

THE STATE OF SWEDISH MICROMOBILITY 2026

MARKET ANALYSIS | SWEDEN | AUGUST 2026 | THE ELECTRIC COMPANY

E-bikes, e-scooters and mopeds class I and II. Demand, sales, fleet, electrification, geography, safety and market outlook.



**THE ELECTRICTM
COMPANY**

We build and operate infrastructure
for electric mobility.
From distribution to aftersales,
across Europe.

The state of Swedish micromobility

E-bikes, e-scooters and mopeds class I and II. Demand, sales, fleet, electrification, geography, safety and market outlook.

OVERALL DIAGNOSIS

In a format shift, not a decline. Moped class I is undergoing a technology shift from fossil fuel to electric. Geographically highly uneven. Under pressure from safety risks.

The overall market is not in general decline. Demand has shifted between vehicle formats: the e-bike is mature and robust, the e-scooter is expanding in use, and moped class I has a fleet that grew strongly until 2020 and has since plateaued. Class II is commercially active: according to new insurance data, the traffic-insured fleet is 25 percent larger than in 2021, with strong growth since the 2022 trough — but the fuel-type mix is unknown.

A complete county- and municipality-level analysis of the moped fleet for 2015–2025 changes the picture of where the market actually is. A breakdown by fuel type shows that moped class I is in practice two segments moving in opposite directions: a fossil-fuelled fleet in slight decline since 2020, and an electric fleet that has grown 773 percent since 2015 and alone accounts for all net growth since 2020.

94,000 e-bikes sold in the 2025 cycling year	106,170 moped class I in traffic 31 Dec 2025	10.0 moped class I per 1,000 inhabitants	14.7x difference between highest and lowest municipality
--	--	--	--

Report's key question

What is the state of health of Swedish micromobility, which parts of the market are actually strong, weak or hard to measure, and where in the country are they?

Data cutoff for regularly published sources: 28 August 2026. Supplementary insurance data from Svensk Försäkring/TFSY received in September 2026. Latest full-year data is 2025 unless otherwise stated. County and municipality data is own processing of Trafikanalys's statistical publication Fordon i län och kommuner (Vehicles by county and municipality), editions 2015–2025.

1. Summary: a market in format shift with sharp geography

Swedish micromobility shows high usage and continued electrification, but market health differs clearly between segments — and for the moped it differs even more between municipalities than between segments.

Overall assessment

Swedish micromobility is not in structural decline, but in a format shift and a geographic shift. The e-bike is mature and robust, private e-scooter use is growing but creating a rising injury burden, and moped class I is undergoing a slow technology shift from fossil fuel to electric that is strongly concentrated geographically.

The two clearest problems are the e-scooter's rapidly growing injury burden and the moped's stagnant new-vehicle market. The third, and least noticed, is that the moped market is in practice some twenty local markets with entirely different conditions.

Segment overview

Segment	Market signal	Data reliability	Diagnosis
E-bike	94,000 sold in 2025, about a third of all new bicycles	High	Healthy and mature
E-scooter	Usage growing and spreading geographically; national private sell-through data lacking	Medium for usage, low for sales	Expanding but under pressure
Moped class I – electric	In traffic 2015–2025: 1,766 → 15,415 vehicles (+773%); share of fleet 2.3% → 14.5%. The only sub-segment still growing since 2020.	High	Growing and electrifying, but with slowing growth rate
Moped class I – fossil fuel	In traffic 2015–2025: 73,912 → 90,755 vehicles; peaked in 2020 (94,200) and has since declined 3.7%.	High	Mature and in slight decline
Moped class II	Traffic-insured fleet 2021–2025: 54,058 → 67,759 (+25%, not monotonic), 45% of the combined traffic-insured fleet of moped class I and II in TFSY in 2025. Fuel-type breakdown unknown; not subject to registration.	Medium for fleet, low for other measures	Growing since the 2022 trough, narrowly measured

Source: Trafikanalys, Transportstyrelsen and Cykelbranschen, Svensk Cykling and Svensk Försäkring. [4] [8] [11] [12] [18] [24] [25]

Six conclusions

- The e-bike is the market's clearest stable core. While the total bicycle market has more than halved since 2015, e-bike sales have gone from 30,000 to 94,000 units and stayed between 86,000 and 103,000 every year since 2018.
- The e-scooter is a paradox segment: usage and geographic spread are increasing, while the number of injuries is rising rapidly. The decisive question, which no public source currently answers, is whether the risk per trip is actually increasing or whether the injury count is simply following exposure.
- Moped class I is not a shrinking segment overall, but the fossil-fuelled sub-segment is. The fleet in traffic grew from 75,678 to 106,170 vehicles between 2015 and 2025, and nearly 90 percent of the increase occurred before 2020. Since then, the fossil-fuelled fleet has declined 3.7 percent, from a peak of 94,200 (2020) to 90,755 (2025), while electric mopeds have grown 74 percent over the same period and account for all of the net increase.

- The moped market is extremely unevenly distributed geographically. Öckerö has 38.3 mopeds per 1,000 inhabitants, Malmö 2.6. The pattern does not follow city versus countryside but rather coastal and commuter municipalities versus dense urban centres and metropolitan suburbs. The report lacks data on income and housing type and cannot establish the cause.
- Moped class II is a significant and growing segment. The traffic-insured fleet increased from 54,058 vehicles in 2021 to 67,759 in 2025, at which point it accounted for 45 percent of the combined traffic-insured fleet of moped class I and II in TFSY. The underlying data completely lacks a breakdown by fuel type, which means it is not possible to determine what role electrification plays in the development.
- The electrification of moped class I is the fastest-growing part of an otherwise shrinking fossil-fuelled fleet. The share of electric mopeds in traffic has risen from 2.3 percent in 2015 to 14.5 percent in 2025, and the number of electric mopeds in traffic has increased 773 percent over the same period. The increase is strongly concentrated in Stockholm County, which has both one of the country's lowest moped densities (8.1 per 1,000 inhabitants, fourth-lowest of 21 counties) and the highest electric share in the country. The fossil-fuelled sub-segment, which still accounts for 85 percent of the fleet in traffic, should be regarded as the market's most challenged sub-segment: mature, without a growth driver of its own, and in decline since 2020.

2. How market health is assessed

Health is multidimensional. The report therefore does not combine different indicators into an artificial 0–100 score.

Dimension	What it measures	Why it is needed
Demand and usage	Actual usage, penetration, trips and fleet size	A market can be used more even if new sales temporarily fall
New sales	Registrations or industry sell-through where available	Shows the commercial pulse but is affected by inventory, regulation and campaigns
Geographic distribution	Where the fleet is located and how it changes locally	A national trend can hide opposite movements in different parts of the country
Price and competition	Price levels, price pressure and availability of alternatives	Determines market size and how easily margins are squeezed
Safety and regulation	Accidents, regulatory review and friction for the user	Strong usage is not synonymous with a healthy societal system
Data reliability	How directly and completely the data measures the segment	Ensures that a lack of statistics is not interpreted as market development

Data reliability

High means national register or established industry statistics with a clearly defined universe.

Medium means government studies or strong proxies that measure usage but not direct sales. Low

means a complete national series is lacking and the conclusion must be limited to what individual data points actually show.

Three methodological choices that shape the interpretation

1. Fleet figures are measured on 31 December

Trafikanalys's vehicle statistics report the fleet at year-end. For seasonal vehicles like mopeds, this is the worst possible measurement point: on 31 December 2025 there were 106,170 moped class I vehicles in traffic and, at the same time, 245,616 off the road. Nearly seven in ten registered class I mopeds were therefore off the road at the time of measurement.

The figure "fleet in traffic" should therefore be read as a winter observation, not as a measure of how many mopeds are actually used during the season. The report presents both figures throughout.

One exception is the fuel-type breakdown: contrary to what the winter observation might suggest, the electric share is consistently higher among mopeds in traffic (14.5 percent in 2025) than among those off the road (5.6 percent). Electric mopeds are thus, if anything, under-represented rather than over-represented among the vehicles the measurement point misses. See chapter 6.

2. Injury counts without a measure of exposure cannot be interpreted as risk

The number of people injured in e-scooter accidents is rising rapidly. At the same time, the number of vehicles and the number of trips are growing. Without a denominator — injuries per trip, per vehicle or per person-kilometre — it is not possible to distinguish "more dangerous vehicles" from "more vehicles".

The report therefore describes the development as a growing total injury burden and refrains from claiming that the risk per trip has increased. These are two different conclusions with different policy implications.

3. Population figures are derived from the same source

Municipal population figures are calculated from Trafikanalys's own table of passenger cars per 1,000 inhabitants, which makes the density measures internally consistent with the vehicle data. The method yields 10.61 million inhabitants for the country in 2025, which is within one per mille of Statistics Sweden's (SCB) population figure.

Vehicles are registered at the owner's home municipality. Density therefore measures where the owner lives, not where the vehicle is driven. For a parent who is registered as the owner of a teenager's moped, the vehicle is recorded at the parent's address.

3. The economy is improving, but does not explain the differences between segments

In June 2026, household consumption increased 4.3 percent by volume compared with June 2025. Retail sales rose 6.6 percent year-on-year over the same period, and discretionary retail rose 8.0 percent. [1] [2]

The National Institute of Economic Research's (Konjunkturinstitutet) barometer was above the normal level in July, with particularly strong trade. Households remained more cautious than businesses, including around larger purchases, but less pessimistic than before. [3]

Interpretation, with one caveat

The macro picture in 2026 is improving at the same time as developments diverge between vehicle categories. This suggests that the differences between segments are structural rather than cyclical.

The caveat is that the time periods do not match. The weak moped sales that need explaining occurred in 2025, while the consumption data above refers to 2026. Ruling out a cyclical explanation for 2025's weakness would require 2025 household data. The argument above therefore supports the picture of a format shift, but does not prove it.

4. E-bike: healthy, mature and structurally strong

The e-bike has become an established part of the Swedish bicycle market and is the best-documented sign of health within electric micromobility.

During the 2025 cycling year, 94,000 e-bikes were sold in Sweden. That was 5.1 percent fewer than in 2024, but the total bicycle market fell 14.7 percent that same year. The e-bike thus accounted for about 33 percent of all bicycles sold. [4]

The e-bike holds steady while the total bicycle market halves

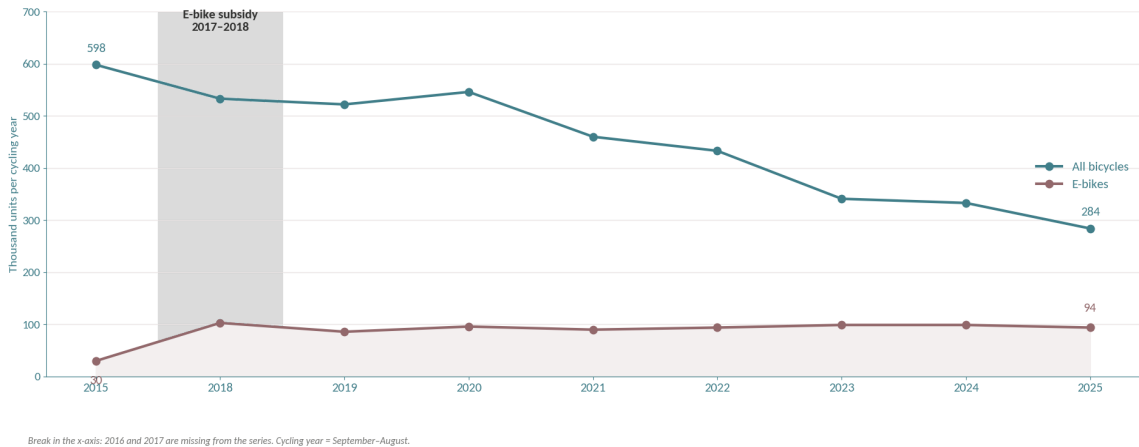


Figure 1. Swedish bicycle sales by cycling year, thousand units, 2015–2025.

Source: 2030-sekretariatet's Miljöbarometer, underlying data from Cykelbranschen and Svensk Cykling. Cycling year refers to September–August. [4]

Cycling year	Regular bicycles	E-bikes	Total	E-bike share
2015	568,000	30,000	598,000	5.0%
2018	430,000	103,000	533,000	19.3%
2019	436,000	86,000	522,000	16.5%
2020	450,000	96,000	546,000	17.6%

Cycling year	Regular bicycles	E-bikes	Total	E-bike share
2021	370,000	90,000	460,000	19.6%
2022	339,000	94,000	433,000	21.7%
2023	242,000	99,000	341,000	29.0%
2024	234,000	99,000	333,000	29.7%
2025	190,000	94,000	284,000	33.1%

Table 1. Source: same series as Figure 1. The years 2016 and 2017 are missing from the published series. [4]

The 2018 peak should not be read as organic demand

The series has a clear bump in 2018 at 103,000 units, followed by a drop to 86,000 in 2019. The period coincides with the state electric-vehicle subsidy that applied during 2017 and 2018 and was phased out at the turn of 2018/2019. Before using the bump as a reference point for what the market can achieve without support, the connection should be verified against the subsidy's disbursement statistics.

This has practical significance for how a future decline should be interpreted. A reasonable warning threshold is not “below 90,000”, since that level was already passed in 2019 without breaking the plateau. Two consecutive cycling years clearly below the observed post-2018 plateau would, however, be a first strong sign of a structural break downward.

Health diagnosis: healthy and mature

The total bicycle market went from 598,000 units in 2015 to 284,000 in 2025, a decline of 52.5 percent. The e-bike grew over the same period from 30,000 to 94,000, an increase of 213 percent. A market that stays between 86,000 and 103,000 units per year through a halving of the underlying category should be described as mature and robust, not as structurally weak.

5. E-scooter: expanding usage, growing injury burden

The e-scooter is likely one of Sweden's most used forms of micromobility, but private new sales lack a national sell-through series.

Trafikanalys describes a sharp expansion of privately owned electric single-person vehicles in recent years. Accident data at the same time shows a clear geographic spread: from around ten municipalities per year in 2016–2018 to 213 of 290 municipalities in 2023. [6] [7]

6,624 injured in 2025	7 killed in 2025	+38% more accidents than in 2024	1,746 injured riders aged 17 or younger
---------------------------------	----------------------------	--	---

Source: Transportstyrelsen (Swedish Transport Agency), accident statistics 2025. The +38 percent figure refers to the number of accidents involving an e-scooter, not the number of people injured; the two measures are not directly comparable. [8] [10]

Transportstyrelsen notes that the increase is also visible in smaller towns without rental schemes, which the agency interprets as an indication of increased private ownership. Almost half of those seriously injured are under 25, and about two-thirds are male. [8]

In July 2026, Transportstyrelsen announced that the rules for e-scooters are being reviewed in light of the accident trend. [9]

Injury burden is not the same as risk

There is no public series on the number of privately owned e-scooters or the number of trips. It is therefore not possible to calculate injuries per trip or per vehicle, and therefore not possible to determine whether the vehicle has become more dangerous or simply exists and is used more.

What is actually established, and what is not

Established: the total injury burden from e-scooters is growing rapidly, it is spreading geographically, and those injured are younger than in traffic overall. That alone is sufficient to justify a regulatory review, since the societal cost follows the absolute number injured.

Not established: that the risk per trip has increased. If the fleet and the number of trips have grown faster than the injury count, the risk per trip may in fact have fallen even as the injury burden has risen. Both can be true at the same time.

This is the report's single most important data gap alongside sell-through, and it is addressable: a measure of exposure could be derived from travel surveys or from the sharing operators' aggregated trip data.

The sharing market is the measurable commercial part

The analysis above concerns privately owned vehicles. The commercial rental market has an entirely different data structure: operators work under municipal permits, with regulated fleet sizes and parking rules, and report trip volumes to the municipalities. Since the 2022 change in the law on pavement parking, and since several major cities introduced caps on the number of vehicles, the market has consolidated.

For a complete market picture, the sharing segment should be analysed separately using municipal permit data as the primary source. That analysis falls outside the scope of this report and is noted as an identified gap.

Market structure is strongly seasonal

Trafikanalys describes usage as clearly seasonal: it rises in spring, peaks in summer, and is low in winter. Retailer interviews in the same survey pointed to tougher price competition, including from international e-commerce, but continued underlying demand. [5]

Health diagnosis: expanding but under pressure

The demand and usage signal is positive. System health is not. The rapidly growing injury burden is the most acute negative indicator in Swedish micromobility and could trigger regulation affecting both product availability and usage, regardless of how the risk per trip develops.

6. Moped class I: a fleet that grew strongly and then plateaued

The registration-required moped is often described as a segment in decline. The complete fleet series for 2015–2025 shows something else.

Moped class I: the fleet grew strongly to 2020 and has plateaued since

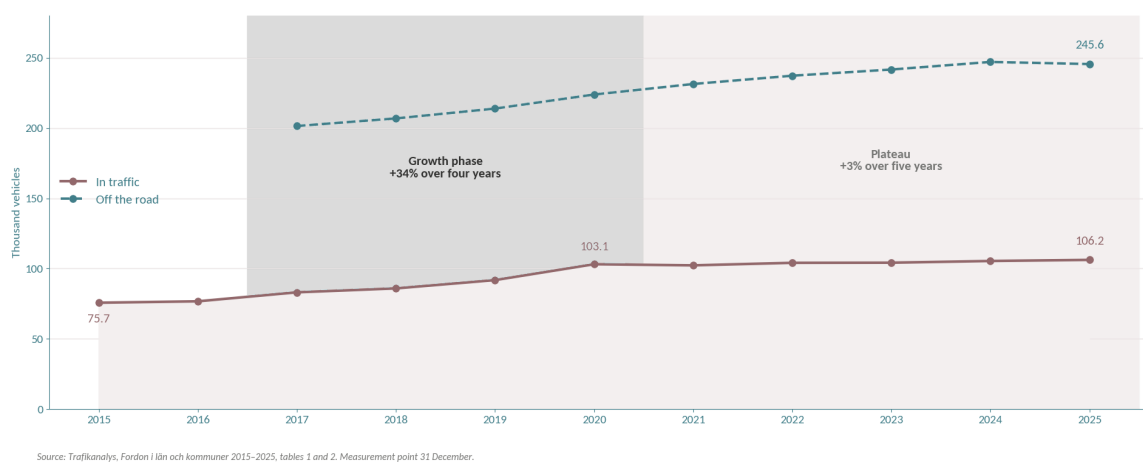


Figure 2. Moped class I in traffic and off the road, nationally, thousand vehicles, 2015–2025.

Source: own processing of Trafikanalys, Fordon i län och kommuner, editions 2015–2025, tables 1 and 2. Off-the-road figures are only reported from 2017 onward. [24]

Year	In traffic	Off the road	Total registered	Per 1,000 inhabitants
2015	75,678	–	–	7.7
2016	76,704	–	–	7.7
2017	83,079	201,525	284,604	8.2
2018	85,878	206,938	292,816	8.4
2019	91,837	213,860	305,697	8.9
2020	103,071	223,871	326,942	9.9
2021	102,301	231,445	333,746	9.8
2022	104,136	237,275	341,411	9.9
2023	104,198	241,711	345,909	9.9
2024	105,351	247,099	352,450	9.9
2025	106,170	245,616	351,786	10.0

Table 2. Source: own processing of Trafikanalys, Fordon i län och kommuner 2015–2025. Measurement point 31 December. Population figures derived from the same publication's table of passenger cars per 1,000 inhabitants. [24]

Two phases, not one trend

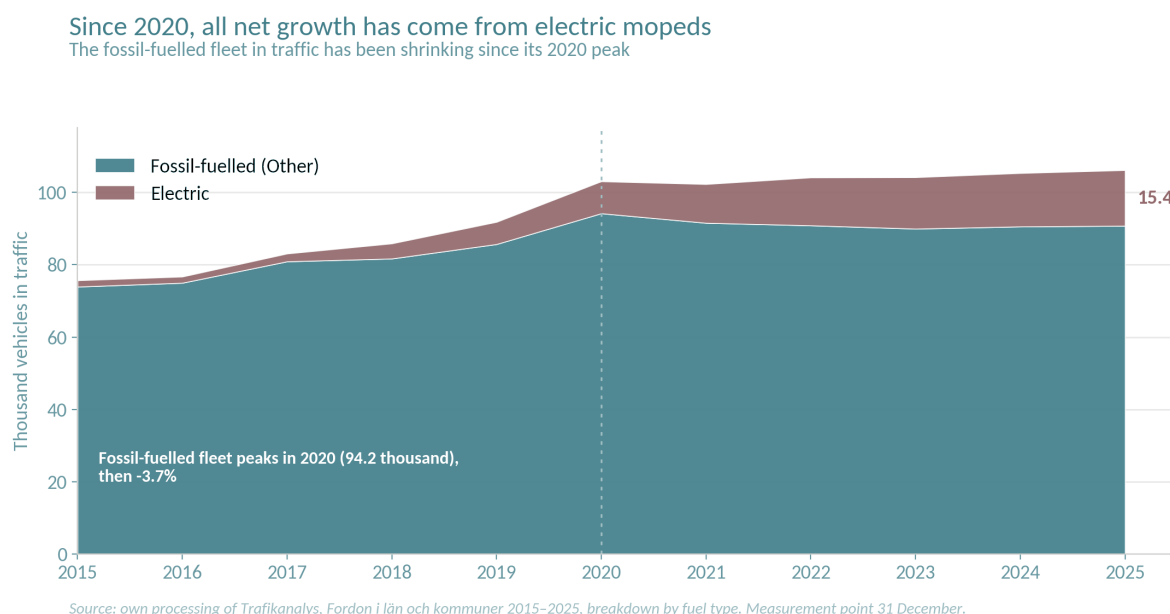
The series clearly splits into two periods. Between 2016 and 2020 the fleet in traffic grew 34 percent, from 76,704 to 103,071 vehicles. Between 2020 and 2025 it grew 3 percent, from 103,071 to 106,170. Measured per inhabitant, density rose from 7.7 to 9.9 during the first period and has since held steady around 10.0.

This is a classic maturity curve and a substantially different story from “weak market”. The fleet is 40 percent larger in 2025 than in 2015. What has stopped is growth, not the market.

Fleet in traffic broken down by fuel type

Breaking the fleet down by fuel type reveals a clearer and more challenging picture than the total series shows. The fossil-fuelled fleet in traffic already peaked in 2020 at 94,200 vehicles and has since declined 3.7 percent, to 90,755 vehicles in 2025. All of the growth since 2020, and then some, is electric: electric mopeds in traffic have grown from 8,871 to 15,415 vehicles over the same period. Without electrification, the total fleet in traffic would have shrunk since 2020, not plateaued.

Figure 2c. Fleet in traffic for moped class I, fossil-fuelled and electric, nationally, thousand vehicles, 2015–2025.



Source: own processing of Trafikanalys, Fordon i län och kommuner 2015–2025, breakdown by fuel type. Measurement point 31 December.

It is the fossil-fuelled part of moped class I, not the segment as a whole, that should be regarded as the market’s problematic sub-segment: mature, in a slight but unambiguous decline, and without a growth driver of its own. The electric moped is the opposite — small, but the only part of the fleet still expanding.

Electrification is the fastest-moving part of an otherwise static fleet

While the total fleet has plateaued since 2020, the fuel-type mix has continued to change rapidly. The share of electric moped class I vehicles in traffic has risen from 2.3 percent in 2015 to 14.5 percent in 2025. Electric mopeds in traffic increased over the same period from 1,766 to 15,415 vehicles, an increase of 773 percent, corresponding to an average annual growth rate of just over 24 percent, compared with about 3.4 percent per year for the total fleet over the same period.

The electric share is twice as high among mopeds in traffic as among those off the road

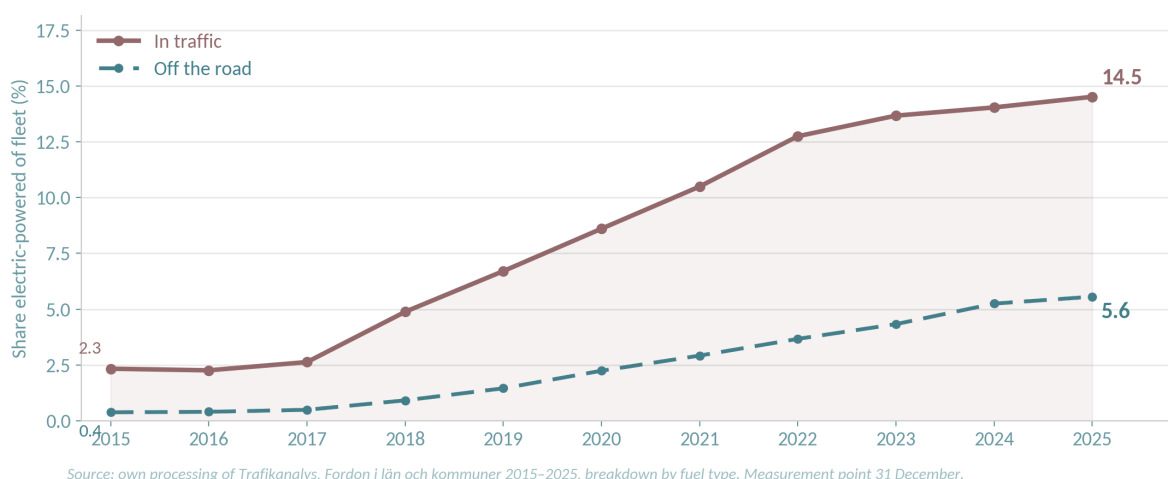


Figure 2b. Electric share of moped class I, in traffic and off the road, nationally, 2015–2025.

Source: own processing of Trafikanalys, Fordon i län och kommuner 2015–2025, breakdown by fuel type. Measurement point 31 December.

The growth rate for electric mopeds has itself slowed, from as much as 92 percent in a single year (2018) to 4–7 percent annually in 2023–2025. This is still substantially faster than the near-zero growth of the total fleet, but the first phase of hyper-growth is over for the electric segment too.

Year	Electric share in traffic	Electric share off the road	Electric mopeds in traffic
2015	2.3%	0.4%	1,766
2017	2.6%	0.5%	2,186
2019	6.7%	1.5%	6,160
2021	10.5%	2.9%	10,739
2023	13.7%	4.3%	14,247
2025	14.5%	5.6%	15,415

Table 2b. Source: own processing of Trafikanalys, Fordon i län och kommuner 2015–2025, breakdown by fuel type per municipality and year.

The ownership structure of electric mopeds has meanwhile normalised sharply. In 2015, 90 percent of electric mopeds in traffic were owned by legal entities — a sign that the technology at the time spread mainly through companies, fleets and rental. In 2025 that share is 26 percent, still higher than the total fleet's 16 percent corporate ownership, but converging rapidly toward an ordinary privately owned consumer vehicle.

Seven in ten mopeds are off the road at the time of measurement

At the end of 2025 there were 245,616 off-the-road moped class I vehicles against 106,170 in traffic, a ratio of 2.3. The total registered fleet is thus nearly 352,000 vehicles. The number off the road has increased 22 percent since 2017, faster than the number in traffic.

A growing off-the-road fleet can be interpreted in two ways, and the data does not distinguish between them. Either worn-out vehicles are accumulating and never being deregistered, which

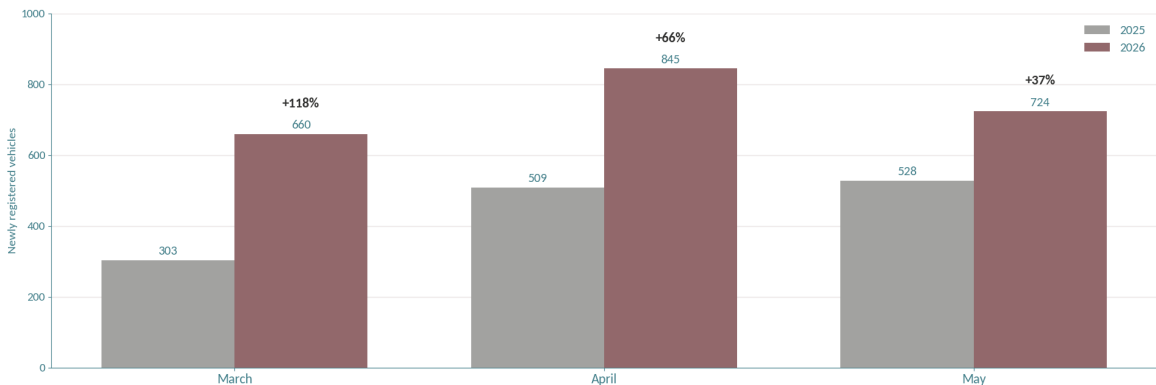
would be a sign of weakness. Or seasonal off-road status is growing in step with the fleet, which would be neutral. The age distribution in the road traffic register could settle the question and is recommended as the next analytical step.

December 2024 complicates the year-on-year comparison

Statistics Sweden's (SCB) database states that the increase in December 2024 was affected by the fact that certain motorcycles and mopeds with an emissions class below Euro 5 needed to be registered and put into traffic no later than 31 December 2024. This means a raw full-year comparison between 2024 and 2025 contains a one-off regulatory effect. [16]

The effect cuts both ways. It inflated 2024 and depressed 2025, which makes 2025 an artificially low comparison year for the year-on-year figures reported for spring 2026 below.

Spring's upturn starts from a very low base and slows month by month



2025 levels are derived from the published year-on-year changes. Three months correspond to about 2% of the fleet.

Figure 3. Newly registered moped class I, March to May, 2025 and 2026.

Source: Trafikanalys monthly statistics. The 2025 levels are derived from the published year-on-year changes and are therefore rounded. [13] [14] [15]

The spring upturn is real but should be read with caution. The growth rate slows sharply month by month, from 118 to 66 to 37 percent, and the volume falls from 845 to 724 vehicles between April and May. The three months together comprise 2,229 vehicles, corresponding to about 2 percent of the fleet in traffic. At that order of magnitude, individual delivery batches can produce double-digit percentage swings.

Health diagnosis: two opposing movements, not one

Fossil-fuelled: the fleet peaked in 2020 at 94,200 vehicles and has since declined 3.7 percent, to 90,755 in 2025. This, not the segment as a whole, is micromobility's most challenged sub-segment — mature, without a growth driver of its own, and in a slight but unambiguous decline.

Electric: electric mopeds in traffic have grown 773 percent since 2015, to 15,415 vehicles and 14.5 percent of the fleet in 2025. It is the only sub-segment still showing clear growth, albeit at a slowing annual rate (4–7 percent in 2023–2025).

Taken together, moped class I is not one uniform segment but two, moving in opposite directions: a mature and shrinking fossil-fuelled fleet, and a small but growing electric one. The interesting movement is the technology shift and the geography, not the national total.

New registrations turned upward in spring 2026 from a low and regulation-affected comparison year. No fuel-type breakdown is published for new registrations, so it is not possible to determine how much of the rebound is electric.

7. The geography of the moped: a national figure that hides twenty markets

The national plateau hides significant local movements. County and municipality data from the road traffic register shows a market that is far more unevenly distributed than any other segment in this report.

County level: density varies more than threefold

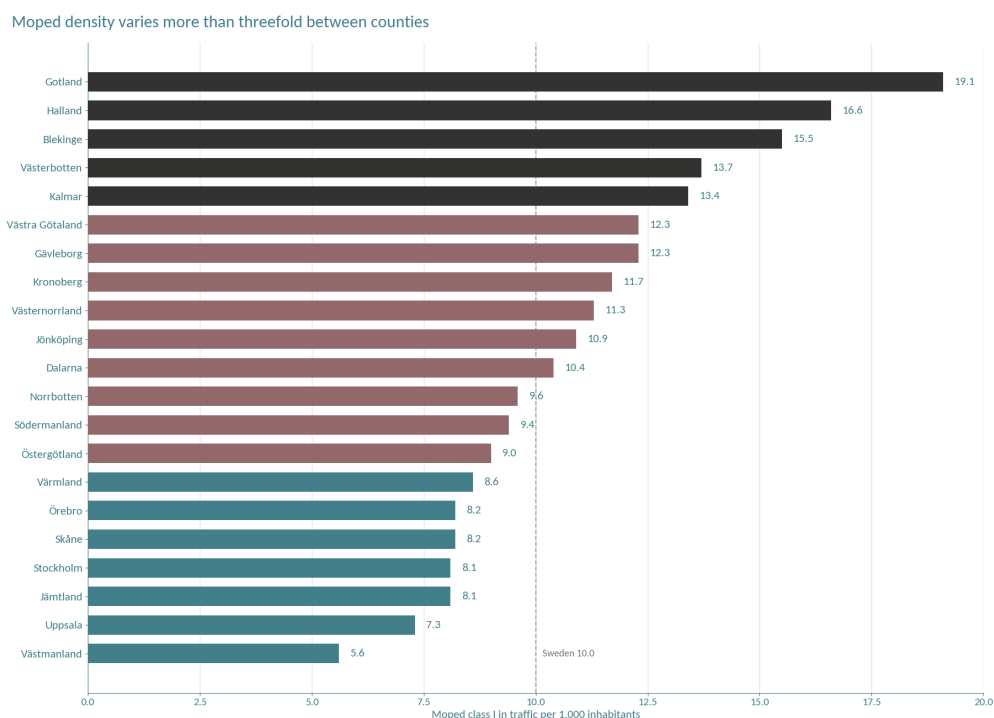


Figure 4. Moped class I in traffic per 1,000 inhabitants, by county, 2025.

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2025*, tables 1 and 3. [24]

Gotland has 19.1 moped class I vehicles per 1,000 inhabitants, Västmanland 5.6. The national average is 10.0. Several of the top counties are coastal: Gotland, Halland, Blekinge, Västerbotten and Kalmar. At the bottom are Västmanland, Uppsala, Jämtland, Stockholm and Skåne.

Stockholm's and Skåne's low density is consistent with a possible effect of dense public transport, but the report does not test that explanation. The interesting point is that Stockholm County has, at the same time, grown clearly the most since 2015, at 73.7 percent versus 40.3 percent nationally. The metropolitan county thus has one of the country's lowest densities and the highest growth.

Eight counties are shrinking while twelve are growing

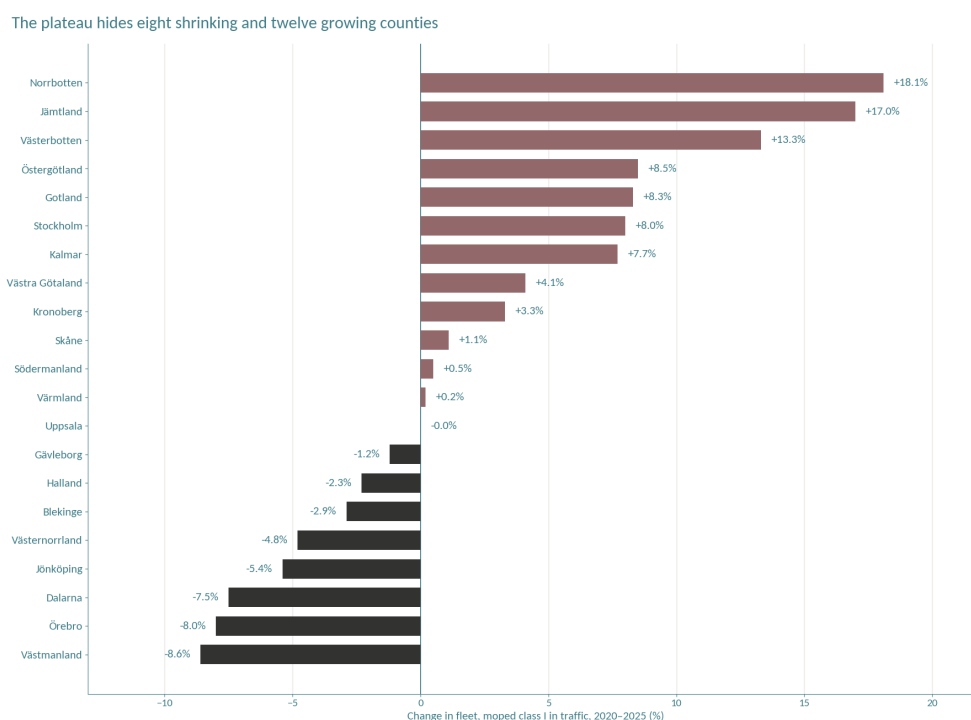


Figure 5. Change in moped class I fleet in traffic by county, 2020–2025.

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2020 and 2025*, table 1. [24]

Since the plateau began in 2020, eight counties have reduced their moped fleet, twelve have increased it, and one is unchanged. The range runs from Norrbotten at plus 18.1 percent to Västmanland at minus 8.6 percent — a difference of almost 27 percentage points within a national trend of plus 3.0 percent.

Three of the four northernmost counties are growing fast: Norrbotten, Jämtland and Västerbotten are at plus 13 to 18 percent. The fourth, Västernorrland, is shrinking instead, by 4.8 percent, which shows that northern Sweden is not moving uniformly either. The other shrinking counties are mainly in Bergslagen and inland Götaland: Västmanland, Örebro, Dalarna and Jönköping.

Why this matters in practice

A national growth figure of 3 percent would be almost useless for planning for a dealer or importer. The difference between operating in Norrbotten and in Västmanland is the difference between a growing and a shrinking market.

For a municipality or region planning infrastructure and traffic-safety work, the same conclusion is relevant: the moped fleet is developing in different directions in different parts of the country.

Municipality level: the difference is fifteenfold

Ten highest and ten lowest municipalities differ by a factor of fifteen

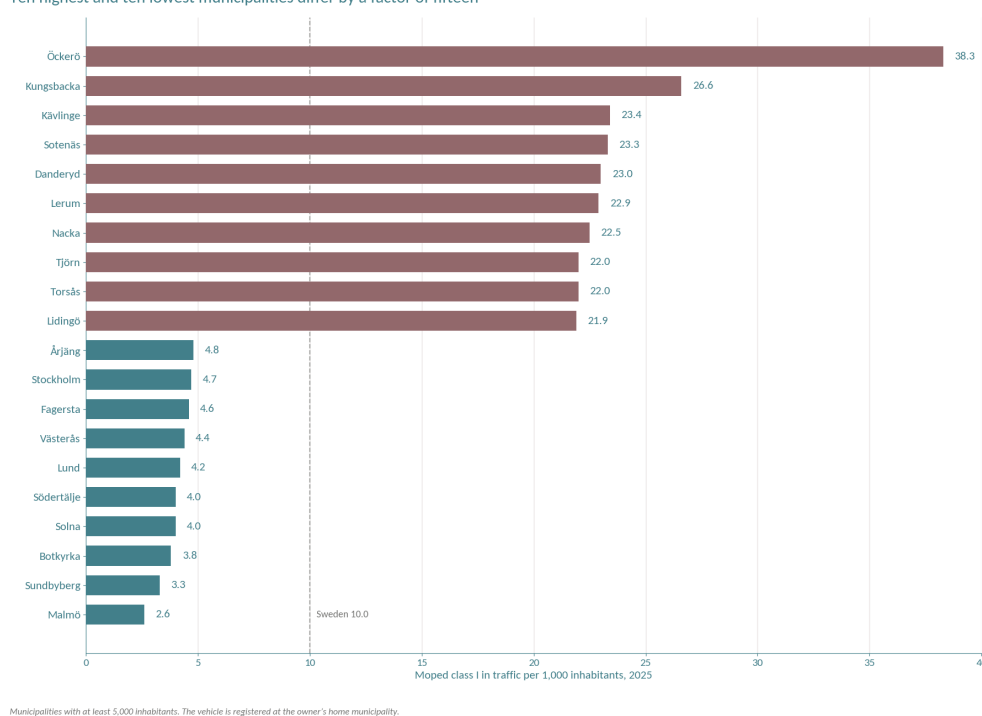


Figure 6. Ten highest and ten lowest municipalities, moped class I per 1,000 inhabitants, 2025.

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2025*, tables 1 and 3. Municipalities with at least 5,000 inhabitants, 273 of 290. [24]

Öckerö has 38.3 moped class I vehicles per 1,000 inhabitants. Malmö has 2.6. The difference is nearly fifteenfold and considerably larger than the difference between any of the segments this report otherwise compares.

The pattern does not follow city versus countryside. At the top are archipelago, coastal and commuter municipalities: Öckerö, Kungsbacka, Kävlinge, Sotenäs, Danderyd, Lerum, Nacka, Tjörn and Lidingö. At the bottom are the dense urban centres Malmö, Stockholm, Lund and Västerås, as well as metropolitan suburbs such as Botkyrka, Södertälje, Sundbyberg and Solna. The report contains no data on income, housing type or parking availability and therefore cannot establish which factor drives the difference.

The clearest contrast is found within a single county

Municipality in Stockholm County	Mopeds in traffic	Per 1,000 inhabitants
Danderyd	750	23.0
Nacka	2,561	22.5
Lidingö	1,062	21.9
Vaxholm	206	17.7
Täby	1,158	14.8
Huddinge	1,019	8.9
Järfälla	440	4.9
Stockholm	4,685	4.7
Södertälje	415	4.0
Botkyrka	370	3.8
Sundbyberg	188	3.3

Table 3. Selection of municipalities in Stockholm County. Source: own processing of Trafikanalys, *Fordon i län och kommuner 2025*. [24]

Within Stockholm County the range runs from 23.0 in Danderyd to 3.3 in Sundbyberg, a factor of almost seven. Climate and regulation are largely shared within the county, while public-transport provision, housing type and parking availability vary, which points to other explanations. However, the report lacks data on housing type, parking availability and household income, so the following are hypotheses rather than established causes: access to private parking and storage, distance to the nearest metro or commuter-rail station, and household purchasing power.

The pattern is consistent with the hypothesis that moped class I in the metropolitan region functions in practice as a house- and townhouse product rather than an inner-city product — but this is not proven with the data the report has. If the hypothesis is correct, it has direct consequences for how dealer networks and marketing should be sized.

The geography of the electric moped: the reverse picture

The map of electrification does not follow the map of volume. Stockholm County has one of the country's lowest moped densities (8.1 per 1,000 inhabitants) but by far the highest electric share: 24.9 percent of mopeds in traffic are electric, versus 14.5 percent nationally and 9–17 percent in other counties. The difference holds regardless of which type of Stockholm municipality one looks at.

County	Electric mopeds in traffic, 2025	Electric mopeds per 1,000 inhabitants	Electric share of moped fleet
Stockholm County	5,012	2.0	24.9%
Kronoberg County	394	1.9	16.6%
Jämtland County	147	1.1	13.8%
Skåne County	1,580	1.1	13.4%
Västra Götaland County	2,903	1.6	13.2%
Västernorrland County	350	1.5	12.8%

County	Electric mopeds in traffic, 2025	Electric mopeds per 1,000 inhabitants	Electric share of moped fleet
Norrbottn County	292	1.2	12.3%
Kalmar County	396	1.6	12.0%
Uppsala County	358	0.9	11.9%
Östergötland County	508	1.1	11.9%
Dalarna County	333	1.2	11.2%
Värmland County	269	1.0	11.1%
Södermanland County	312	1.0	11.1%
Halland County	624	1.8	10.8%
Jönköping County	431	1.2	10.7%
Västerbotten County	401	1.4	10.5%
Örebro County	256	0.8	10.1%
Blekinge County	236	1.5	9.7%
Gotland County	111	1.8	9.6%
Västmanland County	146	0.5	9.4%
Gävleborg County	324	1.1	9.3%
Sweden	15,415	1.5	14.5%

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2025*, breakdown by fuel type per county.

Both the Stockholm municipalities that top the national density ranking (Danderyd, Nacka, Lidingö) and the densely built, lower-density municipalities in the same county (Solna, Stockholm, Sundbyberg) have electric shares of 24–46 percent — clearly above the coastal and commuter municipalities that otherwise dominate moped volumes nationally, such as Kungsbacka, Öckerö, Kävlinge, Sotenäs and Tjörn, all of which are at or below the national average.

Municipality	Mopeds in traffic	Electric share
Solna	349	45.6%
Danderyd	750	42.3%
Nacka	2,561	39.7%
Lidingö	1,062	37.2%
Stockholm	4,685	36.2%
Malmö	968	28.1%
Kungsbacka	2,300	14.3%
Öckerö	491	14.3%
Kävlinge	762	10.5%
Sotenäs	211	10.0%
Tjörn	352	8.8%

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2025*, breakdown by fuel type per municipality. Selection: municipalities already appearing in the chapter's other tables and figures.

This adds nuance to the picture above: volume differs by municipality type, but electrification is primarily a Stockholm phenomenon — regardless of whether the Stockholm municipality in question has high or low moped density. It is the same county that already has the highest growth since 2015 (73.7 percent, see above). Stockholm thus appears to represent the structural leading edge — fewer mopeds per inhabitant, but faster fleet growth and a markedly higher electric share — while the volume base in coastal and commuter municipalities is still dominated by the traditional combustion vehicle.

Concentration

The twenty largest municipalities account for 31.8 percent of the country's moped fleet in traffic, and the three largest counties — Västra Götaland, Stockholm and Skåne — for 50.7 percent. At the same time, 38 percent of municipalities are below the national average in density, which means the fleet is concentrated in populous counties but proportionally over-represented in smaller coastal and commuter municipalities.

A caveat that applies to the whole chapter

Vehicles are registered at the owner's registered home address. For mopeds driven by young people under 18, a parent is often listed as the owner, which is unproblematic as long as the family lives in the same municipality.

The measure therefore shows where moped owners live, not where the mopeds are driven. For municipalities with a large share of holiday homes, for example in the archipelago, this can pull in either direction. Öckerö's and Tjörn's high values should be interpreted with this in mind.

8. Moped class II: growing market, incomplete statistics

Class II must be analysed separately. Swedish vehicle statistics cannot be used as a national sell-through series for the segment, but Svensk Försäkring's insurance statistics have, since 2021, provided a national volume series for the fleet.

Transportstyrelsen states that moped class II has a design speed of at most 25 km/h and a motor output of at most 1 kW. The vehicle is not required to be registered and carries no registration plate. [18]

Trafikanalys's quality declaration for the vehicle statistics clarifies that only moped class I is included among mopeds in the register-based statistics. The same delimitation is confirmed in the methodology section of the county and municipality statistics used in chapter 7. [17] [24]

What can be established	What cannot be established from the vehicle register
Rules, technical class and insurance requirements	Number of newly registered class II vehicles per year
That new electric class II products are being offered commercially	Fleet by municipality or county
Current price points for individual models	National electric share or fuel-type mix
Historical insurance-based trend for the older fleet	Market growth in new sales

Table 4. The delimitation follows from the registration requirement, not from poor statistical quality. [17] [18] [24]

History: the traditional class II market shrank sharply

Insurance data compiled by VTI shows that the number of traffic-insured class II mopeds fell from 113,792 in 2003 to 44,620 in 2010, a decline of about 61 percent. [23]

Year	Traffic-insured class II	Change vs. 2003
2003	113,792	baseline
2005	86,709	-23.8%
2007	67,044	-41.1%
2010	44,620	-60.8%

Table 5. Source: Svensk Försäkring insurance data compiled by VTI. The series ends in 2010 and is therefore sixteen years old. [23]

The series shows a clear structural decline for the older 25 and 30 km/h market. It should not, however, be mechanically extrapolated to today's class II: since 2016 the regulations have also covered a new type of electric, bicycle-like vehicle with pedals and a motor of up to 1 kW. [18]

That a sixteen-year-old series was for a long time the only quantification of the segment was itself a finding. An updated insurance-based series of this kind is presented below.

A new measurement: the class II fleet growing again (2021–2025)

Svensk Försäkring/Trafikförsäkringsföreningen's statistics tool TFSY reports traffic-insured moped class I and II separately for 2021–2025, measured twice a year (30 June and 31 December). [25] The source measures the insured fleet, not new registrations, sales or fuel type, and lacks a county or municipality breakdown — but for the first time since Table 5 it provides a combined national volume series for class II.

Year	30 June	31 December	Share of class I+II (31 Dec)
2021	57,167	54,058	37%
2022	51,349	42,018	32%
2023	45,194	51,282	37%
2024	64,738	63,310	43%
2025	69,058	67,759	45%

Table 5b. Traffic-insured moped class II and its share of the combined traffic-insured fleet of moped class I and II in TFSY, 30 June and 31 December, 2021–2025. Source: Svensk Försäkring, TFSY. [25]

The fleet is 25 percent larger than in 2021 and has grown strongly since the 2022 trough, with particularly strong development in 2023–2025: plus 32 percent 2023–2025 (31 December), or plus 53 percent measured 30 June (45,194 → 69,058). Class II's share of the combined traffic-insured fleet of moped class I and II in TFSY has thus risen from 37 to 45 percent in four years, while class I's share has shrunk correspondingly.

Class II emerges in this data as a significant and growing segment rather than a marginal niche: the traffic-insured fleet increased from 54,058 vehicles in 2021 to 67,759 in 2025, and by the end of the period accounted for 45 percent of the combined traffic-insured fleet of moped class I and II in TFSY. The underlying data, however, completely lacks a breakdown by fuel type, which means it is not possible to determine what role electrification plays in the development.

The series shows a clear level change around 2022–2023. The report has not been able to verify whether any change in reporting, coverage or classification occurred during the period, which should be taken into account when interpreting the growth rate.

The same source also reports class I, and there the picture differs from the register data used elsewhere in the report. TFSY shows an insured class I fleet (31 December) that is declining, from 90,803 (2021) to 83,389 (2025), minus 8 percent, whereas Transportstyrelsen's/Trafikanalys's register-based "in traffic" fleet in chapters 2–7 instead shows a slight increase over the same period. The levels also already differ in 2021, by around 13 percent, even though both comparisons use year-end data. Traffic insurance is essentially mandatory for vehicles in traffic, so the two measures ought to be close to each other. The difference suggests that the sources use different definitions, reporting universes or insurance status. The cause has not been established. TFSY is therefore used only for comparisons between class I and II within the same insurance source, not as a substitute for Trafikanalys's register series.

The source also provides a new seasonal observation. Class I has a large and consistent gap between the summer and winter measurement (between 25 and 32 percent more insured vehicles on 30 June than on 31 December, every year 2021–2025), in line with chapter 10's discussion of off-road status. Class II shows a substantially weaker and more irregular pattern (between minus 12 and plus 22 percent), which may suggest that class II vehicles are insured and used more evenly across the year than class I — the data is not sufficient, however, to establish why.

A concrete market example

The Vässla epa-1.1 is offered in a class II version with 25 km/h and 1,000 W. The Swedish product page lists a starting price of SEK 16,990, while the battery can be financed through a separate monthly plan. It is therefore a useful price point but not a volume-weighted average price. [21] [22]

A traffic rule that distinguishes class II from class I in cities

One specific functional feature distinguishes class II from class I in dense urban environments. Two-wheeled class II mopeds mainly follow the traffic rules for bicycles and should normally be ridden on cycle paths where available, unless the cycle path is signed with the supplementary "no moped" plate. [18] This can give class II a different transport utility than class I in cities with well-developed cycling infrastructure. However, the size of this advantage in actual travel time or demand is not quantified in this report.

Health diagnosis: growing, but still narrowly measured

The insurance data shows clear fleet growth, but lacks a breakdown by fuel type, geography and new sales. The report can therefore describe the segment's size and fleet development, but not what is driving the growth.

No price positioning relative to the e-bike and class I can be established: the available starting price refers to a configuration without a battery and is not comparable to complete vehicles in other categories.

9. Substitution: the A-traktor hypothesis tested against data

A common explanation for the moped's stagnation is that the A-traktor (light quadricycle) has taken over the youth market outside major cities. The hypothesis is plausible but has rarely been tested quantitatively. The county and municipality data makes it possible to test it, albeit indirectly.

In 2019 there were 25,404 registered A-traktors. By the end of 2024 the number was 59,346, and in June 2026 Transportstyrelsen reported that the fleet had grown further to nearly 68,000. [19] [20]

A-traktors are registered as tractors and are not reported separately in the municipality-level statistics. However, the total tractor fleet grew from 346,219 to 408,941 vehicles between 2019 and 2025, an increase of 62,722. The A-traktor fleet increased by around 34,000 over an almost identical period, i.e. roughly 54 percent of the growth. The change in tractor fleet by municipality is used below as a proxy, but it should be noted here already that the remaining 46 percent is other tractor growth and that the periods are not fully identical.



Figure 7. Change in tractor fleet versus change in moped fleet per 1,000 inhabitants, municipality level, 2019–2025.

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2019 and 2025*, tables 1 and 3. Municipalities with at least 5,000 inhabitants. [24]

The result: a figure that does not settle the question

The correlation between the change in tractor density and the change in moped density is minus 0.23 across 273 municipalities. The relationship has the direction the hypothesis predicts but is weak. How much of that weakness is due to reality and how much is due to the proxy cannot be determined, as discussed below.

What the conclusion actually is

The hypothesis can neither be confirmed nor rejected with this data. Because a significant part of the tractor fleet's growth is due to something other than A-traktors, the independent variable contains a measurement error of unknown size, and measurement error of that kind pulls correlations toward zero. A weak relationship is therefore exactly what one would expect even if the substitution were in fact strong. The figure minus 0.23 thus does not distinguish between a weak relationship and a too-blunt instrument, and should not be read as evidence in either direction.

That the moped fleet is growing fastest in Norrbotten and Jämtland, where tractor density has increased the most, is difficult to reconcile with a simple substitution mechanism. The direction could also reflect that both vehicle types respond to the same underlying factors, such as settlement structure and distance to public transport.

A credible test requires that the A-tractor fleet be reported separately by municipality. Trafikanalys has the data in its register but does not publish it in this table. That is a concrete, low-hanging improvement to the statistics.

Regional density of A-traktors

Indicator	Stockholm County	Västernorrland County
A-traktors per 1,000 inhabitants, 2024	1.7	14.6
Tractors total per 1,000 inhabitants, 2025	8.5	75.0
Moped class I per 1,000 inhabitants, 2025	8.1	11.3
Change in moped fleet, 2020–2025	+8.0%	–4.8%

Table 6. A-tractor data from Trafikanalys via the Riksdag Transport Committee; other rows own processing of Fordon i län och kommuner. [20] [24]

The contrast between the two counties is consistent with the substitution hypothesis, but two counties cannot establish a national pattern, and Norrbotten points in the opposite direction. The pair is presented as an illustration, not as a test.

The e-scooter shows the reverse geographic logic

E-scooter accidents mainly occur in urban environments and on municipal streets, but the increase is now also visible in smaller towns without rental schemes. This suggests that private ownership is broadening beyond the largest sharing-service markets. [8]

Price-based substitution between formats — a consumer being able to choose between, for example, an e-bike, an electric moped class II or certain class I mopeds within the same budget range — is a plausible hypothesis, but cannot be established quantitatively: there is neither a public market-share series by brand nor a public price distribution by category. Trafikanalys's interviews

with retailers do, however, point to increased competition and price pressure from international e-commerce within e-scooters, with an expectation of continued slow, stable growth. [5] The hypothesis is thus plausible and a possible partial explanation for the moped's plateau, but unestablished with the data currently available.

10. Season: the measurement point determines how big the market looks

The fact that the fleet is measured on 31 December has consequences that vary systematically across the country.

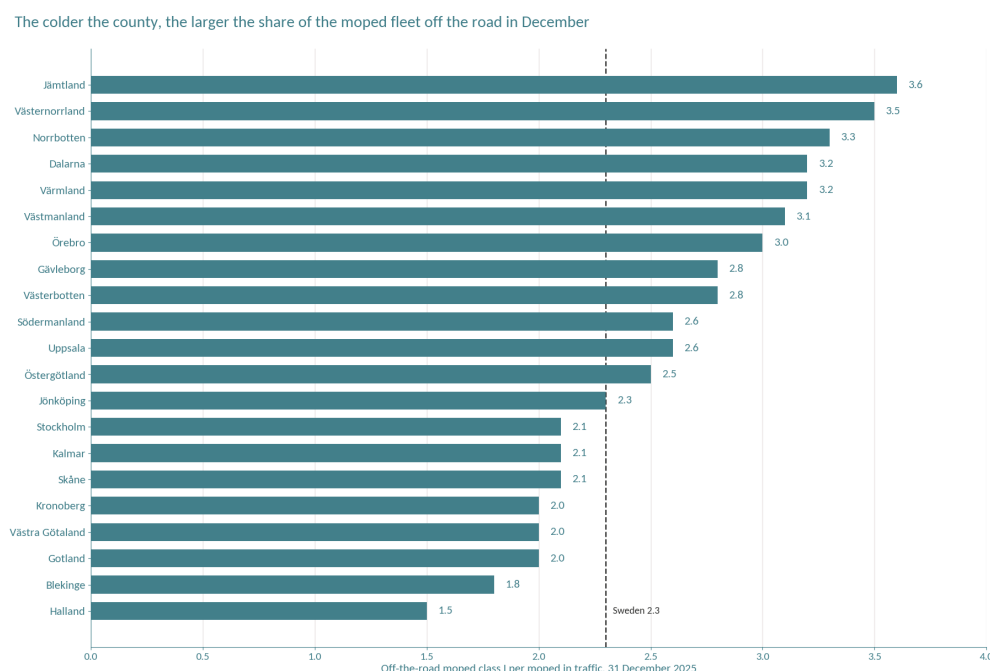


Figure 8. Off-the-road moped class I per moped in traffic, by county, 31 December 2025.

Source: own processing of Trafikanalys, *Fordon i län och kommuner 2025*, tables 1 and 2. [24]

In Halland there are 1.5 off-the-road mopeds for every moped in traffic. In Jämtland the ratio is 3.6. The gradient largely follows climate: milder coastal counties at the bottom, inland and Norrland counties at the top.

This means the official fleet figure understates the actual moped population the most in the counties where winter is longest. A comparison of “fleet in traffic” between Halland and Jämtland therefore partly compares two different things.

Fuel type does not follow the same pattern as county and climate. Nationally, the electric share is more than twice as high among mopeds in traffic (14.5 percent) as among those off the road (5.6 percent) — electric mopeds are thus less seasonally prone to being taken off the road than combustion mopeds, likely because they are on average newer vehicles. The winter observation therefore understates the total fleet generally, but it does not understate the electric share specifically; if anything, the measurement point overstates it, since more of the older, non-electrified vehicles are off the road at year-end.

Practical recommendation

For market sizing, the fleet in traffic is sensitive to the measurement point, while the total registered fleet is not. Insensitivity, however, is not the same as accuracy: the total figure, nearly 352,000 vehicles, assumes that deregistration keeps pace with scrapping. The national vehicle population therefore lies somewhere between 106,170 and 352,000, and the two figures should be used as a lower and upper bound respectively until the age distribution in the register has been analysed.

To assess actual usage, a summer measurement or a rolling monthly average should be used instead. Trafikanalys publishes monthly statistics that would make this possible.

11. Market value: the e-bike is a documented billion-krona market

Unit volume and krona value must be kept separate. Where volume is known, transparent scenarios are shown instead of a falsely precise average price.

For the e-bike there is a national unit series: 94,000 sold during the 2025 cycling year. A public volume-weighted average price is, however, lacking. A range can therefore illustrate the economic order of magnitude without pretending to be observed revenue. [4]

Assumed consumer price	E-bikes sold 2025	Indicated retail value incl. VAT
SEK 12,000	94,000	SEK 1.13 billion
SEK 16,000	94,000	SEK 1.50 billion
SEK 20,000	94,000	SEK 1.88 billion
SEK 25,000	94,000	SEK 2.35 billion
SEK 30,000	94,000	SEK 2.82 billion
SEK 35,000	94,000	SEK 3.29 billion

Table 8. Scenario: observed volume multiplied by assumed average price. Not reported industry revenue. [4]

Why the range is wide at the lower end

A scenario range anchored solely in premium products, for example SEK 20,000–35,000, does not account for the fact that budget retail and international e-commerce also exist, at prices that can be below SEK 15,000. Since no volume distribution across price levels is available, no central scenario is given within the range.

With the wider range, the 2025 e-bike volume corresponds to between SEK 1.1 and 3.3 billion at the consumer level including VAT. The corresponding value at the wholesale level, excluding VAT and trade margin, is substantially lower. Which level is meant should always be stated when such figures are cited.

Why no market value is given for e-scooter and class II

For privately owned e-scooters and moped class II, a complete national sell-through series is lacking. Multiplying price levels by guessed unit volumes would create more precision on paper than

in reality. The data gap is therefore a key finding: these markets may be commercially significant without their annual Swedish revenue being publicly verifiable.

Class I

For class I, register data is robust. The fleet of about 352,000 registered vehicles, of which 106,170 are in traffic, provides a reliable base for aftermarket, insurance and service. For new-sales value, a full year 2026 and a product-mix and price series should be used before a commercial market value is published.

Economic health

The safest conclusion in kronor is that the e-bike alone is a billion-krona market, even at the lowest assumed average price. For the other segments there are individual price examples but no volume-weighted average, and the national volume base is either incomplete or sensitive to registration effects.

For class I, the aftermarket is better underpinned by register data than new sales, but the base must be chosen carefully. The mandatory traffic insurance follows vehicles in traffic, and a vehicle that has been off the road for several years generates no workshop revenue. 106,170 should be regarded as a conservative point-in-time base; a commercial aftermarket estimate should preferably use a seasonally adjusted active fleet.

12. Swedish micromobility 2026: the health picture in six dimensions

Dimension	E-bike	E-scooter	Moped class I	Moped class II
Demand and usage	Strong and stable	Growing	Fossil-fuelled: stable, mature usage. Electric: rapidly increasing share of the active fleet.	Insured fleet 25% larger than in 2021, growing since the 2022 trough; actual usage not measured
New sales	94,000, -5% 2025	Not measured nationally	Fossil-fuelled and electric are not reported separately in new-registration statistics; the 2026 rebound refers to class I overall.	Not measured nationally
Fleet/penetration	33% of new bicycle sales	Geographic spread increasing	Electric in traffic: 15,415 (+773% since 2015, now 14.5% of the fleet). Fossil-fuelled in traffic: 90,755, down from the 2020 peak of 94,200 — all net growth since 2020 is electric.	Insurance-based: 54,058 → 67,759 (+25%, not monotonic) 2021–2025; 45% of the combined traffic-insured fleet of moped class I and II in TFSY in 2025. Not register-based.

Dimension	E-bike	E-scooter	Moped class I	Moped class II
Geography	Not broken down by municipality	Metropolitan-dominated, broadening	Extremely uneven overall (factor of 15). The electric share is even more concentrated, in Stockholm County.	Not register-based
Price and competition	Mature competition, price distribution not measured	Strong price pressure, price distribution not measured	No segment-specific price data; substitution toward other formats is an unestablished hypothesis.	Individual price example, excl. battery
Safety and regulation	Relatively stable regulatory environment	Growing injury burden, review underway	Established licensing (AM) and registration system, shared for electric and fossil-fuelled.	Established class regulatory framework
Data reliability	High	Medium for usage, low for sales	High, incl. fuel type and owner type	Medium for fleet, low for other measures

Table 9. Summary of the report's chapters 4 to 11.

Overall assessment

Swedish micromobility is healthy in the sense that large groups continue to choose small electric vehicles and several categories have stable or rising usage. It is polarised because growth is not even: the e-bike has become established and the e-scooter is growing in use. Moped class I is not one maturity plateau but two opposing movements: a fossil-fuelled fleet in slight decline since 2020, and an electric fleet that continues to grow rapidly from a small base.

The weakest system indicator is safety. Injuries from e-scooters have grown so fast that they are now a central part of the trend for injured unprotected road users, even though the risk per trip is not known. The weakest data components are class II, private e-scooter sales, and exposure measures for accident statistics.

A recurring insight in this report is that the national level is the wrong unit of analysis for the moped. The market is so geographically uneven that a national-average description misses most of what is relevant for decision-making.

Short answer

Swedish micromobility is not in general structural decline. It is a redistributed market. Health is good in the e-bike, expansive but under safety pressure in the e-scooter, mature and plateaued in moped class I, and in class II, which for the first time since 2010 has a quantified volume trend: 25 percent larger than in 2021 after strong growth since the 2022 trough, but still narrowly measured.

For the moped, it also holds that the national figure hides twelve growing and eight shrinking counties, and municipality differences of up to fifteen times.

13. Outlook 2026–2028

The base case is continued high demand for electric individual mobility, but without a common growth curve for all vehicle formats.

Segment	Base case 2026–2028	Upside drivers	Downside risk
E-bike	Continued high plateau rather than volume growth	High category share, commuting, established product range	Weak total bicycle market, price pressure, second-hand trade
E-scooter	Continued broad private usage is likely	Low entry cost, simplicity, geographic spread	Regulatory review, product classification, municipal caps
Moped class I	Continued national plateau with continued regional divergence	Stable fleet, rapidly increasing electric share (14.5% in traffic in 2025, up from 2.3% in 2015), strong aftermarket	Continued decline in parts of the country, competition from e-bike and class II
Moped class II	The fleet is 25 percent larger than in 2021 and has grown strongly since the 2022 trough, and at the end of 2025 accounted for 45 percent of the combined traffic-insured fleet of moped class I and II in TFSY; price positioning, fuel-type mix and new sales still lack national data	25 km/h format, new commercial products, low licensing friction	Remaining data gap at county and fuel-type level, competition from e-bike and e-scooter

What would change the diagnosis?

- A full year 2026 in which moped class I retains spring's year-on-year growth would move the segment from maturity plateau toward renewed growth. Spring's slowing rate argues against this.
- If the eight shrinking counties continue to decline at the same rate through 2028, the national fleet would start to fall despite growth in the north. This is the most likely path to an actual decline.
- A continued rapid increase in serious e-scooter accidents, or tighter regulation, would worsen the segment's overall health despite continued usage growth.
- Two consecutive cycling years clearly below the observed post-2018 plateau would be a first strong sign of a structural break downward.
- National sell-through data for private e-scooters and class II would change the assessment of market value more than any additional price point.
- If the electric moped fleet's annual growth rate continues to slow at the same pace as 2023–2025 (from around 7 to around 4 percent per year), the electric segment too will approach a plateau within a few years. That would suggest that the whole of moped class I, including electrification, is heading toward a new, higher equilibrium rather than an open-ended growth path.

The secondary market

Second-hand trade can keep usage high even as new sales fall, especially for more expensive e-bikes and premium electric mopeds. For mopeds, the register data is difficult to interpret on this point. A registered fleet of 352,000 vehicles against new registrations on the order of a few thousand per year corresponds to a turnover period of several decades, at the low end of the range over a hundred years. That ratio is not in itself evidence of a lively secondary market; it is equally consistent with worn-out vehicles remaining in the register without being deregistered, which is the open question from chapter 6. No consistent public series for second-hand volumes exists, and the secondary market is therefore treated as an explanatory mechanism and a data gap.

14. Conclusion: the market is being redistributed between formats and between places

What matters strategically is not whether micromobility is growing or falling in a single figure, but where the trips, the consumer kronor and the regulatory burden are moving.

Main conclusion

Sweden has an active micromobility market that is healthy in several respects. The e-bike has become a structurally established billion-krona category. The e-scooter continues to spread and be used but has a rapidly growing injury burden. Moped class I is in practice two segments moving in opposite directions: a mature, fossil-fuelled fleet that peaked in 2020 and has since declined 3.7 percent, and a small but rapidly growing electric fleet (+773 percent since 2015) that since 2020 alone accounts for the net growth in the fleet. The fossil-fuelled sub-segment, not the category as a whole, is the part of the market that should concern actors with exposure to combustion-engine vehicles. Class II is a significant and growing segment: insurance data shows that the traffic-insured fleet has grown strongly since the 2022 trough and, at the end of 2025, accounted for 45 percent of the combined traffic-insured fleet of moped class I and II in TFSY. What is driving that growth cannot be established with the available data, since a breakdown by fuel type, geography and new sales is lacking.

The most underappreciated conclusion is geographic. The moped market differs by up to fifteen times between municipalities, and twelve counties are growing while eight are shrinking. National averages are the wrong tool for this segment.

The geographic picture and electrification coincide: Stockholm County has both one of the country's lowest moped densities, the highest growth since 2015, and by far the highest electric share in the country. The electrification of moped class I is nationwide but clearly strongest in Stockholm County, where the electric share is close to 25 percent.

The most likely structural pattern

Demand for individual, electric mobility persists. The consumer can, however, meet the same short and medium trip with more vehicle options than before. A premium e-bike, a class II moped, an e-scooter and a class I moped occupy partly overlapping use cases, and likely also overlapping price ranges, although the price overlap is not quantified here.

On top of this lies a spatial logic that this report has been able to quantify for the first time: the geographic pattern is consistent with the hypothesis that the moped is stronger where access to private storage and parking is greater and where distance to public transport makes other individual modes of transport more attractive, and weaker in dense urban centres and multi-family-housing-dense suburbs. The report, however, lacks the data to establish these causes. The A-traktor is a plausible part of the picture outside the major cities, but the data cannot establish its significance.

Electrification adds a further layer to the spatial logic. It is unevenly distributed in a way that does not follow the volume pattern: Stockholm County, already atypical for its low density and high growth, also stands out clearly with an electric share close to 25 percent. Whether that pattern spreads to other growth counties — or remains a Stockholm-specific phenomenon — is an open question that next year's data should be able to answer.

Implications by actor

Actor	What the report means
Manufacturers and importers	National volume forecasts for class I are inadequate. Plan by county: northern growth, shrinking Bergslagen and inland Götaland, and an electrification that is today strongly concentrated in Stockholm County.
Retailers	The fleet of 352,000 registered vehicles makes the aftermarket more stable than new sales. Location analysis should be based on municipal density, not population. Stockholm today gives the clearest geographic market signal for an electric-powered range, with both the highest electric share and high electric-moped density.
Investors	The e-bike is the only category with verifiable national volume. No volume-weighted average price is published for any category, which is why market values should be stated as ranges. The other segments require their own data collection before valuation. Within moped class I, the electric moped fleet's growth rate (773 percent in traffic 2015–2025, versus 40 percent for the total fleet) is the single clearest growth indicator in the entire report, albeit from a small base.
Municipalities and regions	Moped density varies sevenfold within Stockholm County. Traffic-safety and infrastructure planning should be based on local data.
Government agencies	Three gaps are addressable at low cost: report A-traktors separately by municipality, publish exposure measures for e-scooter accidents, and break down the recently updated insurance series for class II by county and fuel type.

Five indicators to watch next

Indicator	Why it matters	Next clear data point
Moped class I, full year 2026	Shows whether spring's rebound is sustained or just a base effect	Trafikanalys full-year statistics 2026
Regional divergence in the moped fleet	Determines whether the national plateau holds or turns downward	Fordon i län och kommuner 2026
E-scooter, injuries and regulatory review	Safety is the segment's binding systemic risk	Transportstyrelsen's regulatory work and Strada 2026
The electric share of the moped fleet	Determines whether Stockholm's electrification pattern spreads to more counties or remains a metropolitan phenomenon	Fordon i län och kommuner 2026, breakdown by fuel type

Indicator	Why it matters	Next clear data point
Class II fleet growth 2026	Determines whether the 2023–2025 acceleration (+32% over two years) persists or was temporary	Svensk Försäkring/TFSY, updated statistics 2026

Scope of the report

Micromobility is used here as a practical market definition: e-bikes, e-scooters and mopeds class I and II that compete for short and medium individual trips. Moped class I is at the upper edge of common micromobility definitions but is included because, in the Swedish consumer market, it is a direct substitute for the other formats studied. Commercial e-scooter sharing services are treated as an identified gap and are not included in the quantitative analysis.

Sources

Sources are numbered in the text. Price figures are snapshots and may change after the report date.

[1] Statistics Sweden (SCB), “Hushållens konsumtion, juni 2026” (Household consumption, June 2026), published 12 August 2026.[Link](#)

[2] Statistics Sweden (SCB), “Detaljhandelns försäljning, juni 2026” (Retail sales, June 2026).[Link](#)

[3] Konjunkturinstitutet (National Institute of Economic Research), “Barometerindikatorn nu starkare än normalt” (The Economic Tendency Indicator now stronger than normal), 30 July 2026.[Link](#)

[4] 2030-sekretariatet and Miljöbarometern, “Antal sålda cyklar och elcyklar” (Number of bicycles and e-bikes sold). Underlying data: Cykelbranschen and Svensk Cykling.[Link](#)

[5] Trafikanalys, Report 2024:7, “Användning, marknad och konsekvenser av elsparkcyklar och andra eldrivna enpersonsfordon” (Usage, market and consequences of e-scooters and other electric single-person vehicles).[Link](#)

[6] Trafikanalys, “Kartläggning av elsparkcyklar” (Mapping of e-scooters).[Link](#)

[7] Trafikanalys, “Trafikolyckor med elsparkcyklar, en djupdykning i Strada” (Traffic accidents involving e-scooters, a deep dive into Strada).[Link](#)

[8] Transportstyrelsen, “Kraftig ökning av antalet elsparkcykelolyckor” (Sharp increase in the number of e-scooter accidents), 4 June 2026.[Link](#)

[9] Transportstyrelsen, “Transportstyrelsen ser över elsparkcykelregler” (Transportstyrelsen reviews e-scooter rules), 27 July 2026.[Link](#)

[10] Transportstyrelsen, “Skolstarten är här, har du koll på vad ditt barn kör?” (School has started, do you know what your child is riding?), 20 August 2026.[Link](#)

[11] Trafikanalys, “Fordon 2025” (Vehicles 2025).[Link](#)

[12] Trafikanalys, “Fordon i län och kommuner 2025” (Vehicles by county and municipality 2025).[Link](#)

[13] Trafikanalys, monthly statistics March 2026, newly registered vehicles. The moped figures are in the underlying tables, not in the press release headline.[Link](#)

[14] Trafikanalys, monthly statistics April 2026, newly registered vehicles.[Link](#)

[15] Trafikanalys, monthly statistics May 2026, newly registered vehicles.[Link](#)

[16] SCB Statistical Database, vehicle statistics, note on the registration effect in December 2024.[Link](#)

[17] Trafikanalys, quality declaration for monthly vehicle statistics: only moped class I is included.[Link](#)

[18] Transportstyrelsen, “Moped klass II” (Moped class II).[Link](#)

- [19] Transportstyrelsen, “A-traktorer i Sundsvall och mopedbilar i Kungsbacka, hur ser det ut i resten av Sverige?” (A-traktors in Sundsvall and moped cars in Kungsbacka, what does the rest of Sweden look like?), 29 June 2026.[Link](#)
- [20] Sveriges riksdag, Transport Committee report 2024/25:TU14 “Trafiksäkerhet” (Traffic safety), tables with Trafikanalys A-traktor data and regional density.[Link](#)
- [21] Vässla, epa-1.1, Swedish product page and starting price.[Link](#)
- [22] Vässla, epa-1.1 technical specification, class I and II, speed and output.[Link](#)
- [23] VTI report 856, table with Svensk Försäkring data on traffic-insured moped class I and II. The series ends in 2010.[Link](#)
- [24] Trafikanalys, “Fordon i län och kommuner”, editions 2015 to 2025, table 1 (vehicles in traffic), table 2 (off-the-road vehicles) and the table of passenger cars per 1,000 inhabitants. Own processing: compilation of the moped fleet by county and municipality for all eleven editions, derivation of municipal population figures, and calculation of density, rates of change and correlations. The data covers fuel type (electric/other) and owner type (natural/legal person) by municipality and year, from the same register source.
- [25] Svensk Försäkring, TFSY (Trafikförsäkringsföreningen's statistics tool), “Bestånd” (Fleet) tab, moped class I and II, number of vehicles 30 June and 31 December 2021–2025. Not publicly linkable; extract provided by the report's client.

Data cutoff for regularly published sources: 28 August 2026. Supplementary insurance data from Svensk Försäkring/TFSY received in September 2026. All calculations not stated as published source values are derivations from the reported series and are rounded where indicated. The county and municipality analysis in chapters 7, 9 and 10 is entirely own processing of source 24.

THE | ELECTRICTM COMPANY

