

# World Market for Shared Mobility

August 2022

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## INTRODUCTION

Scope

Key findings

Examining five trends shaping shared mobility

## STATE OF THE INDUSTRY

Maturing shared mobility market is set single-digit growth in 2024

China and the US are the major global powerhouses of the shared mobility industry

Ride hailing is the dominant segment of shared mobility...

...but micro-mobility is catching up

Western Europe to see an upsurge in scooter sharing but regulations could hamper rise

North America and Asia Pacific seeing drops in market share as Middle East and Africa rises

Scooter sharing shows large potential across most regions as people opt for micro-mobility

Southeast Asian economies to record fastest growth

## LEADING COMPANIES AND BRANDS

Didi Chuxing and Uber maintain lead despite regulatory challenges and competition

Leading players are facing growing competition in some key markets

Changing dynamics in market consolidation across shared mobility segments

Four of the top 10 shared mobility brands are Chinese in 2021

## TOP TRENDS SHAPING THE INDUSTRY

Examining five trends shaping shared mobility

Electrification: shared mobility is on a mission to decarbonise the transport industry

Uber seeks to be 100% zero emissions by 2040 globally

Regulations: government regulations are creating more challenging business environments

Rome imposing stricter regulations on scooters

Diversification: new revenue streams to deliver more robust business models

Bolt: diversifying its business model

MaaS integration: moving towards a future without private passenger car travel

Moovit integrates Link and Bird e-scooters into MaaS system

AI and tech integration

Lime introduces pavement detection technology

## MARKET SNAPSHOTS

Asia Pacific

North America

Western Europe

Latin America

Eastern Europe

Australasia

Middle East and Africa

Car sharing

Bike sharing

Ride hailing

Ride sharing

Scooter sharing

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