

Shared Electric Scooter Market Forecasts to 2034 – Global Analysis By Scooter Type (Standing Electric Scooters, Seated Electric Scooters, Foldable Electric Scooters, and Non-Foldable Electric Scooters), Battery Type, Operational Model, Ownership Model, Charging Infrastructure, End User and By Geography

<https://marketpublishers.com/r/S94DC7CE2D3AEN.html>

Date: July 2026

Pages: 200

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

ID: S94DC7CE2D3AEN

Abstracts

According to Statistics MRC, the Global Shared Electric Scooter Market is accounted for \$3.8 billion in 2026 and is expected to reach \$9.4 billion by 2034, growing at a CAGR of 12.1% during the forecast period. Shared electric scooters are dockless or docked two-wheeled electric vehicles made available to users on a short-term rental basis through mobile applications. These platforms allow riders to locate, unlock, and return scooters at designated or flexible locations across urban areas. Operating on battery-powered motors, shared e-scooters support first- and last-mile connectivity, reducing dependence on personal vehicles and public transit congestion. Operators manage fleets using GPS tracking, IoT connectivity, and data analytics to optimize vehicle availability, battery swapping, and maintenance schedules, enhancing urban mobility efficiency.

Market Dynamics:

Driver:

Rising demand for sustainable urban last-mile transportation solutions

Rapid urban population growth and worsening traffic congestion are compelling city governments and commuters to adopt cleaner, more agile mobility solutions. Shared

electric scooters address first- and last-mile connectivity gaps that conventional public transit cannot efficiently serve. Municipal authorities across Europe, Asia Pacific, and North America are integrating micro-mobility into broader smart city frameworks by allocating dedicated infrastructure lanes and offering subsidized deployment licenses. As environmental regulations tighten and carbon neutrality targets gain urgency, shared e-scooter platforms represent an economically viable and ecologically sound alternative, accelerating fleet expansion and platform investment across both developed and emerging urban markets.

Restraint:

Regulatory uncertainty and vandalism-related fleet management challenges

The shared electric scooter industry faces substantial operational headwinds stemming from inconsistent regulatory environments across municipalities. Licensing requirements, speed restrictions, permitted riding zones, and helmet mandates vary significantly between cities and countries, creating compliance complexity for platform operators expanding internationally. Additionally, fleet vandalism, misuse, and improper parking trigger costly repairs and penalty fines, elevating per-unit operating costs. High battery replacement expenses, combined with the logistical burden of manual recharging operations, further compress operator margins. These systemic challenges restrict profitability and deter smaller players from achieving scale.

Opportunity:

Integration with multimodal public transit ecosystems and MaaS platforms

Strategic partnerships between shared e-scooter operators and public transit agencies are unlocking powerful Mobility-as-a-Service opportunities. By embedding scooter-sharing options within transit apps and payment systems, operators can capture commuters who require flexible first- and last-mile solutions. Smart city initiatives in Singapore, Amsterdam, and Paris are actively financing interoperable mobility hubs where shared scooters connect seamlessly with metro and bus networks. As 5G infrastructure expands, real-time fleet optimization powered by AI and predictive analytics will further enhance service reliability, creating a compelling value proposition for both riders and municipal partners.

Threat:

Fleet safety incidents and liability concerns undermining platform credibility

Recurring accident reports involving shared e-scooter riders have intensified public scrutiny and drawn regulatory backlash in several key markets. Collisions, pavement obstruction, and rider injuries create negative media coverage that erodes consumer trust and motivates municipalities to impose restrictive usage bans or fleet caps. Insurance costs are rising as platforms absorb greater liability exposure. Competing micro-mobility formats such as shared e-bikes and autonomous delivery pods are also vying for the same urban mobility budget, increasing competitive pressure on operators to justify safety investments while maintaining affordable pricing and fleet profitability.

Covid-19 Impact:

The COVID-19 pandemic initially disrupted the shared electric scooter market as lockdowns halted commuter activity and city-wide mobility ground to a standstill, forcing operators to suspend services and furlough fleet maintenance teams. However, as restrictions eased, demand rebounded sharply, fueled by commuters seeking low-contact, open-air transportation alternatives to crowded buses and metros. The crisis accelerated app-based contactless payment adoption and prompted cities to expand cycling and micro-mobility infrastructure. Post-pandemic urban mobility planning now routinely incorporates shared e-scooters as a core component, supporting sustained market recovery and long-term fleet investment.

The Standing Electric Scooters segment is expected to be the largest during the forecast period

The standing electric scooters segment commands the dominant position in the market throughout the forecast period. This segment's leadership is attributable to its widespread adoption across urban commuter demographics, particularly for short-distance travel. Standing designs offer a compact form factor that facilitates easy parking and fleet management, while their lower manufacturing cost per unit enables operators to maintain large, cost-effective fleets. Continuous improvements in motor efficiency and battery longevity have reinforced consumer preference for standing configurations across European and Asia Pacific markets.

The Foldable Electric Scooters segment is expected to have the highest CAGR during the forecast period

The foldable electric scooters segment is anticipated to register the highest growth rate

over the forecast period, propelled by growing consumer demand for portable, multimodal-compatible micro-mobility devices. Foldable designs allow riders to carry scooters aboard trains, buses, and ride-share vehicles, enabling door-to-door journey completion without dependence on dedicated parking infrastructure. As urban workers seek flexible commuting tools that integrate with hybrid work schedules, the portability of foldable scooters positions this segment as the fastest-expanding category in both individual ownership and sharing platform deployments.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, underpinned by pioneering micro-mobility adoption in cities such as San Francisco, Austin, and Washington D.C. A permissive regulatory environment, advanced digital payment infrastructure, and high smartphone penetration facilitate platform scalability. Major operators have forged strategic agreements with municipal transportation authorities, embedding shared scooters within multimodal transit plans. Sustained venture capital investment and consumer familiarity with app-based mobility services further entrench North America's market leadership position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid urbanization, acute traffic congestion, and strong government policy support for electric micro-mobility in China, India, and Southeast Asian nations. China's vast urban population and existing e-scooter manufacturing ecosystem create a natural launchpad for platform expansion, while India's growing startup ecosystem is deploying shared fleet solutions across Tier I and Tier II cities. Favorable subsidy frameworks and smart city investment programs across the region are catalyzing accelerated fleet growth.

Key players in the market

Some of the key players in Shared Electric Scooter Market include Lime, Dott, Voi Technology, Bolt, Neuron Mobility, Beam Mobility, Bird, Helbiz, GO Sharing, Cityscoot, Revel Transit, Cooltra, Yulu, Gogoro, and Ryde Group.

Key Developments:

In March 2026, Lime announced the expansion of its European fleet operations

with the deployment of its next-generation Gen 4.1 scooter model across 12 new cities in Germany, Spain, and Poland. The upgraded model incorporates a swappable battery architecture, extending operational range by 35% and reducing per-trip fleet charging costs significantly.

In January 2026, Voi Technology secured a €50 million Series E funding round led by existing investors to accelerate fleet electrification and expand its proprietary AI-powered fleet optimization platform. The funds will support entry into five additional European markets and the development of autonomous scooter rebalancing pilot programs.

Scooter Types Covered:

- Standing Electric Scooters

- Seated Electric Scooters

- Foldable Electric Scooters

- Non-Foldable Electric Scooters

Battery Types Covered:

- Lithium-Ion Batteries

- Lithium Iron Phosphate (LFP) Batteries

- Lead-Acid Batteries

- Other Battery Types

Operational Models Covered:

- Dockless Scooter Sharing

- Docked Scooter Sharing

Hybrid Sharing Model

Ownership Models Covered:

Operator-Owned Fleet

Franchise-Based Fleet

Public-Private Partnership (PPP) Model

Charging Infrastructures Covered:

Battery Swapping

Plug-in Charging

Solar-Assisted Charging

Smart Charging Systems

End Users Covered:

Daily Commuters

Students

Tourists

Corporate Users

Leisure Riders

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:

Shared Electric Scooter Market Forecasts to 2034 – Global Analysis By Scooter Type (Standing Electric Scooters...

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

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY SCOOTER TYPE

- 5.1 Standing Electric Scooters
- 5.2 Seated Electric Scooters
- 5.3 Foldable Electric Scooters
- 5.4 Non-Foldable Electric Scooters

6 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY BATTERY TYPE

- 6.1 Lithium-Ion Batteries
- 6.2 Lithium Iron Phosphate (LFP) Batteries
- 6.3 Lead-Acid Batteries
- 6.4 Other Battery Types

7 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY OPERATIONAL MODEL

- 7.1 Dockless Scooter Sharing
- 7.2 Docked Scooter Sharing
- 7.3 Hybrid Sharing Model

8 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY OWNERSHIP MODEL

- 8.1 Operator-Owned Fleet
- 8.2 Franchise-Based Fleet
- 8.3 Public-Private Partnership (PPP) Model

9 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY CHARGING INFRASTRUCTURE

- 9.1 Battery Swapping
- 9.2 Plug-in Charging
- 9.3 Solar-Assisted Charging
- 9.4 Smart Charging Systems

10 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY END USER

- 10.1 Daily Commuters
- 10.2 Students
- 10.3 Tourists
- 10.4 Corporate Users
- 10.5 Leisure Riders

11 GLOBAL SHARED ELECTRIC SCOOTER MARKET, BY GEOGRAPHY

- 11.1 North America
 - 11.1.1 United States
 - 11.1.2 Canada
 - 11.1.3 Mexico
- 11.2 Europe
 - 11.2.1 United Kingdom
 - 11.2.2 Germany
 - 11.2.3 France
 - 11.2.4 Italy
 - 11.2.5 Spain
 - 11.2.6 Netherlands
 - 11.2.7 Belgium
 - 11.2.8 Sweden
 - 11.2.9 Switzerland
 - 11.2.10 Poland
 - 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea
 - 11.3.5 Australia
 - 11.3.6 Indonesia
 - 11.3.7 Thailand
 - 11.3.8 Malaysia
 - 11.3.9 Singapore
 - 11.3.10 Vietnam
 - 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil

- 11.4.2 Argentina
- 11.4.3 Colombia
- 11.4.4 Chile
- 11.4.5 Peru
- 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia
 - 11.5.1.2 United Arab Emirates
 - 11.5.1.3 Qatar
 - 11.5.1.4 Israel
 - 11.5.1.5 Rest of Middle East
 - 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments
- 13.5 Other Strategic Initiatives

14 COMPANY PROFILES

- 14.1 Lime
- 14.2 Dott
- 14.3 Voi Technology
- 14.4 Bolt

- 14.5 Neuron Mobility
- 14.6 Beam Mobility
- 14.7 Bird
- 14.8 Helbiz
- 14.9 GO Sharing
- 14.10 Cityscoot
- 14.11 Revel Transit
- 14.12 Cooltra
- 14.13 Yulu
- 14.14 Gogoro
- 14.15 Ryde Group

List Of Tables

LIST OF TABLES

Table 1 Global Shared Electric Scooter Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Shared Electric Scooter Market Outlook, By Scooter Type (2023-2034) (\$MN)

Table 3 Global Shared Electric Scooter Market Outlook, By Standing Electric Scooters (2023-2034) (\$MN)

Table 4 Global Shared Electric Scooter Market Outlook, By Seated Electric Scooters (2023-2034) (\$MN)

Table 5 Global Shared Electric Scooter Market Outlook, By Foldable Electric Scooters (2023-2034) (\$MN)

Table 6 Global Shared Electric Scooter Market Outlook, By Non-Foldable Electric Scooters (2023-2034) (\$MN)

Table 7 Global Shared Electric Scooter Market Outlook, By Battery Type (2023-2034) (\$MN)

Table 8 Global Shared Electric Scooter Market Outlook, By Lithium-Ion Batteries (2023-2034) (\$MN)

Table 9 Global Shared Electric Scooter Market Outlook, By Lithium Iron Phosphate (LFP) Batteries (2023-2034) (\$MN)

Table 10 Global Shared Electric Scooter Market Outlook, By Lead-Acid Batteries (2023-2034) (\$MN)

Table 11 Global Shared Electric Scooter Market Outlook, By Other Battery Types (2023-2034) (\$MN)

Table 12 Global Shared Electric Scooter Market Outlook, By Operational Model (2023-2034) (\$MN)

Table 13 Global Shared Electric Scooter Market Outlook, By Dockless Scooter Sharing (2023-2034) (\$MN)

Table 14 Global Shared Electric Scooter Market Outlook, By Docked Scooter Sharing (2023-2034) (\$MN)

Table 15 Global Shared Electric Scooter Market Outlook, By Hybrid Sharing Model (2023-2034) (\$MN)

Table 16 Global Shared Electric Scooter Market Outlook, By Ownership Model (2023-2034) (\$MN)

Table 17 Global Shared Electric Scooter Market Outlook, By Operator-Owned Fleet (2023-2034) (\$MN)

Table 18 Global Shared Electric Scooter Market Outlook, By Franchise-Based Fleet (2023-2034) (\$MN)

Table 19 Global Shared Electric Scooter Market Outlook, By Public-Private Partnership (PPP) Model (2023-2034) (\$MN)

Table 20 Global Shared Electric Scooter Market Outlook, By Charging Infrastructure (2023-2034) (\$MN)

Table 21 Global Shared Electric Scooter Market Outlook, By Battery Swapping (2023-2034) (\$MN)

Table 22 Global Shared Electric Scooter Market Outlook, By Plug-in Charging (2023-2034) (\$MN)

Table 23 Global Shared Electric Scooter Market Outlook, By Solar-Assisted Charging (2023-2034) (\$MN)

Table 24 Global Shared Electric Scooter Market Outlook, By Smart Charging Systems (2023-2034) (\$MN)

Table 25 Global Shared Electric Scooter Market Outlook, By End User (2023-2034) (\$MN)

Table 26 Global Shared Electric Scooter Market Outlook, By Daily Commuters (2023-2034) (\$MN)

Table 27 Global Shared Electric Scooter Market Outlook, By Students (2023-2034) (\$MN)

Table 28 Global Shared Electric Scooter Market Outlook, By Tourists (2023-2034) (\$MN)

Table 29 Global Shared Electric Scooter Market Outlook, By Corporate Users (2023-2034) (\$MN)

Table 30 Global Shared Electric Scooter Market Outlook, By Leisure Riders (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

I would like to order

Product name: Shared Electric Scooter Market Forecasts to 2034 – Global Analysis By Scooter Type (Standing Electric Scooters, Seated Electric Scooters, Foldable Electric Scooters, and Non-Foldable Electric Scooters), Battery Type, Operational Model, Ownership Model, Charging Infrastructure, End User and By Geography

Product link: <https://marketpublishers.com/r/S94DC7CE2D3AEN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S94DC7CE2D3AEN.html>