

Electric Two-Wheeler Components Market – Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By Vehicle Type (Motorcycle, Scooter), By Demand Category (OEM, Aftermarket), By Component Type (Battery Packs, DC-DC Converter, Controller & Inverter, Motor, On-Board Chargers, and Other), By Region, Competition, 2018-2028

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Abstracts

The Global Electric Two-Wheeler Components Market size reached USD 43.81 billion in 2022 and is expected to grow with a CAGR of 7.71% in the forecast period.

The Global Electric Two-Wheeler Components Market is experiencing a remarkable transformation as the world embraces electric mobility solutions. This market encompasses a wide range of components and systems crucial for the functioning of electric bicycles (e-bikes) and electric scooters, both of which are gaining widespread popularity in urban and suburban environments.

One of the primary drivers behind the growth of this market is the increasing awareness of environmental sustainability and the need for cleaner modes of transportation. E-bikes and electric scooters are seen as eco-friendly alternatives to traditional gasoline-powered vehicles, offering reduced emissions and air pollution. Governments in various regions are incentivizing their adoption by providing subsidies, tax benefits, and investing in cycling infrastructure, further fueling the demand for electric two-wheeler components.

Advancements in battery technology play a pivotal role in reshaping the electric two-wheeler components market. Lithium-ion batteries, with improved energy density and

charging capabilities, are empowering e-bikes and electric scooters to achieve longer ranges and offer enhanced performance. Battery management systems (BMS) are evolving to ensure the safety and longevity of these batteries, bolstering consumer confidence in the technology.

The urbanization trend, particularly in densely populated cities, is accelerating the adoption of electric two-wheelers. E-bikes and electric scooters are well-suited for navigating congested streets, reducing traffic congestion, and providing a convenient last-mile transportation solution. Micromobility services, including e-scooter sharing programs, are becoming integral to urban transportation ecosystems, stimulating the demand for electric two-wheeler components. The market also witnesses innovations in electric powertrains and motor technology tailored to the unique requirements of e-bikes and electric scooters. These components are designed for efficiency, lightweight construction, and reliability, contributing to the overall performance and appeal of electric two-wheelers.

Furthermore, the COVID-19 pandemic has accelerated the adoption of personal electric transportation, as people seek safer and socially distanced commuting options. E-bikes and electric scooters offer a practical means of transportation while adhering to health guidelines, further bolstering their market presence.

In conclusion, the Global Electric Two-Wheeler Components Market is undergoing rapid expansion driven by environmental concerns, technological advancements in batteries and components, urbanization, and changing mobility preferences. As cities strive for sustainable transportation solutions and consumers embrace electric two-wheelers for their convenience and eco-friendliness, this market is poised to play a pivotal role in shaping the future of urban mobility.

Key Market Drivers

Environmental Sustainability

One of the primary drivers is the global commitment to environmental sustainability. The transportation sector is a major contributor to carbon emissions, and electric two-wheelers provide an eco-friendly alternative. Governments and consumers alike are increasingly opting for e-bikes and electric scooters as clean and green modes of personal transportation, reducing their carbon footprint.

Urbanization and Congestion

Rapid urbanization has led to increased traffic congestion and pollution in cities. E-bikes and electric scooters are well-suited for urban environments, offering efficient mobility solutions to navigate through traffic, reduce commute times, and minimize congestion. This driver is particularly pronounced in densely populated urban areas.

Government Incentives

Many governments around the world are incentivizing the adoption of electric two-wheelers. These incentives include subsidies, tax benefits, and dedicated funding for cycling infrastructure. Such government support encourages consumers to invest in e-bikes and electric scooters, making them more accessible and affordable.

Battery Technology Advancements

Advances in battery technology, especially lithium-ion batteries, have extended the range and improved the performance of e-bikes and electric scooters. High-capacity batteries with faster charging capabilities have become a key driver, addressing one of the critical concerns of electric mobility: range anxiety.

Micromobility Services

The rise of micro mobility services, including e-scooter sharing programs, has bolstered the adoption of electric scooters. These services offer convenient and cost-effective transportation options for short trips within cities, reducing the need for personal vehicles and promoting electric scooter use.

Health and Fitness Trends

E-bikes have gained popularity as they allow riders to combine exercise with commuting. Health-conscious consumers are attracted to e-bikes as a way to stay active while reducing their reliance on cars. This driver has contributed to the e-bike's appeal among a broad demographic.

Pandemic-Induced Shifts

The COVID-19 pandemic accelerated the adoption of personal electric transportation. As people sought safer and socially distanced commuting options, e-bikes and electric scooters emerged as practical solutions. This shift in consumer behavior has led to

increased demand for these vehicles.

Technological Innovation

Continuous technological innovation in electric powertrains, motors, and components has improved the overall performance, reliability, and user experience of e-bikes and electric scooters. Smarter and more efficient components, including regenerative braking systems and integrated navigation, are driving consumer interest in these vehicles.

In summary, the Global Electric Two-Wheeler Components Market is thriving due to a combination of environmental awareness, urbanization challenges, government incentives, battery advancements, micro mobility services, health trends, pandemic-induced shifts, and ongoing technological innovation. These drivers collectively underscore the growing importance of electric two-wheelers in reshaping urban mobility and promoting sustainable transportation solutions.

Key Market Challenges

Range Limitations

Range anxiety remains a significant challenge, particularly for e-bikes and electric scooters. Despite advancements in battery technology, consumers worry about running out of charge during longer journeys, which can limit the widespread adoption of these vehicles.

Charging Infrastructure

The availability and accessibility of charging infrastructure are crucial for electric two-wheelers. While urban areas may have a growing network of charging stations, rural and less developed regions often lack adequate infrastructure, hindering the convenience and adoption of electric two-wheelers.

Battery Costs

The cost of lithium-ion batteries, a vital component of electric two-wheelers, remains relatively high. Reducing battery costs is essential to make these vehicles more affordable and competitive with their gasoline-powered counterparts.

Safety Concerns

Ensuring the safety of electric two-wheeler users is a significant challenge. This includes addressing concerns related to battery safety, crash safety standards, and rider protection. Governments and manufacturers need to work together to establish robust safety regulations and promote safety awareness.

Regulatory Hurdles

Regulatory frameworks for electric two-wheelers can vary widely from region to region, creating complexities for manufacturers and consumers. Harmonizing regulations and ensuring consistent standards globally is a challenge to streamline market growth.

Infrastructure Congestion

In urban areas, the proliferation of electric two-wheelers, particularly e-scooters, can lead to infrastructure congestion. Finding ways to manage parking, charging, and the sheer number of vehicles on the road poses challenges for city planners and policymakers.

Market Fragmentation

The electric two-wheeler market is highly fragmented, with numerous manufacturers producing a wide range of vehicles and components. This fragmentation can lead to interoperability issues and challenges in standardizing components across different brands and models.

Customer Education

Educating consumers about the benefits and maintenance of electric two-wheelers is an ongoing challenge. Many potential buyers are unfamiliar with the technology, which can lead to misconceptions and hesitations about adopting electric two-wheelers. Effective marketing and educational campaigns are essential to address this challenge.

Addressing these challenges requires collaborative efforts from governments, manufacturers, and infrastructure providers to enhance the appeal and viability of electric two-wheelers as a sustainable and efficient mode of transportation.

Key Market Trends

Battery Advancements

Advances in battery technology are a prevailing trend. Lithium-ion batteries are becoming more energy-dense, offering longer ranges and faster charging times for e-bikes and electric scooters. Innovations like solid-state batteries and improved battery management systems are enhancing performance and reliability.

Urban Mobility Solutions

Electric two-wheelers are gaining traction as urban mobility solutions. They offer an efficient and eco-friendly means of navigating congested cities and addressing last-mile transportation needs, reducing traffic congestion and pollution.

Micromobility Services

Micromobility services, including e-scooter sharing programs, continue to expand in urban areas. These services provide convenient, short-distance transportation options, making electric scooters a crucial trend in shared mobility and reducing the reliance on personal vehicles.

Smart Connectivity

Smart connectivity features are increasingly integrated into electric two-wheelers. This includes smartphone apps for navigation, vehicle diagnostics, and remote monitoring of battery status. Such features enhance the user experience and connectivity of electric two-wheelers.

Lightweight Materials

Lightweight materials like carbon fiber and aluminum are being used to reduce the weight of e-bikes and scooters. This trend improves energy efficiency and range while ensuring the vehicles remain maneuverable and user-friendly.

Customization and Personalization

Manufacturers are offering customization options for electric two-wheelers, allowing consumers to personalize their vehicles with various accessories, colors, and features. This trend caters to diverse consumer preferences and needs.

Regulatory Support

Governments are increasingly supportive of electric two-wheelers through regulatory measures. Incentives such as subsidies, tax breaks, and reduced registration fees are making e-bikes and electric scooters more accessible to a broader range of consumers.

Global Supply Chain Optimization

To meet the growing demand for electric two-wheelers, manufacturers are optimizing their global supply chains. This trend includes expanding production facilities, securing critical components, and streamlining distribution networks to ensure efficient delivery to markets worldwide.

These trends collectively underscore the growing importance of electric two-wheelers in addressing urban mobility challenges, reducing emissions, and providing consumers with efficient, eco-friendly, and technologically advanced transportation options. As the market continues to evolve, these trends are expected to shape the landscape of electric two-wheeler components and vehicles in the years to come.

Segmental Insights

By Vehicle Type

E-bikes represent a substantial and rapidly growing segment in the Electric Two-Wheeler Components Market. These electric bicycles are equipped with components such as electric motors, batteries, controllers, and sensors to augment pedaling efforts or provide full electric propulsion. E-bikes cater to a diverse range of consumers, including daily commuters seeking an efficient and eco-friendly mode of transportation, recreational riders looking for extended range and ease of use, and delivery services relying on them for cost-effective and efficient deliveries.

Electric scooters are another prominent category within the market. Electric scooter components encompass electric motors, batteries, brakes, and electronic control systems. They have gained popularity in urban environments, particularly through micro mobility sharing services. Electric scooters provide a convenient, last-mile transportation solution for urban commuters, reducing traffic congestion and carbon emissions. The compact design and intuitive controls of these vehicles make them appealing to a wide range of riders.

The Electric Two-Wheeler Components Market also includes electric motorcycles and kick scooters. Electric motorcycles are gaining traction, especially in the performance and enthusiast segments, and their components include high-powered electric motors, advanced battery systems, and cutting-edge electronics for improved performance and safety. Kick scooters, on the other hand, are often favored by children and recreational users, featuring compact electric motors and lightweight components for ease of use.

Each of these vehicle types represents unique market segments with varying component requirements, performance characteristics, and target demographics. As urban mobility continues to evolve, these segments are expected to further diversify and drive innovation in electric two-wheeler components.

By Demand Category

Consumer e-bikes, primarily used for personal transportation and recreation, form a significant portion of the market. These e-bikes are equipped with components that cater to everyday commuters, recreational riders, and outdoor enthusiasts. Components such as mid-drive motors, integrated battery systems, user-friendly controls, and comfortable seating are essential to enhance the riding experience. Consumer e-bikes are sought after for their ability to provide a smooth and efficient mode of transportation, making them an ideal choice for urban commuters and individuals looking for an eco-friendly and enjoyable way to explore their surroundings.

Commercial e-bikes are a specialized category designed for business and delivery purposes. These e-bikes are equipped with components that optimize cargo-carrying capacity, durability, and efficiency. Cargo e-bikes, for instance, feature robust frames, large cargo platforms, and high-capacity battery systems to accommodate goods for delivery services. Components like heavy-duty motors, advanced braking systems, and cargo-specific accessories cater to the demands of commercial use. As the e-commerce and food delivery industries grow, commercial e-bikes play a pivotal role in reducing delivery times and emissions in urban areas.

E-scooters designed for shared mobility services are reshaping urban transportation and fall within the Demand Category segment. These electric scooters are built for durability, ease of use, and affordability, with components such as durable frames, swappable battery systems, intuitive controls, and robust connectivity features. Shared mobility providers rely on these components to ensure the reliability and accessibility of their fleets, offering riders a convenient and sustainable alternative to traditional

transportation modes. The rapid proliferation of e-scooter sharing programs in urban areas underscores the importance of tailored components for this category.

The Demand Category segment reflects the diverse applications and preferences within the Electric Two-Wheeler Components Market. Components are customized to meet the specific requirements of consumers, businesses, shared mobility providers, and specialized users, driving innovation and expansion within the market.

By Component Type

Electric motors are at the heart of e-bikes and electric scooters, providing the necessary propulsion. Component variations include hub motors (located in the wheel hub), mid-drive motors (integrated into the bike's frame), and power ratings that determine acceleration and top speed. Innovations in motor efficiency and torque delivery are enhancing the riding experience, enabling greater ranges, and supporting diverse vehicle types.

Batteries are critical components that store and provide electrical energy to e-bikes and electric scooters. Lithium-ion batteries, with varying capacities, are commonly used to offer the required range. Battery management systems (BMS) ensure safe operation and extend battery life. Advances in battery technology focus on energy density, charging speed, and cost reduction to address the key challenges of range and affordability.

Controllers serve as the brains of electric two-wheelers, regulating the flow of power from the battery to the motor. These components manage speed, assist levels, and often include user interfaces, such as displays and buttons. Connectivity features are becoming more prevalent, enabling riders to customize settings and access data via smartphone apps.

Braking systems are crucial for rider safety. Disc brakes and regenerative braking systems are common in electric two-wheelers. Regenerative braking converts kinetic energy back into electrical energy to recharge the battery, enhancing overall efficiency. Advanced braking systems with electronic stability control and anti-lock features are becoming more prevalent.

Frames and chassis components determine the structural integrity, weight, and durability of e-bikes and electric scooters. Lightweight materials like aluminum and carbon fiber are increasingly used to reduce weight without compromising strength.

Frame design also plays a role in accommodating batteries and motor systems, optimizing weight distribution and ride quality.

Suspension systems, including front forks and rear shock absorbers, are vital for ride comfort and handling, particularly in electric mountain bikes and off-road scooters. These components help absorb shocks, maintain traction, and enhance stability on various terrains.

Wheels and tires are integral to ride quality and performance. Components such as alloy rims, high-performance tires, and tubeless systems contribute to reduced rolling resistance, improved grip, and overall efficiency.

Accessories encompass a wide range of optional components, including lighting systems, fenders, racks, and ergonomic grips. These extras enhance safety, convenience, and utility for riders, catering to various preferences and intended uses.

The Component Type segment highlights the diverse elements that collectively shape the functionality, performance, and user experience of electric two-wheelers. Ongoing innovations and customization within each component category drive the market's evolution and the continued growth of electric mobility solutions.

Regional Insights

Latin America is gradually embracing electric two-wheelers and their components. Economic challenges and limited charging infrastructure have slowed the adoption rate, but countries like Brazil and Mexico are witnessing increased interest. Government incentives, including tax breaks and subsidies, aim to stimulate e-bike and electric scooter adoption, spurring local component production. As Latin America addresses these challenges and aligns with environmental goals, it has the potential for significant market growth, particularly in urban centers where clean transportation is a pressing concern.

The Middle East and Africa are in the early stages of incorporating electric two-wheelers and components into their transportation landscape. Some countries, such as the United Arab Emirates, have initiated efforts to promote e-bike and electric scooter adoption and establish charging infrastructure. The region's predominantly fossil fuel-based energy sources pose challenges, but shifting energy policies and international collaborations are gradually shaping the market. As governments diversify their energy mix and reduce emissions, the market for electric two-wheeler components is expected

to grow, especially in urban areas where sustainable transportation is a priority.

In summary, regional insights highlight the varying dynamics of the Electric Two-Wheeler Components Market shaped by regulatory environments, infrastructure development, consumer preferences, and economic conditions. Each region plays a unique role in driving the global transition toward sustainable and efficient electric mobility solutions, contributing to the ongoing evolution of the market.

Key Market Players

Continental AG

Robert Bosch GmbH

Denso Corporation

Hella GmbH & Co. KGaA

Toyota Industries Corporation

Hyundai Mobis

Samsung SDI Co Ltd

Panasonic Corporation

Contemporary Amperex Technology Co. Ltd.,

BorgWarner Inc

Report Scope:

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

Electric Two-Wheeler Components Market, By Vehicle Type:

Motorcycle

Scooter

Electric Two-Wheeler Components Market, By Demand Category:

OEM

Aftermarket

Electric Two-Wheeler Components Market, By Component Type:

Battery Packs

DC-DC Converter

Controller & Inverter

Motor

On-Board Chargers

Others

Electric Two-Wheeler Components Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Electric Two-Wheeler Components Market.

Available Customizations:

Global Electric Two-Wheeler Components Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. IMPACT OF COVID-19 ON GLOBAL ELECTRIC TWO-WHEELER COMPONENTS MARKET

5. GLOBAL ELECTRIC TWO-WHEELER COMPONENTS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Volume & Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Vehicle Type Market Share Analysis (Motorcycle, Scooter)
 - 5.2.2. By Demand Category Market Share Analysis (OEM, Aftermarket)
 - 5.2.3. By Component Type Market Share Analysis (Battery Packs, DC-DC Converter,

Controller & Inverter, Motor, On-Board Chargers, and Others)

5.2.4. By Regional Market Share Analysis

5.2.4.1. Asia-Pacific Market Share Analysis

5.2.4.2. Europe & CIS Market Share Analysis

5.2.4.3. North America Market Share Analysis

5.2.4.4. South America Market Share Analysis

5.2.4.5. Middle East & Africa Market Share Analysis

5.2.5. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2022)

5.3. Global Electric Two-Wheeler Components Market Mapping & Opportunity Assessment

5.3.1. By Vehicle Type Market Mapping & Opportunity Assessment

5.3.2. By Demand Category Market Mapping & Opportunity Assessment

5.3.3. By Component Type Market Mapping & Opportunity Assessment

5.3.4. By Regional Market Mapping & Opportunity Assessment

6. ASIA-PACIFIC ELECTRIC TWO-WHEELER COMPONENTS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Volume & Value

6.2. Market Share & Forecast

6.2.1. By Vehicle Type Market Share Analysis

6.2.2. By Demand Category Market Share Analysis

6.2.3. By Component Type Market Share Analysis

6.2.4. By Country Market Share Analysis

6.2.4.1. China Market Share Analysis

6.2.4.2. India Market Share Analysis

6.2.4.3. Japan Market Share Analysis

6.2.4.4. Indonesia Market Share Analysis

6.2.4.5. Thailand Market Share Analysis

6.2.4.6. South Korea Market Share Analysis

6.2.4.7. Australia Market Share Analysis

6.2.4.8. Rest of Asia-Pacific Market Share Analysis

6.3. Asia-Pacific: Country Analysis

6.3.1. China Electric Two-Wheeler Components Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Volume & Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Vehicle Type Market Share Analysis

- 6.3.1.2.2. By Demand Category Market Share Analysis
- 6.3.1.2.3. By Component Type Market Share Analysis
- 6.3.2. India Electric Two-Wheeler Components Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Volume & Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Vehicle Type Market Share Analysis
 - 6.3.2.2.2. By Demand Category Market Share Analysis
 - 6.3.2.2.3. By Component Type Market Share Analysis
- 6.3.3. Japan Electric Two-Wheeler Components Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Volume & Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Vehicle Type Market Share Analysis
 - 6.3.3.2.2. By Demand Category Market Share Analysis
 - 6.3.3.2.3. By Component Type Market Share Analysis
- 6.3.4. Indonesia Electric Two-Wheeler Components Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Volume & Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Vehicle Type Market Share Analysis
 - 6.3.4.2.2. By Demand Category Market Share Analysis
 - 6.3.4.2.3. By Component Type Market Share Analysis
- 6.3.5. Thailand Electric Two-Wheeler Components Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Volume & Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Vehicle Type Market Share Analysis
 - 6.3.5.2.2. By Demand Category Market Share Analysis
 - 6.3.5.2.3. By Component Type Market Share Analysis
- 6.3.6. South Korea Electric Two-Wheeler Components Market Outlook
 - 6.3.6.1. Market Size & Forecast
 - 6.3.6.1.1. By Volume & Value
 - 6.3.6.2. Market Share & Forecast
 - 6.3.6.2.1. By Vehicle Type Market Share Analysis
 - 6.3.6.2.2. By Demand Category Market Share Analysis
 - 6.3.6.2.3. By Component Type Market Share Analysis
- 6.3.7. Australia Electric Two-Wheeler Components Market Outlook
 - 6.3.7.1. Market Size & Forecast

- 6.3.7.1.1. By Volume & Value
- 6.3.7.2. Market Share & Forecast
 - 6.3.7.2.1. By Vehicle Type Market Share Analysis
 - 6.3.7.2.2. By Demand Category Market Share Analysis
 - 6.3.7.2.3. By Component Type Market Share Analysis

7. EUROPE & CIS ELECTRIC TWO-WHEELER COMPONENTS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Volume & Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Vehicle Type Market Share Analysis
 - 7.2.2. By Demand Category Market Share Analysis
 - 7.2.3. By Component Type Market Share Analysis
 - 7.2.4. By Country Market Share Analysis
 - 7.2.4.1. Germany Market Share Analysis
 - 7.2.4.2. Spain Market Share Analysis
 - 7.2.4.3. France Market Share Analysis
 - 7.2.4.4. Russia Market Share Analysis
 - 7.2.4.5. Italy Market Share Analysis
 - 7.2.4.6. United Kingdom Market Share Analysis
 - 7.2.4.7. Belgium Market Share Analysis
 - 7.2.4.8. Rest of Europe & CIS Market Share Analysis
- 7.3. Europe & CIS: Country Analysis
 - 7.3.1. Germany Electric Two-Wheeler Components Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Volume & Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Vehicle Type Market Share Analysis
 - 7.3.1.2.2. By Demand Category Market Share Analysis
 - 7.3.1.2.3. By Component Type Market Share Analysis
 - 7.3.2. Spain Electric Two-Wheeler Components Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Volume & Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Vehicle Type Market Share Analysis
 - 7.3.2.2.2. By Demand Category Market Share Analysis
 - 7.3.2.2.3. By Component Type Market Share Analysis
 - 7.3.3. France Electric Two-Wheeler Components Market Outlook

- 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Volume & Value
- 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Vehicle Type Market Share Analysis
 - 7.3.3.2.2. By Demand Category Market Share Analysis
 - 7.3.3.2.3. By Component Type Market Share Analysis
- 7.3.4. Russia Electric Two-Wheeler Components Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Volume & Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Vehicle Type Market Share Analysis
 - 7.3.4.2.2. By Demand Category Market Share Analysis
 - 7.3.4.2.3. By Component Type Market Share Analysis
- 7.3.5. Italy Electric Two-Wheeler Components Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Volume & Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Vehicle Type Market Share Analysis
 - 7.3.5.2.2. By Demand Category Market Share Analysis
 - 7.3.5.2.3. By Component Type Market Share Analysis
- 7.3.6. United Kingdom Electric Two-Wheeler Components Market Outlook
 - 7.3.6.1. Market Size & Forecast
 - 7.3.6.1.1. By Volume & Value
 - 7.3.6.2. Market Share & Forecast
 - 7.3.6.2.1. By Vehicle Type Market Share Analysis
 - 7.3.6.2.2. By Demand Category Market Share Analysis
 - 7.3.6.2.3. By Component Type Market Share Analysis
- 7.3.7. Belgium Electric Two-Wheeler Components Market Outlook
 - 7.3.7.1. Market Size & Forecast
 - 7.3.7.1.1. By Volume & Value
 - 7.3.7.2. Market Share & Forecast
 - 7.3.7.2.1. By Vehicle Type Market Share Analysis
 - 7.3.7.2.2. By Demand Category Market Share Analysis
 - 7.3.7.2.3. By Component Type Market Share Analysis

8. NORTH AMERICA ELECTRIC TWO-WHEELER COMPONENTS MARKET OUTLOOK

8.1. Market Size & Forecast

- 8.1.1. By Volume & Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Vehicle Type Market Share Analysis
 - 8.2.2. By Demand Category Market Share Analysis
 - 8.2.3. By Component Type Market Share Analysis
 - 8.2.4. By Country Market Share Analysis
 - 8.2.4.1. United States Market Share Analysis
 - 8.2.4.2. Mexico Market Share Analysis
 - 8.2.4.3. Canada Market Share Analysis
- 8.3. North America: Country Analysis
 - 8.3.1. United States Electric Two-Wheeler Components Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Volume & Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Vehicle Type Market Share Analysis
 - 8.3.1.2.2. By Demand Category Market Share Analysis
 - 8.3.1.2.3. By Component Type Market Share Analysis
 - 8.3.2. Mexico Electric Two-Wheeler Components Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Volume & Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Vehicle Type Market Share Analysis
 - 8.3.2.2.2. By Demand Category Market Share Analysis
 - 8.3.2.2.3. By Component Type Market Share Analysis
 - 8.3.3. Canada Electric Two-Wheeler Components Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Volume & Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Vehicle Type Market Share Analysis
 - 8.3.3.2.2. By Demand Category Market Share Analysis
 - 8.3.3.2.3. By Component Type Market Share Analysis

9. SOUTH AMERICA ELECTRIC TWO-WHEELER COMPONENTS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Volume & Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Vehicle Type Market Share Analysis

- 9.2.2. By Demand Category Market Share Analysis
- 9.2.3. By Component Type Market Share Analysis
- 9.2.4. By Country Market Share Analysis
 - 9.2.4.1. Brazil Market Share Analysis
 - 9.2.4.2. Argentina Market Share Analysis
 - 9.2.4.3. Colombia Market Share Analysis
 - 9.2.4.4. Rest of South America Market Share Analysis
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Electric Two-Wheeler Components Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Volume & Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Vehicle Type Market Share Analysis
 - 9.3.1.2.2. By Demand Category Market Share Analysis
 - 9.3.1.2.3. By Component Type Market Share Analysis
 - 9.3.2. Colombia Electric Two-Wheeler Components Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Volume & Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Vehicle Type Market Share Analysis
 - 9.3.2.2.2. By Demand Category Market Share Analysis
 - 9.3.2.2.3. By Component Type Market Share Analysis
 - 9.3.3. Argentina Electric Two-Wheeler Components Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Volume & Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Vehicle Type Market Share Analysis
 - 9.3.3.2.2. By Demand Category Market Share Analysis
 - 9.3.3.2.3. By Component Type Market Share Analysis

10. MIDDLE EAST & AFRICA ELECTRIC TWO-WHEELER COMPONENTS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Volume & Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Vehicle Type Market Share Analysis
 - 10.2.2. By Demand Category Market Share Analysis
 - 10.2.3. By Component Type Market Share Analysis

- 10.2.4. By Country Market Share Analysis
 - 10.2.4.1. Turkey Market Share Analysis
 - 10.2.4.2. Iran Market Share Analysis
 - 10.2.4.3. Saudi Arabia Market Share Analysis
 - 10.2.4.4. UAE Market Share Analysis
 - 10.2.4.5. Rest of Middle East & Africa Market Share Africa
- 10.3. Middle East & Africa: Country Analysis
 - 10.3.1. Turkey Electric Two-Wheeler Components Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Volume & Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Vehicle Type Market Share Analysis
 - 10.3.1.2.2. By Demand Category Market Share Analysis
 - 10.3.1.2.3. By Component Type Market Share Analysis
 - 10.3.2. Iran Electric Two-Wheeler Components Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Volume & Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Vehicle Type Market Share Analysis
 - 10.3.2.2.2. By Demand Category Market Share Analysis
 - 10.3.2.2.3. By Component Type Market Share Analysis
 - 10.3.3. Saudi Arabia Electric Two-Wheeler Components Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Volume & Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Vehicle Type Market Share Analysis
 - 10.3.3.2.2. By Demand Category Market Share Analysis
 - 10.3.3.2.3. By Component Type Market Share Analysis
 - 10.3.4. UAE Electric Two-Wheeler Components Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Volume & Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Vehicle Type Market Share Analysis
 - 10.3.4.2.2. By Demand Category Market Share Analysis
 - 10.3.4.2.3. By Component Type Market Share Analysis

11. SWOT ANALYSIS

11.1. Strength

- 11.2. Weakness
- 11.3. Opportunities
- 11.4. Threats

12. MARKET DYNAMICS

- 12.1. Market Drivers
- 12.2. Market Challenges

13. MARKET TRENDS AND DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

- 14.1. Company Profiles (Up to 10 Major Companies)
 - 14.1.1. Continental AG
 - 14.1.1.1. Company Details
 - 14.1.1.2. Key Product Offered
 - 14.1.1.3. Financials (As Per Availability)
 - 14.1.1.4. Recent Developments
 - 14.1.1.5. Key Management Personnel
 - 14.1.2. Robert Bosch GmbH
 - 14.1.2.1. Company Details
 - 14.1.2.2. Key Product Offered
 - 14.1.2.3. Financials (As Per Availability)
 - 14.1.2.4. Recent Developments
 - 14.1.2.5. Key Management Personnel
 - 14.1.3. Denso Corporation
 - 14.1.3.1. Company Details
 - 14.1.3.2. Key Product Offered
 - 14.1.3.3. Financials (As Per Availability)
 - 14.1.3.4. Recent Developments
 - 14.1.3.5. Key Management Personnel
 - 14.1.4. Hella GmbH & Co. KGaA
 - 14.1.4.1. Company Details
 - 14.1.4.2. Key Product Offered
 - 14.1.4.3. Financials (As Per Availability)
 - 14.1.4.4. Recent Developments
 - 14.1.4.5. Key Management Personnel

14.1.5. Toyota Industries Corporation

14.1.5.1. Company Details

14.1.5.2. Key Product Offered

14.1.5.3. Financials (As Per Availability)

14.1.5.4. Recent Developments

14.1.5.5. Key Management Personnel

14.1.6. Hyundai Mobis

14.1.6.1. Company Details

14.1.6.2. Key Product Offered

14.1.6.3. Financials (As Per Availability)

14.1.6.4. Recent Developments

14.1.6.5. Key Management Personnel

14.1.7. Samsung SDI Co Ltd

14.1.7.1. Company Details

14.1.7.2. Key Product Offered

14.1.7.3. Financials (As Per Availability)

14.1.7.4. Recent Developments

14.1.7.5. Key Management Personnel

14.1.8. Panasonic Corporation

14.1.8.1. Company Details

14.1.8.2. Key Product Offered

14.1.8.3. Financials (As Per Availability)

14.1.8.4. Recent Developments

14.1.8.5. Key Management Personnel

14.1.9. Contemporary Amperex Technology Co. Ltd.

14.1.9.1. Company Details

14.1.9.2. Key Product Offered

14.1.9.3. Financials (As Per Availability)

14.1.9.4. Recent Developments

14.1.9.5. Key Management Personnel

14.1.10. BorgWarner Inc

14.1.10.1. Company Details

14.1.10.2. Key Product Offered

14.1.10.3. Financials (As Per Availability)

14.1.10.4. Recent Developments

14.1.10.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas

15.1.1. Target Regions

15.1.2. Target Vehicle Type

15.1.3. Target Type

16. ABOUT US & DISCLAIMER

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