

E-Bike Market Report by Mode (Throttle, Pedal Assist), Motor Type (Hub Motor, Mid Drive, and Others), Battery Type (Lead Acid, Lithium Ion, Nickel-Metal Hydride (NiMH), and Others), Class (Class I, Class II, Class III), Design (Foldable, Non-Foldable), Application (Mountain/Trekking Bikes, City/Urban, Cargo, and Others), and Region 2024-2032

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Abstracts

The global e-bike market size reached US\$ 24.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 43.8 Billion by 2032, exhibiting a growth rate (CAGR) of 6.48% during 2024-2032. The rising environmental concerns, rapid urbanization, increasing health and fitness activities, favorable government initiatives, significant technological advancements, increasing awareness about environmental issues and changing lifestyle trends are some of the major factors propelling the market.

An e-bike, short for electric bicycle, is a two-wheeled vehicle equipped with an electric motor that assists the rider in pedaling. These innovative bicycles are designed to blend the convenience of motorized transportation with the health benefits and eco-friendliness of traditional cycling. E-Bikes come in various styles, including mountain bikes, city commuters, and folding bikes, catering to diverse user preferences and needs. The electric motor, powered by a rechargeable battery, provides varying levels of assistance to the rider, making it easier to navigate hills, cover long distances, or maintain a consistent speed. Riders can typically choose from different power settings to customize their riding experience.

Increasing awareness of environmental issues, such as air pollution and climate

change, has led consumers to seek eco-friendly alternatives. E-Bikes, emitting no pollutants and reducing the carbon footprint, are an attractive option for environmentally conscious individuals. Additionally, rapid urbanization has resulted in congested city streets and increased traffic. E-Bikes offer a convenient solution for urban commuting, allowing riders to navigate through traffic more efficiently and without the hassle of finding parking. Other than this, numerous individuals are looking to incorporate physical activity into their daily routines. E-Bikes provide a gentle form of exercise, encouraging people to stay active while commuting or for recreational purposes. Besides this, e-bikes are increasingly being used for last-mile delivery services by companies looking to enhance efficiency and reduce delivery times in congested urban areas. In line with this, as aging population is finding E-Bikes to be an accessible mode of transportation, as the electric assist helps address mobility challenges associated with age. Furthermore, governments worldwide are incentivizing the adoption of electric vehicles, including E-Bikes, through subsidies, tax benefits, and infrastructure development. These policies promote the growth of the E-Bike market. Moreover, ongoing advancements in E-Bike technology have led to improvements in battery life, motor efficiency, and overall performance. This has made E-Bikes more appealing and reliable to a broader consumer base.

E-Bike Market Trends/Drivers:

Growing Environmental Concerns

As climate change and air pollution become increasingly pressing issues, consumers are actively seeking greener alternatives for their daily transportation needs. E-Bikes have gained traction as an eco-friendly mode of transportation since they produce zero emissions and have a much lower environmental impact compared to traditional gasoline-powered vehicles. The reduction in greenhouse gas emissions associated with E-Bikes aligns with global sustainability goals and governmental efforts to mitigate environmental damage. As a result, consumers are choosing E-Bikes to reduce their carbon footprint and contribute to a cleaner, healthier planet, making environmental concerns a driving force behind the market's growth.

Rapid Urbanization

E-Bikes offer an ideal solution for urban commuters grappling with these issues. In densely populated cities, E-Bikes provide a convenient and efficient means of transportation. They allow riders to navigate through traffic with ease, often taking shortcuts inaccessible to cars, and eliminating the need for time-consuming parking searches. Additionally, E-Bikes can offer a faster and more reliable commute, as they are less susceptible to gridlock. This urbanization-driven demand for convenient,

nimble, and eco-friendly transportation options has led to increased adoption of E-Bikes as an integral part of urban mobility solutions.

Rising Health and Fitness Considerations

Many people are seeking ways to incorporate physical activity into their daily routines, and E-Bikes provide a practical solution. Unlike traditional bicycles, E-Bikes offer electric assistance, making it easier for riders to tackle hills, cover longer distances, or maintain a consistent pace. This accessibility encourages more individuals to take up cycling, even those who may have physical limitations or concerns about strenuous exercise. E-Bikes promote active lifestyles, improve cardiovascular health, and help reduce sedentary behavior, aligning with global health trends and wellness priorities. As a result, the health and fitness benefits associated with E-Bikes have become a driving force behind their market growth, attracting a diverse range of riders seeking both exercise and transportation convenience.

E-Bike Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global e-bike market report, along with forecasts at the global and regional levels for 2024-2032. Our report has categorized the market based on mode, motor type, battery type, class, design, and application.

Breakup by Mode:

Throttle

Pedal Assist

Pedal assist dominates the market

The report has provided a detailed breakup and analysis of the market based on the mode. This includes throttle and pedal assist. According to the report, pedal assist represented the largest segment.

Pedal assist e-bike offer a seamless blend of traditional cycling and electric assistance. This feature appeals to a broad spectrum of riders, including both avid cyclists and those new to biking. Cyclists can choose the level of assistance they require, making it versatile for various terrains and fitness levels. This flexibility encourages more people to adopt E-Bikes for daily commuting and recreational purposes. Furthermore, pedal assist technology promotes an active and healthy lifestyle. Riders must engage in

pedaling to activate the electric motor, ensuring they still engage in physical activity while benefiting from the electric boost. This aspect aligns with the growing emphasis on health and wellness, making pedal assist E-Bikes an attractive choice for individuals looking to incorporate exercise into their daily routines.

Breakup by Motor Type:

Hub Motor

Mid Drive

Others

Hub motor hold the largest share in the market

A detailed breakup and analysis of the market based on the motor type has also been provided in the report. This includes hub motor, mid drive, and others. According to the report, hub motor accounted for the largest market share.

Hub motors are integrated directly into the wheel hub, making them easy to install and maintain. This user-friendly design attracts a wide range of consumers, including those who may not have extensive technical knowledge. Moreover, hub motors typically require less maintenance than other motor types, reducing ownership costs and enhancing the overall ownership experience. Another significant factor is the silent and inconspicuous operation of hub motors. They produce very little noise, creating a smooth and unobtrusive riding experience. This feature is particularly appealing to urban commuters and recreational riders who value a quiet and pleasant journey. Furthermore, hub motors offer a wide range of power options, from lower wattage motors suitable for city commuting to high-performance variants for off-road adventures. This versatility allows E-Bike manufacturers to cater to various customer preferences and needs, further expanding the hub motor's market dominance. Moreover, hub motors are often less complex than other motor types, resulting in cost-effective E-Bike models. This affordability makes E-Bikes with hub motors accessible to a broader consumer base, driving their popularity in the market.

Breakup by Battery Type:

Lead Acid

Lithium Ion

Nickel-Metal Hydride (NiMH)

Others

Lead acid accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the battery type. This includes lead acid, lithium ion, nickel-metal hydride (NiMH), and others. According to the report, lead acid represented the largest segment.

Lead-acid batteries are well-established and have a long history of use in various applications. This extensive track record has instilled trust among consumers, particularly those who may be more cautious about adopting newer battery technologies. Familiarity often drives purchasing decisions, making lead-acid batteries a preferred choice for many E-Bike buyers. Additionally, lead-acid batteries are comparatively affordable, making E-Bikes equipped with these batteries more accessible to a wide range of consumers. Cost-conscious individuals, especially in emerging markets, are more likely to opt for E-Bikes with lead-acid batteries due to their budget-friendly pricing. Furthermore, lead-acid batteries are known for their durability and robustness. They can withstand a range of environmental conditions and provide consistent performance over time. This reliability is especially important for E-Bike users who rely on their vehicles for daily commuting or regular transportation needs. Moreover, lead-acid batteries tend to have a longer lifespan compared to some other battery types, further enhancing their appeal to consumers looking for a lower total cost of ownership.

Breakup by Class:

Class I

Class II

Class III

Class I holds the largest share in the market

A detailed breakup and analysis of the market based on the class has also been provided in the report. This includes class I, class II, and class III. According to the report, class I accounted for the largest market share.

Class I E-Bikes closely resemble traditional bicycles in terms of appearance and operation. They provide electric assistance only when the rider is actively pedaling, ensuring that the riding experience remains familiar to those who have ridden conventional bikes. This design caters to a wide range of consumers, including cycling

enthusiasts, commuters, and recreational riders, who may be looking for an easier and more enjoyable cycling experience without dramatically altering their riding habits. Moreover, Class I E-Bikes often enjoy favorable regulatory treatment in many regions. They are frequently classified as bicycles rather than motorized vehicles, resulting in fewer restrictions, such as reduced licensing requirements and access to bike lanes. This regulatory advantage encourages consumers to opt for Class I E-Bikes over other classes, further bolstering their market dominance. Additionally, Class I E-Bikes are suitable for various terrains, from city streets to light off-road trails, making them adaptable to different riding conditions and preferences. This versatility makes them a preferred choice for riders with diverse needs.

Breakup by Design:

Foldable

Non-Foldable

Non-foldable represent the most popular e-bikes design

The report has provided a detailed breakup and analysis of the market based on the design. This includes foldable and non-foldable. According to the report, non-foldable represented the largest segment.

Non-foldable E-Bikes offer a level of structural stability and durability that foldable models cannot match. This sturdiness is especially appealing to riders who prioritize reliability and longevity in their E-Bike investment. Non-foldable E-Bikes are typically built to withstand daily use and varied terrains, making them well-suited for both commuting and recreational purposes. Additionally, non-foldable E-Bikes often come in a wider range of styles and configurations, catering to diverse consumer preferences. Whether it's a classic city commuter, a robust mountain bike, or a sleek road bike, non-foldable E-Bikes offer an extensive variety of options to choose from. This variety ensures that riders can find a non-foldable E-Bike that aligns with their specific needs and riding style. Moreover, non-foldable E-Bikes generally offer superior performance in terms of stability and handling, making them a preferred choice for enthusiasts and riders seeking a more traditional cycling experience. These E-Bikes are often equipped with larger batteries and more powerful motors, providing longer range and improved overall performance.

Breakup by Application:

Mountain/Trekking Bikes
City/Urban
Cargo
Others

City/urban holds the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes mountain/trekking bikes, city/urban, cargo, and others. According to the report, city/urban accounted for the largest market share.

E-bikes are exceptionally well-suited for urban environments. With the increasing congestion in cities and concerns about air quality, people are seeking efficient and sustainable transportation options. City/urban E-Bikes offer a practical solution for daily commuting and navigating congested streets. Their electric assistance helps riders effortlessly cover distances, tackle hills, and maneuver through traffic, all while reducing travel times and minimizing the environmental impact. Furthermore, city/urban E-Bikes often come equipped with features tailored to urban living, such as integrated lighting systems, racks for carrying cargo, and comfortable seating. These features enhance their functionality and convenience for city dwellers, making them an ideal choice for running errands, commuting to work, or simply enjoying a leisurely ride in an urban setting. Additionally, city/urban E-Bikes tend to have a sleek and stylish design that complements the modern cityscape, appealing to riders looking for both functionality and aesthetics. Their versatility and adaptability to urban lifestyles make them the preferred choice for a wide range of consumers, solidifying their position as the largest segment in the E-Bike market's application breakdown.

Breakup by Region:

Asia Pacific
Europe
North America
Middle East and Africa
Latin America

Asia-Pacific exhibits a clear dominance in the market

The market research report has also provided a comprehensive analysis of all the major

regional markets, which include North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia Pacific is home to a significant portion of the world's population, with densely populated cities and a growing middle class. In such urban environments, E-Bikes provide an ideal solution to combat traffic congestion and offer a cost-effective means of transportation. The convenience and efficiency of E-Bikes align with the mobility needs of urban dwellers, driving their adoption. Additionally, governments in many Asia Pacific countries have actively promoted E-Bikes as a sustainable and eco-friendly mode of transportation. Subsidies, incentives, and supportive regulations have encouraged consumers to embrace E-Bikes as a viable alternative to traditional gasoline-powered vehicles, further boosting the market. Besides, the manufacturing capabilities of Asia Pacific countries, particularly China, have made E-Bikes more accessible and affordable. These economies of scale have resulted in a wide range of E-Bike options at competitive price points, expanding the market's reach across various consumer segments. Moreover, the Asia Pacific region's diverse landscape, including both densely populated urban centers and scenic rural areas, has contributed to the versatile use of E-Bikes for both daily commuting and recreational purposes.

Competitive Landscape:

Leading e-Bike manufacturers invest heavily in R&D to develop cutting-edge technologies and improve the overall performance of E-Bikes. This includes advancements in battery technology, motor efficiency, and smart connectivity features, all of which enhance the riding experience. Additionally, key players continuously expand their product portfolios to cater to diverse consumer preferences. They offer a wide range of E-Bike styles, including city commuters, mountain bikes, and folding models, ensuring that there is an E-Bike for every need and lifestyle. Other than this, numerous industry leaders prioritize sustainability by incorporating eco-friendly materials, optimizing supply chains, and reducing carbon footprints in E-Bike production. This aligns with the growing demand for environmentally responsible products. Besides this, leading companies are actively expanding their presence in emerging markets, such as Asia and Latin America, where the E-Bike market is experiencing rapid growth. This includes establishing local manufacturing facilities and distribution networks. In line with this, key players invest in marketing campaigns to raise awareness about the benefits of E-Bikes and educate consumers about their advantages. They also collaborate with local governments and organizations to promote E-Bike usage in urban mobility plans. Moreover, providing excellent customer support and after-sales services is a priority. This includes warranty coverage, maintenance

services, and readily available spare parts to ensure customer satisfaction and loyalty.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Accell Group
BIONX International Corporation
Robert Bosch GmbH
Yamaha Motor Group
Derby Cycle Holding GmbH
Giant Group
Kwang Yang Motor Company Ltd
Merida & Centurion Germany GmbH (MCG)
Samsung Electronics Co. Ltd
Continental AG
Prodeco Technologies LLC
Tianjin Fuji-ta Group Co. Ltd
Trek Bicycle Corporation
Pedego Inc
Shimano Inc.

Recent Developments:

Pedego Inc. introduced their latest innovation, the Pedego Avenue e-bike, equipped with a powerful 500-watt motor, ensuring a smooth and efficient ride. Its balanced frame geometry is designed to provide optimal stability and control, making it an excellent choice for riders of all skill levels. One standout feature of the Pedego Avenue is its integrated battery system. This innovation not only enhances the aesthetics of the bike but also offers practical benefits. The integrated battery ensures a sleek and streamlined appearance while providing ample power to conquer challenging terrains, including those pesky hills that can be a daunting obstacle for many riders.

Yamaha Motor Group has recently expanded its lineup of electric-assist bicycles by introducing two new models designed for all-terrain mobility. These additions to their sports electric-assist bicycle range represent a significant stride in the world of electric bikes, catering to riders who seek versatile and capable options for various terrains. The first notable feature of these new Yamaha e-bike models is their robust design, specifically engineered to handle a wide range of terrains.

Giant Group has recently unveiled an exciting addition to their lineup – the all-new Trance XE+ electric mountain bike (E-MTB). This bike represents a significant leap forward in the world of electric mountain biking, offering riders versatility and adaptability

to conquer a wide range of terrains and challenges. One of the standout features of the Trance XE+ is its versatility. This E-MTB is designed to be a true all-rounder, capable of extending the rider's capabilities on a multitude of terrains.

Key Questions Answered in This Report

1. What was the global e-bike market size in 2023?
2. What will be the global e-bike market outlook during the forecast period 2024-2032?
3. What are the global e-bike market drivers?
4. What are the major trends in the global e-bike market?
5. What is the impact of COVID-19 on the global e-bike market?
6. What is the global e-bike market breakup by mode?
7. What is the global e-bike market breakup by motor type?
8. What is the global e-bike market breakup by battery type?
9. What is the global e-bike market breakup by class?
10. What is the global e-bike market breakup by design?
11. What is the global e-bike market breakup by application?
12. What are the major regions in the global e-bike market?

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