

Electric Two-Wheeler Market in India - Industry Outlook and Forecast 2020-2025

<https://marketpublishers.com/r/EA2DFCED5B7CEN.html>

Date: April 2020

Pages: 209

Price: US\$ 3,500.00 (Single User License)

ID: EA2DFCED5B7CEN

Abstracts

With the Purchase of India Electric Two-wheeler Market Report,

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The electric two-wheeler market in India is expected to grow at a CAGR of over 44% during the period 2019–2025.

The electric two-wheeler market in India is emerging on account of increased government policies supporting battery-powered vehicles, the growing awareness toward the environment, increasing petrol prices, and stringent emission norms. The Government of India has taken several initiatives to boost the sale of electric vehicles (EV), including two-wheelers. In 2013, with the launch of the National Electric Mobility Mission Plan 2020, which aims to increase the adoption and manufacturing of EV in India (FAME India), around 90% of the vehicles that availed incentives, were battery-powered two-wheelers. Similarly, in the Union budget 2019, the government had framed several policies and announced rebates on battery-powered vehicles. Hence, the remission to customers on interest to buy battery-powered vehicles is expected to increase adoption and demand for battery-powered scooters and motorcycles.

Another important driver contributing to the growth and adoption of EV, especially scooters and motorcycles, is the growing awareness of greenhouse gas emissions and environmental pollutions. Electric vehicles have the potential to reduce dependence on crude oil. India is witnessing a rise in environmental consciousness, thereby driving government agencies to take initiatives to curb the practices that are increasing environmental risks. Therefore, the cost-effectiveness of EVs due to government incentives and long-term fuel savings along with environmental friendliness are key

factors increasing the purchase of electric vehicles in India.

The following factors are likely to contribute to the growth of the electric two-wheeler market in India during the forecast period:

Government-Industry Collaboration

Increase in Affordability

Increase in Government Initiatives

Growth in Environmental Awareness

The study considers the present scenario of the electric two-wheeler market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Electric two-wheeler Market in India: Segmentation

This research report includes detailed market segmentation by technology, battery, vehicle, voltage, speed, and geography. The removable battery segment is expected to grow at the highest CAGR during the forecast period. As electric scooters and motorcycles face the challenge of charging infrastructure, removable batteries have emerged as a solution in India. Removable batteries are more in demand than non-removable ones as they provide charging at home. They are expected to be a gamechanger. The change to detachable batteries will double the country's speed toward electrification. Swappable batteries are also a major idea, which is currently emerging among several electric two-wheeler companies.

Currently, several electric two-wheeler manufacturers utilize lead-acid batteries as they are easy to procure and cost-effective. However, lithium-ion batteries are also witnessing demand as they are better in terms of range, speed, and charging. Although the share of lead-acid batteries is expected to lead during the forecast period, lithium batteries are likely to grow significantly by volume. A high-speed lithium-ion battery-powered scooter or motorcycle costs two times than a low-speed lead-acid battery strapped version. Therefore, due to the low cost of manufacturing, manufacturers

continue to produce electric two-wheelers based on lead-acid batteries, thereby driving the segment growth. Although lead-acid batteries are expected to be phased out due to their low capacities and efficiencies, depths of discharge, and reduced low lifespans, lithium-ion batteries are the future of electric transportation. The availability of subsidies and increasing efficiencies in lithium-ion battery technology is expected to increase application.

With India's major automobile manufacturers entering battery-powered vehicles manufacturing, electric scooters and motorcycles are gradually becoming mainstream transportation. Backed by the "Make in India" initiative and the rise of indigenous start-ups, the government has targeted to be 90% electrical by 2025. The e-scooter and motorcycle market has grown significantly in the last three years on account of government subsidies and initiatives. Battery-powered scooters and motorcycles are spearheading the e-revolution in India. Although electric scooters and motorcycles make up a fraction of the total two wheelers currently, the demand is expected to pick during the forecast period. Scooters, as well as motorcycles, can be charged fast and easily via existing plug-in points at homes. By the year 2030, the sale of electric scooters is expected to exceed 2 million. However, after the launch of the FAME II scheme in April 2019, there was a sharp decline in the sale of electric scooters and motorcycles on account of low subsidy, which eventually increases the cost of electric scooters and motorcycles. Further, with decreasing air quality and rising traffic becoming the most worrying challenge in major Indian cities, e-scooters hold the potential to emerge as a safe and viable alternative.

The voltage of a battery is a major differentiator in EV as it impacts range, speed, mileage, price, and weight. 48V batteries experience high importance in the electric vehicle market as they are cost-effective and safe. These batteries are in demand from automotive, industrial, and communications industries. 48V batteries with suitable current capacity are the most reasonable combination in terms of range and safety. Hence, 48V voltage batteries are expected to have the majority share in the electric vehicle battery segment.

60V batteries are the second most preferred in the electric two-wheeler market. In terms of battery type charger, 60V Lithium-ion battery chargers are designed with ultra-high efficiency and complete metal case enclosures. The extraordinary performance of low-power dissipation provides high reliability and a super long service life, which is increasing their penetration. Moreover, manufacturers are shifting toward low to medium range (60V) electric vehicles due to stringency in emission norms. The shift of consumers toward low-cost and medium-range electric vehicles is expected to influence

the demand for 60 voltage batteries during the forecast period.

Electric two-wheelers have greatly penetrated the market. The high-speed two-wheeler segment receives support from the government in the form of subsidies. According to the new standards (FAME II), battery-powered scooters and motorcycles with a minimum range of 80 km and a top speed of 40 km/h are eligible for the subsidy, thereby boosting the segment. Hence, manufacturers are coming up with several types of high-speed electric scooters and motorcycles, which are expected to have a top speed range between 40 and 80 km/h. Thus, high-speed two wheelers are projected to be high demand during the forecast period.

Although low-speed electric two wheelers are not eligible for any incentive under the FAME II scheme, they have a high share on account of cost-efficiency. Nearly all low-speed batteries run on lead-acid batteries, making them feasible and less expensive. Therefore, it constitutes the majority of battery-powered vehicles. However, a low load carrying capacity and the use of lead-acid batteries are the major limiting factors for the adoption of low-speed battery-powered two-wheelers in India.

Market Segmentation by Technology

Removable

Non-removable

Market Segmentation by Battery

Lithium-ion

Lead Acid

Market Segmentation by Vehicle

Scooters

Motorcycles

Market Segmentation by Voltage

48V

60V

72V& Above

Market Segmentation by Speed

High

Low

Insights by Geography

The Indian automobile industry became the fourth largest producer in the world by manufacturing more than 30 million passenger and commercial vehicles in 2019. The Indian automobile market is among the top five markets with the highest FDI inflows. There is a huge scope in the automobile market in India with the growth in infrastructure, technology, and consumer demand. With the increase in population and automobiles in India, pollution levels are soaring. Hence, the introduction of electric two wheelers is the preferable solution in the country. India is recognized as one of the fastest-growing countries in terms of technology usage, literacy, disposable income, and provides a conducive business environment. These factors have been the major attraction for domestic and foreign investors to invest in the EV industry. With the government pushing toward electric two-wheelers to curb pollution and reduce dependence on fossil fuel, the adoption of EV is expected to increase.

Long-term investments in R&D are expected to generate robust growth during the forecast period. The electrification of the automotive industry aims at achieving the stated objectives by decarbonizing the transport system. Andhra Pradesh, Bihar, Delhi, Karnataka, Kerala, Maharashtra, Tamil Nadu, Telangana, Uttarakhand, and Uttar Pradesh are ten states and union territories that are leading the way in building production, infrastructure, and services to increase the momentum of electric vehicle usage in India.

Market Segmentation by Geography

India

Eastern

Bihar

Odisha

West Bengal

Assam

Others

Western

Gujrat

Maharashtra

Rajasthan

Madhya Pradesh

Others

Northern

Uttar Pradesh

Haryana

Delhi

Uttarakhand

Others

Southern

Karnataka

Tamil Nadu

Kerala

Telangana

Andhra Pradesh

Insights by Vendors

The Indian electric two-wheeler market is a highly competitive market with several regional and local players. A majority share of the market is captured by Hero Electric (Ather Energy), Ampere, Okinawa, and many others. To maintain a competitive edge in the market, the players are focusing on developing innovative products and increasing their product portfolio by making high R&D investments.

Although the established players dominate the market, growth opportunities for regional and local players also exist. The competitive intensity is higher in the Northern and Southern regions of India due to growing technology and infrastructure projects in the electric two-wheeler market. Northern and Southern India states majorly contribute to the electric vehicle segment. In contrast, few states such as Maharashtra and Gujrat in Western India also contribute higher than other states of India.

Vendors

Bajaj Auto

Okinawa

Menza Motors

Lohia

Ather Energy

Hero Electric

BattRe Electric Mobility

Avon Cycles

Ultraviolette

YoBykes

Avera

Crayon Motors

Techo Electra

Goreen e-mobility

M2GO

Evolet

Raftaar

Palatino

Komaki

SuperEco

Yukie

Ampere Vehicles

22 Kymco

Key Market Insights

The analysis of the electric two-wheeler market in India provides sizing and growth opportunities for the period 2020–2025.

Provides comprehensive insights on the latest industry trends, market forecast, and growth drivers in the market.

Includes a detailed analysis of market growth drivers, challenges, and investment opportunities.

Delivers a complete overview of market segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key market strategies to gain a competitive advantage in the market.

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.1.1 Inclusions

4.1.2 Exclusions

4.2 Base Year

4.3 Scope of The Study

4.4 Market Segments

4.4.1 Market Segmentation by Battery

4.4.2 Market Segmentation by Vehicle

4.4.3 Market Segmentation by Technology

4.4.4 Market Segmentation by Speed

4.4.5 Market Segmentation by Voltage

4.4.6 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.2 Currency Conversion

5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Overview

7.2 Scooters and Motorcycles

7.3 Electric Batteries

7.4 Key Insights

7.4.1 Market Developments

7.4.2 Battery Technology

- 7.4.3 Voltage Type
- 7.4.4 Speed Type
- 7.5 Fame I Scheme in India
- 7.6 Fame li Scheme in India
- 7.7 COVID-19 IMPACT

8 MARKET OPPORTUNITIES & TRENDS

- 8.1 Government-Industry Collaboration
- 8.2 Advances in Technology
- 8.3 Increased Affordability

9 MARKET GROWTH ENABLERS

- 9.1 Increase in Government Initiatives
- 9.2 Increase in Environmental Awareness

10 MARKET RESTRAINTS

- 10.1 Higher Acquisition Cost of Electric Two-Wheeler
- 10.2 Shortage of Charging Infrastructure
- 10.3 Consumer Acceptability of Electric Two-Wheeler

11 MARKET LANDSCAPE

- 11.1 Market Overview
- 11.2 Market Size & Forecast (Value)
- 11.3 Market Size & Forecast (Volume)
- 11.4 Five Forces Analysis
 - 11.4.1 Threat of New Entrants
 - 11.4.2 Bargaining Power of Suppliers
 - 11.4.3 Bargaining Power of Buyers
 - 11.4.4 Threat of Substitutes
 - 11.4.5 Competitive Rivalry

12 BATTERY SEGMENTATION

- 12.1 Market Snapshot & Growth Engine (Value)
- 12.2 Market Snapshot & Growth Engine (Volume)

12.3 Market Overview

12.4 Lead-Acid Batteries

12.4.1 Market Overview

12.4.2 Market Size & Forecast (Value)

12.4.3 Market Size & Forecast (Volume)

12.5 Lithium-Ion Batteries

12.5.1 Market Overview

12.5.2 Importing of Complete Battery Systems

12.5.3 Importing and Assembling

12.5.4 Market Size & Forecast (Value)

12.5.5 Market Size & Forecast (Volume)

13 VEHICLE SEGMENTATION

13.1 Market Snapshot & Growth Engine (Value)

13.2 Market Snapshot & Growth Engine (Volume)

13.3 Market Overview

13.4 Electric Scooter

13.4.1 Market Overview

13.4.2 Market Size & Forecast (Value)

13.4.3 Market Size & Forecast (Volume)

13.5 Electric Motorcycles

13.5.1 Market Overview

13.5.2 Market Size & Forecast (Value)

13.5.3 Market Size & Forecast (Volume)

14 TECHNOLOGY SEGMENTATION

14.1 Market Snapshot & Growth Engine (Volume)

14.2 Market Overview

14.3 Removable Battery

14.3.1 Market Overview

14.3.2 Market Size & Forecast (Volume)

14.4 Non-Removable Battery

14.4.1 Market Overview

14.4.2 Market Size & Forecast (Volume)

15 SPEED SEGMENTATION

15.1 Market Snapshot & Growth Engine (Volume)

15.2 Market Overview

15.3 Low Speed

15.3.1 Market Overview

15.3.2 Market Size & Forecast (Volume)

15.4 High Speed

15.4.1 Market Overview

15.4.2 Market Size & Forecast (Volume)

16 VOLTAGE SEGMENTATION

16.1 Market Snapshot & Growth Engine (Volume)

16.2 Market Overview

16.3 48V

16.3.1 Market Overview

16.3.2 Market Size & Forecast (Volume)

16.4 60V

16.4.1 Market Overview

16.4.2 Market Size & Forecast (Volume)

16.5 72V & ABOVE

16.5.1 Market Overview

16.5.2 Market Size & Forecast (Volume)

17 GEOGRAPHY

17.1 Market Snapshot & Growth Engine (Value)

17.2 Market Snapshot & Growth Engine (Volume)

17.3 Geographic Overview

18 NORTHERN INDIA

18.1 Market Overview

18.2 Market Size & Forecast (Value)

18.3 Market Size & Forecast (Volume)

18.4 Battery Type

18.4.1 Market Size & Forecast (Volume)

18.5 Vehicle Type

18.5.1 Market Size & Forecast (Volume)

18.6 Key States

- 18.6.1 Uttar Pradesh: Market Size & Forecast (Volume)
- 18.6.2 Haryana: Market Size & Forecast (Volume)
- 18.6.3 Delhi: Market Size & Forecast (Volume)
- 18.6.4 Uttarakhand: Market Size & Forecast (Volume)
- 18.6.5 Others: Market Size & Forecast (Volume)

19 WESTERN INDIA

- 19.1 Market Overview
- 19.2 Market Size & Forecast (Value)
- 19.3 Market Size & Forecast (Volume)
- 19.4 Battery Type
 - 19.4.1 Market Size & Forecast (Volume)
- 19.5 Vehicle Type
 - 19.5.1 Market Size & Forecast (Volume)
- 19.6 Key States
 - 19.6.1 Maharashtra: Market Size & Forecast (Volume)
 - 19.6.2 Gujarat: Market Size & Forecast (Volume)
 - 19.6.3 Rajasthan: Market Size & Forecast (Volume)
 - 19.6.4 Madhya Pradesh: Market Size & Forecast (Volume)
 - 19.6.5 Others: Market Size & Forecast (Volume)

20 SOUTHERN INDIA

- 20.1 Market Overview
- 20.2 Market Size & Forecast (Value)
- 20.3 Market Size & Forecast (Volume)
- 20.4 Battery Type
 - 20.4.1 Market Size & Forecast (Volume)
- 20.5 Vehicle Type
 - 20.5.1 Market Size & Forecast (Volume)
- 20.6 Key States
 - 20.6.1 Tamil Nadu: Market Size & Forecast (Volume)
 - 20.6.2 Andhra Pradesh: Market Size & Forecast (Volume)
 - 20.6.3 Kerala: Market Size & Forecast (Volume)
 - 20.6.4 Karnataka: Market Size & Forecast (Volume)
 - 20.6.5 Telangana: Market Size & Forecast (Volume)

21 EASTERN INDIA

21.1 Market Overview

21.2 Market Size & Forecast (Value)

21.3 Market Size & Forecast (Volume)

21.4 Battery Type

21.4.1 Market Size & Forecast (Volume)

21.5 Vehicle Type

21.5.1 Market Size & Forecast (Volume)

21.6 Key States

21.6.1 West Bengal: Market Size & Forecast (Volume)

21.6.2 Odisha: Market Size & Forecast (Volume)

21.6.3 Bihar: Market Size & Forecast (Volume)

21.6.4 Assam: Market Size & Forecast (Volume)

21.6.5 Others: Market Size & Forecast (Volume)

22 COMPETITIVE LANDSCAPE

22.1 Competition Overview

23 COMPANY PROFILES (WITH PRODUCTS IN THE MARKET)

23.1 Bajaj Auto

23.1.1 Business Overview

23.1.2 Product Offerings

23.1.3 Key Strategies

23.1.4 Key Strengths

23.1.5 Key Opportunities

23.2 OKINAWA

23.2.1 Business Overview

23.2.2 Major Product Offerings

23.2.3 Key Strengths

23.2.4 Key Strategies

23.2.5 Key Opportunities

23.3 Menza Motors

23.3.1 Business Overview

23.3.2 Major Product Offerings

23.3.3 Key Strengths

23.3.4 Key Strategies

23.3.5 Key Opportunities

- 23.4 Lohia
 - 23.4.1 Business Overview
 - 23.4.2 Major Product Offerings
 - 23.4.3 Key Strengths
 - 23.4.4 Key Opportunities
- 23.5 Ather Energy
 - 23.5.1 Business Overview
 - 23.5.2 Major Product Offerings
- 23.6 Hero Electric
 - 23.2.1 Business Overview
 - 23.2.2 Major Product Offerings
- 23.7 Battre Electric Mobility
 - 23.7.1 Business Overview
 - 23.7.2 Product Offerings
- 23.8 Avon Cycles
 - 23.8.1 Business Overview
 - 23.8.2 Major Product Offerings
- 23.9 Ultraviolette
 - 23.9.1 Business Overview
 - 23.9.2 Major Product Offerings
- 23.10 YOBYKES
 - 23.10.1 Business Overview
 - 23.10.2 Major Product Offerings
- 23.11 Avera
 - 23.11.1 Business Overview
 - 23.11.2 Major Product Offerings
- 23.12 Crayon Motors
 - 23.12.1 Business Overview
 - 23.12.2 Major Product Offerings
- 23.13 Techo Electra
 - 23.13.1 Business Overview
 - 23.13.2 Major Product Offerings
- 23.14 Goren E-Mobility
 - 23.14.1 Business Overview
 - 23.14.2 Major Product Offerings
- 23.15 M2GO
 - 23.15.1 Business Overview
 - 23.15.2 Major Product Offerings
- 23.16 Evolet

- 23.16.1 Business Overview
- 23.16.2 Major Product Offerings
- 23.17 Raftaar
 - 23.17.1 Business Overview
 - 23.17.2 Major Product Offerings
- 23.18 Palatino
 - 23.18.1 Business Overview
 - 23.18.2 Major Product Offerings
- 23.19 Komaki
 - 23.19.1 Business Overview
 - 23.19.2 Major Product Offerings
- 23.20 Supereco
 - 23.20.1 Business Overview
 - 23.20.2 Major Product Offerings
- 23.21 Yukie
 - 23.21.1 Business Overview
 - 23.21.2 Major Product Offerings
- 23.22 Ampere Vehicles
 - 23.22.1 Business Overview
 - 23.22.2 Major Product Offerings
- 23.23 22 Kymco
 - 23.23.1 Business Overview
 - 23.23.2 Major Product Offerings

24 COMPANY PROFILES (WITH PRODUCTS IN THE PIPELINE)

- 24.1 Yamaha Motors
 - 24.1.1 Business Overview
 - 24.1.2 Key News – Electric Two-Wheeler
- 24.2 Hero Motors
 - 24.2.1 Business Overview
 - 24.2.2 Key News – Electric Two-Wheelers
- 24.3 Mahindra And Mahindra
 - 24.3.1 Business Overview
 - 24.3.2 Key News – Electric Two-Wheeler
- 24.4 Tork Motors
 - 24.4.1 Business Overview
 - 24.4.2 Key News – Electric Two-Wheeler

25 REPORT SUMMARY

25.1 Key Takeaways

26 QUANTITATIVE SUMMARY

26.1 Battery

26.1.1 Market Size & Forecast (Value)

26.1.2 Market Size & Forecast (Volume)

26.2 Vehicle

26.2.1 Market Size & Forecast (Value)

26.2.2 Market Size & Forecast (Volume)

26.3 Speed

26.3.1 Market Size & Forecast (Volume)

26.4 Technology

26.4.1 Market Size & Forecast (Volume)

26.5 Voltage

26.5.1 Market Size & Forecast (Volume)

26.6 Geography

26.6.1 Market Size & Forecast (Value)

26.6.2 Market Size & Forecast (Volume)

26.7 Northern India

26.7.1 Battery: Market Size & Forecast (Volume)

26.7.2 Vehicle: Market Size & Forecast (Volume)

26.8 Western India

26.8.1 Battery: Market Size & Forecast (Volume)

26.8.2 Vehicle: Market Size & Forecast (Volume)

26.9 Southern India

26.9.1 Battery: Market Size & Forecast (Volume)

26.9.2 Vehicle: Market Size & Forecast (Volume)

26.10 Eastern India

26.10.1 Battery: Market Size & Forecast (Volume)

26.10.2 Vehicle: Market Size & Forecast (Volume)

27 APPENDIX

27.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Electric Two-Wheeler Market in India: Segmentation
- Exhibit 2 Market Size Calculation Approach 2019
- Exhibit 3 Pollution Data - November 2019
- Exhibit 4 Benefits of Electric Two-Wheelers
- Exhibit 5 Supply Chain Insights
- Exhibit 6 Impact of Government-Industry Collaboration
- Exhibit 7 Impact of Advances in Technology
- Exhibit 8 Impact of Increase in Affordability
- Exhibit 9 Impact of Increase in Government Initiatives
- Exhibit 10 Impact of Increase in Environmental Awareness
- Exhibit 11 Impact of Higher Acquisition Cost of Electric Two-wheeler
- Exhibit 12 Impact of Shortage of Charging Infrastructure
- Exhibit 13 Impact of Consumer Acceptability of Electric Two-Wheelers
- Exhibit 14 Electric Two-Wheeler Market in India 2019–2025 (\$ million)
- Exhibit 15 Electric Two-wheeler Market in India 2019–2025 (thousand units)
- Exhibit 16 Five Forces Analysis 2019
- Exhibit 17 Incremental Growth by Battery 2019 & 2025 (Value)
- Exhibit 18 Incremental Growth by Battery 2019 & 2025 (Volume)
- Exhibit 19 Electric Two-Wheeler Market in India by Lead-Acid Battery 2019–2025 (\$ million)
- Exhibit 20 Electric Two-Wheeler Market in India by Lead-acid Battery 2019–2025 (thousand units)
- Exhibit 21 Electric Two-Wheeler Market in India by Lithium-Ion Battery 2019–2025 (\$ million)
- Exhibit 22 Electric Two-Wheeler Market in India by Lithium-ion Battery 2019–2025 (thousand units)
- Exhibit 23 Incremental Growth by Vehicle 2019 & 2025 (Value)
- Exhibit 24 Incremental Growth by Vehicle Type 2019 & 2025 (Volume)
- Exhibit 25 Electric Scooters Market in India 2019–2025 (\$ million)
- Exhibit 26 Electric Scooters Market in India 2019–2025 (thousand units)
- Exhibit 27 Electric Motorcycles Market in India 2019–2025 (\$ million)
- Exhibit 28 Electric Motorcycles Market in India 2019–2025 (thousand units)
- Exhibit 29 Incremental Growth by Technology 2019 & 2025 (Volume)
- Exhibit 30 Electric Two-Wheeler Market in India by Removable Batteries 2019–2025 (thousand units)

- Exhibit 31 Electric Two-Wheeler Market in India by Non-Removable Batteries 2019–2025 (thousand units)
- Exhibit 32 Incremental Growth by Speed 2019 & 2025 (Volume)
- Exhibit 33 Low-Speed Electric Two-Wheeler Market in India 2019–2025 (thousand units)
- Exhibit 34 High-Speed Electric Two-Wheeler Market in India 2019–2025 (thousand units)
- Exhibit 35 Incremental Growth by Voltage Type 2019 & 2025 (Volume)
- Exhibit 36 48V Electric Two-wheelers
- Exhibit 37 Electric Two-Wheeler Market in India by 48V Battery 2019–2025 (thousand units)
- Exhibit 38 60V Electric Two-Wheeler
- Exhibit 39 Electric Two-Wheeler Market in India by 60V Battery 2019–2025 (thousand units)
- Exhibit 40 70V Electric Two-wheelers in India
- Exhibit 41 Electric Two-Wheelers in India - Voltage Capacity Above 72V
- Exhibit 42 Electric Two-Wheeler Market in India by 72V and Above Battery 2019–2025 (thousand units)
- Exhibit 43 Incremental Growth by Geography 2019 & 2025 (Value)
- Exhibit 44 Incremental Growth by Geography 2019 & 2025 (Volume)
- Exhibit 45 Electric Two-Wheeler Market in Northern India - Market Share and Growth Momentum (based on value)
- Exhibit 46 Electric Two-wheeler Market in Northern India 2019–2025 (\$ million)
- Exhibit 47 Electric Two-Wheeler Market in Northern India 2019–2025(thousand units)
- Exhibit 48 Incremental Growth in Northern India 2019 & 2025 (Volume)
- Exhibit 49 Electric Two-wheeler Market in Uttar Pradesh 2019–2025 (thousand units)
- Exhibit 50 Electric Two-Wheeler Market in Haryana 2019–2025 (thousand units)
- Exhibit 51 Electric Two-Wheeler Market in Delhi 2019–2025 (thousand units)
- Exhibit 52 Electric Two-Wheeler Market in Uttarakhand 2019–2025 (thousand units)
- Exhibit 53 Electric Two-Wheeler Market in Other States of Northern India 2019–2025 (thousand units)
- Exhibit 54 Electric Two-Wheeler Market in Western India - Market Share and Growth Momentum (based on value)
- Exhibit 55 Electric Two-wheeler Market in Western India 2019–2025 (\$ million)
- Exhibit 56 Electric Two-Wheeler Market in Western India 2019–2025 (thousand units)
- Exhibit 57 Incremental Growth in Western India 2019 & 2025 (thousand units)
- Exhibit 58 Electric Two-Wheeler Market in Maharashtra 2019–2025 (thousand units)
- Exhibit 59 Electric Two-Wheeler Market in Gujarat 2019–2025 (thousand units)
- Exhibit 60 Electric Two-Wheeler Market in Rajasthan 2019–2025(thousand units)

- Exhibit 61 Electric Two-Wheeler Market in Madhya Pradesh 2019–2025(thousand units)
- Exhibit 62 Electric Two-Wheeler Market in Other States of Western India 2019–2025 (thousand units)
- Exhibit 63 Electric Two-Wheeler Market in Southern India - Market Share and Growth Momentum (based on value)
- Exhibit 64 Electric Two-Wheeler Market in Southern India 2019–2025 (\$ million)
- Exhibit 65 Electric Two-Wheeler Market in Southern India 2019–2025 (thousand units)
- Exhibit 66 Incremental Growth in Southern India 2019 & 2025
- Exhibit 67 Electric Two-Wheeler Market in Tamil Nadu 2019?2025 (thousand units)
- Exhibit 68 Electric Two-Wheeler Market in Andhra Pradesh 2019?2025 (thousand units)
- Exhibit 69 Electric Two-Wheeler Market in Kerala 2019–2025 (thousand units)
- Exhibit 70 Electric Two-Wheeler Market in Karnataka 2019?2025 (thousand units)
- Exhibit 71 Electric Two-Wheeler Market in Telangana 2019?2025 (thousand units)
- Exhibit 72 Electric Two-Wheeler Market in Eastern India - Market Share and Growth Momentum (based on value)
- Exhibit 73 Electric Two-Wheeler Market in Eastern India 2019–2025 (\$ million)
- Exhibit 74 Electric Two-Wheeler Market in Eastern India 2019–2025(thousand units)
- Exhibit 75 Incremental Growth in Eastern India 2019 & 2025
- Exhibit 76 Electric Two-Wheeler Market in West Bengal 2019–2025 (thousand units)
- Exhibit 77 Electric Two-Wheeler Market in Odisha 2019?2025 (thousand units)
- Exhibit 78 Electric Two-Wheeler Market in Bihar 2019?2025 (thousand units)
- Exhibit 79 Electric Two-Wheeler Market in Assam 2019–2025 (thousand units)
- Exhibit 80 Electric Two-Wheeler Market in Other States of Eastern India 2019?2025 (thousand units)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2019

Table 3 Battery Type Comparison

Table 4 High-Speed Electric Two-Wheelers

Table 5 Cost Difference of 48V Battery

Table 6 Cost by Battery Type

Table 7 Electric Two-Wheeler Market in Northern India by Battery Type 2019?2025
(thousand units)

Table 8 Electric Two-Wheeler Market in Northern India by Vehicle Type 2019?2025
(thousand units)

Table 9 Electric Two-Wheeler Market in Western India by Battery Type 2019?2025
(thousand units)

Table 10 Electric Two-Wheeler Market in Western India by Vehicle Type 2019?2025
(thousand units)

Table 11 Electric Two-Wheeler Market in Southern India by Battery Type 2019?2025
(thousand units)

Table 12 Electric Two-Wheeler Market in Southern India by Vehicle Type 2019?2025
(thousand units)

Table 13 Electric Two-Wheeler Market in Eastern India by Battery Type 2019?2025
(thousand units)

Table 14 Electric Two-Wheeler Market in Eastern India by Vehicle Type 2019?2025
(thousand units)

Table 15 Bajaj Auto: Major Product Offerings

Table 16 Okinawa: Product Offerings

Table 17 Menza Motors: Product Offerings

Table 18 Lohia: Product Offerings

Table 19 Ather Energy: Product Offerings

Table 20 Hero Electric: Product Offerings

Table 21 BattRe Electric Mobility Major Product Offerings

Table 22 Avon Cycles: Product Offerings

Table 23 Ultraviolette: Product Offerings

Table 24 YoBykes: Product Offerings

Table 25 Avera: Product Offerings

Table 26 Crayon Motors: Product Offerings

Table 27 Techo Electra: Product Offerings

Table 28 Goren E-Mobility: Product Offerings

Table 29 M2GO: Product Offerings

Table 30 Evolet: Product Offerings

Table 31 Raftaar: Product Offerings

Table 32 Palatino: Product Offerings

Table 33 Komaki: Product Offerings

Table 34 SuperEco: Product Offerings

Table 35 Yukie: Product Offerings

Table 36 Ampere Vehicles: Product Offerings

Table 37 22 Kymco: Product Offerings

Table 38 Electric Two-Wheeler Market in India by Battery Type 2019?2025 (\$ million)

Table 39 Electric Two-wheeler Market in India by Battery Type 2019?2025 (Revenue %)

Table 40 Electric Two-wheeler Market in India by Battery Type 2019?2025 (thousand units)

Table 41 Electric Two-Wheeler Market in India by Battery Type 2019?2025 (Volume %)

Table 42 Electric Two-Wheeler Market in India by Vehicle Type 2019?2025 (\$ million)

Table 43 Electric Two-Wheeler Market in India by Vehicle Type 2019?2025 (Revenue %)

Table 44 Electric Two-Wheeler Market in India by Vehicle Type 2019?2025 (thousand units)

Table 45 Electric Two-Wheeler Market in India by Vehicle Type 2019?2025 (Volume %)

Table 46 Electric Two-Wheeler Market in India by Speed Type 2019?2025 (thousand units)

Table 47 Electric Two-Wheeler Market in India by Speed Type 2019?2025 (Volume %)

Table 48 Electric Two-Wheeler Market in India by Technology Type 2019?2025 (thousand units)

Table 49 Electric Two-Wheeler Market in India by Technology Type 2019?2025 (Volume %)

Table 50 Electric Two-Wheeler Market in India by Voltage Type 2019?2025 (thousand units)

Table 51 Electric Two-Wheeler Market in India by Voltage Type 2019?2025 (Volume %)

Table 52 Electric Two-Wheeler Market in India by Geography 2019?2025 (\$ million)

Table 53 Electric Two-Wheeler Market in India by Geography 2019?2025 (Revenue %)

Table 54 Electric Two-Wheeler Market in India by Geography 2019?2025 (thousand units)

Table 55 Electric Two-Wheeler Market in India by Geography 2019?2025 (Volume %)

Table 56 Electric Two-Wheeler Market in Northern India by Battery Type 2019?2025 (thousand units)

Table 57 Electric Two-Wheeler Market in Northern India by Vehicle Type 2019?2025

(thousand units)

Table 58 Electric Two-Wheeler Market in Western India by Battery Type 2019?2025

(thousand units)

Table 59 Electric Two-Wheeler Market in Western India by Vehicle Type 2019?2025

(thousand units)

Table 60 Electric Two-Wheeler Market in Southern India by Battery Type 2019?2025

(thousand units)

Table 61 Electric Two-Wheeler Market in Southern India by Vehicle Type 2019?2025

(thousand units)

Table 62 Electric Two-Wheeler Market in Eastern India by Battery Type 2019?2025

(thousand units)

Table 63 Electric Two-Wheeler Market in Eastern India by Vehicle Type 2019?2025

(thousand units)

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