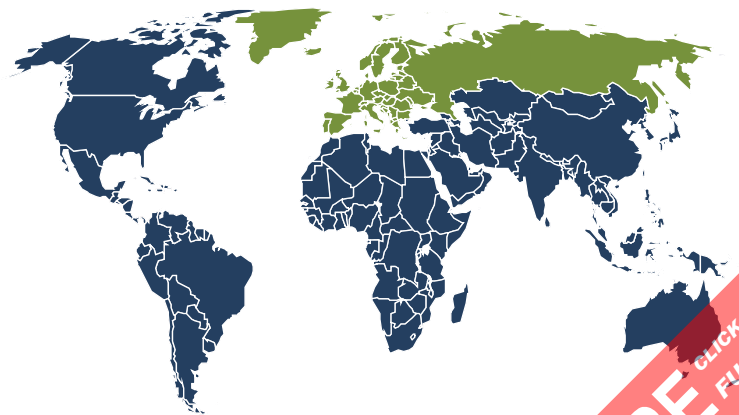




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Motorcycles: Europe

May 2020



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Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
COVID-19 Pandemic Impact	7
Legal & Regulatory Factors	9
Technology Trends	12
Demand by Country	13
3. Segmentation & Forecasts	15
Products	15
Electric	17
ICE Scooters, Mopeds, & Motorbikes	18
ICE Medium & Heavy	19
ICE Light	20
Production & Trade	22
4. Industry Structure	25
Industry Characteristics	25
Market Leaders	26
Accell Group	27
BMW Motorrad	27
Piaggio	28
5. About This Report	30
Scope	30
Sources	31
Industry Codes	32
Freedonia Methodology	32
Resources	34

List of Tables & Figures

Figure 1 Europe: Key Trends in the Motorcycle Market, 2019 – 2024	3
Figure 2 Europe: Motorcycle Demand Trends, 2009 – 2019	4
Table 1 Europe: Key Indicators for Motorcycle Demand, 2009 – 2024 (2018US\$ bil)	6
Figure 3 Europe: Motorcycle Demand by Country, 2019 (%)	13
Figure 4 Europe: Motorcycle Demand by Product, 2009 – 2024 (000 units)	15
Table 2 Europe: Motorcycle Demand by Product, 2009 – 2024 (000 units)	15
Figure 5 Europe: Motorcycle Demand by Product, 2009 – 2024 (%)	21
Table 3 Europe: Motorcycle Supply & Demand, 2009 – 2024 (000 units)	23
Table 4 Europe: Selected Suppliers to the Motorcycle Market	29
Table 5 Countries in Western Europe	31
Table 6 Countries in Eastern Europe	31
Table 7 HS Codes Related to Motorcycles	32
Table 8 NACE Codes Related to Motorcycles	32

About This Report

Scope

This report forecasts to 2024 motorcycle demand and production in units in Europe. Total demand is segmented by product in terms of:

- electric
- internal combustion engine (ICE) scooters, mopeds, and motorbikes
- ICE medium and heavy
- ICE light

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; production and the various segments are reported at five-year intervals for 2009, 2014, and 2019.

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
- 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
- utility vehicles, such as all-terrain vehicles, utility task vehicles, autocycles, and motor vehicle/motorcycle hybrids

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.

For the purposes of this report, Europe encompasses the following countries:

About This Report

Table 5 | Countries in Western Europe

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium	Greenland	Luxembourg	Spain*
Channel Islands	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City
Germany*	Italy*	Portugal	

*major motorcycle markets

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

Source: The Freedonia Group

Sources

Motorcycles: Europe (FE85016) 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, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and 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

About This Report

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

Industry Codes

Table 7 | HS Codes Related to Motorcycles

HS Code	Definition
8711.10	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
8711.20	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
8711.30	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
8711.40	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
8711.50	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
8711.60	Motorcycles (including mopeds) and cycles; fitted with auxiliary motor, with electric motor for propulsion, with or without side-cars; side-cars
8711.90	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

Table 8 | NACE Codes Related to Motorcycles

NACE Code	Definition
30.91	Manufacture of motorcycles
30.92	Manufacture of bicycles and invalid carriages

Source: European Commission

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,

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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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Freedonia Industry Studies

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Global Bearings

Global Buses

Global Diesel Engines

Global E-Bikes

Global Filters

Global Hybrid & Electric Vehicles

Global Industrial Fasteners

Global Industrial Rubber Products Market

Global Off-Road Equipment Technology 2020

Global Tires

Industrial Fasteners

Lubricants in the US

Recreational Vehicles in the US

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COVID-19 Market Impact Analysis

Bicycles: United States

Buses: United States

E-Commerce: United States

Filters: United Kingdom

Global Demographics

Global Light Vehicles

Global Macroeconomy

Global Medium- & Heavy-Duty Trucks & Buses

Hybrid & Electric Vehicles: United Kingdom

Industrial Rubber Products: United Kingdom

Motor Vehicles: United States

Tires: United Kingdom

Transport Equipment: United States

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Trade Publications

Automotive Industries

Automotive News

About This Report

Bike Europe

Cycle World

EV World

Mobile World

Motorcycle & Powersports News

Powersports Business

WardsAuto

webBikeWorld

Agencies & Associations

Associazione Nazionale Ciclo Motociclo Accessori è l'Associazione (ANCMA)

ASTM International

European Association of Motorcycle Manufacturers (ACEM)

Eurostat

International Monetary Fund

Motorcycle Industry Association

Motorcycle Industry Council

Organisation for Economic Co-Operation and Development

United Nations Comtrade

World Bank

World Customs Organization