

Truck-as-a-Service Market Size, Share & Trends Analysis Report By Service (Vehicle Subscription & Pay-per-Use, Dedicated Fleet Heavy-Duty Trucks), By Truck Type, By Propulsion, By End-user, By Region, And Segment Forecasts, 2025 - 2033

<https://marketpublishers.com/r/TE2B8F423F59EN.html>

Date: October 2025

Pages: 130

Price: US\$ 4,950.00 (Single User License)

ID: TE2B8F423F59EN

Abstracts

The global truck-as-a-service market size was estimated at USD 30.69 billion in 2024, and is projected to reach USD 197.07 billion by 2033, growing at a CAGR of 23.7% from 2025 to 2033. The market is gaining momentum, driven by the rising use of telematics, IoT, and predictive analytics that enhance fleet optimization and uptime.

The shift toward asset-light business models, including logistics and freight subscription or pay-per-use services, is encouraging companies to access trucks through services rather than ownership. Rapid expansion in e-commerce, retail, and just-in-time delivery networks is increasing demand for flexible, on-demand truck capacity, while stringent emission regulations are accelerating the adoption of electric and alternative-fuel trucks within Truck-as-a-Service (TaaS) offerings.

Expansion of subscription-based and pay-per-use services in emerging markets presents significant opportunities, alongside the integration of autonomous and semi-autonomous driving technologies that are expected to transform efficiency and safety standards in fleet operations. However, high upfront costs and the complex integration of connected services and EV infrastructure remain key challenges for service providers. In addition, limited charging and refueling infrastructure for electric and fuel cell trucks continues to act as a restraint, restricting large-scale adoption across global fleets.

Companies are progressively opting for service-based access to trucks through vehicle

subscription and pay-per-use models, reducing the need for significant capital investment in fleet ownership. This transition allows enterprises to manage operational costs more effectively, enhance fleet utilization, and scale transportation capacity based on fluctuating demand. Additionally, reliance on third-party service providers enables logistics operators to focus on core competencies, such as supply chain optimization and last-mile delivery, while outsourcing fleet management responsibilities. The adoption of subscription and pay-per-use offerings is particularly pronounced in e-commerce, retail, and just-in-time delivery networks, where flexibility and responsiveness are critical. Therefore, this trend is expected to accelerate the expansion of TaaS platforms, especially in regions witnessing rapid industrial and commercial growth.

The rapid growth of e-commerce, retail, and just-in-time delivery networks has been identified as a major driver for the Truck-as-a-Service (TaaS) market, as it increases demand for flexible, on-demand truck capacity. In India, the e-commerce sector achieved a gross merchandise value (GMV) of approximately USD 14 billion in 2025, reflecting a 12% year-on-year growth, according to India Brand Equity Foundation. The industry, valued at USD 125 billion in 2024, is projected to expand to USD 345 billion by 2030, representing a compound annual growth rate (CAGR) of 15%. Furthermore, a joint report by ANAROCK and ETRetail projects that the sector could reach USD 550 billion by 2035, driven by increasing digital adoption and evolving consumer behavior. This surge in e-commerce activity is expected to intensify reliance on TaaS platforms, enabling logistics providers to access trucks on demand and scale operations efficiently.

The deployment of battery electric vehicles (BEVs) and fuel cell electric vehicles (FCEVs) within TaaS platforms is heavily dependent on the availability of reliable and widespread charging or hydrogen refueling networks. In many regions, particularly in emerging markets, the lack of standardized charging stations, slow charging speeds, and uneven geographic coverage present operational challenges for fleet operators. Thus, logistics providers face constraints in planning routes, scheduling deliveries, and maintaining consistent uptime, limiting the ability to scale electric or fuel cell truck adoption efficiently. This infrastructure gap continues to impede the broader transition toward sustainable trucking solutions. Addressing these challenges through investments in public and private charging networks and policy support is expected to be critical for enabling large-scale deployment of electrified and hydrogen-powered fleets globally.

Global Truck-as-a-Service Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and

provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global truck-as-a-service market report based on service, truck type, propulsion, end-user, and region.

Service Outlook (Revenue, USD Million, 2021 - 2033)

Vehicle Subscription & Pay-per-Use

Full-Service Leasing & Fleet Management

Freight Capacity-as-a-Service (FaaS)

Dedicated Fleet Heavy-Duty Trucks (HDT)

Other Services

Truck Type Outlook (Revenue, USD Million, 2021 - 2033)

Heavy-Duty Trucks (HDT)

Medium-Duty Trucks (MDT)

Light-Duty Trucks (LDT)

Propulsion Outlook (Revenue, USD Million, 2021 - 2033)

Internal Combustion Engine (ICE)

Battery Electric Vehicle (BEV)

Hybrid

Fuel Cell Electric Vehicle (FCEV)

End-user Outlook (Revenue, USD Million, 2021 - 2033)

Logistics & Transportation

Retail & E-commerce

Manufacturing & Industrial

Construction & Mining

Other End Users

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Asia Pacific

China

India

Japan

Australia

South Korea

Latin America

Brazil

Middle East & Africa (MEA)

UAE

Kingdom of Saudi Arabia (KSA)

South Africa

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