



MARKET ANALYSIS OF ESCOOTERS



eSCURB: Electric scooters in urban environments: A study of safety, infrastructure, and mobility dynamics

WP1 A1.2: Analysis of the e-scooter market in the EU

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Ethical Declaration and Authorship Statement

We declare that this report is the result of the collective authorship of the project team. We declare that the report and its research was carried out in accordance with the principles of research, professional, and academic ethics, as well as with the requirements of the project, its funders, and the funding scheme. The project activities and its results were implemented within the framework of, and in compliance with, the project objectives, conditions, and the applicable rules of the funding agencies.

In preparing the project, we ensured the accuracy, traceability, and credibility of the presented data, consistently cited the sources used, and observed applicable legal and ethical standards. Appropriate scientific and professional sources were used in preparing the project report, and these are listed in the respective bibliographies or source lists. In doing so, we consistently respected copyright and the principles of proper source citation.

Generative artificial intelligence was also used as a support tool, exclusively for the following purposes:

- searching for and reviewing general information, especially regarding regulations and frameworks in other countries due to language barriers (tools: ChatGPT and Copilot);
- translating sources and texts from foreign languages and into foreign languages (primarily DeepL and Copilot);
- translating reports between Slovenian, Croatian, and English for reporting and inter-project communication purposes (primarily DeepL and Copilot);
- grammatical and stylistic proofreading of original texts created by the project team (tools: Grammarly and Copilot).

Generative artificial intelligence was not used for independently creating the substantive parts of the research or the project results, but solely as support in processing, understanding, and linguistically optimizing content, as well as for translation between the project languages.

Market analysis

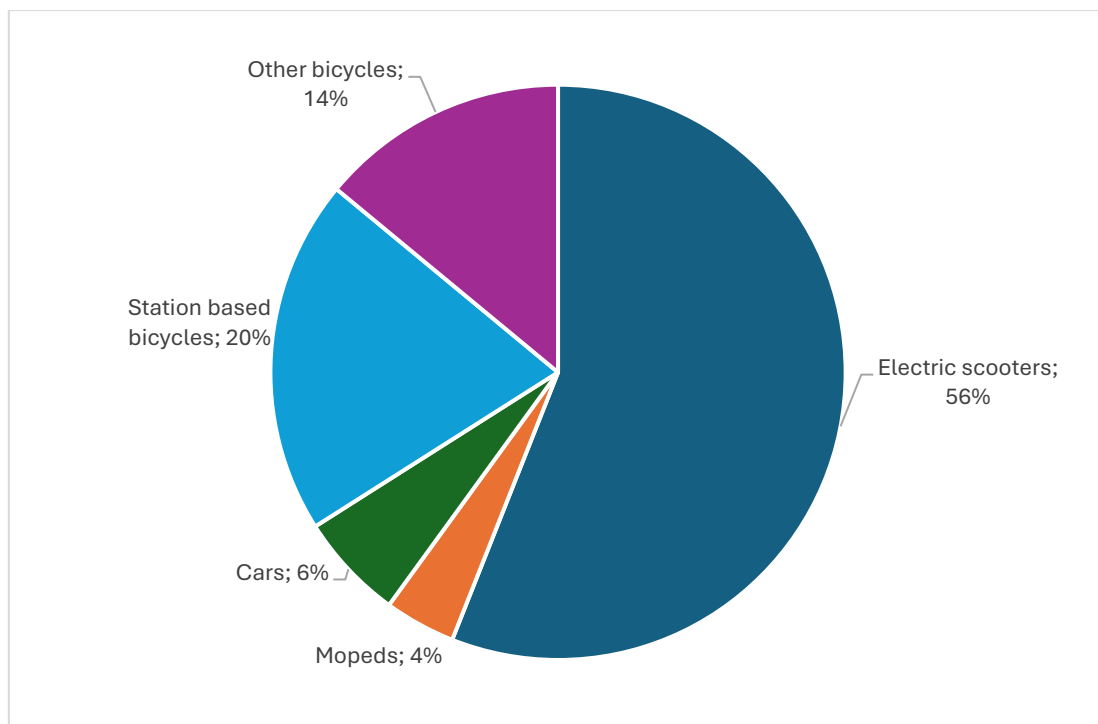
Market segmentation

The electric vehicle market is divided into:

- electric passenger vehicles,
- electric commercial vehicles,
- electric two-wheelers (motorcycles, mopeds, electric bicycles) and
- electric micromobility (light electric vehicles – e-scooters) .

The market analysis is limited to research on electric scooters, where only data on the shared use of electric scooters and other electric vehicles is available. Based on Statista data, the shared use of electric vehicles is increasing, with electric scooters accounting for the largest share of shared use.

Figure 1: Modal split in the electric vehicle sharing market in 2023

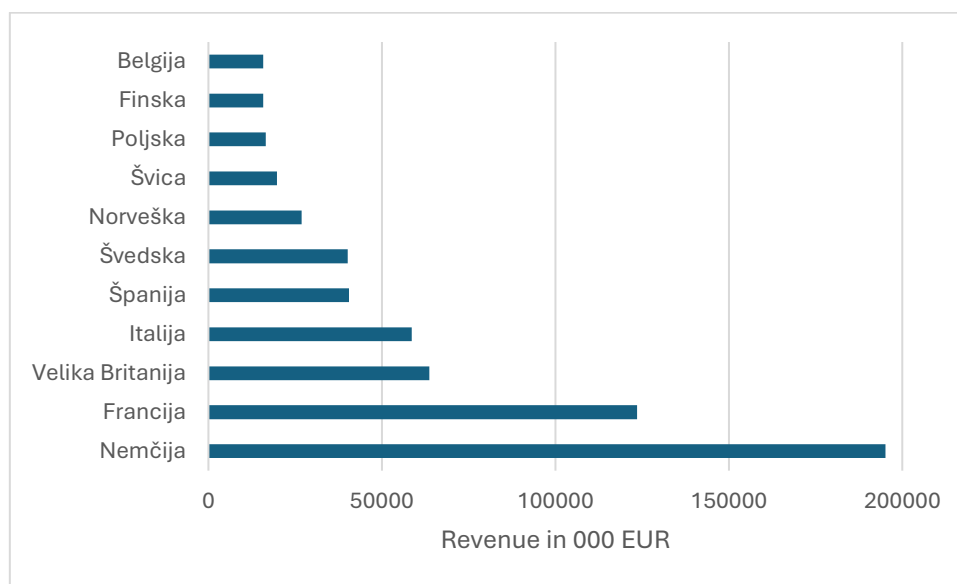


Source: Statista (2025a).

E-scooters in Europe

According to Statista (2025a) forecasts, the revenue of the electric scooter sharing market will continue to grow until 2030. In Europe, Norway, Sweden, and Germany represent the largest market in terms of user share. Germany also represents the largest market in Europe in terms of revenue in the electric scooter sharing market. The graph shows the countries with the highest revenue in 2023.

Figure 2: Revenue by country in the electric scooter sharing market in 2023

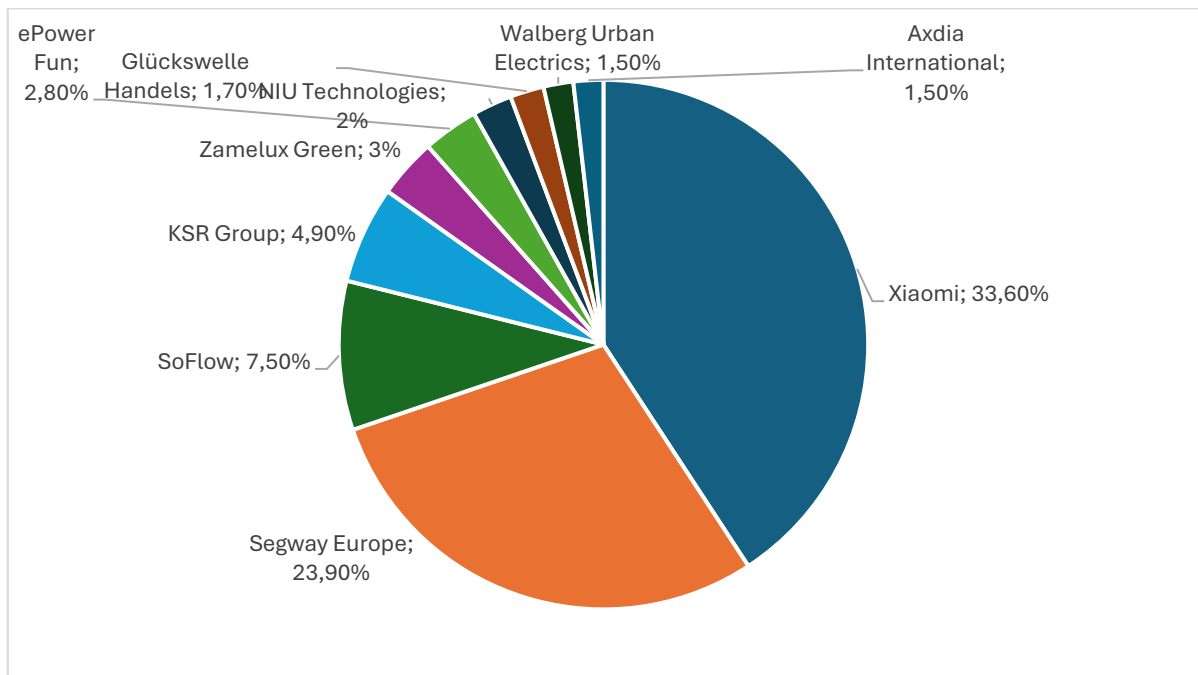


Source: Statista (2025a)

Xioami has the largest share among brands sold in Germany, followed by Sageway Europe and SoFlow.

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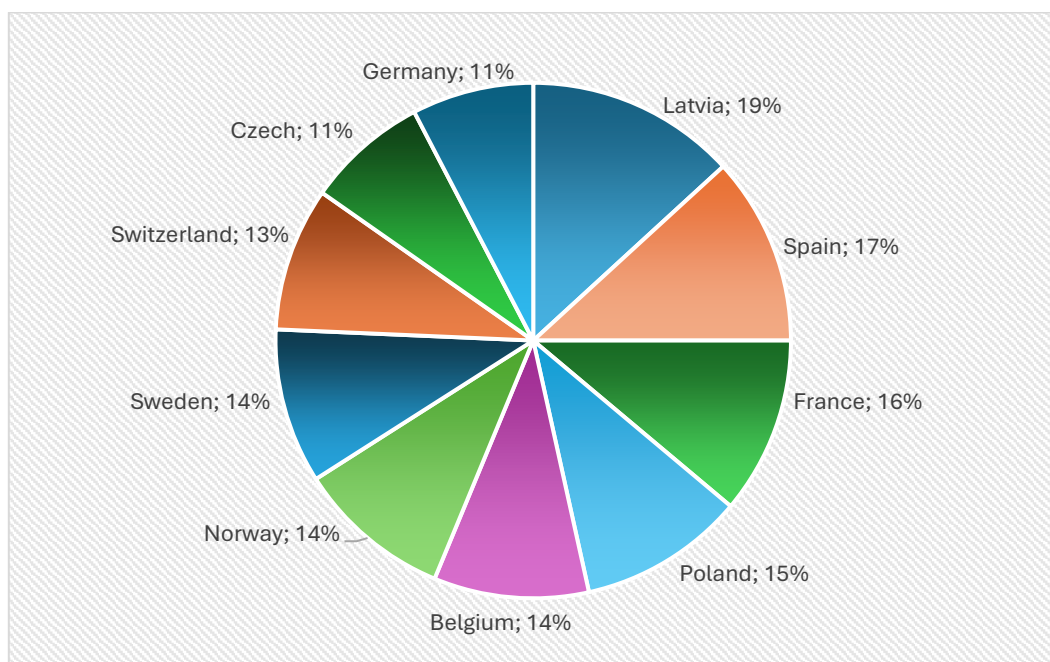
figure 3: Share of insured e-scooters in Germany in 2023 by brand



Source: Statista (2025a)

In addition to the shared use of electric scooters, the proportion of households with their own e-scooter is also an important piece of information. The graph shows the ten largest European countries.

Figure 4: Share of privately owned e-scooters by country in 2024

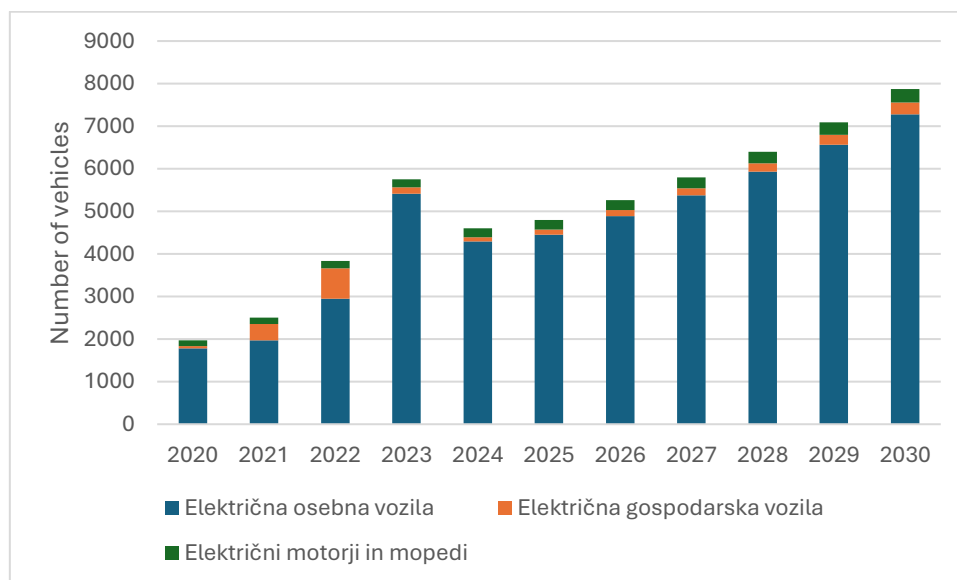


Source: Statista (2025a)

Overview of Slovenia and Croatia

According to Statista (2025b), the electric vehicle market in Slovenia is expected to generate approximately €279.1 million in revenue in 2025. Between 2025 and 2030, steady annual growth of 11.19% is expected, which would increase the market size to around €477.3 million by 2030. By the end of this period, sales are expected to reach approximately 7,870 electric vehicles. Internationally, China is expected to generate the most revenue, with the electric vehicle market reaching €519 billion in 2025. In Slovenia, the use of electric vehicles has grown rapidly in recent years, thanks in large part to government incentives and an increasingly developed and accessible charging infrastructure. The graph shows estimated sales of electric vehicles, excluding scooters, and sales forecasts until 2030.

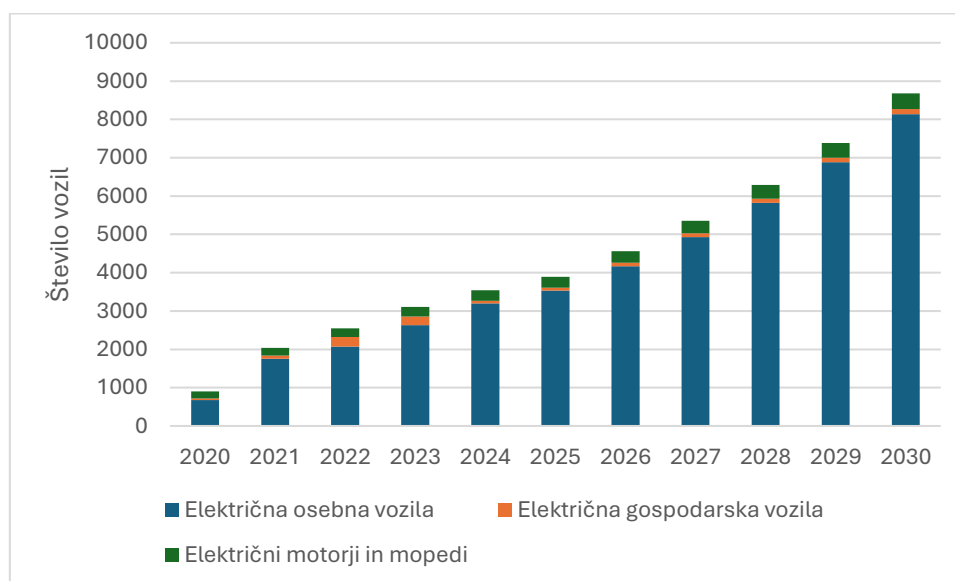
Figure 5: Sales of electric vehicles in Slovenia



Source: Statista (2025b)

Growth in sales of electric vehicles is also expected in Croatia. Similar to Slovenia, growth is more concentrated in the electric passenger vehicle segment.

Figure 6: Sales of electric vehicles in Croatia



Source: Statista (2025b)

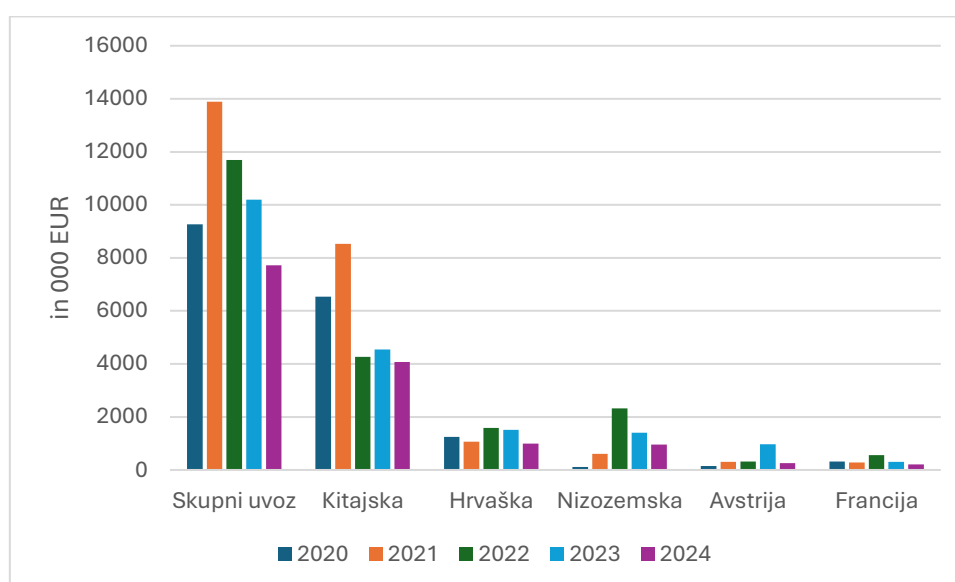
The electric vehicle market in Slovenia is constantly developing and growing. Buyers are increasingly opting for them due to their lower environmental impact, lower long-term costs, and government incentives such as subsidies and tax breaks. An important factor in this growth is the expansion of the charging infrastructure, which increases confidence in the use of electric vehicles, and the ever-widening range of models available due to increased competition among manufacturers. Market growth is further supported by local characteristics of Slovenia, such as short distances, well-developed public transport, and a focus on sustainable development, as well as favorable economic conditions and the active role of the state. Further growth in the use of electric vehicles is expected. Data on sales of electric scooters are not included, as sales data are not available.

Based on ITC statistics (2025), for the product group under CN code 87116090 – Motorcycles (including mopeds), bicycles, and similar vehicles with auxiliary engines, with electric drive motors (which includes electric scooters), we can see that imports of these products have been declining since 2021. Graph 7 shows the value of imports of motorcycles, bicycles, and similar vehicles with electric motors into Slovenia in the period 2020–2024, expressed in EUR 000. The total value of imports peaked in 2021 (13,885) and then gradually declined, reaching EUR 7,715 thousand in 2024, which indicates a noticeable decrease in the volume of imports in recent years.

China is by far the most important country of origin for Slovenia, although the value of imports has fallen sharply since 2021. Nevertheless, its share remains the largest over the entire period. Croatia is an important regional partner with relatively stable import values, but with a slight decline in 2024.

The Netherlands significantly increased the value of imports in 2022, indicating one-off or project-related deliveries, after which imports gradually declined. Austria and France are less important and fluctuate without a clear long-term trend. Overall, the data show China's dominance and a gradual decline in the total value of electric vehicle imports in Slovenia.

Figure 7: Import of motorcycles, bicycles, and similar vehicles with electric drive motors in Slovenia



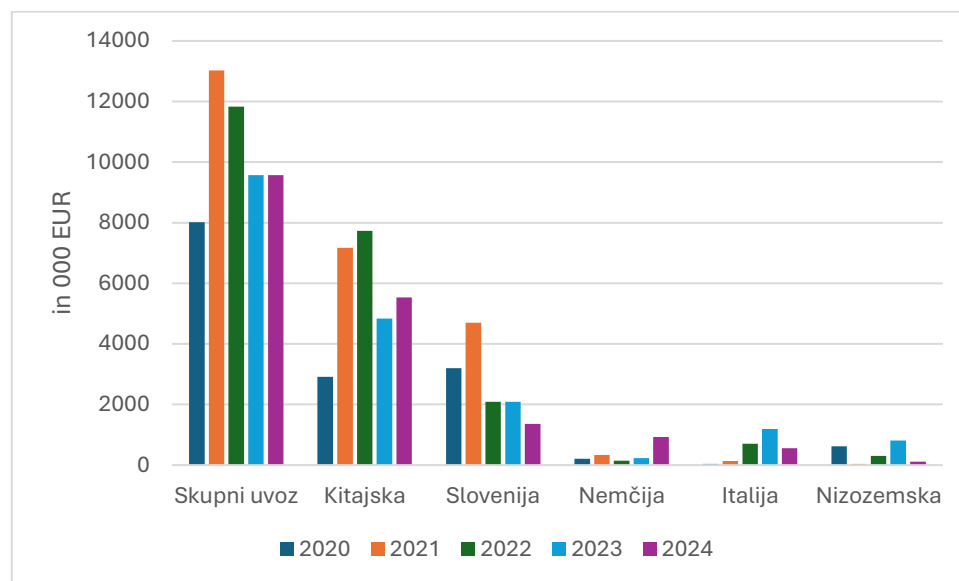
Source: ITC (2025)

Figure 8 shows the value of imports of motorcycles, bicycles, and similar vehicles with electric drive motors in Croatia in the period 2020–2024, expressed in EUR 000. The total value of imports peaked in 2021 (13,021), then declined in subsequent years, stabilizing at EUR 9,572 thousand in 2024.

China is the most important country of origin throughout the period, with imports growing strongly until 2022, then declining slightly but remaining the highest. Slovenia played an important role in the early years, but its importance declined significantly after 2021.

Germany and Italy have been increasing the value of their imports in recent years, indicating a greater role for European suppliers, while imports from the Netherlands are unstable and relatively low. Overall, the data show China's dominance and a gradual restructuring of import flows in the Croatian market.

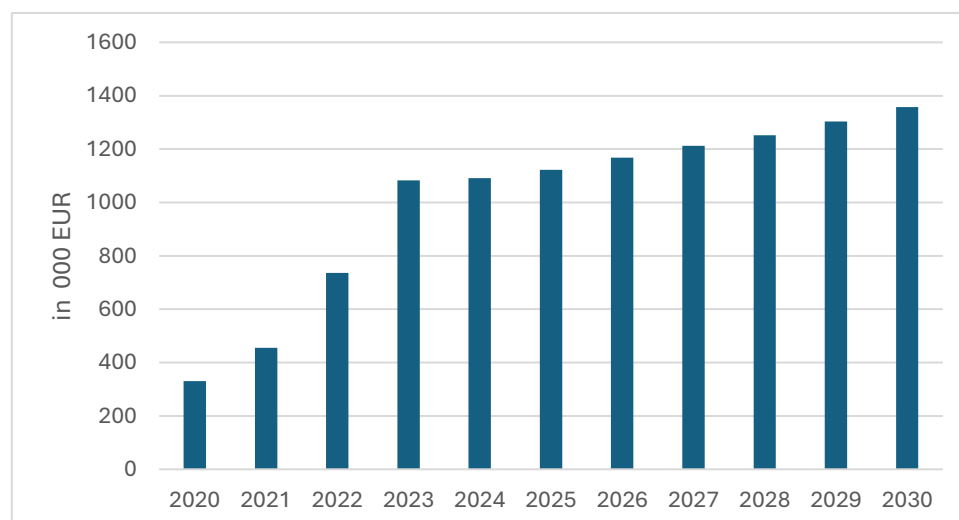
Figure 8: Import of motorcycles, bicycles, and similar vehicles with electric drive motors into Croatia



Source: ITC (2025)

In recent years, the electric scooter sharing market has become very interesting. According to Statista (2025c), the Slovenian electric scooter sharing market is expected to generate approximately €1.12 million in revenue in 2025. With an expected annual growth rate of 3.75%, the market value is expected to reach around €1.36 million by 2030. The number of users is expected to increase to approximately 95,000 by then, with the share of users growing from 3.8% in 2025 to 4.5% by 2030. The average revenue per user will be around €14, with total revenue generated through online channels by the end of the period.

Figure 9: Estimated revenue growth in the electric scooter sharing market

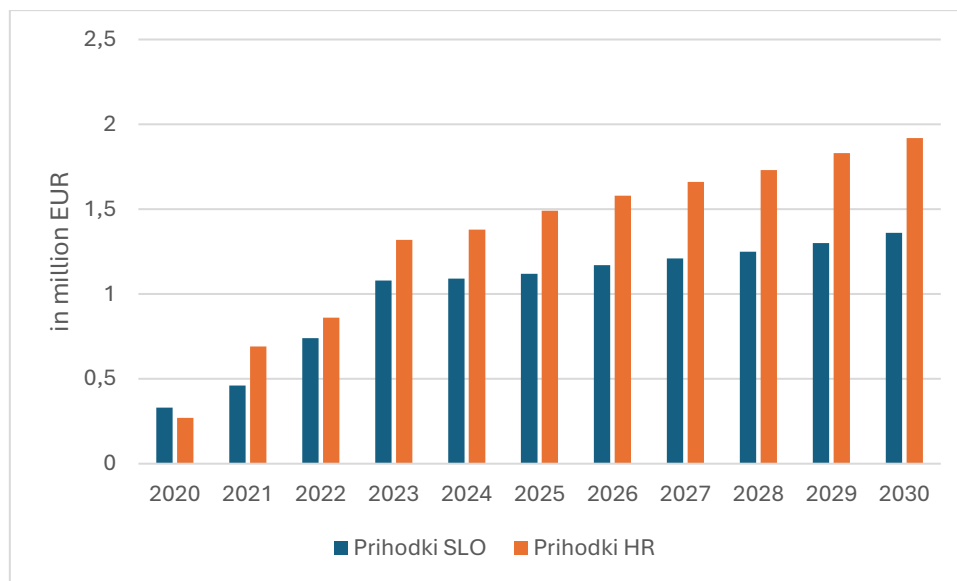


Source: Statista (2025c)

In Slovenia, the popularity of electric scooter sharing is growing, especially in larger urban centers such as Ljubljana and Maribor, where the service is becoming increasingly established and widespread.

Chart 10 shows stable revenue growth in both countries over the period 2020–2030. Slovenia is experiencing steady but slower growth, while Croatia has higher revenues and a faster growth rate throughout the period. The difference between the two countries will gradually increase after 2023 in favor of Croatia.

Figure 10: Comparison of revenue growth in the electric scooter sharing market between Slovenia and Croatia



Source: Statista (2025c)

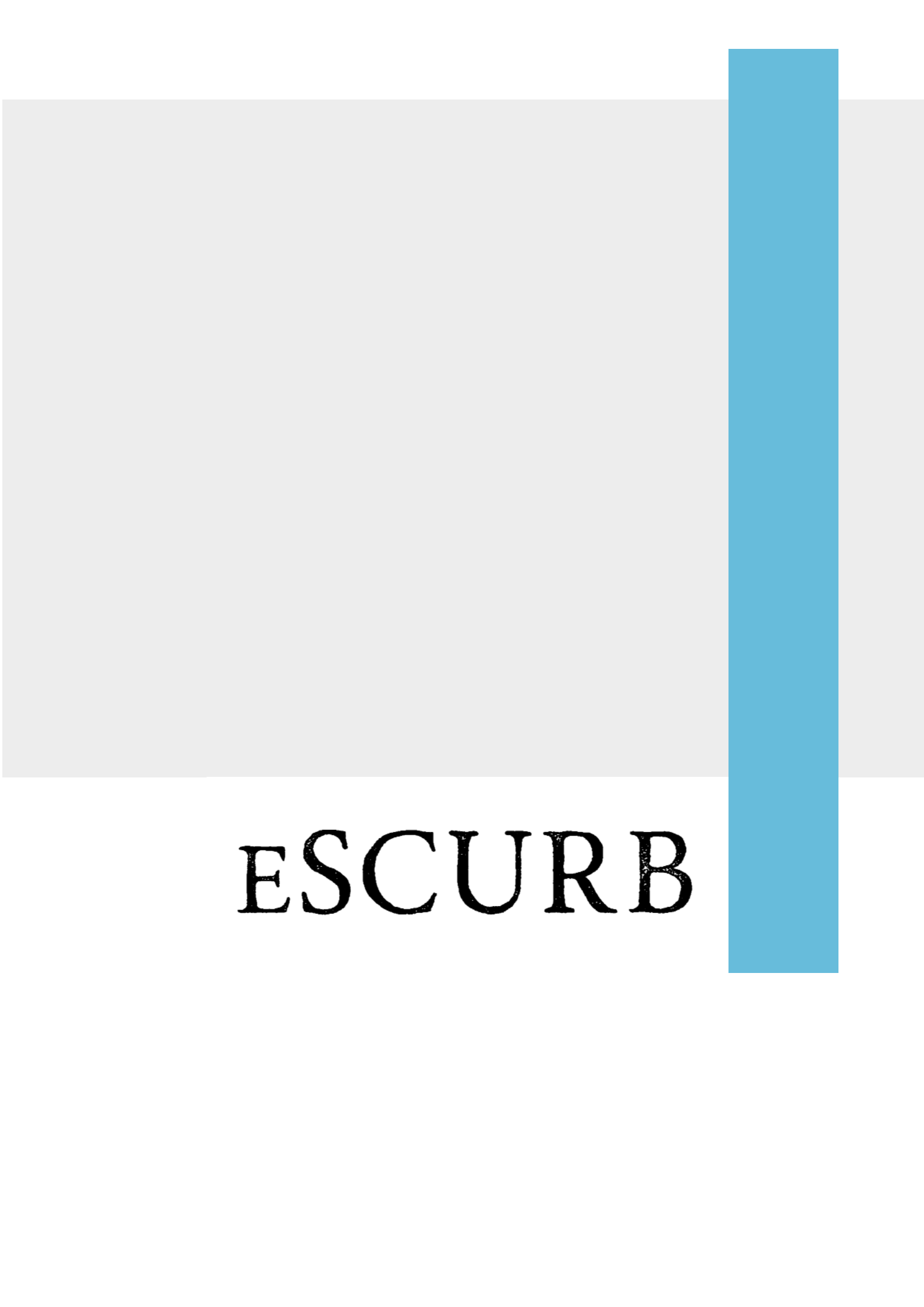
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