

ASEAN Two-Wheeled Electric Vehicle Industry Research Report 2026-2030

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Abstracts

A two-wheeler electric vehicle is a lightweight mode of transportation that operates on a two-wheeled structure and utilizes an electric propulsion system to replace a traditional fuel-powered engine.

Two-wheeled electric vehicles primarily include electric bicycles (e-bikes), electric scooters (e-scooters) and electric motorcycles.

According to the analysis by CRI, key drivers of demand in the ASEAN two-wheeled electric vehicle market include shifts in urban commuting patterns, fluctuations in fuel prices, environmental protection policies and the expansion of the delivery sector.

In Vietnam, Indonesia, Thailand and Philippines, motorcycles serve as the primary mode of transportation, presenting immense potential for electric substitution.

Vietnam stands out as the market with the fastest-rising penetration rate for electric two-wheelers, driven by its high population density and substantial existing fleet of motorcycles.

Leveraging its market size and resource advantages, Indonesia is gradually absorbing the production capacity transfer from Chinese companies and exploring the construction of a local battery supply chain.

According to CRI analysis, the ASEAN two-wheeled electric vehicle market will enter a phase of accelerated penetration in the next 3-5 years.

Influenced by the drastic volatility of international oil prices, governments across ASEAN

nations are expected to gradually introduce restrictive policies on fuel-powered motorcycles or subsidy mechanisms for electrification, aiming to accelerate the replacement of existing fleets.

CRI recommends that global two-wheeled electric vehicle manufacturers, distributors, vehicles parts manufacturers and investment institutions conduct timely market research on the ASEAN region to prepare for their strategic entry into the ASEAN two-wheeled electric vehicle market.

Key Contents

Overview of the Two-Wheeled Electric Vehicle Industry in ASEAN

Economic and Policy Environment of Two-Wheeled Electric Vehicle Industry in ASEAN

Analysis of the Two-Wheeled Electric Vehicle Industry in Major ASEAN Countries

Market Size of Two-Wheeled Electric Vehicle in ASEAN (2021–2025)

Analysis of Key Companies in the ASEAN Two-Wheeled Electric Vehicle Industry

Key Drivers and Market Opportunities of Two-Wheeled Electric Vehicle Industry in ASEAN

What are the key drivers, challenges and opportunities for the ASEAN two-wheeled electric vehicle industry during the forecast period of 2026–2030?

Which companies are the major market players in the ASEAN two-wheeled electric vehicle industry and what are their competitive advantages?

What is the projected revenue for Two-Wheeled Electric Vehicle market in ASEAN during the forecast period of 2026–2030?

What strategies have major market players adopted to increase their market share within this industry?

Which segment of the ASEAN two-wheeled electric vehicle market is expected to dominate the market by 2030?

What are the major headwinds facing the ASEAN two-wheeled electric vehicle industry?

How can foreign capital enter the two-wheeled electric vehicle industry in ASEAN?

Contents

1 OVERVIEW OF ASEAN

- 1.1 Geography
- 1.2 Demographic Structure
- 1.3 Economic Situation
- 1.4 Minimum Wage Standards

2 OVERVIEW OF THE TWO-WHEELED ELECTRIC VEHICLE INDUSTRY

- 2.1 Definition and Classification of the Two-Wheeled Electric Vehicle Industry
 - 2.1.1 Industry Definition
 - 2.1.2 Classification
- 2.2 Analysis of Two-Wheeled Electric Vehicle Industry Chain
- 2.3 Policy Environment of Two-Wheeled Electric Vehicle Industry in ASEAN
- 2.4 CRI's Suggestions for Foreign-Invested Enterprises Investing in the ASEAN Two-Wheeled Electric Vehicle Industry

3 ANALYSIS OF SUPPLY AND DEMAND IN THE ASEAN TWO-WHEELED ELECTRIC VEHICLE INDUSTRY

- 3.1 Supply Analysis of the Two-Wheeled Electric Vehicle Industry in ASEAN
 - 3.1.1 Two-Wheeled Electric Vehicle Supply in ASEAN
 - 3.1.2 Production of Two-Wheeled Electric Vehicle in ASEAN
 - 3.1.3 Factors Influencing the Production of Two-Wheeled Electric Vehicle in ASEAN
- 3.2 Demand Analysis of the Two-Wheeled Electric Vehicle Industry in ASEAN
 - 3.2.1 Sale Volume of Two-Wheeled Electric Vehicle
 - 3.2.2 Replacement Market Size
 - 3.2.3 Factors Influencing Demand for Two-Wheeled Electric Vehicle in ASEAN

4 IMPORT AND EXPORT OF THE TWO-WHEELED ELECTRIC VEHICLE INDUSTRY IN ASEAN

- 4.1 Import Overview of Two-Wheeled Electric Vehicle in ASEAN
 - 4.1.1 Import Volume of Two-Wheeled Electric Vehicle in ASEAN
 - 4.1.2 Major Sources of Two-Wheeled Electric Vehicle Imports in ASEAN
- 4.2 Export Overview of Two-Wheeled Electric Vehicle in ASEAN
 - 4.2.1 Export Volume of Two-Wheeled Electric Vehicle in ASEAN

4.2.2 Major Destinations for Two-Wheeled Electric Vehicle Exports in ASEAN

5 ANALYSIS OF THE TWO-WHEELED ELECTRIC VEHICLE INDUSTRY IN MAJOR ASEAN COUNTRIES

5.1 Singapore

5.1.1 Overview of the Two-Wheeled Electric Vehicle Industry

5.1.2 Analysis of Two-Wheeled Electric Vehicle Market Supply and Demand

5.2 Malaysia

5.2.1 Overview of the Two-Wheeled Electric Vehicle Industry

5.2.2 Analysis of Two-Wheeled Electric Vehicle Market Supply and Demand

5.3 Thailand

5.3.1 Overview of the Two-Wheeled Electric Vehicle Industry

5.3.2 Analysis of Two-Wheeled Electric Vehicle Market Supply and Demand

5.4 Indonesia

5.4.1 Overview of the Two-Wheeled Electric Vehicle Industry

5.4.2 Analysis of Two-Wheeled Electric Vehicle Market Supply and Demand

5.5 Vietnam

5.5.1 Overview of the Two-Wheeled Electric Vehicle Industry

5.5.2 Analysis of Two-Wheeled Electric Vehicle Market Supply and Demand

5.5 Philippines

5.5.1 Overview of the Two-Wheeled Electric Vehicle Industry

5.5.2 Analysis of Two-Wheeled Electric Vehicle Market Supply and Demand

6 ANALYSIS OF THE TOP 5 TWO-WHEELED ELECTRIC VEHICLE COMPANIES IN ASEAN

6.1 VinFast

6.1.1 Company Overview

6.1.2 Operations Status

6.2 Honda

6.2.1 Company Overview

6.2.2 Operations Status

6.3 Polytron

6.3.1 Company Overview

6.3.2 Operations Status

6.4 Yadea

6.4.1 Company Overview

6.4.2 Operations Status

6.5 TAILG

6.5.1 Company Overview

6.5.2 Operations Status

7 OUTLOOK OF TWO-WHEELED ELECTRIC VEHICLE INDUSTRY IN ASEAN 2026-2030

7.1 Analysis of Development Factors of Two-Wheeled Electric Vehicle Industry in ASEAN

7.1.1 Drivers and Growth Opportunities of Two-Wheeled Electric Vehicle Industry in ASEAN

7.1.2 Threats and Challenges of Two-Wheeled Electric Vehicle Industry in ASEAN

7.2 Forecast of Supply for Two-Wheeled Electric Vehicle Industry in ASEAN

7.3 Forecast of Demand for Two-Wheeled Electric Vehicle in ASEAN

7.4 Forecast of Imports and Exports for Two-Wheeled Electric Vehicle Industry in ASEAN

List Of Charts

LIST OF CHARTS

Chart Total Population in ASEAN, 2021–2025

Chart Per Capita GDP in ASEAN, 2021–2025

Chart Policies Related to the Two-Wheeled Electric Vehicle Industry Issued in ASEAN, 2021–2025

Chart Production for Two-Wheeled Electric Vehicle in ASEAN, 2021–2025

Chart Sale Volume for Two-Wheeled Electric Vehicle in ASEAN, 2021–2025

Chart Sale Volume for Two-Wheeled Electric Vehicle in Singapore, 2021–2025

Chart Sale Volume for Two-Wheeled Electric Vehicle in Malaysia, 2021–2025

Chart Sale Volume for Two-Wheeled Electric Vehicle in Thailand, 2021–2025

Chart Sale Volume for Two-Wheeled Electric Vehicle in Indonesia, 2021–2025

Chart Sale Volume for Two-Wheeled Electric Vehicle in Vietnam, 2021–2025

Chart Imports of Two-Wheeled Electric Vehicle in ASEAN, 2021–2025

Chart Exports of ASEAN's Two-Wheeled Electric Vehicle, 2021–2025

Chart Production Forecast of Two-Wheeled Electric Vehicle in ASEAN, 2026–2030

Chart Sale Forecast of Two-Wheeled Electric Vehicle in ASEAN, 2026–2030

Chart Import and Export Forecast of Two-Wheeled Electric Vehicle in ASEAN, 2026–2030

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