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Electric Scooter Fleets Market Forecasts to 2034 – Global Analysis By Fleet Type (Shared Mobility Fleets and Delivery Fleets), Battery Technology, Service Model, Ownership Model and By Geography

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Abstracts

According to Stratistics MRC, the Global Electric Scooter Fleets Market is accounted for $7.5 billion in 2026 and is expected to reach $14.9 billion by 2034 growing at a CAGR of 9.0% during the forecast period. Electric scooter fleets are becoming an important element of city transportation networks, providing affordable, efficient, and environmentally friendly travel options. Operated by shared mobility companies, these fleets consist of numerous electric scooters distributed throughout urban areas to support short trips. Riders can easily locate and unlock scooters using smartphone applications, allowing flexible mobility. Their expansion is fueled by rising interest in green transportation, efforts to ease traffic congestion, and the need for effective last-mile connectivity. Innovations like real-time GPS monitoring, IoT-enabled systems, and advanced battery management technologies improve performance, efficiency, and scalability across rapidly growing urban mobility ecosystems systems.

According to the International Energy Agency (IEA), electric two-wheelers made up more than half of all two-wheeler sales in China in 2023, while their share was around one?third in Vietnam. In most other regions, including Europe, India, and North America, the share remained below 10%.

Market Dynamics:

Driver:

Rising demand for sustainable urban mobility

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Electric scooter fleets are expanding as cities and consumers increasingly prioritize environmentally friendly transportation options that reduce pollution and carbon output. Governments and urban planners are encouraging cleaner mobility solutions to address worsening air quality and reliance on conventional fuel-based vehicles. Electric scooters, offering zero-emission travel and efficient energy use, are ideal for short urban commutes. Public awareness regarding climate change is also driving behavioral shifts toward sustainable transport choices. Consequently, shared mobility providers are rapidly scaling their scooter fleets to satisfy growing demand for green, affordable, and convenient travel alternatives across modern urban landscapes.

Restraint:

High initial deployment and operational costs

Electric scooter fleet growth is restricted by substantial upfront capital requirements and continuous operational expenses. Operators need to spend heavily on acquiring vehicles, setting up charging networks, and implementing advanced software systems for fleet tracking and management. Ongoing costs such as maintenance, battery degradation, repairs, and redistribution of scooters across cities further increase financial burden. Additionally, ensuring proper parking infrastructure and managing vandalism-related losses add to expenses. These high cost structures make it difficult for smaller companies to enter the market and challenge profitability even for established players, thereby slowing down overall expansion of electric scooter fleets globally.

Opportunity:

Advancements in battery technology and energy efficiency

The electric scooter fleet market is expected to benefit from continuous advancements in battery performance and energy storage technologies. Improvements in lithium-ion chemistry, fast-charging capabilities, and lightweight energy systems are increasing scooter range and reducing charging frequency. Enhanced battery durability lowers maintenance and replacement expenses for operators, improving profitability. Additionally, innovations such as modular battery swapping and smart charging infrastructure are making fleet operations more efficient. These developments address key operational challenges and enable wider deployment across cities. As energy efficiency continues to improve, electric scooter fleets will become more scalable and

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reliable for urban mobility applications.

Threat:

Intense market competition

The electric scooter fleet market is threatened by intense competition among existing operators and new entrants entering the shared mobility sector. Low barriers to entry in many cities encourage frequent market participation, resulting in overcrowded competition. Large mobility companies are also diversifying into scooter-sharing services, further increasing pressure on independent operators. This environment drives down rental prices and reduces overall profitability. Companies must spend heavily on promotions, incentives, and fleet expansion to retain users. Such aggressive competition limits margins and makes it difficult for smaller or newer operators to sustain long-term operations in highly competitive urban markets.

Covid-19 Impact:

The COVID-19 pandemic created both challenges and recovery-driven opportunities for the electric scooter fleets market. In the initial phase, strict lockdowns and travel restrictions led to a steep decline in ridership, as commuting, tourism, and outdoor mobility activities were severely reduced. Fleet operators experienced revenue drops and temporary suspension of services. However, as restrictions eased, demand rebounded strongly due to increased preference for safe, contact-free, and individual transport modes. Consumers moved away from crowded public transit, boosting micro-mobility usage. This shift, along with growing focus on sustainable urban transport, supported gradual recovery and renewed growth in the market.

The shared mobility fleets segment is expected to be the largest during the forecast period

The shared mobility fleets segment is expected to account for the largest market share during the forecast period as they are widely used for passenger-focused urban travel needs. These fleets provide easily accessible, on-demand scooter services that support short trips within cities, making them highly popular among commuters and travelers. Rising preference for cost-effective and environmentally friendly transport solutions has significantly increased their adoption. Their seamless integration with digital platforms and strong penetration in urban centers further enhance their market position. Additionally, rapid urban growth and the expansion of shared transportation networks

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continue to reinforce the leading role of shared mobility fleets in the overall market structure.

The franchise fleets segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the franchise fleets segment is predicted to witness the highest growth rate owing to their flexible and expansion-friendly structure. This model allows companies to scale operations quickly by collaborating with regional partners who handle local fleet management. It significantly lowers capital requirements for parent companies while accelerating geographic expansion. Rising demand for localized and accessible mobility services supports this growth trend. Moreover, the adoption of unified operational systems and digital platforms enhances performance consistency. These factors collectively position franchise fleets as the most rapidly growing segment within the electric scooter fleets industry over the forecast period.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share because of fast urban growth, supportive electric mobility policies, and increasing use of shared transportation services. Major countries including China, India, Japan, and South Korea are driving strong demand for affordable and sustainable urban commuting options. High population density and severe traffic congestion encourage adoption of micro-mobility solutions. Presence of established mobility companies and rapid digital platform expansion further strengthen regional leadership. Continuous improvements in charging networks and growing environmental awareness also support market expansion across key cities, reinforcing its position as the leading regional market globally overall dominance.

Region with highest CAGR:

Over the forecast period, the Europe region is anticipated to exhibit the highest CAGR as governments increasingly prioritize clean transportation and urban decarbonization goals. Rising investments in micro-mobility infrastructure, including dedicated lanes and parking systems, are boosting adoption of shared electric scooters. Major cities are implementing strict emission regulations and limiting internal combustion vehicles, which further supports market expansion. Consumer preference for sustainable and convenient short-distance travel is also growing rapidly. Strong integration of scooter fleets with public transit networks and supportive regulatory frameworks enhance

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usability, positioning Europe as the fastest-growing regional market throughout the forecast period

Key players in the market

Some of the key players in Electric Scooter Fleets Market include Lime, Bird Rides, Inc., Spin, Tier Mobility, Voi Technology, Dott, Helbiz, Neuron Mobility, TIER Tab, Flash Electric, GOVECS AG, Cityscoot, Wind Mobility, Beam Mobility Holdings Pte. Ltd., Cooltra Motosharing, S.L.U., Vogo Automotive Pvt. Ltd., Blip Scooters and Bit Mobility.

Key Developments:

In July 2025, Bird Rides and Segway announced a strategic alliance to roll out advanced new electric scooters and e-bikes across key North American markets. This next-generation fleet combines Segway's engineering excellence with Bird's operational expertise to set new standards for performance, safety, and sustainability in urban transportation.

In May 2025, Lime and Cyclic Materials announce a strategic agreement to recycle magnets from retired electric motors powering e-bikes and e-scooters across Canada and the United States. The agreement marks the first at-scale recycling initiative focused on rare earth magnets in North America in the micromobility sector.

Fleet Types Covered:

- Shared Mobility Fleets
- Delivery Fleets

Battery Technologies Covered:

- Swappable Battery Fleets
- Fixed Battery Fleets

Service Models Covered:

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- Pay-Per-Ride
- Subscription Plans
- Enterprise Contracts

Ownership Models Covered:

- Company-Owned Fleets
- Franchise Fleets
- Partner Fleets

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands

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- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

South America

- Brazil

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- Argentina
- Colombia
- Chile
- Peru
- Rest of South America

Rest of the World (RoW)

- Middle East
  - Saudi Arabia
  - United Arab Emirates
  - Qatar
  - Israel
  - Rest of Middle East
- Africa
  - South Africa
  - Egypt
  - Morocco
  - Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments

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- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

- Company Profiling
  - Comprehensive profiling of additional market players (up to 3)
  - SWOT Analysis of key players (up to 3)
- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)
- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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