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REPORT

The next phase for *electric* haulage

A report on Swedish hauliers' intentions to transition to electric trucks – and the conditions needed to scale adoption.

Electrification has started – but scaling depends on making it investable

Electric trucks are already part of Swedish haulage. The question now is whether the conditions are in place for the broader market to follow. A recent survey conducted by Implement Consulting Group together with Sveriges Åkeriföretag shows that electric trucks have moved from policy ambition and industry discussion into practical use. Electric truck adoption is already underway, with 31% of surveyed hauliers operating them and all current users indicating some level of future investment intent. This is an important confidence signal: **where electric trucks fit operational needs, experience appears to support continued scaling.**

But the transition is not yet broad-based. Adoption remains uneven across haulier size: larger hauliers account for a disproportionate share of current electric truck ownership, while adoption among the smallest operators remains limited. This points to three distinct transition groups, each with its own barriers and support needs: **front-runners** that are already investing and preparing to scale, **conditional adopters** that are interested but waiting for better conditions, and **non-ready operators** that do not yet see a viable operational or commercial case under current conditions.

The survey therefore suggests that the market is in transition rather than approaching full conversion. Electrification is commercially relevant, but still selective. The next phase will depend less on proving that electric trucks can work in some cases, and more on making the transition commercially and operationally viable for a broader range of hauliers.

Executive summary

The survey highlights five main conclusions.

1. **Electric trucks have entered Swedish haulage, but adoption remains uneven.**
   Electric trucks are already in commercial operation among surveyed hauliers, but adoption is concentrated among larger operators and remains limited among smaller fleets.

2. **The market is splitting into three transition groups.**
   26% of respondents are already scaling electric trucks. Others are interested but waiting for better conditions. A third group does not yet see a credible operational or commercial case.

3. **The main barrier is investability.**
   The majority of respondents identify commercial barriers such as purchase cost, uncertain residual value, and customer willingness to pay as the main reasons for not investing in electric trucks.

4. **Operational fit determines where electrification works today.**
   Electric trucks are suitable in some use cases, especially where routes, charging windows, payload needs, and depot access align. In other operations, range, payload, model availability, route-based charging, or charging time remain limiting factors.

5. **Scaling requires coordinated action from policy, buyers, infrastructure actors, and industry.**
   Hauliers are asking for predictable long-term support, clearer customer demand, better charging conditions, and policies that reduce both upfront cost and investment risk.

The central message is clear: **the transition to electric trucks has started, but scaling now depends on making electrification investable for the many and not only feasible for the few.**

About the survey

This report is based on survey responses from Swedish hauliers. The survey was conducted in May 2026, with a total of 154 responses. The survey captures hauliers' current use of electric trucks, investment plans, perceived barriers, customer signals, charging readiness, and requested policy measures. The table below shows the distribution of respondents by haulier size, measured by the number of vehicles owned.

Number of vehicles owned	1-5	6-10	11-30	31-50	51-100	100+	No trucks owned
% of respondents	32%	16%	21%	11%	4%	10%	6%

The findings should be interpreted as survey results from participating respondents, rather than as a statistically representative measurement of the entire Swedish haulage market. Where the report refers to 'the market', this should be understood as an interpretation based on the survey responses.

1. The transition has started, but the market is not yet at scale

Electric trucks have established a foothold in Swedish haulage. Survey responses show that a significant minority (31%) of hauliers already operate one or more electric trucks, indicating that the transition has moved beyond discussion and into practical deployment.

However, this does not mean that the market has reached broad-scale conversion. Uptake remains uneven, especially across haulier fleet sizes, measured by the number of vehicles owned, as shown in Exhibit 1. Larger hauliers account for a disproportionate share of current electric truck ownership, while adoption among the smallest operators remains limited.

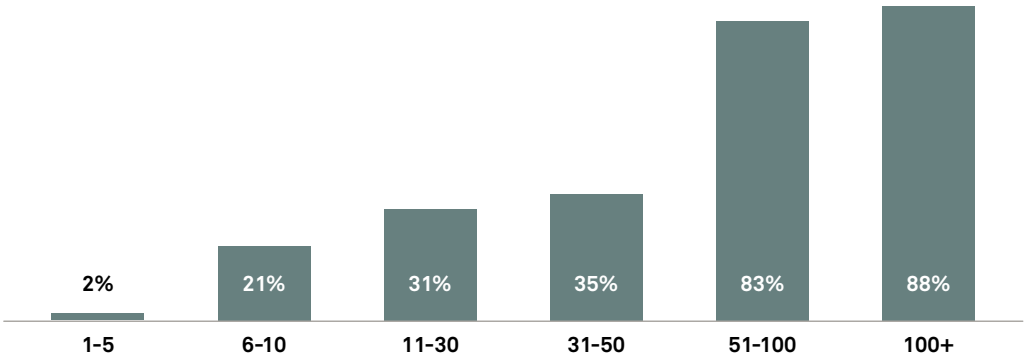


Exhibit 1: Share of hauliers owning one or more electric trucks, by haulier fleet size (%)

At the same time, adoption is not limited to one narrow segment. The survey shows electric truck ownership among hauliers with regional, national, and, to a more limited extent, international operations. Uptake appears across several activity types, including long-haul, construction, refrigerated transport, environmental transport and distribution, although some segments have higher adoption rates than others. This suggests that viable use cases are emerging across multiple parts of the sector, rather than being confined to a single niche.

The strongest confidence signal comes from existing users: 83% of current electric truck operators report plans for further investment within the next 2 to 5 years. Notably, none of the current users reported having no plans for further investment in electric trucks in the coming years. This suggests that, where the operational and economic case works, **experience with electric trucks supports continued scaling rather than disengagement.**

Hence, the market has entered a new phase where electric trucks are no longer theoretical: they are commercially relevant. However, adoption remains selective, and the conditions that enable some hauliers to move are not yet in place for all.

2. Hauliers are splitting into three transition groups

The Swedish haulage market is not moving toward electrification as one homogeneous group. The survey suggests the emergence of three broad transition groups: **front-runners, conditional adopters, and non-ready operators**, as illustrated in Exhibit 2.

	Front-runners	**Conditional adopters**	**Non-ready operators**
Definition	Have electric trucks today and plan to invest more	Do not reject electrification: plan investment within 24 months/5 years or answer 'uncertain'	No current electric trucks and no investment plans
Archetype	Owns 50+ vehicles, operates regionally, nationally, and internationally	Owns 1-50 trucks, operates regionally, nationally, and internationally	Owns 1-5 vehicles, inclination towards national and international transport
Indicative % of total respondents	26%	44%	30%
Investment posture	Scaling	Waiting / conditional	Not investing
Top three barriers to invest, % of respondents*	-	1. Vehicle purchase cost (46%) 2. Customer WTP** (28%) 3. Vehicle range (19%)	1. Vehicle purchase cost (57%) 2. Vehicle range (52%) 3. Customer WTP (37%)
Commercial vs operational barriers	-	64% vs 36%	50% vs 50%
Top three requested policies, % of respondents*	1. Reduced energy tax (43%) 2. Higher purchase subsidies (35%) 3. Long-term policy instruments (35%)	1. Simpler application processes for subsidies (38%) 2. Residual value guarantee (31%) 3. Higher purchase subsidies (28%)	1. Driving and rest-time rules (37%) 2. Higher purchase subsidies (26%) 3. Expanded weight allowance (22%)

*Share of the groups respondents that have selected the barrier/policy as one of maximum 3 alternatives
**Willingness to pay

Exhibit 2: Haulier transition groups

Front-runners: already investing and preparing to scale

The first group consists of hauliers that already operate electric trucks and plan to invest in more. Their responses suggest that, where electric trucks fit the operating model, current experience is associated with a continued appetite for investment.

For this group, the main question is no longer whether electrification is possible, but how quickly and efficiently electric operations can be scaled. Their needs are likely to include charging and grid capacity, vehicle availability for further scaling, operational optimisation and commercial factors connected to customer contracts, predictable energy costs, and policy stability.

Conditional adopters: interested, but waiting for better conditions

The second group consists of hauliers that are not rejecting electrification but remain dependent on improved conditions. They may be considering investment within the next few years, be uncertain about timing, or be waiting for stronger economics and improved operational feasibility.

Their concerns typically relate to both commercial and operational factors, with a stronger emphasis on commercial considerations such as high vehicle cost, residual value uncertainty, energy cost uncertainty, and whether customers are willing to pay for fossil-free transport. For this group, the transition is possible, but not yet sufficiently predictable or commercially secure.

Non-ready operators: no credible case under current conditions

The third group consists of hauliers with no current investment plans. These respondents often cite more fundamental barriers. Electric trucks may not yet fit their routes, payload requirements, charging windows, or current customer contracts.

This group should not be interpreted simply as slow-moving or resistant. In many cases, respondents do not yet see a credible business or operational case for transition under current conditions.

Why the segmentation matters

The three-group structure explains why electric truck adoption is visible in the market while broad-scale conversion remains limited. It emphasises that the transition cannot be treated as universal or immediate: different hauliers face different constraints.

- Front-runners need conditions that allow scaling
- Conditional adopters need reduced uncertainty and improved economics
- Non-ready operators need technology, infrastructure, operating conditions, and customer demand to develop further

Accelerating the transition therefore requires differentiated interventions rather than one-size-fits-all messaging.

3. The main barrier is investability

Rather than one single barrier, the survey respondents report a set of linked commercial and operational factors that affect whether electric trucks can become an investable decision, as illustrated in Exhibit 3. If too many of these variables remain uncertain, the business case becomes difficult to calculate, even where there is interest in electrification.

Barrier category % of responses	**Top five barriers by category**	**% of respondents***
1. Commercial (58%)	• High vehicle purchase cost	50
	• Lack of customer willingness to pay	32
	• Uncertain vehicle residual value	13
	• Uncertain electricity or charging costs	13
	• Lack of customer requirements for electric trucks	8
2. Operational (42%)	• Insufficient vehicle range	32
	• Limited charging time on routes	15
	• Lack of public charging	13
	• Limited payload or load capacity	11
	• Lack of vehicle models suitable for our business	8

*Share of respondents that have selected the barrier as one of maximum 3 alternatives, front-runners excluded

Exhibit 3: Commercial and operational barriers to investing in electric trucks

Purchase cost remains the most visible investment barrier

Purchase cost is one of the clearest barriers identified in the survey. Among respondents that do not plan to invest in electric vehicles in the near future, 50% of respondents cite it as a main reason.

This concern is also reflected in requested policy measures. Thirty per cent of respondents ask for higher support levels for purchase subsidies or climate premiums, as well as simpler processes for applying for such support. These responses suggest that purchase-related policy instruments are seen as relevant to accelerating investment.

Free-text responses also point to the perceived size of the cost gap. One respondent states that two diesel trucks can be bought for the price of one electric truck. While this is an individual comment and not a survey-wide quantified comparison, it illustrates how significant the upfront investment difference can feel to hauliers.

Residual value and financing risk add uncertainty

Residual value uncertainty is another factor affecting investment decisions. Thirteen per cent of respondents cite uncertain second-hand value or residual value as a barrier to near-term investment. Others request state credit guarantees or residual value guarantees to reduce financing risk.

This indicates that the investment challenge is not only about the purchase price on day one. It is also about the value of the asset over time and the risk carried by the haulier or financing provider. For smaller operators in particular, this uncertainty may be difficult to absorb.

Electricity and charging costs must be predictable enough to price

Electricity and charging costs are part of the broader investment calculation. Respondents request lower electricity tax and reduced effect charges for heavy transport, and free-text comments also point to concerns about volatility and predictability. Some respondents compare electricity price uncertainty with diesel price predictability, suggesting that operating cost predictability matters even when electricity costs are not selected as the primary barrier.

For hauliers, this is directly connected to customer pricing. To quote electric transport services, they need to understand expected energy costs, effect charges, charging fees, and the operational impact of charging. If these costs are uncertain, the risk of mispricing increases.

Predictable electricity and charging costs are therefore not only an infrastructure issue. They are part of making electric transport commercially priceable.

4. Customers signal ambition, but do not always pay for it

The survey indicates that many hauliers experience customer signals around fossil-free transport, but that these signals vary in strength, as illustrated in Exhibit 4. 28% of respondents report concrete customer requirements, while 72% report vague requirements or no requirements at all. This suggests that sustainability expectations are present in the market but not always translated into clear purchasing criteria.

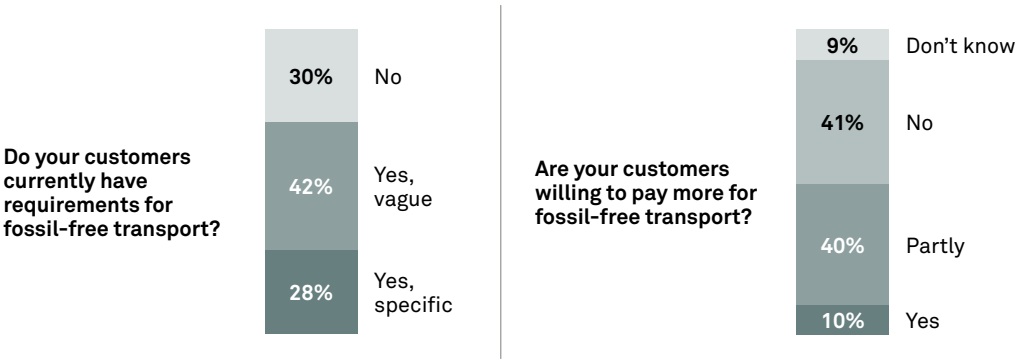


Exhibit 4: Customer requirements and willingness to pay, % of responses

Customer willingness to pay appears more limited. Only 10% of respondents state that customers are willing to pay more for fossil-free transport, while 81% say customers are only partly willing or not willing. This creates a gap between climate ambition and commercial reality, and that gap is also visible in the barriers to investment: among respondents not investing in electric vehicles in the near future, a lack of customer willingness to pay for additional costs is one of the recurring reasons.

This is one of the most important market tensions identified in the survey: **hauliers may be expected to transition, but they cannot carry the full transition cost alone if customers are not willing to pay for fossil-free transport.**

Respondents also point to demand-side policy measures. Some ask for stronger sustainability requirements in public procurement, incentives for private transport buyers to demand electric operation, and reporting requirements on transport buyers' climate impact in the value chain.

Although these measures would not directly reduce the cost of electric trucks, they could help create clearer demand for fossil-free transport and improve hauliers' ability to recover transition-related costs through contracts.

5. Operational fit determines where electrification works today

Electric trucks work when the job fits the truck. The survey shows that electric trucks can be integrated into haulage operations, but also that current technology and infrastructure do not yet fit all use cases. This means that adoption cannot be understood only through attitude or ambition. A haulier may be positive towards electrification but still be unable to make electric trucks work in its current operations.

Range, payload, and model availability remain limiting factors

Range is one of the most visible vehicle-related limitations. Among respondents not investing in the near future, insufficient range for current driving patterns is frequently cited as a reason. Payload and model availability are also cited as constraints. Some respondents refer to limited payload or load capacity, while others cite a lack of models in the right segment or size.

Responses show that electric readiness is not only about battery range, but also about whether vehicles can meet the technical and operational requirements of different transport tasks. Requested policy measures reflect these constraints. Respondents ask for expanded weight allowances to compensate for battery weight, and some point to the need for continued development and pilot projects in areas such as range, cold climate performance, and new vehicle segments.

The survey therefore supports a use-case-based view of vehicle readiness. Electric trucks may work well where route length, payload, charging access, and vehicle availability align, while in other operations, current technology or model availability may still limit adoption.

6. Charging readiness is both an infrastructure and planning challenge

Charging is a central condition for scaling electric trucks, but the survey shows that the transition groups face different charging challenges depending on their electrification maturity. Some are focused on scaling infrastructure already in use, while others are still assessing whether charging can work in their daily operations.

Depot charging is a priority, but hauliers need support to plan and finance it

Depot charging is central for many haulage operations, especially where vehicles return to base on predictable cycles. However, the type of support needed differs by transition stage.

When asked where external guidance on charging infrastructure would be most valuable, front-runners and non-ready operators show contrasting patterns. Front-runners emphasise permit processes and lead times, while non-ready operators focus more on planning the actual charging solution. This suggests that charging needs to evolve with electrification maturity: hauliers already using electric trucks are focused on scaling and optimisation, while non-ready operators are still assessing whether charging can fit their routes, schedules, and vehicle use.

The study also shows demand for support with economic calculations for depot charging and dimensioning chargers and power needs. These responses point to practical investment questions, such as what the charging solution will cost, what power level is needed, how many chargers are required, and whether the existing site conditions are sufficient.

Grid access and connection timelines also appear in the results. Respondents request faster permitting and shorter lead times for grid connection, and free-text comments mention difficulties obtaining sufficient grid capacity or waiting for network operators. A smaller number of respondents also cite insufficient electrical capacity at their facility or depot as a reason for not investing soon.

Route-based charging remains a weak link

Depot charging alone will not be sufficient for all operations. Route-based charging is particularly important for hauliers with longer distances, less predictable routes, or limited opportunities to return to the depot.

The survey shows that route-based charging remains a weak point. Although lack of route-based charging infrastructure is selected by only **13%** of respondents as a direct investment barrier, the broader assessment of charging availability along routes is more critical. Only **19%** of respondents say charging infrastructure along their routes is sufficient, while **47%** say it is insufficient and **14%** say it is missing.

The transition-group breakdown adds nuance. As shown in Exhibit 5, front-runners are more likely to see route-based charging as at least partly workable, while conditional and non-ready operators report greater uncertainty or lack of availability. This suggests that experience with electric trucks may make route charging easier to assess, but also that the current infrastructure is not yet perceived as reliable enough for broader adoption.

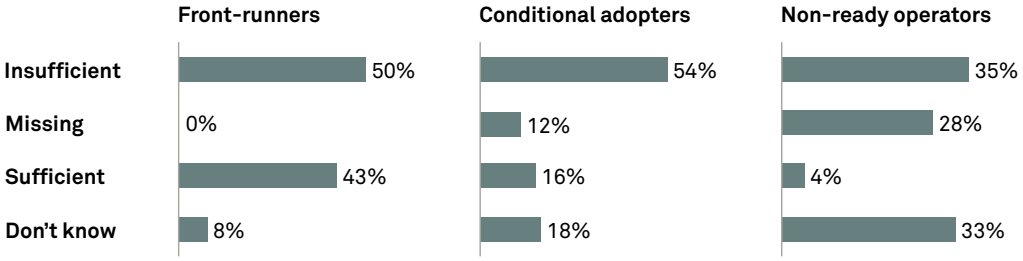


Exhibit 5: Perceived charging availability along routes by transition group, % of responses

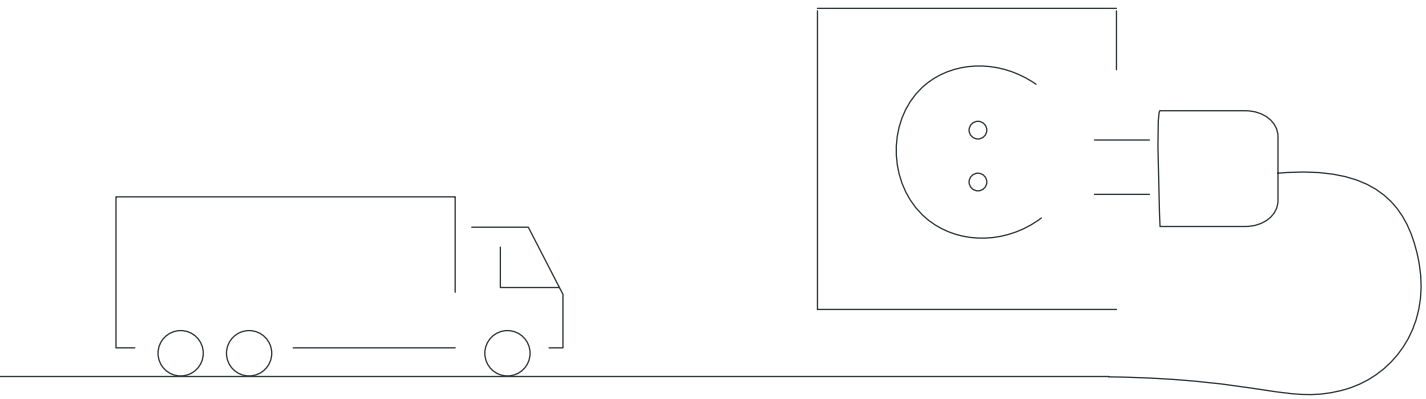
For non-ready operators, the high share of 'don't know' responses are particularly important, because it suggests limited exposure to charging solutions, uncertainty about whether route charging can fit their operations, or that charging is not yet seen as relevant enough to assess in detail.

Overall, route-based charging appears to be a scaling bottleneck. Depot charging may enable many predictable use cases, but broader adoption will require charging along routes that hauliers see as available, reliable, and compatible with freight operations.

Charging must fit into daily transport planning

The study also indicates that charging is not only an infrastructure issue, but a planning issue. Respondents point to a need to understand how charging affects vehicle use, routes, delivery windows, driver schedules, depot dwell time, and future fleet planning. For operators still considering electrification, this planning step appears important before they can judge whether electric trucks are operationally realistic.

Some respondents cite too little time for charging stops as a barrier to investment, and the requested policy measures reinforce this point. Respondents ask for adapted driving and rest-time rules that take charging into account, as well as rules allowing trucks to move to and from charging stations during driver rest periods. This suggests that some hauliers see a mismatch between current regulatory frameworks and the practical planning needs of electric truck operations.



7. Policy needs to make the transition predictable, targeted, and investable

The survey indicates that most respondents do not view current political support as sufficient for the transition to electric trucks. Only 8% of respondents say current support is sufficient, while 72% say it is partly sufficient or completely insufficient. The perceived policy gap spans several parts of the investment decision, as shown in Exhibit 6.

Policy category % of responses	**Requested policy changes***	**% of responses**
1. Financial support and financing risk (36%)	• Higher levels of purchase subsidies or climate premiums that reduce the purchase cost	12
	• Simplified application process for purchase subsidies or climate premiums that reduce the purchase cost	11
	• Government credit guarantee and residual value guarantee to reduce financing risk	9
	• Reduced vehicle tax for electric vehicles	5
2. Regulations and operational conditions (21%)	• Adapted driving and rest time rules to account for charging times	10
	• Increased weight allowance to compensate for the weight of batteries	6
	• Adapted rules to allow trucks to be moved to/from charging stations during the driver's rest period	5
3. Energy costs and charging infrastructure (18%)	• Reduced electricity tax and lower power demand charges for heavy transport	8
	• Investment support for charging infrastructure at own depot	5
	• Faster permitting processes and shorter lead times for grid connection	3
4. Policy instruments for fossil fuel transition (16%)	• Long-term, predictable policy instruments with a 5–10-year horizon	8
	• Road user charges differentiated by fuel type	3
	• Increased taxation of fossil fuels	3
5. Demand and market incentives (9%)	• Strengthened sustainability requirements for transport in public procurement	4
	• Incentives for private transport buyers to request electric transport	3

*Policy changes with too few votes has been excluded in the visualisation. Respondents could select a maximum of three alternatives.

Exhibit 6: Requested policy changes

The exhibit shows that hauliers primarily ask for policy measures that reduce investment risk and improve operating conditions. Financial support and financing risk form the largest category, with respondents highlighting purchase subsidies, simplified application processes, and residual value guarantees. Operational regulation is the second-largest area, especially rules that account for charging time, vehicle weight, and movements around charging. Energy costs, charging infrastructure, and long-term policy predictability are also central, while demand-side measures receive fewer responses but remain relevant for strengthening the commercial case. Overall, the message is that policy must reduce both upfront costs and long-term uncertainty.

If all respondents were to be treated as a homogenous group, the top three policy requests would be:

1. Higher levels of purchase subsidies or climate premiums that reduce vehicle purchase cost

2. Simpler application processes for purchase subsidies or climate premiums that reduce vehicle purchase cost

3. Adapted driving and rest time rules to account for charging times

While these three policy changes would be positive for hauliers as a collective, policy also needs to reflect that the market is not moving as one group.

For **front-runners**, the priority is to make scaling easier. These hauliers already operate electric trucks and plan further investment. Their needs are less about proving that electrification can work and more about optimising the commercial case and removing bottlenecks: lower electricity tax and power charges, faster grid connection, higher and more predictable subsidies. **For this group, the role of policy is to remove friction so existing momentum can translate into larger fleets.**

For **conditional adopters**, the task is to reduce uncertainty. These hauliers are interested, or at least open to investment, but do not yet see a sufficiently secure business case. Purchase support, simpler support processes, residual value or credit guarantees, lower electricity cost, and stronger customer demand can help turn interest into investment. **For this group, policy needs to make the decision bankable.**

For **non-ready operators**, the policy challenge is to build confidence that electrification can become relevant for their operations. Their responses point to more fundamental barriers around operational fit, charging access, vehicle availability, and customer demand. The requested policies point towards operational factors: adapted driver and rest time rules and weight restrictions, together with policies that reduce investment risk. **For this group, policy needs to lower the threshold for future adoption while recognising that electrification is not yet viable in all operations.**

Implications for the next phase of electric trucks in Sweden

The first phase of electric truck adoption has shown that electrification is possible in parts of Swedish haulage. The next phase is harder: it requires moving from successful early use cases to broader commercial scaling.

The survey highlights five priorities:

1. Make the business case more investable

Electric truck adoption will scale only if more hauliers can calculate a credible business case. That requires action on purchase cost, financing risk, residual values, and electricity costs.

2. Match support to different transition groups

Front-runners, conditional adopters, and non-ready operators need different forms of support. A single policy or communication approach may not address the full market.

3. Strengthen customer-side demand

Customer requirements need to become clearer and more commercially meaningful. If transport buyers want fossil-free transport, procurement practices must reflect the cost and value of that transition.

4. Treat charging as an operational system

Charging infrastructure must be planned around real freight operations. Depot charging, public charging, grid capacity, route planning, delivery windows, and driver regulations all interact.

5. Create predictable long-term conditions

Hauliers need confidence that support schemes, electricity cost structures, infrastructure development, and policy direction will remain stable enough to justify long-term investment.

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