

Saudi Arabia Two-Wheeler Market Segmented By Vehicle Type (Scooter/Moped, Motorcycle), By Propulsion Type (ICE and Electric), By Region, By Company, Forecast & Opportunities, 2028

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Abstracts

The Saudi Arabian two-wheeler market has undergone substantial growth and transformation in recent years. This market predominantly comprises motorcycles, scooters, and mopeds, catering to a diverse consumer base with varying transportation needs. The factors driving this growth include rapid urbanization, population growth, and evolving lifestyles, all contributing to an increased demand for two-wheelers as a practical and cost-efficient mode of transportation. Among these, motorcycles stand out due to their agility, fuel efficiency, and adeptness in navigating congested city traffic, making them a popular choice for daily commuting.

The Saudi Arabian government's efforts to diversify the economy and decrease reliance on oil have also played a pivotal role in boosting the two-wheeler market. Investments in infrastructure and transportation, coupled with initiatives to promote tourism and leisure activities, have created an environment conducive to the expansion of the motorcycle and scooter segment. These vehicles cater not only to urban commuting needs but also attract enthusiasts seeking recreational and adventurous experiences.

Key Market Drivers

Urbanization and Congestion:

The swift urbanization of major Saudi Arabian cities, combined with population growth, has intensified traffic congestion and urban mobility challenges. Two-wheelers, particularly motorcycles and scooters, offer a practical solution for navigating crowded

streets and reaching destinations more efficiently. Their compact size and maneuverability enable riders to bypass traffic jams, making them a desirable option for daily commuting.

Economic Efficiency:

Two-wheelers inherently boast higher fuel efficiency compared to conventional four-wheel vehicles, positioning them as a cost-effective transportation solution. In a country where fuel costs hold significant weight, especially relative to car ownership, motorcycles and scooters offer economical alternatives. Consumers are drawn to these vehicles due to their ability to cover longer distances with less fuel, ultimately reducing transportation expenses.

Shifting Lifestyles and Mobility Preferences:

Modern lifestyles in Saudi Arabia prioritize convenience, flexibility, and speed in transportation. This trend is particularly prominent among younger generations who value efficient navigation through traffic. Two-wheelers align with these evolving preferences, providing a swift and agile means of travel that resonates with the demands of contemporary urban life.

Government Initiatives and Infrastructure Development:

Saudi Arabia's government initiatives to diversify the economy and boost tourism have led to substantial investments in infrastructure and transportation. Enhanced road networks, dedicated lanes, and infrastructure improvements bolster the growth of the two-wheeler market. Government support for tourism and leisure activities further propels the adoption of motorcycles and scooters for recreational purposes.

Gender Equality and Women's Empowerment:

The historic lifting of the ban on women driving in Saudi Arabia has empowered women to explore diverse transportation options. This change has resulted in a noteworthy increase in female riders opting for two-wheelers due to their convenience and accessibility. As the number of women choosing motorcycles and scooters rises, the customer base expands, contributing to market growth.

Recreational and Adventure Tourism:

Saudi Arabia's promotion of recreational and adventure tourism has sparked interest in activities such as motorcycling and off-road exploration. Enthusiasts seeking unique travel experiences drive demand for recreational two-wheelers. The nation's varied landscapes provide opportunities for thrilling rides and off-road adventures, propelling the popularity of motorcycles and similar vehicles.

Youth Demographics and Lifestyle Trends:

The youthful demographic in Saudi Arabia increasingly embraces motorcycling as a lifestyle choice and means of self-expression. Motorcycles symbolize freedom and individuality, resonating with the aspirations and preferences of younger generations. Sociocultural factors contribute to the adoption of two-wheelers as a trendy and appealing mode of transportation.

Key Market Challenges

Regulatory Challenges:

Saudi Arabia's government has implemented strict rules and regulations to ensure top-tier safety standards for all vehicles, including two-wheelers. These stringent safety requirements are enforced to ensure the well-being of riders and other road users. Consequently, manufacturers must adhere to these safety standards, which may result in higher production costs. However, this safety emphasis ultimately benefits everyone by mitigating accident risks and fostering a safer transportation environment.

Cultural Perception:

Motorcycles and scooters, collectively known as two-wheelers, are sometimes unjustly associated with lower-status transportation or high-risk behavior. This cultural perception, influenced by various factors such as media portrayals and societal norms, significantly affects two-wheeler demand across different regions and communities. Despite these perceptions, acknowledging the practicality, affordability, and convenience that two-wheelers offer as a transportation mode is crucial. By comprehending the intricacies of this perception, efforts can be made to promote a more inclusive and informed perspective on two-wheelers in society.

Infrastructure:

The existing infrastructure in Saudi Arabia does not fully facilitate the use of two-

wheelers. The absence of dedicated lanes and parking spaces, coupled with high traffic, poses substantial challenges for two-wheeler users. Consequently, riders often navigate congested roads, competing for space with larger vehicles. The lack of proper infrastructure also hampers the promotion of sustainable and eco-friendly transportation modes, limiting the potential benefits that two-wheelers could offer the community. Recognizing these issues and investing in infrastructure development that caters to two-wheeler users' needs is essential for safer and more efficient commuting options.

Climate:

Saudi Arabia's arid desert climate might make two-wheelers less appealing as a mode of transportation. Elevated temperatures and dust storms can render riding uncomfortable and potentially hazardous.

Petroleum Subsidies:

Significant subsidies on petrol prices in Saudi Arabia often steer the population towards cars, overshadowing more fuel-efficient two-wheelers. This preference for cars is attributed to the convenience and perceived status linked to car ownership. However, as long as these subsidies remain, the demand for two-wheelers, despite their environmental and economic advantages, may persist at relatively lower levels. This underscores the necessity for a comprehensive approach addressing both the economic incentives and the environmental consequences of transportation choices.

Key Market Trends

Urbanization and Economic Growth:

As Saudi Arabian cities continue their rapid growth and urbanization, the necessity for efficient and sustainable personal transportation options becomes even more pronounced. In this context, two-wheelers such as motorcycles and scooters gain traction due to their exceptional maneuverability in congested traffic scenarios and cost-effectiveness compared to conventional four-wheel vehicles. Compact and agile, two-wheelers provide a practical and convenient solution for commuting and navigating urban areas, contributing to the overarching goal of reducing traffic congestion and carbon emissions. The surge in two-wheeler popularity underscores the growing recognition of their numerous advantages, positioning them as a viable and appealing choice for modern urban residents.

Youth Demographics:

Saudi Arabia's young population, with evolving urbanization and shifting transportation needs, fuels the demand for two-wheelers. These versatile vehicles not only offer an affordable and efficient mode of transportation but also perfectly align with the dynamic lifestyle of the youth. Whether maneuvering through bustling city streets or exploring scenic routes, two-wheelers deliver a convenient and exhilarating experience for the younger generation.

E-mobility:

An escalating trend towards electric two-wheelers is observable as environmental concerns gain traction, and the need for sustainable transportation options becomes evident. Rising apprehensions regarding air pollution and climate change prompt individuals to seek alternatives to conventional gasoline-powered vehicles. Moreover, government initiatives and incentives aimed at fostering clean energy contribute significantly to the adoption of electric two-wheelers. This shift towards eco-friendly transportation not only curtails carbon emissions but also contributes to a greener and more sustainable future.

Female Ridership:

Since the removal of the ban on women driving, female ridership for two-wheelers has witnessed a remarkable surge. This transformation not only opens new avenues of mobility for women but also gives rise to a dedicated market segment tailored to their preferences and requirements. This empowering movement reshapes the transportation landscape, fostering inclusivity and equality.

Rise in Ride Sharing and Delivery Services:

The surge in e-commerce and growing reliance on delivery services propel a substantial and continuous demand for two-wheelers. These vehicles prove highly efficient and cost-effective, enabling swift and convenient transportation of goods. Their agility in congested urban areas and ability to navigate through traffic position them as the optimal choice for last-mile deliveries, enhancing the overall efficiency and efficacy of the delivery ecosystem.

Segmental Insights

Insights on Vehicle Types:

In Saudi Arabia, motorcycles hold a more substantial market share compared to scooters. This preference primarily stems from the country's climatic conditions, where the higher speeds and superior cooling systems of motorcycles are better suited than scooters. Furthermore, motorcycles are perceived as more versatile for Saudi Arabia's diverse terrain, ranging from city streets to desert landscapes. Additionally, motorcycles offer a sense of freedom and adventure, enabling riders to explore vast landscapes and experience the thrill of riding through desert dunes. The robust engines and sturdy frames of motorcycles evoke confidence and reliability, making them the preferred choice for extended journeys and off-road adventures.

Fuel Type Insights:

The fuel type landscape in Saudi Arabia's two-wheeler market is undergoing a noteworthy transformation driven by the escalating demand for electric vehicles. This surge can be attributed to the government's resolute commitment to reducing dependence on fossil fuels and the growing environmental consciousness among consumers. While petrol-fueled two-wheelers maintain a dominant market share due to their established infrastructure and familiarity among consumers, the prospects for electric two-wheelers in Saudi Arabia appear promising. Continuous advancements in battery technology and the establishment of robust charging infrastructure augur substantial growth for the electric two-wheeler market, heralding a greener and more sustainable mode of transportation for the Kingdom.

Insights on Regional Trends:

The Western Region commands the largest market share for two-wheelers in Saudi Arabia, encompassing bustling cities like Jeddah and Makkah. This region boasts a dense population and a thriving tourism sector, especially during the Hajj and Umrah seasons, drawing visitors from around the globe. The utilization of two-wheelers in these vibrant cities not only offers an efficient and cost-effective mode of transportation but also facilitates easy navigation through congested streets, ensuring swift mobility for both locals and tourists. Moreover, the region's youthful population, known for their adventurous spirit, exhibits a strong affinity for two-wheelers, further propelling the demand for these vehicles.

Key Market Players

Suzuki Barayan (Saleh Omar Barayan Sons Co Ltd)

Harley-Davidson Inc. (M.A. Al-Mutlaq Sons Co.)

Yamaha Motor Co., Ltd. (Al Khorayef Commercial Co. Ltd.)

KTM AG (Tristar Motorcycles LLC)

Moto Guzzi (Tristar Motorcycles LLC)

Honda Motor Company Limited (Abdullah Hashim Company Ltd.)

Kawasaki Motors Ltd. (Arabian Auto Agency Co. Ltd.)

BMW Motorrad (Mohamed Yousuf Naghi Motors Co.)

Hero MotoCorp Ltd. (M.A. Al-Mutlaq Sons Co.)

Report Scope:

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

Saudi Arabia Two-Wheeler Market, By Vehicle Type:

Scooter/Moped

Motorcycle

Saudi Arabia Two-Wheeler Market, By Propulsion Type:

ICE

Electric

Saudi Arabia Two-Wheeler Market, By Region:

Northern & Central

Western

Eastern

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Two-Wheeler Market.

Available Customizations:

Saudi Arabia 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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