



World Motorcycles

(including Electric Bicycles & Mopeds)

Industry Study with Forecasts for **2013 & 2018**

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Economic Performance.....	5
World Economic Outlook	8
World Demographic Overview	11
Population.....	11
Urban Population	14
Households.....	15
World Personal Income Trends	17
World Bicycle Market Trends.....	19
World Light Vehicle Overview	22
Production.....	22
Demand	25
Legal & Regulatory Issues	28
Restrictions on Motorcycle Use	28
Rider Safety	29
Exhaust Emissions	30
Pricing Patterns	32
Technological Trends	34

WORLD SUPPLY & DEMAND

General	37
2 Market Models: Developed Versus Emerging... 38	
Historical Context: Japan in the 1950s.....	39
Forecast Model Inputs	42
Income Distribution.....	42
Age & Demographics.....	44
Climate.....	45
Safety	46
Other Factors.....	47
Model Fit & Implementation	49
Regional Overview.....	51
Demand	52
Motorcycles in Use.....	59
Production.....	61
International Trade	64
Demand by Type	66
Internal Combustion Engine	69
Scooters, Mopeds & Motorbikes	72
Light Motorcycles	73
Medium/Heavy Motorcycles.....	74
Electric	76
Bicycles & Mopeds.....	79
Scooters & Other.....	81

NORTH AMERICA

North America	83
Motorcycle Supply & Demand.....	84
Motorcycle Outlook & Suppliers.....	86
United States	88

Canada	94
Mexico	100

WESTERN EUROPE

Western Europe.....	106
Motorcycle Supply & Demand.....	107
Motorcycle Outlook & Suppliers.....	110
Italy	113
France.....	119
Germany	125
Spain	131
United Kingdom.....	136
Other Western Europe	141

ASIA/PACIFIC

Asia/Pacific.....	147
Motorcycle Supply & Demand.....	149
Motorcycle Outlook & Suppliers.....	151
China	154
India	162
Indonesia	168
Vietnam.....	174
Thailand	180
Taiwan	186
Japan.....	192
Philippines	200
Malaysia	205
South Korea	210
Other Asia/Pacific	216

OTHER REGIONS

Latin America.....	223
Brazil.....	229
Argentina	235
Other Latin America	241
Eastern Europe	247
Africa/Mideast.....	253
Nigeria.....	259
Other Africa/Mideast.....	266

INDUSTRY STRUCTURE

General	273
Industry Composition	274
Market Share	276
Competitive Strategies.....	279
Industry Globalization Trends.....	281
Research & New Product Development.....	283
Manufacturing	284
Marketing & Distribution	287
Cooperative Agreements.....	289
Mergers & Acquisitions.....	295

COMPANY PROFILES

Bajaj Auto	299
Bayerische Motoren Werke.....	302

Big Dog Motorcycles	304
China Jialing Industrial.....	305
Chongqing Jianshe Motorcycle	307
Chongqing Lifan Industry Group	309
Chongqing Loncin Industry Group	310
Dachangjiang Group	311
Daelim Industrial	312
Dafra da Amazonia Industria e Comercio de Motocicletas Limitada.....	313
Ducati Motor	314
Eicher Motors	315
Giant Manufacturing	317
Guangzhou Haojin Group.....	318
Guangzhou Motors Group.....	319
Guangzhou Tianma Group Tianma Motorcycle	320
Harley-Davidson Incorporated	321
Honda Motor	325
Hong Leong Industries Berhad	330
Jinan Qingqi Motorcycle.....	332
Jincheng Corporation.....	333
Kawasaki Heavy Industries.....	335
KTM Power Sports AG.....	338
Kwang Yang Motor.....	340
Luoyang Northern Enterprises	342
MALAGUTI SpA	344
Peugeot SA	345
Piaggio & Company	347
Polaris Industries	350
S&T Motors	352
Sanyang Industry.....	353
Suzuki Motor.....	354
Triumph Motorcycles.....	358
TVS Motor	359
Yamaha Motor	361
Zhejiang Qianjiang Motorcycle.....	368
Zongshen Industrial Group.....	370
Other Companies Mentioned in Study	372

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region	13
3 Median Age of Population by Region	14
4 World Urban Population by Region	15
5 World Households by Region	17
6 World Per Capita GDP by Region.....	19
7 World Bicycle Demand by Region	21
8 World Light Vehicle Production by Region ..	25
9 World Light Vehicle Demand by Region	27
10 Sales-Weighted Motorcycle Manufacturer Pricing	34

(continued on next page)

List of Tables/Charts

(continued from previous page)

WORLD SUPPLY & DEMAND

Cht Motorcycle Versus Passenger Car Sales Trends in Japan, 1950 to 2000.....	40
Cht Ratio of Motorcycle to Passenger Car Sales in Japan, 1950 to 2000	41
Cht Relationship of Per Capita GDP to Relative Motorcycle Sales Dominance in Japan, 1950 to 1970	42
Cht Relationship of Income Distribution to Per Capita GDP, 2008	43
Cht Median Age of Population in Selected Countries, 2008.....	45
Cht US Motorcyclist Accident Fatalities & Fatality Rate, 1998 to 2008.....	46
Cht US Motorcyclist Traffic Fatalities by Age Group, 1998 & 2007	47
Cht Comparison of Per Capita GDP & Motorcycle Dominance.....	49
Cht Typical Motorcycle Market Transition Point - Selected Countries, 2008	51
1 World Motorcycle Unit Demand by Region	54
2 World Motorcycle Value Demand by Region	56
Cht World Motorcycle Demand by Region, 2008	57
Cht Additional Motorcycle Demand, 2013 Versus 2008	57
Cht World Motorcycle Demand in Units - Projected 2008-2013 Annual Rate of Growth.....	58
3 World Motorcycles in Use by Region	60
Cht World Motorcycles in Use by Region, 2008	61
4 World Motorcycle Production by Region.....	63
Cht World Motorcycle Production by Region, 2008	63
5 World Motorcycle Net Exports by Region ..	65
6 World Motorcycle Demand by Engine Type	68
Cht World Motorcycle Demand by Engine Type	69
7 World Internal Combustion Engine Motorcycle Demand by Type & Region ..	71
Cht World Internal Combustion Engine Motorcycle Demand by Type.....	72
8 World Electric Motorcycle Demand by Type & Region.....	78
Cht World Electric Motorcycle Demand by Type	79

NORTH AMERICA

1 North America - Motorcycle Supply & Demand.....	85
---	----

Cht North America - Motorcycle Demand by Country, 2008	86
2 North America - Motorcycle Demand by Type	88
3 United States - Motorcycle Supply & Demand.....	91
4 United States - Motorcycle Demand by Type	94
5 Canada - Motorcycle Supply & Demand.....	97
6 Canada - Motorcycle Demand by Type	100
7 Mexico - Motorcycle Supply & Demand... ..	103
8 Mexico - Motorcycle Demand by Type.....	105

WESTERN EUROPE

1 Western Europe - Motorcycle Supply & Demand.....	109
Cht Western Europe - Motorcycle Demand by Country, 2008	110
2 Western Europe - Motorcycle Demand by Type	113
3 Italy - Motorcycle Supply & Demand.....	116
4 Italy - Motorcycle Demand by Type.....	119
5 France - Motorcycle Supply & Demand ..	122
6 France - Motorcycle Demand by Type	125
7 Germany - Motorcycle Supply & Demand.	128
8 Germany - Motorcycle Demand by Type ..	130
9 Spain - Motorcycle Supply & Demand.....	133
10 Spain - Motorcycle Demand by Type	135
11 United Kingdom - Motorcycle Supply & Demand.....	138
12 United Kingdom - Motorcycle Demand by Type	140
13 Other Western Europe - Motorcycle Supply & Demand.....	143
14 Other Western Europe - Motorcycle Demand by Type	146

ASIA/PACIFIC

1 Asia/Pacific - Motorcycle Supply & Demand.....	150
Cht Asia/Pacific- Motorcycle Demand by Country, 2008	151
2 Asia/Pacific - Motorcycle Demand by Type	154
3 China - Motorcycle Supply & Demand.....	158
4 China - Motorcycle Demand by Type	162
5 India - Motorcycle Supply & Demand	165
6 India - Motorcycle Demand by Type.....	168
7 Indonesia - Motorcycle Supply & Demand.....	171
8 Indonesia - Motorcycle Demand by Type.	174
9 Vietnam - Motorcycle Supply & Demand .	177
10 Vietnam - Motorcycle Demand by Type... ..	180
11 Thailand - Motorcycle Supply & Demand.	183
12 Thailand - Motorcycle Demand by Type ..	186
13 Taiwan - Motorcycle Supply & Demand... ..	189
14 Taiwan - Motorcycle Demand by Type.....	192
15 Japan - Motorcycle Supply & Demand	196

16 Japan - Motorcycle Demand by Type	199
17 Philippines - Motorcycle Supply & Demand.....	202
18 Philippines - Motorcycle Demand by Type	204
19 Malaysia - Motorcycle Supply & Demand.	207
20 Malaysia - Motorcycle Demand by Type ..	210
21 South Korea - Motorcycle Supply & Demand.....	213
22 South Korea - Motorcycle Demand by Type	216
23 Other Asia/Pacific - Motorcycle Supply & Demand.....	219
24 Other Asia/Pacific - Motorcycle Demand by Type	222

OTHER REGIONS

1 Latin America - Motorcycle Supply & Demand.....	226
2 Latin America - Motorcycle Demand by Type	229
3 Brazil - Motorcycle Supply & Demand.....	232
4 Brazil - Motorcycle Demand by Type	235
5 Argentina - Motorcycle Supply & Demand.....	238
6 Argentina - Motorcycle Demand by Type.	241
7 Other Latin America - Motorcycle Supply & Demand.....	244
8 Other Latin America - Motorcycle Demand by Type	247
9 Eastern Europe - Motorcycle Supply & Demand.....	250
10 Eastern Europe - Motorcycle Demand by Type	253
11 Africa/Mideast - Motorcycle Supply & Demand.....	256
12 Africa/Mideast - Motorcycle Demand by Type	259
13 Nigeria - Motorcycle Supply & Demand... ..	263
14 Nigeria - Motorcycle Demand by Type	266
15 Other Africa/Mideast - Motorcycle Supply & Demand.....	269
16 Other Africa/Mideast - Motorcycle Demand by Type	272

INDUSTRY STRUCTURE

1 Motorcycle Sales for Selected Manufacturers, 2008.....	275
Cht World Motorcycle Market Share, 2008.....	276
Cht Profitability Trends - Global Versus Regional Players, 1998 to 2008.....	280
Cht Honda Motorcycle Business World Sales Distribution, 2008.....	282
Cht World Motorcycle Industry Breakdown by Units, Revenues & Profits, 2008	283
Cht World Motorcycle Industry Minimum	
Cht Efficient Scale Analysis, 2008.....	286
2 Selected Cooperative Agreements.....	290
3 Selected Acquisitions & Divestitures.....	297

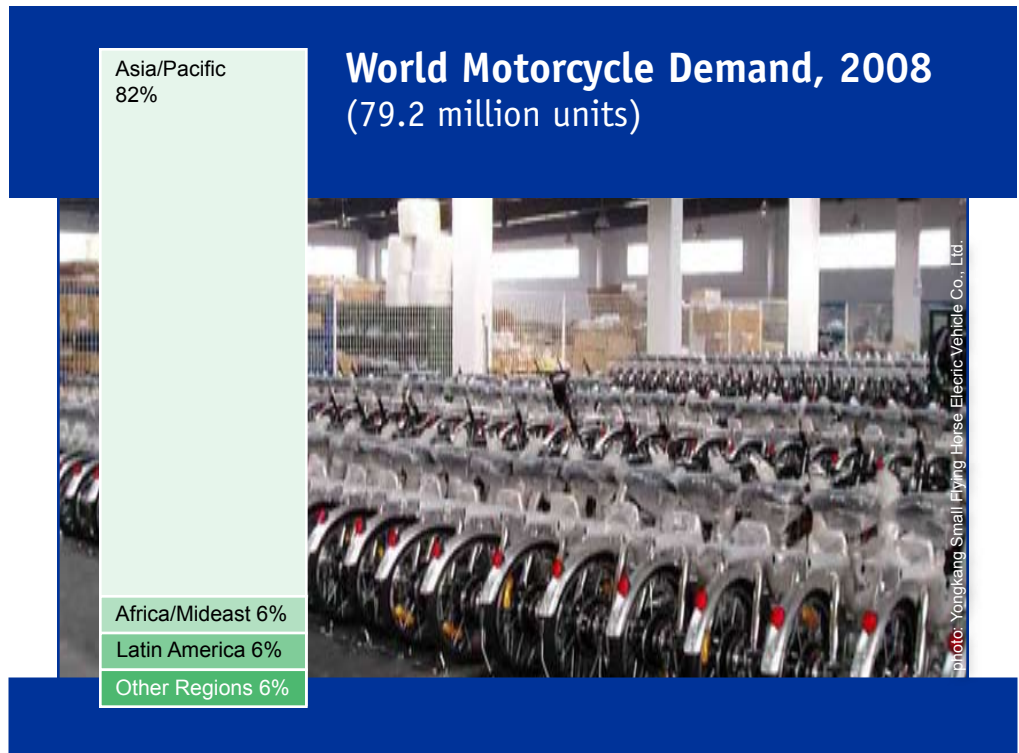
Gains will be spurred by rising standards of living in developing parts of the world, which are making motorcycles a more affordable alternative to walking, bicycling or using mass transit.

Global demand to increase 7.6% yearly through 2013

Global demand for motorcycles, including electric bicycles and mopeds, is forecast to increase 7.6 percent per year through 2013, spurred by rising standards of living in developing parts of the world, which are making motorcycles a more affordable alternative to walking, bicycling or using mass transit. Sales value will expand at a slower pace, climbing 7.2 percent annually through 2013, because of an expected decline in sales-weighted prices due to fast market growth in low priced electric motorcycles and smaller internal combustion engine (ICE) motorcycles. Some offsetting support will be provided by the introduction of new models and increased sales of machines with more features.

Electric motorcycles to register strongest advances

Electric motorcycles, which are extremely popular in China but account for a minimal share of demand in most other parts of the world, will register the strongest market advances. Sales of battery-powered bicycles, scooters and other two-wheelers will be driven by their generally lower purchase prices, low cost of operation and lack of harmful emissions. However, ICE motorcycles will continue to account for more than 95 percent of all demand outside of China in 2013. ICEs are a proven, widely accepted motorcycle power plant technology. ICE motorcycles can also travel further before needing to be refueled,



and larger ICE models are more powerful than most currently available electric motorcycles. Light motorcycles -- which offer greater power and better performance than scooters, mopeds and motorbikes, but have lower price tags and are less expensive to operate than medium and heavy motorcycles -- will outperform other ICE product types and maintain their position as the largest single segment of the motorcycle market.

Africa, Asia to be fastest growing regional markets

The strongest sales advances through 2013 will be registered in the Africa/Mideast region. This will be due to

several factors, including the fastest population growth of any region, the lowest median age and the lowest (but climbing) per capita GDP. Population increases and higher standards of living will also help stimulate demand in the Asia/Pacific region, which will post the second strongest gains, followed by Eastern Europe (rising from a very small current market base) and Latin America. China alone will account for 55 percent of all additional sales through 2013, spurred by very strong electric motorcycle demand and solidifying its position as the biggest national motorcycle market. Growth is also expected to be healthy in Indonesia and lower-volume markets like Nigeria, the Philippines and Vietnam.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

India: Motorcycle Outlook & Suppliers

India's motorcycle production will increase at a 6.8 percent rate to 11.7 million units in 2013, trailing the Asia/Pacific region. This will be due to additional investment in production facilities, output gains and resulting in a trade surplus in motorcycles. Royal Enfield announced plans to increase production by over 35 percent by 2010. This will counterbalance, preventing local production from rising at a

**SAMPLE
 TEXT**

The market for motorcycles in India is forecast to climb annually through 2013 to 10.2 million units, moderating from the 2003-2008 period and continuing to lag product sales. Product demand will increase at a faster 8.2 percent annual rate to \$5.4 billion in 2013, as light motorcycles continue to take market share away from less expensive scooters, mopeds and mopeds, raising sales-weighted product prices. Advances will be supported by ongoing economic, personal income, population and household income. However, strong competition from other means of personal transportation (light vehicles, mass transit systems, three-wheelers, etc.) and traffic accident rates will limit market gains through 2013. For instance, Tata began deliveries of the NANO automobile, which has a starting price of only \$2,500, putting it within the financial reach of many consumers who might otherwise buy a motorcycle.

In contrast to China, electric models account for a modest share of total motorcycle sales in India. Demand for electric motorcycles in the country will more than double through 2013, largely due to their generally lower purchase and operating costs, but they will still represent only about two percent of all unit demand. Light ICE motorcycles, which represented four-fifths of the Indian sales total in 2008, will continue to

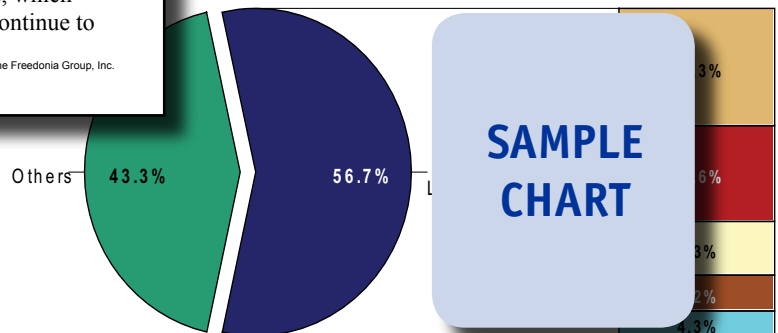
**TABLE VI-5
 INDIA
 MOTORCYCLE SUPPLY & DEMAND**

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2007\$)	100	150	200	250	300
per capita GDP	1000	1500	2000	2500	3000
Population (million persons)	1000	1100	1200	1300	1400
Light Vehicle Demand (000) light vehicles/000 persons	100	110	120	130	140
Bicycle Demand (000) bicycles/000 persons	100	110	120	130	140
motorcycles/000 persons	100	110	120	130	140
motorcycles/light vehicle	100	110	120	130	140
motorcycles/bicycle	100	110	120	130	140
Motorcycle Demand (000)	100	110	120	130	140
+ net exports & sales from inventory	100	110	120	130	140
Motorcycle Production (000)	100	110	120	130	140
motorcycles in use/demand	100	110	120	130	140
Motorcycles in Use (000 units)	295	350	400	450	500

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD MOTORCYCLE MARKET SHARE, 2008
 (\$47.1 billion)**



**SAMPLE
 CHART**

**Sample Profile,
 Table & Forecast**

TABLE VI-6
INDIA MOTORCYCLE DEMAND BY TYPE
 (thousand units)

Item	1998	2003	2008	2013	2018
Asia/Pacific Motorcycle Demand	17,000	23,000	28,000	33,000	38,000
% India	17	23	28	33	38
India Motorcycle Demand					
Internal Combustion Engine					
Scooters, Mopeds & Motorbikes					
Light Motorcycles					
Medium & Heavy Motorcycles					
Electric					
\$/motorcycle					
India Motorcycle Demand (mil \$)					
% India					
A/P Motorcycle Demand (mil \$)	7950	13400	23650	39400	57100



COMPANY PROFILES

Guangzhou Tianma Group Tianma Motorcycle Com
 Number 3, CongZhang Road
 Conghua, Guangzhou, Guangdong 510925
 China
 86-20-8798-2688
 http://www.ktm

Annual Sales: :
 Employment: 1

Key Products: : motorcycles;
 scooters; and n

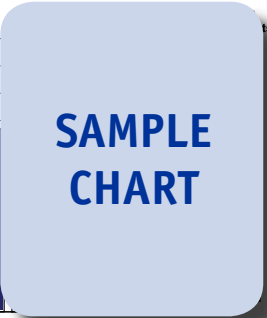
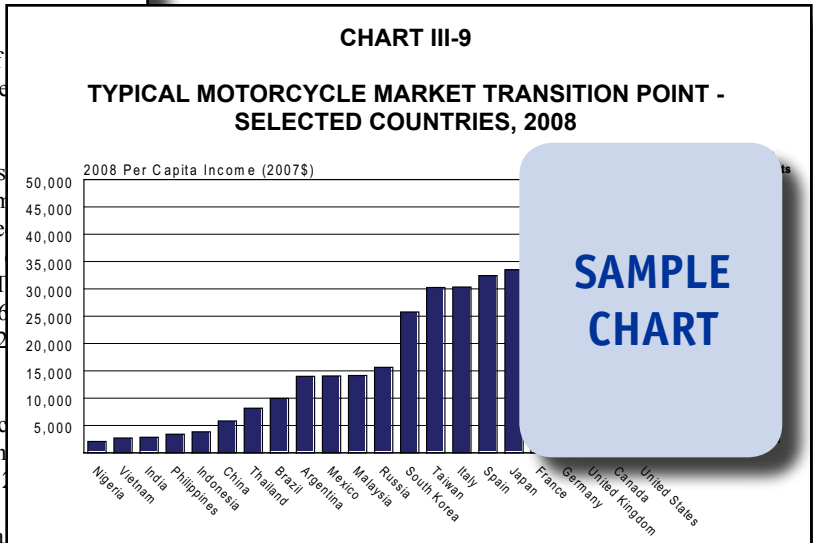
Guangzhou...er of
 cycles and motorcycle engines under the TIANMA brand name
 Company is a non-governmental township enterprise.

The Company's motorcycles include sport, dirt bike, cruis
 touring, cub-style and scooter product lines. Guangzhou Tianma
 Group's sport, dirt bike, cruising and touring motorcycles are e
 with engines that have displacements ranging from 100 to 250
 centimeters (cc). Specific bikes include YB100, TM 125 and T
 26 sport; TM150GY dirt bike; TM150, TM125-5 and TM125-6
 ing; and TM250-6, TM150-5, TM150-4, TM125-5, TM 125-12
 TM125-18 touring models.

Guangzhou Tianma Group makes 110 cc cub-style motorc
 It's scooters have engines ranging from 50 to 125 cc. Guangzh
 Tianma Group's motorcycle engines range in size from 97 to 12

Manufacturing activities take place at Guangzhou Tianma
 300,000-square-meter plant in Guangzhou, Guangdong. The facility

166



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OTHER STUDIES

World Light-Duty Green Vehicles

Global "green" vehicle demand will grow rapidly through 2013, driven by government subsidies, technology breakthroughs and erratic oil prices. North America will remain the largest and fastest growing market. Conventional hybrid-electric vehicles will surpass natural gas types to become the most commonly sold. This study analyzes the 1.8 million unit world green vehicle industry, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates market share and profiles industry players.

#2510 08/2009..... \$5700

Motorcycles in China

Demand for motorcycles in China will grow 13.9% annually through 2011. Gains will be spurred by a meteoric rise in electric motorcycles, which are much less costly than gas types, are less regulated and are a popular upgrade from bicycles for urban consumers. The Northeast will see the fastest regional demand growth. This study analyzes the 23.2 million unit motorcycle industry in China, with forecasts for 2011 and 2016 by type, market and region. It also evaluates market share and profiles participating companies.

#2320 05/2008..... \$5100

Medium- & Heavy-Duty Truck Aftermarket

The US aftermarket for medium- and heavy-duty (MD/HD) truck parts will grow 3.8% annually through 2013. Exterior and structural components such as tires will remain the largest segment, while electrical and electronic components see the fastest gains. Outsourced service providers will continue to dominate, led by tire dealers. This study analyzes the \$14.2 billion US MD/HD aftermarket, with forecasts for 2013 and 2018 by product and service performer. It also evaluates market share and profiles industry players.

#2481 04/2009..... \$4600

World Power Lawn & Garden Equipment

Global demand for power lawn and garden equipment will expand 2.8% annually through 2013. The bedrock US market will provide the best opportunities based in part on improved products such as cordless electric models. North America and Western Europe will remain the dominant markets. This study analyzes the \$16.1 billion world power lawn and garden equipment industry, with forecasts for 2013 and 2018 by product, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2542 08/2009..... \$5800

World Buses

Global bus demand will rise 5% yearly through 2012. Gains will be driven by high fuel prices, which will boost bus ridership and prompt bus fleet expansions and upgrades to more efficient vehicles. China is the largest market for and producer of buses, and will be the biggest driver of demand going forward. This study analyzes the 324,000 unit world bus market, with forecasts for 2012 and 2017 by type, world region and for 19 countries. It also evaluates company market share and profiles industry competitors.

#2366 07/2008..... \$5600

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