2026

Arval Mobility Observatory

THE FLEET & MOBILITY INDUSTRY AT A CROSSROAD: FROM AMBITION TO EXECUTION

Insights from the Arval Mobility Observatory Global Fleet and Mobility Barometer 2026.

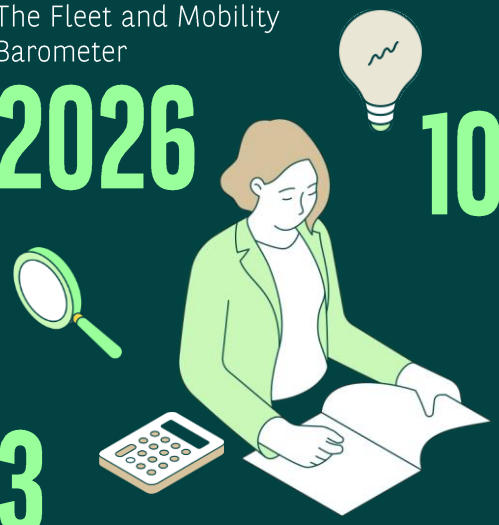
AN INDUSTRY AT CROSSROADS:

Arval Mobility Observatory

A Deep Dive into Key Drivers for Fleet and Mobility Transformation.

The Fleet and Mobility Barometer

2026



10,157 interviews

33 countries

3 main axes of transformation: environmental sustainability, enhanced operational performance, and employee satisfaction.

ENVIRONMENTAL SUSTAINABILITY

66% of companies with passenger cars are using or considering using alternative energy technologies.

45% of companies already including second-hand vehicles in their fleets.

ENHANCED OPERATIONAL PERFORMANCE

40% have adopted telematics, stable overall, led by North America and LATAM, both increasing this year.

44% are looking for innovative solutions that enhance fleet performance management (including TCO).

EMPLOYEE SATISFACTION

94% of companies have implemented at least one mobility policy or solution, or are planning to do so (a 5-point increase).

43% of companies claim that HR related-needs are their main motivation for providing mobility policies and solutions.

CONCLUSION

Three defining factors highlighted by this edition: operational performance as the key transformation driver, regulatory changes bringing uncertainty, notably on electrification, and the scaling of alternative mobility solutions.

THE FLEET & MOBILITY INDUSTRY AT A CROSSROAD: FROM AMBITION TO EXECUTION

Insights from the Arval Mobility Observatory Global Fleet and Mobility Barometer 2026

The 2026 Barometer reveals **a decisive shift from ambition to execution**, as companies **pragmatically optimize electrification**, manage **operational constraints**, and strengthen **employee centric** mobility strategies amid **growing regulatory uncertainty**.

INTRODUCTION

The 2026 Fleet and Mobility Barometer marks a **pivotal transition** for global fleets.

While electrification, sustainability, and operational efficiency remain core priorities, this year's results reveal a significant evolution: **companies are shifting from expansion to optimization.**

With insights from **10,157 decision-makers** across **33 countries**, including an expanded Asia-Pacific scope (New Zealand, Australia, Indonesia, Thailand, and India now constitute a whole new regional benchmark), this truly global edition offers the most contrasted, operationally focused landscape to date.

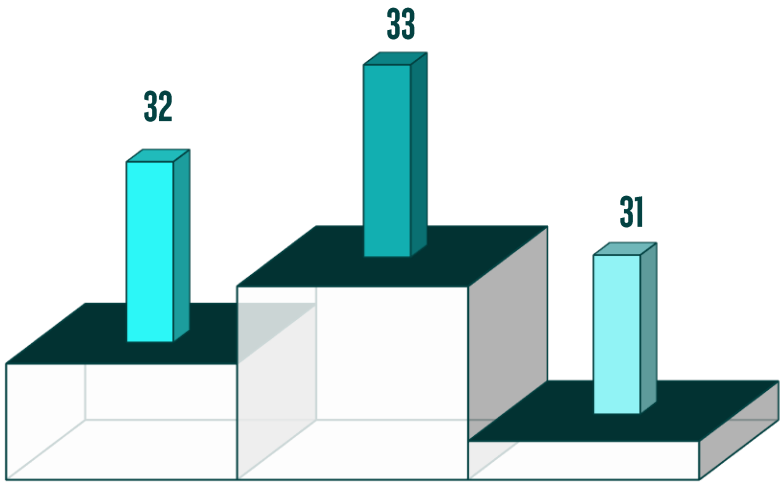
Regulatory developments, including initiatives such as the Clean Corporate Fleet recent proposed Regulation from the EU Commission, remain **key context. However, regulation is just one of many factors that can influence accelerated electrification.**

Fleet managers note that depending on implementation, such regulatory changes may introduce new legal requirements meant for strong acceleration, but operational constraints, financial pressures, and transitional uncertainties remain significant challenges to electrification. Companies therefore adopt more **pragmatic, segmented strategies based on infrastructure maturity, TCO pressures, and operational feasibility.**

TOP CHALLENGES IN FLEET TRANSITION

For 2026
In %

- Adapting to restrictive policies on ICE
- Implementing electrified vehicles in the fleet
- Mitigating the increase of TCO



01/ ON ELECTRIFICATION, CORPORATE FLEETS MOVE FROM AMBITION TO EXECUTION

as 57% adopt EVs in Europe, an additional 19% plan to, and 99% have charging policies. Still, structural barriers persist.

While Europe remains the most mature region, North America, and particularly the United States continues building on the strong electrification shift seen in 2025. Asia-Pacific and Latin America are also advancing, with opportunities ahead.

Passenger cars are moving faster toward electrification than light commercial vehicles, which face operational challenges such as broader usage needs and charging infrastructure constraints. Overall, in 2026, **22% of the companies with LCVs are already using BEV** or are considering doing so in the next 3 years. The reasons behind the acquisition of e-LCVs are mainly related to environmental impact and to reduce fuel expenses.

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

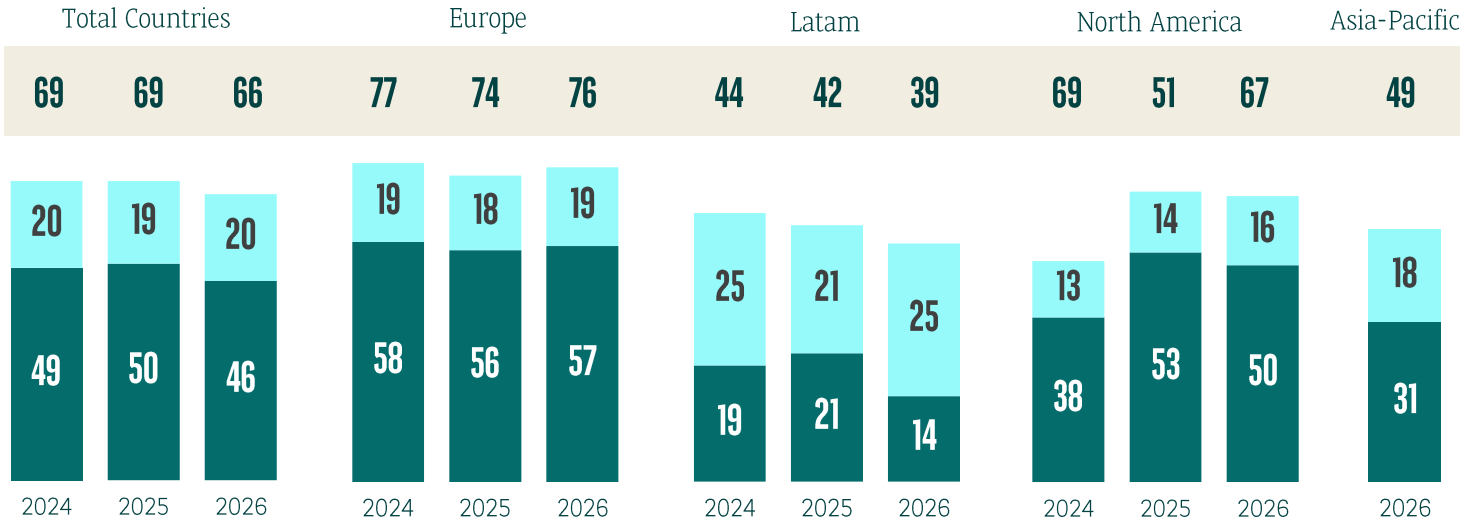
FOCUS ON PASSENGER CARS

For passengers cars
In %

- Already using
- Consider using in the next 3 years
- Total already using & consider using

How to read the results?

66% of the companies with passenger cars, are already using at least one alternative energy technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.

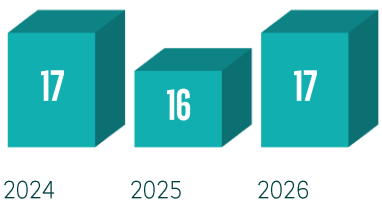


EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

For passengers cars, for all countries
In %

- Battery electric



How to read the results?

17%

of the passenger car fleet, in the next 3 years, is expected to be BEV.

Electrification remains central to corporate fleet strategy, part of their decarbonization ambitions that stay high, but its pace is increasingly shaped by practical constraints.

Asked about the potential impact of a regulation imposing 100% electrification by 2030, **nearly half of the surveyed European companies (48%) state that they would take all necessary measures to comply with such regulations**. At the same time, 46% say they would try to identify an alternative solution, such as transferring mobility choices to employees or offering other mobility options instead of a company car.

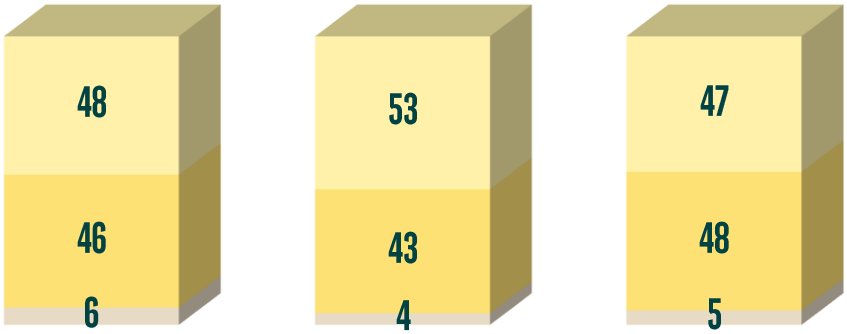
2030 REGULATIONS IMPACT

For passengers cars in 2026
In %

- Take all necessary measures to comply with the regulations
- Transfer the choice of mobility means to your employees by offering them a mobility budget instead of a company car
- Remove all mobility benefits from your compensation package, unless they are mandatory by law

How to read the results?

48% of the companies with passenger cars in Europe in 2026, would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to Battery Electric Vehicle (BEVs) by 2030 at the latest.



The global report shows that most companies acknowledge the obligation to comply, but a similarly large share would actively look for ways to adapt their mobility policies by – amongst others - transferring mobility choices to employees rather than adopt a full electric fleet.

Overall, the main constraint to broader EV adoption remains the lack of charging points, be it public, at home, or in corporate settings, claimed by 68% for passenger cars and 67% for light commercial vehicles (LCVs). It is rather consistent across regions. Other reasons for lack of electrification include the higher purchase price than an ICE car or the limited offer of models for this type of vehicle.

However, companies are actively addressing these issues, and total cost of ownership parity and environmental considerations are driving electrification adoption.

Charging infrastructure, while still a challenge, is rapidly improving. 99% of companies surveyed have implemented or plan to implement a charging policy. **Already, 56% have or will soon have on-site charging facilities.** Public charging is gaining traction, with 67% of companies considering this option, and many offering reimbursement or energy cards to drivers. Home charging is also progressing, with 21% of companies already providing this possibility.

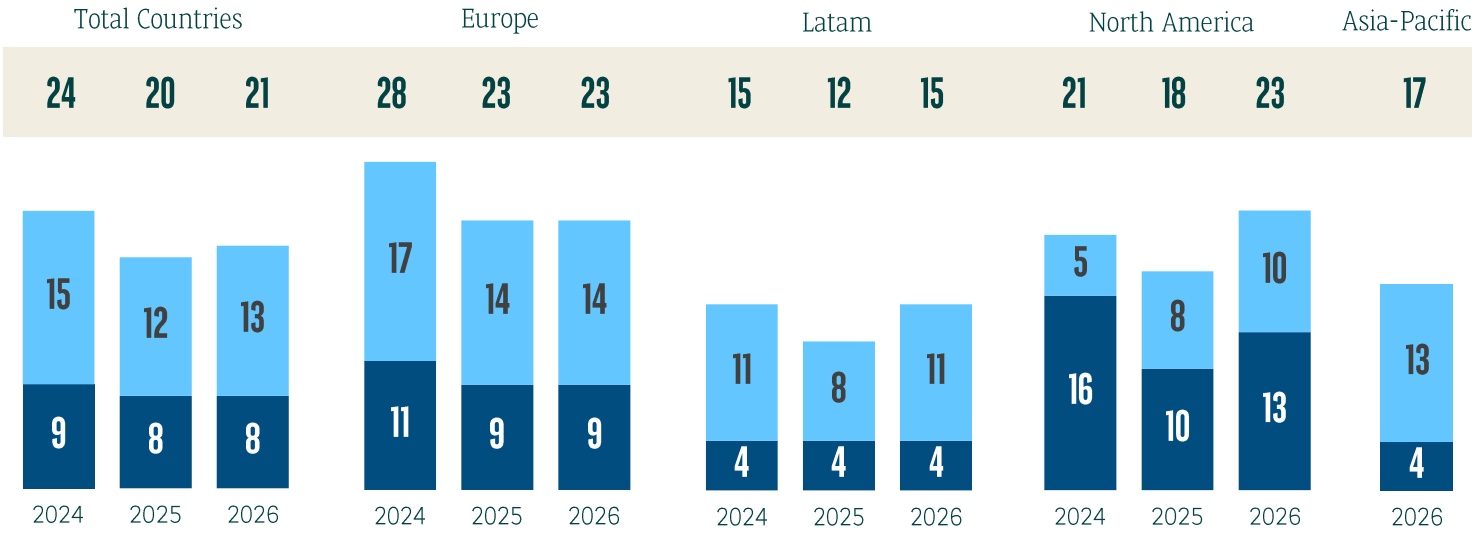
ALTERNATIVE ENERGY USAGE
FOCUS ON LCVs

BEV use for companies with LCVs
In %

- Already using
- Consider using in the next 3 years
- Total already using & consider using

How to read the results?

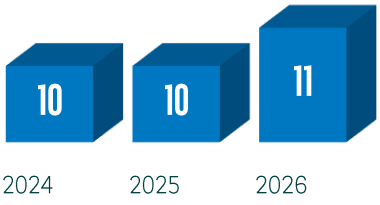
21% of the companies with LCVs in 2026, are already using or are considering using BEV in the next 3 years.



EXPECTED FLEET SHARE PER ENERGY
FOCUS ON LCV FLEET

For LCV fleet, for all countries
In %

- Battery electric



How to read the results?

11%

of the LCV fleet in 3 years, is expected to be BEV.

02/ FLEET CONFIDENCE STAYS HIGH DESPITE VOLATILITY

with growth expected in LATAM and North America and companies relying on used vehicles (29%), sustainability ambitions (26%) and TCO vigilance (31%) to prepare for the future.

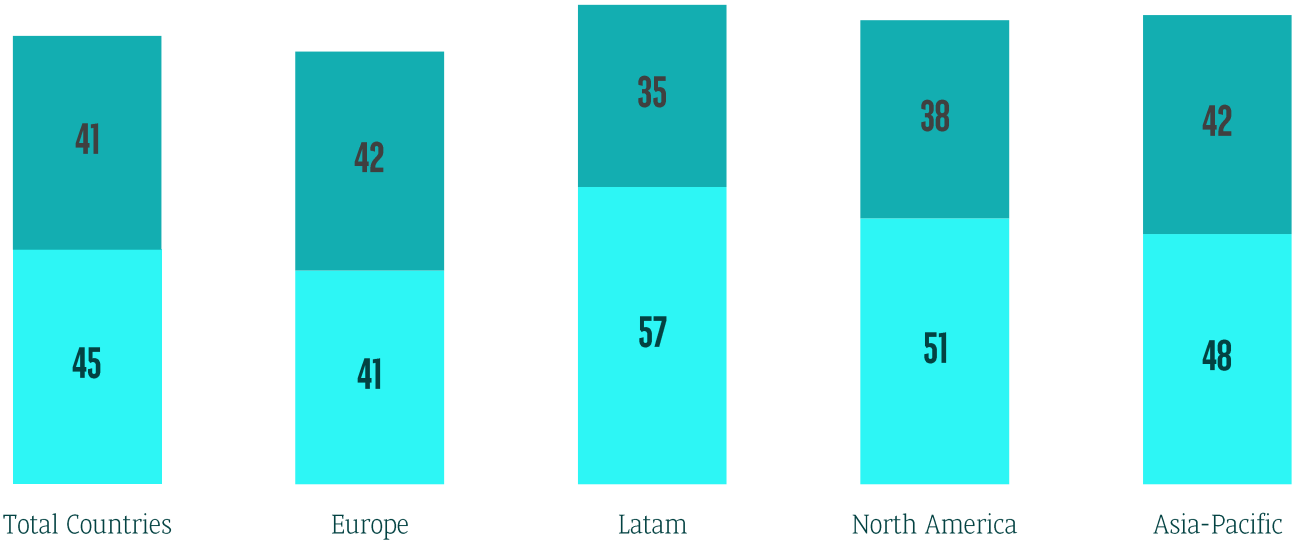
Despite global economic uncertainties, companies remain optimistic about maintaining fleet size over the next three years, with **91% expecting their fleets to either remain stable or grow.**

Used vehicles are emerging as a strategic asset, and leasing is gaining popularity, with 29% of companies already using it as their main financing model to optimize fleet development. Sustainability ambitions are also rising, with 26% planning to integrate decarbonization objectives within three years.

CONSIDERATION OF SECOND-HAND VEHICLES
BY REGION

For passengers cars + LCVs
In %

- Consider including in next 3 years
- Already including
- Use or plan to use operational leasing as their main financing method for second-hand vehicle



TOTAL :	85	83	92	89	90

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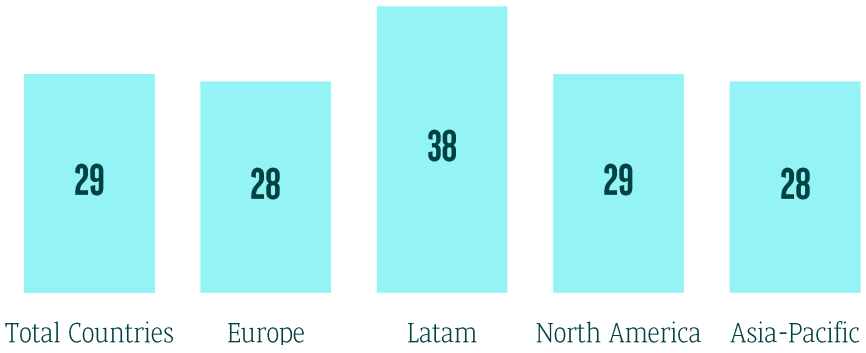
How to read the results?

45%

of companies are already including second-hand vehicles in their fleets



How to read the results?

29%

use or plan to use operational leasing as their main financing method for second-hand vehicles

Managing total cost of ownership remains a priority. For **31% of companies, controlling TCO is the top challenge for the next three years,** particularly in North America and Asia-Pacific, where 45% and 40% respectively identify it as a key focus.

03/ THE FUTURE OF FLEETS IS INTELLIGENCE LED

with 44% demanding data-driven performance tools, of which 18% prioritizing predictive maintenance, even if current data activation remains limited at 17%.

In 2026, fleet managers around the world voiced a clear and unanimous message: **they need smarter, more connected, and more predictive tools** to navigate an increasingly complex mobility landscape.

The open-ended insights reveal a strong demand **for data-driven fleet performance management**, led by automated vehicle monitoring and predictive maintenance, which alone is cited by nearly one in five respondents. Real-time visibility—of vehicles, drivers, routes, and deliveries—emerges as another dominant expectation, highlighting a growing need for **end-to-end operational control and transparency.**

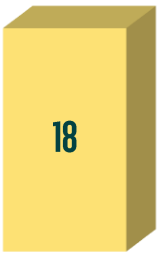
From optimizing routes to preventing breakdowns before they occur, fleet managers are asking for solutions that simplify daily operations, reduce risks, and enhance efficiency. Beyond technology, they express a desire for **all-in-one platforms** capable of integrating the multitude of tasks they manage today.

This year's Barometer signals a pivotal shift: fleets are no longer seeking standalone tools, but **intelligent ecosystems** that empower decision making, unlock productivity, and futureproof mobility strategies.

FLEET MANAGEMENT NEEDS

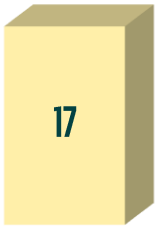
For fleet managers in 2026
In %

- Automated vehicle performance monitoring and predictive maintenance
- Vehicle real-time tracking and monitoring
- Route and delivery optimization



« Integrating advanced monitoring systems for predictive vehicle maintenance which can detect anomalies early and reduce the risk of failures. » (Romania)

« A system that monitors the condition of vehicles and sends notifications about maintenance deadlines to avoid sudden failures. » (Finland)



« A system is needed to track vehicles and monitor materials transported along the way. » (Czech Republic)

« What would really help is having a real-time tracking system for your shipments so that we can be sure of on-time delivery. » (Thailand)

« An application that tracks vehicles and technicians in real time. » (Chile)

« Using digital tools to plan routes and deliveries, avoiding overlaps and delays during the day. » (Australia)

« I could use AI-powered software to optimize routes and minimise travel time. » (Italy)

« Having a system that tracks vehicles while they are on the road would help me to better coordinate orders and deliveries. » (New Zealand)

44%

of fleet managers claim they would need help in terms of fleet performance management

04/ FIRMS ARE MOVING BEYOND CARS TOWARD INCREASINGLY DIVERSIFIED OPTIONS

with 94% of companies now embracing mobility solutions, from car-sharing (26%), to Mobility Budget (30%) and many more.

The 2026 Barometer clearly shows a strong willingness to adopt diversified mobility solutions for employees. Cars are no longer the only means of transportation. **94% of the companies surveyed have already implemented or are planning to implement at least one mobility solution or policy.** This represents a 5-point increase compared to the previous year. For 43% of these companies, the reason for implementing such solutions is linked to HR-related topics.

Among the mobility solutions offered, ride sharing/carpooling is already in place or expected to be within the next three years **for 26% of companies**, along with car-sharing solutions, which are gaining increasing popularity. After decreasing in 2025, the level of private lease/salary sacrifice has returned to its level from two years ago: already implemented or considered by **25% of companies**. Mobility budget and Personal vehicle expense reimbursement are also more widespread in 2026: 30% (a 1-point increase) and 22% (a 4-point increase) respectively.

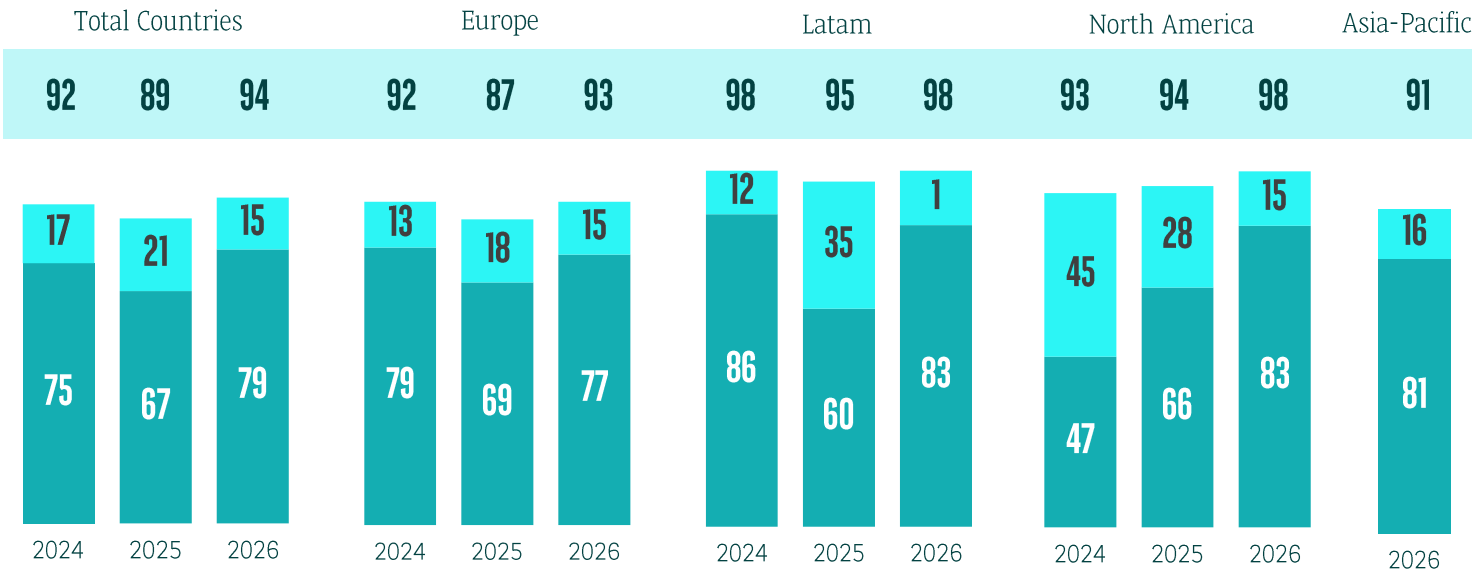
MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

In %

How to read the results?

94% of the companies in 2026, are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



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MOBILITY SOLUTIONS & POLICIES
IMPLEMENTATION PODIUM

For all countries in 2026, in %

Mobility policies

- Public transport expense reimbursement
- Car or cash allowance
- Mobility budget

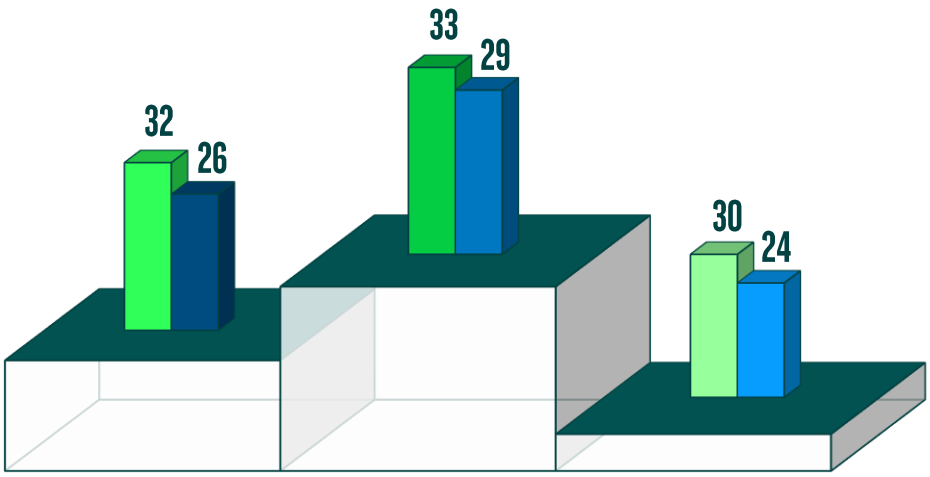
Mobility solutions

- Car sharing
- Ride sharing
- An app provided by the company to book multiple mobility solutions

How to read the results?

33% of the companies in 2026, are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

26% of the companies in 2026, are already using Car sharing or are considering doing so in the next 3 years.



At least one mobility policy:
83

At least one mobility solution:
72

CONCLUSION

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The 2026 Global Fleet and Mobility Barometer reveals an encouraging picture of a sector ready to embrace transformation. Companies are committed to electrification, sustainability, and cost optimization, while actively preparing for regulatory changes and new mobility models. With confidence in fleet stability and a willingness to innovate, businesses are paving the way for a future that combines environmental responsibility, financial efficiency, and operational excellence. The coming years will be defined by progress, adaptability, and a shared ambition to build smarter, greener mobility solutions.

Compared with 2025—when fleet growth and electrification ambitions dominated—2026 marks a shift toward consolidation and execution. Companies have defined their strategies; now they seek to make them operationally viable, efficient, and resilient.

This edition stands apart for three reasons:

- ✓ Operational performance becomes the primary transformation driver.
- ✓ Regulatory change introduces uncertainty, especially concerning electrification.
- ✓ Alternative Mobility solutions are now deployed at scale or, at the very least, considered by the companies surveyed

The coming years will be shaped not by the scale of ambition but by the ability to execute combining environmental responsibility, financial discipline, and technological capability.

"The Fleet and Mobility Barometer 2026 captures a sector entering a new phase: fleets are shifting from ambition to execution. Electrification, overall sustainability goals and efficiency remain essential, but companies now navigate a reality shaped by regulatory uncertainty, charging infrastructure challenges and rising operational pressures. Strategies become more pragmatic as organizations balance environmental objectives with financial discipline and day-to-day feasibility.

At the same time, expectations around performance accelerate. Fleet managers call for smarter, more connected, and more predictive ecosystems capable of providing real-time visibility and simplifying operational complexity. Mobility is also transforming, with companies moving well beyond the car and embracing alternative solutions that support flexibility, HR needs, and new ways of working.

In 2026, the story is clear: success depends less on the scale of ambition and more on the ability to execute—with intelligence, agility, and resilience."

Caroline Pélissier
Head of Arval Mobility Observatory
email : caroline.pelissier@arval.com

mobility-observatory.arval.com

METHODOLOGY

2025/2026

Arval Mobility Observatory

For this independent survey, 10,157 interviews of company decision-makers were conducted between August 25, 2025, and November 12, 2025, by an independent research firm, Ipsos. The participants were recruited and interviewed by phone. The study covers 33 countries: Austria, Germany, Belgium, Spain, France, Greece, Italy, Luxembourg, Netherlands, Poland, Portugal, United Kingdom, Czech Republic, Slovakia, Romania, Switzerland, Finland, Denmark, Norway, Sweden, Mexico, Canada, United States, Turkey, Morocco, Chile, Peru and Brazil, New Zealand, Australia, Indonesia, Thailand and India. The companies concerned operated at least one vehicle.

The breakdown of respondents was as follows:

54%
were companies with 1 to 99 employees

27%
were companies with 100 to 249/499/999* employees

20%
were companies with 250/500/1000* employees or more

The list of mobility policies tested in the 2026 Barometer was as follows: Public transport cost reimbursement, Personal vehicle cost reimbursement, Mobility budget, Peer-to-peer rental or salary sacrifice, Short- or medium-term rental vehicle, Choice between car or salary.

The list of mobility solutions tested in the 2026 Barometer was as follows: Car sharing, Carpooling, Bike rental, Bike sharing, Scooter or motorcycle rental, An application provided by the company to book several mobility solutions, A card provided by the company to pay for several mobility solutions.

*depending on the market


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