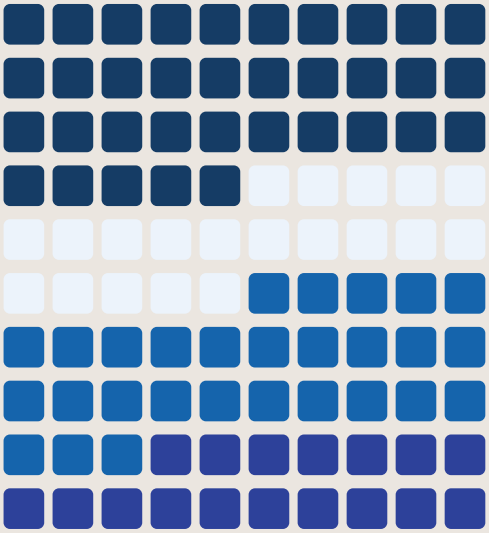


4. Fiscal commitment to sustainable logistics

In Finland, no respondents reported having a dedicated budget for sustainable transport. Half **(50%)** said they are exploring budget options, while the other half **(50%)** indicated cost is the primary factor and have no plans to allocate funds.

This stands in contrast to the earlier finding from the responses in Question 1, where three-quarters rated sustainability on par with cost and efficiency. The results suggest that for many Finnish companies, sustainability remains more of a moral or reputational commitment than a financial one. While it is recognized as important, concrete budget allocation lags behind, reflecting cost sensitivity in a competitive market.

An additional nuance is that Finnish companies may rely on broader corporate sustainability programs and internal goals, as responses in question 2 suggested, rather than setting specific budgets within logistics. This could explain the absence of "yes" responses despite high stated importance.

4. Does your company have an allocated budget for sustainable transport solutions?

5. Decision-making & mandate

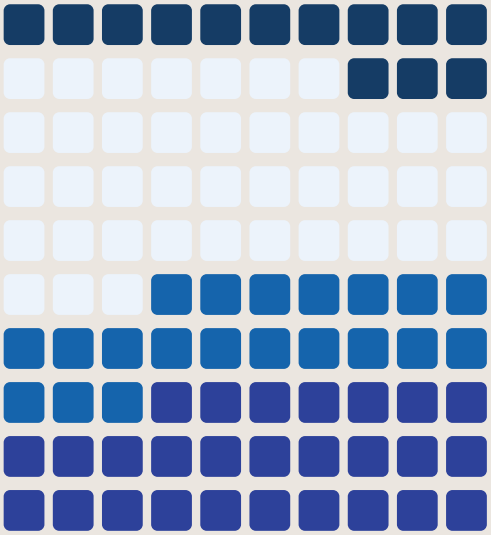
Finnish results are broadly in line with global trends but show a stronger role for logistics teams. **40%** of decisions are made by supply chain and logistics functions, compared with 32% globally. Procurement **(20%)** and senior management **(27%)** are close to the global average, while sustainability teams are slightly lower at **13%** versus 17% globally.

This indicates that in Finland, sustainable logistics decisions are more operationally anchored. The prominence of logistics teams reinforces the cost-driven outlook seen in the previous question, where few are prepared to dedicate funds. Without stronger involvement from senior management or sustainability teams, operational cost considerations are likely to outweigh long-term strategic ambitions.

5. Who is responsible for making decisions about sustainable transport solutions in your company?

Sustainability /ESG team
Supply chain/ Logistics team
Procurement team
Senior management / Board level

Finland



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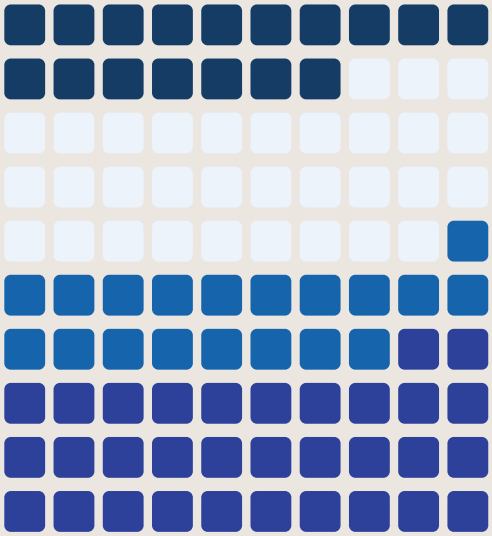


6. Transport mode focus

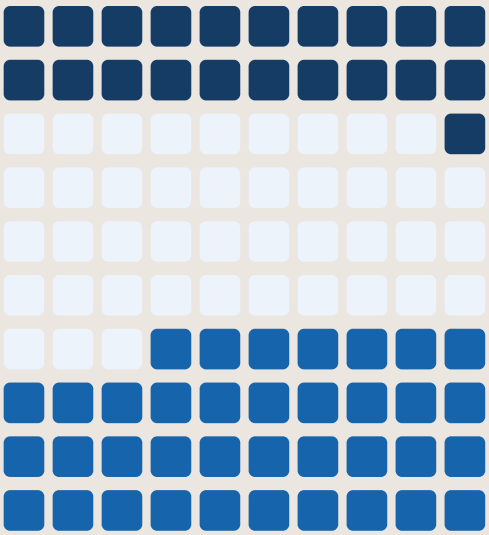
Finnish respondents show a different modal profile compared with the global average. **42%** expressed most interest in sea solutions, ahead of road **(37%)** and air **(21%)**.

The strong focus on sea is expected given Finland's reliance on maritime trade, the prominence of its ports, and the regulatory commitments already shaping this sector. What stands out is the lower relative interest in road, despite road transport's domestic dominance in Finland. This suggests that when it comes to eco investments, companies may prioritize areas where sector-wide frameworks and infrastructure already exist, such as ports and shipping. The higher-than-average interest in air (21% vs. 13% globally) also signals that companies are mindful of air freight's carbon intensity, even if it plays a smaller role than sea or road in the Finnish context.

6. For which transport mode(s) are you most interested in eco solutions?

Eco Air Freight Eco Sea Freight Eco Road Freight

Finland



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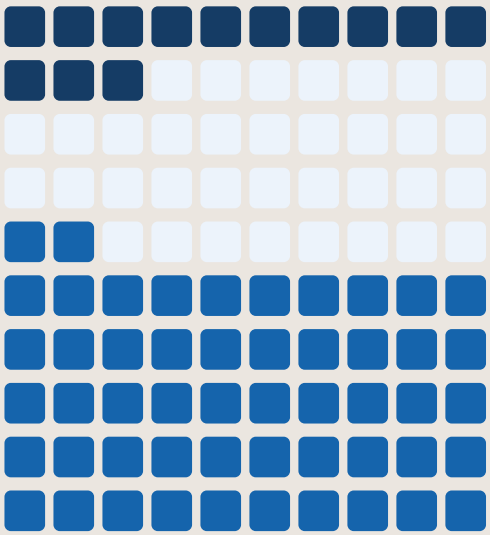


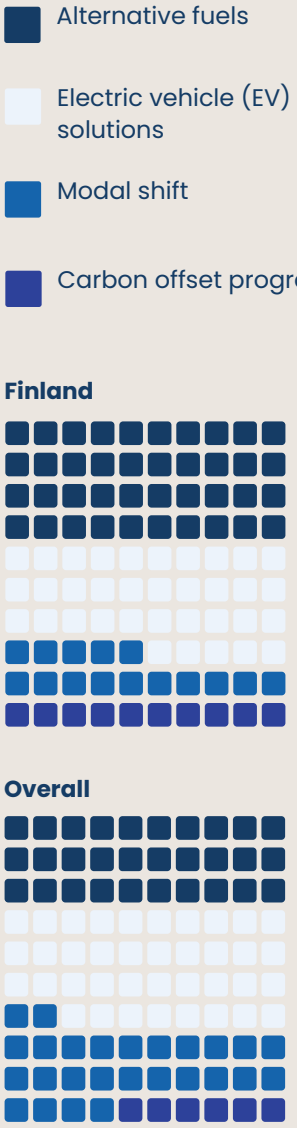
7. Eco solution preference

Finnish respondents show a distinct tilt toward alternative fuels **(40%)**, well above the global average of 30%. EV freight follows at **35%**, while modal shift **(15%)** and carbon offsets **(10%)** are lower than the global levels.

The stronger preference for alternative fuels points to a more mature understanding of practical abatement options. Given Finland's reliance on sea transport, sustainable marine fuels are likely a key factor behind this result. The relatively lower but still visible interest in modal shift may also reflect decision-making by logistics teams, who bring operational expertise and are more aware of the levers available to reduce emissions in practice.

The limited interest in offsets confirms a broader trend: Finnish companies, like many peers globally, prioritize direct abatement measures over indirect compensation.

7. Which eco transport solutions would you be most interested in?



Norway

Norway stands at the forefront of sustainable freight logistics in Europe and globally, driven by a unique combination of progressive climate policy, abundant clean energy, and high societal alignment around decarbonization goals. The country's freight transport system is undergoing a profound transformation, grounded in stringent regulatory targets, carbon pricing, and state-backed incentives designed to eliminate fossil fuel dependence across all transport modes.

The road freight sector is especially advanced, with Norway's strong EV ecosystem now extending into heavy-duty trucking. Generous fiscal policies, expanding charging infrastructure, and zero-emission procurement mandates are catalyzing the shift toward electric and biogas-powered freight fleets.

In maritime logistics, Norway is leading globally with its transition toward hybrid-electric and battery-powered vessels, particularly in fjord and coastal zones. Government regulations mandating zero-emission operations in UNESCO-protected areas have triggered substantial investments in cleaner vessels, including cargo ships, ferries, and support boats.

In air freight, the sector is relatively small but still subject to EU-aligned policies such as SAF blending mandates, airport decarbonization requirements, and carbon reporting obligations.

Overall, Norway's freight logistics system is among the most mature and sustainability-oriented in the world. With bold national targets, strong public-private alignment, and an energy mix that enables truly low-carbon electrification, the country is not only decarbonizing domestic logistics but also setting a model for other nations. While challenges remain – such as scaling up zero-emission solutions for long-haul and heavy cargo – Norway's roadmap is clear, ambitious, and well-supported by both policy and technology.

Nonetheless, in an apparent contradiction to the general perception of Norwegian companies as front runners in sustainability (based on divestments of Norway's Sovereign Wealth Fund, the Government Pension Fund Global from coal and fossil fuels companies and companies with sustainability concerns), our survey results have indicated that 25% Norwegian customers consider cost and speed to be deciding factors in their logistics decision and 50% of Norway customers do not have allocat-

ed budget for sustainable transport solutions as they consider cost to be the primary deciding factor.

Response rate

The response rate from Norway was relatively high, at **38%**, reinforcing the interest of Nordic countries in sustainability. ■

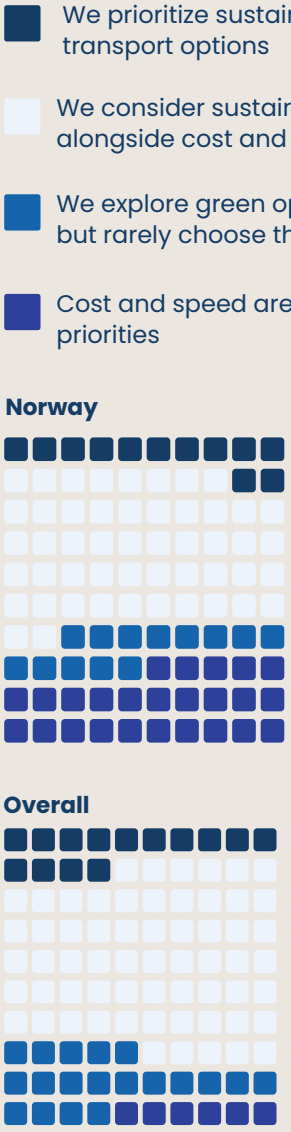
1. Importance of Sustainability

Norwegian results deviate from the global average and towards more disinterest in sustainability: **12%** rate sustainability as very important, **50%** as important, **13%** as somewhat important, and **25%** as not important.

This is a surprising outcome given Norway's strong regulatory framework, public incentives, and overall favorable conditions for sustainability. More than one in three respondents still view sustainability as secondary (somewhat important or not important), showing that supportive national policies have not yet fully translated into consistent corporate priorities in logistics.

The results suggest that while the framework exists, adoption depends on company-level cost and operational considerations, echoing patterns seen elsewhere rather than reflecting Norway's advanced policy environment.

1. How important is sustainability in your company´s logistics decisions?



2. Commitment to Sustainability

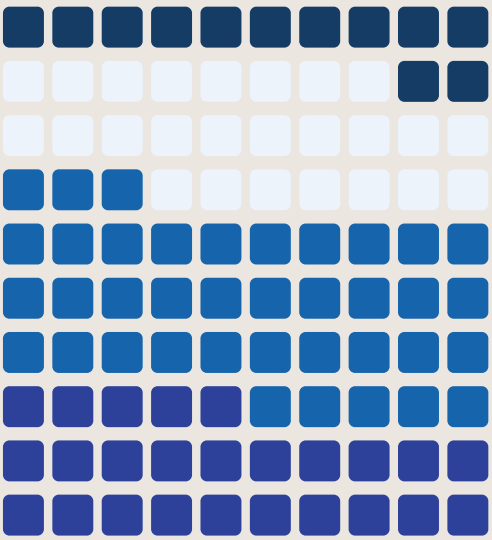
Norway shows greater polarization compared with the global average. **12%** of respondents report approved SBTi targets and **25%** are in the process of setting them – together above the global 29% benchmark. At the same time, **25%** say they have no sustainability targets at all, versus 16% globally. The remaining **38%** report other internal goals.

This split suggests a two-track pattern in Norway: some companies are moving ahead with externally validated targets, while a significant share remain disengaged. Despite the national context of ambitious climate policy, many firms have yet to translate that into concrete commitments.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

Norway



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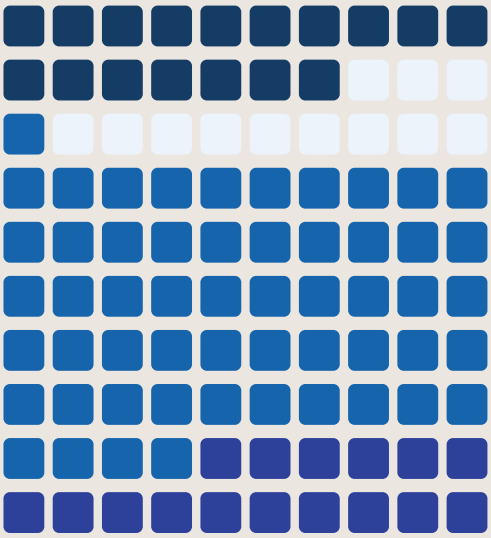


3. Main drivers for eco transport solutions

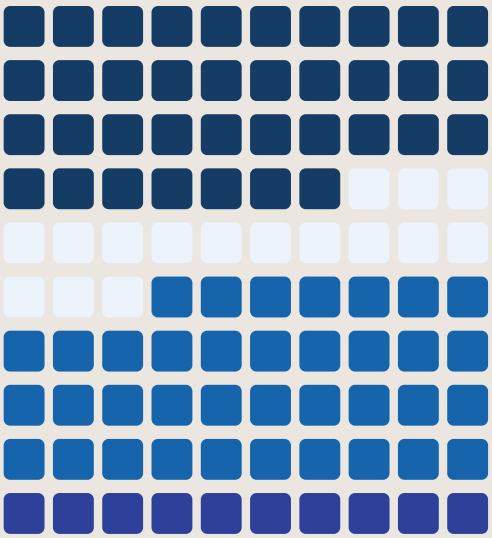
Norwegian results are broadly aligned with the global benchmark, with **37%** citing reducing carbon footprint and **37%** meeting customer expectations as the top drivers. Regulatory compliance **(16%)** and brand reputation **(10%)** rank lower than the global averages.

The higher weight on customer expectations reflects the strong role of downstream value chains in Norway's export-oriented economy. Many Norwegian companies serve international customers who apply strict sustainability requirements, making responsiveness to client expectations a stronger motivator than domestic regulation or brand considerations.

3. What are the main drivers for considering eco transport solutions?

- Reducing carbon footprint
- Regulatory compliance (CSRD, SBTi, etc.)
- Meeting customer expectations
- Enhancing brand reputation

Norway



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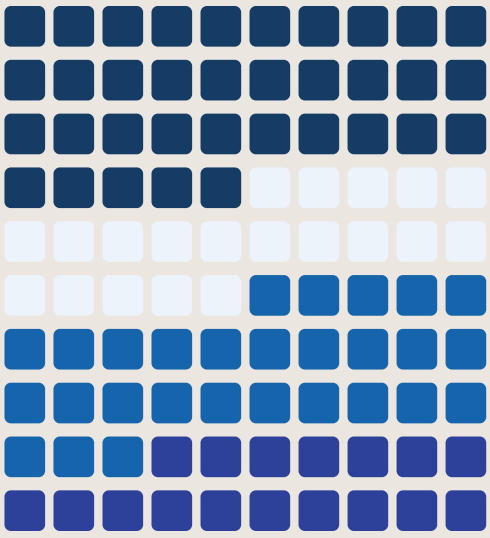


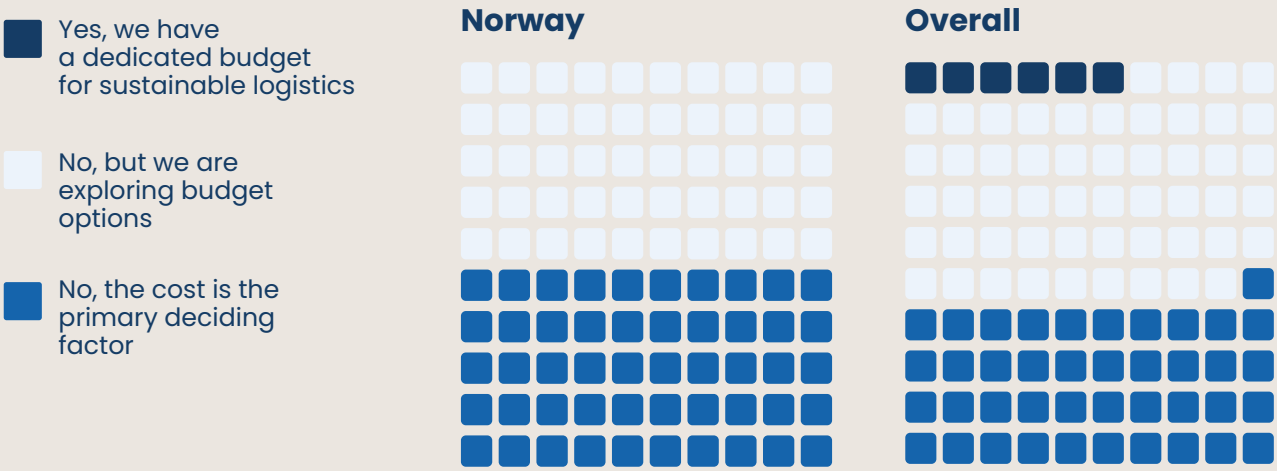
4. Fiscal commitment to sustainable logistics

In Norway, no respondents report having a dedicated budget for sustainable transport. Results are evenly split: **50%** are exploring options, while **50%** state cost is the primary deciding factor.

Unlike Finland, where this split contrasted with strong self-reported importance of sustainability, the Norwegian result is more consistent with earlier findings. One in three respondents placed sustainability as only "somewhat important" or "not important" in their logistics decisions, and 25% reported having no sustainability targets at all. The absence of dedicated budgets aligns with these patterns: sustainability is acknowledged, but financial commitment remains limited.

The results also underline the polarization noted earlier. Some companies are advancing with SBTi commitments, but many remain hesitant to allocate resources. For the latter, cost remains a decisive barrier, and without senior management mandates or external pressure from customers, dedicated budgets for eco transport are unlikely to materialize.

4. Does your company have an allocated budget for sustainable transport solutions?



5. Decision-making & mandate

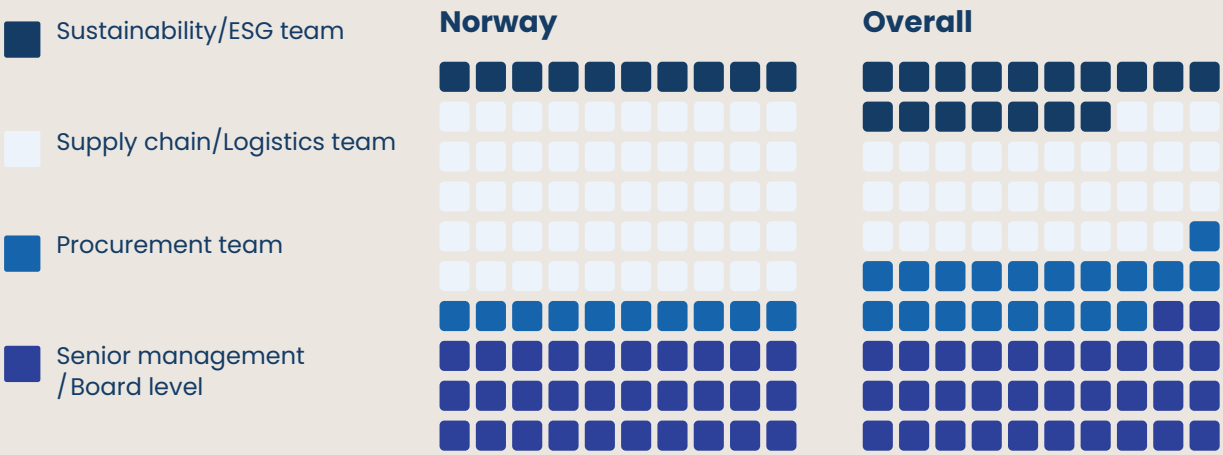
In Norway, responsibility for sustainable logistics decisions rests primarily with supply chain and logistics teams, at **50%** – the highest share across all surveyed countries. Senior management accounts for **30%**, while ESG teams and procurement each represent just **10%.**

This profile largely mirrors the global average for senior management, but redistributes the roles of ESG and procurement toward logistics functions. It suggests that in Norway, decisions are more operationally anchored, sitting with the teams directly responsible for freight execution.

Such proximity to daily operations can ensure practical alignment between sustainability ambitions and logistical realities. However, it also carries the risk of sustainability being filtered through cost and efficiency lenses, potentially slowing adoption of higher-cost eco solutions unless reinforced by top-level mandates.

The dominance of logistics teams may also reflect Norway's sectoral profile, where many companies operate in shipping, fisheries, and energy-intensive industries with complex supply chains. In these contexts, sustainability is less of a boardroom narrative and more of an operational consideration managed by practitioners.

5. Who is responsible for making decisions about sustainable transport solutions in your company?



6. Transport mode focus

Norwegian respondents show a clear modal focus: **58%** expressed most interest in sea solutions and **42%** in road, with **0%** selecting air.

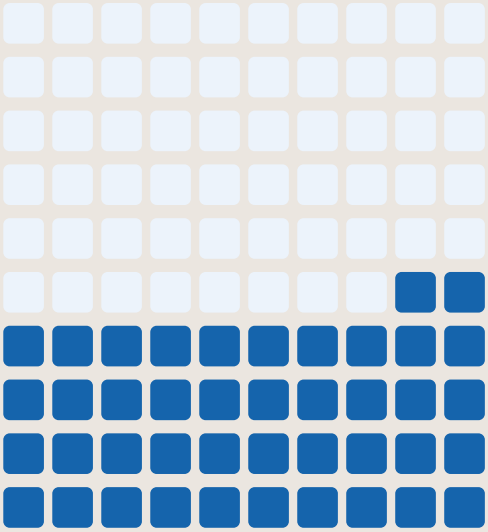
This distribution aligns closely with Norway's freight profile. Air plays a limited role in the country's logistics, so the lack of interest is expected. By contrast, sea dominates import and export flows, and regulatory requirements for vessels in Norwegian waters have already pushed the sector toward decarbonization. The strong focus on eco sea solutions reflects both operational reality and regulatory momentum.

The relatively high share for road also fits Norway's geography, where road is essential to connect ports with inland destinations. Taken together, the results indicate that Norwegian companies prioritize eco investments in the modes most central to their operations, with sea standing out as the main lever for emissions reduction.

6. For which transport mode(s) are you most interested in eco solutions?

Eco Air Freight Eco Sea Freight Eco Road Freight

Norway



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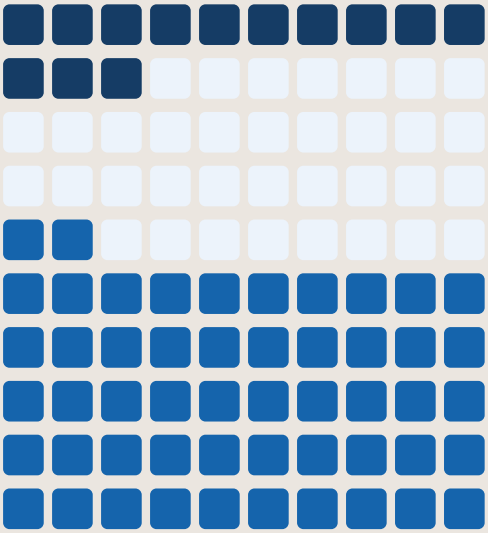


7. Eco solution preference

Norwegian respondents show the strongest preference for modal shift **(46%)**, followed by EV freight **(31%)**, alternative fuels **(15%)**, and carbon offsets **(8%)**.

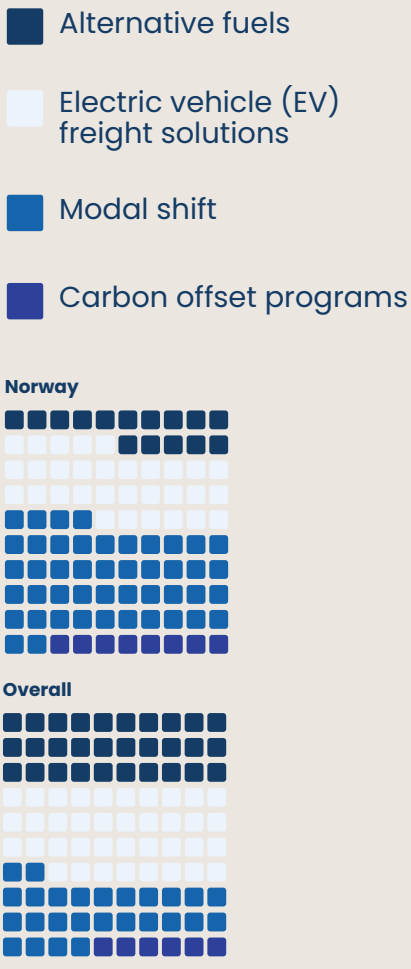
The interest in EV freight is expected. Norway leads the world in EV penetration, with both public incentives and infrastructure already in place. This familiarity extends into logistics, where customers are comfortable seeing EV as a credible decarbonization path.

The more notable result is the strong preference for modal shift. This reflects Norway's geography and freight profile, where sea and rail alternatives are already part of transport planning and regulatory attention. Moving cargo away from road is seen as both feasible and impactful, particularly given the country's well-developed port infrastructure and commitments to greener shipping.

By contrast, alternative fuels draw less attention, likely because their availability and price remain uncertain in the Norwegian market. Carbon offsets, consistent with global trends, attract little interest as customers increasingly look for direct emission reductions.

Overall, the Norwegian profile highlights practicality: Customers favor solutions that align with infrastructure already in place – EV supported by widespread charging networks, and modal shift supported by ports and regulation.

7. Which eco transport solutions would you be most interested in?



Sweden

Sweden stands out as one of Europe's most progressive and structured freight logistics markets when it comes to sustainability. Its national framework is characterized by strong regulatory ambition, cross-sector collaboration, and a long-standing societal commitment to environmental stewardship. This makes Sweden not only a leader in climate policy but also a pioneer in green logistics transformation across road, maritime, and air freight.

The freight sector – particularly road transport – has historically been a major contributor to transport emissions. However, Sweden is rapidly transitioning toward a cleaner freight future through a combination of carbon pricing, targeted subsidies, and innovation support. High carbon taxes and fuel levies serve as powerful economic signals that encourage logistics operators to electrify fleets, invest in route optimization, and adopt alternative fuels like HVO100 and biogas. Sweden's early adoption of electric trucks and mature charging infrastructure place it ahead of many EU counterparts in enabling regional zero-emission road freight.

In maritime freight, Swedish ports are transforming into green logistics hubs. Infrastructure upgrades such as onshore power supply, electrified handling equipment, and low-emission vessel support (e.g., LNG and methanol bunkering) are becoming standard. Gothenburg, the largest port in the Nordics, is actively involved in developing green corridors and is a model for port-led decarbonization in Europe.

The air freight segment, though a smaller slice of total volume, is steadily aligning with EU-wide mandates like ReFuelEU Aviation. As sustainable aviation fuel (SAF) production scales and airports continue investing in fossil-free operations, air cargo operators in Sweden will be well-positioned to offer climate-conscious services – especially critical for high-value exports like electronics, pharmaceuticals, and precision instruments.

Looking ahead, Sweden's freight logistics market is set to become increasingly **demand-driven in terms of sustainability**. Shippers and end-customers – particularly in sectors like retail, manufacturing, and e-commerce – are applying greater pressure on freight forwarders and carriers to offer transparent, low-emission logistics options. This growing market expectation, combined with regulatory tightening under the EU Green Deal, will push laggards to modernize or risk losing competitiveness.

In sum, Sweden is not just following global green logistics trends – it is actively shaping them. As the country deepens its investments in electric freight, port decarbonization, and climate-aligned aviation, the Swedish freight logistics ecosystem is becoming a blueprint for what a climate-resilient, efficient, and future-ready logistics market looks like.

Response rate

The response rate from Sweden at **24%** tracks the global response rate of 28%. ■

1. Importance of Sustainability

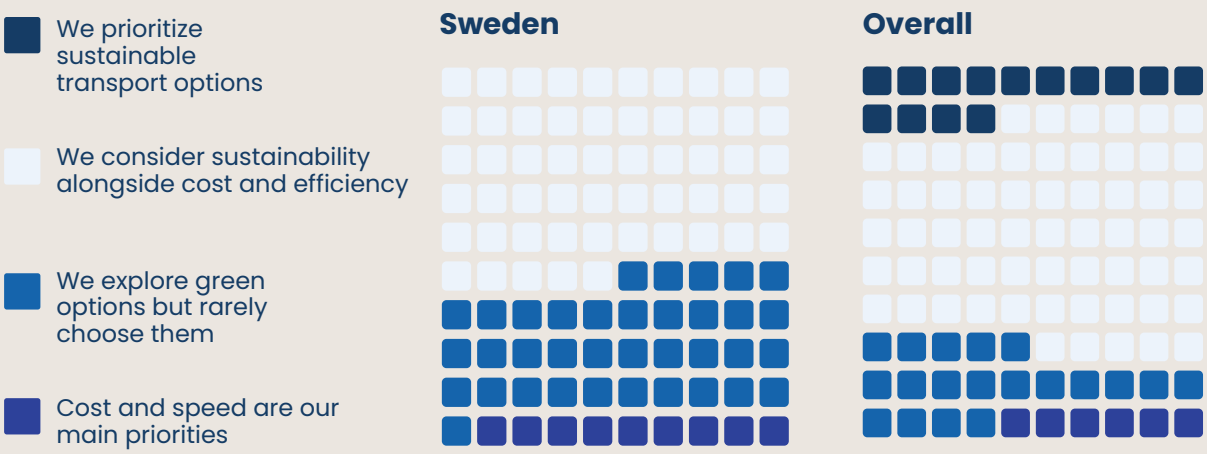
In Sweden, **55%** of respondents rated sustainability as important, **36%** as somewhat important, **9%** as not important, and none rated it very important.

While the majority still integrate sustainability into logistics decisions, the absence of "very important" responses contrasts with Sweden's reputation as a sustainability frontrunner. This may reflect the maturity of the sustainability narrative in Sweden: Expectations for responsible practices are already mainstream, making companies less likely to single out sustainability as a stand-alone top priority. Instead, it is treated as a given – one element among many factors, including cost and efficiency.

The share of "not important" answers (9%) also signals a degree of divergence. Some companies remain focused on immediate operational priorities, even within a market known for strong environmental policy and consumer awareness.

Overall, the Swedish profile suggests that sustainability is embedded in decision-making, but often framed as part of a balanced approach rather than as a driver that overrides other concerns.

1. How important is sustainability in your company´s logistics decisions?

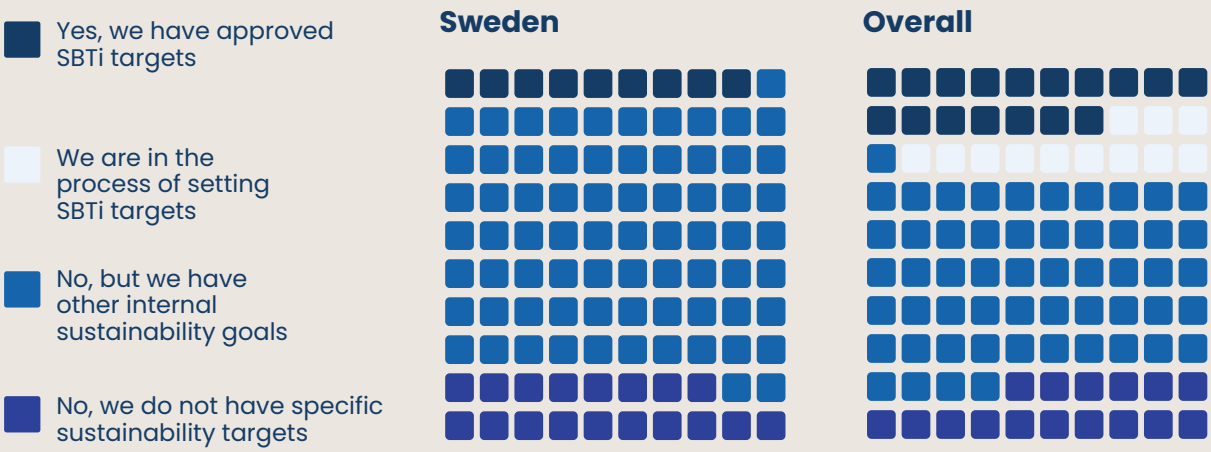


2. Commitment to Sustainability

Swedish respondents demonstrate a singular alignment with sustainability targets. While the SBTi engagement is low, with **9%** of the respondents reporting approved targets and no respondents in the process of setting SBTi targets, internal sustainability targets at **73%** are way above the global average and the second highest across countries.

This result reinforces the intrinsic and pragmatic sustainability profile of Sweden. With sustainability being a mainstream topic in Swedish companies and carbon measurements a common corporate practice, internal sustainability goals that are closely aligned with each company's operations fit with the rest of the responses and the country's history with sustainability.ence-based commitments.

2. Does your company have SBTi (Science Based Targets initiative) commitments?



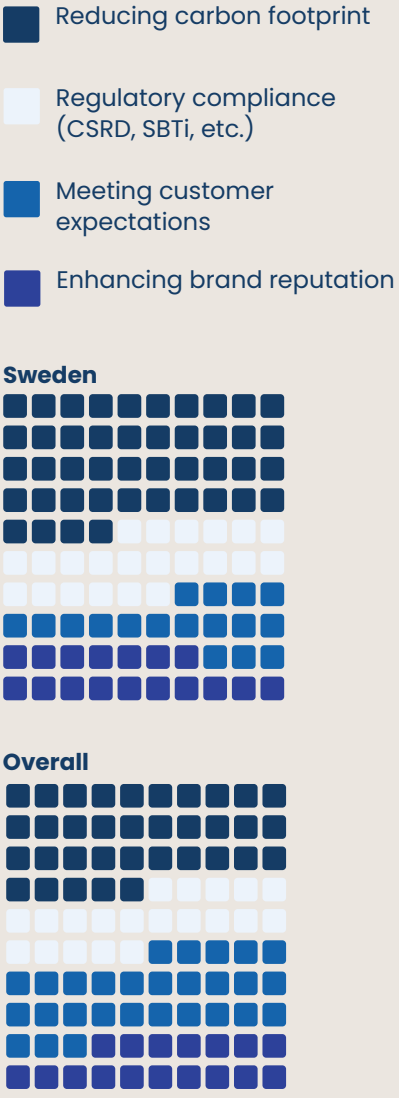
3. Main drivers for eco transport solutions

For Swedish respondents, **44%** cite reducing carbon footprint as the main driver – well above the global average of 35%. Regulatory compliance follows at **22%**, while meeting customer expectations **(17%)** and brand reputation **(17%)** are lower than global benchmarks.

The strong focus on carbon footprint reduction reflects Sweden's mature sustainability landscape, where emissions reduction is a well-established priority in both policy and corporate practice. Swedish companies are accustomed to measuring and reporting emissions, so framing eco transport in terms of footprint reduction resonates directly with existing processes and targets.

The lower emphasis on customer expectations may be explained by the domestic market context. In Sweden, sustainability is already integrated into business practices as a baseline, which reduces the need for downstream customers to apply pressure. Instead, companies see carbon reduction as an intrinsic responsibility, not just a response to external demands.

3. What are the main drivers for considering eco transport solutions?



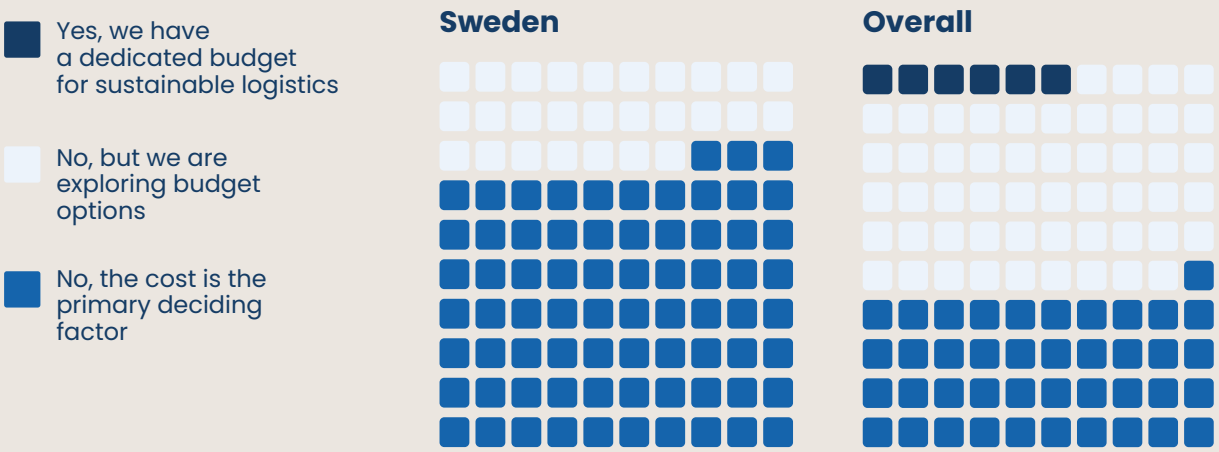
4. Fiscal commitment to sustainable logistics

In Sweden, no respondents report having a dedicated budget for sustainable transport. Only **27%** are exploring options, while a clear majority – **73%** – say cost is the primary deciding factor.

This outcome reflects the broader pattern in Sweden: while sustainability is recognized as important, it is typically considered in balance with cost and efficiency rather than as a stand-alone driver. Many companies report interest in eco solutions, but the high share citing cost as decisive shows that presentations of such solutions have not yet been compelling enough to shift budget priorities.

A possible explanation lies in Sweden's mature sustainability narrative. Since companies are already reducing carbon footprints and measuring emissions, eco logistics may be viewed as one option among many, rather than the decisive lever. As long as eco solutions remain costlier than conventional ones, Swedish firms appear reluctant to allocate dedicated budgets specifically to logistics.

4. Does your company have an allocated budget for sustainable transport solutions?



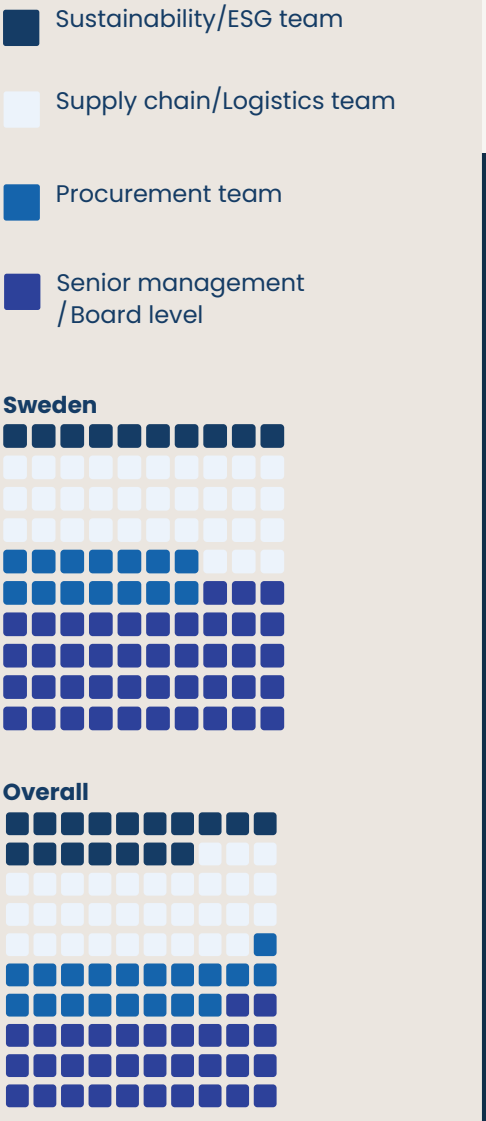
5. Decision-making & mandate

In Sweden, decision-making skews more toward senior levels than the global average. **43%** of respondents point to senior management or boards (vs. 32% globally), while sustainability teams account for only **10%** (vs. 17%). Supply chain **(33%)** and procurement **(14%)** remain close to global benchmarks.

This pattern highlights a structural contrast. Responsibility sits more often with top management, yet few companies allocate dedicated budgets for eco transport (0% in Question 4). The combination suggests that while senior leaders oversee sustainability in logistics, dedicated sustainability resources and operational ownership remain limited. This also aligns with the absence of "very important" responses in Question 1: Sustainability is treated as a strategic consideration, but not yet resourced in a way that drives decisive action in logistics.

Sweden's profile therefore reflects a top-down framing of responsibility without a corresponding bottom-up infrastructure to implement eco solutions at scale.

5. Who is responsible for making decisions about sustainable transport solutions in your company?



6. Transport mode focus

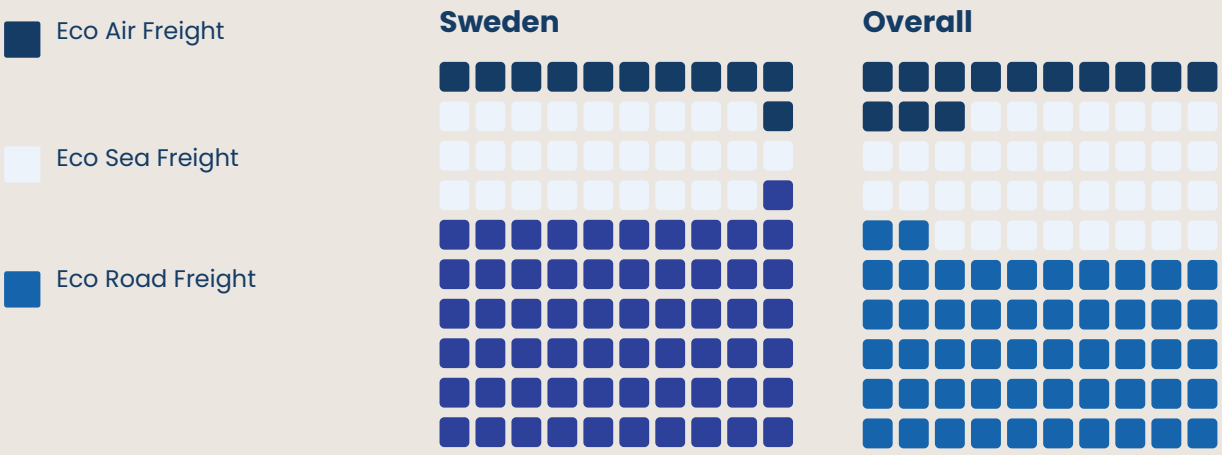
Swedish respondents show the strongest preference for road solutions: **61%**, compared with the global average of 52%. Sea follows at **28%**, and air at **11%**.

The dominance of road reflects Sweden's transport profile. Domestic freight must cover long distances across a large and sparsely populated geography, making road the primary mode. Investments in eco road transport therefore resonate more strongly with Swedish companies than in some neighboring markets.

Unlike Norway and Denmark, a share of Swedish respondents **(11%)** also show interest in air solutions. This may be explained by Sweden's reliance on air for certain high-value exports, such as technology, pharmaceuticals, and perishable goods. In these niches, reducing the climate impact of air freight is becoming more relevant, even if air remains a smaller share of overall freight volumes.

Overall, Sweden's profile emphasizes eco solutions in the modes most embedded in its logistics system – road for domestic transport, and air in selected export segments – while sea plays a secondary role compared to other Nordic countries, despite Sweden's busy and developed ports.

6. For which transport mode(s) are you most interested in eco solutions?



7. Eco solution preference

Swedish respondents favor EV freight solutions **(42%)** and alternative fuels **(33%)**, while interest in modal shift **(25%)** is below the global average, and carbon offsets **(0%)** are rejected entirely.

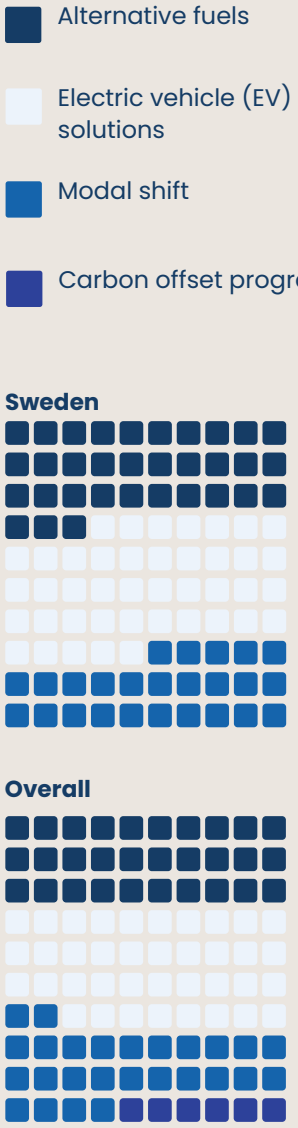
The absence of support for offsets is unsurprising. Offsets have been publicly debated and criticized in Sweden for more than a decade, and most companies now focus on direct abatement measures rather than compensation schemes.

The relatively high interest in EV solutions reflects Sweden's position as home to Volvo and Scania, both leading manufacturers of electric trucks. This domestic production base makes EV freight appear both attainable and credible, reinforcing interest among logistics decision-makers.

Lower interest in modal shift suggests that Swedish companies are prioritizing technologies that can be directly integrated into their existing road-dominant logistics systems, rather than restructuring freight flows across modes.

Overall, Swedish preferences emphasize practical, visible, and technology-driven solutions, while rejecting indirect measures like offsets.

7. Which eco transport solutions would you be most interested in?



Switzerland

Switzerland's freight logistics sector occupies a unique position in Europe – landlocked, highly developed, and deeply integrated with the broader EU market, yet governed by its own regulatory framework. Despite not being an EU member, Switzerland is closely aligned with EU climate goals and has demonstrated a strong commitment to sustainability, particularly through its national CO2 legislation, investment in renewable energy, and focus on operational efficiency.

While rail is often emphasized in Swiss transport policy, road, sea (via neighboring ports), and air freight remain critical to the country's economic flows, especially for exports of high-value goods like pharmaceuticals, precision instruments, and luxury products. These sectors are increasingly being reshaped by Switzerland's efforts to reduce emissions, increase energy efficiency, and align with European sustainability standards.

In road freight, the Swiss logistics industry is steadily shifting toward decarbonization, although at a measured pace due to the topographical and regulatory complexities of operating heavy-duty EV fleets in alpine conditions. Nevertheless, forwarders are adopting electric vehicles for last-mile and regional delivery, supported by national and cantonal incentives, and are increasingly utilizing HVO100 and biogas as interim decarbonization tools.

Switzerland's **air freight sector**, while relatively small in volume, plays an outsized role in high-value trade. It is evolving under pressure from both customer demand and EU regulations like ReFuelEU Aviation. Swiss airports are advancing their carbon neutrality goals, and air freight operators are beginning to offer SAF-inclusive services, carbon tracking, and green cargo solutions. These developments are especially relevant to export-driven industries, which are increasingly held accountable for the full environmental impact of their supply chains.

Although Switzerland lacks a coastline, it remains connected to **maritime freight routes** via key European ports – primarily through the Rhine corridor and Mediterranean gateways. Here, sustainability is addressed through collaboration with green ports, the selection of cleaner shipping lanes, and the adoption of eco-efficient intermodal solutions.

Looking ahead, Switzerland's freight logistics market will be defined by a balancing act: maintaining high

service reliability and cross-border connectivity while adapting to rapidly evolving climate standards. As the EU tightens emissions regulations across all transport modes and carbon transparency becomes a competitive differentiator, Swiss logistics firms will be compelled to step up their investments in clean technologies, emissions reporting, and digital optimization tools. Despite the absence of a broad-based carbon tax on transport fuels, the combination of EU-aligned emissions trading (especially in aviation), reputational expectations from global clients, and sector-specific sustainability targets will continue to push the industry toward lower-carbon operations.

In summary, Switzerland's freight logistics industry is quietly undergoing a transformation – driven by precision, efficiency, and pragmatism. Though the pace may be more measured than in some EU nations, the direction is unmistakably green. As climate pressures mount and the global logistics landscape evolves, Switzerland is well-positioned to lead by example in sustainable logistics through innovation, infrastructure investment, and cross-border collaboration.

Response rate

Swiss customers responded to the survey with the highest global percentage at **71%**. Their engagement carries throughout the survey responses. ■

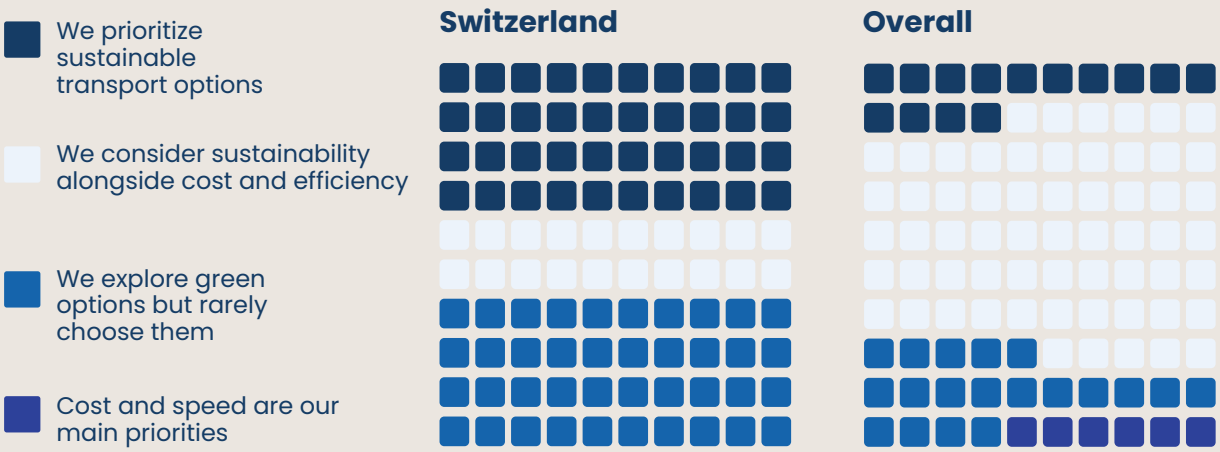
1. Importance of Sustainability

Swiss respondents report the highest level of commitment to sustainability in logistics decisions. **40%** rate it as very important – nearly three times the global average of 14% – while another **20%** see it as important. The remaining **40%** consider it somewhat important, and none rated it as not important.

This places Switzerland at the top among surveyed countries in terms of sustainability as a declared priority. The strong "very important" response rate reflects both the national policy environment, where climate commitments are ambitious and broadly supported, and the business landscape, where Swiss companies are closely linked to international supply chains and investor scrutiny.

The sizeable share in the "somewhat important" category, however, indicates that while many companies elevate sustainability above cost, others are still treating it as an optional factor rather than a decisive one. This split suggests a market with both leaders and cautious followers – but with sustainability firmly on the agenda for all.

1. How important is sustainability in your company´s logistics decisions?



2. Commitment to Sustainability

Swiss respondents unanimously report having internal sustainability goals, but none are currently engaged with the Science Based Targets initiative (SBTi). **100%** of respondents fall into the category of "other internal goals," compared with 55% globally.

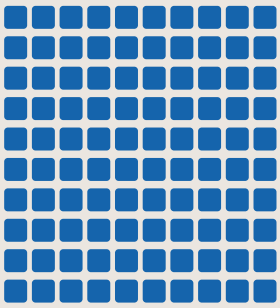
This result shows that while climate action is clearly a priority – consistent with the high share of companies rating sustainability as very important – SBTi has not yet gained traction as the preferred validation framework among LEMAN's Swiss customers. The reliance on internal goals may reflect confidence in company-driven approaches, or a preference for flexibility over the administrative and technical requirements of SBTi.

Given Switzerland's strong regulatory and financial environment, this lack of SBTi adoption is notable. It suggests that while Swiss companies are proactive in setting sustainability commitments, they are not yet aligning with external standards in the same way as peers in other markets.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

Switzerland



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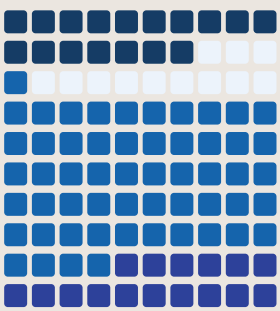


3. Main drivers for eco transport solutions

Swiss respondents report a sharply different profile from the global average. **71%** cite reducing carbon footprint as the main driver – double the global share – followed by **29%** citing regulatory compliance. Not a single respondent mentioned customer expectations or brand reputation.

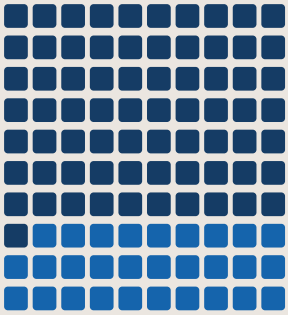
This result reflects Switzerland's "intrinsic" approach to sustainability. Companies appear motivated primarily by measurable environmental outcomes and compliance with regulatory frameworks, rather than by external market pressures or reputational benefits. The absence of customer expectations as a driver may be explained by Switzerland's role as a hub for multinational companies: many firms already operate within strong sustainability frameworks, reducing the need for customers to exert additional pressure. Similarly, brand reputation is likely considered a given in a market where environmental responsibility is already expected, and therefore less of a differentiator.

Taken together, the Swiss profile underscores a direct, internally anchored motivation for sustainability. The focus is less on responding to outside demands and more on meeting carbon reduction objectives and regulatory requirements.

3. What are the main drivers for considering eco transport solutions?

- Reducing carbon footprint
- Regulatory compliance (CSRD, SBTi, etc.)
- Meeting customer expectations
- Enhancing brand reputation

Switzerland



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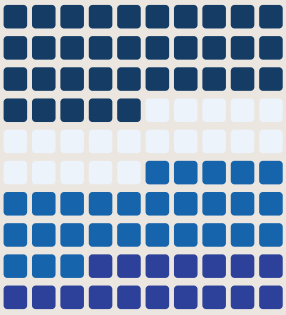


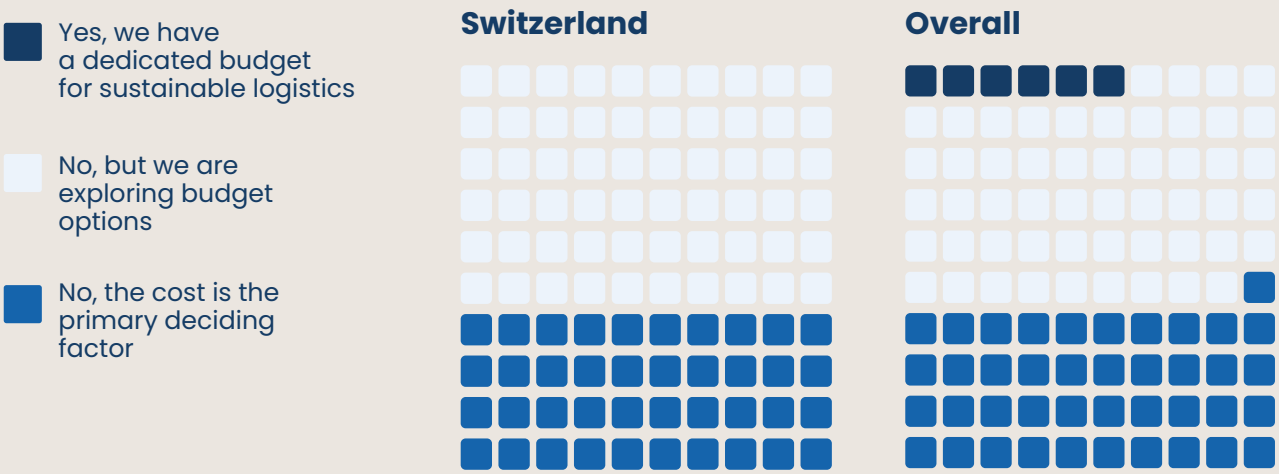
4. Fiscal commitment to sustainable logistics

None of the Swiss respondents currently report a dedicated budget for sustainable transport. **60%** are exploring budget options, while **40%** say cost remains the primary deciding factor.

This indicates that fiscal commitment has not yet caught up with Switzerland's strong stated importance of sustainability. The willingness to explore budgets suggests movement in that direction, but actual allocation is still pending. One possible explanation is that Swiss companies are currently prioritizing measurement and reporting frameworks. In Switzerland's financial and investor-driven environment, disclosure and accountability often take precedence, with capital allocation to follow once standards and expectations are fully defined.

This pattern reflects an investor-led dynamic: sustainability is recognized as strategically important, but operational budgets – especially for logistics – are slower to materialize.

4. Does your company have an allocated budget for sustainable transport solutions?



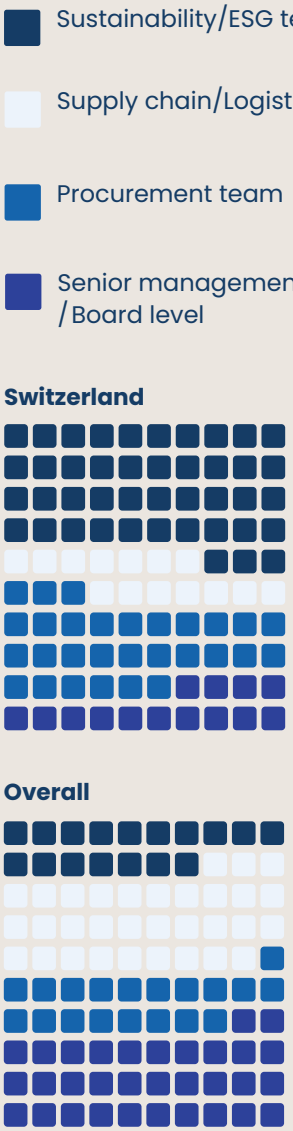
5. Decision-making & mandate

Switzerland stands out as the clear outlier in decision-making structures. **43%** of respondents place responsibility with sustainability or ESG teams, compared with only 17% globally. Procurement follows at **29%**, supply chain at **14%**, and senior management also at **14%** – the lowest share of top-level responsibility among all surveyed markets.

This strong delegation to ESG teams helps explain Switzerland's high level of commitment to sustainability. Decision-making is embedded in specialized functions with a mandate to prioritize environmental considerations, rather than being filtered primarily through cost-driven supply chain or procurement teams. The comparatively small role of senior management suggests that sustainability is already institutionalized within organizational structures and no longer dependent on top-level champions.

The Swiss model illustrates how dedicated ESG ownership can elevate sustainability beyond rhetoric and into practical decision-making. It also contrasts with markets such as Sweden, where senior management dominates but budget allocation is weak.

5. Who is responsible for making decisions about sustainable transport solutions in your company?



6. Transport mode focus

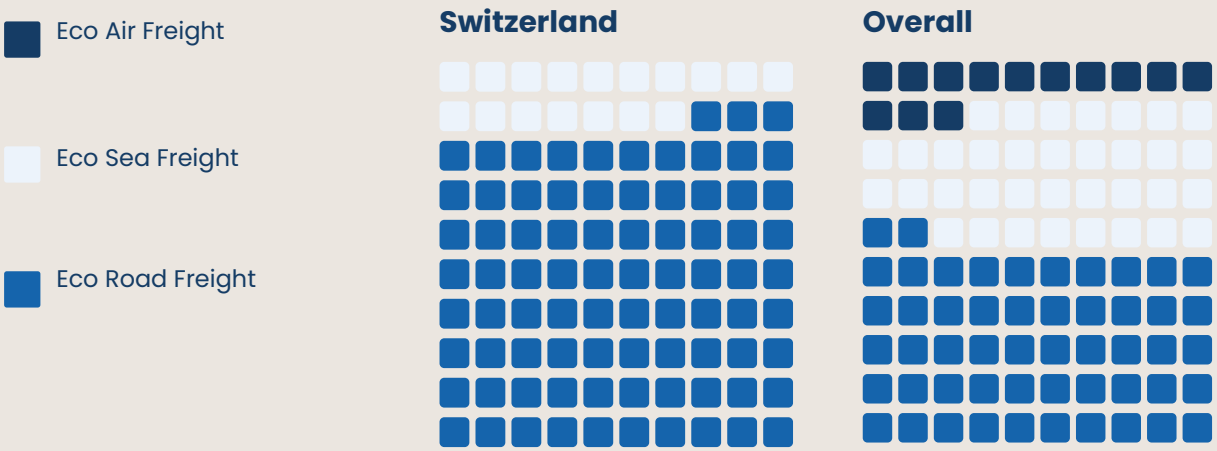
Swiss respondents show a clear preference for road solutions, with **83%** selecting this mode, compared with a global average of 52%. Sea follows at **17%**, while **none** reported interest in air solutions.

This result is consistent with Switzerland's geography and transport profile. As a landlocked country with mountainous terrain, most freight moves by road, either domestically or as part of cross-border transport into neighboring markets. Eco road solutions therefore represent the most immediate and visible opportunity to reduce emissions in Swiss logistics.

The lack of interest in air is unsurprising, given its limited role in the Swiss transport mix outside of niche, high-value cargo. Sea also ranks low, reflecting Switzerland's lack of direct port access and reliance on neighboring countries for maritime trade.

Overall, the Swiss profile reinforces how geography and infrastructure shape modal priorities: in a road-dominant country, decarbonization efforts are naturally concentrated on the mode that carries the majority of goods.

6. For which transport mode(s) are you most interested in eco solutions?



7. Eco solution preference

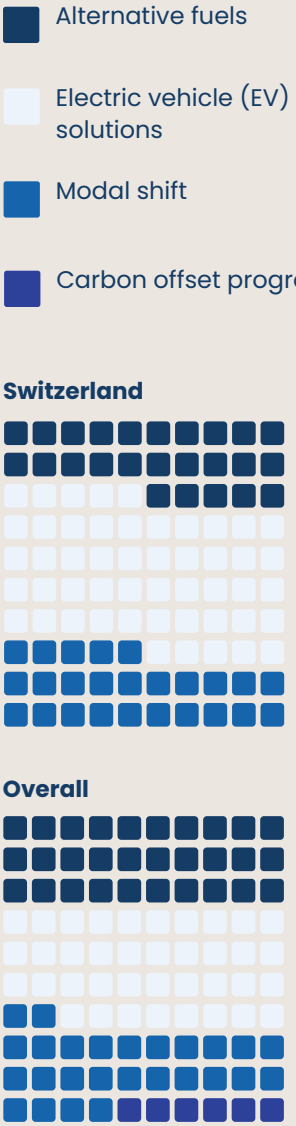
Swiss respondents show a clear preference for road-focused solutions, consistent with their modal priorities. **50%** selected EV freight as their top choice, compared with 38% globally. Alternative fuels **(25%)** and modal shift **(25%)** follow at equal levels, while carbon offsets receive no interest.

The strong tilt toward EV freight reflects both Switzerland's road-dominant transport system and its national context. The country already has one of Europe's most developed charging infrastructures, and government incentives have supported rapid adoption of electric passenger vehicles. This familiarity and infrastructure base make EV freight a logical extension in the logistics sector.

The lack of interest in carbon offsets aligns with Switzerland's broader regulatory and investor environment, where direct emission reductions are emphasized over compensation schemes. Alternative fuels and modal shift attract some attention but are secondary to EVs, suggesting that Swiss companies prioritize solutions that can be directly integrated into existing road operations.

Overall, Switzerland stands out as a market where electric freight is seen not just as viable, but as the preferred pathway to decarbonizing logistics.

7. Which eco transport solutions would you be most interested in?



United Kingdom

The UK freight logistics market is at a pivotal juncture, transitioning from foundational policy setting to tangible implementation of sustainability initiatives across road, sea, and air freight. As a highly developed, service-driven economy with substantial trade flows, the UK faces both unique challenges and compelling opportunities in decarbonizing its logistics sector. Despite the complexities introduced by its post-Brexit regulatory independence, the UK remains largely aligned with EU climate ambitions and is steadily building its own frameworks to drive green transformation in transport and logistics.

In **road freight**, the UK is making demonstrable progress through electrification pilots, retrofitting programs, and low-emission zones in major cities. Though electric truck adoption is still at an early stage, the combined forces of customer demand, policy incentives, and reputational risk are expected to drive significant acceleration by the end of the decade. The use of biofuels like HVO and biomethane is also gaining traction as a near-term emissions reduction tool, particularly among SMEs and long-haul operators.

Air freight, while contributing a smaller share of overall volumes, plays a disproportionately large role in value-driven and time-sensitive UK trade. The expansion of Sustainable Aviation Fuel (SAF) programs and low-emission freight offerings by carriers and logistics providers is an important signal of future market direction.

In **maritime freight**, although the UK does not control major vessel fleets, its influence lies in port operations and logistics coordination. Strategic port hubs such as Felixstowe, Southampton, and Liverpool are beginning to incorporate renewable energy, electrified equipment, and shore power capabilities to align with the growing demands of green shipping corridors.

The **regulatory environment** is evolving in parallel. The UK Emissions Trading Scheme (UK ETS), fuel duty structure, vehicle standards, and clean air zones are shaping a more carbon-conscious logistics landscape. While there is currently no dedicated carbon tax on freight transport, the direction of travel is clear: emissions will increasingly carry a cost – either through direct pricing, compliance obligations, or reputational pressures in the global supply chain.

In summary, the UK's freight logistics sector is not just responding to sustainability pressures – it is entering a transformative phase where climate

alignment will define long-term competitiveness. While barriers remain, including technology availability, infrastructure build-out, and cost parity, the momentum is increasingly in favor of green innovation. With government, industry, and consumer forces converging around net-zero goals, the future of UK freight logistics is clearly oriented toward lower emissions, greater efficiency, and smarter, cleaner transport systems.

Response rate

The response rate from the UK stands rather high at **33%** – slightly higher than the global response rate of 28%. ■

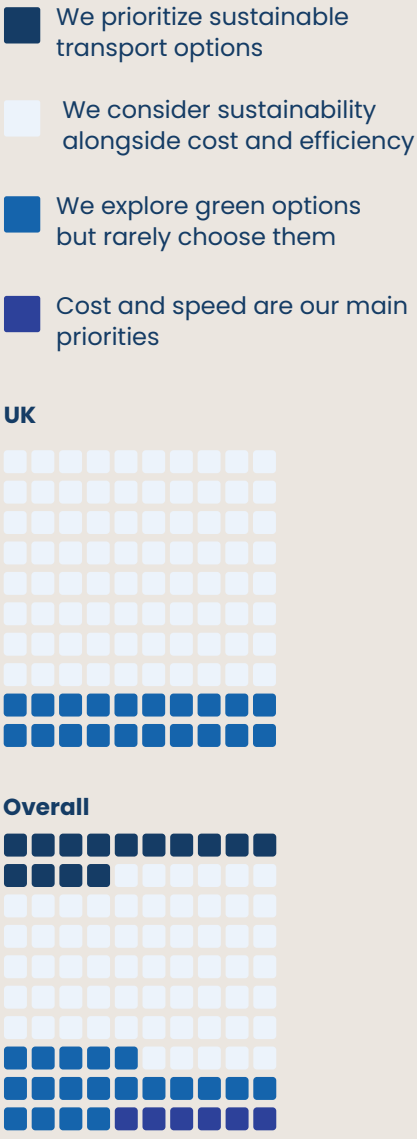
1. Importance of Sustainability

UK respondents show a uniform middle-ground profile: **80%** rate sustainability as important and **20%** as somewhat important. None place it as very important, and none dismiss it as not important.

This pattern indicates broad penetration of sustainability considerations, but with a more settled, pragmatic stance. Unlike Switzerland or pharma customers, where larger shares elevate sustainability above cost, UK respondents appear to see it as a standard factor that must be balanced with efficiency and price.

An explanation may lie in the UK's policy and market environment. With mandatory disclosure frameworks (such as TCFD) already in place, sustainability is no longer viewed as optional but has also lost some of its novelty as a differentiator. Instead, companies approach it as a compliance and operational requirement, ensuring it is accounted for but rarely elevated above cost or efficiency in logistics decisions.

1. How important is sustainability in your company´s logistics decisions?



2. Commitment to Sustainability

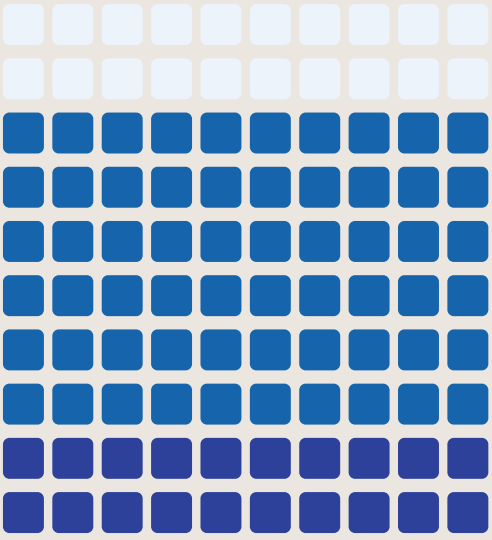
The UK responses track the global pattern with one interesting variation: **None** have approved SBTi targets compared to the 17% of global responses, **20%** are in the process of setting them, **60%** report other internal goals, and **20%** have no specific targets.

Sustainability targets and commitments closely follow the global benchmark, with slightly smaller adoption of SBTi as a validation mechanism. Nonetheless, 1 in 5 are engaged with SBTi in the process of setting targets, which may reveal a latent adoption of the framework compared to other countries.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

UK



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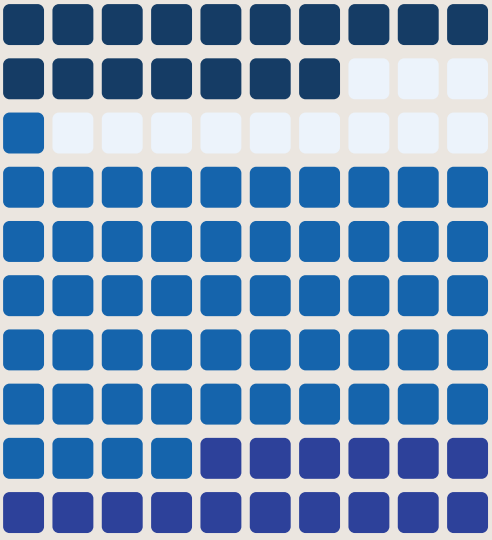


3. Main drivers for eco transport solutions

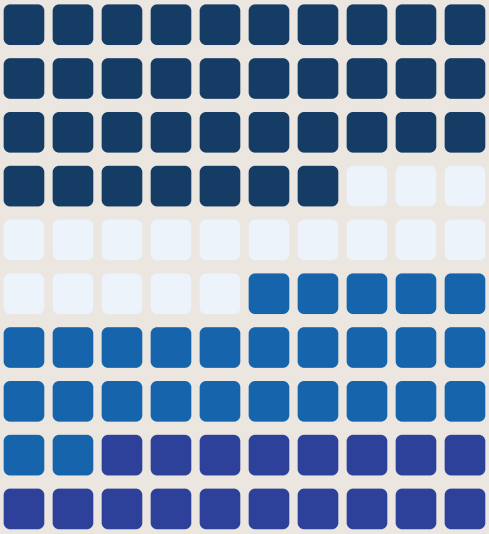
The UK responses fall well in line with the global benchmark, deviating no more than 2 percentage points from the global responses. **37%** cite reducing carbon footprint as the main driver – slightly above the global average of 35%. Meeting customer expectations follows at **27%**, and regulatory compliance and brand reputation complete the picture, both at **18%.**

These results paint sustainable logistics as driven by a variety of reasons in relative balance. Conversely, there is no single dominant driver for eco transport solutions in the UK, revealing the country's maturity and awareness of the multiple benefits of sustainability.

3. What are the main drivers for considering eco transport solutions?

- Reducing carbon footprint
- Regulatory compliance (CSRD, SBTi, etc.)
- Meeting customer expectations
- Enhancing brand reputation

UK



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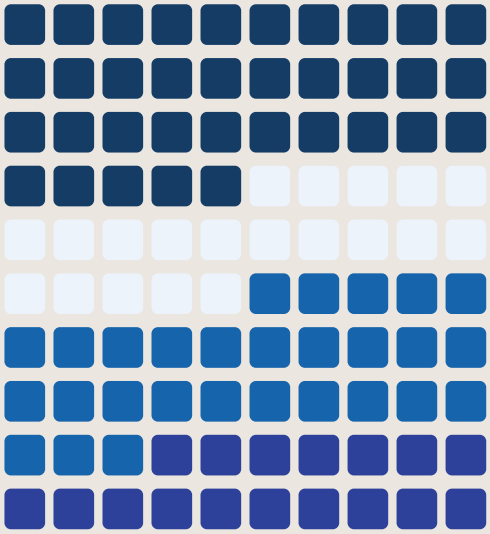


4. Fiscal commitment to sustainable logistics

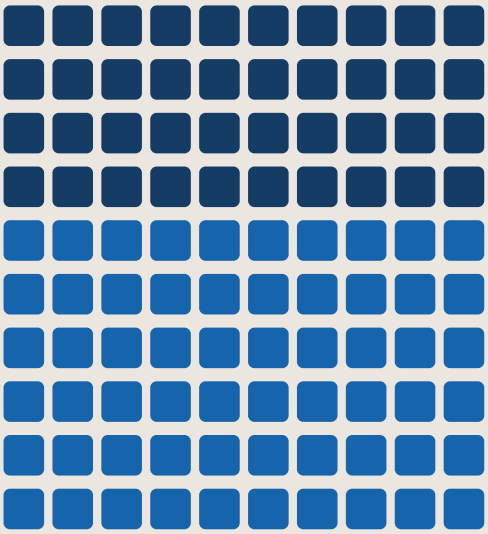
The UK's fiscal commitment to sustainable transportation quickly reveals a whopping comparison with the global benchmark, as well as every other country individually. It also reveals a larger divide within the UK market: **40%** of respondents have a dedicated budget for sustainable logistics – the highest percentage across countries, while **60%** -20% more than the global benchmark- cite cost alone as the primary decisive factor. There were no respondents in between, currently exploring a budget.

British companies have either cemented their targets with the budget or cemented their decision not to commit fiscally.

4. Does your company have an allocated budget for sustainable transport solutions?

- Yes, we have a dedicated budget for sustainable logistics
- No, but we are exploring budget options
- No, the cost is the primary deciding factor

UK



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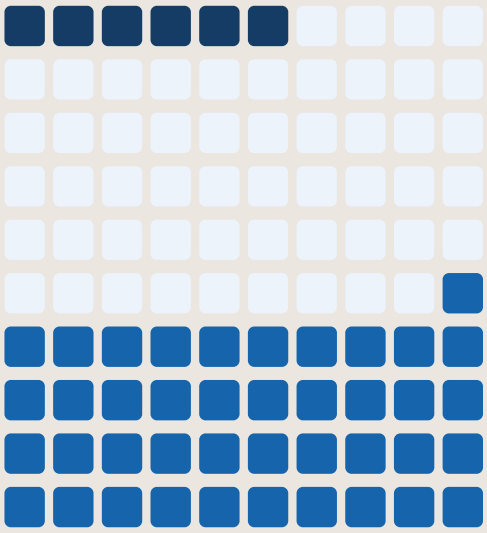


5. Decision-making & mandate

In the UK, no respondents reported sustainability or ESG teams as the decision-makers for eco transport. Instead, responsibility is split between senior management **(38%)**, supply chain teams **(37%),** and procurement **(25%)**.

This distribution highlights a structural difference from markets like Switzerland, where ESG teams play a leading role. In the UK, sustainability decisions are embedded within traditional operational and management functions. This may reflect how many UK companies treat sustainability: As a cross-cutting consideration integrated into existing departments rather than a separate function with its own mandate.

The strong share for senior management suggests that direction still comes from the top, but without dedicated teams, follow-through is likely managed by logistics and procurement, where cost and efficiency remain core concerns. This balance reinforces the earlier picture of the UK as a "pragmatic middle" market – sustainability is accounted for, but primarily through existing structures rather than specialized ESG functions.

5. Who is responsible for making decisions about sustainable transport solutions in your company?

6. Transport mode focus

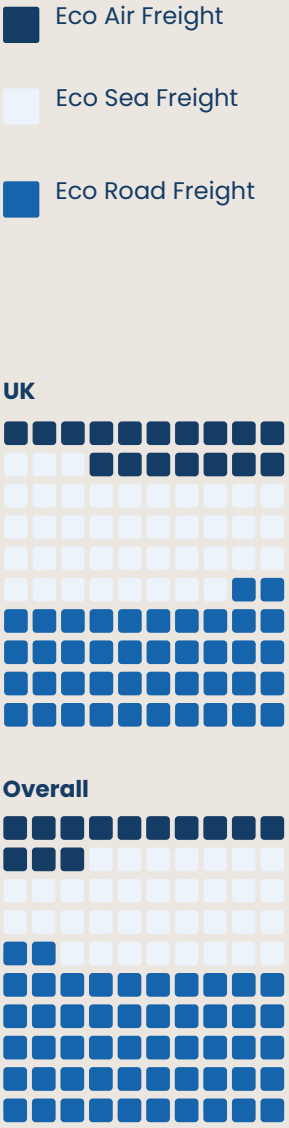
UK respondents show a relatively balanced profile across transport modes: **42%** are most interested in road solutions, **41%** in sea, and **17%** in air. Compared with the global benchmark, this indicates a slightly higher interest in both sea and air freight.

The stronger weight on sea reflects the UK's heavy reliance on maritime imports and exports, as an island economy where ports handle the majority of trade flows. Sustainability efforts in this mode are particularly relevant given regulatory developments around shipping emissions in European waters.

Air also receives more attention than the global average. This may be linked to the UK's strong role as a global trading hub, with high-value goods often shipped by air, as well as ongoing debate around decarbonizing aviation within national policy.

Overall, the UK results show that eco-transport interest extends beyond road – the global dominant mode – towards solutions in sea and air, reflecting the country's geographic position and trade structure.

6. For which transport mode(s) are you most interested in eco solutions?



7. Eco solution preference

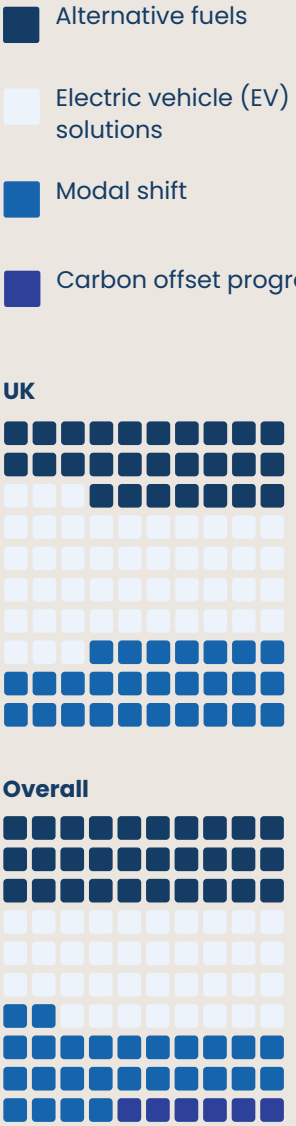
UK respondents show a strong preference for electrification, with **46%** selecting EV freight solutions, compared with 38% globally. Alternative fuels and modal shift each attract **27%**, while carbon offsets receive **no support.**

The lack of interest in offsets reflects the UK's public discourse. Investigations by The Guardian and other media exposed flaws in offset programs, fueling skepticism and shifting attention toward solutions that deliver direct, verifiable emission reductions.

The stronger interest in EVs can be tied to the UK's wider electrification agenda. The government has committed to phasing out internal combustion engines for cars and vans, and the charging infrastructure network is expanding rapidly. This broader policy and investment environment likely raises confidence in EV freight solutions as the most tangible and future-proof decarbonization pathway.

Alternative fuels and modal shift retain a role, but the clear tilt toward EVs suggests UK companies are aligning their logistics strategies with the national direction on electrification, while avoiding solutions perceived as indirect or less reliable, such as offsets.

7. Which eco transport solutions would you be most interested in?



United States of America

The United States freight logistics sector is undergoing a foundational shift as sustainability, central to both regulatory planning and commercial competitiveness with the previous administration, is less prioritized with the present Trump administration. As one of the world's largest and most diversified logistics ecosystems, the U.S. faces unique challenges in decarbonizing its freight networks due to its vast geography, modal fragmentation, and legacy infrastructure. Yet, the convergence of federal investment, state-level leadership, and mounting pressure from global customers is accelerating progress toward a lower-carbon future across all major freight modes.

In **road freight**, the sustainability transformation is gaining serious traction. The U.S. government's commitment to electrifying medium- and heavy-duty vehicles through corridor buildouts, public-private partnerships, and incentive programs is beginning to reshape the landscape for logistics operators. The rise of battery-electric and hydrogen fuel cell trucks, particularly in California and other forward-leaning states, signals a shift from pilot projects to broader fleet transitions. In parallel, interim technologies – such as renewable diesel, biofuels like HVO, and hybrid systems – are playing a crucial role in reducing emissions before full electrification is feasible.

In the **air freight** domain, decarbonization remains complex but increasingly unavoidable. U.S. air cargo carriers and airport authorities are beginning to integrate **Sustainable Aviation Fuel (SAF)** into their services, often driven by pressure from multinational shippers seeking to meet Scope 3 emissions targets. While SAF availability and cost remain key barriers, federal tax credits and emerging green fuel alliances are helping improve access.

For **maritime freight,** the U.S. is taking a leadership role in **port decarbonization**, even though it is not a dominant player in global ship ownership. Major ports, like Los Angeles, Long Beach, and New York/New Jersey, are advancing in areas such as shore power infrastructure, electrification of yard equipment, and adoption of renewable energy. These developments are key to enabling **green shipping corridors**, which allow sea freight movements to align with shipper carbon goals.

Crucially, the U.S. does not currently impose a nationwide carbon tax or

universal emissions pricing mechanism for freight, which slows the market signals needed for rapid investment. However, regulatory mechanisms like California's Advanced Clean Fleets rule, the Low Carbon Fuel Standard, and emerging clean air mandates in cities are beginning to act as de facto carbon cost drivers.

In short, the U.S. freight logistics market is at an inflexion point. While progress is uneven and systemic challenges remain – ranging from infrastructure gaps to fleet turnover timelines – the direction of travel is increasingly clear. Sustainability is becoming a license to operate in the freight space, with early movers positioned to lead as regulatory clarity, funding availability, and customer expectations continue to intensify. The future belongs to those logistics players who can merge technological innovation, policy alignment, and strategic foresight to create freight solutions that are not only efficient and cost-effective but also carbon-conscious and future-ready.

Response rate

The response rate from the USA was the lowest across the surveyed countries at **9%**. As such, **we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison**. Nonetheless, the standalone results are presented below, and we consider them to only serve as a loose reference. ■

1. Importance of Sustainability

The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

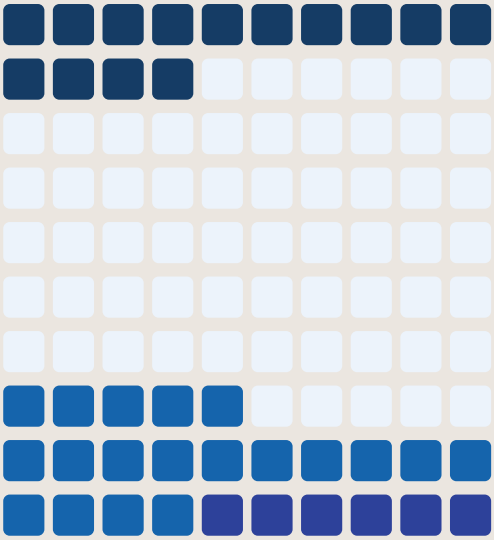
The data presented below serve only as reference.

1. How important is sustainability in your company´s logistics decisions?

- We prioritize sustainable transport options
- We consider sustainability alongside cost and efficiency
- We explore green options but rarely choose them
- Cost and speed are our main priorities

US

Overall



2. Commitment to Sustainability

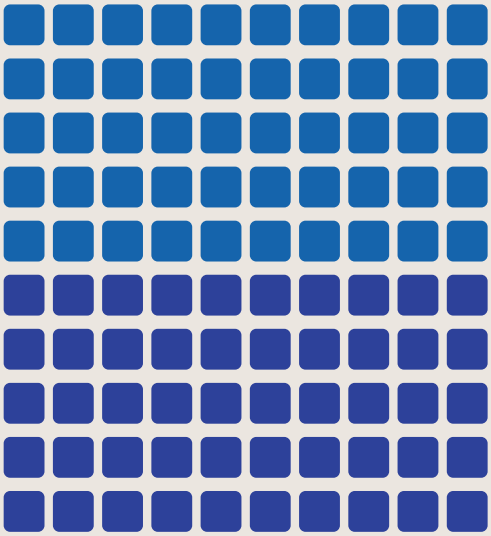
The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

The data presented below serve only as reference.

2. Does your company have SBTi (Science Based Targets initiative) commitments?

- Yes, we have approved SBTi targets
- We are in the process of setting SBTi targets
- No, but we have other internal sustainability goals
- No, we do not have specific sustainability targets

US



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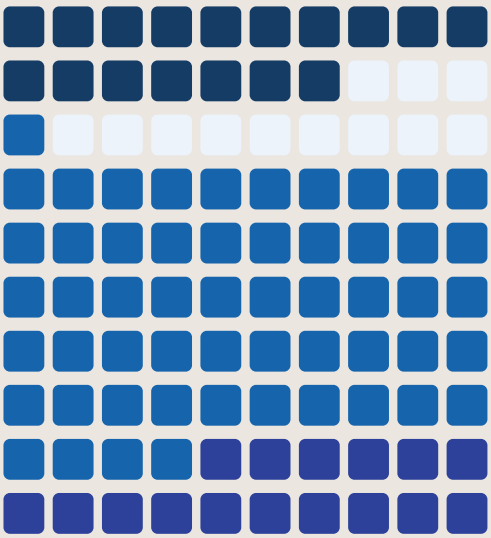


3. Main drivers for eco transport solutions

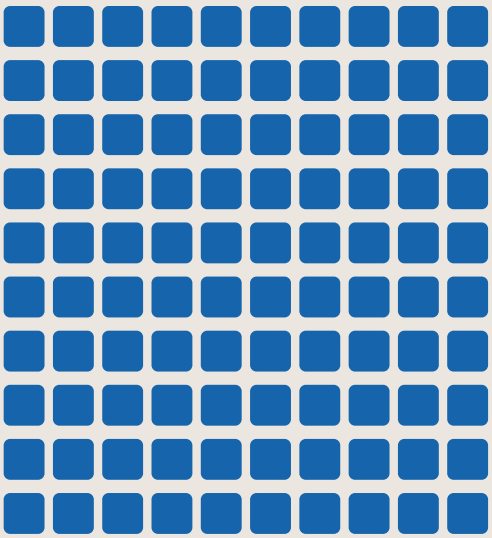
The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

The data presented below serve only as reference.

3. What are the main drivers for considering eco transport solutions?

- Reducing carbon footprint
- Regulatory compliance (CSRD, SBTi, etc.)
- Meeting customer expectations
- Enhancing brand reputation

US



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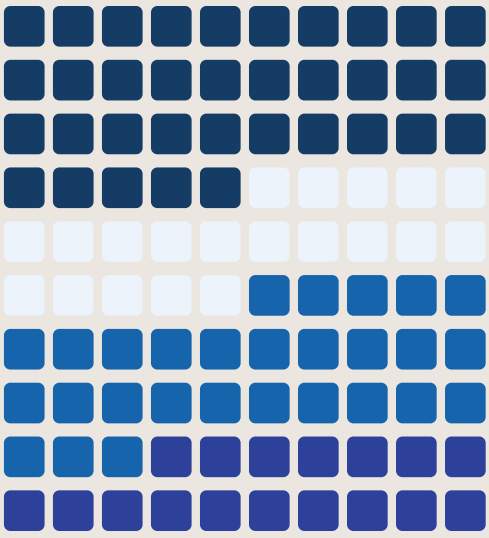


4. Fiscal commitment to sustainable logistics

The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

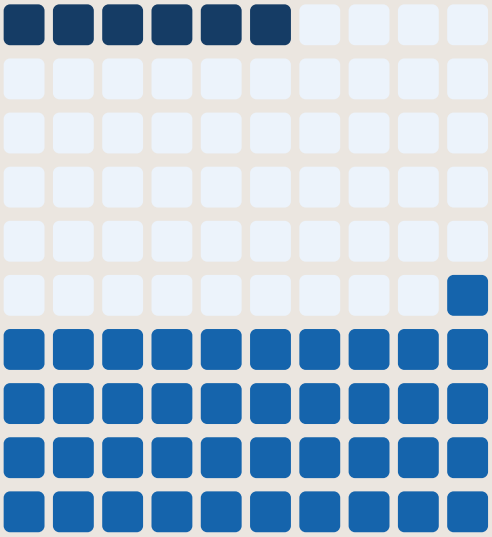
The data presented below serve only as reference.

4. Does your company have an allocated budget for sustainable transport solutions?

- Yes, we have a dedicated budget for sustainable logistics
- No, but we are exploring budget options
- No, the cost is the primary deciding factor

US

Overall



5. Decision-making & mandate

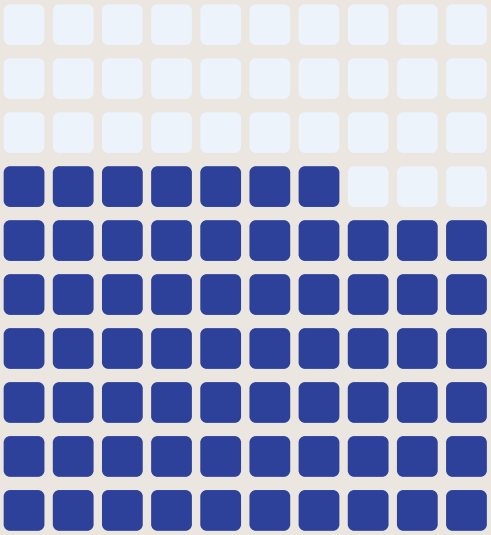
The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

The data presented below serve only as reference.

5. Who is responsible for making decisions about sustainable transport solutions in your company?

Sustainability /ESG team
Supply chain/ Logistics team
Procurement team
Senior management /Board level

US



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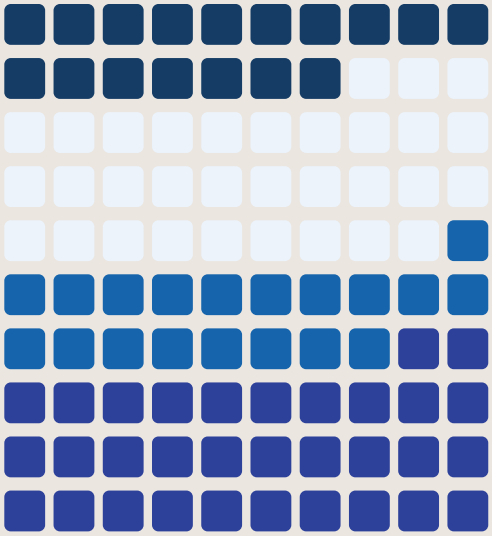


6. Transport mode focus

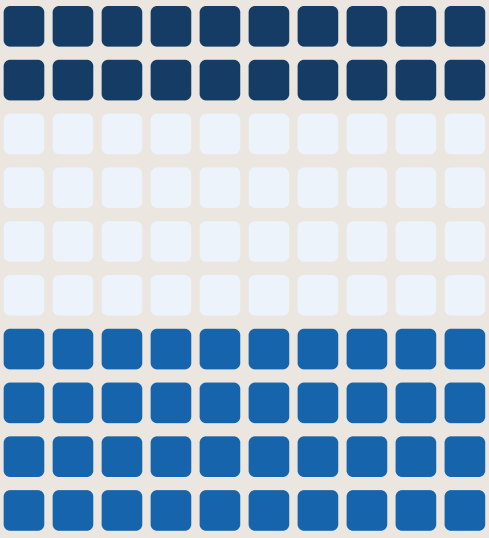
The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

The data presented below serve only as reference.

6. For which transport mode(s) are you most interested in eco solutions?

Eco Air Freight
Eco Sea Freight
Eco Road Freight

US



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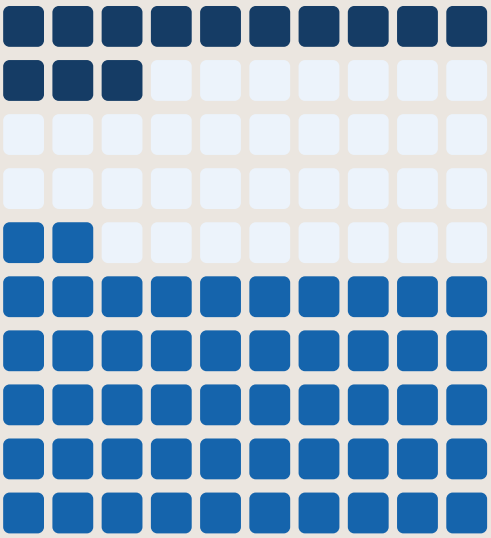


7. Eco solution preference

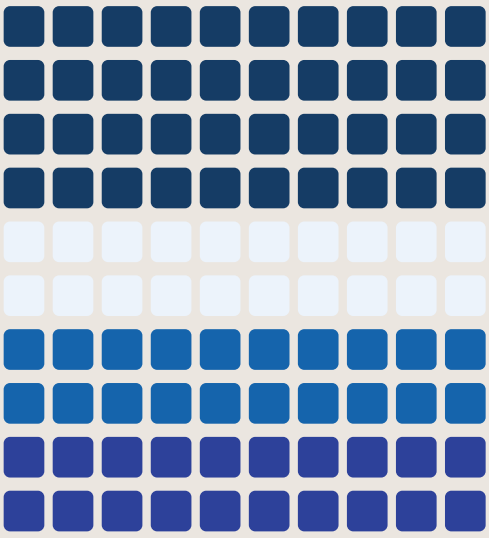
The responses in rate and absolute numbers are insufficient. As such, we do not consider the results representative of our customer base in the US and do not draw any definitive conclusions, analyses, or basis for comparison.

The data presented below serve only as reference.

7. Which eco transport solutions would you be most interested in?

- Alternative fuels
- Electric vehicle (EV) freight solutions
- Modal shift
- Carbon offset programs

US



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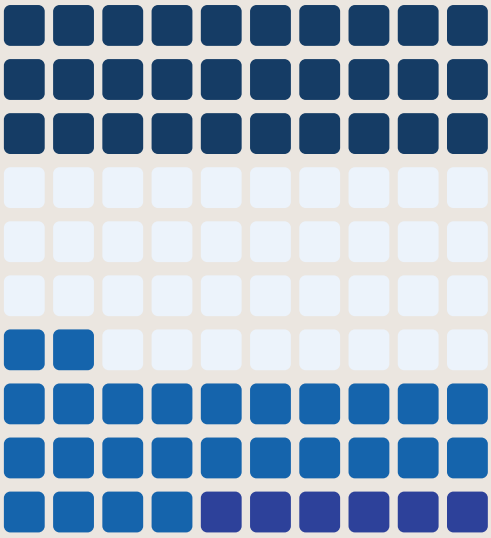

Concluding Remarks

Taken together, the results paint a cautiously optimistic picture for sustainable logistics. Across markets, budgets for eco transport are increasingly being explored, and commitments to externally validated targets such as SBTi are gaining traction. The combination of fiscal exploration and growing external validation suggests momentum is building toward broader adoption of sustainable transport practices.

The pharma segment confirms expectations of higher maturity. With stronger commitments, clearer fiscal allocation, and pronounced demand for eco solutions, pharma customers highlight what a fully engaged sector can look like when regulatory pressure and brand sensitivity converge.

In terms of eco solutions, preferences are relatively evenly distributed across modes and solution types, with the notable exception of carbon offsets, which are steadily losing relevance as companies prioritize direct emission reductions. Drivers are still led by intrinsic motivations – most prominently, reducing carbon footprint. Yet when external levers are combined – regulation, customer demand, and brand reputation – they form a slight majority, underscoring the influence of both internal goals and external pressure in shaping decisions.

Regionally, the Nordics stand out for the high importance placed on sustainability and for being largely in an exploratory phase on budgets. However, the findings also suggest that sustainable logistics in the region are still treated as a supplier obligation rather than a shared responsibility across the supply chain. True progress will require stronger collaboration and cost-sharing across stakeholders.

Switzerland was a notable surprise. While not prolific in public target validation, Swiss respondents revealed a mature and deeply embedded approach to sustainability, marked by clear priorities and institutionalized ESG governance.

The UK presents a different profile: adoption appears broader but uneven. The most advanced respondents are highly engaged and aligned with national policy momentum, while laggards remain further behind than their counterparts in other regions. This polarization suggests a market moving forward, but at different speeds across companies.

Overall, the results reveal a global community in motion. While differences across regions and sectors remain, the trajectory points toward increasing integration of sustainability into logistics decision-making, with clear signs that exploration is giving way to structured commitments. ■