

E-bike Motor - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The E-bike Motor Market size is estimated at USD 4.48 billion in 2025, and is expected to reach USD 9.47 billion by 2030, at a CAGR of 16.16% during the forecast period (2025-2030).

Several factors, including a push for eco-friendly transportation and heightened health consciousness, are fueling the rapid growth of the electric bike motor market. Major cities worldwide grapple with pollution, largely due to rising vehicular gas emissions and noise. This backdrop has spurred a global demand for clean energy and high-powered vehicles, bolstering the e-bike market. Looking ahead, as consumers increasingly gravitate towards adventure and recreational activities, and with e-bikes finding new applications in sectors like rentals and logistics, the demand for e-bike motors is set to surge.

Rising fuel costs over the last decade have nudged many towards adopting electric bicycles for daily commutes. This uptick in fuel prices can be traced back to surges in crude oil costs, predominantly influenced by the Organization of the Petroleum Exporting Countries. As cities worldwide emerge from lockdowns, e-bikes are witnessing a surge in demand, thanks to their operational cost-effectiveness and convenience.

In response to escalating environmental and health concerns tied to rising emissions, governments and global organizations are tightening emission norms to curb carbon footprints. Furthermore, the advent of high-performance e-bikes is poised to significantly bolster the demand for e-bike motors in the coming years.

E-bike Motor Market Trends

Below 250 W Capacity Segment Dominating The Market Growth

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Due to their suitability for flat terrain and urban commuting, 250W e-bike drive units are significantly shaping the e-bike drive unit market. These e-bikes enjoy particular popularity in the Asia-Pacific and European regions, where urban infrastructure and short commute distances are the norms. The choice of these lower-power e-bikes is driven by their sufficient performance in city settings and adherence to regional regulations.

European regulations cap e-bike power output at 250 watts, ensuring riders are propelled at speeds not exceeding 25kph. This law reclassifies e-bikes exceeding this power as motorcycles, necessitating extra type approval and homologation. As a result, manufacturers are channeling their efforts into producing e-bikes that stay within the 250W limit. For example, in regions like South Germany, Switzerland, and Austria, where mountainous terrains are common, e-bikes with higher power face motorcycle classification. This has led to a heightened demand for compliant models tailored for flat urban settings.

Technological advancements are propelling the rise of hub-type motors in the sub-250W e-bike segment. These motors strike a balance between efficiency, cost, and ease of integration, making them a preferred choice. For instance, in March 2023, Acer unveiled a lightweight e-bike boasting a 250W hub drive, offering a 70-mile range and a top speed of 20 mph, tailored for urban commuters. In a similar vein, Specialized rolled out the Globe Haul ST series in October 2022, featuring sub-250W e-bikes optimized for utility and storage, underscoring the market's pivot towards practical, low-power e-bikes.

In line with this trend, Tata International's Stryder subsidiary launched the Zeeta Electric Bicycle in March 2023. This model, powered by a 36 V 250W BLDC rear hub motor, underscores the demand for budget-friendly and efficient e-bikes in urban locales, spotlighting the momentum towards below 250W e-bike drives.

These trends underscore the influence of regulatory frameworks, urbanization, and tech advancements on the rising demand for sub-250W e-bike drives. With cities expanding and emphasizing sustainable transport, the e-bike drive unit market is poised for growth, with sub-250W models at the forefront.

Asia-Pacific is Expected to Witness Higher Growth During the Forecast Period -

The Asia-Pacific region is poised to lead the e-bike market, with its dominance expected to continue. China's e-bike sales are driving a surge in the region's growth. Over the past two years, China has accounted for over 50% of the Asia-Pacific e-bike motor market, largely due to its efforts to combat heavy traffic and rising vehicle pollution.

The China Bicycle Association reports that annual e-bike sales in China have topped 30 million units, with social ownership nearing 300 million. Additionally, bike outputs exceeding CNY 1,000 are on the rise, with 2021's production hitting 33.7 million units. As e-bike prices drop, consumption in China is set to climb further.

Moreover, India, South Korea, and Japan are also projected to see significant growth. India's e-bike motor market is nascent, with many local players introducing varied products. For example, EMotorad unveiled an affordable e-bike range at EM Summit 2023 in January 2023. This model boasts a 250 W motor and 120 Nm torque.

Demand for e-bike motors is surging in tier-1 cities, evidenced by double-digit sales growth in recent years. Factors fueling this growth include heightened awareness of eco-friendly transport and government incentives for e-bike purchases. Given these dynamics, the e-bike motor market is set for continued expansion.

E-bike Motor Industry Overview

International and regional players, including TDCM Corporation Limited, Robert Bosch GmbH, Suzhou Xiongda Motor Co. Ltd, and

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Yamaha Motor Co. Ltd, dominate the e-bike motor market. Other notable players include Dapu Motors, Suzhou Bafang Electric Motor Science-Technology Co. Ltd, Panasonic Corporation of North America, TRANZX, Shimano Inc., NIDEC CORPORATION, and SPORTTECH Handels GmbH. Major e-bike motor manufacturers are launching innovative products to gain a competitive edge. For instance,

- In August 2023, Bosch unveiled its lightweight e-bike motor, the Bosch Performance SX. Designed for lightweight e-bikes, EMTB, gravel, and urban rides, this motor allows bike manufacturers to create more maneuverable and responsive e-bikes. Weighing in at just 4 kg for the combined battery and motor, the design emphasizes user benefits.
- In April 2023, Canadian e-bike leader Dost Bikes rolled out a stylish electric cargo bike. Capable of carrying up to 440 lb. (200 kg), the cargo e-bike offers versatile cargo options. Powering the e-bike is a 120Nm Bafang M600 mid-drive motor, complemented by a torque sensor and throttle functionality.
- In July 2023, Trek introduced the Fuel Exe Alloy electric mountain bike, a more affordable variant of its Fuel e-bike series. Unlike the original's carbon frame, this model boasts an aluminum frame. Equipped with the TQ silent HPR50 motor, the Fuel Exe Alloy offers a natural pedal feel and a 50Nm torque boost, ideal for mountain trails.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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