

# Global Electric Bicycle Market Size Study & Forecast, by Drive (Belt Drive, Chain Drive) by Battery (Lithium-ion Battery, Lead-acid Battery) and Regional Forecasts 2025-2035

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## Abstracts

The Global Electric Bicycle Market is valued at approximately USD 61.89 billion in 2024 and is projected to expand at a robust CAGR of 10.3% throughout the forecast period of 2025–2035, with Historical Data spanning 2023 and 2024 and the Base Year for Estimation anchored at 2024. Electric bicycles, which seamlessly integrate electric propulsion systems with conventional cycling mechanics, are rapidly redefining urban and suburban mobility. Designed to amplify pedaling power while reducing rider fatigue, e-bikes have emerged as a compelling alternative to internal combustion vehicles, particularly for short- to mid-range commutes. Their rising adoption is being powered by shifting consumer preferences toward sustainable transportation, escalating fuel costs, and an increasing emphasis on personal health and fitness.

Momentum within the market is being further carried forward as governments roll out favorable policies, incentives, and infrastructure investments aimed at decarbonizing transportation networks. Urban congestion, last-mile delivery challenges, and the push to lower carbon footprints are collectively accelerating the uptake of electric bicycles across both developed and emerging economies. Technological breakthroughs in battery energy density, lightweight frames, and smart connectivity features are also pushing manufacturers to roll out next-generation models that blend performance with convenience. However, despite strong tailwinds, the market continues to navigate challenges related to high upfront costs and regulatory inconsistencies across regions, which may temper growth in select geographies over the forecast timeline.

**The detailed segments and sub-segments included in the report are:**

By Drive:

Belt Drive

Chain Drive

By Battery:

Lead-acid Battery

Lithium-ion Battery

Others

By End Use:

Personal

Commercial

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

#### Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

#### Latin America

Brazil

Mexico

#### Middle East & Africa

UAE

Saudi Arabia

South Africa

## Rest of Middle East & Africa

The personal end-use segment is expected to dominate the Global Electric Bicycle Market over the forecast period, accounting for the largest share of total demand. This dominance is underpinned by the rapid penetration of e-bikes among daily commuters, recreational riders, and fitness-conscious consumers seeking cost-efficient and eco-friendly mobility solutions. As urban dwellers increasingly swap cars for e-bikes to navigate congested cityscapes, personal ownership continues to surge. Meanwhile, commercial applications—particularly in logistics, food delivery, and shared mobility platforms—are gaining traction and are poised to register accelerated growth as businesses scale up low-emission delivery fleets.

From a revenue perspective, lithium-ion battery-powered electric bicycles currently lead the market, commanding the largest share owing to their superior energy density, longer lifecycle, and faster charging capabilities. These batteries have become the backbone of modern e-bike design, enabling extended riding ranges and lighter overall vehicle weight. While lead-acid batteries still retain a foothold in cost-sensitive markets due to their lower initial pricing, their market presence is gradually being edged out as lithium-ion technologies become more affordable and widely accessible. The shift toward premium, high-performance e-bikes continues to reinforce lithium-ion batteries as the revenue-driving segment.

Regionally, Asia Pacific stands out as both the dominant and fastest-growing market, driven by high population density, strong manufacturing ecosystems, and widespread adoption of electric bicycles in countries such as China, Japan, and India. Europe follows closely, supported by stringent emission regulations, well-developed cycling infrastructure, and strong government incentives promoting electric mobility. North America is witnessing steady growth as urban commuting patterns evolve and consumers increasingly embrace e-bikes for leisure and last-mile transportation. Meanwhile, Latin America and the Middle East & Africa are gradually emerging as promising markets as urbanization accelerates and awareness of sustainable mobility solutions gains ground.

Major market players included in this report are:

Giant Manufacturing Co., Ltd.

Accell Group N.V.

Trek Bicycle Corporation

Yamaha Motor Co., Ltd.

Robert Bosch GmbH

Merida Industry Co., Ltd.

Specialized Bicycle Components, Inc.

Panasonic Corporation

Shimano Inc.

Pedego Electric Bikes

Riese & Müller GmbH

Hero Cycles Ltd.

AIMA Technology Group

Yadea Group Holdings Ltd.

Derby Cycle Holding GmbH

#### Global Electric Bicycle Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define the market size of various segments and countries in recent years and to project their values through 2035 by integrating both qualitative insights and quantitative analysis. By leveraging Historical Data from 2023 and 2024 and using 2024 as the Base Year for Estimation, the report evaluates how regulatory frameworks, consumer behavior shifts, and technological advancements will shape the future trajectory of the Global Electric Bicycle Market. It further highlights growth drivers, challenges, emerging opportunities, and a detailed assessment of competitive strategies and product portfolios adopted by key industry participants.

#### Key Takeaways:

Market estimates and forecasts for the period 2025–2035

Annualized revenue analysis at regional and segment levels

In-depth geographical assessment with country-level insights

Competitive landscape analysis featuring major market players

Strategic evaluation of business approaches and future growth pathways

Comprehensive demand-side and supply-side market analysis

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