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Asia Pacific Electric Two-Wheeler Market Forecasts to 2032 – Global Analysis By Vehicle Type (Electric Scooters, Electric Motorcycles, Electric Mopeds, and E-Bikes), Propulsion Type, Battery Type, Voltage Capacity, Battery Capacity, Technology, End User and By Geography

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Abstracts

According to Stratistics MRC, the Asia Pacific Electric Two-Wheeler Market is accounted for $17.61 billion in 2025 and is expected to reach $45.43 billion by 2032 growing at a CAGR of 14.5% during the forecast period. The Asia Pacific Electric Two-Wheeler market refers to the segment of electric-powered motorcycles, scooters, and mopeds used for personal and commercial transportation across countries in the Asia Pacific region. These vehicles are powered by rechargeable batteries and electric motors, offering an eco-friendly alternative to traditional fuel-based two-wheelers. Driven by urbanization, environmental concerns, and government incentives, this market is rapidly expanding, especially in countries like China, India, Japan, and Southeast Asian nations.

Market Dynamics:

Driver:

Growing e-commerce and delivery sectors

With densely populated urban centers and rising demand for fast, cost-effective deliveries, electric scooters and bikes offer an ideal solution due to their low operating costs, maneuverability, and eco-friendliness. Countries like India, China, and those in

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Southeast Asia are witnessing a surge in demand from logistics and food delivery platforms. Government incentives, improved battery technologies, and expanding charging infrastructure further accelerate adoption. As urban mobility evolves, electric two-wheelers are becoming indispensable for sustainable, efficient transport in Asia-Pacific's booming digital economy.

Restraint:

Lack of charging infrastructure

Many countries in the region, including India, Indonesia, and Vietnam, face inadequate public charging networks, especially in semi-urban and rural areas. The limited number of fast-charging stations and poor grid connectivity in remote locations hinder adoption, while inconsistent policies and fragmented investments further slow development. Consumers often experience range anxiety and are reluctant to shift from conventional vehicles due to the inconvenience of locating reliable charging points. Additionally, high installation costs and limited incentives for private players to build infrastructure add to the challenge, delaying the large-scale transition to electric two-wheelers across the region.

Opportunity:

Rising disposable incomes

As economies such as China, India, Indonesia, and Thailand witness steady economic development, a growing middle-class population with increased purchasing power is emerging. This shift enables more consumers to afford electric two-wheelers, which are seen as cost-effective, modern alternatives to conventional bikes. Enhanced affordability also encourages the adoption of premium electric models offering better range, features, and performance. Urbanization and lifestyle changes are further prompting young consumers to opt for cleaner and more efficient mobility solutions. Additionally, higher disposable incomes support greater willingness to invest in sustainable transportation, accelerating demand for electric two-wheelers across the region.

Threat:

Supply chain disruptions

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The sector has faced bottlenecks in sourcing critical components such as semiconductors, lithium-ion batteries, and rare earth magnets especially from China, a dominant supplier. These disruptions have been exacerbated by geopolitical tensions, pandemic aftershocks, and logistical constraints across borders. Countries like India and Vietnam, which are rapidly scaling up E2W production, struggle with delays and cost volatility due to their dependence on imported parts. While some manufacturers are localizing supply chains and forming regional partnerships, the lack of resilient, diversified sourcing continues to hinder consistent production and timely delivery of electric two-wheelers across Asia-Pacific.

Covid-19 Impact:

The COVID-19 pandemic significantly impacted the Asia Pacific electric two-wheeler market, causing initial supply chain disruptions and declining sales due to lockdowns and economic uncertainty. However, the crisis also accelerated a shift toward sustainable and affordable mobility solutions. Rising fuel prices, increased environmental awareness, and government incentives for electric vehicles boosted demand post-lockdown. As urban consumers prioritized health and cost-effective transport, the region witnessed a strong recovery, positioning electric two-wheelers as a key player in post-pandemic urban mobility.

The electric mopeds segment is expected to be the largest during the forecast period

The electric mopeds segment is expected to account for the largest market share during the forecast period, due to rising urban congestion, increasing fuel prices, and growing environmental awareness. These compact, cost-effective vehicles are ideal for short commutes and last-mile delivery, especially in densely populated cities across India, China, and Southeast Asia. Government incentives, such as subsidies and tax breaks, further encourage adoption. Technological advancements in battery efficiency and the rise of shared mobility platforms also contribute to the surging demand for electric mopeds in the region.

The lead-acid batteries segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the lead-acid batteries segment is predicted to witness the highest growth rate, due to their low upfront cost and widespread local manufacturing, making them affordable and easily replaceable. The established charging and swapping infrastructure supports their convenience and accessibility. Additionally, simpler

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recycling systems and mature supply chains reduce environmental and logistical barriers, appealing to budget-conscious consumers and fleet operators in emerging markets where cost-effectiveness outweighs performance limitations.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, owing to rapid urbanization and population density, which amplify demand for compact, congestion busting transport. Government policies such as subsidies, tax breaks, and emission standards in China, India, Thailand, and beyond, heavily promote electric vehicle adoption. Falling battery costs, improving lithium-ion technology, and expanding infrastructure also reduce range anxiety and total ownership costs.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, due to rising environmental awareness, demand for sustainable urban mobility, and the influence of successful APAC models. North American consumers are increasingly drawn to the affordability, efficiency, and low maintenance of electric scooters and bikes. Additionally, advancements in battery technology and the growing popularity of shared mobility services are accelerating adoption, inspired by Asia-Pacific's innovative and scalable EV ecosystem.

Key players in the market

Some of the key players in Asia Pacific Electric Two-Wheeler Market include Yadea Group Holdings Ltd., Hero Electric, Ultraviolette Automotive, Ather Energy, Emflux Motors, Okinawa Autotech, Super Soco, TVS Motor Company, Revolt Motors, NIU Technologies, Ampere Vehicles, Bajaj Auto, Terra Motors, Gogoro Inc., and Vmoto Soco.

Key Developments:

In October 2024, Ultraviolette (UV), an electric vehicle platform and battery technology company, expands its store footprint to six cities in India, including Chennai, Mumbai, Delhi, Mangaluru, Surat, and Coimbatore by the end of this year. This expansion is part of the EV start-up's goal to reach 25 cities. Ultraviolette has a presence in six Indian cities which include, Pune, Kochi, Hyderabad, Ahmedabad, Vizag, and Bengaluru.

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In May 2024, TVS Motor Company (TVSM) has launched its operations in Italy. The company will introduce a selection of its advanced, high-quality thermic and electric scooters and motorcycles. TVS Motor, ranked as the world's fourth-largest two and three-wheeler manufacturer and third in market capitalization, already markets its products in 80 countries.

Vehicle Types Covered:

- Electric Scooters
- Electric Motorcycles
- Electric Mopeds
- E-Bikes

Propulsion Types Covered:

- Battery Electric Vehicles (BEVs)
- Hybrid Electric Vehicles (HEVs)

Battery Types Covered:

- Lithium-Ion Batteries
- Lead-Acid Batteries
- Nickel-Metal Hydride Batteries
- Other Battery Types

Voltage Capacities Covered:

- Below 48V

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48V to 72V

Above 72V

Battery Capacities Covered:

25–50 Ah

> 50 Ah

Technologies Covered:

Plug-In

Battery Swap

End Users Covered:

Personal Use

Commercial Use

Government & Public Sector

Other End Users

Regions Covered:

North America

US

Canada

Mexico

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- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile

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Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

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Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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