

India Mobility as a Service (MaaS) Market Assessment, By Service Type [Public Transit, Ride-Hailing and Ride-Sharing, Bike/Scooter-Sharing, Car-Sharing, Taxi Services, Others], By Application Platform [Apps, Web Portals, In-Vehicle Systems], By Business Model [Business-To-Business, Business-To-Consumer, Peer-To-Peer], By Payment Mode [Subscription-Based and Pay-as-You-Go], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

India mobility as a service (MaaS) market is projected to witness a CAGR of 30.39% during the forecast period FY2024-FY2032F, growing from USD 1.21 billion in FY2024 to USD 10.11 billion in FY2032F.

The Indian mobility as a service (MaaS) market is experiencing a significant growth in demand due to the growing urbanization and population in the country. Cities like Delhi, Mumbai, and Bangalore are grappling with rising traffic congestion, pollution, and inadequate public transportation infrastructure due to expanding urbanization, thereby necessitating the demand for flexible and efficient mobility solutions. According to Worldometers.info, a real-time statistics website that provides various global metrics states that the current population of India was 1.45093 billion in FY2024 and 1.45887 billion as of February FY2025, an increase of 0.01293 billion from the last year. Additionally, India is expected to reach 1.46386 billion by the middle of FY2025, and approximately 37.1% of the population lives in urban areas which is expected to rise further. Therefore, these numbers highlight the requirement for a robust mobility as a service solution to cater to the growing demand for the seamless, cost-effective, and eco-friendly mobility as a service (MaaS) market in India.

Furthermore, the growing trend of online shopping, especially for groceries, has led to a higher demand for delivery services creating a fruitful environment and opportunities for mobility as a service (MaaS) providers to offer delivery services as a part of

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their service packages.

Growing Employment Rate is Proliferating the India MaaS Market Growth

The mobility as a service (MaaS) market in India is experiencing increased demand due to the growing employment rate. The need for efficient, reliable, and affordable transportation has surged as more individuals or professionals enter the workforce sector majorly in cities like Bengaluru, Hyderabad, Pune, and Noida which are hubs for information technology, manufacturing, and services.

Further, MaaS platforms address this rising demand by integrating multiple transportation modes, including ride-sharing, buses, bike rentals, and more. By offering convenient and cost-effective solutions for daily commutes, these platforms are well positioned to meet the evolving mobility needs of the workforce in urban areas. As per the annual Periodic Labour Force Survey (PLFS) report, FY2022 - FY2023, the Labour Force and workforce in India have increased steadily and on the other hand unemployment rate has declined. In FY2022 - FY2023, the Labour Force Participation Rate (LFPR), Worker Population Ratio (WPR), and Unemployment Rate (UR) were 57.9, 56.0, and 3.2 respectively as compared with 55.2, 52.9, and 4.1 in the year FY2021 - FY2022. Furthermore, people are continuously adopting technology-driven services due to the rise in disposable incomes with the growing employment, thereby positively impacting the mobility as a service (MaaS) market growth.

Government Initiatives Playing a Major Role in Driving India MaaS Market

India mobility as a service (MaaS) market is gaining momentum through direct support from government programs aimed at rectifying urban development challenges related to excessive traffic and environmental contamination. For instance, under the country's smart city mission, the government aims to develop 100 smart cities with efficient public transportation systems, creating a conducive environment for mobility as a service (MaaS) adoption. As of the Smart Cities Mission Achievements, December, FY2024 report, the Smart Cities Mission has completed 7,380 out of 8,075 projects approximately 91% of the projects, with an investment of USD 18 billion (INR 1,47,704 crore) in these projects. The investment in these projects is fully focused on various aspects of urban development, including transportation, to innovate advanced and more livable urban spaces. Additionally, the government of India is making significant investments in advanced technology that is estimated to drive the growth in the mobility as a service (MaaS) market in India. For instance, in March FY2023, the Indian government made significant efforts in 6G research and development through its Bharat 6G Vision initiative. The vision aimed for India to be a frontline contributor in the design, development, and deployment of 6G technology by FY2030. Also, the Department of Telecom has facilitated the setting up of the 'Bharat 6G Alliance, an alliance of domestic industry, academia, national research institutions, and standards organizations to develop an action plan according to the Bharat 6G Vision.

Mobile Application Platform Segment is Holding Considerable Share of the India MaaS Market

The widespread adoption of smartphones and affordable internet connectivity is a major catalyst driving the mobility as a service (MaaS) in India. The study by the Ministry of Electronics and Information Technology Government of India published in January FY2025 indicated that the country has approximated 1.14 billion mobile cellular subscriptions. Various platforms like Ola, Uber, Rapido, and Yulu are offering various seamless integrated transportation modes which include including ride-hailing, bike-sharing, and public transit, all within a single app. Also, features like user-friendly design, real-time tracking, and cashless payment have significantly enhanced the commuting experience attracting a large customer base. Moreover, the growing demand for personalized and on-demand mobility solutions has further solidified the prominent share of mobile platforms in India's mobility as a service market.

Additionally, since India holds the second position in the app downloads market globally as per the Ministry of Electronics & Information Technology, it is anticipated that further growth and advancements in the mobile applications industry will significantly proliferate the mobility as a service market demand and growth in the forecast period.

Future Market Scenario (FY2025 - FY2032F)

- The growing urbanization and population rise along with the increasing solution demand for traffic congestion, and the need for efficient, eco-friendly mobility solutions is expected to fuel the mobility as a service market in India further boosted by the increasing demand for delivery services from online shopping trends.
- The India mobility as a service (MaaS) market is estimated to be driven by the increasing employment rate and rising disposable incomes in major Indian cities like Bengaluru, Hyderabad, Pune, and Noida which are hubs for information technology, manufacturing, and services

-Furthermore, the India Mobility as a Service (MaaS) market is advancing due to government support for urban development and smart city projects, alongside significant investments in advanced technology are anticipated to improve transportation systems.

-The widespread adoption of smartphones and affordable internet connectivity along with the growing advancements in mobile applications in India is anticipated to proliferate the growth of the mobility as a service market in the country.

Key Players Landscape and Outlook

The presence of a mix of both established players and emerging startups is dynamically and rapidly evolving the competitive landscape of the India mobility as a service (MaaS) market. Key players like Ola, Uber, and Rapido are holding significant shares of the ride-hailing segment, while new entrants such as BluSmart are focusing on electric vehicle (EV)-based services, aligning with India's push for green mobility. Public transit integration is also gaining traction, with startups like Chalo offering app-based solutions for bus and metro ticketing, real-time tracking, and multimodal trip planning.

With the growing innovation within the mobility sector by the key players to cater to the growing diverse needs of consumers, including last-mile connectivity, affordability, and convenience, the competitive landscape is expected to intensify in the forecast period. Additionally, partnerships with public transport authorities and private operators are becoming crucial to creating seamless mobility ecosystems and driving the market. For instance, in September 2023, Uber India Systems Private Limited announced its partnership with the Indian Navy to offer reliable, convenient, and safe mobility solutions for official travel and commute of naval officers, staff, and families across the country.

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- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available

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