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# Motorcycles:

## United Kingdom

May 2018



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# About This Report

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## Scope

This report forecasts to 2022 UK motorcycle demand and production in units as well as total demand in nominal US dollars at the manufacturer level. Total demand in volume terms is segmented by product in terms of:

- ICE medium and heavy motorcycles
- ICE light motorcycles
- ICE scooters, mopeds, and motorbikes
- electric

To illustrate historical trends, total demand by volume is provided in annual series from 2007 to 2017; total production by volume, total demand by value, and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

In addition to two-wheeled vehicles, trikes (three-wheeled motorcycles) are included in the report numbers. Three-wheeled motorcycles include sidecar motorcycles, which are two-wheeled motorcycles with an attached one-wheel sidecar and traditional or purpose-built motorcycles used for recreational purposes that are fitted with a two-wheeled axle in either the front or rear. Excluded from the scope of this report are separately sold sidecars; three-wheeled auto rickshaws or truck-like “three-wheelers” produced in India, China, and other emerging markets that are used principally for business purposes; and utility vehicles, such as all-terrain vehicles, utility task vehicles, autocycles, and motor vehicle/motorcycle hybrids.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2017.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Motorcycles: United Kingdom* (FB85016) is based on [Global Motorcycles](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers

## About This Report

- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 6 | HS Codes Related to Motorcycles

HS Codes	
Harmonized System Code	
871110	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, with reciprocating internal combustion piston engine not exceeding 50-cc, with or without side-cars; side-cars
871120	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, reciprocating internal combustion piston engine, of cylinder capacity exceeding 50-cc but not exceeding 250-cc; with or without side-cars; side-cars
871130	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, reciprocating internal combustion piston engine, of cylinder capacity exceeding 250-cc but not exceeding 500-cc, with or without side-cars; side-cars
871140	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, reciprocating internal combustion piston engine of cylinder capacity exceeding 500-cc but not exceeding 800-cc, with or without side-cars; side-cars
871150	Motorcycles (including mopeds) and cycles; fitted with auxiliary motor, with reciprocating internal combustion piston engine of a cylinder capacity exceeding 800-cc, with or without side-cars; side-cars
871160	Motorcycles (including mopeds) and cycles; fitted with auxiliary motor, with electric motor for propulsion, with or without side-cars; side-cars
871190	Motorcycles (including mopeds) and cycles; n.e.c. in heading no. 8711, fitted with auxiliary motor, with or without side-cars; side-cars

Source: United Nations Statistics Division

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available,

## About This Report

we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Motorcycles*, May 2018

### Freedonia Industry Studies

*Global Batteries*, June 2018

*Global Hybrid & Electric Vehicles*, May 2018

*Recreational Vehicles in the US*, April 2018

*Recreational Boating in the US*, March 2018

*Global Automotive Lubricants*, December 2017

*Global Internal Combustion Engine & Related Filters Market*, January 2017

*Battery Markets in the US*, December 2016

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*Bicycles: United States*

*Global Light Vehicles*

*Industrial Rubber Products: United Kingdom*

*Motor Vehicle Biofuels: United States*

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*Transport Equipment: United States*

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### Trade Publications

*Automotive Industries*

*Bike*

*Bike Europe*

*V World*

*Motor Cycle News*

*WardsAuto*

### Agencies & Associations

British Motorcyclists Federation

European Committee for Standardization

European Association of Motorcycle Manufacturers

European Association of Internal Combustion Engine Manufacturers

Motorcycle Industry Association

United Nations Comtrade

United Kingdom Department for Transport

Driver and Vehicle Licensing Agency