

Brazil Two Wheeler Market, By Vehicle Type (Motorcycle, Scooter/Moped), By Propulsion (ICE, Electric), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

Brazil Two Wheeler market was valued at USD 2.36 billion in 2024 and is anticipated to grow USD 2.91 billion by 2030 with a CAGR of 3.60% during the forecast period. The Brazil two-wheeler market is experiencing steady growth, fueled by urbanization, rising traffic congestion, and the demand for cost-effective personal mobility solutions. Motorcycles and scooters are increasingly favored for their fuel efficiency, affordability, and ease of navigation through crowded city streets. The expanding gig economy and e-commerce boom have also contributed to rising demand for two-wheelers in delivery and logistics services. Additionally, the younger population is showing growing interest in two-wheelers due to lifestyle preferences and lower ownership costs compared to cars. Motorcycle sales increased by 11.4% year-on-year in early 2025, with scooter sales rising 10%, while year-to-date sales reached 847.145 units by May up 10.9% highlighting strong consumer demand and driving market growth.

Key Market Drivers

Increasing Urban Congestion and Traffic Challenges

Urban congestion remains one of the key drivers of Brazil's two-wheeler market, particularly in densely populated cities such as S?o Paulo, Rio de Janeiro, and Belo Horizonte. Rapid urbanization over recent decades has led to a surge in vehicle ownership, resulting in severe traffic bottlenecks that hinder daily commuting.

Traditional four-wheeled vehicles are increasingly inefficient for urban travel, prompting commuters to seek more agile and time-saving alternatives.

In this context, motorcycles and scooters have emerged as practical mobility solutions. Their ability to weave through congested streets enables faster travel and greater flexibility, especially in areas with underdeveloped public transportation systems. This has made two-wheelers particularly appealing to urban commuters and delivery service providers. According to data from November 2023, the Traffic Congestion Index in S?o Paulo recorded a value of 30.08, slightly above the long-term average of 26.74 measured between January 2019 and November 2023. Despite daily fluctuations, such consistently high congestion levels underline the persistent challenges faced by urban commuters. With S?o Paulo alone witnessing daily traffic delays and vehicle growth adding to the pressure, motorcycles and scooters are increasingly viewed as essential tools for efficient urban mobility.

Key Market Challenges

Safety Concerns and High Accident Rates

One of the most pressing challenges confronting the two-wheeler market in Brazil is the high rate of road accidents involving motorcycles. Despite being an affordable and convenient transportation option, motorcycles expose riders to significantly higher risks compared to four-wheeled vehicles. According to data from Brazil's Ministry of Health and national traffic safety agencies, motorcyclists represent a large proportion of traffic fatalities in the country. The lack of adequate road infrastructure, poor driver education, and non-compliance with traffic laws further exacerbate this issue. Many motorcyclists, especially delivery drivers working under time pressure, engage in risky driving behaviors such as weaving through traffic or speeding. This not only endangers their lives but also creates a perception that motorcycles are unsafe, deterring some potential buyers. The government has made efforts to promote road safety through awareness campaigns and stricter helmet and licensing regulations. However, unless accident rates are significantly reduced, safety concerns will continue to pose a major challenge to market growth and consumer confidence.

Key Market Trends

Growing Adoption of Two-Wheelers for Delivery and Commercial Use

A significant trend reshaping the Brazilian two-wheeler market is the increasing use of

motorcycles and scooters for commercial applications, particularly in the delivery and logistics sectors. With the rapid expansion of e-commerce, online food delivery, and on-demand services, companies are increasingly relying on motorcycles for last-mile delivery due to their affordability, fuel efficiency, and ability to navigate through traffic quickly. Platforms like iFood, Rappi, Uber Eats, and Mercado Livre have created a surge in demand for delivery riders or “motoboys,” who primarily use two-wheelers for their operations. This trend accelerated during the COVID-19 pandemic, as businesses pivoted to digital channels and consumers turned to online ordering. Even post-pandemic, the habit of ordering groceries, meals, and retail products online continues to grow, driving the need for fast, reliable delivery networks. Consequently, manufacturers are introducing commercial-grade models and offering fleet solutions tailored for delivery services, including features like extra storage and reinforced suspension systems. This ongoing trend is expected to sustain high demand for two-wheelers in urban centers.

Key Market Players

Moto Honda da Amaz?nia, Ltda.

Triumph Motorcycles Ltd.

Harley Davidson Inc.

Yamaha Motor do Brasil Ltda.

Shineray Do Brasil SA

Bajaj Auto Limited

Dafra Motos

Suzuki Motor Corp.

Bayerische Motoren Werke AG

Kawasaki Motors Corp.

Report Scope:

Brazil Two Wheeler Market, By Vehicle Type (Motorcycle, Scooter/Moped), By Propulsion (ICE, Electric), By Regi...

In this report, the Brazil Two Wheeler Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Brazil Two Wheeler Market, By Vehicle Type:

Motorcycle

Scooter/Moped

Brazil Two Wheeler Market, By Propulsion:

ICE

Electric

Brazil Two Wheeler Market, By Region:

North Region

South Region

East Region

West Region

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Brazil Two Wheeler Market.

Available Customizations:

Brazil Two Wheeler Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Brazil Two Wheeler Market, By Vehicle Type (Motorcycle, Scooter/Moped), By Propulsion (ICE, Electric), By Regi...

Detailed analysis and profiling of additional market players (up to five).

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