World Motorcycle Components

Industry Study with Forecasts for 2017 & 2022

Study #3061 | August 2013 | $5900 | 442 pages
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The Asia/Pacific region, which has both the highest motorcycle production and the most motorcycles in use, will continue to dominate worldwide motorcycle component demand through 2017.

World demand to rise 7.5% annually through 2017

The global market for motorcycle components, including those for electric bicycles (e-bikes) and electric motorcycles (e-cycles), is forecast to expand 7.5 percent annually to $119.5 billion in 2017. The Asia/Pacific region, which has both the highest motorcycle production and the most motorcycles in use, will continue to dominate worldwide demand, representing four-fifths of total motorcycle parts demand in 2017.

China to remain the largest market by far

Demand for OEM motorcycle parts is directly related to motorcycle production, whereas aftermarket demand is tied to the motorcycle park. Both output and stock are expected to grow as a result of rising standards of living in developing nations. China will remain the largest national market by far, with India and Indonesia also important due to both of their large populations -- a large portion of which has the means to purchase inexpensive motorcycles -- and the large size of their motorcycle manufacturing industries, which boosts associated component requirements. As wages for low income families rise in emerging economies, motorcycle ownership becomes an affordable and attractive alternative to walking, riding a bicycle, or utilizing mass transit, which triggers strong growth in motorcycle and aftermarket component sales.

Engine, drivetrain parts to remain largest category

Engine and drivetrain parts will remain the largest component product category in dollar terms because they account for the greatest percentage of total parts costs, regardless of the model. Products in this segment, as well as those included in the structural group, derive the vast majority of their sales from OEM applications. This is because almost all of these parts have low replacement rates, as they are designed to last the useful life of a motorcycle. Tires and the products in the electrical and electronic, and other miscellaneous component categories, tend to have higher replacement rates and suppliers rely on aftermarket parts sales for the bulk of their revenue.

Tires to be fastest growing motorcycle component

The fastest growth among major motorcycle component categories will be registered by tires, with the replacement market accounting for more than four-fifths of incremental demand from 2012 to 2017. Sales of electrical and electronic parts will climb at the second fastest rate, supported by growth in the motorcycle stock and rising output of e-bikes and e-cycles, many of which use more expensive batteries than those installed in conventional ICE motorcycles.
India: Motorcycle Component Outlook & Suppliers

Demand for motorcycle components in India is expected to advance 9.3 percent per year to $19.4 billion in 2017, slowing from the double digit annual growth of the previous 10 years but continuing to outpace the Asia/Pacific region in the aggregate. Market gains will be stimulated by increased motorcycle output and expansion in the motorcycle park, attributable to higher machine demand fueled by growth in household formation, personal incomes, and population. However, the availability and affordability of other means of personal transportation -- which include light vehicles like the Tata NANO, mass transit systems, and commercial three wheelers -- will serve to dampen motorcycle and related parts sales moving forward.

In 2002, replacement component expenditures represented the majority of Indian product sales. However, as motorcycle production rose almost 14 percent per annum over the next 10 years, more than double the rate of the motorcycle stock, OEM parts spending made up an increasing share of overall demand, representing 64 percent of the A/P motorcycle total in 2012. Although OEM expenditures are expected to take more market share from aftermarket applications through 2017, the rate of growth will be much slower than the previous five years as the number of motorcycles in use accelerates from the 2007-2012 period and motorcycle output slows.

Due to strong growth in both motorcycle output and the motorcycle park through 2017, most component product categories will post similar growth rates. Engine and drivetrain parts will remain the largest category in value terms, nearly double the demand level for other miscellaneous components, the second largest group. Gains will be supported by the high percentage of total component costs that these parts account for, coupled with rising motorcycle production. Structural components will continue to be the third largest category, with market increases

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Arrow Special Parts SpA
Via Citernese 128/130
06016 San Giustino
Italy
39-75-861-811
http://www.arrow.it

Annual Sales:  $15 million (estimated)
Employment:  150 (estimated)

Key Products:  exhaust systems, foot pegs, and steering dampers

Arrow Special Parts manufactures exhaust systems and other components for motorcycles. The Company is privately held.

The Company’s motorcycle exhaust systems, which are available for original equipment manufacturer and aftermarket applications, include on- and off-road, and scooter types. On-road exhaust systems are sold through numerous product lines, including COMPETITION, GP2, PRO-RACE, ROUND-SIL, STREET THUNDER, TROPHY, WORKS, and X-KONE. For example, COMPETITION exhaust systems are based on racing motorcycle exhaust systems and include full titanium versions and systems with stainless steel headers. Among Arrow Special Parts’ off-road exhaust systems are ALL-ROAD 2T products, which are intended for two-stroke motorcycles and are constructed from reduced thickness metal sheets. For scooters, the Company makes EXTREME, LIMITED SERIES, MAXI SCOOTER, REFLEX, and STREET exhaust systems. Other motorcycle components from the Company include foot pegs and steering dampers.

Arrow Special Parts conducts manufacturing activities in San Giustino, Italy. The Company’s products are sold via a network of dealers in Europe; the Asia/Pacific region; the Africa/Mideast region;
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Other Studies

Batteries
US demand for primary and secondary batteries is expected to grow 4.2 percent per year to $17.1 billion in 2017. Lithium batteries will offer the best growth opportunities in both the rechargeable and primary battery segments. Secondary batteries will continue to supplant primary batteries as high-drain electronic devices increase in popularity. This study analyzes the $13.9 billion US battery industry, with forecasts for 2017 and 2022 by product and market. The study also reviews battery technology, evaluates company market share and profiles industry players.

#3075 ............... November 2013 ............... $5300

Recreational Vehicles
The US recreational vehicle (RV) market is forecast to increase 4.8 percent annually to $10.7 billion in 2017. Travel trailers will remain the largest product category, while motor homes and campers and camping trailers will be the fastest growing. The South and West regions will continue to lead sales and account for over three-quarters of all US demand. This study analyzes the $8.5 billion US RV industry, with forecasts for 2017 and 2022 by product and regional market. The study also evaluates company market share and profiles industry players.

#3046 ............... August 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

World Tractors
World demand for tractors will rise 6.8 percent annually through 2016 to $122 billion. Gains in the Asia/Pacific region will be more than twice that of any other region, with China alone claiming nearly one-third of the global total. Agricultural tractors will remain the largest segment, followed by tractors for construction and mining applications. This study analyzes the $88 billion world tractor industry, with forecasts for 2016 and 2021 by market, product, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.

#2984 ............... February 2013 ............... $6300

World Motorcycles
The global market for motorcycles, including electrically-powered machines, will grow 7.2 percent annually to 134.5 million units in 2016. China will remain by far the largest national market, followed by India and Indonesia. Sales of e-bikes and e-cycles will grow roughly in line with internal combustion engine (ICE) motorcycle demand. This study analyzes the 95 million unit world motorcycle industry, with forecasts for 2016 and 2021 by type, world region and for 23 countries. The study also evaluates company market share and profiles industry players.

#2972 ............... January 2013 ............... $6300

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