Car Subscription Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Connected Cars, Software & Cockpit (Automotive & Transportation)

> **Source:** https://www.mordorintelligence.com/industry-reports/car-subscription-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 6.12 billion
Projected Forecast (2031)	USD 6.12 billion
Growth Rate (CAGR)	23.41 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Car Subscription industry](images/chart_2.png)

![Car Subscription Market Size](images/chart_3.png)

![Car Subscription Market Share by Service Provider, 2025](images/chart_4.png)

![Car Subscription Market Share by End User, 2025](images/chart_5.png)

![Car Subscription Market Growth Rate by Region](images/chart_6.png)

![Car Subscription Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2019 - 2031 |
Market Size (2026) | USD 6.12 Billion |
Market Size (2031) | USD 17.52 Billion |
Growth Rate (2026 - 2031) | 23.41 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Car Subscription Market Analysis by Mordor IntelligenceThe car subscription market was valued at USD 4.96 billion in 2025 and is estimated to grow from USD 6.12 billion in 2026 to reach USD 17.52 billion by 2031, at a CAGR of 23.41% during the forecast period (2026-2031). The market is gaining traction as consumers face elevated borrowing costs and prefer a single monthly payment over loan installments, insurance, maintenance costs, and depreciation exposure. OEMs and captive finance arms view car subscriptions as a customer retention channel, as the model keeps the vehicle, service relationship, and data connection within the ecosystem for extended periods. Consequently, the car subscription market is evolving beyond a mobility model into a retail offering that appeals to consumers seeking flexibility, businesses requiring operating-cost visibility, and cities where congestion and usage-based policies make fixed-cost vehicle ownership less attractive. However, providers must maintain fleet utilization and resale management because the market remains sensitive to residual-value fluctuations when electrified fleets expand faster than secondary-market pricing stabilizes across the broader used-vehicle market.

Key Report Takeaways* By service provider, OEM/Captives held 58.10% of revenue in 2025, while mobility providers are set to record the highest projected CAGR at 27.45% through 2031.
* By subscription period, the 6-to-12-month plan accounted for 49.33% of the car subscription market size in 2025, while the 1-to-6-month bracket is forecast to expand at a 30.35% CAGR through 2031.
* By subscription type, single-brand programs held 63.15% of the car subscription market share in 2025, while multi-brand platforms are projected to grow at a 28.23% CAGR through 2031.
* By end user, private users represented 77.24% of revenue in 2025, while the corporate segment is forecast to grow at a 25.01% CAGR through 2031.
* By propulsion type, internal combustion engine (ICE) vehicles accounted for 84.02% of revenue in 2025, while EV propulsion is projected to expand at a 36.04% CAGR through 2031.
* By geography, North America held 40.16% of revenue in 2025, while Asia-Pacific is forecast to expand at a 31.45% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Car Subscription Market*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Preference for Hassle-Free Access	+5.5%	Global	Short term (≤ 2 years)
OEM and Captive Financing	+4.8%	North America and Europe	Medium term (2-4 years)
EV-Specific Depreciation Mitigation	+4.2%	Global	Medium term (2-4 years)
SaaS Platform Proliferation	+3.0%	Global	Short term (≤ 2 years)
White-Label Dealer Platforms	+1.8%	Asia-Pacific, Middle East and Africa, South America	Medium term (2-4 years)
Road-Usage-Pricing Pilots	+1.2%	Europe and North America	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The car subscription market is moderately fragmented, with competition divided among OEM-captive operators, technology-enabled platforms, and independent mobili ty providers rather than dominated by one cross-regional player. Fleet ownership, software, and customer acquisition vary by country. OEM-linked operators integrate vehicles, financing, infrastructure, and brand trust, while others offer multi-brand access and simpler digital journeys. Local operating-model fit matters more than global brand visibility.

SIXT uses SIXT+ as a recurring-revenue offering in its mobility ecosystem, showing how subscriptions increase value alongside rental and car-sharing. Toyota's KINTO reached profitability in Sweden in 2025 while expanding users and fleet scale, and strengthened its Italian position through several new registrations and an electrified mix. DriveItAway and Free2move expanded the United States dealer-led rollout, enabling national reach without requiring every dealer to manage product design and software development [3]"Company News," DriveItAway, driveitaway.com.

Opportunities include corporate fleet subscriptions in Asia-Pacific, multi-brand EV offers in Europe, and dealer-enabled white-label expansion in South America and the Middle East and Africa, where demand is rising despite immature infrastructure, insurance, and fleet finance. Asset exposure remains the risk: volatile fleet resale values can compress margins. Success requires disciplined fleet cycling, pricing, and multiple vehicle revenue streams. Battery-separated EV economics, AI-supported pricing, and dealer software will shape an investable, open, unconcentrated market.

Car Subscription Industry Leaders* Hyundai Motor Company

* Hertz Global Holdings, Inc.

* Volvo Cars

* Toyota Motor Corporation (Kinto)

* Free2Move

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Car Subscription Market Report ScopeThe scope includes segmentation by service provider (OEM/captives, mobility providers, and technology companies), subscription period (1 to 6 months, 6 to 12 months, and more than 12 months), subscription type (single brand (single-brand swap) and multi-brand), end user (private and corporate), and propulsion type (internal-combustion engine (ICE) and electric vehicle (EV). The analysis also covers regional-level segmentation, including North America, South America, Europe, Asia-Pacific, and the Middle East and Africa. Market size and growth forecasts are presented by value in USD.

By Service ProviderOEM/Captives |
Mobility Providers |
Technology Companies |

Segmentation Accordion Item

By GeographyNorth America | United States |
 | Canada |
 | Rest of North America |
South America | Brazil |
 | Argentina |
 | Rest of South America |
Europe | Germany |
 | United Kingdom |

	France
	Spain
	Italy
	Poland
	Russia
	Rest of Europe
Asia-Pacific	China
	India
	Japan
	South Korea
	Australia
	Malaysia
	Rest of Asia-Pacific
Middle East and Africa	United Arab Emirates
	Saudi Arabia
	South Africa
	Rest of Middle East and Africa

Frequently Asked Questions

What is driving growth in car subscription services?

Growth is being supported by simpler monthly pricing, financing pressure on buyers, and rising demand for flexible vehicle access. The category is projected to grow from USD 6.12 billion in 2026 to USD 17.52 billion by 2031 at a 23.41% CAGR.

Which region leads today and which region is growing fastest?

North America led with 40.16% of revenue in 2025. Asia-Pacific is forecast to grow the fastest, with a 31.45% CAGR through 2031.

Which customer group is expanding fastest?

Private users still dominate current demand with 77.24% of 2025 revenue. Corporate customers are growing faster, with a projected 25.01% CAGR as firms shift fleet spending toward operating expenses.

What subscription duration is most important right now?

The 6-to-12-month plan is the current anchor, with 49.33% of 2025 revenue. It balances user flexibility with better fleet utilization for operators.