

Connected Motorcycle Market by Hardware (Embedded, Tethered), Calling Service, Communication Type (V2V, V2I), Network Type (C-V2X, DSRC), End-User (Private, Commercial), Service, Motorcycle Type, Application, Propulsion & Region - Global Forecast to 2027

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Abstracts

The global connected motorcycle market size is projected to grow from USD 55 Million in 2021 to USD 757 Million by 2027, at a CAGR of 54.7%. Factors such as growing demand for connectivity devices in motorcycles, measures by governments for improving rider safety for motorcycles, increased demand for real-time vehicle dynamics and motorcycle tracking have been increasing the demand for connected motorcycles around the world. The growing demand for services like driver behavioral recording and usage-based insurance will further increase the demand for connected motorcycle technology.

“Embedded Segment is expected to be the largest market in the hardware segment in the forecast.”

The embedded connectivity system can offer advanced safety features that require onboard GPS, cellular connectivity, and superior control unit to be reliable. For instance, Motorcycle Approach Indication (MAI) is a key feature for riders. This feature relies heavily on the accurate onboard GPS unit and fast communication systems. Embedded hardware is superior to tethered hardware. For real-time safety features, connectivity systems cannot depend on smartphones or any other inferior quality dongles. Hence, embedded hardware will be a preferred choice of motorcycle manufacturers to offer reliable safety features in the future.

“Asia Pacific is expected to be the fastest-growing market during the forecast period.”

The Asia Pacific region comprises major motorcycle markets such as China, India, Indonesia, the Philippines, and Vietnam. The region accounted for more than 90% of the global motorcycle sales in 2020. As two-wheelers are a preferred mode of transportation due to affordability and low maintenance, Asian countries such as India, Thailand, Indonesia, and Vietnam have a high motorcycle penetration. Mid and budget-segment motorcycles dominate the market in these countries. However, with a steady increase in disposable income and rising demand for high-performance motorcycles, the region has attracted a number of premium motorcycle manufacturers.

The region is home to some of the most innovative motorcycle manufacturers, such as Honda, Kawasaki, Yamaha, and Suzuki. These OEMs are taking active participation in the Connected Motorcycle Consortium to develop connectivity services for motorcycles. They have already launched bestselling motorcycles in the budget segment with connectivity features. The region is also home to some of the top connected motorcycle software providers in the world. Companies like Delphi Automotive, Infineon Technologies, and KPIT have been working to develop automotive technologies including connected mobility and autonomous technology. This has increased the demand for connected mobility devices in the APAC region. Increasing collaborations to provide a safe and comfortable riding experience will boost the adoption of connected motorcycles in the region. The high sales volume of motorcycles would drive the growth of the connected motorcycle market in the Asia Pacific region. With a small percentage of motorcycles becoming connected over the years, the Asia Pacific market would easily surpass other markets due to high sales of two-wheelers in the coming years. Also, international motorcycle manufacturers have entered this regional market and introduced sports and adventure motorcycles with high displacement engines. Increasing millennial preference for high-performance motorcycles and changing lifestyles would boost the market growth in this region.

“North America to be the largest region as of 2021 and one of the largest regions during the forecast period”

The North American automotive industry is one of the most advanced industries in the world. The North American Free Trade Agreement (NAFTA) has fostered the growth of the automotive industry in the region. The US, which has traditionally been a global technological leader, is the largest premium motorcycle market in North America. The large customer base and high disposable income levels in the country have fueled the

demand for adventure and sport motorcycles. The increasing demand for premium segment motorcycles would boost the market for connected motorcycles in the future. OEMs are continuously looking for measures to provide a comfortable riding experience in this motorcycle segment. The inclusion of connectivity systems in this segment would facilitate driver assistance and vehicle management services in the initial stage.

OEMs like Harley Davidson, Zero Motorcycles, and Indian Motorcycle have been developing connected motorcycles in the North American market. Harley Davidson, for instance, launched its LiveWire EV motorcycle in the North American market in July 2021. Indian Motorcycle also has its connected motorcycle app called Ride Command, which can work with its connected motorcycles. Its Scout, FTR Rally, Chief Dark Horse, Indian Springfield, and Roadmaster come with this Ride Command app. Further, Zero Motorcycles provides connected motorcycles like SR/F, which comes with a Helios vehicle tracking system developed by Starcom Systems and Facomsa Instrument Cluster. Its SR/S smart motorcycle became the world's first smart motorcycle, while its SR model also comes with advanced connectivity features. The presence of top software providers, service platform providers, and network providers in this region has also increased the demand for connected motorcycles. These companies have supported the growth of the connected motorcycle ecosystem through partnerships with OEMs and hardware providers across the value chain.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: Tier I - 67%, Tier II - 9%, and OEMs - 24%

By Designation: C Level Executives - 33%, Directors - 52%, and Others - 15%

By Region: North America - 40%, Europe - 22%, Asia Pacific - 30%, LATAM – 4%, RoW – 4%

The connected motorcycle market is dominated by Major OEMs including Yamaha (Japan), Suzuki (Japan), Kawasaki (Japan), BMW (Germany), and Harley Davidson (US) and component manufacturers include Bosch (Germany) and Continental AG (Germany). Many software providers, including Starcom Systems (UK), KPIT (India), and e-Novia (Italy), work with platform providers like IBM (US) and Amazon AWS (US) and network providers like Vodafone (UK) and Verizon (US) to develop product and

service offerings for the connected motorcycle ecosystem. They have initiated partnerships to develop their connected motorcycle technology and provide finished products to their respective customers for the connected motorcycle market.

Research Coverage:

The report covers the connected motorcycle market, in terms of Hardware (Embedded, Tethered), Calling Service (eCall, bCall, iCall), Communication Type (V2V, V2I), Network Type (C-V2X, DSRC), End-User (Private, Commercial), Service, Motorcycle Type, Application, Propulsion and Region (Asia Pacific, Europe, North America, Latin America and Rest of the World). It covers the competitive landscape and company profiles of the major players in the connected motorcycle ecosystem.

The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market with information on the closest approximations of revenue numbers for the overall connected motorcycle market and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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