

# Urban Congestion Pricing and Mobility?Based Taxation Market Forecasts to 2034 – Global Analysis By Pricing Model (Spatial Pricing Models and Temporal Pricing Models), Technology, Application and By Geography

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## Abstracts

According to Statistics MRC, the Global Urban Congestion Pricing and Mobility?Based Taxation Market is accounted for \$8.9 billion in 2026 and is expected to reach \$24.4 billion by 2034 growing at a CAGR of 13.5% during the forecast period. Urban congestion pricing and mobility-focused tax systems are strategies used to regulate traffic volumes and support transportation funding. They require motorists to pay fees when accessing crowded urban areas or traveling during peak periods, aiming to ease congestion and decrease environmental impact. Mobility-based taxes can also replace fuel levies with distance##- ##or usage-based charges. These measures foster optimized road utilization, environmental responsibility, and stable revenue streams for infrastructure development. Cities adopting these frameworks frequently observe smoother traffic movement, lower emissions, and stronger financial backing for public transit networks and advanced mobility technologies.

According to the World Bank (2023), global CO<sub>2</sub> emissions from transport reached approximately 7,400 Mt CO<sub>2</sub>e. Road transport contributes the majority share — about 70–75% of transport emissions — making urban road transport a significant contributor. The World Bank highlights vehicle taxation, fuel taxation, and congestion pricing as critical levers to reduce emissions and manage demand.

## Market Dynamics:

Driver:

## Rising urban traffic congestion

The steady rise in city populations and private vehicle ownership has led to severe traffic crowding across metropolitan regions. Expanding commercial and residential activities place heavy strain on limited road infrastructure, causing delays and higher transportation costs. Such congestion lowers workforce efficiency and heightens environmental and social challenges. To address these concerns, governments are turning to congestion charges and mobility-oriented tax models that regulate road demand. Strategic fee structures during peak periods help shift travel patterns and promote public transit usage. Mounting infrastructure pressure is therefore accelerating the adoption of innovative road pricing frameworks.

### Restraint:

#### High implementation and operational costs

The financial demands of implementing road pricing systems pose a considerable challenge. Advanced hardware, digital platforms, surveillance equipment, and billing infrastructure require heavy initial spending. Beyond installation, continuous maintenance, technical support, and cybersecurity protection add recurring costs. Municipalities with constrained budgets may struggle to justify such expenditures. Concerns regarding cost-effectiveness and long-term financial sustainability further complicate decision-making. As a result, high setup and operational expenses represent a substantial obstacle to expanding congestion pricing and mobility taxation programs across diverse urban regions.

### Opportunity:

#### Expansion of smart city initiatives

The global push toward smart urban transformation offers significant prospects for congestion pricing and mobility taxation systems. Investments in digital traffic monitoring, connected infrastructure, and advanced analytics provide the foundation for usage-based road charges. Modern urban planning increasingly emphasizes data-driven mobility management, enabling seamless integration of pricing mechanisms. Technologies such as artificial intelligence and IoT improve system precision and adaptability. As municipalities prioritize sustainable and technology-enabled governance, the expansion of smart city ecosystems creates substantial opportunities

for scaling innovative road pricing solutions.

Threat:

Technological system failures and cybersecurity risks

The dependence on advanced digital networks exposes road pricing systems to technical breakdowns and security breaches. Faulty equipment or incorrect billing processes may lead to public dissatisfaction and legal disputes. Cybercriminal activities targeting databases or financial transactions can compromise sensitive information. Interruptions in system performance affect both enforcement and revenue generation. Maintaining strong digital safeguards demands ongoing resources and expertise. Consequently, the potential for operational disruptions and cybersecurity incidents represents a critical threat to the sustainability of congestion pricing programs.

### **Covid-19 Impact:**

The outbreak of COVID-19 had a profound effect on congestion pricing and mobility-based tax systems, primarily due to decreased urban travel. Restrictions on movement, widespread remote work adoption, and business shutdowns caused traffic levels to fall sharply, reducing revenue streams tied to road usage. Several municipalities deferred new pricing projects or paused operational programs amid financial instability. Public funds were redirected toward crisis management and healthcare priorities, slowing transport reforms. Nevertheless, the crisis underscored the importance of diversified and sustainable transportation funding approaches, reinforcing future demand for adaptable and technology-enabled mobility taxation frameworks.

The spatial pricing models segment is expected to be the largest during the forecast period

The spatial pricing models segment is expected to account for the largest market share during the forecast period owing to their broad adoption across metropolitan regions. Under this system, drivers are charged when accessing predefined high-congestion areas within a city. The zone-based framework simplifies administrative processes and strengthens regulatory control. Governments prefer Spatial Pricing Models as they efficiently manage localized traffic pressure while ensuring stable funding for transportation infrastructure. By focusing on geographically defined districts, these models optimize mobility patterns and support structured urban traffic management, reinforcing their leading position in the market.

The public transport integration segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the public transport integration segment is predicted to witness the highest growth rate as cities increasingly promote coordinated and sustainable transportation networks. Authorities are connecting road pricing mechanisms with public transit services to reduce dependence on personal vehicles and strengthen collective mobility systems. Funds collected through congestion charges are often directed toward upgrading transit facilities and improving digital access platforms. The incorporation of integrated mobility solutions supports smoother commuter journeys and better traffic distribution. With rising focus on environmental responsibility and efficient urban travel, this segment shows the most rapid expansion.

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

During the forecast period, the Europe region is expected to hold the largest market share, driven by proactive transportation policies and sustainability goals. Many cities across the region were pioneers in introducing road pricing mechanisms to address congestion and environmental concerns. Strong legislative backing and climate-focused strategies support consistent implementation and expansion. Well-developed infrastructure and modern traffic management technologies contribute to effective system performance. Ongoing advancements in smart transportation and multimodal integration continue to strengthen Europe's position as the most established and influential market for congestion pricing frameworks.

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

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by expanding urban populations and increasing transportation demand. Rapid motorization in developing economies has intensified congestion problems, encouraging policymakers to explore structured road pricing systems. Investments in advanced traffic management technologies and smart infrastructure support scalable implementation. Rising awareness of pollution control and sustainable development further propels regional initiatives. With governments prioritizing efficient mobility planning and diversified revenue mechanisms, Asia Pacific stands out as the most rapidly advancing market segment.

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

Some of the key players in Urban Congestion Pricing and Mobility?Based Taxation Market include ST Engineering, KPMG, Siemens Mobility, Deloitte, IMS, Kapsch, Q-Free, Emovis, Verra Mobility, WSP, ClearRoad, TransCore, Cubic Corporation, Conduent Transportation, Yunex Traffic, Thales Group, IBM and A-to-Be

### **Key Developments:**

In February 2026, Siemens Mobility and Stadler has officially confirmed the framework agreement signed with DSB for the delivery of 226 fully automated electric multiple units for the S-Bane suburban network in Copenhagen. The project is valued at approximately EUR 3 billion and will create the world's largest open rail system with automatic train operation (GoA4).

In December 2025, IBM and Confluent, Inc. announced they have entered into a definitive agreement under which IBM will acquire all of the issued and outstanding common shares of Confluent for \$31 per share, representing an enterprise value of \$11 billion. Confluent provides a leading open-source enterprise data streaming platform that connects processes and governs reusable and reliable data and events in real time, foundational for the deployment of AI.

In June 2025, Thales and Qatar Airways have signed a Memorandum of Agreement (MoA) to support Qatar Airways' strategic fleet growth plan announced last month. This agreement sets the course for future inflight entertainment (IFE) innovations to support Qatar Airways' digital transformation journey, giving the airline access to the most innovative technologies.

### **Pricing Models Covered:**

Spatial Pricing Models

Temporal Pricing Models

### **Technologies Covered:**

Tracking Technologies

User Interface & Payment

## Analytics & Enforcement

### Applications Covered:

Passenger Vehicles

Commercial Fleets

Public Transport Integration

### 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

## 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 URBAN CONGESTION PRICING AND MOBILITY BASED TAXATION MARKET, BY PRICING MODEL**

- 5.1 Spatial Pricing Models
  - 5.1.1 Cordon-based Pricing
  - 5.1.2 Distance-based Taxation
- 5.2 Temporal Pricing Models
  - 5.2.1 Time-of-Day Pricing
  - 5.2.2 Dynamic Demand-Based Pricing

## **6 GLOBAL URBAN CONGESTION PRICING AND MOBILITY BASED TAXATION MARKET, BY TECHNOLOGY**

- 6.1 Tracking Technologies
  - 6.1.1 GPS-based Systems
  - 6.1.2 RFID/Tolling Infrastructure
- 6.2 User Interface & Payment
  - 6.2.1 Mobile App Integration
- 6.3 Analytics & Enforcement
  - 6.3.1 AI-Driven Traffic Monitoring

## **7 GLOBAL URBAN CONGESTION PRICING AND MOBILITY BASED TAXATION MARKET, BY APPLICATION**

- 7.1 Passenger Vehicles
- 7.2 Commercial Fleets
- 7.3 Public Transport Integration

## **8 GLOBAL URBAN CONGESTION PRICING AND MOBILITY BASED TAXATION MARKET, BY GEOGRAPHY**

- 8.1 North America
  - 8.1.1 United States
  - 8.1.2 Canada
  - 8.1.3 Mexico

## 8.2 Europe

8.2.1 United Kingdom

8.2.2 Germany

8.2.3 France

8.2.4 Italy

8.2.5 Spain

8.2.6 Netherlands

8.2.7 Belgium

8.2.8 Sweden

8.2.9 Switzerland

8.2.10 Poland

8.2.11 Rest of Europe

## 8.3 Asia Pacific

8.3.1 China

8.3.2 Japan

8.3.3 India

8.3.4 South Korea

8.3.5 Australia

8.3.6 Indonesia

8.3.7 Thailand

8.3.8 Malaysia

8.3.9 Singapore

8.3.10 Vietnam

8.3.11 Rest of Asia Pacific

## 8.4 South America

8.4.1 Brazil

8.4.2 Argentina

8.4.3 Colombia

8.4.4 Chile

8.4.5 Peru

8.4.6 Rest of South America

## 8.5 Rest of the World (RoW)

8.5.1 Middle East

8.5.1.1 Saudi Arabia

8.5.1.2 United Arab Emirates

8.5.1.3 Qatar

8.5.1.4 Israel

8.5.1.5 Rest of Middle East

8.5.2 Africa

- 8.5.2.1 South Africa
- 8.5.2.2 Egypt
- 8.5.2.3 Morocco
- 8.5.2.4 Rest of Africa

## **9 STRATEGIC MARKET INTELLIGENCE**

- 9.1 Industry Value Network and Supply Chain Assessment
- 9.2 White-Space and Opportunity Mapping
- 9.3 Product Evolution and Market Life Cycle Analysis
- 9.4 Channel, Distributor, and Go-to-Market Assessment

## **10 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 10.1 Mergers and Acquisitions
- 10.2 Partnerships, Alliances, and Joint Ventures
- 10.3 New Product Launches and Certifications
- 10.4 Capacity Expansion and Investments
- 10.5 Other Strategic Initiatives

## **11 COMPANY PROFILES**

- 11.1 ST Engineering
- 11.2 KPMG
- 11.3 Siemens Mobility
- 11.4 Deloitte
- 11.5 IMS
- 11.6 Kapsch
- 11.7 Q-Free
- 11.8 Emovis
- 11.9 Verra Mobility
- 11.10 WSP
- 11.11 ClearRoad
- 11.12 TransCore
- 11.13 Cubic Corporation
- 11.14 Conduent Transportation
- 11.15 Yunex Traffic
- 11.16 Thales Group
- 11.17 IBM

11.18 A-to-Be

## List Of Tables

### LIST OF TABLES

- Table 1 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Pricing Model (2023-2034) (\$MN)
- Table 3 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Spatial Pricing Models (2023-2034) (\$MN)
- Table 4 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Cordon-based Pricing (2023-2034) (\$MN)
- Table 5 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Distance-based Taxation (2023-2034) (\$MN)
- Table 6 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Temporal Pricing Models (2023-2034) (\$MN)
- Table 7 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Time-of-Day Pricing (2023-2034) (\$MN)
- Table 8 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Dynamic Demand-Based Pricing (2023-2034) (\$MN)
- Table 9 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Technology (2023-2034) (\$MN)
- Table 10 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Tracking Technologies (2023-2034) (\$MN)
- Table 11 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By GPS-based Systems (2023-2034) (\$MN)
- Table 12 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By RFID/Tolling Infrastructure (2023-2034) (\$MN)
- Table 13 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By User Interface & Payment (2023-2034) (\$MN)
- Table 14 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Mobile App Integration (2023-2034) (\$MN)
- Table 15 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Analytics & Enforcement (2023-2034) (\$MN)
- Table 16 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By AI-Driven Traffic Monitoring (2023-2034) (\$MN)
- Table 17 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook, By Application (2023-2034) (\$MN)
- Table 18 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook,

By Passenger Vehicles (2023-2034) (\$MN)

Table 19 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook,  
By Commercial Fleets (2023-2034) (\$MN)

Table 20 Global Urban Congestion Pricing and Mobility Based Taxation Market Outlook,  
By Public Transport Integration (2023-2034) (\$MN)

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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