

Europe Vehicle Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Europe Vehicle Rental Market Analysis

The Europe vehicle rental market generated USD 15.92 billion in 2025 and is on track to reach USD 23.14 billion by 2030, expanding at a 7.76% CAGR. The market's growth is underpinned by a rapid shift to digital booking channels, proliferating subscription offers, and accelerating electrification of rental fleets. Operators are investing in user-centric mobile platforms that bundle dynamic pricing, loyalty benefits, and ancillary sales, thereby lifting average transaction values. Electrification is moving from pilot to scale as EU Fit-for-55 targets approach, even though charging infrastructure and residual-value risks remain material. A rebound in Mediterranean tourism has tightened peak-season vehicle supply, while corporate sustainability policies are steering demand toward low-carbon packages.

Europe Vehicle Rental Market Trends and Insights

Surge in Digital-Native Travellers Boosting Online Bookings

Online transactions are growing at an 11.2% annual clip, reshaping the Europe vehicle rental market through dynamic pricing and frictionless mobile journeys. Western Europe's 85%+ smartphone penetration enables real-time comparison, helping digital-first operators secure premium rates and reduce acquisition costs. Digital bookings typically generate 23% higher average receipts thanks to algorithm-driven upselling, prompting legacy brands to accelerate API connectivity and app redesigns. As customer tolerance for opaque pricing falls, transparent digital workflows have become central to brand equity.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

EU Fit-for-55 Mandates Accelerating Fleet Electrification

Zero-emission fleet targets embedded in Fit-for-55 have triggered multiyear capex plans among leading rental groups, many aiming for 50-70% electrification by 2030. Higher upfront costs are partially offset by EU innovation funds and the European Commission's EUR 1 billion automotive action-plan allocation to infrastructure and autonomous pilots. Partnerships such as Arval's vehicle-to-grid build-out, targeting 700,000 charge points, illustrate ecosystem convergence.

Stricter EU Consumer-Protection Rules Inflating Compliance Costs

An EU "mini-sweep" showed only 45% of intermediary sites are fully compliant, compelling operators to overhaul back-end booking engines, standardise insurance disclosures, and eliminate pre-ticked add-ons. Smaller firms face disproportionately higher cost-to-income impacts, accelerating market consolidation but ultimately enhancing consumer confidence.

Other drivers and restraints analyzed in the detailed report include:

Rise of Subscription-Based "Car-as-a-Service" Models / Corporate Sustainability Programmes Favouring Low-Carbon Rentals / Volatile ICE Residual Values Amid Rapid EV Uptake /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The Europe vehicle rental market size tilted heavily toward offline channels in 2024, yet online portals are scaling faster and command 65.20% market share in 2024 as smartphone-enabled users value instant confirmation and transparent pricing. Offline bookings continue to appeal to corporate travel desks and walk-up customers but are losing share each year as web and mobile interfaces mature.

Online platforms is expected to foresee a growth of 11.20% CAGR by 2030 owing to increasingly embed artificial-intelligence engines that synchronise real-time demand with fleet availability, lifting yield and supporting ancillary upsell. Users are expected to rise from 63 million in 2023 to more than 80 million by 2027, illustrating how the Europe vehicle rental market is evolving into a data-driven ecosystem. API partnerships with airlines and OTAs extend reach, while variable pricing smooths peak-season shortages and monetises vehicle scarcity.

On-airport stations accounted for 55.10% market share in 2024 because of captive travellers accept premium pricing. Concession fees, often as high as 12% of gross revenue, reduce margins but guarantee volume. Off-airport outlets, including suburban hubs and delivery-to-door concepts, are forecast to outpace overall Europe vehicle rental market growth, supported by urban congestion charges and consumers' preference for local pickups.

The off-airport segment is expected to register a CAGR of 7.50% by 2030, as it is becoming increasingly strategic for operators seeking to mitigate the high costs associated with airport operations while capturing local demand and corporate accounts that prefer convenient urban locations.

Short-term hires of up to 30 days stayed dominant with 70.25% Market share in 2024 with , mirroring leisure travel and corporate trips. However, the subscription segment is eroding the boundary between rental and leasing, converting fixed-term contracts into rolling monthly agreements that include maintenance, insurance, and sometimes charging. Subscriptions now represent a double-digit share of incremental Europe vehicle rental market demand.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Longer operating leases are also expanding at 38.55% CAGR through 2030 as corporates rethink fleet ownership. Rental companies leverage telematics to manage mileage caps and predictive servicing, ensuring high residual-value recovery while fulfilling clients' flexibility requirements.

The Vehicle Rental Market in Europe Report is Segmented by Booking Type (Offline and Online), Rental Channel (On-Airport and Off-Airport), Rental Duration (Short Term and Long Term), Application Type (Leisure/Tourism and More), Vehicle Class (Economy, Compact, and More), Powertrain (ICE, and More), Service Model (Traditional Car Rental and More), End-User, and Country. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Europcar Mobility Group / Enterprise Holdings Inc. / SIXT SE / Avis Budget Group Inc. / Hertz Global Holdings Inc. / OK Mobility Group / Goldcar Rental S.L. / Auto Europe LLC / Buchbinder Rent-a-Car / BlaBlaCar / Ayvens / Finn Auto GmbH / Leasys S.p.A. / Ubeeqo Carsharing GmbH / Green Motion International / Share Now GmbH / DRIVALIA Car Rental / Dollar Thrifty Automotive Group / National Car Rental / Alamo Rent A Car / ACE Rent A Car /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Surge in digital-native travellers boosting online bookings across Western Europe
 - 4.2.2 EU Fit-for-55 mandates accelerating fleet electrification among rental operators
 - 4.2.3 Rise of subscription-based car-as-a-service models in urban centres
 - 4.2.4 Corporate sustainability programmes favouring low-carbon rental packages
 - 4.2.5 Mediterranean tourism rebound inflating leisure-rental volumes
 - 4.2.6 Rapid expansion of EV charging infrastructure enabling fleet electrification
 - 4.3 Market Restraints
 - 4.3.1 Stricter EU consumer-protection & pricing-transparency rules inflating compliance costs
 - 4.3.2 Volatile ICE residual values amid rapid EV uptake denting fleet ROI
 - 4.3.3 Urban car-sharing & ride-hailing cannibalising intra-city rentals
 - 4.3.4 High EV acquisition costs and charging infrastructure investments straining capital allocation
 - 4.4 Regulatory & Technological Outlook
 - 4.5 Porter's Five Forces

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.5.1 Threat of New Entrants
- 4.5.2 Bargaining Power of Buyers
- 4.5.3 Bargaining Power of Suppliers
- 4.5.4 Threat of Substitutes
- 4.5.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

- 5.1 By Booking Type
 - 5.1.1 Offline
 - 5.1.2 Online
- 5.2 By Rental Channel
 - 5.2.1 On-Airport
 - 5.2.2 Off-Airport
- 5.3 By Rental Duration
 - 5.3.1 Short-Term (up to 30 days)
 - 5.3.2 Long-Term / Operating Lease (over 30 days)
- 5.4 By Application
 - 5.4.1 Leisure / Tourism
 - 5.4.2 Business / Corporate
- 5.5 By Vehicle Class
 - 5.5.1 Economy
 - 5.5.2 Compact
 - 5.5.3 SUVs & Crossovers
 - 5.5.4 Luxury / Premium
 - 5.5.5 Light Commercial Vans & Trucks
- 5.6 By Powertrain
 - 5.6.1 Internal Combustion Engine (ICE)
 - 5.6.2 Hybrid Electric Vehicle (HEV/PHEV)
 - 5.6.3 Battery Electric Vehicle (BEV)
- 5.7 By Service Model
 - 5.7.1 Traditional Car Rental
 - 5.7.2 Vehicle Subscription
 - 5.7.3 Car Sharing
- 5.8 By End-User
 - 5.8.1 Self-Driven
 - 5.8.2 Chauffeur-Driven
 - 5.8.3 Corporate Fleet Outsourcing
- 5.9 By Geography
 - 5.9.1 Germany
 - 5.9.2 United Kingdom
 - 5.9.3 France
 - 5.9.4 Spain
 - 5.9.5 Italy
 - 5.9.6 Netherlands
 - 5.9.7 Nordics (Sweden, Norway, Denmark, Finland)
 - 5.9.8 Rest of Europe

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves (M&A, Partnerships, Fleet Investments)

6.3 Market Share Analysis

6.4 Company Profiles {includes Global-level Overview, Market-level Overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products & Services, Recent Developments}

6.4.1 Europcar Mobility Group

6.4.2 Enterprise Holdings Inc.

6.4.3 SIXT SE

6.4.4 Avis Budget Group Inc.

6.4.5 Hertz Global Holdings Inc.

6.4.6 OK Mobility Group

6.4.7 Goldcar Rental S.L.

6.4.8 Auto Europe LLC

6.4.9 Buchbinder Rent-a-Car

6.4.10 BlaBlaCar

6.4.11 Ayvens

6.4.12 Finn Auto GmbH

6.4.13 Leasys S.p.A.

6.4.14 Ubeeqo Carsharing GmbH

6.4.15 Green Motion International

6.4.16 Share Now GmbH

6.4.17 DRIVALIA Car Rental

6.4.18 Dollar Thrifty Automotive Group

6.4.19 National Car Rental

6.4.20 Alamo Rent A Car

6.4.21 ACE Rent A Car

7 Market Opportunities & Future Outlook

7.1 White-Space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Europe Vehicle Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 100 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

