

# **Shared E-Fleet Management and Subscription Mobility Market Forecasts to 2034 – Global Analysis By Vehicle Type (Electric Cars, Electric Two-Wheelers, Electric Three-Wheelers, Electric Buses & Shuttles and Light Commercial EVs), Service Model, Fleet Management Function, End User and By Geography**

<https://marketpublishers.com/r/SA1CE497242FEN.html>

Date: March 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: SA1CE497242FEN

## **Abstracts**

According to Statistics MRC, the Global Shared E-Fleet Management and Subscription Mobility Market is accounted for \$406.5 billion in 2026 and is expected to reach \$1454.9 billion by 2034 growing at a CAGR of 17.2% during the forecast period. Shared electric fleet management combined with subscription-based mobility is transforming how transportation services are delivered. Through advanced digital platforms, companies can supervise electric vehicle fleets by tracking charging activities, vehicle performance, route efficiency, and maintenance needs. Subscription mobility offers consumers and businesses the option to use vehicles through recurring plans instead of purchasing them, making access more flexible and affordable. With the support of telematics, analytics, and smart charging coordination, these platforms enhance fleet productivity, reduce operating expenses, and promote the growth of electrified mobility solutions within modern transportation networks.

According to the Arval Mobility Observatory Fleet & Mobility Barometer 2024, electrification momentum continues strongly in corporate fleets, with increased confidence in shared fleet management and subscription-based mobility solutions. The survey covered over 8,600 corporate decision-makers across 30 countries, highlighting rising adoption of connected vehicle data and subscription mobility models.

## **Market Dynamics:**

**Driver:**

Rising adoption of electric vehicles in shared mobility fleets

The increasing integration of electric vehicles within shared transportation services is significantly contributing to the growth of the Shared E-Fleet Management and Subscription Mobility Market. Mobility providers are transitioning from traditional fuel-powered vehicles to electric alternatives to decrease operational expenses and meet stricter environmental standards. Supportive government initiatives such as financial incentives, grants, and charging infrastructure development further encourage EV deployment. As cities move toward cleaner mobility systems, the expansion of electric vehicle fleets in shared services drives the need for sophisticated fleet management solutions and subscription-based transportation models.

**Restraint:**

High initial investment for electric fleet infrastructure

The substantial capital required to deploy electric fleet systems presents a key challenge for the Shared E-Fleet Management and Subscription Mobility Market. Companies must allocate considerable funds to purchase electric vehicles, install charging stations, and implement advanced fleet management technologies. Building dependable charging infrastructure and integrating energy monitoring platforms can significantly raise operational expenses. For smaller mobility operators, securing the financial resources needed for such investments may be difficult. These investment challenges can delay the development and expansion of shared electric mobility services and subscription-based transportation models.

**Opportunity:**

Integration with smart city and sustainable mobility initiatives

The growing development of smart cities and environmentally responsible transportation programs creates strong opportunities for the Shared E-Fleet Management and Subscription Mobility Market. Governments and urban planners are increasingly promoting digital mobility systems that reduce pollution and improve transportation efficiency. Shared electric fleets support these goals by optimizing vehicle usage and providing sustainable travel options for urban populations. Mobility companies can

partner with city administrations to integrate electric fleets into broader urban transport networks. As smart infrastructure and connected mobility services continue to evolve, demand for shared fleet management platforms and subscription-based mobility solutions is likely to grow steadily.

**Threat:**

Intense competition from traditional mobility and ride-hailing services

Competition from conventional transportation options and popular ride-hailing platforms represents a major challenge for the Shared E-Fleet Management and Subscription Mobility Market. Many users continue to depend on private vehicles, taxis, or well-established ride-hailing services that provide convenient and widely accessible transportation. These competitors benefit from strong market recognition, large customer bases, and established operational infrastructure. New mobility providers offering shared electric fleets or subscription-based services may find it difficult to capture significant market share. In addition, intense price competition and the need to continuously improve service quality can increase operational pressure, affecting profitability and long-term market sustainability.

**Covid-19 Impact:**

The outbreak of COVID-19 created both challenges and new opportunities for the Shared E-Fleet Management and Subscription Mobility Market. In the early phases of the crisis, restrictions on movement, reduced commuting, and strict lockdown measures caused a sharp decline in shared mobility usage. Several fleet operators scaled back operations as demand for transportation dropped. Despite this slowdown, the pandemic encouraged interest in flexible and contactless mobility services. Consumers and businesses began considering subscription mobility models as alternatives to traditional public transport and vehicle ownership. As economic activities resumed, the market started recovering with stronger emphasis on electric fleets, digital fleet management systems, and sustainable mobility solutions.

The electric cars segment is expected to be the largest during the forecast period

The electric cars segment is expected to account for the largest market share during the forecast period because they are widely utilized in shared transportation and subscription mobility programs. Mobility service providers favor electric cars due to their practicality, passenger capacity, and adaptability across different service models

including ride-hailing, car-sharing, and corporate transport services. These vehicles integrate easily with charging networks and digital fleet management systems, enabling smooth operational management. Their suitability for daily urban travel further strengthens their adoption among shared mobility operators. With increasing emphasis on sustainable transportation and flexible mobility services, electric cars continue to dominate shared electric fleet deployments.

The logistics & delivery companies segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the logistics & delivery companies segment is predicted to witness the highest growth rate as online retail and urban distribution activities continue to expand rapidly. These companies are increasingly adopting shared electric fleets to enhance operational efficiency while reducing transportation costs and carbon emissions. Electric vehicles are particularly effective for last-mile delivery tasks and frequent short-distance routes within cities. Fleet management platforms enable companies to track vehicles, plan optimized delivery routes, and manage charging operations efficiently. With the rising demand for sustainable and timely delivery services, logistics providers are progressively adopting subscription-based electric fleet solutions.

### **Region with largest share:**

During the forecast period, the Asia Pacific region is expected to hold the largest market share, supported by rising urban populations and the rapid development of electric mobility ecosystems. Governments across the region are encouraging electric vehicle adoption through incentives, policy support, and infrastructure development. Increasing demand for convenient and flexible transportation solutions in densely populated cities has accelerated the use of shared electric fleets and subscription mobility services. The region also benefits from strong participation by electric vehicle manufacturers and mobility technology providers.

### **Region with highest CAGR:**

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, supported by rising electric vehicle adoption and increasing investments in digital mobility technologies. Organizations and mobility providers in the region are actively adopting flexible transportation models that focus on sustainability and operational efficiency. Significant investments in charging networks, electrified fleets,

and connected mobility platforms are strengthening market expansion. Furthermore, the strong presence of technology companies and innovative mobility start-ups is enabling the development of advanced fleet management solutions.

### **Key players in the market**

Some of the key players in Shared E-Fleet Management and Subscription Mobility Market include Joyride, Levy Fleets, Atom Mobility, Wunder Mobility, ElectricFeel, Good Travel Software (GTS), Moqo, ScootAPI, Urban Sharing, SharingOS, Geotab, Samsara, Verizon Connect, Webfleet / TomTom Telematics, Fleet Complete, Omnitracs, Teletrac Navman and Ridecell.

### **Key Developments:**

In December 2025, Geotab Inc. announced a significant expansion of its cooperative purchasing contracts with Sourcewell and Canoe Procurement Group. The contracts now include four innovative solutions: the GO Focus, the GO Focus Plus, the GO Anywhere asset tracker, and the Altitude by Geotab data analytics platform.

In June 2025, Samsara Inc. and Element Fleet Management Corp. announced a holistic fleet and operations management offering. This joint offering streamlines procurement and onboarding for shared customers, delivering greater safety and efficiency through the combined power of product solutions—far beyond traditional telematics.

### **Vehicle Types Covered:**

Electric Cars

Electric Two-Wheelers

Electric Three-Wheelers

Electric Buses & Shuttles

Light Commercial EVs

### **Service Models Covered:**

Subscription Services

Usage-Based Services

Organizational Services

**Fleet Management Functions Covered:**

Vehicle Tracking & Telematics

Charging Infrastructure Management

Predictive Maintenance & Diagnostics

Route Optimization & Scheduling

Driver & User Experience Management

**End Users Covered:**

Corporate Enterprises

Universities & Campus Mobility Networks

Municipal/Public Transport Authorities

Logistics & Delivery Companies

Individual Subscribers

**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

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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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