

The 2013 and 2014 USA Electric Bike Market Numbers Explained



With a population of more than 316 Million people, buying about 15 million normal bicycles most years, and a demographic that is shifting to an older, but active generation of baby boomers...the USA seems a natural market for electric powered two wheelers.

The European market, about 742 million people, buying about 20 million bicycles most years, is both larger, and buys fewer bicycles per capita than the USA.

However, much of Europe regards a bicycle of any type as transportation. (As well as for sports, fitness, and recreation.) This is a cultural norm and in such cultures ebike markets grow more quickly.

The USA is almost universal in regarding a bicycle as a device for sport, fitness, and recreation. For the USA, transportation is a car.

Transportation use of bicycles in the USA occurs in two general forms:

1. Low cost transport for people who cannot afford a car (or cannot drive due to a DUI conviction).
2. Transport in places where parking, and traffic congestion are problems – large cities like Boston, New York, San Francisco, etc.

Electric bicycles are transportation devices for almost all buyers. Yes, there are new models that may be contenders to replace or supplement mountain bikes, and there is fun and recreation in riding

about the gated community in Florida, or in the technical gadgetry of a new ebike. But for most ebike buyers, transportation is the primary intended use.

In the USA, transportation is usually an automobile. And cheap, used, cars are widely available. Adding to this cultural preference for autos is the resistance of the ordinary bicycle dealer who often has a background as an athlete, and regards electric bikes as “cheating”. As well as the dealer being aware that they are not well equipped to explain, support, and service such bikes. (The Light Electric Vehicle Association has an ongoing program to train electric bike technicians in the USA. www.LEVAssociation.com)

The result has been that the rate of growth of the USA electric bike market has disappointed many people.

The total sale of ebikes in the USA has been difficult to calculate. There has not been a uniform way to describe imports of ebikes in the US Customs records. There is no HS number assigned to electric bicycles, and so importers often choose between various 8700 series numbers in the “other” category, or declare the bikes as parts, or toys. Written descriptions vary widely: Ebike, electric bicycle, low speed electric assisted bicycle, pedelec, electric bicycle parts, and on and on.

eCycleElectric (www.eCycleElectric.com) and Electric Bicycles World Wide Reports, (www.EBWR.com) have worked on estimating the USA ebike market for about 19 years.

Methods used by eCE and EBWR have varied. Attempts to organize self-reporting by the industry were unsuccessful. And searches of customs records turned out to be a learning process as detective work uncovered a myriad of ways to be confused or misdirected about electric bike imports. Anecdotal reports were often inflated or deflated.

For the last three years, eCE has subscribed to Import Genius, a service that provides access to US Customs databases. We quickly learned that searches confined to HS numbers or to a few descriptions led to only part of the imports.

So we developed a list of all known brands, and known major suppliers to USA brands. And all the search terms that we could find that would yield results. We checked on consignee addresses, and tried to detect logistics companies and trading companies that were involved. We were surprised by the results, as it seems the USA buys more electric bikes than was generally believed by the industry.

Last year, we announced that the USA ebike market had roughly doubled to approximately 158,000 units imported in a 12-month period. We then endured a great deal of criticism from a variety of sources that stated we must be wrong. And observed a number of conflicting reports about the USA market size.

This is easy to understand – a casual search of import records would probably give the researcher the idea that only 60-80,000 units were imported during 2013. And this is often the result that we hear promoted. And for many of the USA electric bike brands, who have sales in the dozens to hundreds of units, it is hard to believe that so many ebikes are entering the USA.

So we checked our work. Carefully. And we found even more ebikes were imported than our original tally. We bought more services from Import Genius, looked again and compared, and then found even more bikes!

But we were aware that there was plenty of room for us to be in error since classification of the shipments was not exact, and under many descriptors.

So here is a detailed look at what we found:

Searching under electric bike, electric bicycle, electric bikes, electric bicycles, ebike, e-bikes we found: 136,943. es, we did adjust for duplications, which do exist.

Then there are the gray items with ambivalent descriptors. They could be toys, they could be scooters, but many of them are probably electric bikes. They came from OEMs that build ebikes, and the unit numbers compared to the weight of the shipment seem a lot like ebikes.

Next we took a look at the parts purchases of companies that assemble ebikes in the USA, from parts mostly imported from China. That group includes some companies that sell complete bikes, and some companies that sell DIY kits or just sell parts.

So we took the total weight of those parts and divided by 60 lbs, as we thought that 60 lbs of ebike parts was pretty close to one ebike, one way or another.

Total for vague descriptions and parts: 94,546

Raw total for USA market in 2013: 231,849

Now we know that we have accidentally included some units that are not ebikes. And we get accused of being too optimistic. And we want to be conservative. So we used an adjustment factor: 25%

reduction in the total to adjust for our possible mistakes. That gives us an adjusted total of 173, 886 units of ebikes imported into the USA or parts that were assembled into ebikes in 2013. (Yes, more than our original claim.)

We can be sure that not all of these sold through at retail. But since we are not hearing screams of anguish from the industry and we are not hearing about closeout sales to reduce inventory – it appears that there are no huge carry over inventories straining the system in the USA.

So what about 2014?

We are in the midst of studying 2014. But we have found more than 60,000 units imported so far. That may be off pace for a repeat of last year, but maybe not. We will release our results at the end of the year.

So, if the USA bought 173,886 electric bikes in 2013, where does that put us in comparison to other ebike markets?

We are in the top 10 nations, I think. And we are a very big country with a lot more room for the market to grow than any European nation, or Japan. Many factors are urging Americans towards more sustainable transportation, and ebikes are a vital part of our future – no matter how slowly they may be growing.

I foresee a day when the USA will be the third largest national market. And it is not far off.