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Mobility-as-a-Service (MaaS) Market Forecasts to 2032 – Global Analysis By Service Type (Ride Hailing, Ride Sharing, Car Sharing, Bike Sharing, Shuttle Services, Microtransit and Public Transit Integration (Bus + Train)), Vehicle Type, Propulsion Type, Business Model, Payment Model, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Mobility-as-a-Service (MaaS) Market is accounted for $269.57 billion in 2025 and is expected to reach $2582.43 billion by 2032 growing at a CAGR of 38.1% during the forecast period. Mobility-as-a-Service (MaaS) represents a transformative approach to modern transportation, uniting diverse mobility options within a single, user-friendly digital platform. Through this system, travelers can conveniently plan, reserve, and pay for various transportation modes—such as public transit, shared rides, bike rentals, and on-demand vehicles—via one integrated app. MaaS emphasizes sustainability and accessibility, aiming to decrease reliance on private vehicles and improve traffic flow in urban centers. The rapid expansion of smartphone usage, secure online payment systems, and rising environmental consciousness are key factors fueling MaaS growth worldwide, redefining urban commuting and offering seamless, efficient, and connected travel experiences for daily users.

According to the European Commission, data from the EU-funded MaaS Alliance shows that integrated mobility services can reduce private car usage by up to 20% in urban areas, contributing to climate goals and congestion reduction.

Market Dynamics:

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Driver:

Increasing urbanization and traffic congestion

The steady rise in urbanization and vehicle density has intensified traffic congestion in major cities worldwide, creating a need for smarter mobility solutions. As urban populations expand, the pressure on existing transport infrastructure grows, prompting the shift toward integrated systems like Mobility-as-a-Service (MaaS). MaaS platforms combine diverse transport options—such as buses, trains, taxis, and shared vehicles—into a single digital interface, offering convenience and efficiency. City administrations increasingly support these models to reduce private car usage, curb pollution, and enhance transport accessibility. Therefore, growing metropolitan populations and urban transport challenges are key drivers boosting MaaS adoption for efficient, sustainable, and congestion-free mobility.

Restraint:

Data privacy and security concerns

Concerns over data protection and cybersecurity remain significant challenges to Mobility-as-a-Service (MaaS) development. MaaS systems handle sensitive information—such as users' locations, payment credentials, and travel patterns—making them potential targets for data breaches. Public apprehension about data misuse or exposure can discourage individuals from using integrated mobility platforms. Moreover, the absence of standardized privacy laws and uneven cybersecurity frameworks across nations intensify these risks. To gain user confidence, MaaS providers must ensure robust data encryption, transparent policies, and regulatory compliance. Without stringent security protocols, data vulnerabilities could undermine trust and slow the adoption of MaaS solutions in the global transportation ecosystem.

Opportunity:

Advancements in digital infrastructure and IoT

Ongoing progress in digital infrastructure and Internet of Things (IoT) innovations is unlocking new possibilities for the Mobility-as-a-Service (MaaS) sector. IoT facilitates seamless connectivity, real-time monitoring, and predictive analytics across transport networks, enhancing coordination between vehicles and service providers. The

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adoption of high-speed 5G, cloud computing, and big data analytics enables efficient communication and intelligent mobility management. These technologies empower MaaS platforms to offer customized, efficient, and responsive travel solutions to users. As smart infrastructure expands globally, it will enhance the scalability, interoperability, and reliability of MaaS systems, driving the transformation toward integrated, data-centric, and intelligent urban transportation ecosystems.

Threat:

Resistance from traditional transport providers

Opposition from conventional transport providers remains a significant challenge to the growth of the Mobility-as-a-Service (MaaS) market. Many traditional taxi firms, bus companies, and local transit agencies perceive MaaS as a disruptive threat to their established business models. This often results in limited data cooperation, regulatory lobbying, or refusal to integrate with digital mobility systems. Reluctance to adopt new technologies or share operational control further delays MaaS deployment. Such resistance reduces collaboration between public and private stakeholders, slowing innovation and system interoperability. Building trust, offering policy incentives, and fostering open partnerships are essential to encourage traditional operators to embrace MaaS-driven modernization.

Covid-19 Impact:

The Mobility-as-a-Service (MaaS) market was deeply affected by the COVID-19 pandemic, which disrupted urban transportation and altered commuter behavior. Restrictions on movement, lockdowns, and a rise in remote work drastically reduced the use of shared and public transport. Many MaaS companies faced financial strain due to decreased usage and suspended operations. Nevertheless, the pandemic accelerated digital transformation, emphasizing contactless payments, real-time monitoring, and flexible travel solutions. As economies recovered, demand for safe, hygienic, and adaptable mobility increased. The post-pandemic phase highlighted the importance of micro-mobility and personalized transport options, driving the evolution of more resilient and technology-enabled MaaS frameworks globally.

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

The ride hailing segment is expected to account for the largest market share during the forecast period owing to its high user convenience, digital integration, and broad

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availability. It serves as a key solution for urban travelers who prioritize flexibility, affordability, and quick access to transport services. Ride-hailing effectively complements public transit by offering seamless, on-demand mobility with features such as real-time tracking, digital payments, and route optimization. The increasing penetration of smart phones and location-based apps has accelerated its global adoption. Moreover, collaborations between ride-hailing providers and MaaS operators promote system-wide connectivity, positioning ride-hailing as a central element in building efficient, sustainable, and user-centric urban mobility networks.

The two-wheelers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the two-wheelers segment is predicted to witness the highest growth rate, driven by their convenience, cost-effectiveness, and adaptability for short urban commutes. Electric bikes, scooters, and mopeds have become vital components of MaaS ecosystems, offering sustainable and quick last-mile travel options. Their compact size and energy efficiency make them ideal for navigating congested city streets. Increasing environmental awareness and the expansion of shared micro-mobility programs are further accelerating adoption. Supported by continuous improvements in battery performance and charging infrastructure, two-wheelers provide a practical, affordable, and eco-friendly mobility solution, positioning the segment as a key driver of MaaS market growth globally.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share due to its progressive transport systems, supportive government frameworks, and strong emphasis on sustainability. The region has led the global transition toward integrated, digitally connected mobility platforms that merge various transport modes into unified networks. European nations such as Germany, the UK, and the Netherlands actively promote MaaS through smart city projects, public-private partnerships, and eco-friendly policies. The combination of advanced infrastructure, environmental awareness, and extensive electric vehicle adoption supports steady market expansion. Europe’s proactive stance on innovation and regulation makes it a global leader in developing efficient, user-centric, and sustainable MaaS ecosystems.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest

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CAGR, owing to urban expansion, technological progress, and supportive policy initiatives. Nations such as India, China, Japan, and South Korea are investing heavily in digital mobility systems to enhance connectivity and reduce congestion. The region's strong smartphone penetration, expanding transport infrastructure, and rising environmental consciousness are key enablers of this growth. Governments promoting electric and shared mobility through smart city programs further strengthen adoption. With a vast and tech-savvy population, Asia-Pacific is rapidly emerging as a global leader in sustainable, accessible, and technology-driven MaaS solutions for modern urban transport.

Key players in the market

Some of the key players in Mobility-as-a-Service (MaaS) Market include Uber Technologies Inc., Lyft, Inc., Didi Chuxing Technology Co., ANI Technologies Pvt. Ltd., Grab, Shuttl, BMW Group, Moovel Group GmbH, Moovit Inc., Citymapper Limited, BlaBlaCar, Car2go NA, LLC, Ola Electric Mobility Pvt Ltd., Zoox, Inc. and Careem Inc.

Key Developments:

In May 2025, Uber Technologies, Inc. and Momenta announced a strategic agreement to introduce autonomous vehicles to the Uber platform, in international markets outside of the US and China. First deployment for the partnership will take place in Europe at the beginning of 2026, with onboard safety operators.

In April 2025, Lyft, Inc. announced it has entered into a definitive agreement to acquire FREENOW, a leading European multi-mobility app with a taxi offering at its core, from BMW Group and Mercedes-Benz Mobility for approximately €175 million or $197 million* in cash.

In February 2025, BMW Group Expands Global Partnership with Axalta for Automotive Refinish Coatings. The agreement strengthens Axalta's existing relationship with BMW Group, as the company maintains its position as the exclusive ColorSystem supplier in Europe and South Africa, while extending its ColorSystem supply agreements in the United States and China.

Service Types Covered:

Ride Hailing

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- Ride Sharing
- Car Sharing
- Bike Sharing
- Shuttle Services
- Microtransit
- Public Transit Integration (Bus + Train)

Vehicle Types Covered:

- Two-Wheelers
- Passenger Cars
- Multi-Passenger Vehicles
- Public Transit Vehicles

Propulsion Types Covered:

- Internal Combustion Engine (ICE)
- Battery Electric (BEV)
- Hybrid Electric (HEV)
- Fuel Cell Electric (FCEV)

Business Models Covered:

- B2C (Business-to-Consumer)

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B2B (Business-to-Business)

P2P (Peer-to-Peer)

Payment Models Covered:

Subscription-Based

Pay-as-You-Go

Bundled Mobility Packages

Applications Covered:

First and Last Mile Connectivity

Daily Urban Commuting

Intercity Travel

Airport Transfers

Tourism & Leisure Mobility

End Users Covered:

Individual Consumers

Corporate Clients

Municipal/Government Agencies

Regions Covered:

North America

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- US
- Canada
- Mexico

Europe

- Germany
- UK
- 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
- Supply chain trends mapping the latest technological advancements

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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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