INVERS

INVERS Mobility Barometer Vol. 5

European Car Sharing 2025

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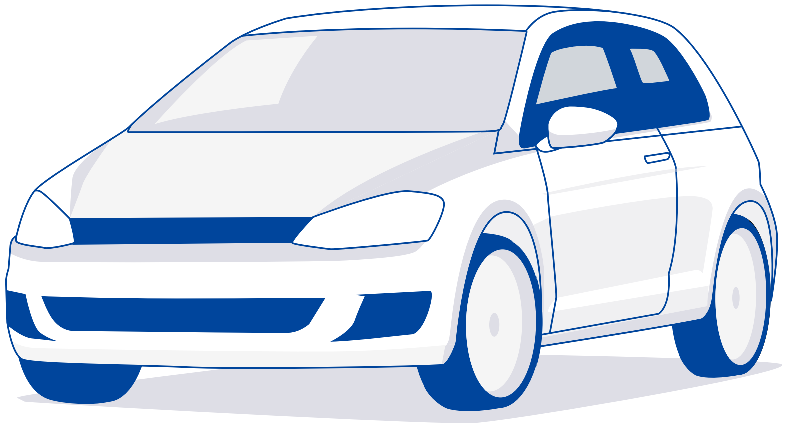


At a glance

Key numbers for the station-based (SB), free-floating (FF) and peer-to-peer (P2P) markets*

42
European countries with car sharing fleets (FF, SB, P2P)

129k+
Fleet size in SB and FF car sharing combined (+8% YOY)

Station-based	Free-floating	Peer-to-peer
470+ Operators	**80** Operators	**40+** Operators
62k+ Fleet size	**67k+** Fleet size	Fleet size not quantified

***Note:** Statistics excluding the transcontinental markets of Turkey and Russia.

1

Intro

Getting started with definitions and scope

Introducing the INVERS Mobility Barometer

To support industry expertise and market insights, the **INVERS Mobility Barometer series** curates research findings and expert knowledge from related sectors.

We're excited to present the 2025 edition of our European Car Sharing Barometer, which highlights the latest trends and developments in the market. Previous reports you may be interested in include: North American Car Sharing Market, Large Vehicle Sharing, Car Sharing in East and South East Asia as well as Microcars in European Car Sharing.

This publication compiles publicly available information and does not include "insider" knowledge from customers or other stakeholders.

Purpose and method

How this study can help

Purpose:

The Barometer aims to provide a quick and comprehensive overview of pivotal market dynamics, insights, and trends. This report is designed to cater not only to stakeholders in the car sharing industry but also to a broader audience interested in mobility solutions.

Method:

This publication leverages existing industry knowledge and enriches it with fresh insights gained through in-depth industry interviews and analysis of the current market landscape. It focuses on the station-based, free-floating, and peer-to-peer business models for which it provides an overview based on publicly available, but previously disaggregated data. Other models, such as corporate car sharing and automated rental, are not the focus of this report. The barometer looks at all European markets except Turkey and Russia as they also reach into the Asian market.

Highlighting the three key business models of this Barometer

...and other business model examples

Station-based / round-trip car sharing

Station-based car sharing requires users to return the rented vehicle to one of the operator's locations or zones, usually the same one where they started their rental. This model overlaps with community or condominium car sharing.

Operator examples:
- cambio (GER, BEL)
- Greenwheels (NED)
- Mobility (CH)

Free-floating car sharing

Short- to medium-term car rental service in which customers rent vehicles on demand and return them to any location within a defined geographic area.

Operator examples:
- Free2move (GER, ITA, more)
- GreenMobility (DEN)
- MILES (GER)

Peer-to-peer car sharing (P2P)

In P2P car sharing, the vehicles are not owned by the operator, but by individuals or other companies. The P2P operator acts as an agent in between users and vehicle owners/providers.

Operator examples:
- Getaround (across Europe)
- Snappcar (NED, GER)
- Turo (UK, FRA, beyond Europe)

Other

On page 43, we explore additional car sharing models that either go beyond the three main models or partially overlap with them.

Examples:
- Automated rental
- Corporate car sharing
- Teledriving car sharing

Blurring the boundaries

An increasing number of car sharing operators apply multiple business models

Car sharing models that used to be separate have started to merge. The distinction between free-floating, station-based, peer-to-peer, and even car subscription or automated rental services has started to fade in recent years. Many operators now combine these blurred approaches and grey zones in their offerings.

Here are some noteworthy industry examples:

- In Germany, some formerly station-based-only providers have embraced “combined systems” (see bcs 2025).
- Bolt Drive, a ride-hailing and kickscooter sharing provider, has gained traction in selected national car sharing markets.
- SIXT Share strategically leverages synergies with its classic rental business.

2

European market overview

Station-based, free-floating, and peer-to-peer car sharing

Europe boasts the most varied and dynamic car sharing ecosystem

Many strong brand examples from hundreds of operators across Europe

129,000 vehicles in station-based and free-floating car sharing alone

A growth of +8% compared to our 2024 data

Across Europe, we identified more than 129,000 shared vehicles in station-based and free-floating car sharing services. Of these, 67,000 operate in free-floating systems, while another 62,000 belong to station-based fleets. Additional vehicles are active in peer-to-peer and corporate car sharing models.
In our previous INVERS Mobility Barometer on "European Car Sharing 2024", we counted around 120,000 vehicles across both main models.
The 129,000 vehicles recorded in this year's analysis reflect an estimated 8% growth in the European car sharing market.

129,000 shared cars

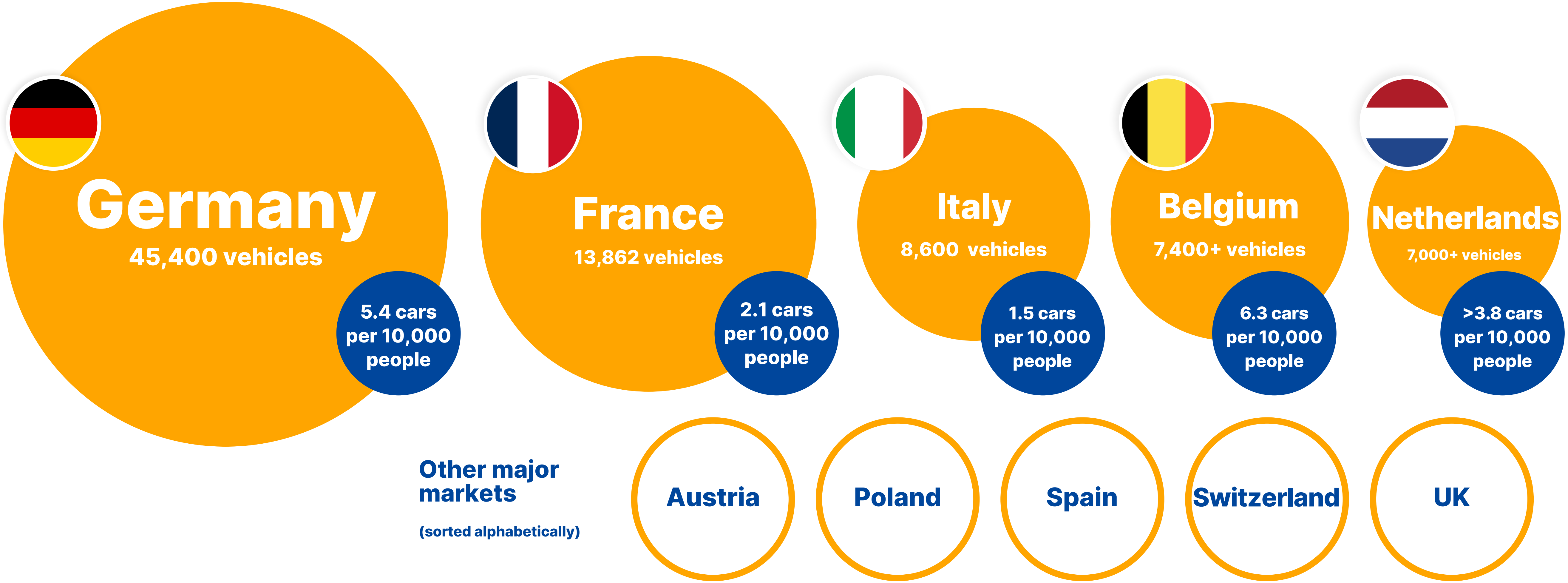
67,000 free-floating cars

62,000 station-based cars

Note: 2024 data from INVERS Mobility Barometer on European Car Sharing 2024 (INVERS 2024).
Fleet size excluding the transcontinental markets of Turkey and Russia.

Top 5 European car sharing markets

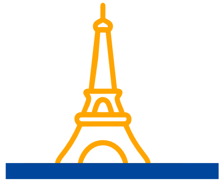
Free-floating and station-based car sharing combined



Sources: Desktop study + Germany (bcs 2025), France (AAA 2025), Italy (2024 value by Osservatorio Nazionale Sharing Mobility 2025), Belgium (Way To Go 2025), Netherlands (own estimate from 2025). Overlaps with other car sharing business models might be possible, as stated sources might use varying methods to combine their national values. Market overview excluding the transcontinental markets of Turkey and Russia.

Regional breakdown

Western Europe is still the largest European car sharing region



Western Europe

Western Europe leads the continent in car sharing, with every country in the region boasting a thriving market.

Characteristics:
- Leading European car sharing region.
- Germany and France have the highest combined station-based and free-floating fleet sizes.
- Belgium and Germany have high per-capita rates of available cars.

Southern Europe

Southern Europe presents a mixed market. It includes strong car sharing cultures like in Italy, Spain and Slovenia, alongside emerging car sharing markets such as Portugal, Greece, and Croatia.

Characteristics:
- Italy is a top 3 European car sharing market.
- Spain has a thriving free-floating market.

Eastern Europe

Eastern Europe is a dynamic car sharing region with numerous operators, including well-known names like Bolt Drive, Car4Way, Citybee,MOL Limo, Spark, Traficar, and Wigo.

Characteristics:
- Free-floating models dominate.
- Strong markets in Poland, the Czech Republic, the Baltics or Hungary.
- The Baltics have a very high per-capita rate of car sharing vehicles.

Northern Europe

Northern Europe features a large number of operators, with car sharing widely used across Denmark, Sweden, Norway, Finland, and Iceland.

Characteristics:
- Station-based services are prevalent.
- Some cities like Copenhagen, Aarhus, and Helsinki have strong free-floating markets.
- Norway has a high per-capita fleet availability.

Western Europe

Europe‘s leading car sharing region

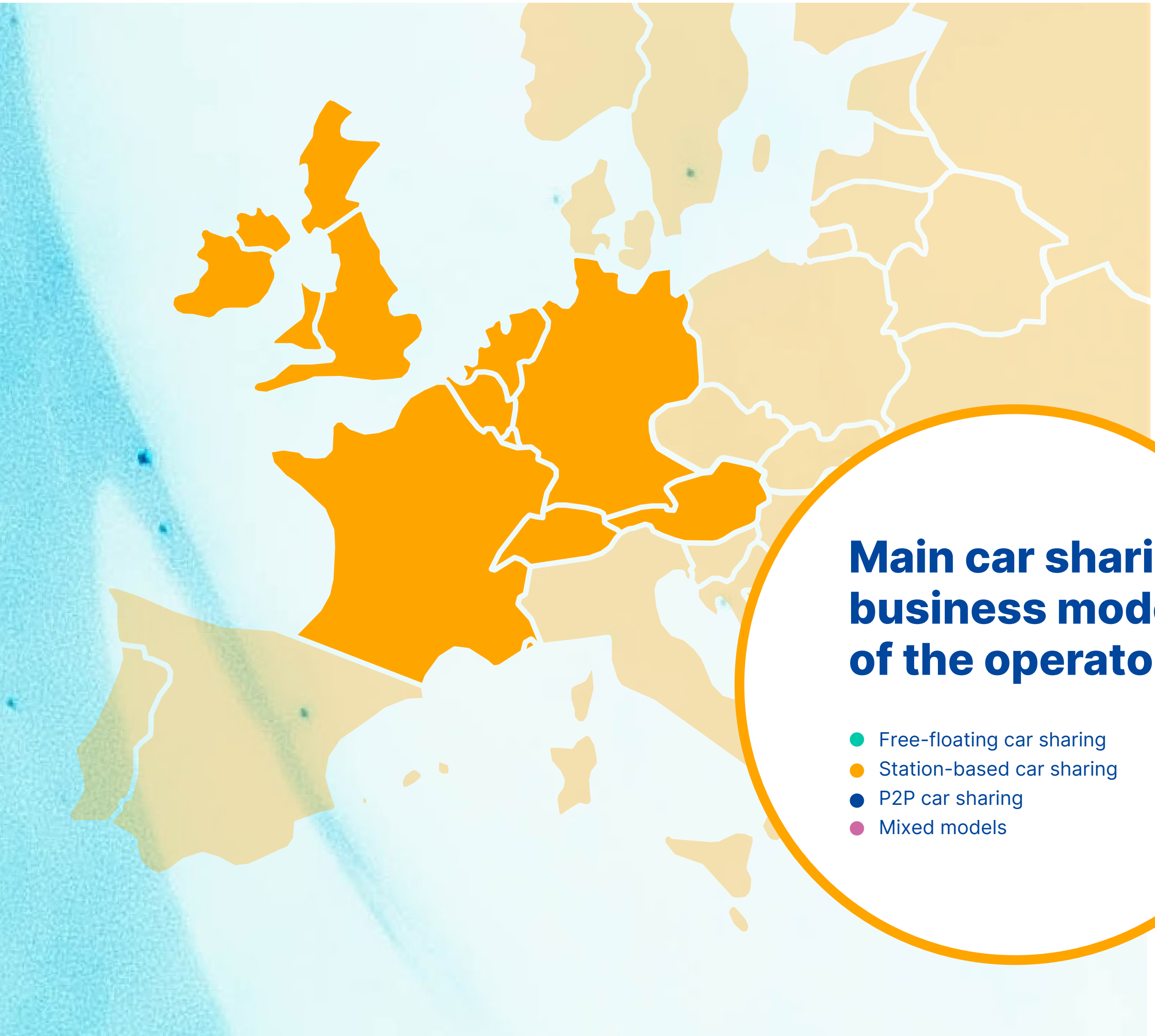
Western Europe leads the continent in car sharing, encompassing key markets such as Germany, France, Belgium, the Netherlands, Switzerland, Austria, the United Kingdom, and Ireland. Western Europe has been a pioneer in global car sharing development and significantly shaped the European car sharing landscape.

In contrast to other regions, one single model does not dominate; instead, car sharing is offered in large numbers across all models. In addition, this region is home to the largest free-floating, station-based and peer-to-peer operators.

Germany is the powerhouse of European car sharing. 4 out of 5 of the strongest European car sharing markets (see page 12) are based in Western Europe. Berlin, Paris, London, Amsterdam, Brussels and many other cities have thriving car sharing cultures.

Western Europe

Selected national car sharing operator and platform examples



Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Andorra

- izi Carsharing

Austria

- Avant2go
- caruso
- DRIVAR
- Getaround
- GoMore
- Family of Power
- Free2move
- ÖBB Rail&Drive
- sharetoo/WienMobil Auto
- tim Österreich

Belgium

- BattMobility
- Cozywheels
- Dégage
- Getaround
- cambio
- Mobilize Share
- Poppy
- Wibee

France

- citiz
- Clem
- Communauto
- E+Share Drivalia
- Free2move
- Getaround
- Hertz 24/7
- marguerite
- Mobilize Share
- modulauto
- LEO&go
- Optymo
- Turo
- Yea!
- Yélomobile

Germany

- Bolt Drive
- book-n-drive
- cambio
- Campanda
- deer
- Flinkster
- Free2move
- Getaround
- Hertz 24/7
- MILES
- PaulCamper
- scouter
- Snappcar
- SIXT Share
- stadtmobil
- Stattauto München
- teilAuto
- YesCapa

Ireland

- Driveyou
- Enterprise Car Club
- GoCar
- Goboony
- Hertz 24/7
- YesCapa
- YUKŌ

Liechten-stein

- Sponti-Car
- Share Birrer

Luxembourg

- Carloh
- Flex

Monaco

- Mobee

Netherlands

- CHECK
- Free2move
- Goboony
- Greenwheels
- MyWheels
- OnzeAuto
- PaulCamper
- SIXT Share
- Snappcar

Switzerland

- 2EM
- drivemycar
- edrive carsharing
- GoMore
- Mobility
- MyCamper
- Quickrent
- Share Birrer
- Sponti-Car
- Swiss E-Car
- YesCapa

UK

- camplify
- Co Wheels
- Enterprise Car Club
- EVie
- Goboony
- Hertz 24/7
- Hiyacar
- Turo
- Zipcar

Eastern Europe

A hub for free-floating car sharing

In most car sharing cities in Eastern Europe, free-floating and to a lesser extent peer-to-peer car sharing are the dominant business models. In the Czech Republic, we can also find a vibrant station-based scene.

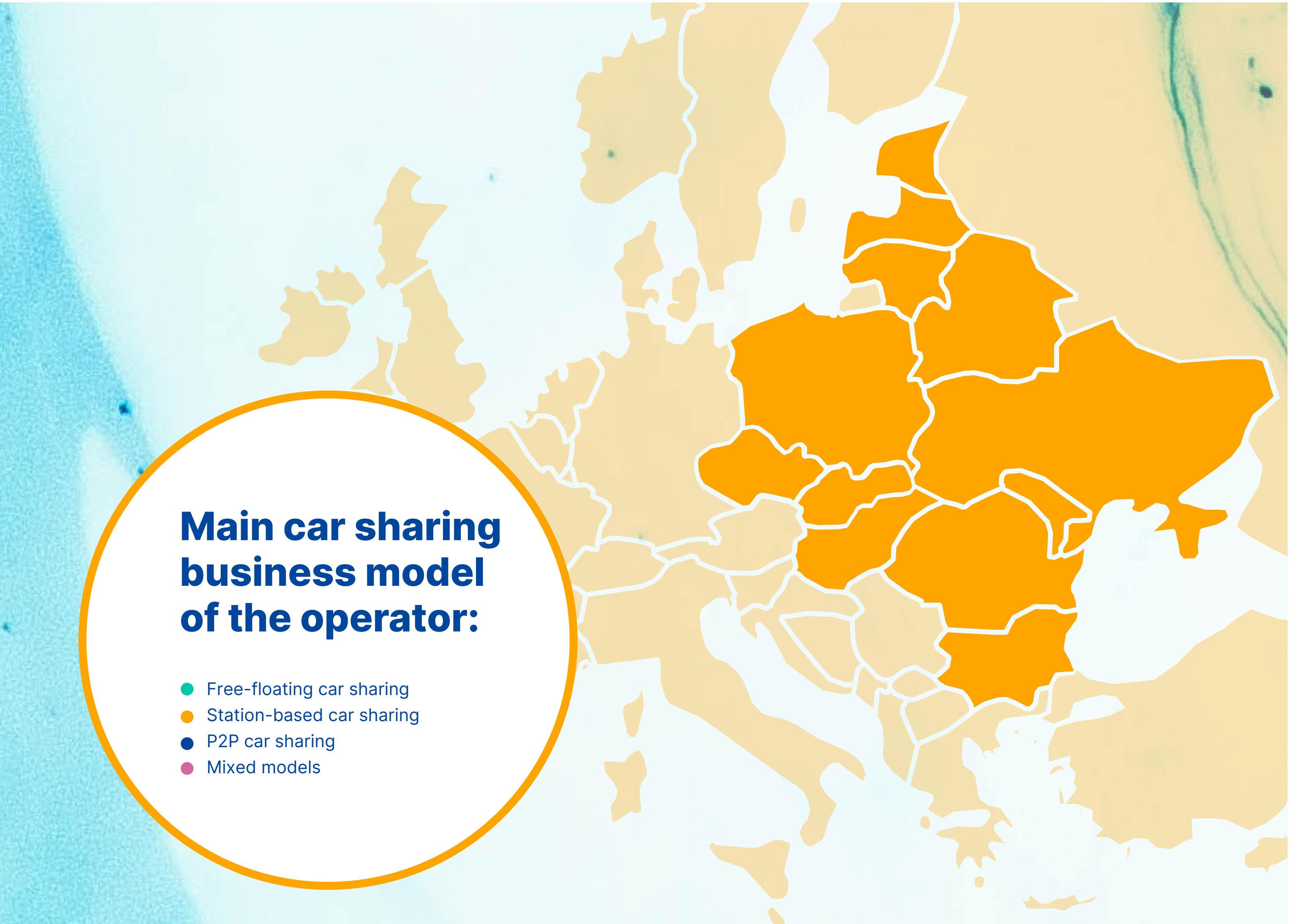
Poland is the largest car sharing market in Eastern Europe and home to a key free-floating market. Although not in focus of this report, Russia has a huge car sharing market, with a strong focus on free-floating car sharing as well.

European city states aside, we're estimating that the Baltic countries have the highest European per capita car sharing availability in our report sample (free-floating and station-based combined). A recent development was the merger of CarGuru and OXDrive in mid-2024. More recently, Bolt integrated many external car sharing operators into their app.

Panek in Poland, and Fiqsy in Latvia are examples that opted to end their car sharing offer.

Eastern Europe

Selected national car sharing operator and platform examples



Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Belarus

- Anytime
- Hello
- Multimotors

Bulgaria

- GOeGO
- Spark

Czech Republic

- 123-Transporter
- Anytime
- Autonapul
- Hertz 24/7
- Bolt Drive
- Car4Way
- Šárka

Estonia

- Bolt Drive
- Citybee
- Forus Autolevi
- GoMore

Hungary

- 123-Transporter
- GreenGo
- MOL Limo
- Wigo

Latvia

- Bolt Drive
- CarGuru
- Citybee

Lithuania

- Bolt Drive
- Citybee
- Spark
- TryMyCar
- Woop Drive

Moldova

- amiGO
- Getmancar

Poland

- 4Mobility
- Beep.rent
- Traficar

Romania

- Hip.car
- Perpetoo

Slovakia

- 123-Transporter
- Share Car

Ukraine

- Getmancar

Southern Europe

Italy and Spain have the largest local fleets

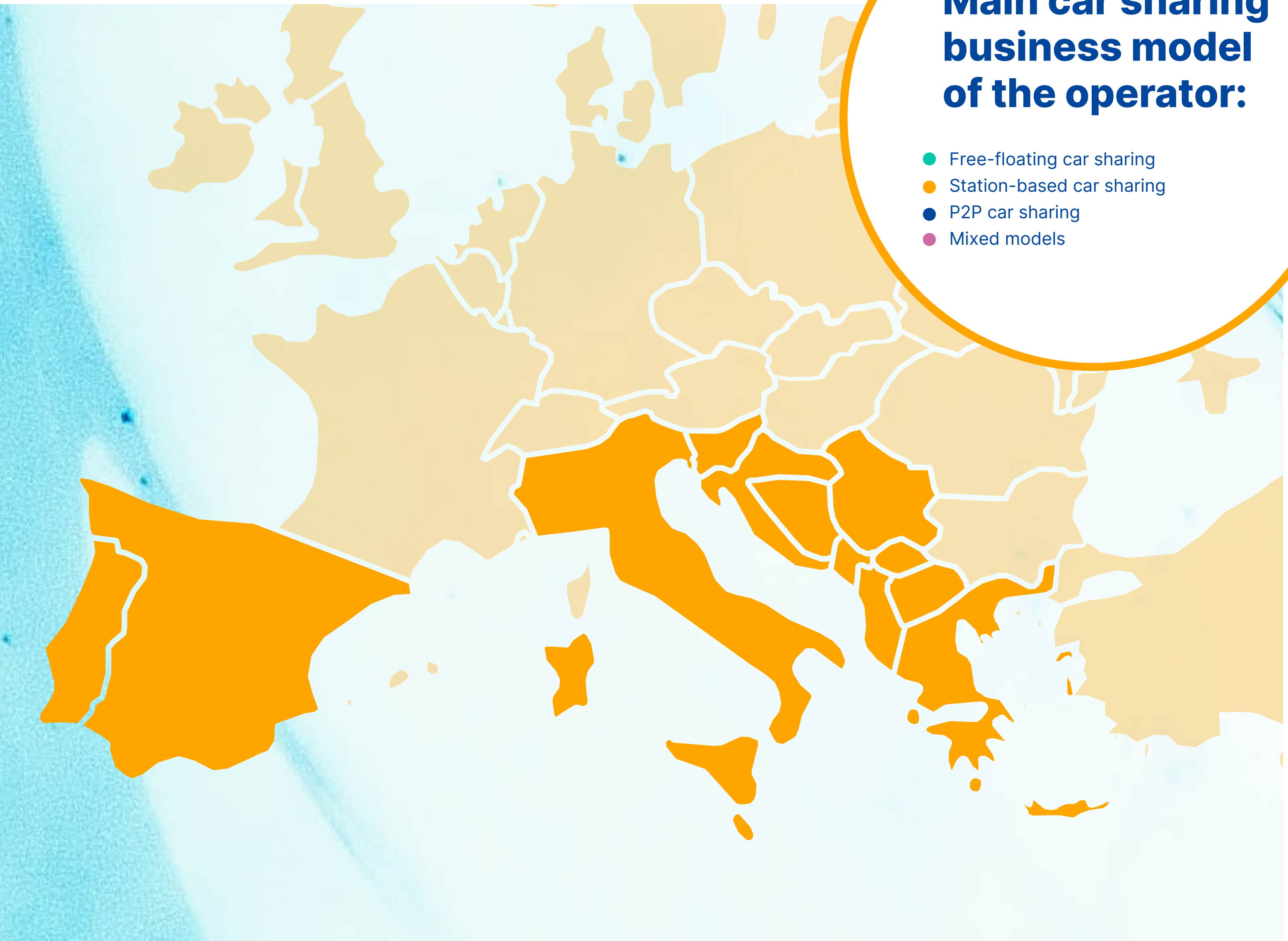
The main markets in Southern Europe in terms of fleet size are Italy and Spain. In both countries, the free-floating car sharing fleet significantly outnumbers the station-based fleet, and both have well-developed peer-to-peer markets. Italy is currently the second largest free-floating car sharing market in Europe, while Spain ranks fifth.

Other local car sharing markets include Portugal, Slovenia, Croatia, Serbia, North Macedonia, Cyprus and Greece. Cyprus has a high level of car sharing cars per capita. Although not the focus of this report, Turkey has a well-developed car sharing market with players such as TikTak and Rentiva.

Important developments include the continuing re-emergence of the Italian car sharing market, the acquisition of GoTo’s Spanish car sharing fleet by guppy, and the start of Avant2Go in North Macedonia.

Southern Europe

Selected national car sharing operators and platform examples



Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Albania

- Rentout

Bosnia and Herzegovina

- e-GO Pure Motion

Croatia

- Avant2Go
- Campanda

Cyprus

- RideNow

Greece

- AstyMove
- Campanda
- Caroo
- Goboony

Italy

- Amicar
- Auting
- Campanda
- Carsharing Roma
- Corrente
- E+Share Drivalia
- Elettra
- Enjoy
- Evai
- Free2move
- Goboony
- Hertz 24/7
- Playcar
- Pikyrent
- Yescapa
- Zity

Kosovo

- Rentout

Montenegro

- Rentout

North Macedonia

- Avant2Go
- Rentout

Portugal

- Bookycar
- Campanda
- Hertz 24/7
- Yescapa

Slovenia

- Avant2Go
- Campanda
- GreenGo
- Share'Ngo

Spain

- Amovens by GoMore
- Campanda
- camplify
- Free2move
- Getaround
- guppy
- Ibilkari
- MEC Carsharing
- Som Mobilitat
- Voltio
- Wible
- Yescapa
- Zity

Serbia

- Anygo

Northern Europe

A traditional car sharing market with a focus on station-based and peer-to-peer

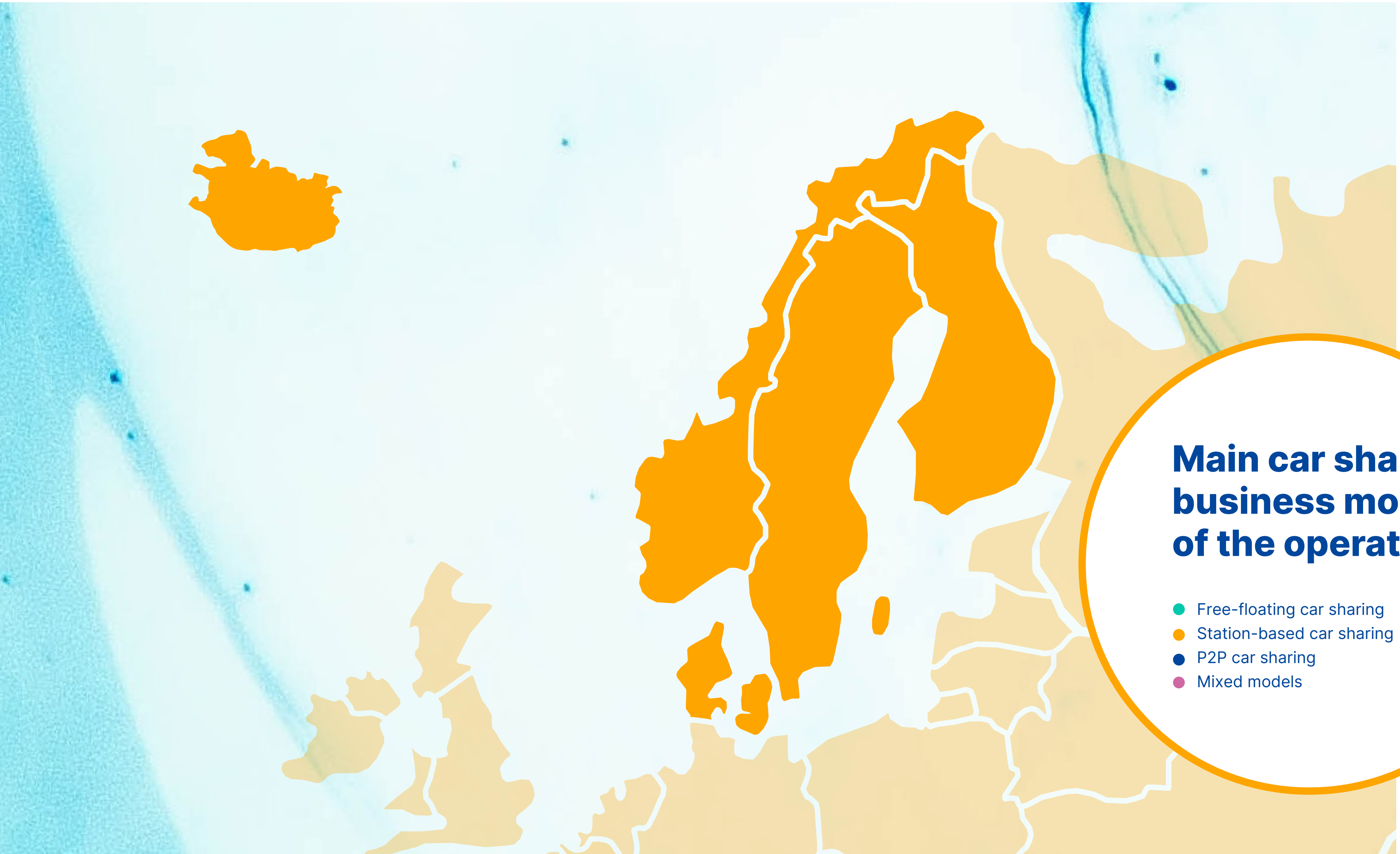
In most Northern European countries, station-based services dominate, enriched by major peer-to-peer car sharing services.

Major exceptions are Denmark, Finland, and Iceland, where significant free-floating car sharing scenes exist around operators like GreenMobility (Denmark) and Hopp (Iceland). In Norway and Sweden, station-based or peer-to-peer car sharing dominate. Finland is a mixed market.

The Nordics have a couple of strong national brands. Some of them operate even across multiple markets, e.g. Hyre (pictured on the right), Kinto Share and GoMore.

Northern Europe

Selected national car sharing operators and platform examples



Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Denmark

- GoMore
- GreenMobility
- Hyre
- KINTO Share
- Tadaa!

Finland

- 24Go
- 24Rent
- Aimo Share
- GoMore
- Japster
- MyCamper
- Omago

Iceland

- Caritas
- Carrenters
- Hopp

Norway

- Bilkollektivet
- Campr
- Dele
- Getaround
- Hertz Bildeling
- Hyre
- MyCamper

Sweden

- Bilpoolen
- GoMore
- Hyre
- Kinto Share
- MyCamper
- Lynk & Co.
- OKQ8 Bilpool
- OurGreenCar
- rulla

Where should you look to learn about dense systems?

Four top regions with large per capita car sharing availabilities nationwide (FF and SB combined)

Belgium

Belgium stands out with a combined station-based and free-floating per capita car sharing availability of 6.3 vehicles per 10,000 inhabitants. Both business models are roughly of equal fleet size. Belgium has the highest combined station-based/free-floating car sharing density among the top 5 car sharing markets in our report.

Learn more about the Belgian market on page 49.

Germany

In absolute fleet size, Germany is Europe's leading market. However, it not only has the largest national fleet but offers 5.4 shared free-floating and station-based cars per 10,000 inhabitants. The free-floating market is larger than the station-based market.

Learn more about the German market on page 46.

Baltic states

The Baltic states are an inspiring example when it comes to car sharing density and availability. City states aside, we're estimating that the region has the highest European per capita car sharing availability in our report sample (free-floating and station-based combined). The key business model in the region is free-floating car sharing.

Explore our interview with Bolt Drive on page 59.

Switzerland

Switzerland is a great example of high per-capita car sharing rates. It's not only a European Top 5 station-based car sharing market in absolute numbers but it also stands out with its 4.4 station-based cars per 10,000 inhabitants. Switzerland does not have a free-floating service.

Learn more about the Swiss market on page 53.

High fleet electrification rates in selected key markets

Share of electrification is much higher in car sharing than in private fleets

The ongoing electrification of car sharing fleets reflects a push by operators to increase the prevalence of electric vehicles (EVs) and hybrid electric vehicles. The examples below show selected key car sharing markets and their stated electrification details as reported in national car sharing reports. Please note that national report methods vary and refer to different sets of car sharing business models.

Car sharing plays a key role in driving overall national EV adoption. External national car sharing reports consistently show that in major markets, station-based, free-floating or combined car sharing fleets often have significantly higher electrification rates than private vehicles. In 2024 (previous report), around 50% of European station-based and free-floating operators offered at least one electric vehicle in their fleet.

30% EVs + 16% hybrid

(public car sharing)

50% EVs/hybrids combined

(multiple car sharing modes)

35% EVs + 38% hybrid

(free-floating + station-based)

66% EVs + 19% hybrid

(free-floating + station-based)

Sources: Italy (Osservatorio Nazionale Sharing Mobility 2025), Spain (AVCE 2025), UK (CoMoUK 2025), Netherlands (CROW 2025). Methods by quoted sources may vary.

Typical vehicle brands and models

A selection of common cars out of over 55 brands and 360 models in station-based and free-floating car sharing*


Renault Kangoo


Ford Transit


Peugeot 208


Fiat 500


Renault Clio


Seat Arona

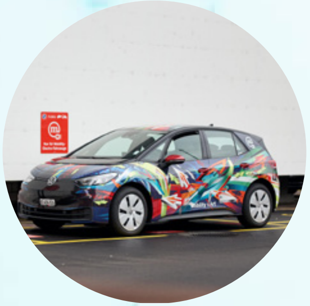

Opel Astra


VW Golf


Audi A3


Toyota Yaris


Tesla Model 3


VW ID. 3


Opel Corsa


Renault Zoe


Audi Q2

***Note:** This analysis has been conducted for our previous INVERS Mobility Barometer on European Car Sharing 2024.

Examples of large vehicles in car sharing

A snapshot from campers and transporters

Nissan NV200

Opel Movano

VW Crafter

Renault Kangoo

Mercedes Vito

VW T6

VW Caddy

Renault Master

Ford Transit Custom

Opel Vivaro

VW T6 Campervan

Peugeot Boxer

Ford Transit Camper

Fiat Talento

2.1

Station-based car sharing

European market overview

Over 62k cars in use by at least 470 operators

The oldest car sharing model remains a key driver in the industry

Station-based (SB) car sharing requires users to return the rented vehicle to one of the operator's designated locations or zones, usually the same one where they started their rental. This model overlaps with community or condominium car sharing and is often referred to as round-trip car sharing.

Since its implementation in the 1980s, station-based car sharing has steadily gained traction, serving as a key driver for the car sharing industry.

The European market is growing and has over 62,000 station-based car sharing vehicles operated by at least 470 operators across 25 countries.* One year ago, we identified 57,000 vehicles for the business model. Noteworthy, a significant number of operators are small-sized and community-centered. Station-based services can be found not only in major cities, but also "in smaller cities and towns, as smaller user bases are enough for smaller fleets concentrated at selected locations" (Friedel 2021).

62k+ vehicles

Estimated SB fleet size (data as of Q2/Q3 2025)*

470

Estimated number of SB operators (data as of Q2/Q3 2025)*

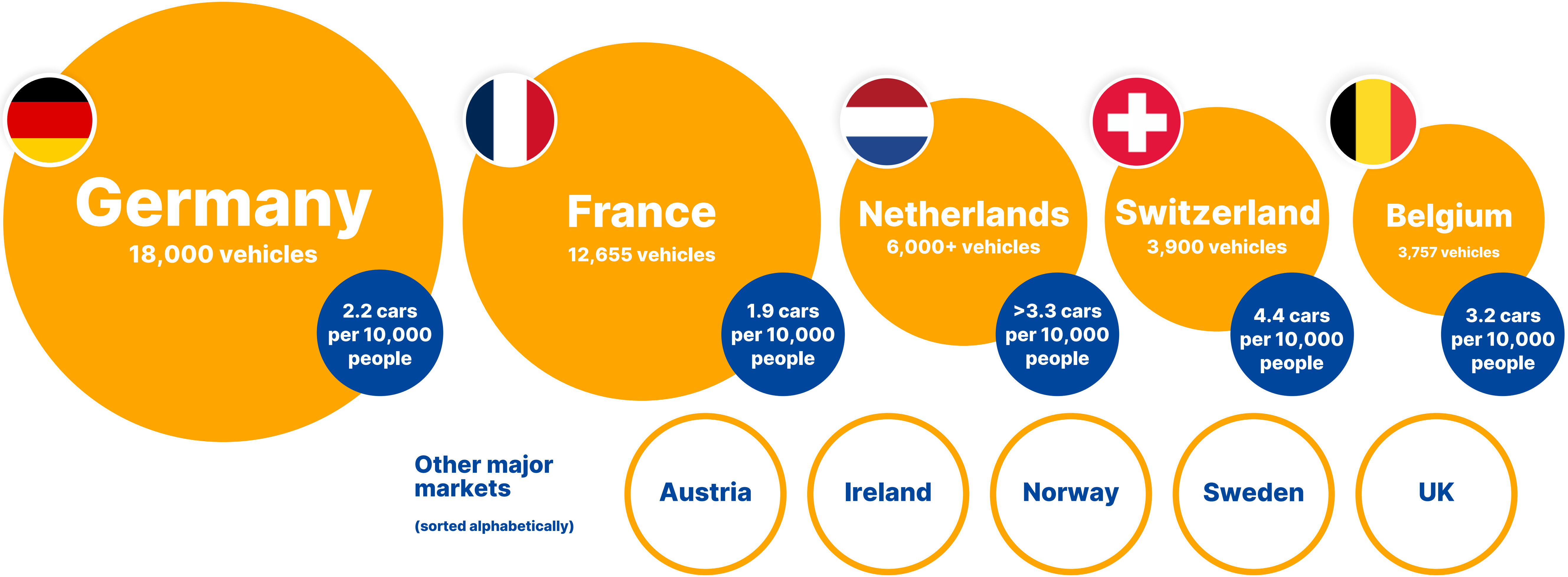
25

Countries with SB operators (data as of Q2/Q3 2025)*

***Info:** The 62,000+ European station-based car sharing cars are an estimate based on publicly available national and individual fleet size statistics and desktop research. Russia and Turkey not included in above data.

Key European station-based car sharing markets

Germany is Europe's largest market, followed by France and the Netherlands



Sources: Desktop study + Germany (bcs 2025, includes some hybrid models), France (AAA 2025), Netherlands (own estimate from 2025), Belgium (Way To Go 2025), Switzerland (CHACOMO 2025). Overlaps with other car sharing business models might be possible, as stated sources might use varying methods to combine their national values. Market overview excluding the transcontinental markets of Turkey and Russia.

Examples of station-based operators (1/3)

Insights into selected operators

	cambio	stadtmobil carsharing	mobility	MOBILIZE BEYOND AUTOMOTIVE | share
	With over 230,000 customers and a fleet of several thousand vehicles in 46 German and more than 130 Belgian cities, cambio is one of the largest station-based car sharing providers.	As one of Germany‘s largest station-based car sharing operators, Stadtmobil boasts a robust network of stations in regions such as Rhine-Ruhr, Rhine-Main, Berlin, Stuttgart, Hanover, and Karlsruhe.	Founded in 1997 through the merger of the ATG Auto Teilet and ShareCom cooperatives, Mobility is now one of Europe‘s largest station-based car sharing networks. It serves approximately 300,000 customers with a fleet of around 3,000 vehicles across more than 1,600 stations.	Mobilize Share operates a station-based car sharing service, while its free-floating car sharing sister brand is called Zity. The two brands are increasingly growing together, as evidenced by their new joint app, ‚Zity & Mobilize Share‘. A noteworthy development is the Mobilize Duo Pro from Renault, which is aimed at fleet and car sharing users.
USP	Early pioneer in the market with a focus on north-west Germany and Belgium	Focus on Western Germany, some free-floating services	Organized as co-op. Dense station network across the country	OEM-backed (Renault), French focus
Vehicles used	Opel Corsa, Ford Focus, Citroën Berlingo, Citroën Jumper, VW ID.3, and more	Opel Corsa, Dacia Sandero, Renault Kangoo, VW Golf, Renault Trafic, and more	Citroën C1, Toyota Yaris, Renault Clio, VW ID3, Renault Zoe, Skoda Octavia, Mercedes Vito, and more	Renault Zoe, Renault Master, Renault Trafic, Dacia Spring, and more
Notable cities	Aachen, Antwerp, Berlin, Bremen, Brussels, Düsseldorf, Ghent, Hamburg, Köln	Berlin, Hannover, Karlsruhe, Stuttgart, Trier	Basel, Bern, Genf, Lausanne, Luzern, Zürich	Bordeaux, Lyon, Marseille, Montpellier, Nantes, Paris

Examples of station-based operators (2/3)

Insights into selected operators

	citiz	zipcar	Enterprise CarClub	KINTO SHARE
	Founded in 2002 as France-Autopartage, Citiz has grown into one of the largest car sharing networks in France, comprising many local stakeholders. The network operates in over 250 cities with a fleet of nearly 2,700 shared cars.	With 25 years of industry experience, Zipcar is a leading car sharing operator, boasting a global fleet of over 12,000 vehicles. In the UK, Zipcar has over 650,000 members with access to thousands of cars and vans.	Enterprise Car Club offers back-to-base car sharing services across the UK and Ireland through a fleet of more than 1,300 vehicles. Backed by Enterprise Mobility, it benefits from support from and integration with the Enterprise Rent-A-Car branch network, which offers additional car rental services.	Kinto Share, a service from Toyota, operates in countries such as Sweden or Denmark. The product offerings vary by country. Other markets rather focus on corporate car sharing.
USP	Focus on France, dense network	Combination of strong station-based network and free-floating	Available in UK and Ireland in a large amount of towns and cities	OEM-backed (Toyota)
Vehicles used	Renault Twingo, Fiat Panda, Toyota Aygo, Toyota Yaris, Renault Clio, and more	VW Transporter, VW Polo, Vauxhall Corsa, MG ZS, Ford Puma, Hyundai Ioniq and more	e.g. Nissan Juke, Vauxhall Corsa, and dozens of additional models	Toyota Yaris, Toyota RAV4, Toyota Proace, Toyota Co-rolla, Lexus LBX, and more
Notable cities	More than 250 cities in France	London	Brighton, Cardiff, Dublin, Edinburgh, Leeds, London, Manchester, Newcas-tle-Upon-Tyne and many more	Copenhagen, Gothenburg, Stockholm, and more

Examples of station-based operators (3/3)

Insights into selected operators

	greenwheels	mywheels	HYRE	Hertz 24/7
	Greenwheels is a leading station-based car sharing operator in the Netherlands and has 3,000 station-based vehicles nationwide. Founded in 1995, it offers services in various cities across the country.	MyWheels is a leading station-based car sharing operator that offers a mix of fixed and (neighborhood) parking zones. They run a fleet of around 3,000 cars. They are part of the Sharing Group and operate in urban areas across the Netherlands.	Founded in 2017, Hyre is a leading Nordic car sharing operator with ~2,500 vehicles across Norway, Sweden, and Denmark. Through its 'Car Rental 2.0' model, Hyre now spans downtown, replacement-car and airport segments.	Hertz 24/7 is the car sharing division of Hertz, one of the world's largest car rental and mobility solutions providers. Their car sharing service Hertz 24/7 has been operating for over 15 years now. They focus on shared transporters but also offer other vehicles and currently have a fleet of 1,500+ vehicles.
USP	Strong partnership with public transport operator NS	MyWheels has launched a large-scale Vehicle-to-Grid (V2G) car sharing service (link)	Dense Nordic coverage, including remote areas, via replacement-car partners, and strong presence at major airports	Available across many European countries
Vehicles used	VW Caddy, VW e-Up!, VW Up!, VW Golf, Skoda Citigo-e, and more	Renault 5, Renault Zoe, Citroen C3, Tesla Model 3, Opel Corsa, Hyundai Kona, VW ID3, and more	100+ different models including Skoda Ocavia, VW ID3, Renault Trafic, Polestar 2, Volvo XC60, Hongqi E-HS9 and more	Ford (Transit, Custom) Opel (Movano, Vivaro, Grandland), Seat Arona, Hyundai i30, Polestar and more
Notable Cities	Available in more than 200 cities	All main cities in the Netherlands	Bergen, Copenhagen, Oslo, Stockholm, Trondheim	Numerous cities across Europe. They open locations based on partner networks

2.2

Free-floating car sharing

European market overview

67k cars in use by up to 80 operators

Free-floating car sharing is widespread throughout Europe

Free-floating (FF) car sharing is a short- to medium-term car rental service where customers rent vehicles on demand and return them to any location within a defined geographic area.

The business model began to take off thanks to the pioneering role of station-based car sharing, followed by the increasing adoption of smartphones since 2006. In 2008, Daimler's Car2Go piloted a first major service in Ulm, Germany. BMW's DriveNow followed in 2011 as another pioneer. Today, it is a widespread car sharing business model across Europe (Fluctuo 2024). In 2023/2024, for the first time since we have been measuring the size of car sharing fleets across Europe, the number of free-floating car sharing vehicles exceeded the number of station-based car sharing vehicles.

The European market is growing and has over 67,000 free-floating car sharing vehicles from up to 80 operators in 28 countries in Europe*. One year ago, we identified 63,000 vehicles for the business model.

67k+ vehicles

Estimated FF fleet size (data as of Q2/Q3 2025)*

up to 80

Estimated number of FF operators (data as of Q2/Q3 2025)*

28

Countries with FF operators (data as of Q2/Q3 2025)*

***Info:** The 67,000+ European free-floating car sharing cars are an estimate based on publicly available national and individual fleet size statistics and desktop research. Russia and Turkey not included in above data.

Key European free-floating car sharing markets

Germany is Europe‘s largest free-floating market, followed by Italy and Poland

Germany
27,400 vehicles
3.3 cars per 10,000 people

Italy
7,300 vehicles
1.2 cars per 10,000 people

Poland
5,000+ vehicles
1.3 cars per 10,000 people

Belgium
3,650+ vehicles
3.1 cars per 10,000 people

Spain
3,200 vehicles
0.7 cars per 10,000 people

Other major markets
(sorted alphabetically)

- Czech Republic
- Denmark
- Hungary
- Latvia
- Lithuania

Sources: Desktop study + Germany (bcs 2025), Poland (own estimate based on public operator statements), Italy (2024 value by Osservatorio Nazionale Sharing Mobility 2025), Spain (AVCE 2025), Belgium (WayToGo 2025). Overlaps with other car sharing business models might be possible, as stated sources might use varying methods to combine their national values. Market overview excluding the transcontinental markets of Turkey and Russia.

Examples of free-floating operators (1/3)

Insights into selected operators

	MILES	Free2move	SIXT share	Bolt Drive
	MILES, founded in 2016, is the largest free-floating car sharing company in our report, with around 18,000 vehicles across all business models. They are one of the few free-floating companies that have a kilometer-based pricing model. Headquartered in Berlin they have a team size of 800 employees.	Free2move is one of the key free-floating car sharing operators in Europe. The company is owned by the global automaker Stellantis. The brand incorporated previous car sharing brands like ShareNow, Car2go, and DriveNow. Besides their European footprint, Free2move is also available in the USA.	SIXT share is a German car sharing operator that currently operates in Germany and the Netherlands. The strong SIXT brand gained a global footprint via its car rental service. Today, the SIXT app offers multiple additional services, including car and commercial vehicle rental, shared mobility, ride-hailing and car subscription.	Estonia's Bolt initially gained recognition for its ride-hailing and micromobility services before expanding into car sharing across various European countries. Please read the full interview with Bolt Drive's Diego Ramirez-Gölz on page 59.
USP	Largest European free-floating operator, also rental & subscription	Long history of car sharing, owned by the global automaker Stellantis	Synergies with the SIXT rental division, MaaS app beyond car sharing	Mobility platform offering ride-hailing, micromobility, and car sharing
Vehicles used	VW Polo, VW ID.3, Audi A4, Opel Corsa, Cupra Born, Mercedes Sprinter, Opel Vivaro, and more	Fiat 500e, Peugeot e-208, Citroen C3, Opel Corsa, Peugeot 2008, Alfa Romeo, and more	Opel Mokka, VW T-ROC, VW Golf, VW Touran, Audi A3, Audi Q5 and more	Audi Q2, Audi A3, Skoda Fabia, Toyota C-HR, Toyota Yaris, Renault Master, VW Crafter, and more
Notable Cities	Berlin, Cologne, Düsseldorf, Frankfurt, Hamburg, Munich	Amsterdam, Berlin, Hamburg, Madrid, Milano, Munich, Paris, Rome, Vienna	Amsterdam, Berlin, Ham-burg, München, Rotterdam, The Hague, and Utrecht	Berlin, Prague, Riga, Tallinn, Vilnius

Examples of free-floating operators (2/3)

Insights into selected operators

	ZITY	POPPY	enjoy	GreenMobility
	Zity operates a free-floating car sharing service in Madrid and Milan, primarily using the Dacia Spring. Its station-based car sharing sister brand is called Mobilize Share. The two brands are increasingly growing together, as evidenced by their new joint app, ‚Zity & Mobilize Share'.	Poppy is the leading Belgian free-floating car sharing service active in major cities and airports. In 2025, Poppy acquired autonomous driving and tele-driving company Ush.	Enjoy is a major Italian car sharing operator known for its extensive free-floating and station-based services. They offer subscriptions, car delivery, and other services.	GreenMobility operates a free-floating, all-electric car sharing system with around 1,400 cars in Denmark. In Copenhagen, it is available since 2016. The company is listed on the Nasdaq Copenhagen Stock Exchange market.
USP	Backed by Renault	Focus on Belgium. New tele-driving pilot	Focus on Italy	100% electric vehicles
Vehicles used	Dacia Spring	Audi A3, Opel Corsa, VW Polo, Toyota Yaris, VW Transporter, and more	Fiat 500, Fiat Doblo, XEV Yoyo, Toyota Yaris	Renault (Zoe, E-Traffic, Megane E-tech, Kangoo), Polestar, Mer-cedes (eVito, E-vivaro) VW ID.Buzz, Peugeot E-partner, Ford E-transit
Notable Cities	Milan, Madrid	Antwerp, Brussels, as well as airports in Antwerp, Brussels, and Charleroi	Bologna, Florence, Milan, Rome, Turin	Aarhus, Copenhagen

Examples of free-floating operators (3/3)

Insights into selected operators

	citybee	Traficar	SPARK	Voltio BY MUTUA
	Citybee offers a dense free-floating service across many towns in all three Baltic countries. The company offers a large variety of vehicles including passenger cars and transporters, as well as combustion vehicles, EVs, and hybrids.	The current market leader in Polish car sharing. Traficar operates a free-floating model, offering thousands of vehicles across numerous Polish cities. In addition to passenger cars, they also offer larger vans.	SPARK is a fully electric free-floating service that is available with 1,700 vehicles in Bulgaria and Lithuania. The company also offers electric charging for non-car sharing vehicles.	Voltio, backed by insurance company Mutua, offers 1,000 vehicles in Madrid, Spain. According to a February 2025 press release, Voltio has had more than 150,000 users since launching in late 2022. In total, these users have taken 1.3 million trips, covering over 12 million kilometers (Voltio, 2025).
USP	Large diversity of vehicle models available	Polish market leader, offers also kickscooters	Fully electric free-floating service in Eastern Europe	100% electric
Vehicles used	Ford Focus, Fiat e-500, Renault Master, Skoda Kamiq, Toyota Corolla, VW Tiguan	Renault Clio, Renault Arkana, Dacia Sandero, Dacia Dokker, Renault Master	Volvo C40 recharge, Audi Q4 e-tron, VW ID.4, Fiat 500e, Renault Zoe, and more	Fiat 500e, Opel Corsa-e
Notable Cities	Kaunas, Riga, Tallinn, Tartu, Vilnius, and more	Gdansk, Poznan, Kraków, War-saw, Wroclaw, and more	Kaunas, Plovdiv, Sofia, Vilnius	Madrid

2.3

Peer-to-peer car sharing

European market overview

40+ peer-to-peer operators in at least 29 countries

The largest car sharing business model by fleet size, but exact numbers are hard to track

In peer-to-peer car sharing, vehicles are owned by individuals or other companies, not by the operator. The operator acts as an intermediary between users and vehicle owners/providers, often functioning as a platform or marketplace.

Examples of operators include 2EM, Auting, Beep.rent, the Camplify/Paul Camper platforms, drivemycar, Forus Autolevi, Getaround, GoMore, Hiyacar, Snappcar, Turo, Woop Drive, and the Yescapa/Goboony platforms.

Fleet sizes can be very large, but the exact aggregated European fleet size is unknown. While station-based and free-floating cars are used most days of the year and often by multiple users per day, the P2P fleet also includes cars whose owners make them available on a P2P platform for only a few days per year. As a result, fleet size data from different business models isn't easily comparable.

High

Level of brand concentration

40+

Estimated number of major operators (data as of Q2/Q3 2025)*

29

Countries with P2P operators (data as of Q2/Q3 2025)*

***Info:** Russia and Turkey not included in above data.

Examples of peer-to-peer operators (1/2)

Insights into selected operators

	getaround	TURO	GoMore	SnappCar
	Founded in 2009, Getaround operates in 6 markets across Europe: France, Spain, Norway, Belgium, Austria, and Germany. The platform provides both manual and digital vehicle handovers through its „Getaround Connect“ technology.	Originally launched in 2009 as RelayRides, Turo has emerged as a major car sharing company globally, claiming at least 340,000 active vehicles on its platform worldwide.	GoMore operates in various European markets including Austria, Denmark, Estonia, Finland, Spain, Sweden, and Switzerland. In addition to car sharing, the company is active in car rental, car leasing, ridesharing.	Founded in 2011, Snappcar has established a strong presence in P2P car sharing in the Netherlands, boasting over 10,000 vehicles on its platform.
USP	Extensive fleet size across Europe, offering 24/7 access with keyless technology	Significant fleet size in France, the UK, as well as North America and Australia	Strong emphasis on Northern Europe; features keyless technology	Strong offer in the Netherlands
Notable Cities	Cities in 6 markets across Europe	Edinburgh, Lille, London, Lyon, Manchester, Marseille, Paris and many more	Aarhus, Copenhagen, Madrid, Stockholm, Tallinn	Amsterdam, Berlin, Hamburg, Rotterdam, The Hague, Utrecht

Examples of peer-to-peer operators (2/2)

Insights into selected operators

	hiyacar	yescapa / goboony	camplify / PaulCamper PRIVATE CAMPER SHARING	auting share your car
	Founded in 2015, Hiyacar is a British car sharing service that operates a P2P marketplace alongside a station-based offering. They also closely work together with local authorities, housing associations & property developers.	In 2023, Yescapa and Goboony merged, creating a service that offers over 30,000 P2P camping vehicles across Europe (promobil 2023). Both brands remain active in various European countries.	The two brands Camplify and Paul Camper are focussing on the holiday use case. Paul Camper was acquired by Camplify in 2022. The acquisition strengthens their market position.	Auting is an Italian P2P platform operating since 2017. They offer their service with thousands of cars throughout Italy. Auting built a community with 65,000+ renters and car owners, according to their website.
USP	Hybrid model with P2P and station-based services; key-less "QuickStart" technology for P2P access	Extensive selection of RVs and campervans; active in multiple markets	International platform of-fering seamless bookings in Europe and Oceania	Focus on Italy
Notable Cities	Bristol and Hove, Edinburgh, Greater London, Oxford, Wat-ford, among others	Thousands of cities across Europe	Many across Austria, Germany, Netherlands, Spain and UK	Approximately 150 cities across Italy incl. Bolgona, Florence, Milan and Rome

2.4

Other car sharing business models

Examples of models beyond free-floating, station-based, and peer-to-peer car sharing

Specialized business models

Beyond station-based, free-floating, and peer-to-peer solutions

Automated rental

By digitizing and automating the rental process, traditional rental companies have changed the user experience. Whether through apps or key stations, users now enjoy greater flexibility, managing bookings more efficiently. While automated rentals share similarities with car sharing, there are some key differences.

Operator examples:

- Toosla (FRA)
- UFODRIVE (GER, NED, UK, etc)
- Virtuo (FRA, ESP, POR, UK)

Corporate car sharing

Corporate car sharing allows employees to access shared vehicles for business use (and often also personal use). Some providers also extend their services to third-party customers.

Tele-operated car sharing

Tele-driving options are new and seeing cautious early pilots across the car sharing landscape. Vehicles are remotely driven to/from users. This model tackles the challenge of relocating cars for efficient use.

Operator examples:

- Poppy (BEL)
- Vay (USA)
- Halo (USA)

Community car sharing

Community car sharing is typically run by local operators, non-profits, or neighborhood groups. Often relying on partial volunteer support, these initiatives foster high local engagement and a strong connection between the operator and users. They focus on building a shared resource within close-knit communities.

Operator examples:

- OnzeAuto (NL)
- Dörpsmobil SH (GER)
- Stockholm Bilpool (SWE)

3

National deep-dives

Key insights and takeaways from external studies

Approach

Why and how we conducted the deep-dives

We curated and aggregated a selection of external national industry reports, creating shortcuts to valuable research.

Our selection criteria focused on:

- **Independence:** Reports produced by national car sharing associations or researchers with operator-independent findings.
- **Key Markets:** Focusing on significant European car sharing markets.
- **Data Availability**: Choosing sources with comprehensive and reliable data.

We spotlight nine key publications, each offering unique industry expertise and research methodologies. These reports provide deep insights into major European car sharing markets, helping readers explore the heart of Europe's car sharing landscape. While not the primary focus, this chapter also highlights two transcontinental markets that bridge both Europe and Asia.

Deep-dive 1: Germany

Report name: Carsharing-Statistik (bcs 2025)

Founded in 1998, Bundesverband Carsharing e.V. (bcs) is the national car sharing association of Germany, Europe's largest car sharing market. With over 200 members, bcs publishes annual car sharing statistics that show the size and development of the national market. Car sharing is available in more than 1,390 German municipalities and cities and is provided by nearly 300 operators. With its analytical publications, bcs helps to understand the very complex German car sharing market. The latest report was published in early 2025.

Key insights:

Fleet size:
45,400 vehicles in total
(+8.4 % YOY)

Free-floating:
27,400 vehicles

Station-based:
18,000 vehicles in station-based or hybrid systems

Widespread access:
1,393 municipalities with a car sharing offer (+108 YOY)

Operators:
297 (+4 YOY)

Electrification:
20.9 % of station-based fleet are EVs

Further reading:
bcs (2025)

bcs Bundesverband Carsharing

GUNNAR NEHRKE,
Managing Director, Bundesverband Carsharing e.V. (bcs)

„Europe's largest carsharing market continues to grow. This is good news for traffic reduction and improving the climate. "

Deep-dive 2: France

Report name: Baromètre National Autopartage 2025 (AAA 2025)

The Association des Acteurs de l'Autopartage (AAA) represents nearly the entire car sharing market in France. Its annual report gives a comprehensive national car sharing market overview - the Baromètre National Autopartage. The report by AAA, in partnership with ADEME and LAET, offers insights on fleet size, composition, user base, emissions, and regional distribution. The latest edition was published in June 2025.

Key insights:

Fleet size:
13,862 vehicles in 2025 (12,655 are attributed to station-based models, 1,207 to free-floating) across 25 participating operators

Members:
More than a million registered users; 390k unique users estimated

Business models:
Station-based models are more common than free-floating (larger fleet and more operators).

Electrification:
Free-floating vehicles are considerably more often electric (63%) than vehicles at stationary systems (8%).

Further reading:
AAA 2025

Association des Acteurs de l'Autopartage

NICOLAS FRASIE,
Co-Founder at Association des Acteurs de l'Autopartage & Head of Development and Public Affairs Europe at Communauto

„In 2025, carsharing has surpassed one million users in France. These users will more easily adopt electric vehicles without worrying about price, battery and charging-at-home. This is why supporting carsharing should be considered a public policy in its own right to accelerate the shift toward zero-emission mobility."

Deep-dive 3: Italy

Report name: 9. Rapporto Nazionale sulla Sharing Mobility (Osservatorio Nazionale 2025)

The Italian platform Osservatorio Nazionale Sharing Mobility, launched in 2015, comprises over 130 members, including providers, research institutes, municipalities, and local authorities. With more than 8,600 car sharing vehicles, Italy is currently the third largest car sharing market in Europe. The latest report showed a growing car sharing market between 2023 and 2024 end of year. However, the first quarter of 2025 saw a slight market consolidation. This annual report is a valuable resource for anyone interested in shared mobility (incl. Bikes, mopeds, kickscooters), offering comprehensive coverage of the national market along with various analyses. Well worth a full read.

Key insights:

Fleet size (2024):
8,647 vehicles (7,298 free-floating, 1,349 station-based).

Electrification:
35% of the combined free-floating and station-based fleet is electric-only, additional 38% are hybrid vehicles

Driven distance:
averages of 13.4 km (free-floating) and 27.1 km (station-based)

Travel time:
on average 85 min (free-floating) and 225 min (station-based)

Business models:
Free-floating providers have a larger fleet than station-based providers. The P2P model includes many operators.

Further reading:
[Osservatorio Nazionale 2025]

SHARING MOBILITY
Osservatorio Nazionale

LUCA REFRIGERI,
Osservatorio Nazionale Sharing Mobility

„Car sharing is one of the most effective tools to cut car ownership and traffic in cities and to advance sustainable mobility goals. In Italy, the sector is experiencing a marked downturn: stronger public policies are needed to support both demand and supply, revitalise the service, and close the gap with Europe’s more successful models.“

Deep-dive 4: Belgium

Report name: Shared Mobility in Belgium. Report 2024 (Way To Go 2025)

Way To Go (previously Autodelen.net) offers a comprehensive overview of the national car sharing market, covering free-floating, station-based, and peer-to-peer services. They also cover other shared mobility vehicle modes.

The 2025 report (Way To Go 2025) includes insights on car trips replaced, impact on travel behavior, a user survey of active car sharing users, many KPIs and user insights. Their annual overviews are a must-read for car sharing number crunchers.

Key insights:

Fleet size:
7,400+ station-based and free-floating cars across Belgium in 2024, plus another 1,500+ private car sharing cars. In Q1 2025, MILES left the Belgian market.

Example Operators:
Poppy, cambio, Dégage, Getaround, Wibee, Mobilize Share, Battmobility, Cozywheels, and more

Continued Growth:
Between 2020 and 2024, the number of shared cars increased 2.3 times.

Business models:
Station-based and free-floating models are both very strong.

Further reading:
Way To Go (2025)

JEFFREY MATTHIJS,
Director of Way To Go

„While the number of roundtrip shared cars keeps rising each year, 2024 was marked by a sharp decline in free-floating cars (-28%).“

Deep-dive 5: Netherlands

Report name: Staat van de deelmobiliteit 2024 (CROW-KpVV 2025)

CROW-KpVV and Natuurlijk!Deelmobiliteit (N!D) with support by Advier published its most recent national report on shared mobility in the Netherlands in March 2025. It covers the Dutch car sharing market, as well as other shared mobility modes. The report covers aspects such as operator overview, fleet size developments, electrification trends, regional product offer densities, and top municipalities. Interestingly, the report also includes a national shared mobility user survey with 5,000+ respondents.

Key insights:

Fleet size:
7,400 car sharing vehicles (incl. round-trip, free-floating, community-based, and keyless P2P), down 6% YOY. First small decline after years of very strong growth.

12 of 16 operators grow:
main reason for slight decrease in fleet sizes was the market exit of other operators.

Top cities:
Amsterdam, Utrecht, Rotterdam, The Hague

Electrification: 50% of the fleet is now electric (EVs + hybrid). Two years earlier, the electrification was at 37%.

Further reading:
CROW-KpVV (2025)

kennisplatform CROW

ARNE BRUGMAN
Shared Mobility Expert, Advier

„Car sharing is no longer just an urban phenomenon — smaller municipalities across the country are proving that with the right policies and attention, successful car sharing ecosystems can thrive beyond the major cities. “

Deep-dive 6: Spain

Report name: Carsharing Barometer 2025 (AVCE 2025)

The Association of Shared Vehicles in Spain (Asociación de Vehículo Compartido España, AVCE) was founded in 2020 and represents many Spanish car sharing operators. They constantly monitor, analyze and shape the Spanish car sharing landscape, and are an important voice in the transformation of the urban mobility system. The recent Barometer from June 2025 is already their second full annual car sharing statistic. While there are more car sharing operators in Spain than those presented in the report, AVCE offers a solid national overview of the main brands.

Key insights:

Fleet size:
3,891 vehicles in station-based and free-floating (only AVCE members, 2025 report). More vehicles from other operators.

Operators analyzed:
Free2Move, Getaround, guppy, Voltio, Wible and Zity

Users:
The AVCE members have a total of about 1.8 million registered users.

Electrification:
66% of the fleet are EVs, followed by 19% plug in hybrids. Therefore, Spain has an outstanding electrification rate.

Further reading:
Barómetro de la movilidad compartida 2025 (AVCE 2025)

Asociación Vehículo Compartido España

Deep-dive 7: United Kingdom

Report name: Annual Car Club Report (CoMoUK 2025)

CoMoUK is the UK organization for shared transport, a charity (NGO) dedicated to its social, economic and environmental benefits.

They cover services that share cars, bikes and e-bikes, rides in cars and e-scooters. They publish detailed annual reports on car clubs and shared micromobility based on operator data and user surveys, as well as a range of new research each year. The latest car sharing report is from mid-2025. They are the UK's leading public interest voice on mobility hubs that bring shared, public and active travel options together. CoMoUK organizes the UK's only Shared Transport Conference alongside face-to-face events and regular online webinars.

Key insights:

Fleet size:
4,383 vehicles publicly accessible, includes different car sharing business models, excluding closed corporate fleets. 5,477 including corporate fleets.

Fleet age:
Modern cars, as 61 % of cars are <2 years old

Active members:
307,000+ (+1% YOY) as of March 2025, station-based and free-floating combined

Business models:
Station-based car sharing widespread, free-floating provided by Zipcar in London

Electrification:
30% of publicly accessible car club cars are EVs (down from 35% one year earlier)

Typical use cases:
Leisure, shopping, visiting friends and family, and DIY projects

Further reading:
CoMoUK (2025)

RICHARD DILKS,
Chief Executive at CoMoUK

„While more people in the UK than ever before are using car club, the sector is facing significant cost pressures – particularly around the operation of EVs – which pose a problem. We continue our work to achieve a more positive policy environment for these really important cost and emissions cutting services to operate in.“

Deep-dive 8: Switzerland

Report name: Zahlen & Fakten zum Shared Mobility Markt Schweiz. Car Sharing Dashboard (CHACOMO 2025)

CHACOMO (Swiss Alliance for Collaborative Mobility) represents the shared mobility sector in Switzerland. It provides a collective voice in the political process and public debate for its over 30 members, who account for more than 12 million shared mobility trips per year. CHACOMO regularly publishes data, insights and statistics on the development of the shared mobility industry in Switzerland, including car sharing. Their car sharing dashboard is the premier national resource for car sharing data.

Key insights:

Fleet size:
Approximately 3,900 station-based car sharing vehicles. Another 7,600+ P2P vehicles. No active free-floating car sharing. Stable station-based car sharing fleet size and growing P2P fleet.

Users:
More than 334,000 registered station-based (+10 % YOY), and another 234,000 registered P2P car sharing users (+29 % YOY).

Operators:
15 car sharing operators (11 part of CHACOMO market monitoring)

Trips:
1.4 million trips in B2C car sharing (+1 % YOY)

Further reading:
CHACOMO (2025)

CHACOMO
Swiss Alliance for Collaborative Mobility

JÖRG BECKMANN,
Vice-president at CHACOMO

„Car sharing still spreads and rises in Switzerland! The number of Swiss cities served by either B2C or P2P car sharing continued to increase in 2024 (+30 towns) and has consequently lead to a further growth in usages. Switzerland's car sharing hot-spots are Geneva, Zurich and Basel, where one shared car typically replaces more than 20 private ones, according to a recent study by Switzerland's B2C market leader *mobility*. "

Deep-dive 9: Czech Republic

Report: AČC website (AČC 2025)

The Czech car sharing association "Asociace českého carsharingu (AČC)" offers national aggregated car sharing statistics for their association members Car4Way, Bolt Drive, Anytime, and Autonapul on their webpage. Further operators (beyond AČC) like 123-Transporter, Hertz 24/7, and Šárka, show that the market is truly a European car sharing powerhouse.

The Czech market is a great example for the striving car sharing markets across Eastern Europe (e.g. in Poland, the Baltic states, Hungary, Bulgaria and Slovenia).

The AČC data shows that the association members grew fast from just 90 car sharing vehicles in 2015 to almost 2,000 today.

Key insights:

Fleet size:
AČC alone represents nearly 2,000 vehicles (free-floating and station-based) from its members. In addition, there are more cars from operators beyond the association.

Cities:
Car sharing by AČC members is available in 12 cities across the country. Prague is the hotspot of Czech car sharing.

Business models:
The backbone of Czech car sharing market are the free-floating and P2P models.

Further reading:
AČC (2025)

Zooming out: Transcontinental markets

Turkey and Russia are not in primary focus of this publication, but have considerable fleet sizes

Although not the main focus of this publication, we would like to highlight the two bridge markets that span both the European and Asian continents. While the Turkish market is estimated to have a car sharing fleet of thousands of vehicles, the Russian market alone is estimated to have tens of thousands of car sharing vehicles. In both country markets, free-floating business models play a key role in the local car sharing culture. A recent key development in Turkey was the acquisition of Getir Drive by TikTak.

We are pleased that Ersan Öztürk, founder of the Turkish car sharing operator TikTak, gave us an in-depth interview for last years Barometer.

Top market insights:

Selected operators in both countries:
Turkish operators inlcude TikTak, Yoyo, or Rentiva. Russian operators include BelkaCar, Delimobil, Yandex. Drive, and City Drive.

Business models:
In both countries, the free-floating model is the most relevant business model.

Main cities with car sharing offer:
Istanbul, Ankara, Izmir, Moscow, Saint Petersburg.

ERSAN ÖZTÜRK,
Founder at TikTak (Turkish car sharing operator)

„The Turkish car sharing market has grown rapidly due to urbanization, high vehicle costs, and the need for flexible, on-demand mobility solutions.“ (...)

„A key challenge in Turkish car sharing is limited public awareness of alternative mobility solutions.“

4

Interviews

Talking to experts from European car sharing operators

Marie Reboul

CEO

Getaround

Europe

Founded in 2009, Getaround operates in hundreds of cities across Europe with more than 50,000 active vehicles on their platform. They are active in six markets: France, Spain, Norway, Belgium, Austria, and Germany. The platform provides both manual and digital vehicle handovers through its „Getaround Connect" technology.

getaround.com

How has the P2P car sharing market in Europe developed over the past five years?

We've seen P2P carsharing becoming an increasingly popular transportation option in Europe, with strong adoption in recent years. Rising car ownership costs and the demand for convenient and flexible alternatives have been pushing individuals to adopt it.

At a higher level, there are structural trends like urban densification and expanding public transit infrastructure, that are reducing the need for private cars, and creating a need for space-efficient mobility means.

European cities and local public authorities are also promoting P2P carsharing as they reallocate urban space and look for sustainable alternatives to individual car ownership. We lead the way in that effort: our platform leverages existing vehicles, scales without subsidies, and meets urban demand sustainably. Europe is now a global hotspot for us, with rapid growth in Paris, Brussels, Barcelona, Oslo...

In addition to private users, Getaround also serves professional fleet owners. How do you enable fleet owners on your platform?

Getaround was founded around private car owners, but over the years professional fleet owners have become a unique part of our ecosystem. They allow us to meet demand with high availability, great parking locations, and a broad vehicle mix.

To support them, we have developed the Getaround Entrepreneur Program, which gives them access to tailored tools like fleet dashboards, dynamic pricing features, and large-scale keyless integration options. We bring them highly qualified rental demand, tailored insurance, customer and claims support, that enable their business to thrive in major urban hubs.

By serving both private owners and pros, our platform stands out. We enable individuals to earn extra income, and entrepreneurs to build successful businesses in the mobility space.

Keyless access is an important P2P car sharing market trend. What type of car owner typically chooses Getaround Connect, and what is the potential of keyless access for P2P?

Our Getaround Connect technology attracts two segments: urban private owners that value flexibility and hassle-free income, and appreciate the convenience of not having to meet renters in person, but also professional fleet operators that leverage the platform to manage dozens or hundreds of vehicles at scale, and handle rentals seamlessly.

Keyless access is a major enabler of P2P carsharing. It makes the service truly on-demand: drivers can book, unlock, and return a car with their smartphone, without the friction of coordinating with the car owner. This boosts convenience, increases utilization, and supports expansion into neighborhoods where handovers are impractical.

How can the success of EVs in your Norwegian market prepare us for the electric transition in markets with fewer EVs? What are the key takeaways?

Norway is a unique case study for us, with 90% of new cars sold being electric. It gives us early insights into the EV transition, from charging integration to user behavior.

Three key lessons emerge. First, users adopt quickly once charging networks are developed and reliable. Second, many want to try electric driving but worry about range or charging. Third, operational details matter. Providing optimal charging locations, range-based pricing, and incentives for proper returns is essential. Clear guidance, reliable infrastructure and user education are crucial to boost adoption and ensure a great user experience.

These insights give us a head start in other markets, where EV adoption is rising but not yet as widespread as in Norway.

Sabine Wagner

Director Mobility Solutions Europe

Hertz 24/7

Europe

Hertz operates a portfolio of vehicle rental brands – including Hertz, Dollar, Thrifty, and Firefly – across more than 11,000 locations in 160 countries. In addition to their core rental business, they provide a range of complementary mobility solutions. In Europe, Hertz 24/7 offers flexible, station-based car sharing options for users seeking short-term, on-demand access to vehicles.

hertz247.com

How would you evaluate the ongoing digitization of traditional car rental offers? To what extent are future car rental offers becoming more like car sharing offers?

The digitization of car rental is fundamentally reshaping how customers interact with mobility services, and their expectations have shifted towards seamless digital experiences. This transformation is blurring the traditional boundaries between car rental and car sharing, creating models that combine the best aspects of both.

Keyless access technology and comprehensive app-based booking systems are becoming standard offerings. We're also seeing the adoption of more flexible pricing models, including subscription-based options that mirror the convenience and predictability that car sharing services have pioneered. Behind the scenes, advanced fleet utilization analytics and remote management tools are dramatically improving operational efficiency, allowing us to optimize vehicle placement and maintenance schedules in real-time.

What takeaways can you share when comparing your various Hertz 24/7 locations across different European countries?

We are in the midst of a multi-year transformation to position Hertz for the future of mobility and, with digitization transforming the mobility industry, we are leveraging technology across our business to improve our operations and enhance customer experience. We have applied these principles to the roll out of Hertz 24/7 with the expansion anchored by three core pillars: comprehensive digitalization, operational cost-efficiency, and an enhanced customer experience that prioritizes convenience and accessibility.

Across all markets, we've observed consistent customer adoption of digital booking systems and keyless entry technology. From an operational perspective, technology integration has proven invaluable in reducing overhead costs while streamlining fleet management processes.

However, each European market presents unique differences that directly influence adoption rates and require tailored service models. Parking availability varies dramatically between cities, regulatory frameworks differ significantly, and consumer behavior patterns reflect distinct cultural preferences and mobility needs. These localized factors have taught us that successful expansion requires both technological consistency and market-specific adaptation.

How and where do you collaborate with TNCs (transport network companies like Uber)? What is your primary service offering to this group?

Our Rideshare program enables drivers to rent vehicles for use on platforms such as Uber, Lyft, and Bolt with weekly contracts, flexible terms and no long-term commitments. It provides an accessible entry point for those without personal vehicles and supports income generation on their own schedules. We also handle maintenance and insurance, with vehicles are pre-approved for use with no additional vehicle inspection requirements. With more sustainable electric vehicle options available, there is also the economic benefit of excluding them from emissions related charges in some cities. We also offer opportunities for drivers to own their own vehicle - in the UK, our Rent2Buy program allows drivers to trial vehicles for four weeks at a special low rate, with the rental amount waived if the car is purchased.

Building on the insights and experience of our Rideshare customers in the U.S., we have now expanded it to the UK, Netherlands, and France, and we continue to look for opportunities for further growth.

Diego Ramirez-Gölz

Regional General Manager
Central Europe

Bolt Drive

Europe

Bolt Drive is currently offering its own cars in Czech Republic, Estonia, Germany, Latvia, and Lithuania. On top, they also offer car sharing via partner fleets in other countries such as Poland. Beyond car sharing, Bolt is well known for other products such as ride hailing, food delivery, shared micromobility.

bolt.eu

Tell us more about the Bolt ecosystem approach. Of your Bolt Drive users, how many also use your other services, such as ride-hailing, shared micromobility, and food-related services?

At Bolt, we think in user journeys. Whether it's a five-minute e-scooter trip, a ride-hailing pickup to the airport, or a spontaneous weekend getaway via Bolt Drive: Our goal is to be the go-to app for every urban mobility need. And it works: in our mature markets, one in three Bolt Drive users also frequently uses another Bolt service, most often ride-hailing. This multi-service engagement is no coincidence; it's core to our expansion logic. We only launch Bolt Drive where we already have strong local traction. That gives us a powerful head start and a unique growth engine: every Bolt user is a potential car-sharing customer - if not right away because they are too young, then definitely in the future. The more services we offer in a city, the more likely users are to leave their private car behind.

MaaS (Mobility-as-a-Service) comes in many forms. Could you describe Bolt's MaaS approach and explain how you would characterize user demand for external mobility services through your app?

Bolt's MaaS approach is rooted in pragmatism and partnership. In selected cities, we integrate external fleets into the Bolt app to expand choice and coverage - while helping partners access our demand. We currently operate two integration models:

- Deep software integrations, where the partner fleet appears directly in our app (e.g. with MILES in Germany), and
- IoT-based integrations, where we install our own hardware in partner vehicles, enabling exclusive access and seamless user experience (e.g. with Admita in Lithuania).

In both cases, Bolt facilitates the trip and acts as the marketplace. This model allows us to build localized ecosystems while keeping our platform agile and responsive to market needs. Our users gain access to thousands of vehicles they otherwise wouldn't find in one place. Partners get access to Bolt's users and generate additional demand. Cities get a modal shift. Everyone wins.

Among the five car sharing markets in which Bolt Drive is currently offered, what differences in user behavior and operations do you observe?

While Bolt Drive operates under one brand, mobility is deeply local. In the Baltics, car-sharing is largely functional - used for commuting or utility trips. In Western and Central Europe, it's more lifestyle-oriented - weekend getaways or flexible mobility for car-free households. The policy context matters too: onboarding is faster and more secure in markets where we can access government registries to verify user data. That's not the case everywhere. And behaviors vary as well: in some Western cities, vandalism and smoking inside vehicles are recurring issues, while in others we may face other challenges. One issue we see across all markets is speeding - especially among young users - which we take very seriously, applying technological and operational measures to address it. Understanding these patterns helps us optimize safety and service quality for our users.

Which new technology would push car sharing forward the most if you could have it by tomorrow?

Often our users contact our CS support because of dashboard warning signals. Some of those touchpoints - which are time-consuming for the user and generate costs for Bolt - are unnecessary and turn out to be because the user does not fully understand their meaning. This is perfectly fine because it's our role to help the user but I believe that the vehicle infotainment system and Gen AI could play a better role here and directly help the user in case of doubt, e.g. through voice. Some OEMs are actively addressing this. If we extend this thought, other hints from the car-sharing operator could be delivered via voice, especially while the user is on his ride and should not have the phone on his hand to use our App.

Hermann Trick

CEO

Stadtmobil Stuttgart

Germany

Stadtmobil Stuttgart is part of the Stadtmobil group that is one of Germany's largest station-based car sharing brands. The Stadtmobil group boasts a robust network of stations in regions such as Rhine-Ruhr, Rhine-Main, Berlin, Stuttgart, Hanover, and Karlsruhe. The regional players are independent operators with a joint brand. Stadtmobil Stuttgart has a very dense network with hundreds of car sharing stations across Stuttgart metropolitan area.

stadtmobil-stuttgart.de

How has Stadtmobil Stuttgart enabled its growth over the past few years?

Stadtmobil Stuttgart has had a good run thanks to its close collaboration with the city of Stuttgart and bordering municipalities, that have utilized public parking space tenders. The car sharing law has played a significant role in ensuring that we can maintain visible and easily accessible parking spaces. To expand our business, we rely on good parking spaces, especially in the city centers, as this is the limiting factor. With the help of our affiliate StadtMobil e.V., which focuses on specific rural areas around Stuttgart, we have also experienced considerable growth in the surrounding areas. It is important to us that we always maintain a good balance between availability and utilization. Only then is car sharing profitable for us and attractive for our customers.

The European car sharing fleet is much more electrified than the privately owned car fleet. What needs to be done to accelerate the electrification of car sharing even further?

Cities must help provide suitable infrastructure, as we as car sharing providers can only do so to a limited extent. Higher vehicle acquisition costs, expensive charging infrastructure, and the prevalent customer reluctance to embrace the new technology are hindering the proportion of fully electric vehicles in our fleet.

How do you work with cities and governments? How would you describe your relationship with city administrations and regional partners?

The cooperation, especially with the city of Stuttgart, is excellent. This enables us to provide suitable public parking stations for our customers in Stuttgart's city center. Our suggestions are listened to and largely incorporated into the city's planning process. We are grateful for this, as this is not something to be taken for granted. Of course, things are also going well with other cities, but decisions often take a long time because, unfortunately, there is still no standardized approach, and the processes must be developed first.
We believe that car sharing standardizations or respective guidelines for cities and municipalities would be highly desirable for all partners.

What makes a great car sharing station? What data can you use to choose the best spots?

An optimal car sharing station should be well connected to public transport. This makes it easy for our customers to transfer from bus or train to a car sharing vehicle. It should also be above ground and signposted, so it's clear and easily visible that a service is available locally, even if there aren't any cars. The more densely populated the area and the better the public transport system, the higher the likelihood that the location will be well-received. Furthermore, several vehicles should always be located at a station to present an attractive service with a variety of choices and sufficient availability. Having just one vehicle is often a deterrent. Therefore, we always strive to set up several vehicles at any promising location as soon as possible.

Erik Tahkola

CEO

Omago

Finland

Omago is a Finish car sharing provider with 500+ car sharing vehicles across different business models and target groups. They focus on a combination of station-based, free-floating and corporate car sharing for various user groups. Being headquartered in the capital Helsinki, Omago has been able to expand the service to more than 40 locations nationwide, extending across the entire country, from northern Lapland to the southern coast.

omago.fi

You offer a variety of car sharing options to your users. What products do you offer, and which user groups do you serve?

Omago provides a spectrum of different car sharing services designed to meet the needs of both private users and different public and private organizations. We are known for our station-based, regional service, with defined home areas where vehicles are publicly available around the clock, complemented with a smaller free-floating fleet. With 200 mostly hybrid cars, it is widely used by individuals, families and businesses for daily errands, leisure trips, and working life needs from on-demand rentals to pre-booked daily bookings. Other services with 300 EVS and hybrids are tailored for housing/condo needs and corporate fleets. In residential communities, residents benefit from a dedicated vehicle parked at their building, reducing the need for multiple private cars and supporting sustainable living. For employers, we deliver a modern fleet option that combines sustainability with cost efficiency, while enabling employees to use the same vehicles seamlessly for professional and private needs. We are committed to customizable digital solutions, which we view as a necessity in the steadily growing Finnish market. Car sharing in Finland has traditionally focused on the largest cities with good public transport networks, but through flexible, customizable products and cooperation Omago has also been able to expand the service to more than 40 locations nationwide, extending across the entire country, from northern Lapland to the southern coast.

What is the current state of the Finish car sharing market, and where is it headed?

The Finnish car-sharing market has been hit with bankruptcies and exits for the last 10 years, but is currently building a fresh momentum. For years, both small and large operators exited the market, while overall economic headwinds tested the resilience of those who remained. Rising interest rates forced not only operators but also private individuals to reconsider their mobility choices. As a result, the number of active operators has shrunk, and today there are only a few car sharing providers left in Finland. Fleets are mostly station-based, but Omago has now reintroduced the free-floating service, marking an important step in diversifying the market. The relatively modest scale illustrates both the challenges the market has faced and the opportunities for growth as demand continues to build. For a growth-driven company like Omago, this means looking beyond our home market. We continuously explore opportunities in other regions where our experience in shared mobility can create value. At the same time, we look into the traditional car rental industry as well as long-term rentals, as those markets are more mature and bigger even in Finland.

Which national and regional policy measures affect you as a car sharing operator?

The recent weak economic development influences demand, but it is not necessarily bad news for car sharing. In a market where private car ownership remains the dominant form of mobility, Omago offers an alternative that combines convenience with real cost savings. On a regional level, collaboration with authorities is vital in the demanding demographic environment, but the small size of the shared mobility industry brings its own challenges to these efforts. With only a handful of operators and a still modest, though fast-growing, customer base, it is understandable that policymakers occasionally make decisions that do not fully reflect the realities of our industry. For example, in several major Finnish cities, current parking frameworks create big barriers to running car sharing services that are both viable for operators and convenient for customers. The industry has also been downplayed a lot in the Finnish media coverage which also affects the decision-making as well as limits the public awareness. Of course, we see it as our responsibility to change that by staying visible, speaking up, and making sure our impact feels larger than our actual size. Some cities have noticed the industry and the benefits we can bring to the table. But we wouldn't mind having more car-sharing operators in the Finnish market doing the talking with us!

Paul Kreiner

Product Manager Booking | Electrification Strategy Lead

cambio

Germany & Belgium

cambio is an early car sharing pioneer in the market with a focus on Germany and Belgium. With over 230,000 customers and a fleet of several thousand vehicles in 46 German and more than 130 Belgian cities, cambio is one of the largest station-based car sharing providers in Europe.

cambio-carsharing.com

What does your current electric vehicle fleet look like? How has it changed over time?

Our electric vehicle journey started in 2011 with the Mitsubishi i-MiEV. Early on, we realized electric vehicle bookings needed more than just time slots – so we began guaranteeing a minimum range for every electric car booking, and at cambio we still hold ourselves to that today, because a car with an empty battery is not the reliable mobility we are committed to offer. Small yet fully featured cars are our backbone, the Renault Zoe fulfills just that and powered our first scaling phase thanks to its reliability. More recently, we've leaned into models that also exist as combustion engine versions with automatic drivetrain to make switching easier for customers – especially the Opel Corsa. We also use estates and vans where it fits. We've grown our electric car fleet to nearly 800 vehicles, driven by conviction, but future growth largely hinges on strong municipal support and the availability of cars more suitable for carsharing.

How does your fleet electrification differ across markets? What can we learn from your most successful markets?

Electrification looks very different by city. In our most mature locations, roughly one in three cars is electric – and that's where things get tricky and the real learning starts. Many operational challenges only surface at higher EV shares: logistics across stations, peak-time availability, and edge cases that don't fit neat playbooks. The key success factor is efficiency driven by software. We tightly integrate the customer app, booking system, and fleet operations, using live vehicle and charging data (state of charge, charging status) to automate decisions and handle exceptions quickly.

What's your biggest challenge for further EV rollout?

Our biggest challenge is making high electric vehicle shares work in every neighborhood by covering all use cases. Inner-city trips are straightforward, and regional trips are addressed by our guaranteed-range approach. Long-distance travel, however, imposes tougher requirements: higher real-world range, strong fast-charging performance, and comfort at motorway speeds. During holiday periods, it's common for more than two-thirds of our fleet to be "on vacation" with users – so if our electric cars aren't vacation-ready, we can't meet demand. The takeaway: we need vehicles that reliably meet long-distance requirements. Today, those electric vehicles typically come at roughly double the total cost of comparable combustion engine models. That cost gap is the primary bottleneck to scaling electrification further, even with strong municipal support.

What policy support does cambio need in order to further electrify its fleet?

Carsharing works best when stations are close to demand and clearly visible – so designated on-street spots are crucial. To electrify these prime locations, we need municipalities to back station electrification in public space. A strong reference is the "Bremen model": the city provides and manages the core site infrastructure, while the carsharing operator installs its own wall boxes that integrate with its backend and can be removed or replaced if operators change. Without that kind of support, electrification becomes a slow, non-scaling exercise – chasing sites with the right legal setup, a willing landlord, and grid access, often far from where demand is. To ensure the drivetrain transition doesn't undermine the broader transport transition, municipalities must enable carsharing charging infrastructure on public ground.

Pablo Campos-Ansó Fernández

Founder

guppy

Spain

guppy is a Spanish car sharing operator that offers a mix of station-based and free-floating services in locations such as Madrid, Asturias, Cantabria, Bilbao, and San Sebastián. Its entire fleet consists of electric vehicles. Since our last Barometer in 2024, guppy has purchased and integrated GoTo's Spanish car sharing fleet, thereby expanding its market presence.

guppy.es

guppy operates under a business model that combines station-based and free-floating car sharing. Tell us more about the opportunities and challenges of this approach.

The ease and convenience we offer users by eliminating prior reservations, visits to physical offices with limited hours, and allowing full management of rentals through the app is what sets us apart most.

Many users are used to renting a vehicle for a short city trip, but not for a longer weekend getaway. They're accustomed to booking online, then going to a physical office to pick up keys and sign paperwork. guppy offers the opportunity to have any city you choose at your fingertips.

We've always taken pride in the core pillars of guppy: sustainability and our desire to change how people move. While not everyone is sold on electric vehicles, more people are joining us.

How did the Spanish car sharing market perform in 2024 and 2025? What are your expectations for the near future?

In 2024, AVCE (Spanish Association of Shared Vehicles) members provided a total of 3,891 car sharing vehicles with different operating business models. According to AVCE data, 81.96% offered free-floating car sharing, while 18.04% belonged to the station-based model. Additionally, the total fleet has grown by 29.9% over the last 4 years, with two out of three vehicles being zero-emission.

The sector's national presence is increasing, with 24 municipalities now offering direct access to this service and providing sustainable mobility to over 10 million inhabitants.

We hope to keep increasing the number of trips and consolidating the trend since 2021. In 2024, for example, trips approached 4 million, a 25.13% increase over 2021.

And, of course, we expect that recent policies such as the European Green Deal and the 2030 Climate Targets Plan will truly strengthen the EU's commitment to sustainable mobility, setting emission reduction targets and promoting public transport and shared mobility services.

How do you build meaningful partnerships to help your business grow? Which partnerships have elevated your business to the next level?

At guppy, we provide a service that is not just car sharing but a way of understanding mobility inspired by sustainability and innovation. Anyone who shares our values can be part of our guppy wave.

We continue collaborating with other companies and entities to improve services, carry out promotions, and provide initiatives that benefit our customers.

For example, support from public administrations such as the Municipality of Gijón or Torrelavega has given us a very positive boost. One of our challenges is to ensure community well-being, and integrating guppy with public administrations reinforces our commitment to a more sustainable and fair future.

What role do incentives play for your users? How do incentives like your guppy coupons support your business?

The user has been our priority since guppy's beginning, and we've looked for ways to benefit them both practically and financially. Variable rates based on usage, guppy coupons, subsidized trips...

However, we've found that most users are satisfied with the service and don't need a financial incentive to use it. For example, so far this year, 44% of rentals have been paid with guppy balance, less than half of all rentals, with an average of 882 rentals per day.

Convenience, environmental respect, and our guppy philosophy don't compete on price.

5

Trends

Our Top 5 European car sharing trends

Top-level trends (1/2)

Aggregated observations of the European car sharing space

Key stakeholders are calling for more support for electrification

Electrifying car sharing fleets is highly desired but comes at a cost. To address some of the major challenges, operators and associations are increasingly calling for support at the European, national, and regional levels to accelerate the transition.

Examples:

- A group of associations (incl. French, Italian, Austrian, and Basque car sharing associations) called on the European Commission to support the electrification of car sharing across Europe. (AAA 2025b)
- The German car sharing association issued a statement regarding a planned EU regulation on clean corporate fleets. (bcs 2025c)

Operators focus on increasing profitability

Many car sharing services share the common goal of increasing profitability further to sustain future growth scenarios. Areas of focus include utilization rates, operational excellence, vehicle purchase/leasing prices, internal processes, leveraging AI, and targeting new customer groups, etc.

Further digitization of user and vehicle documents is on the rise

Use cases such as digital driver's licenses and digital vehicle documents have the potential to increase operational efficiencies in car sharing.

Examples:

- The EUDI-Wallet (European Digital Identity Wallet) initiative aims to standardize digital identities across Europe, a process that is currently underway. One key aspect is the mDL (mobile driving license). (European Commission 2025) & (Potential 2025)
- Comment by the Bundesverband Carsharing on the proposed changes to the German Road Traffic Act (StVG). (bcs 2025d)

Top-level trends (2/2)

Aggregated observations of the European car sharing space

Expanding service portfolios

In the past, several large car sharing brands have diversified their service portfolios and business models. Some key players have expanded to offer a wide range of mobility services that often go beyond traditional car sharing.

Examples:

- Through its ‘Car Rental 2.0’ model, Norwegian operator Hyre now spans downtown, replacement-car and airport segments.
- Station-based operator Hertz 24/7 also specifically targets rideshare drivers with long-term rental options. Explore the interview with Hertz 24/7 on page 58.

The car sharing industry is applying more AI use cases

An increasing number of operators in Europe and beyond report using AI. Stanley Lo, from Taiwanese car sharing operator iRent, states that “AI is poised to play a key role in accelerating the adoption and advancement of shared mobility”.

Examples:

German supplier Moqo recently summarized use case examples:

- Damage management
- Fleet management
- Identify verification
- Smoke detection
- Fraud prevention

6

Summary

Main takeaways

Summary (1/2)

Key insights from the report

The European fleet size increased by 8% last year (free-floating + station-based combined). For the second time, Europe's free-floating car sharing fleet was slightly larger than the station-based fleet, with an estimated 67,000 free-floating vehicles and 62,000 station-based vehicles on the continent. This marks the largest market we've ever recorded for both business models.

Europe is the most diverse global car sharing market, with hundreds of brands in global car sharing: at least 470 operators run station-based systems, up to 80 operators free-floating systems and more than 40 operators P2P systems.

We analyzed car sharing systems across 42 countries.

The top five combined free-floating and station-based markets are Germany, France, Italy, Belgium, and the Netherlands. Among these, Belgium and Germany boast the highest car sharing density, with more than 5 vehicles per 10,000 inhabitants.

Several P2P operators have very large fleets. We have identified P2P services in 29 countries.

Summary (2/2)

Key insights from the report

Millions of users have registered for car sharing services, and local data from our country profiles indicate that the customer base continues to grow across the continent.

The electrification of car sharing across Europe is typically significantly higher than in owned car fleets. Therefore, car sharing not only increases the electrification of the European car fleet but also helps users to gain electric driving experience and therefore helps to increase the speed of electrification.

Top level market trends:

- Key stakeholders are calling for more support for electrification
- Operators focus on increasing profitability
- Further digitization of user and vehicle documents is on the rise
- Expanding service portfolios
- The car sharing industry is applying more AI use cases

7

About and Sources

Who is INVERS and reading tips

About INVERS

Who we are

INVERS enables carsharing operators to launch and operate fleets at scale with integrated hardware and software. As the inventor of automated vehicle sharing, Invers is developing and reliably maintaining the fundamental building blocks to offer its customers cost-efficient and easily implementable technical solutions.

The company acts as an independent and reliable partner for operators of services such as car sharing, rental and car subscription services with the vision to make the use of shared vehicles more convenient and affordable than ownership. Customers include Cambio, Citiz, County of Ventura, Enterprise Car Share, Europcar Mobility Group, Flexicar, Free2move, Flinkster, Getaround, GreenMobility, Greenwheels, Hertz 24/7 CarSharing, Miles Mobility, MyWheels, Poppy Mobility, Seattle City Light, Toyota Kinto and Zity. The company was founded in 1993 and has locations in Siegen, Cologne and Vancouver. The development takes place in Germany.

www.invers.com

Start and scale your car sharing

Connect your fleet, automate your rentals, and secure profitability on the INVERS platform

Secure reliable connectivity for your fleet

Make any vehicle shareable on the INVERS platform and benefit from lightning-fast response times anywhere in the world.

Automate rentals for maximum efficiency

Scale your business and create a seamless customer experience with a digital, keyless rental process and remote control over vehicle functions.

Protect your cars with real-time insights

Receive real-time alerts for dangerous incidents and bring transparency into rentals to keep your fleet and your revenue secure.

Optimize operations to drive profitability

Minimize vehicle downtime, guarantee successful rentals, and increase fleet utilization with our growth-oriented tool stack.

Contact our experienced sales consultants to discuss your needs

Talk to our shared mobility experts

Other free INVERS reports and white papers that you will enjoy reading

Perfect for your own research, business development, product or expansion planning

Car Sharing in North America

(50 pages)

Why read it?

- A white paper with full focus on the car sharing marketing in the USA, Canada and Mexico.
- 50 pages full of insights, expert interviews and trends from this market.
- Best approach to understanding the local market.

Read the White Paper

Microcars in European Carsharing

(35 pages)

Why read it?

- Discover the eight current countries with microcars in car sharing.
- Explore nine featured microcar models.
- 17 from 550+ European operators use microcars. Find out how and why.

Read the White Paper

Car Sharing in East and South East Asia

(50 pages)

Why read it?

- Explore ten regional key markets with 60+ analyzed operators
- 20 featured operator profiles including leading global brands
- Deep-dives of Japan, South Korea, Taiwan, and Singapore
- 6 expert interviews with local experts

Read the White Paper

INVERS webinars: Exploring car sharing expertise

Unlock valuable insights with industry experts

Growing and Scaling Car Sharing Fleets - Lessons Learned

- Key considerations before scaling
- Identify signs that your telematics systems might be holding you back
- Keeping the total cost of ownership and operations low

Speakers:

- **Kinto** (Jason Zahorik, Group Manager)
- **Kinto** (Jimmy Ouyang, National Manager)
- **INVERS** (Chris Anderson, Sales Director)

Watch the webinar

Advanced data for shared mobility operations

- How to generate and use data to identify and reward vehicle-friendly driving styles and behaviors
- Why effective data visualization tools improve accident and incident response times and investigations

Speakers:

- **MILES** (Nitin Maslekar, Head of Product and Technology)
- **INVERS** (Christoph Müscher, Product Management)
- **INVERS** (Christoph Mülder, Field Application Engineer)

Watch the webinar

Crucial Lessons from Growing Shared Mobility Operations

- North American perspective
- The pros and cons of running your own operations vs. contracting it out
- What you need to know about the market you're entering, and how much time is needed to plan before launch

Speakers:

- **movmi** (Sandra Phillips, Founder & CEO)
- **Mondofi** (Leigh Angman, Founder)
- **INVERS** (Chris Anderson, Sales & Partner Manager)

Watch the webinar

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