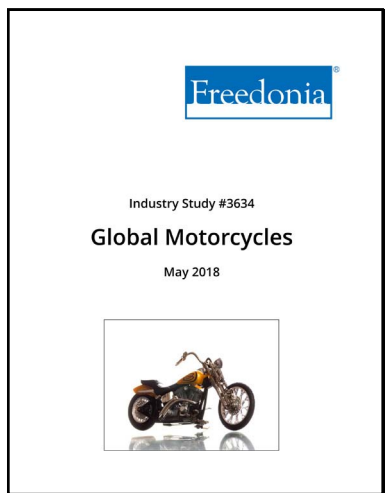




Global Motorcycles

Industry Study #3634 | May 2018



This study reviews the 98-million-unit global motorcycle market. It presents historical motorcycle demand (2007, 2012, 2017) and forecasts for 2022 by product (ICE scooters, mopeds, and motorbikes; ICE light motorcycles; ICE medium and heavy motorcycles; and electric motorcycles) in unit terms. Total motorcycle demand in dollar terms, the number of motorcycles in use and production, and net export figures are provided for selected countries. In addition, the study evaluates company market share and analyzes industry players worldwide including Bajaj Auto, Haojue (Jiangmen Dachangjiang), Hero MotoCorp, Honda, Jiangsu Yadea, Suzuki, TVS Motor, Yamaha, and Zongshen Industrial.

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Table 6-6 | Germany: Motorcycle Demand by Type, 2007 – 2022 (thousand units)

Item	2007
Motorcycles in Use	5840
motorcycles in use/demand	15.8
Motorcycle Demand	370
Internal Combustion Engine:	260
Scooters, Mopeds & Motorbikes	131
Light Motorcycles	14
Medium & Heavy Motorcycles	115
Electric	110
\$/motorcycle	4295
Motorcycle Demand (mil \$)	1590

Key Trends in the Global Motorcycle Market

'17 – '22 CAGR
↑ 4.4%

Key Drivers of Growth:

- ❖ Rising personal incomes in developing nations and the expansion of their road networks
- ❖ Surging e-bike sales in North America, Europe, Japan, and Taiwan
- ❖ The increasing use of motorcycles for recreation and business activities around the world

Motorcycle Demand by Type, 2017 (share of total demand)

- Internal Combustion Engine
- Electric

Leading Industry Players (unit sales)

Bajaj Auto
Haojue (Jiangmen Dachangjiang)
Hero MotoCorp
Honda
Jiangsu Yadea
TVS Motor
Yamaha