2026

Arval Mobility Observatory

FLEET TRANSFORMATION:

INTEGRATING USED-CAR LEASING FOR COST EFFICIENCY AND SUSTAINABLE IMPACT.

EXECUTIVE SUMMARY

The European used-car market is experiencing strong momentum, driven by solid demand, rising price levels, and rapid stock turnover across most segments. Used-cars that are three to five years old sell quickly – within 24 days on average – and the EU used-car price index is 15.8% higher than in 2015, thus, offering consumers an attractive pool of assets whose steepest depreciation phase has already passed.

These results are not a coincidence. They're borne of a perfect storm of conditions in the auto market, not least of which are sustainability rules. In December 2025, the European Commission proposed amending the rules to replace the 2035 "100% zero emission cars" requirement with a 90% CO_2 reduction target (alongside greater flexibility in how compliance is measured).

Electrifying fleets alone will not decarbonise the European car park — the real systemic lever lies in fixing the second-life EV market. Today, 75% of all EU vehicle transactions occur in the used-car market, according to a recent ACEA study. The growing volume of used vehicles presents a strong opportunity to build a mature and competitive second-life BEV market. With the right public policy support, depreciation of the vehicle can stabilise and become more predictable, which is key to building consumer trust. Ensuring a well-supported second-life BEV ecosystem will reinforce confidence in this technology, enhance leasing performance, and accelerate the broader electrification transition.

Purchasing used rather than new vehicles has historically provided some relief, but it still places capital and operational risk back onto the fleet. For these reasons, an alternative is now gaining ground: **used-car leasing (UCL).**

Used-car leasing gives access to vehicles that have already absorbed the steepest phase of depreciation and are in high demand across the secondary market, without requiring ownership. As a result, residual-value risk, which is more volatile for used vehicles, sits with the leasing provider rather than the fleet end-user, changing how organisations manage cost exposure across the vehicle's remaining life.

When supported by clear policy and consistent quality standards, fleet owners and individuals can adopt the used-car leasing model and integrate it into both their sustainability plans and broader cost-control efforts. Far from being a mere prediction, Used-Car Leasing is already deeply embedded in individuals and corporate mobility strategies.

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01/ BUYING VS LEASING USED VEHICLES

Below you'll find the key differences between Used-Car Leasing and the direct purchase of used vehicles in terms of cost, risk, operational responsibility, and more.

	Used-car leasing	Used-car purchasing
Upfront cost	Typically no upfront cost, or low down-payment/deposit; cost treated as ongoing operating expense.	High upfront capital required to purchase a vehicle; impacts cash flow and capital expenditure budgets.
Residual-value exposure	RV risk sits with the leasing provider, shielding the fleet from the used-car market and BEV depreciation volatility.	Fleet bears full resale risk, including potential sharp RV drops, especially for BEVs.
Service Maintenance and repair (SMR) predictability	Usually bundled in full-service contracts; predictable SMR costs even for older vehicles.	SMR costs increase with age and are borne by the fleet; unpredictability higher for older assets.
Battery health and warranty	The leasing provider may verify State of Health (SoH), ensuring warranty coverage, and managing battery-related failures.	Fleet managers must assess SoH, verify warranties, and absorb degradation or battery-replacement risk.
Sourcing and lead time	Quick access to refurbished, ready-to-lease stock; reduced reliance on new-vehicle lead times.	Sourcing vehicles is done individually; quality and availability vary and can delay deployment.
Administrative burden	Lower: lifecycle management outsourced; consolidated billing and service coordination.	Higher: Handling procurement, workshop coordination, and remarketing at end of life.
Flexibility	Shorter terms possible; enables low-risk BEV pilots and driver trials.	Ownership locks the fleet into longer utilisation cycles; higher risk if BEV suitability is uncertain.

FROM OWNERSHIP TO LEASING

Used vehicles have traditionally been incorporated through direct purchase, meaning the fleet or the individual owns the asset and manages its full lifecycle, from acquisition to disposal. But among those using or considering used vehicles, the Arval Mobility Observatory Barometer finds that 29% plan to use operational leasing as their main financing method, which is structured differently.

On the private segment, consumers are gravitating toward used vehicles because that market is vastly larger than the new-car sector. This scale creates stronger demand, broader choice, and better opportunities for competitive pricing.

At the same time, households are increasingly drawn to the financial advantages: used cars depreciate more slowly, and their lower purchase price enables leasing providers to offer significantly lower monthly payments compared with new-car contracts. For many drivers, predictable and affordable payments are the core reason to choose leasing over ownership.

Leasing companies supply vehicles aged one to five years under an operational lease that includes:

- ✓ **Documented vehicle history**
- ✓ **Professional refurbishment before delivery**
- ✓ **Defined age and mileage standards**, in line with industry norms
- ✓ **Bundled full-service packages**, including maintenance, tyres, roadside as fuel or charging services

For battery electric vehicles, additional requirements may apply, including:

- ✓ **Battery State of Health certification** at delivery
- ✓ **Defined warranty thresholds**, including remaining manufacturer coverage

MODELS OF USED-CAR LEASING

In used-car leasing, deployment is available across different contractual models, depending on who signs the lease and who carries financial responsibility.

Model	Deployment	Typical Fleet Uses	Responsibility
B2B used-car leasing	Vehicles are leased directly into the corporate fleet under employer control	Company cars, pool vehicles, Corporate Cars, salary-sacrifice schemes (including BEVs)	Employer retains contractual, financial, and operational responsibility
B2B2E used-car leasing	Vehicles are offered to employees under individual lease agreements facilitated by the employer	Voluntary employee leasing, mobility benefit platforms, employee-signed leases on corporate terms	Employee carries contractual and financial responsibility
Retail (B2C) used-car leasing	Vehicles are leased directly to private individuals outside the corporate fleet	Consumer leasing and subscription offers	Private individual signs the contract, pays the lease, and carries full financial and legal responsibility

02/ USED VEHICLES ARE ALREADY PRESENT IN CORPORATE FLEETS

Second-hand vehicles adoption exists across a wide share of European corporate fleets. The Arval Mobility Observatory Barometer shows that 45% of fleets currently include used vehicles, while a further 85% of companies expect to introduce them into their fleet. These findings are consistent across regions.

The same pattern is visible in 60% of light commercial vehicle (LCV) fleets, although adoption levels vary by market. For example, according to the Arval Mobility Observatory Barometer, 55% of LCV fleets in Greece already include used vehicles, with an additional 29% considering their introduction in 2026. In Denmark and Finland, more than a third of fleets already operate used LCVs (35% and 38% in 2026, respectively), and a similar proportion expects to add them (45% and 31%, respectively). Germany shows moderate current use (22%) but strong future intent (43%). France, Italy, Spain, and the UK currently report lower adoption levels, but each shows significant interest in expanding the use of used vehicles over the medium term.

Overall, these figures indicate that resorting to used vehicles is already an established and expanding feature of fleet operations across Europe.

Use Case

Safege Oddział w Polsce, the Polish branch of an international engineering and consultancy group, employs 30–50 collaborators and operates nationwide. With increasing pressure on mobility budgets, the company needed a way to offer vehicles that complied with strict cost brackets while still providing adequate comfort and equipment levels for its employees.

Implemented Approach

The company adopted a used vehicle leasing solution built around a ready to use selection of pre owned cars, available across multiple brands, versions, and equipment levels. A comparative evaluation of all available options was carried out, focusing on cost efficiency and service quality to ensure that each driver could find a vehicle aligned with financial policies.

This approach enabled employees with limited budgets to choose cars that stayed within their allowance while still accessing higher spec or better equipped models than would have been possible with new vehicles.

Results

The shift to used vehicle leasing quickly delivered tangible benefits:

- **27% of the active fleet** was composed of **used lease vehicles**.
- **Employee satisfaction increased** thanks to improved vehicle fit and specifications.
- **The company succeeded in optimizing overall fleet costs** while maintaining operational performance.

Used-car leasing has undeniable advantages for corporate fleets, combining the flexibility and predictability of an all-inclusive leasing model with lower overall costs. When supported by clear standards around vehicle quality, including full-service history, professional refurbishment, and transparent warranty coverage, used-car leasing offers fleets strong value for money without compromising reliability or driver experience.

To deploy Used-Car Leasing successfully, fleets must define their rules upfront, before engaging suppliers or offering vehicles to drivers.

Use Case

Angelini Pharma Polska Sp. z o.o. is the Polish branch of the international, Italian group Angelini Pharma, operating in the pharmaceutical and healthcare sector. The company employs approximately 3,000 employees globally and operates directly in more than 20 countries around the world.

Angelini Pharma's business shows a need for company car rental for various levels starting from logistic cars, medical representatives to the top management fleet.

Implemented Approach

The company adopted releasing as a ready-to-deliver solution with full service for new employees, to keep fleet policy choice available and clear for the whole range of employees. Given that safety is a key priority for Angelini Pharma along with operational efficiency and cost optimization, re-leasing, with short term of delivery but Long term rental service standard, was found as a solution that could deliver those needs.

The company decided to look for a specific make and model with specific criteria for the age and mileage of the vehicle. At the end, it was possible to deliver about 15 used vehicles to the company's fleet.

Results

Change to used vehicle leasing quickly delivered results as below:

- **13% of the active fleet** was composed of **used lease vehicles**.
- **Employee satisfaction increased** thanks to improved vehicle fit and specifications and quick delivery.
- **The company succeeded in optimizing overall fleet costs** while maintaining operational performance.

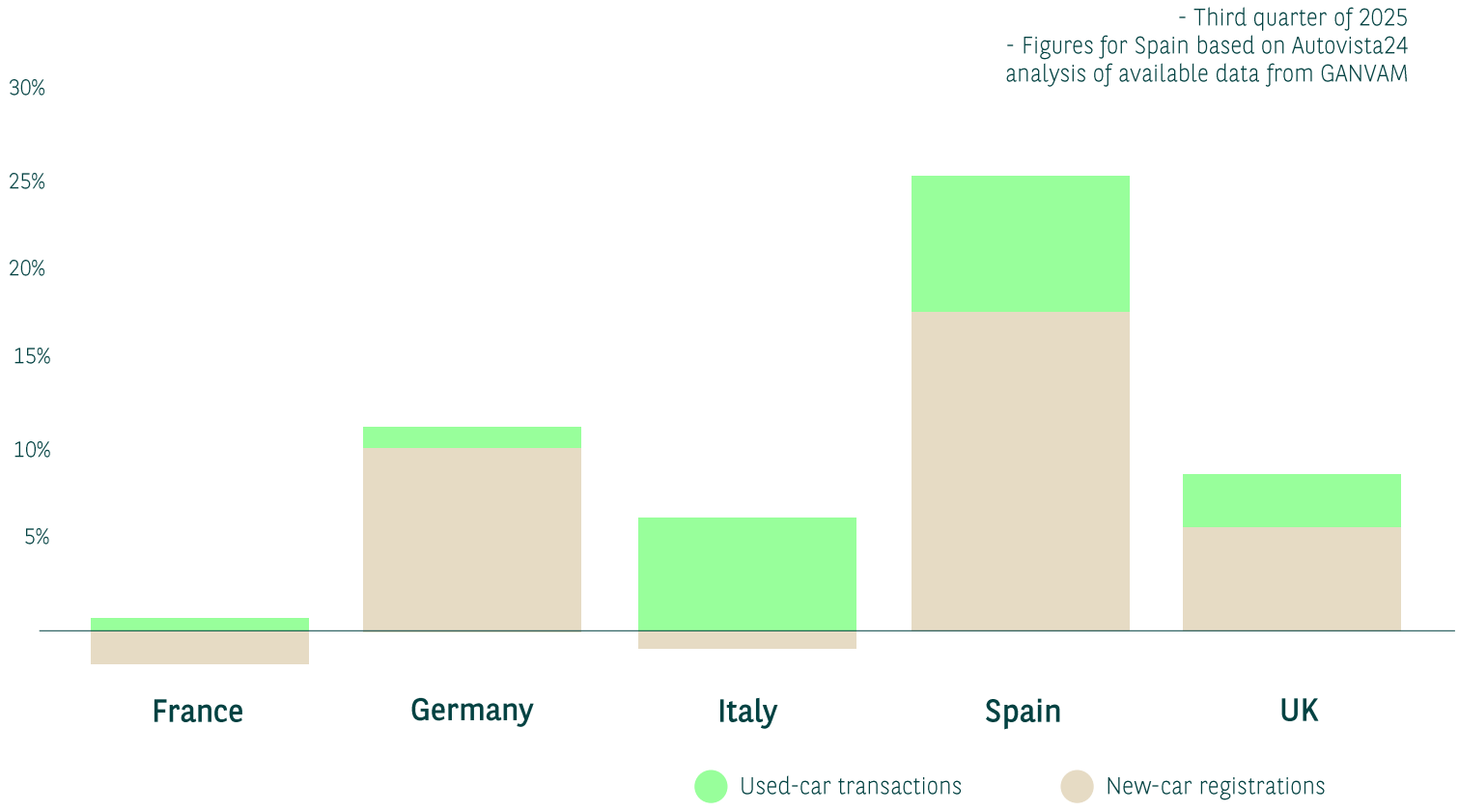
03/ THE EUROPEAN USED-CAR MARKET IS RIPE FOR USED-CAR LEASING

According to ACEA, only 25% of European vehicle transactions concern new vehicles, and new-car registrations represent around 5% of the total automotive market. Moreover, 70–80% of households access a vehicle through the used-car market.

Throughout the first nine months of 2025, used-vehicle transactions were up year-on-year across all five of the continent's largest markets, including Spain, Italy, UK, Germany, and France, reflecting the depth and liquidity of the market. In the third quarter alone, Spain's used-car sales climbed 7.4%, while Italy's grew 6.2%. The UK recorded 2,021,265 transactions over the same period, representing a 2.8% increase, and marking its strongest third quarter since 2021. Even in Germany and France, where growth was more modest, used-car volumes remained higher than in the same period in 2024.

Price inflation has also been building over the past decade. The EU Harmonised Index of Consumer Prices (HICP) for used motor cars reached 115.8 in October 2025, from a baseline of 100 in 2015. Yet, over the same period, new-vehicle prices have increased more sharply, with the HICP for new motor cars reaching 127.4. While used cars are no longer inexpensive in absolute terms, they continue to represent the more accessible segment of the market, particularly for fleets seeking cost control without committing additional capital. The demand for second-hand remains strong across both corporate and consumer channels. Europe's largest used-car marketplaces include *AutoScout24*, which lists around two million vehicles across more than 18 countries and integrates over 48,000 used vehicle leasing options alongside sales listings. Similarly, *mobile.de* hosts over 1.4 million vehicles in Germany and has around 34,850 leasing offers available via its search filters.

Year-on-year percentage changes in used-car transactions and new-car registrations



Source: Autovista

According to BRVLA January 2026 report, the used-car leasing market in the UK is expanding rapidly, fuelled by the sharp rise in second-life electric vehicles.

Used Business Contract Hire volumes grew by +290% year-on-year, reaching 19,644 vehicles, while used LCV leasing jumped by +389%. This surge reflects both a growing supply of returned EVs and leasing companies' increasing confidence in battery durability, allowing vehicles to be leased for 7–8 years before disposal.

Cost remains the main driver: used EV leases can save customers tens or even hundreds of pounds per month compared with new EV offers, making them particularly attractive to small businesses and salary-sacrifice users, a segment where 83% of cars are electric.

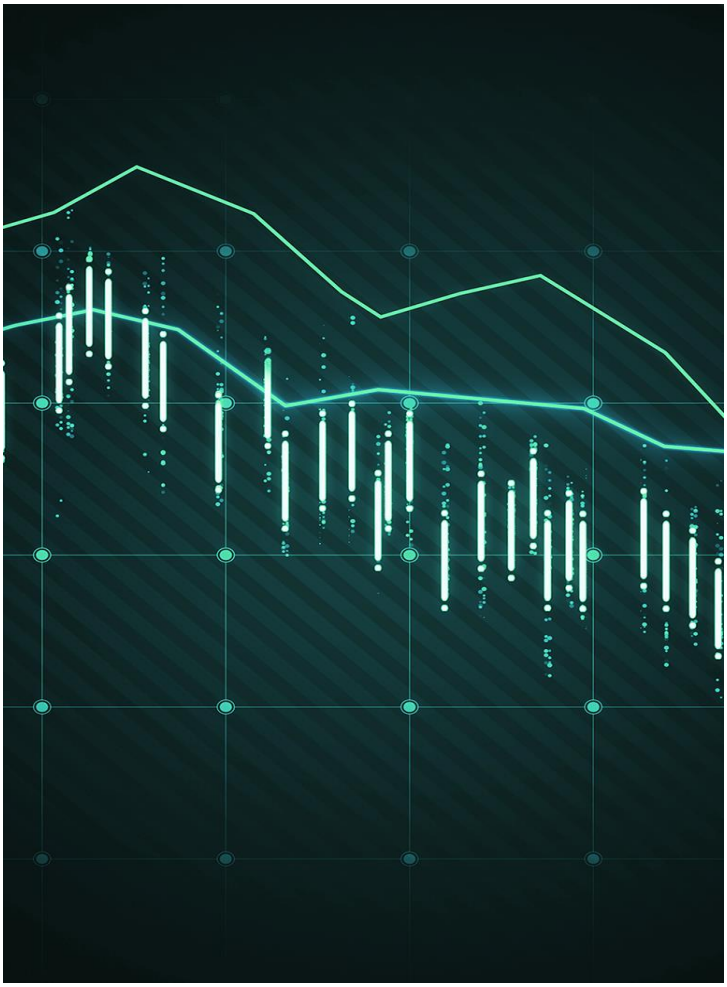
However, strong OEM discounting on new EVs creates pricing pressure, requiring used-car rentals to remain clearly cheaper to stay competitive. Operationally, ageing EVs generate complex maintenance needs—lower servicing requirements but higher tyre and repair costs—while the industry faces a shortage of skilled EV technicians.

Overall, used-car leasing is becoming a strategic lever for affordable electrification and residual-value stabilisation, positioning second-life EVs as a core growth engine for the sector.

03/ THE CASE FOR USED-CAR LEASING

Used-car leasing overcomes several practical issues consumers and organisations are dealing with: rising vehicle costs, increasing regulatory pressure, BEVs' fast depreciation and the drive to enhance the employee experience.

DECREASING THE TOTAL COST OF OWNERSHIP



For budget-conscious companies and consumers, it's now more expensive to acquire even a used vehicle outright, meaning more capital is tied up at the start of the lifecycle.

Depreciation further complicates the picture, for battery electric vehicles. European residual-value analysis from Autovista shows that three-year-old BEVs at typical fleet mileage retain a significantly lower share of their original list price than other powertrains across major markets. In Italy for example, BEVs retain around 36% of the list price after three years or 60,000 km on the clock. While BEV retention rates have fallen sharply, they now sit consistently below those of petrol and hybrid vehicles across major markets. This widening gap makes it more complex for fleets to forecast lifecycle costs and underscores the need for stabilising mechanisms

Recent analysis from McKinsey reinforces this trend, showing that used-vehicle prices peaked in 2022 and have since declined. The price correction has been especially pronounced for used battery-electric vehicles, with double-digit price drops recorded across several European countries. These dynamics are increasingly recognised at policy level, with country-specific discussions emerging around whether incentives for second-hand electric vehicles could support demand and stabilise residual values over time, reinforcing confidence across used and used BEV vehicles.

Looking ahead, incentive frameworks will play an important role in determining how quickly the market can scale. While public support mechanisms have historically focused on new vehicles, there is growing recognition that professionally-managed used vehicles, particularly when deployed through leasing, can deliver positive environmental outcomes by reducing demand for production. Imposing targets to corporates on new car market will not solve the BEV used car market challenges and **effective public policy interventions will have a much more significant impact** than their equivalent measures on the new car market
Supporting the used-BEV market is essential to move from a corporate early-adopter transition to a true consumer mass-adoption transition..

Without them, even the most ambitious new-vehicle mandates risk collapsing under their own weight. The United Kingdom provides a cautionary tale—and a compelling argument—for strengthening used BEV incentives across Europe

The case of the UK used-car market:

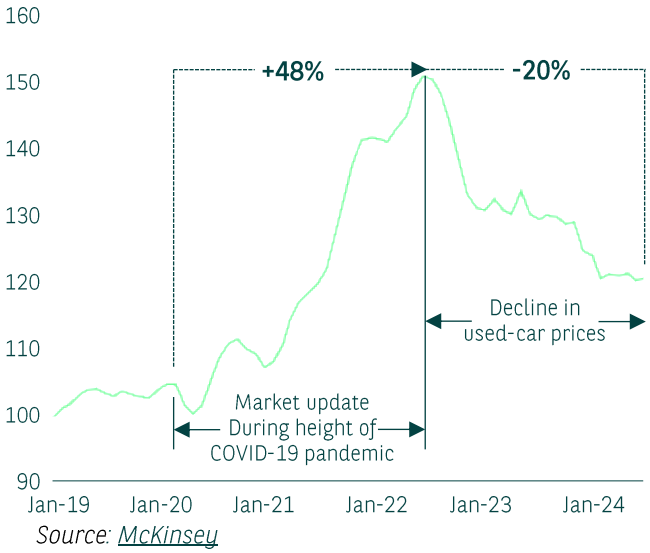
The UK's strong company-car tax incentives made BEVs extremely attractive for fleets, pushing fleet BEV adoption to 42% while private adoption stagnated at 8–10%. This created a structural imbalance: fleets generated a large supply of used BEVs, but weak private-buyer demand failed to absorb them, leading to one of Europe's steepest BEV residual-value crashes. As residual values collapsed, TCO for fleets increased sharply—one estimate shows a 30% RV drop can raise TCO by up to 35%, requiring subsidies to rise nearly 380% to offset the loss. Meanwhile, the UK's Zero Emission Vehicle (ZEV) mandate pushed BEV registrations upward artificially, but without matching consumer demand, OEMs resorted to subsidize the market by £4-5 Billion[1].

The lesson is clear: Imposing targets on the new-car market alone will not solve second-hand BEV market challenges. Effective public-policy interventions focused on used vehicles would have a far greater impact than equivalent measures applied to new cars.

[1] Green Fleets Initiative, Autorola & Leaseurope Webinar, December 2025

European used-car price index

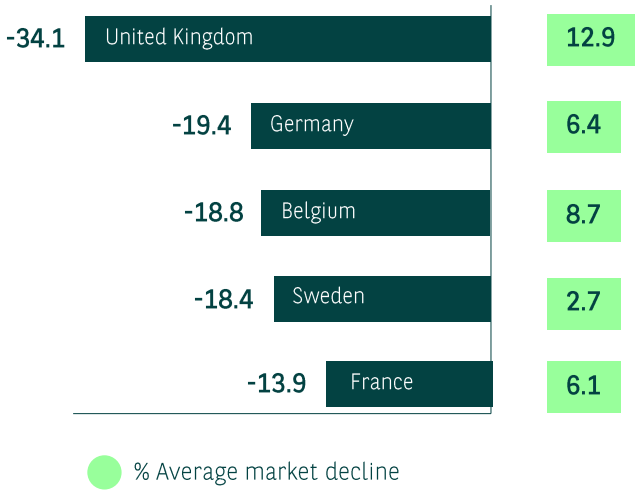
- Index Jan 2019 = 100



Source: McKinsey

Battery electric vehicle used-passenger-car price index

- From Jan 2023 to Feb 2024
- In %



Owning used vehicles outright translate into weaker value retention and higher total cost at disposal as well as greater uncertainty over lifecycle costs. Used-car leasing limits this exposure by keeping residual-value outcomes with the leasing provider.

A less visible TCO benefit of used-car leasing is faster deployment. Leasing providers typically handle sourcing vehicles, negotiating prices, managing legal yearly inspections, and ongoing servicing, helping fleet managers put vehicles on the road faster and reduce reliance on expensive interim rentals. In practice, specialist used-car leasing providers report total cost of ownership advantages of 10-25% compared with equivalent new vehicles, depending on vehicle age, mileage, and specification. This reflects lower acquisition costs and reduced exposure to depreciation.

REDUCING CARBON FOOTPRINTS

The Corporate Sustainability Reporting Directive (CSRD) requirements now extend emissions disclosure beyond vehicle use, placing greater emphasis on manufacturing and lifecycle impacts. At the same time, the EU Taxonomy classifies product life extension and reuse as sustainable economic activities. Vehicle rules are also being overhauled under Regulation (EU) 2023/851 on CO_2 emission performance standards for new passenger cars and new light commercial vehicles. Under the current framework, the EU has set a target to effectively eliminate CO_2 emissions from new cars and vans by 2035, signalling the end of new internal-combustion vehicle sales. While the European Commission proposed adjustments to the post-2030 framework in December 2025, the overall regulatory direction remains unchanged. Together, these measures leave fleets with limited room to delay electrification, while increasing focus on how quickly vehicles are replaced and how efficiently they're used.

In this context, purchasing new BEVs cannot be the solution to meet sustainability targets. Lead times, cost pressures, and supply constraints all create obstacles for electrification. Used-car leasing is a solution here, enabling access to second-life BEVs that already comply with emissions requirements. They can also be deployed more quickly and at a lower cost than new vehicles.

Building on this need for faster and more affordable electrification, the performance of used EVs becomes a decisive factor. Used electric vehicles prove highly reliable, as confirmed by **Arval's recent analysis on 24,000 battery SoH certificates. On average, EVs retain 93% capacity at 70,000 km or 4 years and remain above 90% even after 160,000 km or 6 years**. With slow, predictable degradation and certified assessments, buyers can trust the long-term performance and value of used electric cars.

As a result, the financial equation also becomes more attractive. Lower monthly costs reduce financial friction, while the absence of depreciation exposure limits downside risk for both fleets and drivers. Shorter lease terms, typically ranging from six to 36 months, also allow drivers to gain real-world experience of electric vehicles without committing to a high-value asset.

Ultimately, this makes used-car leasing a strategic accelerator for electrification. This "try it and build confidence" approach mirrors successful BEV adoption models seen in consumer markets, such as subscriptions and second-life leasing. In a fleet context, it enables organisations to accelerate electrification, without waiting for a full turnover to new vehicles.

IMPROVING THE EMPLOYEE EXPERIENCE

Employee considerations play an increasing role in fleet decisions, according to the Arval Mobility Observatory Barometer. Among companies expecting their fleets to grow, 43% cite HR considerations such as talent attraction and employee retention as key motivations. Regional differences also emerge: HR drivers are strongest in North America, while European companies place greater relative emphasis on CSR objectives and company image alongside cost and regulatory factors.

Company cars remain a valued employee benefit. Around 840,000 UK employees received company car benefits in the UK tax year 2023-24, and tax policy continues to shape demand. In the UK, the benefit-in-kind (BiK) rate for fully zero-emission company cars remains at 3% for 2025/26, providing a significant tax advantage compared with internal-combustion vehicles.

Although there was no major overhaul of company-car taxation in the 2025 Autumn Budget, the government introduced a temporary BIK easement for certain plug-in hybrid vehicles but delayed planned changes to Employee Car Ownership Schemes until April 2030, preserving the current incentive structure for many fleets and employees. Similar incentives exist across Europe: in markets such as the Netherlands, Belgium, and France, electric vehicles benefit from substantially lower company-car taxation than ICE cars, reducing the net cost for employees.

Used-car leasing allows employers to gain access to recent vehicles at a more competitive price point than they've been traditionally offered. Lower vehicle costs make BEVs viable within a wider range of corporate, voluntary, or salary-based mobility schemes, in line with tax and sustainability policies.

Taken together, these dynamics explain why used-car leasing is no longer a marginal or experimental model. According to Mobilians, more than one in three used vehicles purchased by private individuals were financed through leasing, with volumes growing 24% year on year. In fleet contexts, leasing already accounts for 39% of used-vehicle finances. This indicates that access to second-life vehicles is already deeply embedded in the mainstream.

04/ USED-CAR POLICY TOOLKIT: DEFINE THE RULES BEFORE YOU PROCURE

Used-car leasing should be governed by the same discipline as a new-vehicle policy, with additional clarity around eligibility, vehicle standards, and service expectations. Key elements to define include:

ELIGIBILITY AND CHOICE LISTS: WHO GETS WHAT?

- ✓ Which roles or business units are eligible for UCL (e.g., perk cars, B2B2E, pool fleet)?
- ✓ Powertrain strategy: where can you include BEVs, PHEVs, ICE, and LCVs?
- ✓ Acceptable age/mileage bands for used vehicles (e.g., 1-5 years, or less than 120,000 km).

TECHNICAL STANDARDS: WHAT QUALIFIES AS A USED-CAR LEASING READY VEHICLE?

- ✓ Battery SoH minimum for BEVs (e.g., 85-90% at delivery) plus documentation requirements.
- ✓ Refurbishment standards: multi-point inspection, software updates, safety checks, and vehicle cleaning. .
- ✓ Warranty must-haves: remaining OEM battery warranty; contractual coverage for major components; clarity on what is excluded.
- ✓ Service package expectations: SMR, tyres, assistance, mobility guarantee, relief vehicle, and insurance.
- ✓ End-of-term process: clear damage matrix; expectations for battery degradation; mileage tolerance.

COMMERCIAL PARAMETERS

- ✓ Recommended shorter Used-Car Leasing durations (e.g., 24-48 months) to reduce uncertainty and improve employee acceptance.
- ✓ SLA expectations on short sourcing and delivery lead times for in-stock vehicles, downtime, and availability of replacement vehicles.
- ✓ Residual-value risk-sharing language (usually borne by the lessor).

HR AND B2B2E PROGRAMMES

Clarity and transparency are essential when offering used-car leasing to employees. HR teams play a central role in communication, so your teams understand and trust your mobility schemes. They also make sure that they align with tax and reward frameworks. To do so:

- ✓ Communicate benefits-in-kind clearly in your HR materials.
- ✓ Use digital tools portals that allow employees to browse refurbished or pre-approved used vehicles.
- ✓ Supply clear guidance on charging access, battery health, and business use expectations.
- ✓ Build a simple FAQ tackling the main concerns: “Is a used EV still good?”, “Will the range drop?”, “What happens at end-of-lease?”

GOVERNANCE AND CHANGE MANAGEMENT

Used-car leasing typically cuts across fleet, procurement, sustainability, and HR functions. Clear governance avoids fragmented decision-making and inconsistent application. Key actions include:

- ✓ Establishing a cross-functional steering group, for example, made up of Fleet, Procurement, CSR/Sustainability, and HR.
- ✓ Defining decision rights: who approves exceptions; who reviews supplier SoH data?
- ✓ Introducing Used-Car Leasing in phases through communications, driver briefings, and training (e.g., BEV induction sessions).

12-MONTHS ROADMAP AND KPIs

A phased rollout allows fleet managers to test assumptions, refine standards, and build internal confidence.

PILOT (0-6 MONTHS)

- ✓ Select a limited pool of used vehicles as a pilot project (a mix of BEVs and ICE/LCVs as relevant
- ✓ Monitor SoH readings, downtime, SMR cost, and employee satisfaction

EVALUATE (6-9 MONTHS)

- ✓ Compare TCO vs. new-vehicle baseline
- ✓ Validate carbon savings (Scope 3: avoided manufacturing impact)
- ✓ Adjust eligibility and quality standards based on findings

SCALE (9-12 MONTHS)

- ✓ Integrate UCL into standard car policy and B2B2E offerings.
- ✓ Expand the supplier panel if needed.

SAMPLE KPIs TO TRACK

Tracking a small set of relevant key performance indicators (KPIs) allows fleet managers to verify that the model is delivering the intended outcomes. **Here are some essential KPIs to track:**

- ✓ **Battery SoH compliance rate**
- ✓ **Warranty claim rate**
- ✓ **Downtime per vehicle**
- ✓ **Employee satisfaction** (simple post-handover survey)
- ✓ **Scope 3 reduction from avoided manufacture**
- ✓ **BiK equity across employee groups**

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CONCLUSION

USED-CAR LEASING: THE NEXT PHASE OF FLEET TRANSFORMATION

Used-car leasing is quickly moving from a niche solution to a mainstream component of fleet-managers and part of an Individual's global strategy. McKinsey estimates that the European used-car leasing market could reach €390 billion by 2030, reflecting growing demand and increasing maturity across supply, refurbishment, and financing models.

Supply conditions are also changing. The first large wave of battery electric vehicles entered European markets between 2020 and 2023, followed by an all-time high of 381,970 BEV registrations in the UK in 2024, representing 19.6% of the market. As these vehicles return from initial lease cycles, we will see a growing volume of relatively new, well-equipped electric vehicles becoming available for second-life use.

Regulation will reinforce this trend. From February 18, 2027, the EU Battery Regulation (2023/1542) will require digital battery passports on new vehicles, including information on State of Health, materials, and repairability. This will improve transparency across the used-vehicle chain and reduce uncertainty around battery condition, a key consideration for fleet managers and individuals for evaluating used vehicles. Establishing consistent, trusted battery-health documentation therefore remains a key enabler for strengthening confidence in second-life BEVs

The time is ripe. Industry action alone will not be sufficient: public policies must also recognise the specific dynamics of the second-hand BEV market. By integrating targeted support for used electric vehicles and ensuring that incentives address both new and second-life models, policymakers can help prevent market distortions and sustain a balanced, long-term electrification pathway.

The question for fleet leaders is no longer whether used-car leasing belongs in their strategy, but how deliberately they choose to deploy it.

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