

E-Bike Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)
> ****Industry:**** Tires, Components & Aftermarket (Automotive & Transportation)
> ****Source:**** [<https://www.mordorintelligence.com/industry-reports/e-bike-market>]
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
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Base Market Size	USD 39.42 billion
Projected Forecast (2031)	USD 39.42 billion
Growth Rate (CAGR)	3.52 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

![Major players in E-Bike industry](images/chart_2.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 39.42 Billion |
Market Size (2031) | USD 46.86 Billion |
Growth Rate (2026 - 2031) | 3.52 % |
Fastest Growing Market | North America |
Largest Market | Europe |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

E-Bike Market Analysis by Mordor Intelligence

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.

Key Report Takeaways* By propulsion type, pedal-assist systems controlled 78.90% of the e-bike market share in 2025, whereas speed pedelecs are projected to log a 4.02% CAGR through 2031.

* By application type, city/urban models held 76.05% of the e-bike market share in 2025, while trekking/mountain variants are expected to record a 3.65% CAGR to 2031.

* By battery type, lithium-ion packs accounted for 98.41% of the e-bike market share in 2025; the other segment is positioned to grow at a 4.32% CAGR.

* By motor placement, hub drives secured a 64.60% of the e-bike market share in 2025, whereas mid-drive units are on course for a 4.93% CAGR.

* By drive system, chain drives led with 76.60% of the e-bike market share in 2025; belt drives are forecast to expand at a 5.19% CAGR.

* By motor power, sub-250 W models represented 58.45% of the e-bike market share in 2025, and 501-600 W units are tracking a 4.73% CAGR.

* By price band, bikes priced USD 1,000-1,499 captured 29.60% of the e-bike market share in 2025; the USD 3,500-5,999 band is projected to post a 5.55% CAGR.

* Offline stores still represented 72.40% of the e-bike market share in 2025, however online and subscription models are projected to grow at a 6.62% CAGR through 2031.

* By end use, personal and family purchases comprised 61.60% of the e-bike market share in 2025, while commercial delivery fleets are advancing at a 5.95% CAGR.

* By geography, Europe led with 54.80% of the e-bike market share in 2025; North America is set to witness the quickest 7.19% CAGR through 2031.

Key Market Trends

Market Trends and Insights
Drivers Impact Analysis of E-Bike Market*
 Driver I (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
 Urban Congestion Spurs Micro-Mobility | +0.8% | Global urban centers, strongest in Europe and Asia-Pacific | Long term (≥ 4 years) |
 Li-ion Energy Density and Cost Declines | +0.7% | Global manufacturing hubs led by Asia-Pacific | Short term (≤ 2 years) |
 Government Incentives and Purchase Subsidies | +0.6% | Europe, North America, selected Asia-Pacific markets | Medium term (2-4 years) |
 Corporate Employee Benefit Programs | +0.4% | Europe, North America, expanding in Asia-Pacific | Medium term (2-4 years) |
 Insurance Discounts for Cargo E-Bikes | +0.3% | Europe and North America commercial segments | Medium term (2-4 years) |
 Growth of E-Bike Tourism Routes | +0.2% | Europe, North America, select Asia-Pacific destinations | Long term (≥ 4 years) |
 Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The global e-bike arena remains moderately fragmented, with heritage bicycle brands, scale-driven Chinese producers, and digital-native start-ups all vying for share. Giant, Trek, and Specialized rely on long-standing dealer networks and tight Bosch or Shimano motor partnerships to defend premium ground, while leveraging integrated connectivity and over-the-air updates to lock in customers. Yadea, Aima, and other Chinese majors flood mid-range price tiers through vertically integrated plants that squeeze component costs and compress Western competitors' margins.

Component suppliers are strategic kingmakers. Shimano's entrenched drivetrain contracts give it leverage to steer OEM design choices, whereas Bosch faces entry friction despite strong mid-drive technology. Battery specialists are reshuffling as certified UL 2849 packs become compulsory in key U.S. states; the need for safety compliance favors well-capitalized vendors that can absorb testing fees and manage raw-material volatility. Hardware is increasingly inseparable from software, and firms that harmonize both layers gain stickier revenue streams.

Service-centric players add new wrinkles. Lease-a-Bike and Rybit target employers with turnkey leasing that bundles insurance, theft recovery, and maintenance, securing multi-year cash flows independent of one-time bike sales. Zoomo and other fleet-management vendors court gig-economy couriers with telematics dashboards that optimize uptime and route efficiency. As labor, marketing, and warranty costs rise, many smaller assemblers lack the scale or service muscle to stay competitive, suggesting continued consolidation and selective partnerships rather than a winner-take-all shake-out.

E-Bike Industry Leaders* Giant Manufacturing Co., Ltd.

* Yadea Group Holdings Ltd.

* Merida Industry Co., Ltd.

* Aima Technology Group Co., Ltd.

* Trek Bicycle Corporation

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global E-Bike Market Report Scope
Pedal Assisted, Speed Pedelec, Throttle Assisted are covered as segments by Propulsion Type. Cargo/Utility, City/Urban, Trekking are covered as segments by Application Type. Lead Acid Battery, Lithium-ion Battery, Others are covered as segments by Battery Type. Africa, Asia-Pacific, Europe, Middle East, North America, South America are covered as segments by Region.
By Propulsion Type
Pedal Assisted |
Speed Pedelec |
Throttle Assisted |

Segmentation Accordion Item

By Geography
North America | United States |
| Canada |
| Rest of North America |
South America | Argentina |
| Brazil |
| Rest of South America |
Europe | Germany |

- | United Kingdom |
- | France |
- | Italy |
- | Spain |
- | Netherlands |
- | Austria |
- | Sweden |
- | Switzerland |
- | Rest of Europe |
- Asia-Pacific | China |
- | India |
- | Japan |
- | South Korea |
- | Australia |
- | New Zealand |
- | Rest of Asia-Pacific |
- Middle East and Africa | Saudi Arabia |
- | United Arab Emirates |
- | South Africa |
- | Rest of the Middle East and Africa |

Frequently Asked Questions

What is the projected global e-bike market value by 2031?

It is expected to reach USD 46.86 billion, rising at a 3.52% CAGR from 2026.

Which region will grow fastest through 2031?

North America is slated for a 7.19% CAGR, spurred by state incentives and corporate leasing.

Which propulsion type dominates current sales?

Pedal-assist systems command 78.90% of 2025 revenue due to favorable regulations and natural ride feel.

How large is the commercial delivery opportunity?

Cargo fleets are advancing at a 5.95% CAGR, backed by city pilots that show 40% cost savings over vans.

Which battery chemistry leads today?

Lithium-ion holds 98.41% share, though sodium-ion and solid-state designs are emerging.