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Micro-Mobility Market Forecasts to 2032 – Global Analysis By Vehicle Type (E-Kick Scooters, E-Bikes, Electric Mopeds/Motor Scooters, Non-Electric Bicycles, and Electric Skateboards & Hoverboards), Propulsion Type (Electric/Battery-Powered, Hybrid/Pedal-Assist, and Human-Powered), Sharing Model, Application, and By Geography

https://marketpublishers.com/r/M98FCC43C77FEN.html
Date: November 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: M98FCC43C77FEN

Abstracts

According to Stratistics MRC, the Global Micro-Mobility Market is accounted for $108.9 billion in 2025 and is expected to reach $332.9 billion by 2032, growing at a CAGR of 17.3% during the forecast period. The micro-mobility market encompasses small, lightweight transport options like e-scooters, e-bikes, pedal bikes, and shared micro-vehicles designed for first%- %and last-mile trips in urban areas. Services combine app-based access, docking or dockless models, and integrated mobility platforms to reduce congestion and emissions. City policies, safety regulations, and infrastructure like bike lanes influence deployment. Operators focus on fleet management, battery swapping, and profitability while addressing vandalism and curb space management.

Market Dynamics:

Driver:

Rapid urbanization and traffic congestion

Rapid urbanization and worsening traffic congestion are core drivers of the micro-mobility market, pushing commuters and cities toward compact, flexible transport solutions that ease last-mile travel. E-kick scooters and e-bikes shorten commute times

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for short trips, reduce car dependency, and free up curb and parking space, making them attractive to residents and planners. Additionally, municipal pilots, dedicated lanes, and public-private partnerships have lowered barriers to deployment, encouraging investment from operators and investors. Consequently, local jobs emerge across manufacturing, maintenance, logistics, operations, and software services rapidly.

Restraint:

High maintenance costs and short lifespan

High maintenance expenses and the relatively short operational lifespan of many micro-mobility assets constrain market profitability and scalability. Frequent repairs, battery degradation, and vandalism require ongoing expenditure for operators, increasing unit-economics pressure and raising per-ride prices. Moreover, inconsistent maintenance practices and limited local repair infrastructure can reduce vehicle availability and customer satisfaction, undermining retention. To sustain margins, firms need optimized fleet management, predictive maintenance, and improved hardware durability from manufacturers. Investments in modular design and standardized parts can lower lifecycle costs and downtime significantly.

Opportunity:

Integration with public transit systems

Integration with public transit offers a major growth opportunity for micro-mobility providers by improving first-mile and last-mile connectivity. Coordinated planning, unified ticketing, and strategically located parking hubs make scooters and bikes complementary to buses, trams, and metros, increasing overall public transit ridership. Additionally, data-sharing agreements enable better demand forecasting and dynamic allocation of fleets, while subsidies or procurement partnerships can reduce deployment risk for operators. Such integration supports sustainable urban mobility goals and expands ridership across diverse demographic groups. This drives longer-term contract opportunities.

Threat:

Intense competition among service providers leading to price wars

Intense competition among micro-mobility service providers, often driven by capital-

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backed expansions, increases the risk of sustained price wars that erode profitability. Operators may prioritize market share over unit economics, subsidizing rides to attract users and expand geographic coverage, which compresses margins. Furthermore, consolidation pressures and aggressive discounting can reduce service quality as fleets age without sufficient maintenance investment. Long-term sustainability depends on differentiation through technology, partnerships, and diversified revenue streams like advertisements and data services. Regulatory uncertainty can amplify these effects, raising investor caution further.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on micro-mobility. Initial lockdowns caused sharp ridership declines, but concerns about shared indoor transport and demand for socially distanced travel subsequently boosted short, solo trips on scooters and bikes. Operators adapted with contactless rentals, enhanced sanitization, and flexible rebalancing, while some companies paused services or restructured to conserve cash. Overall, the crisis accelerated operational resilience and highlighted micro-mobility's role in pandemic-era urban mobility strategies.

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

The E-kick scooters segment is expected to account for the largest market share during the forecast period due to their convenience and suitability for short urban trips. Compact design, ease of use, and low per-ride costs make them attractive for commuters, tourists, and delivery services. Operators favor scooters because they are easier to deploy, rebalance, and scale compared with larger vehicles, while manufacturers continue improving durability and battery efficiency. Municipal pilot programs and user familiarity further elevate adoption, creating strong demand that sustains fleet investments and aftermarket services.

The shared mobility services segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the shared mobility services segment is predicted to witness the highest growth rate as urban users increasingly prefer on-demand, pay-per-use transportation. Integration of ride-hailing, bike-share, and scooter fleets with platforms offering single-wallet payments and dynamic pricing drives adoption. Lower vehicle ownership costs, environmental considerations, and the convenience of flexible access attract diverse user groups, including commuters and visitors. Additionally, investments

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in fleet electrification and subscription models improve unit economics and support rapid geographic expansion. Municipal partnerships and transit integrations further accelerate market uptake.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by urban densification and evolving consumer preferences for access over ownership. Tech-enabled platforms that aggregate various micromobility modes simplify user journeys and increase the frequency of short trips. Economies of scale achieved through centralized operations, data-driven fleet optimization, and targeted promotions lower per-ride costs over time. As cities update infrastructure and regulations to accommodate shared modes, market penetration accelerates across metropolitan and suburban corridors.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to rapid urbanization, high population density, and growing middle-class demand for affordable mobility. Expanding smartphone penetration and favorable government initiatives supporting smart cities and electric mobility accelerate adoption. Local startups and multinational operators tailor solutions for price-sensitive consumers, while dense city layouts make short-distance trips ideal for micromobility. Collectively, these factors create an addressable market and strong growth momentum across multiple APAC markets.

Key players in the market

Some of the key players in Micro-Mobility Market include Bird Global, Inc., Neutron Holdings, Inc., Voi Technology AB, Dott BV, Spin, Inc., Bolt Technology O?, Segway-Ninebot Group Co., Ltd., Yulu Bikes Private Limited, Helbiz, Inc., Gogoro Inc., Niu Technologies Co., Ltd., Xiaomi Corporation, Uber Technologies, Inc., Lyft, Inc., and Accell Group N.V.

Key Developments:

In October 2025, Dott announced it raised €85 million via a €70M Nordic bond and a €15M Series-D extension to support growth.

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In October 2025, Voi announced deployment of 6,000 e-bikes in Paris starting October 1.

In October 2025, Dott announced it raised €85 million via a €70M Nordic bond and a €15M Series-D extension to support growth.

Vehicle Types Covered:

- E-Kick Scooters
- E-Bikes (Electric Bicycles)
- Electric Mopeds/Motor Scooters (Low Speed)
- Non-Electric/Traditional Bicycles
- Electric Skateboards and Hoverboards

Propulsion Types Covered:

- Electric/Battery-Powered
- Hybrid/Pedal-Assist
- Human-Powered

Sharing Models Covered:

- Shared Mobility Services
- Personal/Private Ownership

Applications Covered:

- First & Last Mile Connectivity

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- Short-Distance Commute/Leisure
- Commercial Use/Logistics
- Tourism

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India

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- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- 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

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- 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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List Of Tables

LIST OF TABLES

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24 Global Micro-Mobility Market Outlook, By Tourism (2024-2032) ($MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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