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World Motorcycles

Industry Study with Forecasts for **2016 & 2021**

Study #2972 | January 2013 | \$6300 | 429 pages



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The Asia/Pacific region, which predominantly utilizes small and inexpensive motorcycles, will continue to dominate worldwide demand, representing 84 percent of all units sold in 2016.

World demand to rise 7.2% annually through 2016

The global market for motorcycles, including electrically-powered machines, is forecast to expand 7.2 percent annually to 134.5 million units in 2016, when industry revenues will reach \$90 billion. The Asia/Pacific region, which predominantly utilizes small and inexpensive motorcycles, will continue to dominate worldwide demand, representing 84 percent of all units sold in 2016. However, the growth rate in this region will be slower than in North America, the Africa/Mideast region, and Eastern Europe due to the sheer volume of motorcycle demand in Asia.

World sales of motorcycles will be stimulated by rising standards of living in developing nations. China will remain by far the largest national market, with India and Indonesia also important based on large populations with the means to purchase inexpensive motorcycles. There is a strong correlation between average income levels and motorcycle demand up to a certain point. In emerging economies where motorcycles are an attractive alternative to walking, riding a bicycle, or utilizing mass transit, strong growth in motorcycle sales is triggered once certain per capita income thresholds have been reached.

Due to the superior fuel efficiency these machines provide compared to automobiles and other light vehicles, motorcycle demand gains will also be supported by higher petroleum costs. Furthermore, a

World Motorcycle Demand, 2016 (134.5 million units)



China
43%

India
16%

Indonesia 9%

Other Asia/Pacific
16%

Other Regions
16%

rebound from the 2007-2009 recession in developed countries like the US will lead to higher product sales, particularly of medium and heavy motorcycles, as economic conditions become more favorable and consumers resume purchasing these expensive recreational items.

Light motorcycles to remain largest ICE segment

Light motorcycles will remain the single largest internal combustion engine (ICE) product segment in unit terms because they offer a mix of the best attributes of smaller (lower cost) and larger displacement models (more power). ICE scooters, mopeds, and motorbikes will

comprise approximately one-third of total product sales in 2016, supported by their low cost and easy maneuverability in congested urban areas.

Sales of electric bicycles (e-bikes) and electric motorcycles (e-cycles) are expected to grow roughly in line with ICE motorcycle demand through 2016, a deceleration from the 2006-2011 pace due to the large existing stock in China, where these products are most popular. In 2016, the country will account for nearly nine-tenths of the world e-bike and e-cycle sales total. In most other parts of the world, they will remain niche products that make up a relatively small share of motorcycle demand.

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Sample Text, Table & Chart

ASIA/PACIFIC

Indonesia: Motorcycle Outlook & Suppliers

The market for motorcycles in Indonesia is projected to grow from 22 million units, decelerating from the 2009-2011 period, but still expected to climb even faster than the rest of the region in 2016 as a shift in consumer preferences toward more powerful light motorcycles and electric motorcycles. The nation is projected to be the largest motorcycle market outside of Asia/Pacific in 2016, according to the forecast model outlined in this study, and product demand will rise along with output and per capita income. Additionally, the country's young population (28 in 2011), relatively equitable income distribution, and favorable climate will all help support gains.

Indonesian sales of e-bikes and e-cycles will increase faster than those of any other product type through 2016, more than doubling in unit terms. However, these machines will remain niche products, despite their relatively low price and operating costs, due to concerns about product quality, limited range, and length of time required to recharge the battery. Demand for light ICE motorcycles will grow slower than that for electric motorcycles, but they will remain the most popular type of motorcycle, accounting for 82 percent of overall demand in 2016. Product sales will be bolstered by the introduction of new models.

The next fastest gains will be registered by ICE scooters, mopeds, and motorbikes. Demand for these products will be driven by their small size, which allows for easier mobility through the crowded streets of major urban areas. However, consumers' willingness to replace older motorcycles with more powerful light vehicles or more cost-efficient electric motorcycles and e-cycles will limit sales advances moving forward. The demand for medium and heavy motorcycles is forecast to advance the slowest of all product types, expanding at a 6.6 percent annual rate through 2016.

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SAMPLE
TEXT

TABLE VI-8

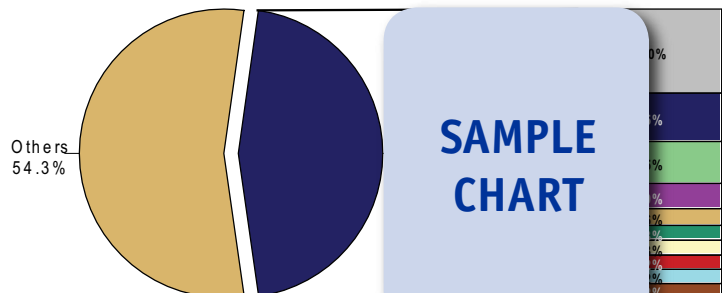
INDONESIA: MOTORCYCLE DEMAND BY TYPE
(thousand units)

Item	2001	2006	2011	2016	2021
Asia/Pacific Motorcycle Demand	22				
% Indonesia					
Indonesia Motorcycle Demand					
Internal Combustion Engine:					
Scooters, Mopeds, & Motorbikes					
Light Motorcycles					
Medium & Heavy Motorcycles					
Electric					
\$/motorcycle					
Indonesia Motorcycle Demand (mil \$)					
% Indonesia					
Asia/Pacific Motorcycle Demand (mil \$)					

SAMPLE
TABLE

CHART VIII-1

WORLD MOTORCYCLE MARKET SHARE
(94.9 million units, 2011)



SAMPLE
CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Eicher Motors Limited

3rd Floor, Select Citywalk

A-3 District Centre

Saket, New Delhi

India

91-11-29080000

http://www.eicher.com

Sales: \$1.5 billion

Employment: 10,000

Key Products: Motorcycles

**SAMPLE
PROFILE**

Eicher Motors Limited, part of the Eicher Group (India) manufactures tractors, motorcycles, and gears. The Company does business through two segments: Two Wheelers and Commercial Vehicles. Eicher Motors' products are marketed worldwide through the Eicher Group's Eicher International Limited subsidiary (India).

The Company competes in the world motorcycle industry through the Two Wheelers segment, which had 2011 sales of \$143 million. The segment does business through the Royal Enfield subsidiary (India), which manufactures cruiser motorcycles with engine displacements of 346 cubic centimeters (cc) and above. Royal Enfield makes motorcycles for the Indian and international markets. Specific products encompass 346-cc BULLET 350 TWINSPARK, THUNDERBIRD TWINSPARK, BULLET ELECTRA TWINSPARK, and CLASSIC 350; and 499-cc BULLET 500, BULLET ELECTRA EFI, CLASSIC 500, CLASSIC BATTLE GREEN, CLASSIC CHROME, CLASSIC DESERT STORM, and BULLET ELECTRA DELUXE cruising motorcycles. In 2011, Royal Enfield sold 74,625 motorcycles. The company has a plant in Chennai, India.

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TABLE VI-7

INDONESIA: MOTORCYCLE SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010\$)					
per capita GDP					
Population (million persons)					
Light Vehicle Demand (000)					
light vehicles/000 persons					
Light Vehicles in Use (mil)					
light vehicles in use/000 persons					
Bicycle Demand (000)					
bicycles/000 persons					
motorcycle demand/000 persons					
motorcycle demand/lt vehicle demand					
motorcycles in use/000 persons					
motorcycles in use/light vehicles in use					
motorcycle demand/bicycle demand					
Motorcycle Demand (000)					
+ net exports & sales from inventory					
Motorcycle Production (000)					
motorcycles in use/demand					
Motorcycles in Use (000 units)					

**SAMPLE
TABLE**

"Motorcycle production in Indonesia will increase 9.3 percent annually to 12.6 million units in 2016, moderating from the 2006-2011 period but outpacing industry output regionwide. Manufacturers will benefit from robust domestic demand and healthy export markets, resulting in additional capacity expansion and industry production. For instance, PT Astra Honda, a joint venture between Honda of Japan and PT Astra International of Indonesia, has announced plans to open a 1.1 million unit capacity motorcycle plant in Karawang, West Java by late 2013."
 --Section VI, pg. 180

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OTHER STUDIES

World Tires

World demand for tires is forecast to rise 4.3 percent per year to 2.9 billion units in 2017. Gains will continue to be led by developing countries in the Asia/Pacific region, particularly China and India. Growth in the dominant motor vehicle market will be driven by increases in motor vehicle usage in developing countries. This study analyzes the 2.4 billion unit world tire industry, with supply and demand forecasts for 2017 and 2022 by market, world region, and for 26 countries. The study also evaluates company market share and profiles industry competitors.

#3105January 2014 \$6100

World Motorcycle Components

World demand for motorcycle components, including those for electric bicycles (e-bikes) and motorcycles (e-cycles), will grow 7.5 percent annually to \$119.5 billion in 2017. Engine and drivetrain parts will remain the largest category, while tires will grow the fastest. The Asia/Pacific region will remain the dominant market. This study analyzes the \$83.2 billion world motorcycle component industry, with forecasts for 2017 and 2022 by market, product, world region, and for 20 countries. The study also evaluates company market share and profiles industry participants.

#3061 August 2013 \$5900

Batteries in China

Demand for batteries in China is forecast to increase 13.0 percent annually to 259 billion yuan in 2016. Secondary batteries will outpace primary types, led by the fast-growing rechargeable lithium batteries segment. The primary battery market will remain dominant, supported by the supplantation of zinc-carbon/chloride batteries by alkaline types. This study analyzes the 141 billion yuan battery industry in China, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry participants.

#3030June 2013 \$5300

Electric Motors

US demand for electric motors will increase at an accelerated rate of 4.6 percent annually through 2017 to \$14.4 billion. AC motors will remain the largest segment while hermetic motors will grow the fastest. The heating and cooling equipment market will provide the best growth opportunities. Integral horsepower motors will outpace fractional horsepower types. This study analyzes the \$11.5 billion US electric motors industry, with forecasts for 2017 and 2022 by type and market. The study also evaluates company market share and profiles industry players.

#3007 March 2013 \$4900

Motorcycles in China

Demand for motorcycles in China is projected to increase 5.5 percent per annum through 2016 to 57.7 million units. Electric motorcycles will outpace gas motorcycles, with mopeds the most popular electric model because they are faster than electric bicycles and cost less than scooters. This study analyzes the 44.1 million unit motorcycle industry in China, with forecasts for 2016 and 2021 by product, gas engine displacement, electric battery type, market and geographic region. The study also evaluates company market share and profiles industry participants.

#2988 February 2013 \$5400

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