

# **Two-Wheeler Battery Market – Global Industry Size, Share, Trends Opportunity, and Forecast 2018-2028 Segmented By Vehicle Type (Motorcycles, Mopeds, Scooters, Electric Bikes), By Battery Type (Lead Acid, Lithium-Ion, and Other), By Drive Type (IC Engines and Electric Vehicles), By Region, Competition**

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## **Abstracts**

The Global Two-Wheeler Battery Market size reached USD 6.4 billion in 2022 and is expected grow with a CAGR of 7.3% in the forecast period.

The global Two-Wheeler Battery Market is a vital component of the automotive industry, catering to the power needs of motorcycles, scooters, electric bicycles (e-bikes), and other two-wheeled vehicles. These batteries serve as the heart of these vehicles, providing the necessary energy to start the engines and power their electrical systems.

One of the key drivers of this market is the significant rise in urbanization and the increasing demand for affordable and convenient modes of personal transportation in densely populated urban areas. Two-wheelers, particularly motorcycles and scooters, offer a practical solution for navigating congested city streets. As a result, the market for these vehicles has been on a steady growth trajectory, contributing to the demand for reliable and efficient two-wheeler batteries. Moreover, the global push for cleaner and more sustainable transportation options has further propelled the Two-Wheeler Battery Market. Governments and environmental organizations are advocating for reduced emissions, which has led to the development and adoption of electric two-wheelers, including e-bikes and electric scooters. These electric vehicles rely on advanced battery technologies to provide longer ranges and increased performance, enhancing their appeal to environmentally conscious consumers.

Technological advancements in battery chemistry and manufacturing processes are also playing a significant role in shaping this market. Battery manufacturers are continuously innovating to improve energy storage capacity, durability, and charging efficiency. These advancements are crucial for the development of high-performance batteries that can meet the demands of both conventional and electric two-wheelers.

The global Two-Wheeler Battery Market is characterized by regional variations, reflecting diverse consumer preferences, regulatory environments, and levels of government support. For instance, Asia-Pacific, particularly India and Southeast Asian countries, dominates the market due to the high prevalence of two-wheelers in the region. In contrast, North America and Europe have been witnessing a growing interest in electric two-wheelers, driving the demand for advanced batteries in these markets. The global Two-Wheeler Battery Market is an integral part of the urban mobility landscape, providing the power source for millions of motorcycles, scooters, e-bikes, and other two-wheeled vehicles. The market's growth is driven by urbanization, the demand for sustainable transportation solutions, technological innovations in battery technology, and regional variations in consumer preferences and regulations. As the world continues to prioritize clean and efficient transportation, the Two-Wheeler Battery Market is poised for continued expansion and innovation in the years ahead.

## Key Market Drivers

### Urbanization and Traffic Congestion

Urbanization trends have led to rising population densities in cities, resulting in traffic congestion and longer commute times. Two-wheelers offer a nimble and cost-effective means of navigating through congested urban areas, reducing travel time and fuel consumption. As cities continue to grow, the demand for two-wheelers remains strong, driving the need for reliable and efficient batteries to power these vehicles.

### Affordable Mobility

Two-wheelers are often the most affordable mode of personal transportation, particularly in emerging economies. They provide a practical and cost-effective alternative to four-wheeled vehicles. The affordability factor significantly widens the consumer base for two-wheelers, leading to increased sales and, consequently, a growing demand for batteries.

## Environmental Concerns

Increasing awareness of environmental issues and the need for sustainable transportation solutions have prompted a shift toward electric two-wheelers. Electric motorcycles, scooters, and e-bikes produce zero tailpipe emissions and are seen as environmentally friendly alternatives. This transition to electric mobility relies on advanced batteries to store and provide energy for electric propulsion systems, stimulating the Two-Wheeler Battery Market.

## Stringent Emissions Regulations

Governments and regulatory bodies worldwide are implementing stringent emissions regulations to combat air pollution and reduce greenhouse gas emissions. In response, manufacturers are developing electric and hybrid two-wheelers to meet these regulations. These eco-friendly vehicles rely on advanced batteries to power electric motors, making batteries an essential component in achieving compliance with emissions standards.

## Technological Advancements

Battery technology continues to advance rapidly. Innovations in lithium-ion batteries, such as improved energy density, faster charging capabilities, and enhanced durability, are crucial for improving the performance of electric two-wheelers. These technological advancements make electric two-wheelers more attractive to consumers and promote market growth.

## Government Incentives

Many governments incentivize the adoption of electric two-wheelers through subsidies, tax credits, and other financial incentives. These policies reduce the overall cost of ownership for consumers, making electric two-wheelers more affordable and encouraging their adoption. Government support has a direct impact on increasing the demand for batteries used in electric two-wheelers.

## Consumer Preference for Electric Mobility

Consumer preferences are shifting toward electric mobility due to the quieter, smoother, and environmentally friendly nature of electric two-wheelers. This change in consumer sentiment is driving manufacturers to expand their electric two-wheeler offerings, further

propelling the demand for batteries.

### Infrastructure Development

The expansion of charging infrastructure is critical for the widespread adoption of electric two-wheelers. Charging stations for electric motorcycles, e-bikes, and scooters are becoming more accessible and convenient, alleviating range anxiety and enhancing the appeal of electric two-wheelers. An extensive charging network contributes to the growth of the market.

The global Two-Wheeler Battery Market is strongly influenced by a combination of factors, including urbanization, affordability, environmental concerns, emissions regulations, technological advancements, government incentives, changing consumer preferences, and infrastructure development. These drivers collectively contribute to the market's expansion and the increasing adoption of electric and hybrid two-wheelers worldwide.

### Key Market Challenges

#### Limited Range for Electric Two-Wheelers

One of the primary challenges facing electric two-wheelers is their limited range compared to conventional gasoline-powered counterparts. While battery technology is improving, electric motorcycles and e-bikes often have shorter ranges, making long-distance travel less practical. Addressing this range limitation is crucial to expanding the adoption of electric two-wheelers.

#### Charging Infrastructure Gaps

The availability and accessibility of charging infrastructure for electric two-wheelers vary widely across regions. Many areas lack a robust charging network, which can deter potential buyers due to concerns about range and charging convenience. Expanding the charging infrastructure to cover urban and rural areas is essential for fostering the growth of electric two-wheelers.

#### Battery Charging Time

Charging electric two-wheeler batteries can be time-consuming, particularly when using standard household outlets. Fast-charging solutions are emerging, but further reducing

charging times is essential to enhance the practicality of electric two-wheelers for daily use.

### Battery Degradation and Lifespan

Batteries in electric two-wheelers degrade over time due to factors like usage patterns and environmental conditions. Battery replacement costs can be a concern for owners, and ensuring the durability and longevity of batteries remains a challenge for manufacturers.

### Affordability

Electric two-wheelers, while cost-effective in the long run, often have higher upfront purchase prices compared to their gasoline-powered counterparts. The initial cost can be a barrier for potential buyers, despite potential savings in fuel and maintenance over time.

### Safety Concerns

Lithium-ion batteries, commonly used in electric two-wheelers, can pose safety risks if damaged or improperly handled. Battery safety standards and consumer education are essential to mitigate these risks and build confidence in electric two-wheelers.

### Regulatory Challenges

Regulatory frameworks for electric two-wheelers can vary significantly from region to region, affecting market entry and compliance for manufacturers. Streamlining regulations and establishing uniform standards can facilitate market growth.

### Consumer Awareness

Building awareness among consumers about the benefits of electric two-wheelers and dispelling myths and misconceptions is an ongoing challenge. Many potential buyers may be unaware of the advantages of electric mobility and may need education to make informed choices.

These challenges are crucial for the global Two-Wheeler Battery Market to realize its full potential and accelerate the adoption of electric two-wheelers. Manufacturers, governments, and industry stakeholders must work collaboratively to overcome these

obstacles and create an environment conducive to the widespread use of electric motorcycles, scooters, and e-bikes.

## Key Market Trends

### Rapid Growth of Electric Two-Wheelers

The adoption of electric two-wheelers, including electric motorcycles, scooters, and e-bikes, is surging worldwide. Consumers are increasingly turning to these vehicles for their eco-friendly attributes, low operating costs, and ease of use. This trend is driving a substantial demand for batteries tailored to electric propulsion systems.

### Advancements in Battery Technology

Battery technology is evolving rapidly, with a focus on improving energy density, charging speed, and overall performance. Lithium-ion batteries remain the dominant choice, but innovations such as solid-state batteries and alternative chemistries are emerging, promising higher energy storage capacity and longer lifespan.

### Increasing Range for Electric Two-Wheelers

One of the critical trends in electric two-wheelers is the continuous extension of their range. Battery manufacturers are developing high-capacity batteries capable of powering electric motorcycles and e-bikes for longer distances, making them more versatile and suitable for various use cases.

### Urban Mobility Solutions

Urbanization and the need for efficient urban mobility solutions are driving the popularity of electric two-wheelers in cities. They offer a convenient and sustainable means of transportation, especially for short-distance commuting. Shared electric scooters and bike-sharing programs are becoming prevalent in many urban areas.

### Micro-Mobility Services

Micro-mobility services, such as e-scooter rentals and bike-sharing platforms, are flourishing in urban centers. These services rely on electric two-wheelers, creating a substantial demand for batteries and charging infrastructure to support their operations.

## Government Incentives

Many governments are offering incentives and subsidies to encourage the adoption of electric two-wheelers as part of their efforts to reduce emissions and promote sustainable transportation. These incentives include tax breaks, rebates, grants, and exemptions from emissions-related fees.

## Battery Swapping Stations

Battery swapping stations are gaining traction as a means to address charging challenges for electric two-wheelers. This trend involves easily replaceable battery packs, allowing users to swap depleted batteries for fully charged ones quickly. It reduces downtime and range anxiety, making electric two-wheelers more practical.

## Connected Features and Telematics

Electric two-wheelers are increasingly equipped with connected features and telematics systems. These technologies provide real-time data on battery health, energy consumption, and vehicle performance. Riders can monitor their vehicles and receive over-the-air updates, enhancing user experience and safety.

These trends collectively reflect the growing demand for electric two-wheelers and the continuous innovation in battery technology. As urbanization continues and environmental concerns rise, the Two-Wheeler Battery Market is poised for further expansion and advancements, playing a crucial role in shaping the future of urban mobility and sustainable transportation.

## Segmental Insights

The Two-Wheeler Battery Market can be segmented based on battery type, primarily distinguishing between traditional lead-acid batteries and advanced lithium-ion batteries. Lead-acid batteries, while cost-effective, are gradually losing market share to lithium-ion counterparts due to their lower energy density and shorter lifespan. Lithium-ion batteries, favored for their superior performance, energy storage capacity, and durability, are becoming the dominant choice, especially for electric two-wheelers.

This segment categorizes two-wheelers into various types, including motorcycles, scooters, and e-bikes (electric bicycles). Motorcycles, known for their power and versatility, require higher-capacity batteries to meet their performance demands.



Scooters, designed for urban commuting, often use smaller batteries. E-bikes, on the other hand, rely on compact and lightweight batteries that assist pedal power. The choice of battery varies depending on the specific requirements of each vehicle type.

Battery capacity, measured in ampere-hours (Ah) or watt-hours (Wh), is a crucial segment for two-wheelers. Different vehicle types and applications require varying battery capacities. For example, high-performance electric motorcycles may need larger-capacity batteries for extended ranges, while e-bikes may feature smaller batteries designed for shorter commutes. Battery manufacturers offer a range of capacity options to cater to the diverse needs of two-wheelers. The sales channel segment differentiates between original equipment manufacturers (OEMs) and the aftermarket. OEMs supply batteries as part of the vehicle's original configuration, ensuring compatibility and performance. In contrast, the aftermarket involves the sale of replacement batteries and battery-related services, including maintenance and repairs, for existing two-wheelers. Battery replacement and maintenance services are vital for extending the lifespan and reliability of two-wheeler batteries.

Regional variations significantly influence the Two-Wheeler Battery Market. Different regions have distinct preferences for two-wheeler types and usage patterns. For example, Asia-Pacific, particularly India and Southeast Asia, is a stronghold for motorcycles and scooters, whereas e-bikes are more prevalent in Europe. Understanding regional preferences and market dynamics is essential for battery manufacturers to tailor their offerings effectively. These segmental insights offer a comprehensive view of the global Two-Wheeler Battery Market, highlighting how factors such as battery type, vehicle type, battery capacity, sales channels, and regional variations collectively influence market dynamics. Adapting to these diverse segments is crucial for battery manufacturers to remain competitive and address the evolving needs of consumers and the two-wheeler industry in different global markets.

## Regional Insights

Asia-Pacific dominates the global Two-Wheeler Battery Market, driven by the massive two-wheeler market in countries like India, China, and Southeast Asian nations. India is a significant market for motorcycles and scooters. Rapid urbanization, a burgeoning middle class, and the need for affordable mobility solutions have fueled the demand for two-wheelers in this region. Additionally, the shift toward electric two-wheelers, including e-bikes and electric scooters, has been substantial, further boosting the demand for advanced batteries.



Europe is another prominent region in the Two-Wheeler Battery Market, with a strong focus on electric mobility and sustainable transportation solutions. European consumers have shown a growing interest in electric bicycles (e-bikes) and electric scooters, driven by environmental concerns and the need for urban mobility. European countries have well-developed charging infrastructure networks, making electric two-wheelers an attractive option. Government incentives and subsidies have also encouraged the adoption of electric two-wheelers in this region.

North America, particularly the United States and Canada, presents a growing market for electric bicycles and electric scooters, especially in urban areas. Urbanization trends and the desire for eco-friendly commuting options have led to the rise of micro-mobility services, such as e-scooter rentals. While motorcycles have a niche market in North America, electric two-wheelers have gained traction due to their low operational costs and reduced environmental impact. The Middle East and Africa region is witnessing a gradual rise in the adoption of two-wheelers, driven by factors such as urbanization and the need for cost-effective transportation solutions. Motorcycles and scooters are popular for daily commuting in some Middle Eastern countries. While the market for electric two-wheelers is relatively smaller compared to other regions, there is potential for growth, particularly in urban areas with expanding charging infrastructure. Latin America is experiencing a mix of traditional gasoline-powered two-wheelers and the emergence of electric alternatives. Countries like Brazil and Mexico have sizable markets for motorcycles and scooters. The adoption of electric two-wheelers is in its early stages but is expected to grow as awareness of environmental concerns and the benefits of electric mobility increases. Government incentives and regulations may play a role in shaping the market in this region.

Each region contributes uniquely to the global Two-Wheeler Battery Market, reflecting variations in consumer preferences, urbanization rates, and regulatory environments. Understanding these regional nuances is essential for battery manufacturers and two-wheeler producers to tailor their strategies effectively and meet the specific needs of consumers in diverse global markets.

### Key Market Players

Amara Raja Batteries Limited

Panasonic Corporation

Exide Technologies

VARTA

Clarios

GS Yuasa Corporation

Hitachi Group Ltd

Robert Bosch GmbH

China Aviation Lithium Battery Co. Ltd

Contemporary Amperex Technology Co. Limited

Report Scope:

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

#### Two-Wheeler Battery Market, By Vehicle Type:

Motorcycles

Mopeds

Scooters

Electric Bikes

#### Two-Wheeler Battery Market, By Battery Type:

Lead Acid

Lithium-Ion

Other

## Two-Wheeler Battery Market, By Drive Type:

IC Engines

Electric Vehicles

## Two-Wheeler Battery 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 Two-Wheeler Battery Market.

## Available Customizations:

Global Two-Wheeler Battery 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 TWO-WHEELER BATTERY MARKET**

### **5. GLOBAL TWO-WHEELER BATTERY 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 (Motorcycles, Mopeds, Scooters, Electric Bikes)
  - 5.2.2. By Battery Type Market Share Analysis (Lead Acid, Lithium-Ion, and Other)
  - 5.2.3. By Drive Type Market Share Analysis (IC Engines and Electric Vehicles)
  - 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 Two-Wheeler Battery Market Mapping & Opportunity Assessment
  - 5.3.1. By Vehicle Type Market Mapping & Opportunity Assessment
  - 5.3.2. By Battery Type Market Mapping & Opportunity Assessment
  - 5.3.3. By Drive Type Market Mapping & Opportunity Assessment
  - 5.3.4. By Regional Market Mapping & Opportunity Assessment

## **6. ASIA-PACIFIC TWO-WHEELER BATTERY 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 Battery Type Market Share Analysis
  - 6.2.3. By Drive 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 Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 6.3.1.2.3. By Drive Type Market Share Analysis
  - 6.3.2. India Two-Wheeler Battery 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 Battery Type Market Share Analysis
  - 6.3.2.2.3. By Drive Type Market Share Analysis
- 6.3.3. Japan Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 6.3.3.2.3. By Drive Type Market Share Analysis
- 6.3.4. Indonesia Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 6.3.4.2.3. By Drive Type Market Share Analysis
- 6.3.5. Thailand Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 6.3.5.2.3. By Drive Type Market Share Analysis
- 6.3.6. South Korea Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 6.3.6.2.3. By Drive Type Market Share Analysis
- 6.3.7. Australia Two-Wheeler Battery 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 Battery Type Market Share Analysis
- 6.3.7.2.3. By Drive Type Market Share Analysis

## **7. EUROPE & CIS TWO-WHEELER BATTERY 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 Battery Type Market Share Analysis
- 7.2.3. By Drive 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 Two-Wheeler Battery 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 Battery Type Market Share Analysis
- 7.3.1.2.3. By Drive Type Market Share Analysis

#### 7.3.2. Spain Two-Wheeler Battery 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 Battery Type Market Share Analysis
- 7.3.2.2.3. By Drive Type Market Share Analysis

#### 7.3.3. France Two-Wheeler Battery 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 Battery Type Market Share Analysis
- 7.3.3.2.3. By Drive Type Market Share Analysis
- 7.3.4. Russia Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 7.3.4.2.3. By Drive Type Market Share Analysis
- 7.3.5. Italy Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 7.3.5.2.3. By Drive Type Market Share Analysis
- 7.3.6. United Kingdom Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 7.3.6.2.3. By Drive Type Market Share Analysis
- 7.3.7. Belgium Two-Wheeler Battery 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 Battery Type Market Share Analysis
    - 7.3.7.2.3. By Drive Type Market Share Analysis

## **8. NORTH AMERICA TWO-WHEELER BATTERY 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 Battery Type Market Share Analysis

- 8.2.3. By Drive 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 Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 8.3.1.2.3. By Drive Type Market Share Analysis
  - 8.3.2. Mexico Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 8.3.2.2.3. By Drive Type Market Share Analysis
  - 8.3.3. Canada Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 8.3.3.2.3. By Drive Type Market Share Analysis

## **9. SOUTH AMERICA TWO-WHEELER BATTERY 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 Battery Type Market Share Analysis
  - 9.2.3. By Drive 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 Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 9.3.1.2.3. By Drive Type Market Share Analysis
  - 9.3.2. Colombia Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 9.3.2.2.3. By Drive Type Market Share Analysis
  - 9.3.3. Argentina Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 9.3.3.2.3. By Drive Type Market Share Analysis

## **10. MIDDLE EAST & AFRICA TWO-WHEELER BATTERY 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 Battery Type Market Share Analysis
  - 10.2.3. By Drive 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 Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 10.3.1.2.3. By Drive Type Market Share Analysis
  - 10.3.2. Iran Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 10.3.2.2.3. By Drive Type Market Share Analysis
  - 10.3.3. Saudi Arabia Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 10.3.3.2.3. By Drive Type Market Share Analysis
  - 10.3.4. UAE Two-Wheeler Battery 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 Battery Type Market Share Analysis
      - 10.3.4.2.3. By Drive 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. Amara Raja Batteries Limited.

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. Panasonic Corporation.

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. Exide Technologies

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. VARTA

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. Clarios

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. GS Yuasa Corporation

- 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. Hitachi Group 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. Robert Bosch GmbH
  - 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. China Aviation Lithium Battery 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. China Aviation Lithium Battery Co. Ltd.
  - 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 Battery Type

## **16. ABOUT US & DISCLAIMER**

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