



THOUGHTS

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THE ELECTRIC MOTORCYCLE INDUSTRY: MARKET TRENDS, CORPORATE SUSTAINABILITY, AND ARCHITECTURAL EVOLUTION

The production of electric motorcycles today is in a phase of "painful maturation." Despite the global decarbonization trend, the industry has collided with reality: existing architectural solutions do not always meet consumer expectations regarding price and autonomy. Below is an analytical overview of the market, the state of key companies, and current technical approaches.

MARKET STATE AND SALES VOLUMES

The electric motorcycle market (L-category) demonstrates mixed dynamics. Following rapid growth in 2021–2022, 2023 and early 2024 showed some stagnation in the high-performance segment, while maintaining steady growth in the light urban transport sector.

USA: Leadership in the Premium Segment

The US market remains the largest for full-size electric motorcycles. **Volumes:** According to the *Motorcycle Industry Council (MIC)*, electric motorcycles account for about 1–2% of the total market (roughly 10,000–15,000 units annually for large models, excluding light e-bikes). **Trends:** Primary demand is concentrated in California and states with well-developed charging infrastructure. Buyers here are focused on "lifestyle" and dynamic performance rather than cost savings.

Southern Europe: The Center of Gravity for Electromobility

Southern Europe (Italy, Spain, France) is the largest market for two-wheeled transport in the EU. **Volumes:** According to data from *ACEM (European Association of Motorcycle Manufacturers)*, over 12,000 electric L-category vehicles were registered in Italy in 2023. In Spain, this figure was approximately 10,500 units. **Regional**

Specifics: Electric scooters (L1e/L3e) used for daily commuting dominate the Southern European market. The share of heavy electric motorcycles remains within 5–7% of the total EV volume.

CORPORATE SUSTAINABILITY AND THE MARKET LANDSCAPE.

The current status of key players highlights how difficult it is to maintain profitability in this segment. **Zero Motorcycles (USA):** The undisputed market leader with the widest dealer network. The company remains stable thanks to years of investments (over \$450 million) and strategic partnerships (e.g., with Polaris). However, even Zero faces the necessity of lowering prices to sustain demand. **LiveWire (Harley-Davidson):** The first public company in the segment (via SPAC). Despite its technological edge, LiveWire shows modest sales volumes (around 600–700 units per year), raising investor questions about the long-term sustainability of its business model. **Energica Motor Company (Italy):** One of the technological pioneers. After being acquired by the American fund Ideanomics, the company faced severe financial restructuring. This underscores the vulnerability of even the most advanced brands in the face of massive R&D costs. **CAKE (Sweden):** In February 2024, the company filed for bankruptcy. This was a shock to the industry and a clear indicator that "stylish design" without deep operational efficiency and scalability does not guarantee survival.

Summary and Conclusions

The electric motorcycle market has reached a threshold where "cosmetic" updates no longer work.

Key Trend for 2025–2026: A definitive shift from the marketing of "acceleration" to the marketing of "efficiency and resource durability." The winners will be the companies that offer an architecture capable of providing long-range capabilities (400+ km) while maintaining a reasonable weight and price. Achieving this requires a radical redesign of the traditional "battery–controller–motor" powertrain chain.

Data Sources: *European Association of Motorcycle Manufacturers (ACEM) - Annual Report 2023-2024. Motorcycle Industry Council (MIC) - US Market Statistics 2024. Statista - Electric Motorcycles Market Data 2024. BloombergNEF - EV Outlook. Press releases and financial reports from LiveWire (LVWR), Ideanomics (IDEX), and CAKE 0 emission AB.*

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