

South Africa Two-Wheeler Market By Vehicle Type (Scooter/Moped, Motorcycles), By Propulsion Type (ICE, Electric), By Region, Competition, Opportunities and Forecast, 2020-2030F

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Abstracts

Market Overview:

South Africa Two-Wheeler Market was valued at USD 815.49 Million in 2024 and is expected to reach USD 1508.88 Million by 2030 with a CAGR of 10.80% during the forecast period. The South Africa two-wheeler market is undergoing a steady transformation, fueled by increased urbanization, rising traffic congestion, and the growing need for economical mobility solutions. For instance, In 2023, South Africa's automotive industry set a record for vehicle exports, with 399,594 units exported and total production reaching 633,332 vehicles. This marked a remarkable recovery from 2020's 441,822 vehicles produced. The industry generated USD 14.26 billion in revenue from vehicle and component exports, reflecting a 19.1% growth compared to 2022. Exports to South African countries totaled 25,381 vehicles, highlighting strong potential for expansion under the South African Continental Free Trade Area (AfCFTA). The automotive sector employs 116,069 people and contributes 3.2% to the GDP. Noteworthy investments in 2023 included BMW's USD 236.84 billion for X3 Plug-in Hybrid production, Stellantis's 157.89 billion for a new Coega facility, and Ford's USD 273.68 billion for PHEV production at the Silverton Assembly Plant. With the cost of owning and maintaining four-wheel vehicles becoming increasingly burdensome for many urban residents, two-wheelers have emerged as a viable and practical alternative for daily commuting. The younger working population, especially in densely populated urban centers, is embracing motorcycles and scooters for their convenience, fuel efficiency, and ability to navigate through congested streets with ease. The rise in e-commerce and food delivery services has also contributed significantly to this trend, as

businesses seek agile and cost-effective delivery options. Technological advancements in two-wheeler manufacturing, including better mileage, improved safety features, and modern design aesthetics, are appealing to a wide segment of consumers looking for performance and value.

Electric two-wheelers are creating new opportunities in the market as consumers become more environmentally conscious and fuel prices remain volatile. Initiatives aimed at promoting electric mobility and reducing dependence on fossil fuels are paving the way for increased adoption of battery-powered scooters and motorcycles. These vehicles offer long-term savings on operational costs and are gradually gaining traction among urban riders and small-scale commercial users. Another growth driver is the expansion of financing options and digital purchase platforms, making two-wheelers more accessible to a wider demographic. Buyers can now explore, compare, and purchase vehicles online with minimal paperwork, and financing companies have introduced customized loan products for first-time vehicle owners, encouraging entry into the two-wheeler segment. This shift in consumer behavior and financing support has broadened the market base significantly.

However, the sector also faces a few persistent challenges. The lack of standardized safety regulations specific to two-wheelers has led to inconsistent quality and safety levels across different models, which can hinder consumer confidence. Poor road conditions and infrastructure limitations in urban and rural areas contribute to higher maintenance costs and reduce the lifespan of two-wheelers, deterring long-term investment in premium models. There is also limited availability of skilled service technicians and authorized spare parts vendors, which impacts aftersales service quality. Rising insurance premiums and instances of motorcycle theft also pose risks that dissuade potential buyers. Despite these hurdles, the market is expected to see sustained momentum, driven by the shift toward cost-effective mobility and the continuous evolution of last-mile transport and micro-logistics solutions.

Market Drivers

Increasing Urbanization and Traffic Congestion

Urban areas in South Africa are growing rapidly, leading to higher traffic congestion, especially in metropolitan cities like Johannesburg and Cape Town. Two-wheelers offer a practical solution to navigate through traffic, making them highly appealing to urban commuters. With limited parking space and increasing traffic jams, owning a two-wheeler is often seen as a faster, more affordable alternative. Moreover, as urbanization

continues, the demand for affordable and efficient transportation options will only intensify. This urban shift is leading to a significant rise in the adoption of two-wheelers. As the market grows, two-wheeler manufacturers are also focusing on enhancing vehicle efficiency to meet urban mobility needs. Additionally, expanding infrastructure like dedicated bike lanes will further fuel the growth of two-wheelers in urban areas. These infrastructural improvements will make two-wheelers a more attractive and safer mode of transport, leading to sustained demand. For instance, in 2023, South Africa's public-sector capital expenditure reached USD 12.51 billion, marking a 10.9% increase from USD 11.28 billion in 2022. This growth signifies the second consecutive annual rise following a five-year decline, driven by post-pandemic recovery efforts and the acceleration of infrastructure projects. Public corporations led the spending with R87 billion (approximately \$4.6 billion), accounting for 37.5% of the total. Municipalities followed with R62 billion (\$3.3 billion), provincial governments contributed R35 billion (\$1.9 billion), extra-budgetary accounts and funds (EBAs) invested R22 billion (\$1.2 billion), national government departments spent R17 billion (\$0.9 billion), and higher education institutions allocated R9.5 billion (\$0.5 billion).

Key Market Challenges

Safety Concerns and High Accident Rates

Despite their affordability and convenience, two-wheelers are inherently more vulnerable to accidents and injuries than cars. South Africa's road safety record remains a concern, with motorcyclists and cyclists often involved in traffic accidents. A lack of dedicated lanes for two-wheelers, coupled with reckless driving, increases the risks faced by riders. Safety remains a critical issue, and improving safety standards, enforcing traffic rules, and providing better rider training programs are necessary to address these challenges. As the market grows, ensuring better road safety will be pivotal in reducing accidents and increasing consumer confidence in two-wheelers. Moreover, stricter enforcement of traffic laws and the installation of safety infrastructure such as dedicated bike lanes will help mitigate these risks. The development of advanced safety features like ABS in two-wheelers could also reduce accident rates.

Key Market Trends

Growing Popularity of Electric Two-Wheelers

The global push for cleaner energy sources is influencing South African consumers to consider electric two-wheelers as a viable alternative to gasoline-powered options.

Electric two-wheelers are gaining popularity due to their eco-friendly nature, lower operating costs, and minimal maintenance requirements. With advancements in battery technology, electric two-wheelers are becoming more affordable and practical for everyday use. As the South African government continues to encourage the adoption of electric vehicles through incentives and infrastructure development, electric two-wheelers are expected to play a significant role in the future of the market. Moreover, the rise in environmental awareness is encouraging consumers to choose electric options to reduce their carbon footprint. The growing availability of charging stations and improved battery life will also contribute to the further growth of electric two-wheelers.

Key Market Players

Bajaj Auto Ltd.,

TVS Motor Company Limited

Yamaha Motor Co., Ltd

Hero MotoCorp Ltd

Honda Motor Co, Ltd

Kwang Yang Motor Co., Ltd

Suzuki Motor Corporation

Sanyang Motor Co., Ltd

Lifan Motors

Luoyang Northern EK Chor Motorcycle Co., Ltd.

Report Scope:

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

South Africa Two-Wheeler Market, By Vehicle Type:

Scooter/Moped

Motorcycles

South Africa Two-Wheeler Market, By Propulsion Type:

ICE

Electric

South Africa Two-Wheeler Market, By Region:

Gauteng

Kwazulu-Natal

Western Cape

Eastern Cape

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the South Africa Two-Wheeler Market.

Available Customizations:

South Africa Two-Wheeler Market report with the given market data, TechSci Research offers customizations according to the 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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