

Sustainable Urban Mobility Market Forecasts to 2032 – Global Analysis By Vehicle Type (Electric Passenger Vehicles (EVs), Hybrid Passenger Vehicles, Autonomous Urban Shuttles, Manual Bicycles, Electric Bicycles (e-bikes), Micro-Mobility Vehicles and Low-Speed Neighborhood Electric Vehicles (NEVs)), Infrastructure Type, Transport Mode, Service Model, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Sustainable Urban Mobility Market is accounted for \$168.80 billion in 2025 and is expected to reach \$322.11 billion by 2032 growing at a CAGR of 9.67% during the forecast period. Sustainable urban mobility emphasizes developing city transportation systems that are efficient, environmentally responsible, and accessible to all. The objective is to cut traffic congestion, decrease carbon emissions, and enhance air quality by prioritizing public transit, walking, and cycling instead of private vehicles. Incorporating advanced technologies, like smart traffic control and electric vehicle networks, strengthens mobility while lowering ecological impact. Effective urban design, including pedestrian-friendly zones, dedicated bike paths, and well-connected transit stations, supports this vision. Promoting shared transportation and reducing dependence on fossil fuels contributes to eco-conscious cities. This strategy not only streamlines movement but also encourages healthier, safer, and more vibrant urban living spaces.

According to the International Energy Agency (IEA), the transport sector accounts for over 24% of global CO₂ emissions, with urban mobility contributing a major share. Electrification, modal shifts to public transit, and active mobility (walking, cycling) are

critical to decarbonization.

Market Dynamics:

Driver:

Rising environmental awareness

Growing environmental consciousness among people and organizations is a major factor driving the sustainable urban mobility market. Concerns about pollution, carbon emissions, and climate change encourage the adoption of cleaner transport alternatives. Businesses are introducing eco-friendly initiatives, including electric vehicle fleets, staff shuttle services, and commuting incentives. Awareness campaigns and educational programs promote walking, cycling, car-sharing, and public transportation. As individuals and institutions prioritize sustainability, demand rises for low-emission vehicles, shared mobility, and green infrastructure. This shift in societal behavior supports the rapid implementation of sustainable urban mobility strategies, fostering healthier, environmentally friendly, and resilient urban landscapes while contributing to global efforts for climate mitigation.

Restraint:

High initial investment costs

The sustainable urban mobility market faces a significant challenge due to the high upfront costs of infrastructure and technology adoption. Developing electric vehicle networks, modernizing public transport, and integrating intelligent traffic systems require substantial financial resources. Limited budgets for municipal authorities and private enterprises often slow down these initiatives. Moreover, the procurement of advanced electric or autonomous vehicles demands considerable initial expenditure, making it difficult for smaller cities and emerging economies to implement sustainable solutions. These economic constraints hinder the widespread deployment of green transport systems. As a result, although environmental and operational advantages exist, market growth is restricted because of the substantial investment requirements for stakeholders.

Opportunity:

Expansion of shared mobility services

The rising adoption of shared mobility solutions, including car-sharing, ride-hailing, and bike-sharing, provides a major opportunity for the sustainable urban mobility market. Shared transport reduces private vehicle use, alleviates congestion, and lowers carbon emissions. The integration of mobile applications, GPS navigation, and digital payment systems improves user convenience and overall experience. Companies are developing innovative models, such as subscription-based mobility services and multi-modal platforms, to appeal to city commuters. Expanding shared mobility networks in highly populated urban areas enhances accessibility, reduces traffic issues, and promotes eco-friendly commuting habits. This growing trend is expected to significantly contribute to the expansion of the sustainable urban mobility market.

Threat:

Economic instability and funding issues

Financial instability and limited funding represent a major threat to the sustainable urban mobility market. Economic fluctuations, inflation, and government budget cuts can reduce investments in eco-friendly infrastructure, public transit systems, and electric vehicle initiatives. Private organizations may face financial difficulties, restricting their ability to innovate or expand shared and sustainable transport services. Delays in financing or reallocation of funds can slow infrastructure projects, including charging networks, intelligent traffic management, and modernized public transport. These financial constraints can hinder the adoption of low-emission transport options, limit market growth, and create uncertainty for stakeholders engaged in sustainable urban mobility development, particularly in developing and economically vulnerable regions.

Covid-19 Impact:

The COVID-19 outbreak had a notable impact on the sustainable urban mobility market. Lockdowns, movement restrictions, and reduced economic activity caused a decline in public transport usage, shared mobility services, and daily commuting. While cities saw a temporary decrease in traffic congestion and air pollution, the adoption of green mobility solutions slowed due to health risks and social distancing requirements. Funding for electric vehicles, modern transport infrastructure, and smart mobility technologies was often postponed or scaled back, limiting market growth. Nevertheless, the pandemic emphasized the need for safe, resilient, and low-emission transport systems. The post-pandemic period presents opportunities for governments and businesses to enhance investment in sustainable urban mobility projects.

The electric passenger vehicles (EVs) segment is expected to be the largest during the forecast period

The electric passenger vehicles (EVs) segment is expected to account for the largest market share during the forecast period. Environmental awareness, government subsidies, and stringent emission standards have encouraged the shift toward electric cars in cities. Urban commuters are increasingly drawn to EVs because of reduced running costs, no direct emissions, and expanding charging infrastructure. Vehicle manufacturers are enhancing EV offerings with improved battery performance, longer range, and advanced technology features, boosting consumer adoption. EVs play a crucial role in mitigating air pollution, lowering greenhouse gas emissions, and easing urban traffic congestion. Their growing acceptance and strategic importance make electric passenger vehicles the leading segment in sustainable urban transportation solutions.

The micro-mobility transport segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the micro-mobility transport segment is predicted to witness the highest growth rate. The surge is driven by the rising need for affordable, convenient, and environmentally friendly last-mile travel options. Commuters favor micro-mobility for short trips due to its flexibility, cost-effectiveness, and minimal carbon footprint. Integration with mobile applications, ride-sharing platforms, and smooth connections with public transit further enhances accessibility and convenience. Additionally, urban planning that supports dedicated lanes, pedestrian-friendly areas, and low-emission zones promotes adoption. Collectively, these dynamics make micro-mobility transport the segment with the highest CAGR, highlighting its critical role in sustainable urban mobility development.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share. The region's strict emission regulations, supportive government policies, and significant investments in green transport infrastructure contribute to its dominance. European cities actively promote electric vehicles, shared transport systems, and enhanced public transit networks to tackle pollution and reduce traffic congestion. The presence of established automotive and technology companies supports rapid innovation and adoption of eco-friendly mobility solutions. High public environmental

awareness and a well-developed charging infrastructure further encourage sustainable commuting behaviors. Collectively, these factors make Europe the top region globally in sustainable urban mobility, holding the largest market share and setting a benchmark for other regions.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Factors such as rapid urbanization, high population density, and increased demand for efficient transport solutions are driving the adoption of green mobility options. Governments in nations including China, India, and Japan are introducing supportive policies, incentives, and subsidies to encourage electric vehicles, shared transport, and low-emission public transit. Investments in smart urban infrastructure such as dedicated cycling paths, pedestrian-friendly zones and EV charging networks, further boost growth. Rising environmental awareness and advancements in electric and micro-mobility technologies make Asia-Pacific the leading region in terms of growth rate in the global market.

Key players in the market

Some of the key players in Sustainable Urban Mobility Market include Fiil e-motion, GeoMate, Populus, Rabbit Mobility, Viggo, HumanForest, Shuttlers, Ryde Technology, Orbility, Zeelo, CleverShuttle, Drop, SUM Solutions, Standab and VISNX.

Key Developments:

In August 2025, Ryde Group Ltd and Concorde International Group Ltd. announced that they have entered into a strategic partnership. The collaboration aims to create industry wide job opportunities for Ryde's driver-partners within the facilities management and security sectors-diversifying income streams while supporting the growing demand for manpower across office, retail, hospitality, industrial and medical facilities.

In June 2025, Populous announced the acquisition of Denver-based Fentress Architects, a global leader in iconic aviation projects and prominent public buildings, including convention centers, museums and government facilities. This strategic acquisition unites two of the most respected names in architecture, combining Populous' unparalleled expertise in designing memorable experiences with Fentress' award-winning portfolio of aviation, civic and cultural landmarks.

In October 2024, Rabbit Mobility has raised \$1.3 million in an investment round to support its expansion efforts across Egypt and North African markets. Leading the funding are 500 Global, a venture capital firm, and Untapped Global, which specialises in smart asset financing. A group of local and international angel investors also participated in the round. The investment marks a significant boost for Rabbit Mobility as it continues its mission to promote urban sustainability.

Vehicle Types Covered:

- Electric Passenger Vehicles (EVs)
- Hybrid Passenger Vehicles
- Autonomous Urban Shuttles
- Manual Bicycles
- Electric Bicycles (e-bikes)
- Micro-Mobility Vehicles
- Low-Speed Neighborhood Electric Vehicles (NEVs)

Infrastructure Types Covered:

- EV Charging Infrastructure
- Smart Traffic Management Systems
- Dedicated Cycling Infrastructure
- Pedestrian Infrastructure
- Urban Mobility Data Platforms
- Intermodal Transit Hubs
- Parking & Curbside Management Systems

Transport Modes Covered:

- Fixed-Route Public Transit
- Non-Motorized Transport
- Shared Motorized Transport
- Micro-Mobility Transport
- On-Demand Transit

Service Models Covered:

- Mobility-as-a-Service (MaaS)
- Subscription-Based Mobility
- Pay-Per-Use Shared Mobility
- Integrated Ticketing & Payment Systems
- Corporate Mobility Solutions

End Users Covered:

- Municipal & Regional Governments
- Private Mobility Operators
- Urban Residents
- Commercial Enterprises
- Tourists & Temporary Visitors

Educational Institutions & Campuses

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

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 End User Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL SUSTAINABLE URBAN MOBILITY MARKET, BY VEHICLE TYPE

Sustainable Urban Mobility Market Forecasts to 2032 – Global Analysis By Vehicle Type (Electric Passenger Vehi...

- 5.1 Introduction
- 5.2 Electric Passenger Vehicles (EVs)
- 5.3 Hybrid Passenger Vehicles
- 5.4 Autonomous Urban Shuttles
- 5.5 Manual Bicycles
- 5.6 Electric Bicycles (e-bikes)
- 5.7 Micro-Mobility Vehicles
- 5.8 Low-Speed Neighborhood Electric Vehicles (NEVs)

6 GLOBAL SUSTAINABLE URBAN MOBILITY MARKET, BY INFRASTRUCTURE TYPE

- 6.1 Introduction
- 6.2 EV Charging Infrastructure
- 6.3 Smart Traffic Management Systems
- 6.4 Dedicated Cycling Infrastructure
- 6.5 Pedestrian Infrastructure
- 6.6 Urban Mobility Data Platforms
- 6.7 Intermodal Transit Hubs
- 6.8 Parking & Curbside Management Systems

7 GLOBAL SUSTAINABLE URBAN MOBILITY MARKET, BY TRANSPORT MODE

- 7.1 Introduction
- 7.2 Fixed-Route Public Transit
- 7.3 Non-Motorized Transport
- 7.4 Shared Motorized Transport
- 7.5 Micro-Mobility Transport
- 7.6 On-Demand Transit

8 GLOBAL SUSTAINABLE URBAN MOBILITY MARKET, BY SERVICE MODEL

- 8.1 Introduction
- 8.2 Mobility-as-a-Service (MaaS)
- 8.3 Subscription-Based Mobility
- 8.4 Pay-Per-Use Shared Mobility
- 8.5 Integrated Ticketing & Payment Systems
- 8.6 Corporate Mobility Solutions

9 GLOBAL SUSTAINABLE URBAN MOBILITY MARKET, BY END USER

- 9.1 Introduction
- 9.2 Municipal & Regional Governments
- 9.3 Private Mobility Operators
- 9.4 Urban Residents
- 9.5 Commercial Enterprises
- 9.6 Tourists & Temporary Visitors
- 9.7 Educational Institutions & Campuses

10 GLOBAL SUSTAINABLE URBAN MOBILITY MARKET, BY GEOGRAPHY

- 10.1 Introduction
- 10.2 North America
 - 10.2.1 US
 - 10.2.2 Canada
 - 10.2.3 Mexico
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.2 UK
 - 10.3.3 Italy
 - 10.3.4 France
 - 10.3.5 Spain
 - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
 - 10.4.1 Japan
 - 10.4.2 China
 - 10.4.3 India
 - 10.4.4 Australia
 - 10.4.5 New Zealand
 - 10.4.6 South Korea
 - 10.4.7 Rest of Asia Pacific
- 10.5 South America
 - 10.5.1 Argentina
 - 10.5.2 Brazil
 - 10.5.3 Chile
 - 10.5.4 Rest of South America
- 10.6 Middle East & Africa

- 10.6.1 Saudi Arabia
- 10.6.2 UAE
- 10.6.3 Qatar
- 10.6.4 South Africa
- 10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

12 COMPANY PROFILING

- 12.1 Fiil e-motion
- 12.2 GeoMate
- 12.3 Populus
- 12.4 Rabbit Mobility
- 12.5 Viggo
- 12.6 HumanForest
- 12.7 Shuttlers
- 12.8 Ryde Technology
- 12.9 Orbility
- 12.10 Zeelo
- 12.11 CleverShuttle
- 12.12 Drop
- 12.13 SUM Solutions
- 12.14 Standab
- 12.15 VISNX

List Of Tables

LIST OF TABLES

Table 1 Global Sustainable Urban Mobility Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Sustainable Urban Mobility Market Outlook, By Vehicle Type (2024-2032) (\$MN)

Table 3 Global Sustainable Urban Mobility Market Outlook, By Electric Passenger Vehicles (EVs) (2024-2032) (\$MN)

Table 4 Global Sustainable Urban Mobility Market Outlook, By Hybrid Passenger Vehicles (2024-2032) (\$MN)

Table 5 Global Sustainable Urban Mobility Market Outlook, By Autonomous Urban Shuttles (2024-2032) (\$MN)

Table 6 Global Sustainable Urban Mobility Market Outlook, By Manual Bicycles (2024-2032) (\$MN)

Table 7 Global Sustainable Urban Mobility Market Outlook, By Electric Bicycles (e-bikes) (2024-2032) (\$MN)

Table 8 Global Sustainable Urban Mobility Market Outlook, By Micro-Mobility Vehicles (2024-2032) (\$MN)

Table 9 Global Sustainable Urban Mobility Market Outlook, By Low-Speed Neighborhood Electric Vehicles (NEVs) (2024-2032) (\$MN)

Table 10 Global Sustainable Urban Mobility Market Outlook, By Infrastructure Type (2024-2032) (\$MN)

Table 11 Global Sustainable Urban Mobility Market Outlook, By EV Charging Infrastructure (2024-2032) (\$MN)

Table 12 Global Sustainable Urban Mobility Market Outlook, By Smart Traffic Management Systems (2024-2032) (\$MN)

Table 13 Global Sustainable Urban Mobility Market Outlook, By Dedicated Cycling Infrastructure (2024-2032) (\$MN)

Table 14 Global Sustainable Urban Mobility Market Outlook, By Pedestrian Infrastructure (2024-2032) (\$MN)

Table 15 Global Sustainable Urban Mobility Market Outlook, By Urban Mobility Data Platforms (2024-2032) (\$MN)

Table 16 Global Sustainable Urban Mobility Market Outlook, By Intermodal Transit Hubs (2024-2032) (\$MN)

Table 17 Global Sustainable Urban Mobility Market Outlook, By Parking & Curbside Management Systems (2024-2032) (\$MN)

Table 18 Global Sustainable Urban Mobility Market Outlook, By Transport Mode

(2024-2032) (\$MN)

Table 19 Global Sustainable Urban Mobility Market Outlook, By Fixed-Route Public Transit (2024-2032) (\$MN)

Table 20 Global Sustainable Urban Mobility Market Outlook, By Non-Motorized Transport (2024-2032) (\$MN)

Table 21 Global Sustainable Urban Mobility Market Outlook, By Shared Motorized Transport (2024-2032) (\$MN)

Table 22 Global Sustainable Urban Mobility Market Outlook, By Micro-Mobility Transport (2024-2032) (\$MN)

Table 23 Global Sustainable Urban Mobility Market Outlook, By On-Demand Transit (2024-2032) (\$MN)

Table 24 Global Sustainable Urban Mobility Market Outlook, By Service Model (2024-2032) (\$MN)

Table 25 Global Sustainable Urban Mobility Market Outlook, By Mobility-as-a-Service (MaaS) (2024-2032) (\$MN)

Table 26 Global Sustainable Urban Mobility Market Outlook, By Subscription-Based Mobility (2024-2032) (\$MN)

Table 27 Global Sustainable Urban Mobility Market Outlook, By Pay-Per-Use Shared Mobility (2024-2032) (\$MN)

Table 28 Global Sustainable Urban Mobility Market Outlook, By Integrated Ticketing & Payment Systems (2024-2032) (\$MN)

Table 29 Global Sustainable Urban Mobility Market Outlook, By Corporate Mobility Solutions (2024-2032) (\$MN)

Table 30 Global Sustainable Urban Mobility Market Outlook, By End User (2024-2032) (\$MN)

Table 31 Global Sustainable Urban Mobility Market Outlook, By Municipal & Regional Governments (2024-2032) (\$MN)

Table 32 Global Sustainable Urban Mobility Market Outlook, By Private Mobility Operators (2024-2032) (\$MN)

Table 33 Global Sustainable Urban Mobility Market Outlook, By Urban Residents (2024-2032) (\$MN)

Table 34 Global Sustainable Urban Mobility Market Outlook, By Commercial Enterprises (2024-2032) (\$MN)

Table 35 Global Sustainable Urban Mobility Market Outlook, By Tourists & Temporary Visitors (2024-2032) (\$MN)

Table 36 Global Sustainable Urban Mobility Market Outlook, By Educational Institutions & Campuses (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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