Press Release

Ayvens Global Mobility Guide 2026: taxation, regulation and cost competitiveness are accelerating fleet electrification worldwide

Paris, 16 November 2026

Following its first release in May 2026, Ayvens has expanded its 2026 Mobility Guide beyond Europe, adding 18 new markets in Asia-Pacific and Americas. Covering 48 countries, this edition gives fleet managers a comprehensive overview of the factors shaping electric mobility worldwide. While electrification continues to advance at different speeds across regions, the report reveals a common trend: taxation, regulation and cost competitiveness are becoming the key drivers of fleet transformation globally.

Key findings from this 2026 global edition:

- 15 of the 48 countries covered in the Mobility Guide are now classified as “Developed", reflecting strong Battery Electric Vehicle (BEV) adoption and favourable market conditions for electrification. These markets are located primarily in Northern and Western Europe, and China. EV maturity remains highly fragmented in Americas, classified as “Emerging”;
- Norway is the most mature market, while emerging leaders such as Thailand, Türkiye and Malaysia are accelerating their transition;
- Taxation and regulation of vehicles are becoming central drivers of fleet electrification across all major regions;
- Total Cost of Ownership (TCO) of Battery Electric Vehicles (BEVs) is now more competitive than Internal Combustion Engine (ICE) in 23 countries.

Electrification is becoming more global, though progress remains uneven

The Ayvens Global Mobility Guide 2026 highlights significant discrepancies in electrification progress across regions. While Northern and Western Europe continue to lead on many

indicators, several markets in Asia-Pacific are rapidly advancing thanks to supportive fiscal frameworks and growing EV adoption.

At the same time, mature automotive markets including Australia, Japan and the United States continue to face challenges linked to affordability, infrastructure deployment and policy uncertainty.

China is included in the Guide for the first time and is classified as a "Developed" EV market, reflecting strong vehicle adoption, extensive charging infrastructure and competitive battery electric vehicle economics.

Taxation and regulation emerge as key levers for fleet transition

The report shows a clear shift in the mechanisms supporting electrification.

Across many countries, direct purchase subsidies are being reduced or phased out. In their place, governments are increasingly relying on fiscal incentives, company-car taxation and regulatory measures to accelerate the transition to lower-emission fleets.

Combined with the lower cost of electricity compared to fuel price, the economics of electrification continue to improve. BEVs now offer a competitive or more favourable total cost of ownership than ICE vehicles in selected vehicle segments (from sub-compact car to mid-size segments) in 23 of the 48 markets covered by the Guide.

Despite declining subsidies, costs continue to fall across most Western European markets, while countries including Türkiye, China, Argentina, Malaysia and Peru already have TCO parity or a cost advantage for BEVs.

For fleet managers, these trends reinforce the importance of adapting electrification strategies to local market conditions. While the direction of travel is increasingly global, taxation frameworks, operating costs and charging availability continue to vary significantly from one market to another.

A more granular view of North America

For the first time, and thanks to its strategic partnership with Wheels, Ayvens has developed dedicated EV maturity methodologies at state level in the United States, and provincial level in Canada, giving fleet managers a more precise understanding of local electrification conditions in North America's highly fragmented regulatory landscape. The new approach reflects significant variations in adoption rates, charging infrastructure and cost competitiveness across individual jurisdictions. We can observe that the EV maturity is really scattered from a state/province to another with California and Québec leading this transition.

Charging infrastructure continues to scale globally

Public charging networks continue to expand rapidly across the world, growing from approximately 2.5 million charging points in 2022 to more than 7 million by the end of 2025.

China remains the global leader in the deployment of charging infrastructure, while Europe continues to demonstrate strong growth in mature markets. Despite this progress, infrastructure density and driver confidence remain uneven across regions.

"The transition to electric vehicles is moving forward, but not at the same pace everywhere. In some markets, such as in Western Europe and China, the business case is already clear; in others, such as Americas and some Eastern European countries, cost and charging infrastructure remain significant barriers. As fleet managers navigate a more complex and fragmented mobility landscape, understanding local market dynamics has become more important than ever," comments **Gavin Eagle, Global Director International Key Accounts at Ayvens**

Notes to editors:

- The Mobility Guide was published in two editions in 2026. The European edition was released in May 2026. Download the 2026 Ayvens Global Mobility Guide
- This edition covers both Europe and the rest of the world. The 48 countries included in the Global Mobility Guide are: Argentina, Australia, Austria, Belgium, Brazil, Bulgaria, Canada, Chile, China, Colombia, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, India, Ireland, Italy, Japan, Latvia, Lithuania, Luxembourg, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Peru, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Thailand, Türkiye, United Kingdom, the United Arab Emirates, Ukraine, the United States and Uruguay.
- The guide assesses EV maturity using five pillars: EV adoption, charging infrastructure, taxation and regulation, BEV versus ICE total cost of ownership, and sustainability of electricity. For the United States and Canada, a dedicated methodology has been developed at state and provincial level. BEV TCO is more competitive in Europe than ICE in 14 countries (13 countries in Mobility Guide 2024 – same scope) based on Q1 2026 quotations from a selection of vehicles from sub-compact car to mid-size segments. We noted a general BEV TCO downward trend in almost all Western EU markets from 2025 whereas most countries no longer grant direct governmental subsidies.

About Ayvens

Ayvens is a leading global sustainable mobility player committed to making life flow better. We've been improving mobility for decades, providing full-service leasing, flexible subscription services, fleet management and multi-mobility solutions to large international corporates, SMEs, professionals and private individuals.

With more than 13,000 employees across 40 countries, Ayvens manages 3.0 million vehicles and one of the world's largest multi-brand EV fleet.

The company is listed on Compartment A of Euronext Paris (ISIN: FR0013258662; Ticker: AYV). Societe Generale Group is Ayvens majority shareholder.

Find out more at **ayvens.com**

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