

# **Africa ICE Two-Wheeler Market Assessment, By Vehicle Type [Motorcycle, Scooters, Mopeds], By Engine Capacity [Less than 125cc, 126-250cc, 251-500cc, 501cc and Above], By Application [Private; Commercial-Service, Industrial], By Region, Opportunities, and Forecast, 2018-2032F**

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## **Abstracts**

Africa ICE Two-Wheeler Market is anticipated to reach USD 4.89 billion in 2032 at CAGR of 3.61% during the forecast period between 2025 and 2032. The market was valued at USD 3.68 billion in 2024. The African ICE two-wheeler market is expected to register subdued growth over the next several years due to rising popularity of electric two-wheelers as compared to ICE two wheelers. However, significant factors such as that are supporting demand for two-wheelers are its usage for daily commuting amidst traffic congestion in several densely populated cities of Africa.

There are various other factors that drive the demand for ICE two wheelers such as affordability, ease of purchase, lower maintenance costs compared to four-wheelers which all are contributing to the growth of the African ICE two-wheeler market over the forecast period. Furthermore, in emerging economies, the absence of public transport infrastructure has contributed to the rapidly increasing demand for motorcycle taxis, which in turn has supported the rising demand for ICE two-wheelers.

Further supporting the projected expansion of the African ICE two-wheeler market over the next seven years are the establishment of production facilities by the world's largest two-wheeler manufacturers, who will benefit from access to inexpensive labour and components. Due to their lightweight design and powerful engines, two-wheeler motorcycles can accelerate more quickly and hence are becoming more popular than

other types of ICE two wheelers especially among the younger, aspirational population of African countries.

However, factors such as several countries that have underdeveloped economy in Africa, consumer preferences for inexpensive two-wheeler models due to lower disposable income and demand for cheaper, simple to maintain vehicles will limit the growth of the ICE two-wheeler market in value terms.

### Expansion in E-Commerce Drives Two-Wheeler Demand in Africa

The growing requirement for motorcycles in the urban transportation and delivery sector is projected to drive the Africa ICE two-wheeler market in the forecast period. This shift is propelled by rapid urbanization, improper public transport systems and growing requirements for last-mile delivery services in the Africa. With unreliable public mobility and overcrowded roadways, motorcycles offer a faster and more flexible mode of transport, specifically for short distances. Their easy accessibility and fuel effectiveness make them a fascinating alternative to cars, especially for the urban middle-class and low-income workers. Companies in the market for logistics and delivery are heavily dependent on two-wheelers for fast and cost-effective online shopping and food delivery trends across African cities, which further drives the Africa ICE two-wheeler market demand. Also, companies in the market are introducing new concepts in two-wheelers to expand the market portfolio.

For instance, in March 2024, EDAG Group and Baier Motors GmbH announced to development of a motorcycle concept designed specifically for Africa to meet all sector requirements when it comes to reliability, robustness, and product features.

### Significant Growth for Motorcycle Taxis

Motorcycle taxis are known as 'Boda Boda' across the majority of Africa, including Nigeria, Uganda, Kenya, and other Eastern African nations, and they play a significant role in increasing the sales of two-wheelers. A growing number of urban and rural communities in Africa utilise motorcycle taxis primarily to transport goods and passengers thus supporting last mile reach.

### Sales Trend of Used Two-Wheelers

Due to the paucity of large two-wheeler manufacturing facilities in African nations during the historic period, imports of two-wheelers from countries such as India and China

were a major source of catering to the rising demand. Most of the countries in Africa that were witnessing rising demand had limited local two-wheeler assembly and production capacity, which promoted the used ICE two-wheeler market both domestically and through imports. As a result, it is anticipated that the expansion of the ICE two-wheeler market in Africa will be limited by the rising sales of used two-wheelers.

### Impact of COVID-19 on Africa ICE Two-Wheeler Market

The COVID-19 induced lockdown caused a halt in production that hampered the supply of ICE two-wheelers in several countries of Africa. The ICE two-wheeler market witnessed massive decline in both supply and demand for two wheelers because most of the countries in the region were forced to announce temporary lockdown. Due to the unavailability of port infrastructure and workers, many two-wheeler manufacturing companies were unable to execute their export shipments. Thus, these developments had severely disrupted import-export operations throughout African region across many automobile vehicle types particularly two wheelers.

Post COVID-19 situation, the largely impacted economy of Africa, witnessed a speedy recovery as there was a significant growth demand & import trade and restoration of supply chain network in the automobile and transportation industry. Many global two-wheeler manufacturers are now exporting ICE two wheelers to the African region due to the growing demand for shared mobility and also improving economic conditions post pandemic.

### Impact of Russia-Ukraine War on Africa ICE Two-Wheeler Market

While the African economy was on the path to stable recovery post pandemic, global supply chain disruptions caused due to the Russia Ukraine war which raised fuel prices, disrupted global trade in the automobile industry and specifically for the two wheelers market in Africa. As a result of these factors and increase in price of fuel led to the temporary decrease in demand for ICE two-wheelers.

### Key Player Landscape and Outlook

TVS Motor Company Limited, Bajaj Auto Limited, Honda Motor Company Limited, Hero MotoCorp Ltd. are some of the key players that are operating in the African two-wheeler market. These players have been investing in several product innovations. Additionally, global competitors in the market are gaining from strategic business actions such as

mergers & acquisitions and collaborations with local players. These actions are helping them to grow their client bases and their sales and distribution networks in the African two-wheeler market. For instance:

TVS Motor Company announced the launch of TVS Star HLX 150 Disc Variant motorcycle in Egypt in January 2022. In order to provide both rural and urban Egyptian commuters, a modern and appealing personal mobility choice, the company launched this product with several innovations. The brand-new TVS Star HLX 150 cc Disc variation, which offers distinctive value proposition including high durability, comfort and appealing look has been added to the Egyptian two-wheeler line up by TVS.

Earlier, in June 2021, Hero MotoCorp unveiled the 'Hunter,' a brand-new motorcycle created specifically for the Nigerian market. Modern technology in the Hunter gives customers best fuel efficiency, longer engine life and long as well as wider seat thus ensuring higher ride comfort. For the motorcycle's engine to function properly in the tough Nigerian conditions, extensive testing had been performed by the company to launch a localised product.

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