

Urban Mobility Market Forecasts to 2034 – Analysis By Mode (Public Transit, Shared Mobility, Micro-Mobility, Demand-Responsive Transportation, and Personal Mobility), Propulsion, Service Model, Application, and By Geography

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Abstracts

According to Statistics MRC, the Global Urban Mobility Market is accounted for \$16.3 billion in 2026 and is expected to reach \$29.7 billion by 2034 growing at a CAGR of 7.8% during the forecast period. Urban mobility refers to the movement of people and goods within urban areas through various transportation modes and services, including public transit, shared mobility, micro-mobility, demand-responsive transportation, and personal mobility. The market encompasses internal combustion engine, battery electric, hybrid electric, hydrogen and fuel cell, and human-powered propulsion systems across commuting, first- and last-mile connectivity, tourism and leisure, and urban logistics and delivery applications. Growing urbanization, increasing traffic congestion, rising environmental concerns, and expanding smart city initiatives are key drivers of market expansion.

Market Dynamics:

Driver:

Rapid urbanization and increasing traffic congestion

The accelerating global urbanization and growing traffic congestion in cities are primary drivers for the urban mobility market. More than half the global population lives in urban areas, creating substantial demand for efficient transportation solutions. Traffic congestion in cities results in economic losses and environmental degradation. Cities are seeking innovative mobility solutions including public transit, shared mobility, and

micro-mobility alternatives. Government policies promoting sustainable urban transport and reducing private vehicle usage are accelerating market growth. As cities continue growing and congestion intensifies, demand for urban mobility solutions expands across all modes and services.

Restraint:

High infrastructure investment and regulatory complexity

The significant investment required for urban mobility infrastructure and the complexity of regulatory frameworks represent a major restraint for the market. Public transit infrastructure requires substantial public investment. Shared mobility services face complex permitting and regulation. Micro-mobility infrastructure including bike lanes and scooter parking requires city investment. The fragmented regulatory environment across cities and countries creates operational challenges. Revenue models for mobility services often require significant scaling for profitability. These investment and regulatory challenges may slow market development, particularly in budget-constrained cities.

Opportunity:

Integration of mobility-as-a-service and multi-modal platforms

The growing adoption of mobility-as-a-service and integrated multi-modal platforms presents significant opportunities for urban mobility market expansion. MaaS platforms integrate multiple mobility options including public transit, ride-sharing, bike-sharing, and micro-mobility into a single application, enabling seamless journey planning and payment. Integrated mobility solutions improve convenience and encourage sustainable transport choices. Data analytics enable optimized operations and planning. As smartphone penetration and mobile payment adoption grow, MaaS platforms capture growing market share, enabling enhanced urban mobility experiences.

Threat:

Competition from traditional private vehicle ownership

Competition from traditional private vehicle ownership and consumer preference for personal cars poses significant threats to urban mobility service growth. Private vehicles offer convenience, flexibility, and perceived safety. Car ownership culture remains strong in many regions. Shared mobility services face challenges in competing with personal vehicle convenience. The appeal of private vehicle ownership may limit adoption of alternative mobility modes. This competition may constrain market growth, particularly in regions with established car ownership culture and limited congestion.

Covid-19 Impact:

The COVID-19 pandemic had a significant impact on urban mobility markets. Public transit ridership declined sharply during lockdowns. Shared mobility services including ride-hailing and car-sharing experienced reduced demand. However, micro-mobility usage rebounded quickly as people sought socially distanced transport. The pandemic accelerated investment in cycling infrastructure and pedestrian-friendly urban spaces. Work-from-home trends reduced commuting demand. Post-pandemic, cities are rethinking mobility systems, with continued focus on sustainable and resilient urban transport.

The Public Transit segment is expected to be the largest during the forecast period

The Public Transit segment is expected to account for the largest market share during the forecast period, driven by established infrastructure, high ridership volumes, and government investment in public transportation systems. Public transit including bus, rail transit, metro and subway, and tram and light rail serves millions of urban commuters daily. The segment benefits from government support and public funding. Growing urban populations create sustained demand. As cities invest in public transit expansion and modernization, public transit maintains the largest mode segment share.

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

Over the forecast period, the Battery Electric segment is predicted to witness the highest growth rate, fueled by the global transition toward electric mobility, government policies promoting EV adoption, and the expansion of charging infrastructure across cities. Electric buses, ride-hailing EVs, e-scooters, and e-bikes are rapidly increasing across urban mobility fleets. The segment benefits from declining battery costs and improving performance. Government mandates for zero-emission fleets are accelerating adoption. As electrification of urban transport continues, battery electric propulsion delivers the fastest segment growth.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, supported by the world's largest urban populations, rapid urbanization, and significant investment in public transit infrastructure across China, India, Japan, and Southeast Asia. The region's megacities create substantial demand for urban mobility solutions. Government investment in metro systems, bus networks, and shared mobility services is accelerating. High population density supports public transit ridership. With the largest urban population, Asia Pacific maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by continued urbanization, rising disposable incomes, and increasing

adoption of shared mobility and micro-mobility solutions across the region. The region's rapidly growing cities create substantial demand for mobility services. Government initiatives promoting sustainable urban transport are expanding. Electric mobility adoption is accelerating across the region. As urban populations and mobility needs continue growing, Asia Pacific delivers the fastest urban mobility market growth globally.

Key players in the market

Some of the key players in Urban Mobility Market include Uber Technologies, Inc., Lyft, Inc., DiDi Global Inc., Grab Holdings Limited, Bolt Technology O?, BlaBlaCar, Lime, Voi Technology AB, Dott, TIER Mobility SE, Via Transportation, Inc., Transdev Group, ComfortDelGro Corporation Limited, Moovit App Global Ltd., Siemens Mobility GmbH, and Hitachi Rail Limited.

Key Developments:

In July 2026, Grab launched pilot operations for an on-demand autonomous vehicle shuttle service in Punggol, Singapore, supporting its regional hybrid shared mobility strategy.

In February 2026, Lyft announced a \$1 billion share repurchase program following its full-year 2025 financial results, which delivered \$1.12 billion in free cash flow and a major expansion into autonomous fleet orchestration.

In February 2026, Uber partnered with Waabi in a landmark commercial agreement to deploy up to 25,000 autonomous vehicles onto its global ride-hailing network, alongside reporting \$52.02 billion in FY2025 revenue.

Modes Covered:

Public Transit

Shared Mobility

Micro-Mobility

Demand-Responsive Transportation

Personal Mobility

Propulsions Covered:

Internal Combustion Engine

Battery Electric

Hybrid Electric

Hydrogen and Fuel Cell

Human-Powered

Service Models Covered:

Public Mobility Services

Shared Mobility Services

On-Demand Mobility

Subscription-Based Mobility

Integrated Mobility Services

Applications Covered:

Commuting

First- and Last-Mile Connectivity

Tourism and Leisure

Urban Logistics and Delivery

Other Applications

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

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