

# World Motorcycles

Industry Study with Forecasts for 2020 & 2025

Study #3454 | October 2016 | \$6600



Outside of China, motorcycle sales will grow more than seven percent per annum during the 2015-2020 period, supported by three major trends:

- As personal incomes rise in developing nations, more households will be able to afford motorcycles.
- Motorcycle sales will rebound in a number of major markets, including Brazil, Indonesia, Italy, Spain, and Thailand.
- Demand for electric bicycles (e-bikes) and electric motorcycles is forecast to rise 11 percent per annum.

The large Chinese motorcycle market will record sizable losses through the forecast year 2020. Rising motor vehicle demand, the expansion of public transportation networks, and new restrictions on motorcycle use will limit gains in the country.

## Living standards to improve in developing countries

Numerous developing countries in the Asia/Pacific region will register strong product sales gains, including Pakistan, the Philippines, Myanmar, and Indonesia. Demand for motorcycles will increase as living standards improve and affordable models become more widely available. Most households cannot afford automobiles, and bus and rail public transportation systems are underdeveloped, making motorcycles an appealing option.

## Medium & heavy ICE motorcycles to register most rapid gains

The medium and heavy internal combustion engine (ICE) motorcycle segment will register faster gains than other ICE product types through 2020, as new and replacement product sales grow in North America, Western Europe, and other mature markets. In developing nations, the number of wealthy households that can afford medium and heavy models, which are luxury items, is expected to increase sharply because of strong economic growth.

## E-bikes to take share from bicycles

Globally, there will be an increasing use of e-bikes at the expense of bicycles. E-bikes are able to reach higher speeds and require less physical exertion, making them a good fit for older riders. They are also more affordable than motorcycles and in many countries do not require a license or insurance to operate.

## Study coverage

This study analyzes the world motorcycle market. It offers historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for supply and demand, as well as demand by type (ICE, electric), in six regions and 24 major countries. The study also considers key market environment factors, assesses the industry structure, and evaluates company market share.

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Industry study with historical data for 2005,  
2010 & 2015 plus forecasts for 2020 & 2025

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## ASIA/PACIFIC

### India: Supply & Demand

Through 2020, motorcycle production in India is projected to continue at the 2010-2015 pace but demand is expected to grow. While output in domestic motorcycle production in the Asia/Pacific region is projected to increase between 2015 and 2020. India has a large population and is home to over many small and medium-sized enterprises that benefit from international trade. International trade will continue to be a key region. Manufacturing exports and expansion of overseas sales and distribution networks. Hero MotoCorp, for instance, is currently working to expand its international presence to 50 countries by 2020. In FY 2015, the company launched the HERO brand and product range in Colombia, Bangladesh, Nicaragua, Democratic Republic of Congo, Mozambique, Angola, and Ethiopia.

In order to satisfy increasing product demand at home and abroad, Hero MotoCorp is expanding its existing facilities. For example, Honda began operations in Hero MotoCorp is currently working to expand its international presence to 50 countries by 2020. In FY 2015, the company launched the HERO brand and product range in Colombia, Bangladesh, Nicaragua, Democratic Republic of Congo, Mozambique, Angola, and Ethiopia.

Both domestic and foreign manufacturers play an important role in India's motorcycle industry. The leading manufacturer in India is Hero

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### INDIA: MOTORCYCLE SUPPLY & DEMAND

Item	2005	2010	2015	2020	2025
Gross Domestic Product (bil 2014\$)					
per capita GDP					
Population (million persons)					
Light Vehicle Demand (000)					
light vehicle sales/000 persons					
Light Vehicles in Use (mil)					
light vehicles in use/000 persons					
motorcycle demand/000 persons					
motorcycle demand/light vehicle demand					
motorcycles in use/000 persons					
motorcycles in use/light vehicles in use					
Motorcycle Demand (000)					
+ net exports & sales from inventory					
Motorcycle Production (000)					
motorcycles in use/demand					
Motorcycles in Use					

Source: The Freedonia Group

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### THAILAND: MOTORCYCLE DEMAND BY TYPE (thousand units)

Item	2005	2010	2015	2020	2025
Asia/Pacific Motorcycle Demand % Thailand					
Thailand Motorcycle Demand					
Internal Combustion Engine:					
Scooters, Mopeds, & Motorbikes					
Light Motorcycles					
Medium & Heavy Motorcycles					
Electric					
\$/motorcycle					
Thailand Motorcycle Demand (mil \$)					

Source: The Freedonia Group

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

## Related Studies

### Rechargeable (Secondary) Batteries

US demand for rechargeable batteries is forecast to expand 5.3 percent annually through 2020 to \$14.2 billion. Gains will be fueled by continued strong growth in hybrid and electric vehicle production. Rechargeable lithium batteries will see the fastest overall demand gains through 2020 with product sales expanding at double-digit rates. This study presents forecasts (2020, 2025) for demand by product and market. The study also reviews key market environment factors, assesses the industry structure and evaluates company market share.

#3458.....September 2016..... \$4900

### Drones (UAVs)

Demand for unmanned aerial vehicles (UAVs), or drones, in the US is forecast to rise 10 percent yearly through 2020 to \$4.4 billion, and the number of vehicles sold will more than double to 5.5 million. The military market currently accounts for the vast majority of demand in dollar terms, while the consumer market accounts for over 99 percent of all units sold. This study examines the \$2.7 billion drones market, with demand forecasts for 2020 and 2025 by type and by market. The study also details company market share and profiles key players in this fledgling US industry.

#3408.....June 2016..... \$5300

### World Tires

Worldwide demand for tires is projected to increase 4.1 percent annually to 3.0 billion units in 2019. Motor vehicles will remain the dominant tire market, while motorcycles and other applications will grow the fastest. The Asia/Pacific region will remain the largest tire market, with China, India, Indonesia and Thailand among the best opportunities. This study analyzes the 2.5 billion unit world tire industry, with forecasts for 2019 and 2024 by market for six world regions and 25 major countries. The study also evaluates company market share and profiles industry competitors.

#3357.....November 2015..... \$6400

### World Buses

Global demand for buses is projected to advance 5.3 percent annually to 664,000 units in 2018. The Asia/Pacific region will remain the dominant market, while the Africa/Mideast region will grow the fastest. Motor coaches will outpace other types based on increasing private sector use, and on their greater comfort, safety and onboard services. This study analyzes the 512,000 unit global bus market, with forecasts for 2018 and 2023 by product, fuel type, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3232.....March 2015..... \$6300

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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