INVERS

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European Car Sharing 2026

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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 (stable YOY)

STATION-BASED/ ROUND-TRIP	FREE-FLOATING	PEER-TO-PEER
470+ Operators	**<80** Operators	**<40** Operators
64k+ Fleet size	**65k+** Fleet size	Fleet size not quantified

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

Station-based and free-floating car sharing account for **129,000 vehicles** across Europe. The car sharing fleet size remains at an all-time high and is the **same size as last year**. The fleet development varied across national markets.

Car sharing is significantly larger than three years ago: **The aggregated station-based and free-floating fleet is 23% larger today than in 2023**. Over the past 12 months, a few markets sent strong policy signals. France is a notable example, where its transport minister announced ambitious car sharing targets for 2031.

In some European markets, car sharing has been in the headlines this year. Operators such as Zipcar and Zity exited the European market, while other operators expanded their footprint or merged, and new operators entered. The policy environment is more important than ever, making strong national car sharing associations and networks essential.

Tracking the market does come with challenges as business models converge. Beyond the data in this report, we also observe a strong corporate car sharing segment and the continued digitalization of car rental. Welcome to the **INVERS Mobility Barometer on European Car Sharing 2026**, our guide to this evolving market.

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 2026 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

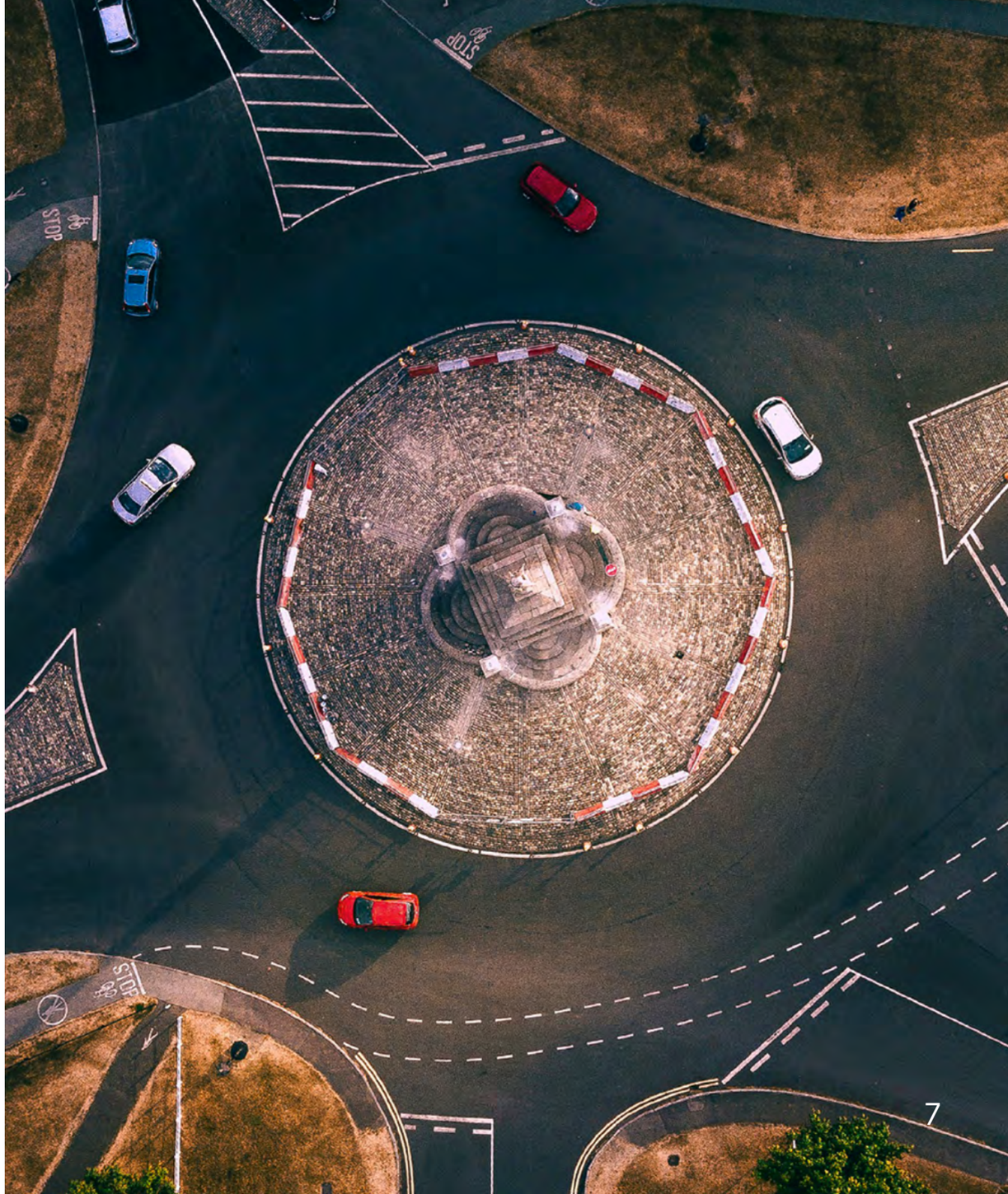
Purpose

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 combines existing industry knowledge with new insights from in-depth industry interviews and analysis of the current market landscape. It covers the station-based, free-floating, and peer-to-peer business models, drawing on publicly available but previously fragmented data. The Barometer is a meta study that aggregates existing annual national report data from car sharing associations, where available. Any data gaps are filled using other sources, including direct inquiries to operators and desk research. The market is highly complex, and business model characteristics varying by country.

Other models, such as corporate car sharing and automated rental, are outside the scope of this report. The Barometer looks at all European markets except Turkey and Russia as they are trans-continental markets.



Highlighting the three key business models of this Barometer

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

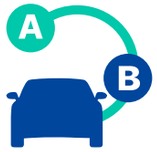


Station-based / round-trip car sharing

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

Operator examples:

- Citiz (FRA)
- Greenwheels (NED)
- Stadtmobil (GER)



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)
- MILES (GER)
- Bolt Drive (Baltics, GER, CZE, POL)



Peer-to-peer car sharing (P2P)

In P2P car sharing, the vehicles are typically 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:

- GoMore/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 2026).
- Bolt, a ride-hailing and scooter sharing provider, has gained traction in selected national car sharing markets with its Bolt Drive service.
- 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

Select strong brand examples from hundreds of operators across Europe



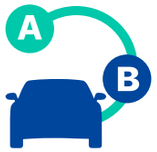
129,000 vehicles in station-based and free-floating car sharing alone

Same fleet size as in 2025. Industry remains on an all-time high.

Across Europe, we identified more than 129,000 shared vehicles in station-based and free-floating car sharing services. Of these, 65,000 operate in free-floating systems, while another 64,000 belong to station-based fleets. Additional vehicles are active in peer-to-peer and corporate car sharing models (not included in the 129,000 value).

In our previous INVERS Mobility Barometer, ‘European Car Sharing 2025’, we arrived at the same aggregated number of vehicles (129,000) based on available data. This year, fleet development varied across markets: many held steady or expanded, while a few contracted. Overall, the European market remains on an all-time high.

129,000 shared cars



65,000 free-floating cars



64,000 station-based cars

Note: 2025 data from INVERS Mobility Barometer on European Car Sharing 2025 (INVERS 2025).
Fleet size excluding the transcontinental markets of Turkey and Russia.

Top 5 European car sharing markets

Free-floating and station-based car sharing combined



Germany

43,190 vehicles

5.2 cars per 10,000 people



France

13,862 vehicles

2.1 cars per 10,000 people



Italy

8,600 vehicles

1.5 cars per 10,000 people



Netherlands

8,000+ vehicles

4.4 cars per 10,000 people



Belgium

6,219 vehicles

5.3 cars per 10,000 people

Other major markets

(sorted alphabetically)

- Poland
- Spain
- Sweden
- Switzerland
- UK

Sources: We quote the datasets of national car sharing associations where available. Exact sources are: Germany (bcs 2026), France (AAA 2025), Italy (Osservatorio Nazionale Sharing Mobility 2025), Netherlands (own estimate based on public data), Belgium (Way To Go 2026). Overlaps with other car sharing business models may occur, since the cited sources can use varying methods to aggregate national figures. 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 significant market.

Characteristics:

- Leading European car sharing region.
- Germany and France have the largest combined station-based/ free-floating fleet size.
- London saw a strong decline in fleet size, due to the market exit of Zipcar.



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, North Macedonia 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, GreenGo, 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 and Aarhus have free-floating offers.

Western Europe

Europe‘s leading car sharing region

Western Europe includes key car sharing markets such as Germany, France, Belgium, the Netherlands, Switzerland, Austria, the United Kingdom, and Ireland. The region pioneered in global car sharing development and has significantly shaped the European landscape.

All three analyzed business models are widely available (with regional variations). In addition, this region is home to some of the largest free-floating, station-based and peer-to-peer operators.

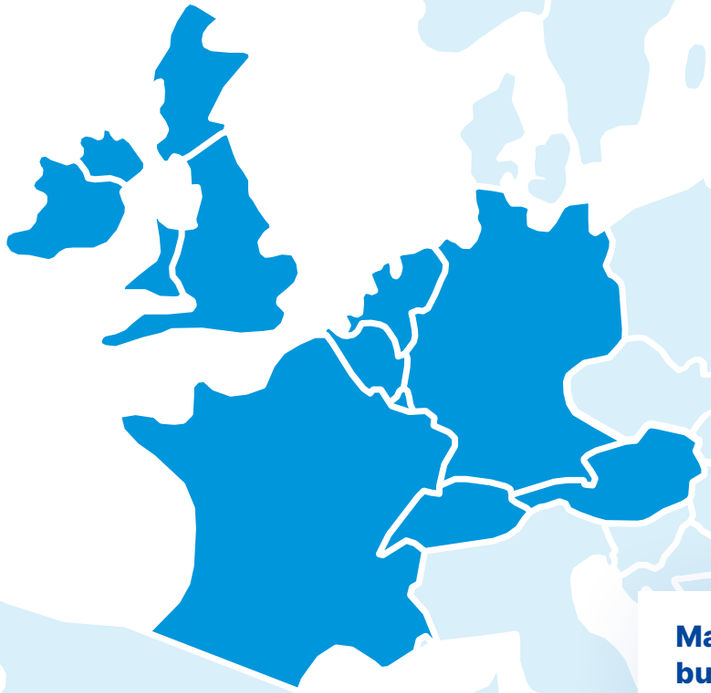
Germany is Europe’s largest car sharing market, and four of Europe’s five strongest markets (see page 13) are in Western Europe. Berlin, Paris, Amsterdam, Brussels and many other cities have thriving car sharing cultures.

Last winter, London saw a strong decline in car sharing fleet size following Zipcar’s exit from the UK market.



Western 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

Andorra
- izi Carsharing

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

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

France
- Agilauto Partage
- citiz
- Clem
- Communauto
- E+Share Drivalia
- Free2move
- Getaround
- marguerite
- Mobilize Share
- modulauto
- LEO&go
- Optymo
- Turo
- Yélomobile

Germany
- Bolt Drive
- book-n-drive
- cambio
- deer
- Flinkster
- Free2move
- Getaround
- Grüne Flotte
- Hertz 24/7
- MILES
- PaulCamper
- scouter
- SnappCar
- SIXT share
- stadtmobil
- Stattauto München
- teilAuto
- YesCapa

Ireland
- Enterprise Car Club
- GoCar
- Hertz 24/7
- YUKÕ

Liechtenstein
- Sponti-Car
- Share Birrer

Luxembourg
- 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

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

Eastern Europe

A hub for free-floating car sharing

In most Eastern European cities with car sharing, free-floating is the dominant business model, followed by peer-to-peer.

Poland is Eastern Europe's largest car sharing market, with a strong free-floating segment (the Polish operator Traficar is being pictured on the right). Although outside the scope of this report, Russia also has a large car sharing market with a strong free-floating focus.

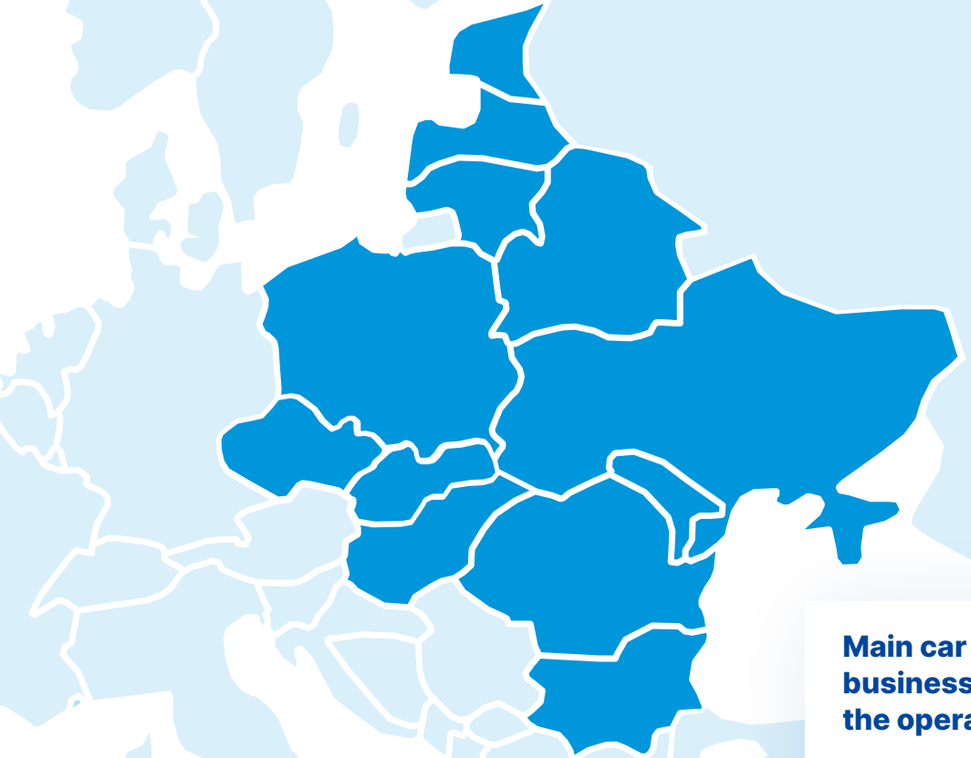
European city states aside, we estimate that the Baltic countries combined have the highest per capita car sharing availability in our report sample (free-floating and station-based combined).

Recent developments include the launch of Bolt Drive in Poland (Warsaw), and AutoGo in Czech Republic (Prague).



Eastern 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

Belarus
- Anytime
- Hello

Bulgaria
- GOeGO
- Spark

Czech Republic
- Anytime
- AutoGo
- Blynkr
- Bolt Drive
- Car4Way
- GoDrive
- Hertz 24/7
- Šárka

Estonia
- Bolt Drive
- Citybee
- Forus Autolevi
- GoMore

Hungary
- Cargo Rental
- GreenGo
- MOL Limo
- Wigo

Latvia
- Bolt Drive
- CarGuru
- Citybee

Lithuania
- Bolt Drive
- Citybee
- Spark

Moldova
- amiGO
- Crupol
- Getmancar

Poland
- Bolt Drive
- Traficar

Romania
- Perpetoo

Slovakia
- Blynkr

Ukraine
- Getmancar

Southern Europe

Italy and Spain have the largest regional fleets

Italy and Spain are the largest car sharing markets in Southern Europe by fleet size. In both countries, free-floating fleets outnumber station-based fleets, and peer-to-peer markets are well-developed. Italy is currently Europe's second-largest free-floating car sharing market, while Spain ranks fourth.

Other markets in the region include Portugal, Slovenia, Croatia, Serbia, North Macedonia, Cyprus and Greece. Cyprus has a high number of car sharing vehicles per capita. Although outside the scope of this report, Turkey also has a well-developed car sharing market, with players such as TikTak and Rentiva.

Key developments include the continued emergence of new markets, such as North Macedonia. In Slovenia, the City of Ljubljana awarded Avant Car a 20-year concession to operate a public electric vehicle rental and sharing system. Other notable events include Zity's withdrawal from Italy and Spain, and the car sharing tender in Milan. Italian operator Enjoy also continued its shift from a free-floating to a station-based model.



Southern Europe

Selected national car sharing operators and platform examples



Albania
- Rentout

Bosnia and Herzegovina
- e-GO Pure Motion

Croatia
- Avant2Go

Cyprus
- RideNow

Greece
- AstyMove
- Caroo
- Goboony

Italy
- Amicar
- Auting
- Carsharing Roma
- Corrente
- E+Share Drivalia
- Elettra
- Enjoy
- Evai
- Free2move
- Goboony
- Playcar
- Pikyrent

Kosovo
- Rentout

Montenegro
- Rentout

North Macedonia
- Avant2Go
- Rentout

Portugal
- Bookycar
- Hertz 24/7
- Yescapa

Slovenia
- Avant2Go
- Share'Ngo

Spain
- Amovens by GoMore
- camplify
- Free2move
- Getaround
- guppy
- Ibilkari
- MEC Carsharing
- Som Mobilitat
- Voltio
- Wible

Serbia
- Anygo

Main car sharing business model of the operator:

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

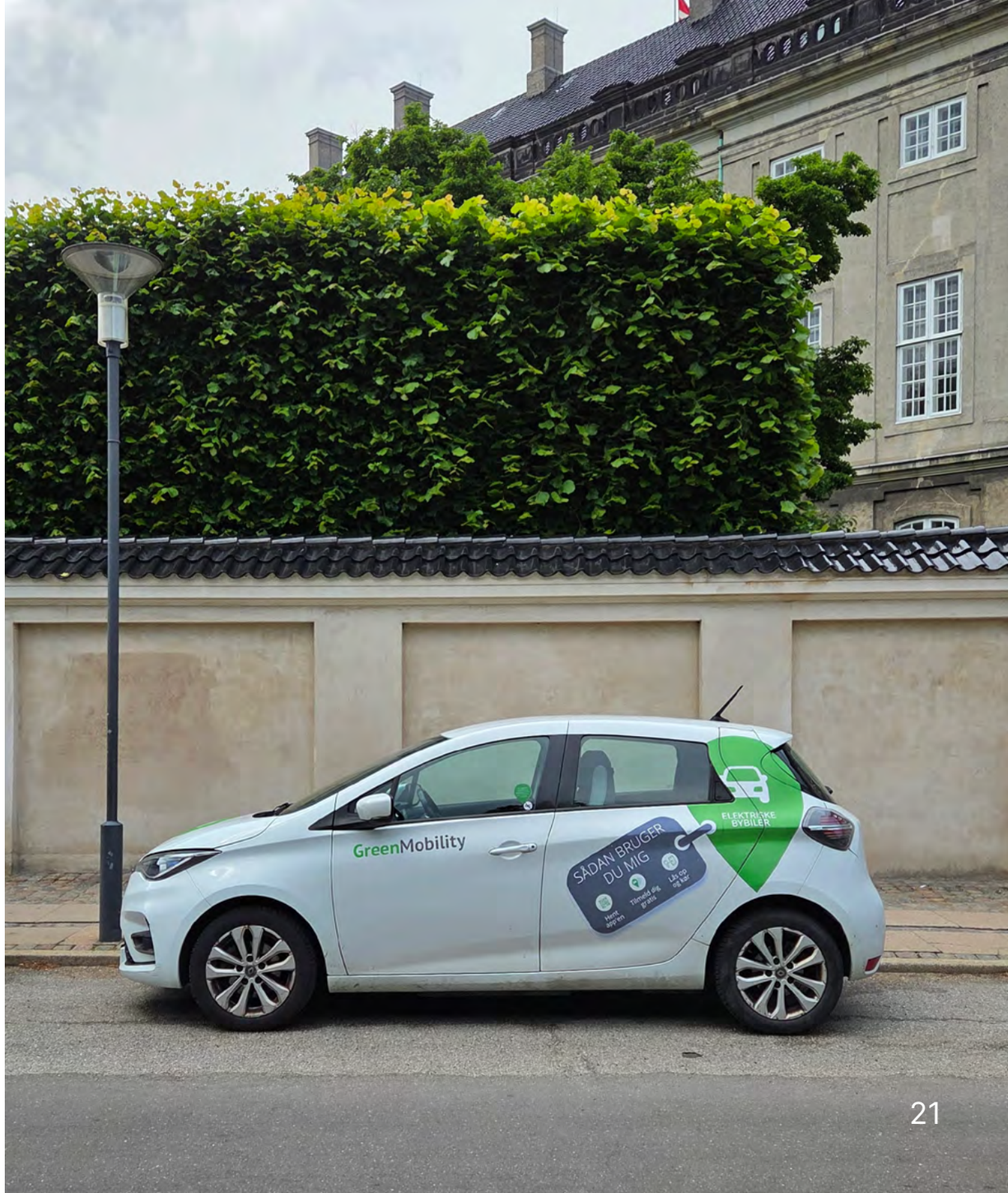
Northern Europe

An established market with a focus on station-based and peer-to-peer

Especially station-based services have traditionally shaped car sharing in Northern Europe. In Norway and Sweden, for example, the model is the backbone of the local car sharing market.

Denmark and Finland are mixed markets. Operators like GreenMobility (Denmark) and Hopp (Iceland) are examples for local free-floating operators. Additionally, all Nordic markets have relevant peer-to-peer operators.

The Nordic countries have strong national brands, some of which operate across multiple markets, including Hyre, KINTO Share and GoMore.



Northern Europe

Selected national car sharing operators and platform examples



Denmark

- GoMore
- GreenMobility
- Hyre
- KINTO Share

Finland

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

Iceland

- Carrenters
- Hopp

Norway

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

Sweden

- Bilpoolen
- GoMore
- Hyre
- Kinto Share
- MyCamper
- OKQ8 Bilpool
- OurGreenCar
- rulla

Selected car sharing news in the past 12 months

Market entries, exits, targets, takeovers, and mergers

NETHERLANDS

Vehicle-to-grid pilot by MyWheels expands

LUXEMBOURG

Brand consolidation. Carloh is integrated into FLEX

FRANCE

Large-scale car sharing tender in Paris region

EUROPE

Announcement that Mutares will acquire Free2move from Stellantis by year-end

ITALY

Milan's call for car sharing operators

NETHERLANDS

Greenwheels and CHECK to join forces

Q4 2025	Q1 2026	Q2 2026	Q3 2026	Q4 2026

UK

Zipcar proposed to exit the British market (later confirmed)

FRANCE

French Transport Minister announces car sharing goals (e.g. 70k cars by 2031)

EUROPE

GoMore and Getaround join forces

SLOVENIA

Avant Car secures license to operate car sharing in Ljubljana

SPAIN & ITALY

Zity withdraws from Madrid, following its exit from Milan EOY 2025

EUROPE

Several operators announced partnerships or pilots with autonomous vehicle technology

POLAND

Bolt Drive expands to Poland (Warsaw)

CZECH REPUBLIC

New operator AutoGo launches in Prague

Where should you look to learn about dense systems?

Four interesting regions with large per capita car sharing availability nationwide (FF and SB combined)



Baltic countries

The Baltic countries Estonia, Latvia and Lithuania are an inspiring example when it comes to car sharing density and availability. Excluding city states, we estimate the combined region has the highest per capita car sharing availability in our European sample (free-floating and station-based combined). Free-floating is the dominant business model. Allowing for some data uncertainty, our figures indicate a combined Baltic car sharing density of at least 10.0 shared cars per 10,000 inhabitants.



Belgium

Belgium has a combined station-based and free-floating per capita car sharing availability of 5.3 vehicles per 10,000 inhabitants. Station-based operators account for two thirds of this figure and free-floating operators for one-third.

Learn more about the Belgian market on page 50.



Germany

Germany is Europe's largest car sharing market by absolute fleet size, with a combined station-based and free-floating availability of 5.2 shared vehicles per 10,000 inhabitants. Its free-floating fleet is larger than its station-based fleet.

Learn more about the German market on page 46.



Netherlands

The Dutch car sharing fleet grew substantially over the last year. The Netherlands now has an estimated combined free-floating and station-based availability of 4.4 shared vehicles per 10,000 inhabitants.

Learn more about the Dutch market on page 49.

Info: The countries listed and their car sharing densities do not represent a European ranking. They represent outstanding examples that are worth looking into.

The urban factor: Car sharing in cities

Car sharing is established infrastructure in large cities and increasingly widespread in smaller communities

At least 85% of analyzed European cities with >300k inhabitants have a station-based and/or free-floating system*

We analysed 123 European cities with at least 300,000 inhabitants and found car sharing available in the vast majority of them.

Analysed cities without a major car sharing operator were mainly located in Eastern Europe and to a lesser extent in Southern Europe.

Most cities with car sharing were served by more than one operator, giving residents more choice and a degree of competition.

Car sharing expands into smaller cities

According to the German car sharing association Bundesverband Carsharing (bcs 2026), 55% of German municipalities with 20,000-50,000 inhabitants have a car sharing system, compared to 92% of the cities with at least 100,000 inhabitants. More than 1,000 German municipalities with fewer than 20,000 inhabitants also have at least one car sharing operator. While car sharing is commonplace in large cities, it is becoming increasingly available in smaller municipalities.



* Without transcontinental markets Turkey and Russia. Population data mostly from Eurostat Urban Audit and selected national sources.

2.1

Station-based car sharing

European market overview

Over 64k station-based 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 has over 64,000 station-based car sharing vehicles operated by at least 470+ operators.* One year ago, we identified 62,000 vehicles for the business model (slight increase). 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).

64k+ vehicles

Estimated SB fleet size (data as of Q2/Q3 2026)*

470+

Estimated number of SB operators (data as of Q2/Q3 2026)*

***Info:** The 64,000+ European station-based car sharing cars are an estimate based on publicly available national association data 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



Germany

18,390 vehicles

2.2 cars per 10,000 people



France

12,655 vehicles

1.9 cars per 10,000 people



Netherlands

7,000+ vehicles

3.8 cars per 10,000 people



Belgium

4,129 vehicles

3.5 cars per 10,000 people



Switzerland

3,831 vehicles

4.3 cars per 10,000 people

Other major markets

(sorted alphabetically)

Austria

Ireland

Norway

Sweden

UK

Sources: We quote the datasets of national car sharing associations where available. Exact sources are: Germany (bcs 2026, includes some hybrid models), France (AAA 2025), Netherlands (own estimate based on public sources), Belgium (Way To Go 2026), Switzerland (CHACOMO 2026). Overlaps with other car sharing business models may occur, since the cited sources can use varying methods to aggregate national figures. 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	HYRE
	GERMANY, BELGIUM	**GERMANY**	**SWITZERLAND**	**NORWAY, SWEDEN, DENMARK**
	With over 250,000 customers and a fleet of several thousand vehicles in 48 German and more than 150 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.	The Swiss cooperative offers its nearly 300,000 customers 3,500 vehicles at 1,800 locations. Already 20 percent of the vehicles are electric cars. According to Mobility, one of its cars replaces 18 private cars, saving space, reducing traffic and protecting the environment. Check out our interview with Corinne Vogel on page 58.	Founded in 2017, Hyre is a leading Nordic car sharing operator with ~3,000 vehicles across Norway, Sweden, and Denmark. Through its 'Car Rental 2.0' model, Hyre now spans downtown, replacement-car and airport segments.
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	Dense Nordic coverage, including remote areas, via replacement-car partners, and strong presence at major airports
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	100+ different models including Skoda Octavia, VW ID3, Renault Trafic, Ford Transit, Volvo XC60, Zeekr 7X, and more
NOTABLE CITIES	Aachen, Antwerp, Berlin, Bremen, Brussels, Düsseldorf, Ghent, Hamburg, Köln	Berlin, Hannover, Karlsruhe, Stuttgart, Trier	Basel, Bern, Genf, Lausanne, Luzern, Zürich	Bergen, Copenhagen, Oslo, Stockholm, Trondheim, Tromsø

Examples of station-based operators (2/3)

Insights into selected operators

	citiz	.GO	Enterprise CarClub	KINTO SHARE
	FRANCE	**SLOVENIA, AUSTRIA, CROATIA, NORTH MACEDONIA**	**UK, IRELAND**	**ACROSS EUROPE**
	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 280 cities with a fleet of nearly 2,800 shared cars.	Avant2Go is a station-based car sharing service in Middle and South East Europe. The company Avant Car is headquartered in Slovenia and recently signed a 20-year concession agreement with the Slovenian capital Ljubljana.	Enterprise Car Club offers on-street car sharing services across the UK and Ireland through a fleet of more than 1,300 vehicles. Backed by Enterprise Mobility, it provides flexible access to vehicles in towns and cities across both markets.	KINTO Mobility, a service from Toyota, operates in various countries across Europe. Sweden and Denmark are examples for their combined KINTO Share and Flex fleets. In Sweden and Denmark alone, they operate 2,200 cars. Check out our interview with Olof Holmgren on page 57.
USP	Focus on France, dense network	Fully electric multi-brand fleet, one app for short and long term rentals	Available in UK and Ireland in many towns and cities	OEM-backed (Toyota)
VEHICLES USED	Renault Twingo, Fiat Panda, Toyota Aygo, Toyota Yaris, Renault Clio, and more	VW ID.3, Peugeot (e-208, e-2008, e-Expert), Renault (5, Twingo, Zoe) BMW i3, Fiat Panda, Smart (ForFour ED, ForTwo ED), etc.	Citroen C3, Vauxhall Corsa, Ford Transit and dozens of additional models	Toyota Yaris, Toyota RAV4, Toyota Proace, Toyota Corolla, Lexus LBX, and more
NOTABLE CITIES	More than 280 cities in France	Ljubljana, Klagenfurt am Wörthersee, Zagreb, Dubrovnik, Skopje	London, Brighton, Cardiff, Dublin, Edinburgh, Leeds, Manchester, Newcastle-Upon-Tyne, and many more	Copenhagen, Gothenburg, Stockholm, and more

Examples of station-based operators (3/3)

Insights into selected operators

	CHECK. greenwheels	mywheels	WienMobil	Hertz 24/7
	NETHERLANDS	**NETHERLANDS**	**AUSTRIA**	**ACROSS EUROPE**
	Greenwheels and CHECK will join forces from 18.11.2026 on. Together, the brands offer cars, scooters, and bikes and reach more than 1.3 million customers in more than 200 municipalities. Greenwheels focusses on car sharing and has a fleet of 3,500 cars. Both companies are owned by PON.	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. Check out our interview with Claire Sipkema on page 55.	WienMobil Auto is a good example of a car sharing operator that is backed by a public transport operator (Wiener Linien). The service is operated in partnership with sharetoo Carsharing. In addition to car sharing, WienMobil also offers bike sharing (WienMobil Rad) and on-demand transport (WienMobil Hüpfer).	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 2,000+ vehicles.
USP	Strong integration with shared micromobility and transit	MyWheels has launched a large-scale vehicle-to-grid (V2G) car sharing system (LINK)	Strong integration into the WienMobil brand and transit by Wiener Linien	Available across many European countries
VEHICLES USED	VW Caddy, VW e-Up!, VW Up!, VW Golf, VW ID3, Skoda Citigo-e, MG 4, and more	Renault 5, Renault Zoe, Citroen C3, Tesla Model 3, Opel Corsa, Hyundai Kona, VW ID3, and more	Cupra Born, Skoda ENYAQ, VW (ID3, ID4, Buzz People, Buzz Cargo)	Ford (Transit, Custom) Opel (Movano, Vivaro, Grandland), Seat Arona, Hyundai i30, Polestar, and more
NOTABLE CITIES	Available in more than 200 cities	All over the Netherlands	Vienna	Numerous cities across Europe. They open locations based on partner networks

2.2

Free-floating car sharing

European market overview

65k+ free-floating 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. 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. Today, free-floating and station-based car sharing are roughly of equal size.

The European market has over 65,000 free-floating car sharing vehicles from up to 80 operators*. One year ago, we identified 67,000 vehicles for the business model (slight decrease).

65k+ vehicles

Estimated FF fleet size (data as of Q2/Q3 2026)*

up to 80

Estimated number of FF operators (data as of Q2/Q3 2026)*

***Info:** The 65,000+ European free-floating car sharing cars are an estimate based on publicly available national association data 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
24,800 vehicles
3.0 cars per 10,000 people



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



Poland
varying estimates
up to 5,500 vehicles
≤1.4 cars per 10,000 people



Spain
3,500+ vehicles
0.7 cars per 10,000 people



Lithuania
2,500-3,000 vehicles
8.8-10.6 cars per 10,000 people

Other major markets
(sorted alphabetically)

- Belgium
- Czech Republic
- Denmark
- Estonia
- Latvia

Sources: We quote the datasets of national car sharing associations where available. Exact sources are: Germany (bcs 2026), Italy (value by Osservatorio Nazionale Sharing Mobility 2025), Poland (own research based on public sources, varying estimates), Spain (AVCE 2026), Lithuania (own estimate). Overlaps with other car sharing business models may occur, since the cited sources can use varying methods to aggregate national figures. 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
	GERMANY	**ACROSS EUROPE**	**GERMANY, NETHERLANDS**	**ACROSS EUROPE**
	MILES, founded in 2016, is the largest free-floating car sharing company in our report. Besides car sharing, they offer car rental and subscription. 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. Check out our interview with Michael Fischer on page 59.	Free2move is one of the key free-floating car sharing operators in Europe. The brand incorporated previous car sharing brands like ShareNow, Car2go, and DriveNow. In 2026, the company is switching ownership: The global automaker Stellantis announced the sale of Free2move to Mutares.	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, car sharing, ride-hailing and car subscription.	Bolt first gained recognition for its ride-hailing and micromobility services before expanding into car sharing. Since launching Bolt Drive in Estonia in 2021, the service has expanded to Latvia, Lithuania, Germany, Czechia and Poland. In 2026, Bolt Drive launched its own fleet in Warsaw. The company continues to invest in technology and operations to make car sharing safer and more convenient.
USP	Largest European free-floating operator, also rental & subscription	Long history of car sharing, large car sharing fleet	Synergies with the SIXT rental division; MaaS app beyond car sharing; well-equipped, high-quality vehicles	Global shared mobility platform that provides ride-hailing, scooter & e-bike sharing, food & grocery delivery, & car rental services
VEHICLES USED	VW (Polo, ID.3), Audi A4, Opel (Corsa, Astra, Vivaro), Cupra Born, Mercedes Sprinter, Toyota Yaris Cross, and more	Fiat 500e, Peugeot e-208, Citroen C3, Opel Corsa, Peugeot 2008, and more	Mercedes-Benz A-Class, Volvo EX30, Volvo EX40, VW Tiguan, Mini Cooper SE, Mini Aceman, Mini Countryman, Jeep Avenger, BMW iX1 and more	Audi Q3, 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, Hamburg, München, Rotterdam, The Hague, and Utrecht	Berlin, Prague, Riga, Tallinn, Vilnius, Warsaw

Examples of free-floating operators (2/3)

Insights into selected operators

	Traficar	Poppy	citybee	GreenMobility
	POLAND	**BELGIUM**	**LITHUANIA, ESTONIA, LATVIA**	**DENMARK**
	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.	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. Today, Poppy also offers car leasing and integrates taxi services into their app.	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, and EVs.	GreenMobility operates a free-floating, all-electric car sharing system with more than 1,500 cars in Denmark. In Copenhagen, it is available since 2016. The company is listed on the Nasdaq Copenhagen Stock Exchange market.
USP	Large number of vehicles	Focus on Belgium. Tele-driving pilot	Large diversity of vehicle models available	100% electric vehicles
VEHICLES USED	Renault Clio, Renault Arkana, Dacia Sandero, Dacia Dokker, Renault Master	Audi A3, Opel Corsa, Skoda Scala, VW Polo, VW Transporter, and more	Ford Focus, Fiat e-500, Renault Master, Skoda Kamiq, Toyota Corolla, VW Tiguan	Renault (Zoe, E-Traffic, Megane E-tech, Kangoo), Polestar, Mercedes eVito, VW ID.Buzz, Peugeot E-partner, Ford E-transit
NOTABLE CITIES	Gdansk, Poznan, Kraków, Warsaw, Wroclaw, and more	Antwerp, Brussels, as well as airports in Antwerp, Brussels, and Charleroi	Kaunas, Riga, Tallinn, Tartu, Vilnius, and more	Aarhus, Copenhagen

Examples of free-floating operators (3/3)

Insights into selected operators

	Wigo	Wible	SPARK	Voltio
	HUNGARY	**SPAIN**	**BULGARIA, LITHUANIA**	**SPAIN**
	Wigo is one of three key Hungarian car sharing operators (the others being GreenGo and MOL Limo). Wigo is owned by car retail and distribution company Auto Wallis Group. Budapest is a thriving European car sharing market.	Wible is a Spanish free-floating car sharing operator in Madrid. They offer 650 KIA's. According to their website, they have 380,000 registered users. The company is backed by KIA and Repsol.	SPARK is a fully electric free-floating service that is available in Bulgaria and Lithuania. The company offers 1,700 electric vehicles, and is one of the largest EV-only fleets in Europe. Check out our interview with Aleksandar Terziyski on page 61.	Voltio, backed by insurance company Mutua, offers 1,000 vehicles in Madrid. According to a February 2025 press release, Voltio users had taken 1.3 million trips since launching in late 2022 (Voltio, 2025).
USP	Mixed fleet with EV and combustion vehicles	Select exclusive parking spots across Madrid	Fully electric free-floating service in Eastern Europe	100% electric vehicles
VEHICLES USED	Renault Clio, Opel Corsa EV, KIA Ceed, Mini Cabrio, BMW X1	KIA Niro, KIA XCeed	Volvo C40 recharge, Audi Q4 e-tron, VW ID.4, Fiat 500e, Renault Zoe, and more	Fiat 500e, Opel Corsa-e
NOTABLE CITIES	Budapest	Madrid	Kaunas, Plovdiv, Sofia, Vilnius	Madrid

2.3

Peer-to-peer car sharing

European market overview

Up to 40 peer-to-peer operators across Europe

Platforms at the intersection between car owners and car sharing users

In peer-to-peer car sharing, vehicles are typically 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, drivemycar, Forus Autolevi, GoMore/Getaround, Hiyacar, Rentout, SnappCar, and Turo. Additionally, brands such as Yescapa/Goboony and Camplify/Paul Camper specialise in campervan and RV sharing.

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

Up to 40

Estimated number of operators (data as of Q2/Q3 2026)*

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

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

Insights into selected operators

	GoMore	getaround	TURO	SnappCar
	ACROSS EUROPE	**ACROSS EUROPE**	**UK, FRANCE**	**NETHERLANDS, GERMANY**
	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, and ridesharing. In 2026, GoMore and Getaround merged, creating an even larger pan-European network.	Founded in 2009, the Getaround brand operates in several markets across Europe including France, Spain, Norway, Belgium, and Germany. The platform provides both manual and digital vehicle handovers. In 2026, GoMore and Getaround merged, creating an even larger pan-European network.	Originally launched in 2009 as RelayRides, Turo has emerged as a major car sharing company globally, claiming 1,600+ unique makes & models on its platform. End of 2024, the company had 1,000+ employees and a large number of guests, hosts and vehicles in their markets.	Founded in 2011, SnappCar has established a strong presence in P2P car sharing in the Netherlands, boasting over 10,000 vehicles on its platform. According to their webpage, over 400,000 users have already used SnappCar.
	Check out our interview with Thomas Christensen on page 56.	Reading tipp: Our 2025 interview with Marie Reboul.		
USP	Expanding brand footprint due to merger with Getaround	Strong customer base in France. Offering 24/7 access with keyless technology	Significant fleet size in France, the UK, as well as North America and Australia	Strong offer in the Netherlands
NOTABLE CITIES	Aarhus, Copenhagen, Madrid, Stockholm, Tallinn	Bergen, Madrid, Marseille, Munich, Lyon, Oslo, Paris	Edinburgh, Lille, London, Lyon, Manchester, Marseille, Paris, and many more	Amsterdam, Berlin, Hamburg, Rotterdam, The Hague, Utrecht

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

Insights into selected operators

	hiyacar	Rentout	2EM	auting share your car
	UK	**MAINLY BALKANS REGION**	**SWITZERLAND**	**ITALY**
	Hiyacar is a British car sharing service that operates with a P2P functionality. Their website states that they offer „affordable vehicle rentals from trusted local owners by the hour or day“.	Rentout is a relatively young P2P operator focusing on South East Europe. It is currently active in markets such as Albania, North Macedonia, Kosovo and Montenegro. The company is a good example that many P2P operators also work together with local car rental agencies.	Founded in 2012, 2EM is an example for the Swiss P2P ecosystem with players like 2EM, GoMore, or drivemycar. 2EM offers a broad spectrum of vehicle types ranging from small cars to transporters.	Auting is an Italian P2P platform operating since 2017. They offer their service with thousands of cars throughout Italy. According to their website, you can rent a car in at least 150 Italian cities.
USP	Keyless "QuickStart" technology for P2P access	Focus on the Balkans	Focus on Switzerland	Focus on Italy
NOTABLE CITIES	London, Manchester, Edinburgh, and more	Tirana, Skopje, Pristina, and more	Available in more than 60 cities and airports in Switzerland	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.



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.



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.

3

National deep-dives

Key insights and takeaways from external studies

Approach

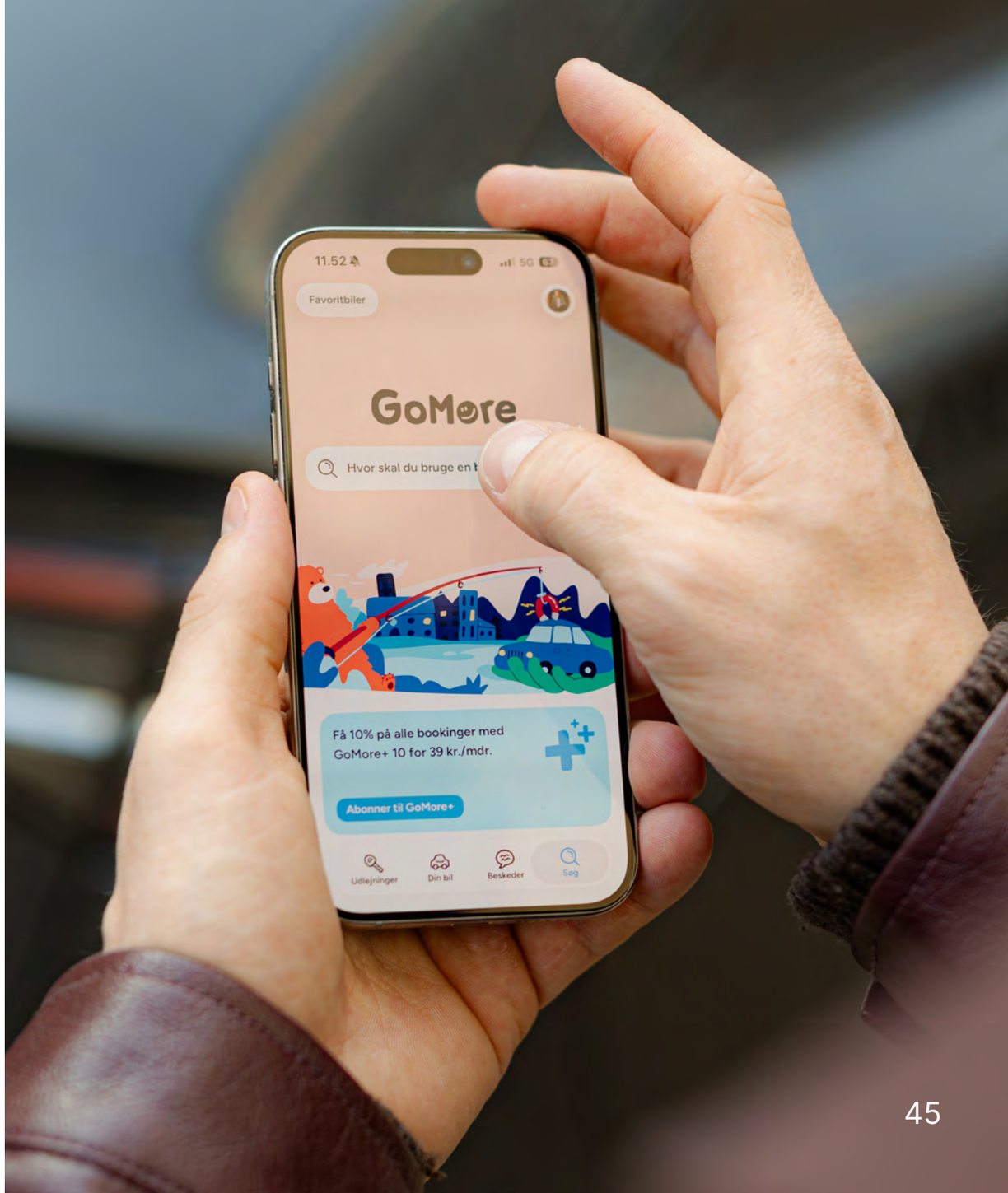
Why and how we conducted the deep-dives

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 2026)

Founded in 1998, Bundesverband Carsharing e.V. (bcs) is the national car sharing association of Germany, Europe's largest car sharing market. With 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 1,490 German municipalities and cities and is provided by more than 290 operators. With its analytical publications, bcs helps to understand the very complex German car sharing market. The latest report was published in early 2026.

FLEET SIZE:
43,190 vehicles in total (-4.9 % YOY)

FREE-FLOATING:
24,800 vehicles

STATION-BASED:
18,390 vehicles in station-based or hybrid systems

WIDESPREAD ACCESS:
1,490 municipalities with a car sharing offer (+7% YOY)

OPERATORS:
293

ELECTRIFICATION:
22.1 % of the fleet in station-based and combined systems is powered by battery electric vehicles (BEVs)

FURTHER READING:
bcs (2026)

„Rising costs of energy cause more households to turn to car sharing. But the number of bookings per household is declining. This poses new challenges to the car sharing business model. Cities and regional states in Germany increasingly promote car sharing because it provides sustainable and affordable car mobility for their citizens."

Gunnar Nehrke
Bundesverband Carsharing

bcs Bundesverband Carsharing

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 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.

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

„The French government has formally recognized the value of car sharing and established a national target of 70,000 shared vehicles by 2031. The challenge now is to translate this ambition into action by aligning public policy, regulation, funding, and local implementation to fully unlock the sector's potential."

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

Association des Acteurs de l'Autopartage

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 about 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, 2025 was a challenging year for the Italian car sharing sector. The next annual report by Osservatorio Nazionale Sharing Mobility will most likely be published EOY 2026.

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.

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

DISTANCE DRIVEN:
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

„In 2025, Italy's car sharing market showed no significant signs of recovery and remains the segment facing the greatest difficulties within vehicle sharing. Milan's new call for car sharing operators, launched in August 2026, could help reverse this trend in one of Italy's most important cities. More broadly, stronger dialogue between local authorities and operators is needed to identify conditions for the economic sustainability and long-term development of car sharing, a key tool for reducing personal car use and ownership, especially in major cities."

Luca Refrigeri
Osservatorio Nazionale Sharing Mobility

Deep-dive 4: Netherlands

Report name: Staat van de deelmobiliteit 2025 (CROW-KpVV 2026)

CROW-KpVV and Natuurlijk!Deelmobiliteit (N!D) with support by Advier published its most recent national report on shared mobility in the Netherlands in February 2026. 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.

For this year's edition of the Dutch report, the methodology for P2P car sharing has changed. On top to keyless P2P cars, manual key handover P2P cars with more than 10 rentals per year have been included by the authors.

Interestingly, the report also includes a national shared mobility user survey with 6,600+ respondents.

FLEET SIZE:
9,450 car sharing vehicles (incl. round-trip, free-floating, community-based, and P2P). Note: New method for P2P this year.

20 COVERED OPERATORS:
The report covers 8 round-trip or free-floating operators, as well as 11 community-based, and 1 P2P operator.

TOP CITIES:
Amsterdam, Utrecht, Rotterdam, The Hague

AMSTERDAM:
The city has the highest offer density in the Netherlands (322 shared cars per 100,000 inhabitants), followed by Utrecht.

FURTHER READING:
CROW-KpVV (2026)

„Car sharing has become a key piece of the urban puzzle. Though the learning curve was steep, cities, developers, and operators are steadily finding their rhythm. With today's housing pressure, unlocking space has never been more urgent."

Arne Brugman
Shared Mobility Expert
Advier

ADVIER

Deep-dive 5: Belgium

Report name: Shared Mobility in Belgium. Report 2025 (Way To Go 2026)

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 newest report covering the situation in 2025 was published in 2026 (Way To Go 2026) and includes many KPIs and user insights. Their annual overviews are a must-read for car sharing number crunchers.

FLEET SIZE:
6,200+ station-based and free-floating cars across Belgium in 2025, plus another 1,400+ private car sharing cars.

EXAMPLE OPERATORS:
Poppy, cambio, Dégage, Getaround, Wibee, Mobilize Share, Battmobility, Cozywheels, and more

5-YEAR DEVELOPMENT:
Car sharing supply has almost doubled in the last five years.

BUSINESS MODELS:
Station-based has the largest fleet, followed by free-floating and P2P.

FURTHER READING:
Way To Go (2026)

„As car sharing grows in Belgium, our ambition must go beyond larger fleets. Success means more people being able to live well without owning a car, with affordable mobility and more space for people in our towns and cities.“

Jeffrey Matthijs
Director of
Way To Go

Selected other national deep-dive reports

Beyond the Top 5 markets, several other key markets are covered by external data sources and are worth a full read

PUBLISHER	AVCE Asociación Vehículo Compartido España	CoMoUK supporting shared transport	CHACOMO	AČC Asociace českého carsharingu
REPORT NAME	Barómetro del carsharing 2026 (AVCE 2026)	Annual Car Club Report (CoMoUK 2026)	Zahlen & Fakten zum Shared Mobility Markt Schweiz. Car Sharing Dashboard (CHACO-MO 2026)	AČC website (AČC 2026)
AUTHOR DETAILS	The Association of Shared Vehicles in Spain (Asociación de Vehículo Compartido España, AVCE) was founded in 2020 and represents key Spanish car sharing operators.	CoMoUK is the UK organization for shared transport, a charity (NGO) dedicated to its social, economic and environmental benefits. Its latest full annual car sharing report was published in mid-2026.	CHACOMO (Swiss Alliance for Collaborative Mobility) represents Switzerland's shared mobility sector. Its car sharing dashboard is the leading national source for car sharing data.	The Czech car sharing association Asociace českého carsharingu (AČC) publishes aggregated national statistics based on member data. Together with operators outside the association, the Czech Republic is one of Europe's key car sharing markets.
DATA HIGHLIGHTS	• The latest report covered 3,664 cars in free-floating and station-based car sharing (AVCE members only) • Example operators: Free2Move, guppy, Voltio, and Wible • AVCE members have a total of 1.8 million registered users. • 81.3% of the fleet are EVs (BEV), followed by 18.7% plug in hybrids.	• 4,263 publicly accessible car sharing cars (before Zipcar exit) • 337,000+ active members as of September 2025 • 28% of publicly accessible car club cars are EVs • Main business model: station-based car sharing • **Note:** Zipcar left the market after data collection for the annual report. CoMoUK estimates a decreased London-fleet of around 90%. Read more here	• 3,831 station-based cars • Another 6,500+ P2P cars covered • More than 406,000 registered users of station-based car sharing + another 140,000 P2P users • 1.3 million trips with B2C car sharing (station-based) • The dashboard covers 7 of 12 B2C car sharing operators and 3 of 4 P2P operators.	• AČC alone represents approx. 2,150 vehicles from its members. In addition, there are more cars from non-member operators. • Car sharing by AČC members is available in 12 cities across the country with Prague as the main hub. • The backbone of the Czech car sharing market is the free-floating model.

Zooming out: Transcontinental markets

Turkey and Russia are not in primary focus of this publication, but hold key fleets

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.

We are pleased that Ersan Öztürk, founder of the Turkish car sharing operator TikTak, gave us an in-depth interview in 2024.

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.



4

Interviews

Talking to experts from European car sharing operators

What do the experts have to say?

We invited experts across the industry to share some of their insights

The Barometer is a collaborative effort. Each year, we invite industry leaders to share insights from their area of car sharing expertise, along with their view of current European trends. For this edition, we spoke with experts from MyWheels, GoMore, KINTO Share, Mobility, MILES, SPARK and Grüne Flotte.

The experts we interviewed operate across many European markets. Their contributions combine data with first-hand observations. The following pages cover topics such as vehicle-to-grid technology, cooperatives, mixed fleets and synergies with leasing fleets, and pan-European operations, among others.

For more local market insights, every edition of the Barometer includes a wide selection of interviews. Last year, for example, we spoke with experts from Hertz 24/7, Bolt Drive, Stadtmobil Stuttgart, Getaround, Omago, cambio and guppy.





Claire Sipkema
COO

MyWheels
Netherlands

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. In 2025, MyWheels has launched a large-scale Vehicle-to-Grid (V2G) pilot.

mywheels.nl

MyWheels is one of the pioneers of vehicle-to-grid technology in the car sharing sector. What needs to happen to roll out this technology across Europe?

MyWheels started with V2G last year, deploying the first 50 V2G vehicles in Utrecht. By the end of this year, that fleet will have grown to 800 vehicles across the Netherlands.

Grid congestion is not a Dutch problem; it is a European challenge. We believe V2G can play an important role in Europe's future energy system, but three things need to happen. First, greater standardisation is needed across vehicles, charging infrastructure, energy systems and grid operators. Second, we need the right regulatory and market frameworks in order to roll-out faster. And third, we need scale. Shared fleets are particularly powerful because they are intensively used and centrally managed. With the right framework and scale (larger) V2G fleets can, besides their mobility function, become a significant distributed energy asset for European cities.

How does MyWheels collaborate with property developers and municipalities to incorporate car sharing into new housing projects from the outset?

We have seen a clear shift in recent years. Initially, we approached developers and municipalities; today, they increasingly come to us, recognising that shared mobility can help address challenges around housing, grid congestion and urban liveability. The key is to integrate car sharing from the very beginning, before parking spaces are designed. We work with developers and municipalities to understand mobility needs and design the right mix of shared cars, public transport, cycling and walking. We can also model how V2G vehicles can contribute to relieving local grid congestion. For developers, this can reduce the need for (expensive) parking infrastructure or can even make a difference in whether a project can be delivered. For municipalities, it creates more liveable neighbourhoods with less traffic and parked cars. Ultimately, we see the shared (V2G) car as part of the infrastructure of every neighbourhood.

Your company implemented a proactive driving score system. What are the typical events that you identify, and how do you interact with customers in the event of repeated misuse?

The goal of our driver scoring system is awareness and prevention, not punishment. We want to identify behaviour that could lead to unsafe driving, damage or a poor experience for the next customer. Depending on the vehicle and data available, we identify events such as harsh acceleration or braking, excessive cornering, speeding, collisions and other unusual driving patterns. We look for repeated patterns, rather than reacting to a single event. In the analysis we only include vehicle and behavioural insights and not customer specific data. Only when we identify potentially problematic behaviour, we then engage with the customer, explain what we have observed and why it matters. Often, awareness is enough to change behaviour. If it continues, we take stronger measures, from warnings and restrictions to, in serious or repeated cases, ending access. The principle is simple: shared cars require shared responsibility.

MyWheels works with so-called 'sleutelfiguren' (ambassadors). What is the role of local vehicle ambassadors, and what impact do they have? How does the ambassador programme work?

Our local ambassadors help make shared cars feel like a natural part of the neighbourhood. They are connected to their community and help others get started with car sharing. They answer practical questions, help with minor issues such as charging problems, report issues and encourage neighbours to try shared mobility.

This local connection is valuable because car sharing is not just a technology platform — it requires behavioural change. People need to understand how it works and trust that a shared car will be available when they need one. The programme also gives us valuable local feedback: where demand is growing, what challenges users experience and what we can improve. 'Sleutelfiguren' are more than an extra pair of hands. They are the bridge between MyWheels and the local community.



Thomas Christensen

COO GoMore Group

GoMore

Across Europe

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, and ridesharing. In 2026, GoMore and Getaround merged, creating an even larger pan-European network.

gomore.dk

The merger of GoMore and Getaround was one of the key stories of 2026. What is the new groups combined footprint?

We are very excited to be joining forces with Getaround following the acquisition we announced in spring 2026. Together, we will become the largest peer-to-peer car sharing operator in Europe, with the ambition of making car sharing available across the continent.

The combined group has a particularly strong footprint in Northern Europe, with leading platforms in Denmark, Norway, Finland, Sweden and Estonia. France is currently the largest market for Getaround and will remain an important market and the largest within the combined group. Together with Belgium, this gives us a strong position in Western Europe.

In Southern Europe, Spain is already a large and fast-growing market where we still see significant potential. And in the DACH region, we have active businesses in Germany, Switzerland and Austria. Overall, the combination gives us a strong presence across most major European regions.

How does the GoMore/Getaround merger impact P2P users across your markets?

Historically, the European peer-to-peer landscape has been fragmented across a number of smaller local players. By joining forces, GoMore and Getaround can use our combined scale to invest further in the user experience and ultimately create a better offering for both car owners and renters.

In markets such as Spain and Austria, where both platforms are active, bringing activity together on one platform can create very tangible benefits.
For owners, more renters can lead to higher utilization of their cars. For renters, a larger supply of cars means more choice and better availability.

Perhaps the biggest long-term benefit is geographical reach. Users will increasingly be able to use a platform they already know and trust when they need a car in other European countries.

What learnings can you share from running a business across 11 markets?

The first learning is that it is not easy. At GoMore, we also had market launches before 2020 that were not successful.

Over the past six years, however, we have found a model that has allowed us to scale organically and build successful and profitable businesses in markets such as Finland, Austria, Sweden and Switzerland.

One of the most important factors is finding the right local leaders. You also need to build a very lean organization, particularly in the early stages. That allows you to concentrate enough resources on reaching the first critical level of scale. Once you have that foundation, you have something much stronger to build on.

How can we further expand P2P car sharing in Europe? What enablers can you think of for the future of P2P car sharing?

We continue to see significant potential for peer-to-peer car sharing across Europe. Fundamentally, our cities are not short of cars. You only have to look around. The challenge is that we need to use the cars that are already there more efficiently.

Asset-based car sharing models typically introduce additional vehicles into cities, and those cars also require parking. With P2P car sharing, we can instead transform cars that are already parked in our neighbourhoods into a shared fleet that can be used by people who do not own a car themselves.
I also think municipalities and other public authorities will increasingly recognize this potential. Today, much of the public support for car sharing is focused on more traditional models. Over time, I expect P2P to become a larger part of that conversation.

But importantly, the future of P2P does not depend entirely on public support. The model is already profitable and growing, and I believe it will continue to expand across Europe.



Olof Holmgren

GM KINTO Share/Flex
Sweden & Denmark

KINTO Share/Flex
Sweden & Denmark

KINTO Mobility, a service from Toyota, operates in various countries across Europe. Sweden and Denmark are examples for their combined KINTO Share and Flex fleets. In Sweden and Denmark alone, they operate 2,200 cars.

kinto-mobility.se

Could you please introduce our readers to your KINTO mobility portfolio in Sweden and Denmark?

KINTO offers a broad mobility portfolio across Sweden and Denmark, covering both short-term and long-term mobility needs. Through KINTO Share, our station-based car sharing service, customers can access vehicles on demand by the hour or day via our app, while KINTO Flex provides flexible subscriptions as an alternative to traditional leasing, with full flexibility and no long-term commitment.

Today, KINTO Share operates more than 2,200 vehicles across Sweden and Denmark, making us one of the largest car sharing operators in the Nordic region. Our vehicles are available in major cities, residential areas, transport hubs, and business districts, providing customers with convenient access to mobility whenever they need it. Our ambition is simple: to make car ownership optional by offering a flexible, reliable, and sustainable alternative.

What are the main advantages of providing different mobility services under one brand in your markets?

Customers have different mobility needs at different stages of life, and these needs can change over time. By offering both car sharing and flexible subscriptions under the KINTO brand, we can provide a seamless mobility journey rather than a single product. The same applies to seasonal needs. During the summer, some customers need a car for one or two months, while during the winter they may only need a vehicle for a couple of hours at a time.

There are clear synergies between KINTO Share and KINTO Flex. Some customers use car sharing occasionally and later move to a subscription model, while others combine the services depending on their lifestyle or business needs. Operating multiple services under one brand also allows us to leverage technology, customer insights, and operational expertise, creating better customer experiences and stronger economies of scale. We also utilise the same fleet for both services. When demand for subscriptions increases, we can allocate more vehicles to KINTO Flex, and vice versa.

How would you describe the current state of the car sharing sector in Sweden and Denmark, and what recent developments have there been?

The car sharing market in both Sweden and Denmark continues to mature, driven by urbanisation, changing consumer behaviour, and an increasing focus on sustainable mobility. More people are recognising that access is often more valuable than ownership, particularly in urban areas where parking costs, congestion, and the overall cost of car ownership continue to increase.

At the same time, we see growing interest from municipalities, property developers, and corporate customers, who view shared mobility as an important part of creating more sustainable and livable cities. In Sweden and Denmark, car sharing is increasingly being integrated into new residential developments and mobility hubs, helping to reduce the need for private car ownership and free up valuable urban space.

Recent developments include increased electrification, improved digital customer experiences, and stronger integration with public transport and other mobility services. We believe these trends will continue to accelerate as cities invest in smarter mobility solutions and consumers increasingly embrace flexible alternatives to traditional car ownership.

Which car sharing innovation will have become standard in 10 years' time?

In ten years, I believe the biggest innovation will not be a single technology, but the seamless integration of mobility into people's everyday lives. Car sharing will be a natural part of a connected mobility ecosystem, where customers can effortlessly combine public transport, shared cars, micromobility, and other mobility services through a single digital platform.

AI will play a key role in optimising vehicle availability, fleet placement, and pricing in real time, ensuring that the right vehicle is available at the right place and at the right time. At the same time, electrification will continue to accelerate, making shared mobility even more sustainable. Ultimately, the customer experience will become almost frictionless, with mobility available on demand whenever and wherever it is needed.



Corinne Vogel
CEO

Mobility
Switzerland

The Swiss cooperative offers its nearly 300,000 customers 3,500 vehicles at 1,800 locations. Already 20 percent of the vehicles are electric cars. According to Mobility, one of its cars replaces 18 private cars, saving space, reducing traffic and protecting the environment.

mobility.ch

What criteria would you use to define the perfect Mobility car sharing parking space? How long does it take to turn an idea for a new station into a live parking space?

Our locations are at the heart of our car sharing offer, and as a tenant, we rely on suitable car parks. These must be accessible 24 hours a day, be of sufficient size and well-organised. Ideally, they should be located in densely populated neighbourhoods close to public transport. As our cars are unlocked via an app, it is important to have at least 4G coverage. If the parking space already has a charging point, that's an advantage. After all, the number of electric cars in our fleet is rising steadily, and installing a charging point takes several months on average. By contrast, a location with a fossil-fuelled car is, on average, operational after four weeks.

What were the reasons for including microcars in your car sharing fleet? Can you already share first impressions from the Microlino pilot?

With this pilot scheme in the city of Zurich, Mobility aims to find out whether microcars meet a genuine need amongst its customers and whether they prove their worth in day-to-day car sharing. Our users often only need the car for a few hours and for short journeys. The Microlino is therefore likely to be the ideal vehicle for many different applications. In any case, the microcars were used extensively during the first few months. Surveys show that many customers have made a booking out of curiosity. To find out more about microcars in the context of car sharing, the pilot scheme is being extended to further locations. We also continuously analyse users' riding behaviour and collect feedback.

How do you leverage synergies with public transport operators such as SBB? Could you share data insights on the intersection between public transport and car sharing?

Car sharing is part of modern mobility and can only work in conjunction with a comprehensive and efficient public transport system. That is why Mobility maintains close ties with various providers and organises joint campaigns. Most important, however, is the seamless transition between the different modes of transport – that is, from the train to a shared car. Almost 1,200 of our vehicles are located right next to a railway station. That makes sense, as 92 percent of Mobility users have a public transport season ticket. Furthermore, surveys show that 15 percent of Mobility members use public transport more frequently after logging in for car sharing.

As a key global car sharing cooperative, could you share your impressions of the annual meetings and regular work of the cooperative?

Cooperatives can provide a solution to current challenges. But they don't come to life on their own. Mobility is organised into 19 geographical sections across Switzerland. All members of the cooperative are welcome to attend their respective branch meetings. There, they gain an insight into the company and elect delegates and alternate delegates every two years.

The delegates represent the members at the annual conference of delegates. At this meeting, for example, the annual and sustainability report and annual accounts are approved, decisions are taken on motions relating to the Articles of Association, and the Board of Directors is elected. Delegates may also submit motions and request written information from the administration.

Things get interesting when we move beyond traditional cooperative democracy. Mobility members, for example, take part in focus groups where they help to develop offers, present Mobility at local events and act as coaches on electric car training courses. This last example is a prime illustration of social support aimed at helping people to help themselves, which exists in this form only within cooperatives.



Michael Fischer

Head of Public & Governmental Affairs

MILES

Germany

MILES, founded in 2016, is a key free-floating car sharing company. Besides car sharing, they offer car rental and subscription. 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.

miles-mobility.com

Which product offers does MILES combine? Could you explain the synergies of combining these services?

Our goal is to enable people to meet all their car-related mobility needs without having to own a car. This includes short trips of just a few kilometres as well as rentals lasting several months or years, for example during holidays or at different stages of life. To meet these needs, we offer long-term rentals and car subscriptions. However, at the core of our business is free-floating car sharing, which allows people to rent a car by the minute or hour, even for short distances. In Germany, more than two million users rely on our fleet of around 15,000 vehicles.

Which city characteristics are beneficial for launching a free-floating car sharing system?

In Germany, free-floating car sharing services are typically concentrated in major metropolitan areas and cities with over 500,000 inhabitants. These markets naturally offer the right conditions in terms of trip distances, use cases and overall demand. This has remained largely unchanged over the past 15 years. A few years ago, however, MILES became the only pure free-floating car sharing provider to also focus on smaller cities. At first glance, these locations might appear unsuitable for free-floating car sharing due to their size, population density, public transport networks or people's travel patterns.

Yet, a closer look at the small and medium-sized cities MILES has expanded into in recent years reveals that most are located in North Rhine-Westphalia, Germany's most populous federal state. Along the Rhine, throughout the Ruhr area and across the Bergisches Land region, cities often merge into one another or are located very close together. From a car sharing perspective, these can hardly be viewed as individual cities. Instead, they form one vast, densely populated urban region where people cross city boundaries every day and often need to use a car to do so.

This metropolitan region, home to many millions of people, is therefore unique and ideally suited to free-floating car sharing.

What is your take on autonomous driving in the context of car sharing?

Autonomous driving will likely have a significant impact on how people travel in the future, both within cities and beyond, and consequently on providers' business models. This is also being discussed extensively within our company, and we are exploring every conceivable option to position ourselves effectively. There are certainly differing opinions on what role a car sharing provider can play in this scenario in the future.

Personally, I don't think that autonomous driving will make car sharing obsolete or that we will only see robotaxis. In an autonomous future, the need to access a car for a limited period of time will still exist, whether it is driven by a person or by technology. People probably won't call a robotaxi for specific needs, such as doing a big shop, going on day trips or going on holiday. However, they probably will for journeys to restaurants, train stations or airports. Operating areas could potentially be larger than they are today, as fleet operations and logistics can be managed more intelligently and efficiently. There are still many unknowns here. The only thing that is clear to me is that, in this future, people living in cities will have even less need to own a car than they do today.

As both a MILES user and an employee, what do you love about the brand and its services?

I have always believed that car sharing needs scale and relevance to convince people to live without owning a car. People only change their behaviour if they can be sure of always finding a vehicle whenever they need one. That is why I am glad to have ended up with the provider that has made this approach central to everything it does and that has a visible and measurable impact in cities.



Jonas Schmid

Business Unit
Development & Strategy

Grüne Flotte
Germany

Grüne Flotte offers station-based and free-floating car sharing, car subscription and camper rental with a fleet of more than 600 vehicles. More than 47,000 private users, as well as companies and associations, in more than 13 municipalities and cities use its mobility solutions. The service is available in the Freiburg and Bonn/Rhein-Sieg regions in Germany.

gruene-flotte.com

What makes Grüne Flotte unique?

Grüne Flotte stands out above all for its strong regional roots. In our core areas of Freiburg/ South Baden, as well as Bonn and the Rhein-Sieg region, we offer a dense car sharing network across both urban and rural areas. Our modern fleet ranges from compact cars to larger vehicles to suit a range of mobility needs. We place particular emphasis on simple, everyday-mobility solutions, fair prices and personal, customer-focused service. Our aim is to make car sharing as simple and digital as possible and accessible to a broad range of people – as an attractive alternative to owning a car.

In this context, our new car sharing vehicle designed to carry wheelchairs is also worth highlighting.

How do your station-based and free-floating offers complement each other? Why did you decide to implement a hybrid system?

With our hybrid approach, we aim to cover as wide a range of mobility needs as possible. Station-based car sharing is particularly well suited to planned trips. Customers can reserve a vehicle in advance and choose between different vehicle classes as required. Our free-floating service, “flott”, by contrast, offers maximum flexibility for spontaneous trips. With open-ended bookings, the rental period does not need to be fixed in advance. In addition, straightforward one-way trips are possible within and between our service areas. The two models therefore complement each other ideally: while station-based car sharing offers reliability and a wide choice of vehicles, “flott” provides spontaneity and flexibility in everyday life and on days when demand is high.

How do you manage the operational aspects of running a car sharing system, and how do you decide whether to do things in-house or outsource them?

Our approach is to cover as much of the value chain as possible in-house. In our home region of Freiburg and South Baden, our own employees take care of virtually all operational tasks – from vehicle cleaning and maintenance and repairs to customer service. For digital infrastructure, in particular the booking system and the app, we work with specialised external providers. In more remote service areas such as Bonn, we combine central management with local partners. This structure enables short decision-making paths, high service quality and the flexibility needed to respond to regional requirements.

What role do car subscriptions and campervan rentals play in the Grüne Flotte business model, and how do these services complement traditional car sharing?

Our aim is to offer people in different life situations the mobility solution that suits them. Car sharing is ideal for many everyday trips. There are, however, phases of life – such as when a family grows or someone changes jobs – in which a vehicle is needed for exclusive use over a longer period. This is where our car subscription offers a flexible alternative. Anyone who wants to travel in a campervan can rent one from us instead of buying their own vehicle. What matters most to us is how these services work together: depending on their life situation, our customers should be able to switch easily between car sharing, car subscription and campervan rental. We are continuing to build out this holistic approach to mobility step by step.



Aleksandar Terziyski

Group CEO SPARK Technologies

SPARK

Bulgaria & Lithuania

SPARK is a fully electric free-floating service that is available in Bulgaria and Lithuania. The company offers 1,700 electric vehicles, and is one of the largest EV-only fleets in Europe.

spark.bg

How does car sharing differ in Bulgaria and Lithuania?

Although SPARK runs the same business model under one brand in both markets, the market dynamics are different. Lithuania, while smaller in size, has a more established car sharing culture and a competitive landscape. Bulgaria has a different balance of challenges and opportunities: Sofia is a much larger city, and even without direct car sharing competition, customers have attractive alternatives such as a cheap, well-developed and modern metro network. Cultural differences in how people use the service play a role too. So we have to localise to some extent, but the underlying principle is the same in both markets: sustainable growth that starts with strong teams, solid unit economics and a compelling customer experience.

Lithuania has one of the largest free-floating car sharing fleets in Europe. What makes free-floating so successful in a city like Vilnius?

Vilnius is very well suited for car sharing. It combines a relatively compact urban area, business districts and the airport within close city proximity. And you have three strong competitors there - SPARK, Bolt and Citybee. So, in combination, a free-floating car is rarely more than a few minutes walk away. Distribution matters too: our cars can be reserved in our own app and through Bolt, so more cars of both Bolt and SPARK see demand from two user bases. Together, this create a strong car sharing culture, high vehicle availability per capita and frequent, functional use. More trips mean more data, and more data leads to better vehicle positioning, availability and service quality, which brings more users, and the cycle repeats.

How do you choose the right electric vehicle for your fleet, and what factors should you consider when making this decision?

We are granular about unit economics and look at the whole ownership chain: purchase price, financing cost and expected residual value; insurance and repairs; how often a model is damaged, parts availability and their cost; connectivity with our telematics; real winter range and charging speed; and, often underestimated, how users perceive the car. A cheap car that users find unattractive gets fewer trips and ends up costing more per trip. The car must also fit its use: a compact city car, a comfortable passenger car and a cargo van serve different needs. Every purchase passes clear economic guardrails, and when buying doesn't add up, partners can add cars instead. OEM and dealer quotas for EVs are often a limiting factor too.

What has been your experience of working with insurance companies? What insights can you share about the GoSafe protection programme?

Insurance is a large cost line for us, so we treat it as risk management and work closely with insurers to improve the underlying metrics. That is why we are investing in telematics and damage data, to manage risk better for both us and the insurer. GoSafe is our protection programme for users: for a very small surcharge, they reduce their liability in case of damage. It helps fund repairs, reduces disputes and hopefully creates a better, worry-free customer experience. We look at all of this holistically, together with software features such as driving scores that reward careful driving and reduce avoidable losses.

5 Trends

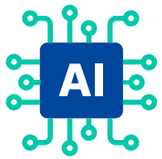
Our Top 5 European car sharing trends

This year, we expanded our trend section. In addition to our internal trend scouting, we invited **130+ European car sharing experts** from across Europe to identify the trends they consider most important. Many answered our call. The experts represent a range of business models and roles, including C-suite executives, founders, general managers, operational specialists, and market observers. They work for **car sharing operators, associations and networks, and industry suppliers**, or are independent consultants.
The most frequently cited trends are:



Top-level trends (1/2)

Key observations of the European car sharing market



AI adoption expands across use cases

Experts frequently cited AI implementation as a key priority for many operators and suppliers.

EXAMPLES:

- Damage management
- Fleet management
- Identity verification
- Smoke detection
- Fraud prevention
- Dynamic pricing
- Conversational analytics and agents



Evolving policy landscape

In 2026, many new political initiatives emerged across several European markets.

EXAMPLES:

- **France:** French Minister of Transport announced a target of 70,000 car sharing vehicles by 2031. LINK
- **France:** The Paris region announced a large-scale car sharing tender. LINK
- **Italy:** Call for car sharing operators in Milan. LINK



Autonomous driving on the roadmap

Select car sharing operators are monitoring and testing (partial) autonomous driving capabilities, and planning pilot schemes. Several announced initiatives in 2026.

EXAMPLES:

- **Denmark:** GreenMobility and WeRide form a strategic partnership for Level 4 autonomous mobility. LINK
- **Netherlands:** MyWheels plans to integrate Tesla Full-Self-Driving (FSD) technology. LINK

Top-level trends (2/2)

Key observations of the European car sharing market

Vehicle-to-grid (V2G) enters the car sharing conversation

Several operators are researching, testing or implementing V2G technology. V2G allows idle electric cars in a car sharing fleet to feed power back into the grid during demand peaks, turning parked vehicles into flexible energy storage.

EXAMPLES:

- **Netherlands:** MyWheels runs V2G. LINK and interview on page 55
- **Belgium:** Mobilize Share is part of a V2G pilot in Ghent. LINK
- **Switzerland:** Mobility has previously conducted V2G research. LINK

Further operators joined forces or merged

Several operators joined forces or merged to expand their market presence and strengthen their operations.

EXAMPLES:

- **Across Europe:** GoMore and Getaround join forces. LINK
- **Netherlands:** CHECK and Greenwheels join forces. LINK
- **Luxembourg:** Carloh was integrated into FLEX. LINK



6

Summary

Main takeaways

Summary (1/2)

Key insights from the report

The aggregated European car sharing fleet remained stable over the past year at 129,000 station-based and free-floating vehicles. The two models are roughly equal in size, with an estimated 65,000 free-floating vehicles and 64,000 station-based vehicles.

The combined station-based and free-floating fleet size is significantly larger than three years ago: it is 23% larger today than in 2023.

Europe is the most diverse car sharing market, with hundreds of brands. At least 470 station-based operators, up to 80 free-floating operators, and up to 40 P2P operators.

We analyzed car sharing systems across 42 countries.

By combined station-based and free-floating fleet, the top five markets are Germany, France, Italy, the Netherlands, and Belgium. Of these, Belgium and Germany have the highest car sharing density, with more than 5 vehicles per 10,000 inhabitants. Some smaller markets such as the Baltic states have even higher car sharing densities.

Several P2P operators have very large fleets. While fleet sizes can be substantial, this report does not specify the total aggregated European fleet size for the P2P segment.



Summary (2/2)

Key insights from the report

Policy matters more than ever. Strong national car sharing associations and networks are essential. In France, the Minister for Transport has announced a target of 70,000 car sharing vehicles by 2031, and the Paris region announced a large-scale car sharing tender. In Italy, Milan calls for new car sharing operators within an evolving policy landscape.

Top level market trends:

- AI adoption is expanding across use cases
- The policy landscape is evolving
- Autonomous driving is on the roadmap
- Vehicle-to-grid (V2G) is entering the car sharing conversation
- Select operators merged or expanded partnerships

Select operator-level news from the past year include:

- New brands or market launches of existing brands like AutoGo (Prague) or Bolt Drive (Warsaw)
- Market exits: Operators like Zipcar (in UK) or Zity (in Milan and Madrid) ended local services
- Partnerships, mergers, and acquisitions: GoMore and Getaround (across Europe), CHECK and Greenwheels (Netherlands), FLEX and Carloh (Luxembourg)
- Stellantis announced agreement to sell Free2move to Mutares until end of year



7

About and Sources

Who is INVERS and reading tips

About INVERS

Who we are

INVERS enables car sharing 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 and Toyota Kinto. The company was founded in 1993 and has locations in Siegen, Cologne and Vancouver. The development takes place in Germany.

www.invers.com

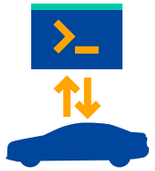
Start and scale your car sharing

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

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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 Car Sharing

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+ 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

Our INVERS Knowledge Hub: Exploring car sharing expertise

Learning about car sharing in all stages



INVERS Academy

The INVERS Academy is a comprehensive, open-access learning resource designed to help entrepreneurs, fleet managers, and city officials master the car sharing industry.

- **Module 1:** Intro to Car Sharing
- **Module 2:** The Business of Car Sharing
- **Module 3:** Choosing Your Tech Stack
- **Module 4:** Launching Your Service
- **Module 5:** Running Your Service
- **Module 6:** Challenges

LEARN IN THE ACADEMY



Tech Compass & Webinars

We share tech-driven solution papers and interactive webinars alike:

Car Sharing Tech Compass:

- Why Telematics Migration Isn't As Hard As You Think. LINK
- The Cost of Missing Data in Car Sharing. LINK
- What Keeps Your Fleet Online When The Network Is Down. LINK

Webinars:

- How Fleets Are Integrating EVs in North America. LINK
- How To Run Effective Telematics Pilots. LINK

EXPLORE OUR TECH LESSONS



INVERS blog

INVERS runs a focused insights blog on all things car sharing and fleet automation. Selected topics:

- From First Car to Full Scale: Infleeting. LINK
- The Hidden Cost of Reactive Maintenance in Car Sharing. LINK
- **Interview:** Gunnar Nehrke from bcs on "Car Sharing and Public Transport". LINK
- **Interview:** Diego Ramirez-Gölz from free-floating operator Bolt Drive. LINK

EXPLORE THE BLOG

Sources & picture credits

Where we got our info & pictures from

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