

Europe Electric Two-Wheeler Market By Vehicle Type (Scooter/Moped & Motorcycle), By Battery Capacity (25Ah), By Battery Type (Lead Acid, Li-ion, & NiMH), By Country, Competition Forecast & Opportunities, 2018-2028

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Abstracts

The Europe electric two-wheeler market is currently witnessing remarkable growth and undergoing transformative changes. This growth is primarily driven by increasing awareness of environmental concerns and the urgent need for sustainable transportation solutions. With supportive government regulations and incentives, as well as significant advancements in battery technology, the adoption of electric two-wheelers has been further accelerated. These eco-friendly and highly efficient vehicles are gaining immense popularity, especially in urban areas, as they provide a practical and convenient mode of transportation. Moreover, electric two-wheelers effectively address the challenges of congestion and parking, offering a solution that is both efficient and environmentally friendly. In addition to being clean and green modes of transportation, electric two-wheelers also contribute to noise reduction, making them ideal for crowded urban environments. With zero tailpipe emissions, they play a crucial role in improving air quality and reducing carbon footprints. As the market continues to evolve and expand, the European electric two-wheeler segment is poised to play a pivotal role in the region's transition towards cleaner and greener mobility solutions. By promoting sustainable transportation alternatives, these vehicles contribute to a more sustainable and environmentally conscious future. The ongoing advancements and innovations in the electric two-wheeler industry are driving significant improvements in battery range, charging infrastructure, and overall performance, further enhancing the appeal of these vehicles to a wider audience.

Key Market Drivers:

Environmental Awareness and Sustainability:

The rising awareness of environmental issues, such as air pollution and climate change, has prompted consumers and policymakers to seek more sustainable transportation alternatives. Electric two-wheelers offer a cleaner and greener mode of transportation, as they produce zero tailpipe emissions during operation. The environmental benefits of electric two-wheelers appeal to environmentally conscious consumers, making them more inclined to switch from conventional gasoline-powered vehicles to electric options.

Supportive Government Regulations and Incentives:

Many European countries have implemented supportive regulations and incentives to promote the adoption of electric vehicles, including electric two-wheelers. Governments offer various financial incentives such as subsidies, tax benefits, and reduced registration fees for electric two-wheelers, making them more affordable for consumers. Additionally, some cities provide access to dedicated lanes or preferential parking for electric vehicles, encouraging their use and reducing barriers to adoption.

Technological Advancements in Battery Technology:

The development of advanced battery technologies, particularly lithium-ion batteries, has significantly improved the performance and range of electric two-wheelers. These batteries offer higher energy density and longer lifespan, addressing one of the main concerns of potential buyers - range anxiety. With improved battery technology, electric two-wheelers now offer longer riding ranges on a single charge, making them more practical for daily commuting and longer journeys.

Changing Urban Mobility Needs

The increasing urbanization and congestion in major European cities have led to a greater demand for alternative transportation solutions. Electric two-wheelers provide practical and convenient means of commuting in crowded urban areas, where maneuverability and reduced parking hassles are essential. Their compact size and agility make them ideal for navigating through heavy traffic and narrow streets, offering a compelling solution for urban mobility challenges.

Industry Investment and Collaboration

The growing popularity of electric two-wheelers has attracted significant investment and collaboration from both established automotive manufacturers and startups. Major automotive companies are entering the electric two-wheeler market by launching their lines of electric scooters and motorcycles. At the same time, innovative startups are introducing stylish and technologically advanced electric two-wheelers to cater to diverse consumer preferences. This influx of investment and innovation is driving product development and expanding the range of electric two-wheeler options available to consumers.

Key Market Challenges

High Initial Cost

One of the primary challenges for electric two-wheelers is their higher initial cost compared to conventional gasoline-powered vehicles. Electric two-wheelers often have a higher upfront purchase price due to the cost of battery technology and other electric components. This price differential can deter price-sensitive consumers, especially in a market where gasoline-powered two-wheelers are more established and readily available at lower price points.

Limited Range and Charging Infrastructure

Range anxiety is a significant concern for potential buyers of electric two-wheelers. Although advancements in battery technology have improved the range of electric two-wheelers, they still have limited riding distances on a single charge compared to conventional vehicles. Additionally, the availability and accessibility of charging infrastructure are critical factors for widespread electric vehicle adoption. The need for a robust and widespread charging network remains a challenge, particularly in rural or less developed areas.

Charging Time

Another challenge related to charging is the time required to fully charge electric two-wheelers. While gasoline-powered vehicles can be quickly refueled at gas stations, electric two-wheelers may require a few hours to recharge their batteries fully. Charging time can impact the convenience and practicality of electric two-wheelers, especially for consumers who rely on their vehicles for daily commuting or longer journeys.

Battery Recycling and Disposal

The growing popularity of electric vehicles raises concerns about the recycling and disposal of used batteries. Proper recycling and disposal of batteries are essential to minimize their environmental impact. Ensuring a sustainable and efficient battery recycling infrastructure is crucial to address this challenge and promote the eco-friendly aspect of electric two-wheelers.

Consumer Awareness and Education

Despite increasing environmental awareness, many consumers may still be unfamiliar with the benefits and features of electric two-wheelers. Educating consumers about the advantages of electric vehicles, including reduced emissions, lower operating costs, and quieter operation, is essential to dispel misconceptions and encourage adoption.

Key Market Trends

Technological Advancements

The electric two-wheeler industry is witnessing continuous technological advancements, particularly in battery technology and motor efficiency. Lithium-ion batteries, with higher energy density and longer lifespans, are becoming more prevalent, leading to improved riding ranges and performance. Additionally, manufacturers are investing in lightweight materials and smart features to enhance the overall efficiency and user experience of electric two-wheelers.

Diverse Product Offerings

Manufacturers are expanding their product offerings to cater to diverse consumer preferences and needs. The market now offers a wide range of electric two-wheelers, including electric scooters, motorcycles, mopeds, and e-bikes. These vehicles come in various sizes, styles, and performance levels, enabling consumers to choose electric two-wheelers that align with their specific usage requirements and personal tastes.

Policy Support and Incentives

Governments across Europe are introducing supportive policies and incentives to promote the adoption of electric vehicles, including electric two-wheelers. These measures often include financial incentives such as subsidies, tax benefits, and reduced registration fees for electric two-wheelers. Additionally, some cities have implemented

specific regulations to accommodate electric scooters and e-bikes in dedicated lanes or parking spaces, making them more accessible and attractive to consumers.

Segmental Insights

Vehicle Type Insights

Electric scooters have gained significant popularity in the European electric two-wheeler market, surpassing electric motorcycles in terms of consumer preference. These sleek and efficient vehicles have established themselves as the go-to choice for urban commuting, short-distance travel, and last-mile connectivity, offering a convenient and eco-friendly alternative for city dwellers. With their compact size, agile maneuverability, and lower purchase price compared to electric motorcycles, electric scooters have become the favored option for individuals seeking a practical and cost-effective mode of transportation. Additionally, their quiet operation and zero-emission nature contribute to a cleaner and more sustainable urban environment. Thus, it's no surprise that electric scooters continue to dominate the market, catering to the evolving needs of modern commuters.

On the other hand, electric motorcycles offer higher performance capabilities and longer ranges, making them more suitable for longer journeys and highway riding. With their advanced battery technology and efficient electric motors, electric motorcycles provide the perfect balance of power and endurance, allowing riders to confidently explore new horizons. While electric motorcycles are gaining traction in the market, they typically have a smaller market share compared to electric scooters. This is mainly due to their higher cost, as electric motorcycle components and technology are often more expensive. Additionally, the preference for scooters among urban commuters, who value their compact size and maneuverability, also contributes to the higher popularity of electric scooters in densely populated areas. However, as electric motorcycle technology advances and becomes more affordable, we can expect to see an increase in their market share and a greater adoption among riders seeking thrilling experiences on two wheels.

Battery Type Insights

Lithium-ion (Li-ion) batteries are the most dominant type of electric battery used in the European electric two-wheeler market. Li-ion batteries have become the preferred choice for electric vehicles, including electric scooters and motorcycles, due to their numerous advantages. Li-ion batteries offer higher energy density, lighter weight, faster

charging times, and longer lifespans compared to traditional lead-acid and nickel-metal hydride (NiMH) batteries. The higher energy density of Li-ion batteries allows electric two-wheelers to have longer riding ranges on a single charge, making them more practical and convenient for daily commuting and longer journeys. Additionally, the lighter weight of Li-ion batteries contributes to overall vehicle weight reduction, leading to improved performance and handling. Furthermore, Li-ion batteries offer faster charging times, allowing users to recharge their electric two-wheelers more quickly and conveniently. This feature is particularly important for urban commuters who may need to recharge their vehicles during the day. The longer lifespan of Li-ion batteries also results in reduced maintenance costs for electric two-wheelers, making them more cost-effective over the vehicle's lifetime.

Regional Insights:

Italy holds a prominent market share in the electric two-wheeler market in Europe due to several key factors. The country's strong urban commuting culture, with a preference for two-wheelers like scooters and motorcycles, has facilitated the transition to electric versions for sustainable urban mobility. Italy's government has also played a vital role by offering incentives and supportive policies, such as tax benefits and subsidies, encouraging consumers to opt for electric two-wheelers as environmentally friendly and cost-effective alternatives. The presence of well-established automotive manufacturers and the development of a charging infrastructure has further boosted the adoption of electric two-wheelers. Italy's commitment to reducing greenhouse gas emissions and addressing climate change aligns with the country's environmental awareness and goals, making electric two-wheelers a popular choice. Additionally, the demand from the tourism industry for sustainable and convenient mobility solutions has contributed to the growth of electric two-wheelers as popular choices for tourists exploring cities and tourist attractions in an eco-friendly manner.

Key Market Players

Yadea Group Holdings Ltd.

AIMA Technology Co., Ltd.

Jiangsu Xinri E-Vehicle Co., Ltd.

Zhejiang Luyuan Electric Vehicle

Dongguan Tailing Electric Vehicle Co., Ltd.

Shandong Incalcu Electric Vehicle Co., Ltd.

Hero Electric Vehicles Pvt Ltd.

Okinawa Autotech Pvt. Ltd.

Gogoro, Inc.

Zero Motorcycles, Inc.

Report Scope:

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

Europe Electric Two-Wheeler Market, By Vehicle Type:

Scooter/Moped

Motorcycle

Europe Electric Two-Wheeler Market, By Battery Capacity:

25Ah

Europe Electric Two-Wheeler Market, By Battery Type:

Lead Acid

Li-ion

NiMH

Europe Electric Two-Wheeler Market, By Country:

Netherlands

Spain

Italy

Austria

o Germany

o France

o United Kingdom

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe Electric two-wheeler Market.

Available Customizations:

The Europe Electric two-wheeler 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).

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