

Asia Pacific Electric Scooter Market Size, Share & Trends Analysis Report By Battery Type (Lithium-ion, Lead-acid), By Drive Type (Belt Drive, Hub Motor), By End-use (Personal, Commercial), By Country, And Segment Forecasts, 2023 - 2030

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Abstracts

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Asia Pacific Electric Scooter Market Growth & Trends

The Asia Pacific electric scooter market size is expected to reach USD 61.38 billion by 2030, registering a CAGR of 11.9% over the forecast period, according to a Grand View Research, Inc study. The market growth is primarily attributed to the factors such as supportive government initiatives for OEMs and consumers, rising awareness regarding environmental concerns, and increasing availability of advanced electric scooter models in several Tier 2 & 3 cities in the region. In addition, growing technological advancements at the electric scooter component level and rising fuel prices enabling consumers to opt for electric vehicles over their counterparts are some of the key aspects anticipated to drive the market growth over the forecast period. Growth in several start-ups offering electric scooters is observed in the Asia Pacific region, which is poised to enable major players to reduce their prices, thereby enhancing the high sales of products in the region.

Manufacturers adopting battery-as-a-service and battery-swapping practices is another factor expected to facilitate the adoption of electric scooters in the Asia Pacific region. The battery swapping and battery-as-a-service models enable the riders to rent batteries at a lesser cost than purchasing a battery. In addition, battery swapping offers advantages such as extended range and reduced charging time. For commercial fleet

owners and last-mile delivery providers, battery swapping may prove to be a cost-effective solution. The fleet operators can reduce their downtime and increase vehicle utilization by exchanging depleted batteries instead of waiting for charging. Thus, resulting in increased productivity and reducing in cost.

High ownership cost is considered a major factor hindering the growth of the Asia Pacific market for electric scooters. Components such as electric scooter battery cells constitute of almost 30% of electric scooter cost, making up most of the vehicle cost. However, the accelerating adoption of electric scooters in the Asia Pacific region has compelled manufacturers to address the issue of high ownership cost by investing substantially in research and development efforts to improve the existing battery capacity or develop batteries with lower costs.

For instance, in July 2022, Ola Electric Mobility, an Indian electric two-wheeler manufacturer, announced an investment of USD 500 million in research and development for battery cell and battery innovation. The company has established Battery Innovation Centre (BIC) at Bengaluru in Karnataka, India, to develop localized and futuristic cell technology. The innovation center is well equipped with advanced resources used to develop battery pack design, fabrication process, and battery testing under one single roof. The center is also equipped with in-house capabilities to produce cathode and anode material, an integrated facility for crystal structure analysis, molecular dynamics simulation, and hand nanoscale analysis to develop new batteries opening new opportunity avenues for the battery segment. The in-house development and manufacturing of batteries by manufacturers can potentially reduce electric scooter costs by 30%, rendering electric scooters more affordable and accessible.

The Asia Pacific electric scooter industry is fragmented, with major market incumbents focused on establishing their foothold in the region by implementing initiatives such as product launches and products with enhanced features to engage target consumers and enhance market share. For instance, on July 2022, Ather Energy Private Limited, an Indian electric scooter manufacturer announced the launch of 450X Gen 3 for the Indian market. The scooter is equipped with a 3.7 kWh lithium-ion battery pack, 74 Ah capacity, with a range of 146 km. The vehicle is also equipped with features such as home charging and fast charging options LCD touchscreen display.

Asia Pacific Electric Scooter Market Report Highlights

The belt drive segment's growth is attributed to factors such as low maintenance, cost-effective, efficient power transmission, and lighter weight.

Belt-drive scooters offer efficient pickup and battery performance, protecting the vehicle from overloading and slipping

The lithium-ion battery segment's growth is attributed to lowering raw material prices, and government initiatives in terms of reducing custom duty on the import of raw materials required for manufacturing electric vehicle batteries. However, resources dedicated to developing new cell chemistries using solid electrolytes and different anode battery material are expected open new opportunity avenues for the lithium-ion battery

The growing traction toward rental mobility and last-mile delivery segment has opened new opportunity avenues for the commercial use of electric scooters. OEMs operating in the electric scooter landscape partner with delivery firms to leverage their scooters

India is expected to register the fastest growth over the forecast period. The market growth is ascribed to factors such as favorable government initiatives, growing concerns over greenhouse gas emissions, and rising development in charging infrastructure. The major market incumbents operating in the country are prioritizing launching new electric scooters to expand their businesses and strengthen their market positions

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