

Last-Mile Connectivity Market Forecasts to 2034 – Global Analysis By Transport Mode (Microtransit Services, Bike-Sharing Programs, Ride-Hailing Platforms, Corporate Mobility Shuttles, Demand Responsive Transit and Electrified Public Transit Extensions), Technology, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Last-Mile Connectivity Market is accounted for \$212.9 billion in 2026 and is expected to reach \$357.8 billion by 2034 growing at a CAGR of 6.7% during the forecast period. Last-mile connectivity describes the concluding portion of a network that provides services like internet, communication, or transport to end users. It is vital for maintaining smooth access, dependability, and customer satisfaction. In digital systems, it links providers to residences and businesses using solutions such as fiber, wireless technologies, or satellites. In mobility, it ensures a smooth link from transit points to final destinations. Effective last-mile strategies boost accessibility, minimize delays, and enhance system efficiency. As urban populations grow and digital needs increase, improving last-mile connectivity is increasingly important for supporting economic progress and advancing smart city initiatives worldwide.

According to the World Bank, broadband infrastructure expansion—including last-mile connectivity—has a measurable positive impact on economic growth. Empirical studies supported by the World Bank show that a 10% increase in broadband penetration is associated with approximately 1–1.5% higher GDP growth in developing countries.

Market Dynamics:

Driver:

Rising e-commerce demand

The growth of online retail has strongly contributed to the expansion of the last-mile connectivity market. A rise in internet-based shopping has increased the need for quick, dependable, and effective delivery services. Customers now expect faster shipping options, encouraging businesses to strengthen logistics systems and improve delivery efficiency. Companies are adopting technologies like route planning tools, live tracking, and automation to meet these demands. As a result, last-mile connectivity has become essential in supply chains, helping ensure prompt deliveries, lower operational expenses, and better customer experiences, while allowing businesses to remain competitive in a rapidly evolving and highly demanding marketplace.

Restraint:

Traffic congestion and urban challenges

Heavy traffic and complicated city conditions create major obstacles for the last-mile connectivity market. Growing numbers of vehicles, inadequate infrastructure, and regular delays interfere with delivery timelines and lower efficiency. Operating in crowded urban zones demands additional time and resources, increasing fuel usage and labor expenses. Restrictions on parking and strict regulations make delivery processes more difficult. These issues affect the speed and reliability of services, which are essential for customer satisfaction. With ongoing urban growth, companies must address these barriers, often requiring significant investment in innovative solutions and alternative delivery approaches to maintain effective last-mile operations.

Opportunity:

Expansion of micro-fulfillment centers

The rise of micro-fulfillment hubs provides a valuable opportunity for enhancing last-mile connectivity. These compact warehouses, positioned near customers, allow quicker order handling and shorter delivery routes, especially in cities. By storing products closer to demand centers, companies can cut delivery time and reduce transport costs while boosting operational efficiency. These facilities also enable rapid delivery options such as same-day or on-demand services, improving customer experience. As online shopping grows, firms are increasingly adopting localized distribution strategies. This

shift is expected to streamline last-mile logistics, ease urban congestion, and offer flexible solutions for handling increasing delivery demands.

Threat:

Intense market competition

Strong competition within the last-mile connectivity market presents a major challenge for businesses aiming to retain profitability and expand their presence. Many logistics companies, online retailers, and emerging firms compete by providing quicker services at reduced prices. This situation pushes organizations to invest heavily in advanced technologies and improved operations, raising expenses. Continuous price reductions and declining profit margins create survival difficulties, especially for smaller firms. At the same time, customer expectations continue to rise, leaving minimal tolerance for mistakes. To remain viable, companies must find ways to stand out while controlling costs, making long-term sustainability increasingly complex.

Covid-19 Impact:

The pandemic of COVID-19 had a major influence on the last-mile connectivity market, boosting the need for delivery services and online solutions. Restrictions on movement and lockdown measures increased reliance on e-commerce, food delivery, and essential supplies, putting additional strain on logistics operations. Businesses responded by increasing fleet capacity, introducing contactless deliveries, and using advanced tracking technologies. At the same time, supply chain disruptions, workforce limitations, and health concerns created difficulties. Nevertheless, the situation emphasized the importance of strong last-mile systems, encouraging innovation and increased investment in automation, digital tools, and infrastructure to address changing consumer demands.

The ride-hailing platforms segment is expected to be the largest during the forecast period

The ride-hailing platforms segment is expected to account for the largest market share during the forecast period because of their high usage, ease of access, and convenience. These services offer on-demand travel that effectively connects passengers from transit points to their final locations. Features such as simple mobile interfaces, live tracking, and adaptable pricing appeal to a wide range of users in both urban and semi-urban regions. Their extensive availability and ongoing expansion

strengthen their market position. Collaborations with public transport systems also improve connectivity. With growing demand for fast and dependable travel options, ride-hailing services remain central to last-mile mobility solutions.

The AI routing engines segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the AI routing engines segment is predicted to witness the highest growth rate because they greatly improve operational efficiency and planning. By utilizing advanced algorithms and real-time information, these systems determine the most effective delivery routes, saving time and lowering fuel usage. They can adjust quickly to traffic changes, weather conditions, and shifting delivery needs, ensuring smooth operations. Companies are increasingly relying on these technologies to boost accuracy, cut costs, and improve service quality. As logistics operations grow more complex, the need for smart routing tools rises, supporting the rapid growth of this segment.

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, dense populations, and expanding online commerce in key countries. The widespread use of smart phones and internet services enables efficient digital delivery and mobility platforms. Significant investments by governments and businesses in infrastructure and smart city projects improve last-mile systems. Strong logistics networks and increasing consumer expectations for quick deliveries also support the region's leadership. Moreover, ongoing adoption of new technologies and innovative solutions enhances operational efficiency.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by widespread use of advanced technologies and well-developed logistics systems. The region sees strong demand from e-commerce and a growing need for faster delivery options. Businesses are investing in automation, AI-based solutions, and electric vehicles to enhance efficiency and sustainability. The involvement of leading companies and ongoing innovation in delivery approaches support market expansion. Favorable regulations and increased emphasis on smart transportation also aid growth.

Key players in the market

Some of the key players in Last-Mile Connectivity Market include Amazon Logistics, FedEx Corporation, United Parcel Service (UPS), Deutsche Post AG (DHL Group), DPD Group (Geopost), XPO Logistics, JD Logistics, ZTO Express, Yunda Express, Kerry Logistics Network Limited, Drone Delivery Canada Corp., A2Z Drone Delivery, LLC, DoorDash, Postmates (Uber), Glovo, Lalamove, Sendy and Ecom Express.

Key Developments:

In March 2026, FedEx is launching a same-day shipping program with last-mile Delivery Company OneRail, just after Amazon announced it will start offering quicker shipping times, CNBC has learned exclusively. The new partnership means customers now have a definite “by end-of-day offering,” according to Jason Brenner, FedEx’s senior vice president of digital.

In February 2026, DHL Group and Westwing are expanding their long-standing partnership to offer faster and more sustainable shipping. With DHL's GoGreen Plus service, Westwing deliveries are made with reduced transport-related greenhouse gas emissions. In addition, all Westwing shipments fulfilled by DHL exclusively use paper-based packaging materials, limiting the use of plastic. DHL is also handling a higher share of Westwing's parcel volume.

In February 2026, JD.com, Inc. and the Future Investment Initiative (FII) Institute announced a three-year strategic partnership to advance innovation, resilience, and digital transformation across global logistics and supply chains. The collaboration brings together FII Institute's global convening platform and investment ecosystem with JD.com's world-leading capabilities in advanced logistics, digital supply chain management, and smart infrastructure.

Transport Modes Covered:

Microtransit Services

Bike-Sharing Programs

Ride-Hailing Platforms

Corporate Mobility Shuttles

Demand Responsive Transit

Electrified Public Transit Extensions

Technologies Covered:

Smart Mobility Platforms

IoT Fleet Connectivity

AI Routing Engines

Battery Management Semiconductors

Advanced Materials

End Users Covered:

Urban Daily Commuters

Corporate Workforce Programs

E-Commerce & Logistics Operators

Government & Public Sector Projects

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

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

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

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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