Electric Two-Wheel Vehicles in Asia Pacific
Electric Bicycles, Scooters, and Motorcycles: Market Analysis and Forecasts

Sales of internal combustion engine (ICE) scooters are strong in China, India, and most Association of Southeast Asian Nations (ASEAN) countries compared to other regions of the world. Two-wheel vehicles (scooters, motorcycles, and bicycles) are a very popular mode of transport due to their fuel efficiency and ease of use in congested traffic. As a result, consumers in Asia Pacific markets are heavily adopting traditional two-wheel vehicles. Largely driven by costs, these vehicles provide a mode of transportation for individuals who may not be able to afford a car yet. In many places, scooters, motorcycles, and bicycles are designed to carry additional cargo and people and, therefore, are more accommodating to families.

The growth of the total market for these vehicles within Asia Pacific is also leading to strong expansion of the electric two-wheel vehicle industry in the region. Adoption of e-bicycles, e-motorcycles, and e-scooters will continue to be driven by rapid urbanization trends and the increase in household incomes. Economic prosperity will result in a greater number of middle and high income level consumers, which will contribute to the growth of the electric two-wheel vehicle market. Since the total cost of ownership (TCO) of e-motorcycles and e-scooters remains low enough to see payback on the vehicle with a year or two of purchase, Pike Research’s analysis finds that the market for electric two-wheel vehicles is likely to remain strong in regions with high economic growth rates.

This Pike Research report provides an in-depth assessment of current market dynamics and the future growth potential for electric bicycles, scooters, and motorcycles in the Asia Pacific region, along with profiles of the key industry players who are defining these rapidly-evolving markets. The study examines the market forces that are driving adoption of electric two-wheel vehicles in key countries, including demographic trends, consumer behavior, and government initiatives. The report also analyzes the technology issues surrounding this sector such as the changing mix of battery chemistries and key trends in battery management systems and electric motors. Detailed vehicle sales forecasts are provided for each vehicle category through 2018, segmented by country.

**KEY MARKET FORECASTS:**
- Electric Two-Wheel Vehicle Sales by Country, Asia Pacific: 2012-2018
- Cumulative Electric Two-Wheel Vehicle Sales by Country, Asia Pacific: 2012-2018
- Electric Scooter Sales by Country, Asia Pacific: 2012-2018
- Electric Motorcycle Sales by Country, Asia Pacific: 2012-2018
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- Percentage of E-Motorcycles, E-Scooters, and E-Bicycles with Li-ion Batteries by Region, Asia Pacific: 2012-2018
- Percentage of SLA Electric Bicycle Sales by Region, Asia Pacific: 2012-2018

**VEHICLE CATEGORIES:**
- Electric Bicycles
- Electric Motorcycles
- Electric Scooters

**GEOGRAPHIES:**
- China
- India
- Indonesia
- Japan
- Korea
- Malaysia
- Taiwan
- Thailand
- Vietnam
- Rest of Asia Pacific
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KEY QUESTIONS ADDRESSED:

- What is the current market size for electric bicycles, motorcycles, and scooters in Asia Pacific, and how fast will the market grow in the coming years?
- What social and economic factors are driving the growth of electric two-wheel vehicles in the APAC region?
- What are the prospects for two-wheel vehicle adoption in countries outside China?
- Which battery technologies will be used for electric two-wheel vehicles in APAC?
- How will government programs influence two-wheel vehicle adoption in APAC markets?
- Who are the key industry players in each major vehicle segment in APAC?

WHO NEEDS THIS REPORT?

- E-bicycle, e-motorcycle, and e-scooter manufacturers
- Two-wheel vehicle component suppliers
- Battery manufacturers
- Retailers
- Utilities
- Government agencies and municipal planners
- Industry associations
- Investor community

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