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E-Scooter Sharing Market Forecasts to 2032 – Global Analysis By Vehicle Type (Stand-up E-Scooters, and Sit-down E-Scooters), Propulsion Type (Battery Electric, and Hybrid), Trip Type, Business Model, Ownership Type, and By Geography

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Abstracts

According to Stratistics MRC, the Global E-Scooter Sharing Market is accounted for $5.3 billion in 2025 and is expected to reach $13.6 billion by 2032, growing at a CAGR of 14.3% during the forecast period. E-scooter sharing offers short-distance, on-demand trips via app-accessible electric scooters deployed across cities. Operators manage fleets, charging logistics, and user safety measures while partnering with municipalities to meet parking and speed regulations. The model reduces reliance on cars for quick trips and complements public transit, but challenges include sidewalk clutter, safety incidents, and unit lifespan.

According to NACTO and the U.S. DOE, shared e-scooter and bike trips in the U.S. reached ~133 million trips in 2023.

Market Dynamics:

Driver:

Cost-effectiveness for short trips

The fundamental appeal of e-scooter sharing lies in its superior cost-efficiency for short urban journeys. Compared to ride-hailing services or vehicle ownership, which involve high per-mile costs, insurance, and parking fees, e-scooters offer a significantly cheaper alternative for the first-and-last-mile commute. Because they are so cheap, a wide

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range of people can use them, including students and people who commute every day. This directly leads to more people using them and more often. Consequently, this feature drives consistent revenue streams for operators and expands the total addressable market, solidifying its role as a primary market catalyst.

Restraint:

Seasonal demand fluctuations in colder climates

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Opportunity:

Development of swappable battery technology

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Threat:

Public safety concerns and accident liability issues

High-profile accidents involving injuries, often linked to rider negligence, improper parking, and conflicts with pedestrians, have spurred negative public perception and stringent regulatory crackdowns. Cities are responding with stricter permitting, reduced fleet sizes, or outright bans. Additionally, the looming financial liability from lawsuits and

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mandatory insurance requirements can drastically increase operational expenses, threatening the viability of service providers in key markets.

Covid-19 Impact:

The pandemic initially crippled the market, as lockdowns and fear of public contact led to a dramatic plunge in ridership, particularly from tourists and commuters. However, the crisis also catalyzed a market repositioning. E-scooters were rapidly adopted as a safe, personal mode-of-transport alternative to crowded public transit for essential trips. This change in how people use transportation showed that e-scooters are useful for local travel while keeping distance from others, helping the market recover strongly and creating a more reliable demand for commuting in cities after the pandemic.

The stand-up E-scooters segment is expected to be the largest during the forecast period

The stand-up E-scooters segment is expected to account for the largest market share during the forecast period, which is attributed to its established first-mover advantage and widespread familiarity among users. Typically, these models are lighter, more maneuverable in dense urban settings, and have a lower upfront cost for operators, allowing for aggressive fleet expansion. Their design is synonymous with the very concept of shared e-scooters for most consumers. Moreover, the extensive existing infrastructure and operational protocols built around this model create significant barriers for competing segments, ensuring its continued market leadership throughout the forecast period.

The battery electric segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the battery electric segment is predicted to witness the highest growth rate due to the global push for sustainable urban mobility and continuous advancements in battery technology. As cities enforce stricter emissions regulations, the zero-emission nature of battery-electric powertrains becomes a critical advantage. Furthermore, ongoing improvements in battery energy density extend scooter range and reduce downtime, while decreasing charging times enhances fleet utilization. This alignment with environmental goals and operational efficiency makes it the focal point for new investment and innovation, driving its accelerated growth.

Region with largest share:

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During the forecast period, the North America region is expected to hold the largest market share due to high urban population density, strong technological adoption, and substantial early-stage venture capital investment anchoring North America's leading market share. Well-established shared mobility culture in major cities, coupled with progressive regulatory frameworks in many municipalities, has created fertile ground for operator expansion. Additionally, the region's pronounced need for solving first-and-last-mile transportation challenges, combined with high consumer spending power, ensures sustained usage rates, cementing its position as the most significant revenue-generating market globally.

Region with highest CAGR:

During the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by its massive, densely populated cities grappling with severe traffic congestion and pollution. Governments are actively promoting e-scooters as a viable solution to urban mobility woes, fostering a favorable regulatory environment. Moreover, the rapidly growing middle class, increasing smartphone penetration, and the presence of major local operators are accelerating market penetration. This combination of acute urban challenges and supportive demographics creates a potent environment for the highest growth rate in the forecast period.

Key players in the market

Some of the key players in E-Scooter Sharing Market include Bird Global, Inc., Lime, Tier Mobility SE, Voi Technology AB, Dott B.V., Bolt Technology O?, Superpedestrian Ltd., Beam Mobility Holdings Pty Ltd, Spin, Inc., Helbiz, Inc., Wind Mobility, Neuron Mobility Pte. Ltd., Revel Transit, Inc., Yulu Bikes, GO Sharing, and Gogoro Co., Ltd.

Key Developments:

In June 2025, Bird is expanding its vehicle fleet with new electric scooters and e-bikes built for today’s urban travelers. As more people seek clean, convenient alternatives to cars, Bird is introducing a new and diversified fleet of vehicles designed to make micromobility more approachable, more comfortable, and more aligned with the way people actually move through cities. Launching in North America this summer in Denver, Atlanta, Nashville, Los Angeles, Austin, and Seattle (following city approval) following with additional markets globally in H2 2025.

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In March 2025, Voi launched three new vehicle models (Voiager 8 e-scooter, Explorer 4 e-bike, Explorer Light 1) as part of a 2025 vehicle family update.

Vehicle Types Covered:

- Stand-up E-Scooters
- Sit-down E-Scooters

Propulsion Types Covered:

- Battery Electric
- Hybrid

Trip Types Covered:

- First-and-Last Mile Connectivity
- Short-Distance Commuting
- Leisure and Tourism

Business Models Covered:

- Dockless
- Station-Based

Ownership Types Covered:

- Franchise-Owned
- Company-Owned

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Regions Covered:

- North America
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  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific

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Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
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- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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