Cox Automotive

Strategic Insights & Trends

2026

FLEET EDITION

The Industry's Most Complete View of What's Ahead

Cox Automotive's unmatched access to first-party data — spanning inventory, transactions, consumer behavior, and market intelligence across 12 brands — gives us a view of the automotive industry that no one else has. These themes are built on that foundation.

Economic

01 CAUTIOUS OPTIMISM

The economy is improving, but the expansion is narrow, and uncertainty remains high.

02 DEMAND CONSTRAINED

Affordability pressure is driving **longer replacement cycles and tighter acquisition scrutiny.**

Auto Production

03 TARIFF TURBULENCE

Vehicle **acquisition costs are heading higher;** no vehicle is tariff-free.

Fleet

04 FREIGHT RECOVERY

Freight recovery is underway, but the **opportunity is sector and geography specific.**

Technology

05 AI ENTERPRISE VALUE

AI is delivering **measurable cost savings** in fleet operations today.

06 AI TRANSFORMS AUTOMOTIVE

Agentic AI is beginning to **automate procurement, compliance, and fleet administration.**

01

CAUTIOUS OPTIMISM

The economy is improving — but the expansion is narrow, and uncertainty remains high.

High-income households are driving growth while lower-income consumers face real affordability strain.

WHAT THIS MEANS

Fleet managers who can demonstrate clear ROI and total cost of ownership will find capital approvals easier to secure, even as broader economic uncertainty keeps budget scrutiny high.

HOW WE HELP

Cox Automotive's market and consumer data tools help you build the business case for fleet investment.

02

DEMAND CONSTRAINED

Affordability pressure is driving longer replacement cycles and tighter acquisition scrutiny.

Consumer savings rates have declined for multiple consecutive months — signaling rising financial stress that is flowing through to commercial spending decisions.

WHAT THIS MEANS

Expect more stakeholder scrutiny on fleet spend. TCO-grounded arguments and data-backed procurement decisions will be essential for budget approval in 2026.

HOW WE HELP

Cox Automotive's data and remarketing tools help fleet operators build TCO models grounded in real transaction data.

03

TARIFF TURBULENCE

Vehicle acquisition costs are heading higher; no vehicle is tariff-free.

Entry-level imports under $25K have declined 70% as tariff pressure forces OEMs to cut or reprice the segment.

WHAT THIS MEANS

Consider accelerating near-term procurement and locking in pricing before tariff costs fully materialize, particularly on import-heavy fleet categories.

HOW WE HELP

Cox Automotive's pricing and market data tools help you fleet operators time procurement decisions with real-time data.

04

FREIGHT RECOVERY

Freight recovery is underway, but the opportunity is sector and geography specific.

Carrier capacity is contracting as regulations tighten and smaller carriers exit, setting up a supply-side tailwind for operators positioned to capture growing demand.

WHAT THIS MEANS

Prioritize fleet expansion where manufacturing activity is concentrating. The fleets that kept PM compliance high during the downturn are best positioned to take share as demand returns.

HOW WE HELP

Cox Automotive's commercial and fleet solutions help you identify recovery signals by sector and region.

05

AI ENTERPRISE VALUE

AI is delivering measurable cost savings in fleet operations today.

High-performing AI enterprises are seeing real value creation, but proving ROI remains the critical test separating signal from noise.

WHAT THIS MEANS

Predictive maintenance, route optimization, and utilization analytics are compressing costs for early adopters. If you haven't evaluated these tools recently, you're likely leaving savings on the table.

HOW WE HELP

Cox Automotive's technology solutions move fleet management from reactive to predictive.

06

GEN AI TRANSFORMS AUTO

Agentic AI is beginning to automate procurement, compliance, and fleet administration.

Agentic AI tools are entering pilot phase at forward-leaning operators in 2026, automating call handling, scheduling, follow-up, & service recommendations autonomously.

WHAT THIS MEANS

Early adopters are compressing operational costs and recovering meaningful staff capacity. **Piloting AI-powered fleet tools in 2026 is a low-risk, high-return investment.**

HOW WE HELP

Cox Automotive's technology and data platforms reduce administrative burden and surface actionable intelligence faster.

DEVELOPED BY

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Jonathan Smoke leads Cox Automotive’s strategy team and is responsible for shaping the company’s long-term vision, developing and executing strategic initiatives and ensuring the company's success in a rapidly evolving market.

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