

Europe Electric Two-wheeler Market - Industry Outlook & Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Europe Electric Two-wheeler Market Report

The Europe electric two-wheeler market is expected to grow at a CAGR of 13.12% during the forecast period 2021-2026.

With the increasing concern of over-utilizing of natural resources, electric vehicles are gaining traction in the automobile industry. The European government is working to make the transportation sector entirely electric by 2030. Due to the increasing efforts to reduce carbon emission, the government is expected to push the adoption for EV in Europe. Electric high-powered motorcycles are increasingly being adopted and are expected to be in trend during the forecast period. The high-powered electric motorcycle offers more than 30kW power and is similar in aesthetics to ICE motorcycles. The growth in production and marketing of such products is expected to create demand in the European market.

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

Rising Demand for E-Scooter Sharing Services

Introduction of Government Regulations on ICE Vehicles

Development of Charging Infrastructure

Increasing Investments in The E2w Market

The report considers the present scenario of the Europe electric two-wheeler market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes leading companies and several other prominent companies operating in the market.

EUROPE ELECTRIC TWO-WHEELER MARKET SEGMENTATION

The Europe electric two-wheeler market research report includes a detailed segmentation by product type, voltage, power, battery type, battery technology, battery current, geography. Nickel metal hybrid batteries and lithium-ion batteries are majorly used in the Europe electric bike market, and the segment holds over 60% share. The sales of e-bikes have increased rapidly in Europe as Europeans have higher WTP (willingness to pay) for e-bikes and other electric two-wheelers that offer both higher quality and performance. There are many players in the electric scooter market from Japan, South Korea, and Europe which are gaining high share and expanding in the European market. With the increasing support of government and local associations, a greater number of incentives in the e-motorcycles market are expected to increase the demand for electric motorcycles in Europe.

The 48V batteries are important for EVs as they are low in costs and are safe for consumers to use. The 48V voltage level is expected to have the majority share in the electric vehicle market battery segment as they are the most common type of voltage provided in an electric two-wheeler. To increase the performance of an electric two-wheeler, a large number of cells are incorporated to give better performance with respect to voltage.

The power of a battery is a major differentiator in an electric two-wheeler as it directly impacts the scooter range, speed, mileage, and price. In 2020, the less than 5kW segment led the market, accounting for 76.28% and 77.40% share in terms of value and volume, respectively, as there is a larger number of vehicles with less than 5kW power which is manufactured and used across Europe. The incorporation of power in electric vehicles are pushing the vendors to increase investment in R&D.

Vendors such as Askoll, Pierer Mobility, and others use lithium-ion batteries at a larger rate. Nickel metal hybrid is mostly used and requires replacement from time to time. The application of lithium batteries is the future of electric transportation in Europe. With the

implementation of new rules regarding subsidies and policies, changes in electric two-wheelers are expected in terms of batteries used in vehicles. In the coming years, the lithium-ion battery will play increasingly important roles in the area of power tools.

The introduction of detachable batteries has improved the convenience for consumers as they can be charged anywhere. Detachable or removable battery packs are expected to increase in demand among early EV consumers and adopters. The removable battery is gaining high momentum compared to non-removable batteries in the Europe electric two-wheeler market. Owing to the reduced charging time, removable batteries are more preferred by consumers.

The most common battery current type is less than 25Ah as more than 25Ah current requires more powerful batteries which tends to increase the weight of the vehicle and the overall cost of the vehicle. The battery current is critical in nature and currently, fewer battery current capacities are being manufactured in the initial stage of the market, as the market is at a nascent stage in Europe.

Segmented by Product Type

E-bike

E-Scooter

E-Motorcycle

Segmented by Voltage

48 V

60V

72 V & Above

Segmented by Power

15KW

Segmented by Battery Type

Lithium-Ion Battery

Nickel Metal Hybrid

Lead Acid Batteries

Segmented by Battery Technology

Removable Battery

Non- Removable Battery

Segmented by Battery Current

>25Ah Battery

INSIGHTS BY GEOGRAPHY

The e-bike market to generate higher revenue in Germany during the forecast period. Germany has the potential to become one of the key countries for eclectic mobility globally and in Europe due to higher technological advancements and consumer mindset and awareness. In Germany, technological companies are aggressively pushing the European electric vehicle companies to create maximum awareness and penetration rate. As all age groups demand e-bikes, there is huge scope for growth in the German market.

Segmented by Geography

Germany

Netherlands

Belgium

Italy

France

Spain

UK

RoE

COMPETITIVE LANDSCAPE

The growth in GDP, government restrictions, and import inflows are contributing to the Europe electric two-wheeler market expansion. Vendors are competing on various parameters, such as brand, product portfolio, product features, two-wheeler power consumption, and the efficiency of the products developed to sustain the European electric scooter market.

Key Vendors:

Askoll

BMW

Piaggio

Energica

PIERER MOBILITY

Other Prominent Vendors

Benelli

Ducati Motor

Ecoride

Electric Life Store

Emco

ETRIX

Gazelle

GOVECS

GEOBIKE

HORWIN

Johammer

KOGA

Silence

Sparta

Unu

Wayel

Zero Motorcycles

KEY QUESTIONS ANSWERED:

1. How big is the Europe electric two-wheeler market?
2. What percentage of vehicle sales are electric in the European region?
3. What is the market share of electric bikes in the country?
4. Which government regulations are enabling the electric vehicle market growth in the region?
5. Who are the key players in the Europe EV market?

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