

Mobility?Focused Real?Estate and Transit?Oriented Design Market Forecasts to 2034 – Global Analysis By Property Type (Residential-Led Developments, Commercial-Led Developments, Mixed-Use Integrated Developments and Public/Institutional Developments), Transit Mode and By Geography

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Abstracts

According to Statistics MRC, the Global Mobility?Focused Real?Estate and Transit?Oriented Design Market is accounted for \$4.6 billion in 2026 and is expected to reach \$7.9 billion by 2034 growing at a CAGR of 6.95% during the forecast period. Mobility-Focused Real-Estate and Transit-Oriented Design concentrate on building compact, multifunctional neighborhoods around reliable public transport corridors. It combines housing, offices, retail outlets, and leisure facilities near transit stations to encourage walking and reduce car usage. By improving pedestrian access, bike lanes, and links to mass transit systems, these projects strengthen connectivity and convenience. Such planning not only decreases environmental impact but also boosts local economies through higher land demand and commercial activity. Overall, this strategy promotes sustainable city growth, eases road congestion, and creates dynamic communities designed for efficient daily movement and integrated urban living.

According to CBRE Research (2025), India's urban sprawl is leading to longer commutes, higher private vehicle usage, and worsening pollution. By 2030, 600 million people are expected to live in Indian cities, making TOD critical to reduce commute times and integrate housing with transport hubs.

Market Dynamics:

Driver:

Urbanization and population density growth

Increasing urban migration and escalating population concentration significantly propel the Mobility-Focused Real-Estate and Transit-Oriented Design market. As metropolitan regions become more crowded, traditional infrastructure models struggle to support mobility and housing demands. Compact development clustered around transportation networks provides a practical solution to uncontrolled expansion. Integrating housing, retail, and workplaces near transit stations improves land efficiency and shortens travel times. This strategy mitigates congestion, enhances connectivity, and ensures better resource allocation. As a result, policymakers and real estate developers are actively investing in transit-centered communities to sustainably address demographic expansion and modern urban living requirements.

Restraint:

High initial development and infrastructure costs

Elevated startup expenses act as a key barrier to growth in the Mobility-Focused Real-Estate and Transit-Oriented Design market. Projects near transit corridors demand significant funding for land procurement, regulatory clearances, and transport integration. Advanced infrastructure features such as pedestrian-friendly layouts and shared mobility facilities further raise construction budgets. Lengthy coordination with government agencies can also increase costs and delays. These financial pressures discourage smaller investors and restrict broader market entry. Consequently, heavy capital commitments remain a primary obstacle limiting expansion and implementation of transit-centered real estate developments.

Opportunity:

Rising demand for mixed-use developments

The growing appeal of integrated urban spaces provides promising prospects for the Mobility-Focused Real-Estate and Transit-Oriented Design market. Consumers increasingly prefer locations that blend living, working, and leisure facilities near transport connections. Transit-centered projects naturally support such multifunctional planning concepts. These developments optimize land efficiency and encourage vibrant local economies. Property owners benefit from diversified income sources across

residential and commercial segments. As compact city planning gains momentum, the appetite for well-connected, mixed-use neighborhoods strengthens, opening new avenues for developers and investors.

Threat:

Shifts toward remote and hybrid work models

The growing acceptance of flexible work structures presents a considerable risk to the Mobility-Focused Real-Estate and Transit-Oriented Design market. With fewer employees traveling daily to workplaces, transit ridership and office demand may decrease. Lower commuter volumes can reduce business activity near transport hubs, affecting mixed-use project revenues. As traditional commuting patterns evolve, the financial viability of high-density developments linked to transit systems may weaken. Prolonged reliance on remote employment could discourage long-term investments and slow expansion of mobility-focused real estate initiatives.

Covid-19 Impact:

The outbreak of COVID-19 had a profound effect on the Mobility-Focused Real-Estate and Transit-Oriented Design market, primarily through reduced transit usage and stalled development activities. Work-from-home practices and mobility restrictions lowered commuter traffic, diminishing demand for commercial properties around transportation centers. Project delays emerged from workforce disruptions and material supply constraints, raising overall development expenses. Economic volatility further weakened short-term investment activity. Despite these setbacks, the crisis underscored the value of self-sufficient, pedestrian-friendly neighborhoods with integrated services, ultimately encouraging renewed strategic focus on adaptable and sustainable transit-oriented urban planning.

The mixed-use integrated developments segment is expected to be the largest during the forecast period

The mixed-use integrated developments segment is expected to account for the largest market share during the forecast period because they merge housing, offices, retail outlets, and social spaces around transit nodes. This multifunctional structure optimizes urban land use and fosters dynamic, interconnected neighborhoods. Continuous activity throughout the day enhances commercial viability and residential attractiveness. The ability to accommodate diverse user needs makes these projects highly resilient to

market fluctuations. Their alignment with sustainable mobility and compact city planning principles reinforces their prominence, establishing mixed-use developments as the leading segment in transit-oriented real estate initiatives.

The emerging mobility-linked developments segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the emerging mobility-linked developments segment is predicted to witness the highest growth rate. Their expansion is fueled by the increasing adoption of electric transport, autonomous vehicles, ride-sharing networks, and integrated mobility services. These projects incorporate future-ready features including charging infrastructure, shared transport hubs, and smart connectivity systems. The capacity to accommodate next-generation mobility trends enhances their long-term investment appeal. With urban areas prioritizing technological innovation and sustainable transit models, developments connected to new mobility solutions are rapidly advancing and driving significant market acceleration.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to accelerating urban expansion and significant investments in mass transit systems. Countries including China, Japan, South Korea, and India are prioritizing compact, transit-connected urban planning to accommodate rising populations. Large-scale rail networks, modernization projects, and supportive policy frameworks drive sustained development activity. The preference for high-density, mixed-use neighborhoods near transportation hubs boosts regional market strength. Ongoing infrastructure enhancement and strategic city planning initiatives reinforce Asia-Pacific's leading position in mobility-centered real estate growth.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa region is anticipated to exhibit the highest CAGR due to extensive urban modernization strategies and expanding public transport systems. Nations including the UAE and Saudi Arabia are investing heavily in rail networks, smart mobility infrastructure, and integrated urban communities. Economic diversification efforts and increasing urban populations support rising demand for transit-oriented properties. Public-private partnerships and supportive planning policies further enhance development momentum, establishing the region as the most rapidly advancing market for mobility-focused real estate projects.

Key players in the market

Some of the key players in Mobility-Focused Real-Estate and Transit-Oriented Design Market include MobilityRE, McCormick Taylor, MARTA TOD, TOD Properties, Arcadis, Burk & Company, Visionarch, WSP, Torti Gallas, INI Design Studio, Mobility Developers, HOK, Perkins&Will, Skidmore Owings & Merrill, Calthorpe Associates, AECOM, Jacobs and Kimley-Horn.

Key Developments:

In July 2025, AECOM announced a strategic partnership with Special Integrated Logistics Zones Company (SILZ), the Kingdom of Saudi Arabia's premier developer and operator of integrated logistics zones. This partnership is designed to accelerate Saudi Arabia's emergence as a global integrated logistics leader, aligning with Saudi Vision 2030's goals of economic diversification, sustainable development, and enhanced global trade integration.

In June 2025, Jacobs, in joint venture with AtkinsRalis, has been appointed by National Highways in the U.K. to provide essential environmental and sustainability technical services to support the organization's strategy to reduce carbon emissions, enhance biodiversity and climate resilience, and support community wellbeing.

Property Types Covered:

Residential-Led Developments

Commercial-Led Developments

Mixed-Use Integrated Developments

Public/Institutional Developments

Transit Modes Covered:

Metro/Subway-Linked Developments

Bus Rapid Transit (BRT) Corridor Developments

Light Rail & Commuter Rail Hub Developments

Multimodal Integration Hubs

Emerging Mobility-Linked Developments

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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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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