

E-Bike - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 250 pages | Mordor Intelligence

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Report description:

E-Bike Market Analysis

e-bike market size in 2026 is estimated at USD 39.42 billion, growing from 2025 value of USD 38.08 billion with 2031 projections showing USD 46.86 billion, growing at 3.52% CAGR over 2026-2031. The measured expansion reflects the transition from early adoption to mainstream use as corporate leasing schemes now give employees access to salary-sacrifice bikes. Demand is tilting toward premium models priced USD 3,500-5,999, the fastest-growing band, while targeted subsidies-France's EUR 4,000 (~USD 4,622) incentive and Poland's PLN 300 million (~USD 81 million) program-continue to widen the addressable base. Battery technology remains a cornerstone; lithium-ion captures a major share, yet sodium-ion and solid-state chemistries are lining up to ease China-centric raw-material risk.

Global E-Bike Market Trends and Insights

Urban Congestion Driving Micro-Mobility

Parking spaces in tier-1 cities cost as high as USD 30,000, making e-bikes a cost-efficient commute tool over 5-15 km trips-the distance that accounts for 40% of urban journeys. London's ULEZ expansion, plus GBP 7,000 (~USD 9,319) scrappage grants, has accelerated uptake among couriers, while companies such as Amazon and Google subsidize monthly e-bike subscriptions to ease parking stress and hit sustainability targets .

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Li-ion Battery Energy-Density and Cost Declines

Lithium-ion pack prices have declined significantly since 2010, moving 100+ km range bikes under the USD 2,000 mark. Fast-charge designs now reach 80% in 30 minutes, opening doors for high-utilization commercial fleets. Sodium-ion prototypes promise similar cycle life at 30% reduced cost, while solid-state roadmaps target 2x energy density by 2028.

Battery-Fire Incidents and Stricter Safety Norms

NYC recorded 187 e-mobility fires in 2023, lifting four-year costs to USD 518.6 million. California's SB 1271 and the UL 2849 standard now require certified packs, adding USD 200-500 per unit. Manufacturers are investing in thermal management and remote diagnostics to keep pace.

Other drivers and restraints analyzed in the detailed report include:

Government Incentives and Purchase Subsidies
Corporate Employee E-Bike Benefit Programs
High Upfront Cost vs. Conventional Bikes

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The market size for pedal-assist models reached a commanding 78.90% share in 2025, benefiting from favorable EU regulations that classify them as bicycles. Speed-pedelec variants, offering assistance up to 45 km/h, are charting a 4.02% CAGR as commuters seek car-like travel times in dense cities.

Manufacturers are layering AI algorithms onto motor controllers to optimize output by terrain and rider habits. Shimano's forthcoming automatic-shift drivetrain illustrates how suppliers bundle smart gearboxes with high-torque motors, strengthening their appeal among urban professionals.

City/urban bikes generated 76.05% of the market share in 2025 as urban riders opted for sweat-free commuting. Trekking/mountain models, however, are advancing at 3.65% CAGR, spurred by tour operators that now default to e-assisted fleets.

Operators see expanded demographics, older cyclists and mixed-fitness groups, as key growth levers. As trail access rules evolve, the segment is poised for further penetration into national parks and resort destinations.

Lithium-ion cells controlled 98.41% of the e-bike market share in 2025, underlining cost leadership and energy density. The "Others" bucket, housing sodium-ion and early solid-state prototypes, is growing at 4.32% CAGR as brands hedge raw-material exposure.

OEMs are dual-sourcing prismatic and cylindrical formats to mitigate China-centric processing. Should sodium-ion hit expected price parity by 2027, the chemistry could siphon double-digit share from legacy packs.

The Global E-Bike Market Report is Segmented by Propulsion Type (Pedal Assisted, Speed Pedelec, and More), Application Type (Cargo/Utility, City/Urban, and More), Battery Type (Lead Acid Battery, Lithium-Ion Battery, and More), Motor Placement (Hub (Front/Rear), Mid-Drive), Drive Systems, Motor Power, Price Band, Sales Channel, End Use, and Geography. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

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Geography Analysis

Europe retained 54.80% of the 2025 e-bike market revenue. Germany alone has 15.7 million units in circulation and sold 2.1 million in 2024, helped by salary-sacrifice programs covering several workers. The Netherlands shows saturation traits, with e-bikes normalized across age groups, while France's EUR 4,000 (~USD 4,622) low-income grant keeps funneling new buyers. Continuous path networks and bicycle-first urban planning remain Europe's durable competitive edge.

North America, though smaller today, is the quickest-growing region at 7.19% CAGR. State rebates of up to USD 1,750 in California and New York, alongside corporate stipends, are unlocking latent demand. Canada's CAD 400 million (~USD 286 million) infrastructure rollout links e-bike lanes to charging nodes, creating end-to-end fleets for commuters and delivery riders alike.

Asia-Pacific reflects a tapestry of conditions. China supplies a major share of e-bike imports in the United States and posted notable export receipts in 2024. India crossed a significant electric two-wheeler mark in 2024, though mopeds still outweigh pedal-assist formats. Japan and South Korea cater to premium, tech-heavy niches, while Australia leans on eco-tourism routes to lift trekking sales. Localized regulation and income profiles dictate tailored channel, price, and specification strategies.

List of Companies Covered in this Report:

Aima Technology Group Co., Ltd. Canyon Bicycles GmbH Fritzmeier Systems GmbH & Co. KG (M1 Sporttechnik) Giant Manufacturing Co., Ltd. Jiangsu Xinri E-Vehicle Co., Ltd. Luyuan Electric Vehicle Co., Ltd. Merida Industry Co., Ltd. Myvelo Co., Ltd. Rad Power Bikes Inc. Riese & Muller GmbH Pon Holdings B.V. Samchuly Bicycle Specialized Bicycle Components, Inc. Dongguan Tailing Electric Vehicle Co., Ltd. Tianjin Fuji-Ta Bicycle Co., Ltd. Trek Bicycle Corporation VanMoof BV Yadea Group Holdings Ltd. Yamaha Motor Co., Ltd.

Additional Benefits:

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

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