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Electric Two-Wheeler Market Forecasts to 2032 – Global Analysis By Vehicle Type (Electric Scooters, Electric Mopeds, High-Speed vs Low-Speed E2Ws, Performance E-Two-Wheelers and Other Vehicle Types), Battery Type, Connectivity Feature, Drive, End User, and By Geography.

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Abstracts

According to Stratistics MRC, the Global Electric Two-Wheeler Market is accounted for $22.6 billion in 2025 and is expected to reach $46.9 billion by 2032 growing at a CAGR of 11% during the forecast period. An electric two-wheeler is a compact, eco-friendly vehicle powered by an electric motor and rechargeable battery, replacing traditional internal combustion engines. Designed for urban commuting, examples include scooters, motorcycles, and mopeds that deliver zero tailpipe emissions, reduced operating costs, and quieter rides. Modern models integrate advanced features such as regenerative braking, mobile app connectivity, GPS tracking, and swappable battery systems, enhancing convenience and efficiency. By offering sustainable, smart mobility solutions, electric two-wheelers are increasingly vital for addressing congestion and pollution in dense urban regions.

Market Dynamics:

Driver:

Urban congestion and last-mile demand

Urban congestion and the growing need for efficient last-mile connectivity are driving adoption of electric two-wheelers. Compact, agile, and cost-effective, they offer a

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practical solution for navigating crowded city streets. With rising demand for sustainable mobility, electric scooters and motorcycles reduce travel time, emissions, and operating costs. Delivery services, ride-sharing platforms, and commuters increasingly prefer these vehicles, positioning them as essential tools for addressing urban transport challenges while supporting government initiatives to reduce pollution and traffic density.

Restraint:

Battery performance and range anxiety

Battery performance limitations and range anxiety remain significant restraints in the electric two-wheeler market. Consumers often hesitate due to concerns about limited travel distance, charging availability, and battery degradation over time. Current battery technologies struggle to balance affordability, durability, and fast-charging capabilities. These issues hinder widespread adoption, particularly in regions with underdeveloped charging infrastructure. Without breakthroughs in energy density, thermal management, and cost reduction, range anxiety will continue to slow consumer confidence and restrict market penetration in urban and rural areas.

Opportunity:

Connected vehicle platforms and apps

Connected vehicle platforms and mobile applications present a major opportunity for electric two-wheelers. Features such as GPS navigation, remote diagnostics, battery health monitoring, and ride-sharing integration enhance user convenience and safety. These digital ecosystems enable manufacturers to differentiate products, build customer loyalty, and create recurring revenue streams through subscription services. As smart mobility ecosystems expand, connected platforms will transform electric two-wheelers into intelligent devices, aligning with consumer expectations for seamless digital experiences and supporting the broader vision of smart cities.

Threat:

Rising competition from Chinese imports

Rising competition from low-cost Chinese imports poses a critical threat to domestic electric two-wheeler manufacturers. Chinese OEMs leverage economies of scale,

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aggressive pricing, and rapid innovation cycles to capture market share globally. Their entry often undercuts local players, pressuring margins and challenging brand loyalty. Additionally, concerns over quality and safety standards may affect consumer trust, but affordability drives adoption. Without strong differentiation, local firms risk losing ground, making strategic alliances, government support, and innovation essential to withstand competitive pressures.

Covid-19 Impact:

The pandemic initially suppressed sales due to lockdowns and supply chain disruptions, but electric two-wheelers rebounded quickly as demand for personal, low-cost, and contactless mobility surged. Delivery services and gig workers drove adoption, while government stimulus and FAME incentives supported recovery. Rising fuel prices and health concerns further accelerated the shift from public transport to electric scooters and motorcycles. COVID-19 ultimately catalyzed consumer awareness and policy support for sustainable urban mobility, strengthening the market's long-term trajectory.

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

The electric scooters segment is expected to account for the largest market share during the forecast period, due to their affordability, ease of use, and suitability for urban commuting. Their compact design, low maintenance, and growing availability of charging infrastructure make them ideal for short-distance travel. Governments promoting clean mobility and rising fuel costs further accelerate adoption. With expanding product portfolios from key OEMs and increasing consumer awareness, electric scooters are becoming the preferred choice across both developed and emerging markets.

The lithium-ion segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the lithium-ion segment is predicted to witness the highest growth rate, driven by its superior energy density, lightweight profile, and longer lifecycle compared to alternatives. These batteries enable extended range and faster charging, critical for consumer satisfaction and operational efficiency. As costs decline and safety improves, lithium-ion technology is increasingly favored in electric two-wheelers. OEMs are investing in advanced BMS and thermal management systems, reinforcing lithium-ion's role as the backbone of next-gen electric mobility.

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Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, fueled by high population density, urbanization, and strong government incentives in countries like China, India, and Indonesia. Local manufacturers offer cost-effective models tailored to regional needs, while infrastructure development supports widespread adoption. The region's dominance is further reinforced by favorable policies, rising environmental awareness, and growing demand for last-mile connectivity. Asia Pacific remains the manufacturing and consumption hub for electric two-wheelers globally.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by increasing environmental regulations, consumer preference for sustainable transport, and expanding urban micro-mobility networks. Federal and state-level incentives, combined with rising fuel prices and congestion concerns, are pushing consumers toward electric two-wheelers. The region also benefits from technological innovation, premium product offerings, and growing interest in recreational and performance e-bikes. Strategic partnerships and infrastructure investments are accelerating market penetration across urban and suburban areas.

Key players in the market

Some of the key players in Electric Two-Wheeler Market include Yadea Group Holdings, Hero MotoCorp, Revolt Motors, Simple Energy, Ola Electric, Jiangsu Xinri, Yamaha Motor Co., Ltd., Harley-Davidson, Suzuki Motor Corporation, Gogoro Inc., Vmoto Soco, Piaggio & C. SpA, Bajaj Auto Ltd., TVS Motor Company, Ather Energy, and Okinawa Autotech.

Key Developments:

In November 2025, Yamaha launched two new electric scooters in India, the AEROX E and EC-06, developed both in-house and with River Mobility, strengthening its EV portfolio and expanding presence in India's fast-growing electric mobility sector.

In September 2025, Harley-Davidson introduced the 440cc model in India, expanding its premium portfolio with a blend of EV and ICE offerings, targeting aspirational riders and strengthening its foothold in emerging markets.

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In September 2025, SUNRA showcased its Dream 7 electric scooter at the Chongqing Motorcycle Expo, reinforcing its dominance in China's EV two-wheeler market with advanced design, improved battery efficiency, and smart connectivity features tailored for urban mobility.

Vehicle Types Covered:

- Electric Scooters
- Electric Mopeds
- High-Speed vs Low-Speed E2Ws
- Performance E-Two-Wheelers
- Other Vehicle Types

Battery Types Covered:

- Li-Ion
- LFP
- NMC
- Lead-Acid
- Other Battery Types

Connectivity Features Covered:

- Sensors
- Probes and Analyzers
- Software and Services

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Drives Covered:

- Hub Motor Drive
- Mid-Drive Motor
- Chain Drive
- Belt Drive

End Users Covered:

- Individual Consumers
- Commercial Delivery Fleets
- Shared Mobility Operators
- Retailers & Dealerships
- Government Bodies

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany

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- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

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- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

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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

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

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Competitive Benchmarking

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

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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