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Electric Scooter Market by Vehicle (E-Scooter/Moped, E-Motorcycle), Voltage (36V, 48V, 60V, 72V, Above 72V), Motor Type (Hub and Mid-drive), Battery (Li-ion and lead acid), Motor Power, Technology, Vehicle Class, Usage & Region - Global Forecast to 2030

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Abstracts

The global electric scooter market is projected to grow from USD 4.3 Billion in 2024 to USD 12.4 Billion by 2030, registering a CAGR of 18.9%. The electric scooter market is experiencing rapid growth due to several key factors. Rising environmental concerns push consumers towards greener transportation options, while government incentives and subsidies make electric scooters more affordable and appealing. Advancements in battery technology extend the range and reduce charging times, enhancing overall convenience. Additionally, implementing battery-swapping technology offers quick and easy ways to recharge, addressing one of the major barriers to adoption. Finally, rapid urbanization is creating a demand for efficient and compact modes of transport, perfectly suited to electric scooters.

“Rising demand for high-performance and low-maintenance models to drive e-motorcycle market.”

Electric motorcycles represent a revolutionary shift in the world of motorcycling, offering riders a thrilling and sustainable alternative to traditional gasoline-powered bikes. Electric motors power them and rely on rechargeable batteries for energy, eliminating the need for gasoline and reducing harmful emissions. With advancements in battery technology and electric motor efficiency, electric motorcycles deliver improved performance, including instant torque delivery, smooth acceleration, and quiet operation. Additionally, electric motorcycles boast lower operating costs and reduced maintenance requirements than their gasoline counterparts, making them an attractive

option for riders seeking a more economical and environmentally friendly mode of transportation. Motorcycles serve various purposes, such as cruising, racing sports, off-roading, and commuting. Initially, few companies were manufacturing electric motorcycles due to their design complexities. However, several established companies, such as Ola Electric (India), Niu International (China), Vmoto (Australia), Harley Davidson (US), and KTM (Austria), among others, have started manufacturing electric motorcycles. Electric motorcycles have transformed with improved range and speed over the years.

Many companies are exploring this space and investing to tap the market. In November 2023, The Yadea Technology Group Co., Ltd. unveiled the Yadea Kemper electric motorcycle at the EICMA 2023 Milan Motorcycle Show. The motorcycle has a top speed of 160 km/h (99.4 mph) and a centrally-mounted motor rated for 23 kW of continuous power and 40 kW of peak power. Ola is expected to launch four electric motorcycles in 2024–2025, including the Ola Roadster, Ola Cruiser, and Ola Adventure. In January 2023, Hero Electric (India) entered into a long-term partnership with Maxwell Energy Systems (India) to supply advanced battery management systems. Under the partnership, Maxwell supply Hero Electric with more than 10 lakh units of its battery management systems (BMS) over the next three years.

“High torque advantage of mid-drive motors to drive market”

Electric two-wheelers have advanced technologically with mid-drive motors centrally located within the frame to provide the best possible weight distribution and handling. These motors deliver efficient power directly to the drivetrain, enhancing torque and performance, particularly in challenging terrains like hills. Their versatility extends to compatibility with existing electric scooters or motorcycles, offering riders a seamless transition to electrified mobility. With a focus on maximizing range and energy efficiency, mid-drive motors provide a dynamic and responsive riding experience, making them a preferred choice for those seeking a balance of power and practicality in their electric two-wheelers.

Companies such as Ather Energy (India) and River (India) have adopted a mid-mounted motor for their scooters. Performance-oriented electric scooters such as Ola S1 Pro and TVS’ X also have mid-mounted Permanent Magnet Synchronous Motor (PMSM) motors. In April 2024, Ather Energy launched the Ather Rizta family electric scooter with a mid-drive motor layout, the same as the Ather 450 series, but with lower peak output. Ather Rizta offers a range of 123-160 km per charge with a mid-drive 4.3 kW PMSM motor.

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“Versatility and range anxiety reduction to drive demand for 75–100 miles range electric two-wheeler”

Manufacturers have recognized the demand for higher-range electric scooters and motorcycles after a single full battery charge. Hence, they are launching electric motorcycles and scooters ranging from 75 to 100 miles. These scooters offer a compelling balance between portability and capability, making them ideal for a wider range of riders. They cater to individuals requiring more than short-distance errands, providing the flexibility to handle daily commutes, recreational riding, and even spontaneous trips. This segment strikes a crucial balance, offering enough range to alleviate range anxiety while maintaining a practical size and potentially lower cost than long-range counterparts. This segment is dominated by performance electric motorcycles, and manufacturers are expected to focus on developing two-wheelers with a range of above 75 miles. Performance electric motorcycles are popular among motorcycle enthusiasts who prefer high power and long driving range. Electric scooter manufacturers also offer longer ranges in their electric scooter models. For instance, In December 2023, Ola Electric commenced the deliveries of its new S1 X+ electric scooter in the Indian market. The S1 X+ is equipped with a 3 kWh battery, offering a range of 93 miles (151 km).

“Emerging demand for high-performance electric scooters to drive segment”

60 V offers a significant boost in power output in electric scooters. This translates to better acceleration, higher top speeds, and the ability to handle steeper inclines, which is ideal for riders who want more performance from their electric scooters or motorcycles. While offering more power, 60 V batteries can also be paired with larger-capacity cells, extending the potential travel range of an electric scooter or motorcycle. This caters to riders who need to cover longer distances or want the peace of mind of a larger range. Manufacturers of electric motorcycles and scooters/mopeds prefer batteries with a 60 V or higher capacity. For instance, Yadea Technology Group Co., Ltd., one of the biggest Chinese premium electric scooter manufacturers, offers electric scooters named YADEA M6L, YADEA G5, YADEA C1S, and others with a 60 V battery capacity. Niu International is another company in China that offers electric scooters with a 60 V battery capacity. Rainbow Electric Scooter by Jiangsu Xinri is also one of the e-scooter models equipped with a 60 V battery.

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

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this market.

By Company Type: OEMs – 30%, Tier I – 30%, Tier II– 40%,

By Designation: CXOs – 35%, Directors– 20%, Others– 45%

By Region: North America– 15%, Europe – 15%, Asia Pacific– 70%

The electric scooter market is dominated by global players such as Yadea Technology Group Co., Ltd. (China), Ola Electric (India), TVS Motor Company (India), Ather Energy (India), and Gogoro (Taiwan). These companies adopted strategies such as product development, deals, expansion and others to gain traction in the market.

Research Coverage:

The market study covers the electric scooter market size and future growth potential across different segments by vehicle type, battery type, distance covered, voltage, technology type, vehicle class, usage, motor type, motor power, and region. 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 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 electric scooter 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.

The report provides insights on the following pointers:

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Analysis of key drivers (Rising environmental concerns, Government incentives and subsidies, Advancements in battery technology, Implementation of battery swapping technology, Rapid urbanization), restraints (Low number of charging stations in emerging economies, Lack of power output and limited range, Battery heating issues and long charging time), opportunities (Government bodies backing electric two-wheelers, Decreasing prices of batteries, New revenue pockets in Asia Pacific and Europe, Use of IoT and smart infrastructure in electric two-wheeler charging stations for load management), and challenges (Initial investments and high cost of electricity, Lack of compatibility, interchangeability, and standardization, Technological barriers related to battery development)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the electric scooter market

Market Development: Comprehensive information about lucrative markets – the report analyses the electric scooter market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the electric scooter market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Yadea Technology Group Co., Ltd. (China), Ola Electric (India), TVS Motor Company (India), Ather Energy (India), Gogoro (Taiwan) and among others in the electric scooter market.

Strategies: The report also helps stakeholders understand the pulse of the automotive airbags & seatbelts market and provides them information on key market drivers, restraints, challenges, and opportunities

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