

Shared & On-Demand Mobility Market Forecasts to 2032 – Global Analysis By Service Type (Ride-Hailing, Car Sharing, Bike Sharing, Scooter Sharing, Microtransit Services and Public Transit Integration Platforms), Vehicle Type, Business Model, Propulsion Type, Commute Type, Autonomy Level, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Shared & On-Demand Mobility Market is accounted for \$346.61 billion in 2025 and is expected to reach \$1078.18 billion by 2032 growing at a CAGR of 17.6% during the forecast period. Shared and on-demand mobility is reshaping city transportation by providing adaptable, affordable, and eco-friendly alternatives to private car use. Solutions like ride-hailing, carpooling, bike-sharing, and e-scooter services enable users to access transport only when required, helping reduce traffic jams and emissions. Mobile applications and smart phones simplify instant bookings, payments, and efficient routing. City planners are increasingly incorporating these mobility services into public transit networks to improve last-mile access. Rising environmental consciousness, fuel prices, and urban congestion are driving global demand for shared and on-demand transport options, contributing to smarter, greener, and more convenient urban mobility for residents and commuters alike.

According to the International Transport Forum (OECD), shared mobility services—such as ride-hailing, car-sharing, and microtransit—can reduce total vehicle kilometers traveled by up to 30% when integrated with public transport systems.

Market Dynamics:

Driver:

Increasing urbanization and traffic congestion

The surge in urbanization and traffic density is propelling the shared and on-demand mobility market. Expanding cities face issues like road congestion, parking shortages, and longer commutes due to private vehicle dependence. Consumers increasingly prefer convenient, flexible, and time-saving transport alternatives. Solutions such as ride-hailing, car-sharing, and e-bike services address these urban mobility challenges effectively. Authorities and planners are encouraging these models to improve transport efficiency, reduce environmental footprint, and better utilize infrastructure. With urban populations rising steadily, the demand for shared and on-demand mobility services continues to grow worldwide, offering cities sustainable and efficient travel options.

Restraint:

Safety and security concerns

Safety and security issues pose significant challenges to the shared and on-demand mobility market. Users are concerned about ride safety, vehicle quality, and driver reliability, which can restrict service adoption. Privacy risks, cyber threats, and potential data breaches on mobility platforms heighten user hesitation. Incidents such as accidents or driver misconduct can harm brand credibility and reduce trust. To address these concerns, companies need substantial investments in background verification, insurance, and monitoring technologies. Persistent security worries can slow the adoption rate and limit market penetration. Ensuring safety and privacy is essential for boosting consumer confidence and achieving sustainable growth in shared and on-demand mobility services.

Opportunity:

Adoption of electric and autonomous vehicles

Integrating electric and autonomous vehicles into shared and on-demand mobility offers major growth potential. EVs help reduce fuel expenses, operational costs, and environmental impact, supporting sustainability initiatives. Autonomous vehicles can cut labor costs, increase service efficiency, and enhance safety and reliability. Providers investing in EV and AV fleets can stand out in a competitive landscape while catering to

rising consumer demand for green and advanced mobility options. Supportive government policies, including EV infrastructure development and AV testing programs, further encourage adoption. Leveraging these technologies enables companies to expand services, improve cost efficiency, and deliver eco-friendly, innovative transportation solutions that meet the evolving needs of urban commuters.

Threat:

Economic fluctuations and fuel price volatility

Economic instability and fluctuating fuel prices pose significant threats to the shared and on-demand mobility sector. Increases in fuel costs raise operational expenses for ride-hailing, car-sharing, and micro-mobility services, potentially forcing higher fares and reducing consumer usage. During economic slowdowns or recessions, limited disposable income can decrease spending on paid mobility options. Inflation and shifting governmental regulations may further affect profitability and cost management. Small and mid-sized providers are especially exposed to these financial uncertainties. These factors challenge companies' ability to maintain operational efficiency, control expenses, and provide consistent service. Effectively addressing economic risks is essential to ensure sustainable growth and competitive positioning in the mobility market.

Covid-19 Impact:

The shared and on-demand mobility market experienced significant disruption due to the COVID-19 pandemic. Lockdowns, mobility restrictions, and social distancing dramatically reduced demand for ride-hailing, car-sharing, and micro-mobility solutions. Users' fear of virus transmission in shared vehicles prompted many to rely on personal transport or limit travel. Service providers faced revenue decline, operational setbacks, and higher costs for sanitation, safety, and hygiene measures. On the positive side, the crisis accelerated the adoption of digital tools, contactless payment systems, and enhanced hygiene practices. As restrictions lifted, the market has gradually rebounded, with an increased emphasis on safety, flexibility, and innovative mobility solutions driving post-pandemic growth and recovery.

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. These platforms, accessible via mobile applications, allow users to

request rides at their convenience, transforming conventional transportation systems. The proliferation of smart phones and the growing dependence on digital services have accelerated the adoption of ride-hailing globally. Major players such as Uber, Lyft, and Ola have leveraged this shift, broadening their service networks and offerings. The sector's leadership is driven by its adaptability, intuitive user experiences, and the capacity to deliver timely and personalized transportation options in urban environments.

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. This growth is attributed to urbanization trends, heightened environmental consciousness, and the demand for affordable transportation options. Motorcycles and scooters offer agile and efficient mobility solutions, especially in densely populated cities facing traffic jams and scarce parking. They serve as a sustainable transportation choice, supporting eco-friendly initiatives. The adoption of electric two-wheelers further boosts their attractiveness by lowering emissions and reducing maintenance expenses. Collectively, these elements contribute to the two-wheeler segment's prominence and rapid development in the shared mobility market.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share. This leadership is attributed to factors such as swift urban development, widespread smartphone usage, and an escalating need for cost-effective and accessible transportation options. Nations like China and India are leading the charge, with widespread adoption of services like ride-hailing and micro-mobility. Moreover, favorable government initiatives and infrastructure enhancements have significantly propelled market expansion. The region's vast population and dynamic urbanization trends continue to solidify its prominent role in the shared mobility industry.

Region with highest CAGR:

Over the forecast period, the Middle East and Africa region is anticipated to exhibit the highest CAGR. Factors such as swift urban development, a rising population, and an increasing need for eco-friendly and efficient transport options are fueling this growth. Major cities like Dubai and Nairobi are at the forefront, implementing bike-sharing programs and enhancing smart mobility infrastructure. Supportive government policies

and the influx of large-scale events further boost demand, presenting new opportunities for mobility service providers. This dynamic environment fosters continuous investment and innovation in the region's transportation sector.

Key players in the market

Some of the key players in Shared & On-Demand Mobility Market include Uber Technologies Inc., Lyft Inc., Didi Global Inc., Grab Holdings Inc., Bolt Technology O?, Cabify Espa?a S.L., Europcar Mobility Group SA, GreenGo Car Europe Ltd., Free2Move, Urban Mobility Tech, 3evi, Zipcar, Bird, Lime and ANI Technologies Private Limited.

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. By combining Uber's ridesharing network with Momenta's autonomous driving technology, the two companies aim to accelerate and deliver safe, scalable, and efficient Robotaxi services.

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. FREENOW will continue operating as it does, with its talented leadership team and employees in place to drive growth across 9 countries and over 150 cities across Ireland, the United Kingdom, Germany, Greece, Spain, Italy, Poland, France, and Austria.

In February 2025, Grove Collaborative Holdings, Inc. announced it has completed the purchase of substantially all of the assets of eco-friendly, effective cleaning products pioneer Grab Green. This strategic acquisition underscores and reaffirms Grove's mission to make consumer products a force for environmental and human good while strengthening the Company's position as a leader in home cleaning.

Service Types Covered:

Ride-Hailing

Car Sharing

Bike Sharing

Scooter Sharing

Microtransit Services

Public Transit Integration Platforms

Vehicle Types Covered:

Passenger Cars

Light Commercial Vehicles (LCVs)

Two-Wheelers

Vans & Shuttles

Autonomous Pods & Robo-Taxis

Business Models Covered:

Peer-to-Peer (P2P)

Business-to-Consumer (B2C)

Business-to-Business (B2B)

Subscription-Based Access

Pay-Per-Use Access

Propulsion Types Covered:

Internal Combustion Engine (ICE)

Battery Electric Vehicles (BEVs)

Plug-in Hybrid Electric Vehicles (PHEVs)

Fuel Cell Electric Vehicles (FCEVs)

Commute Types Covered:

Intracity Commute

Intercity Commute

First/Last Mile Connectivity

Autonomy Levels Covered:

Human-Driven

Semi-Autonomous

Fully Autonomous

End Users Covered:

Individual Consumers

Corporate Mobility Fleets

Municipal & Government Bodies

Mobility-as-a-Service (MaaS) Aggregators

Regions Covered:

North America

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

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
- 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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