



## The PTW Market of Tomorrow

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The Motorcycle Industry in Europe



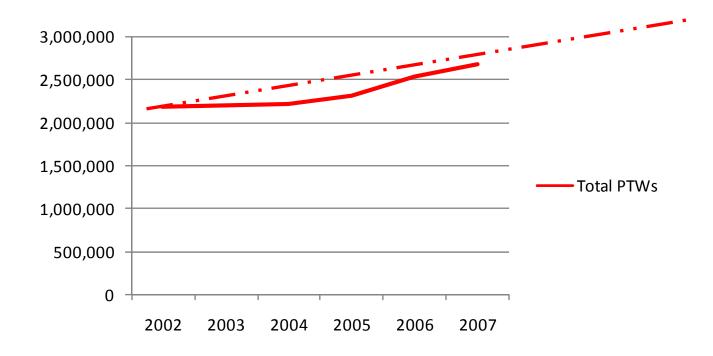
## Europe's Population

- EU: the world's third largest population after China and India
  - 490 Mio inhabitants
  - Urbanization phenomenon
  - By 2020 80% of the population will live in urban areas
- Public transport cannot match all individual mobility and flexibility needs without new vehicule concepts





## **EU PTW Market**

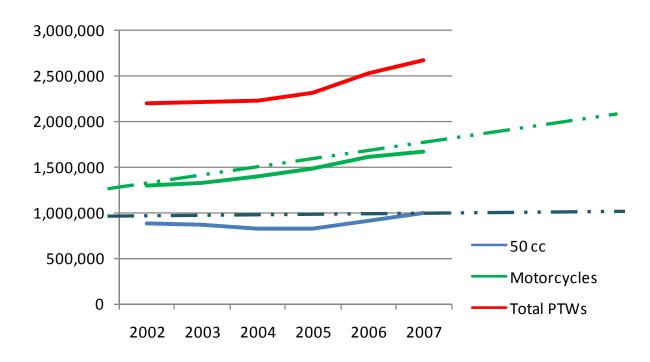


# 6 years of continuous increase pushed by urban mobility needs

- Reaching 2,7 million units at the end of 2007
- 22 % up in 2007 vs 2002



## **Evolution of main Segments**



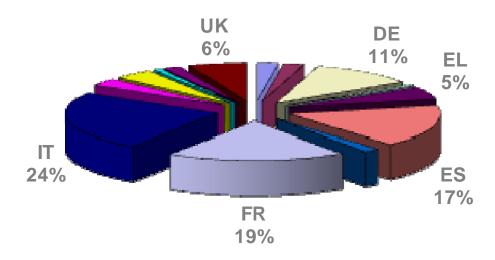
#### **Contrasted trends among PTW categories**

- Mopeds 50 cc: flat trend, reaching 1 million units
- Motorcycles over 50 cc: positive trend, 1,7 million units in 2007



## Countries of PTW "culture"

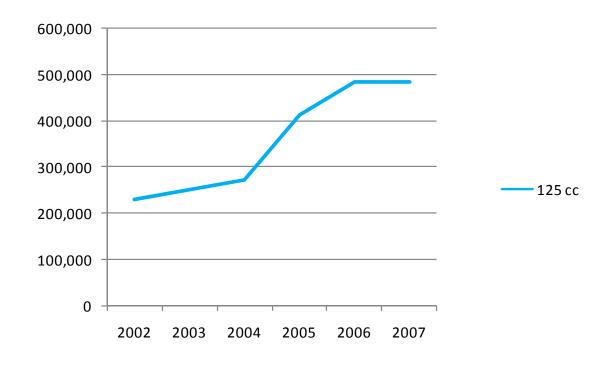
# PTW main countries 2007 (% market share)



Majority of Member States experience market increase 6 countries represent more than 80 % of the EU PTW market



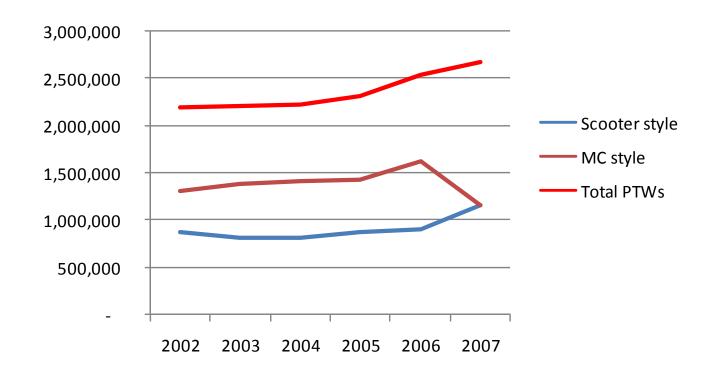
## Focus on the 125cc Segment



Significant increase of 125 cc: + 100 % over the period Increasing congestion and mobility needs boosted the segment



#### Focus on Scooters



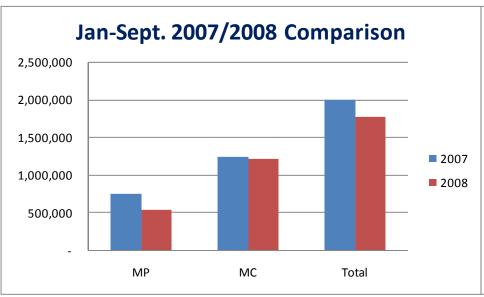
Significant increase of Scooter style: + 33 % over the period

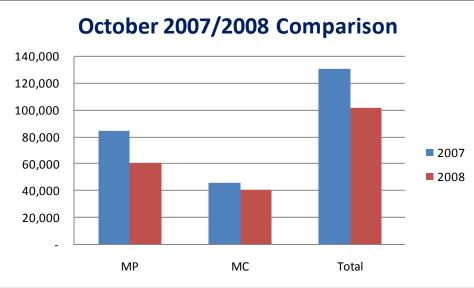
Congestion creates a growing demand of (urban) PTWs





#### Latest Information





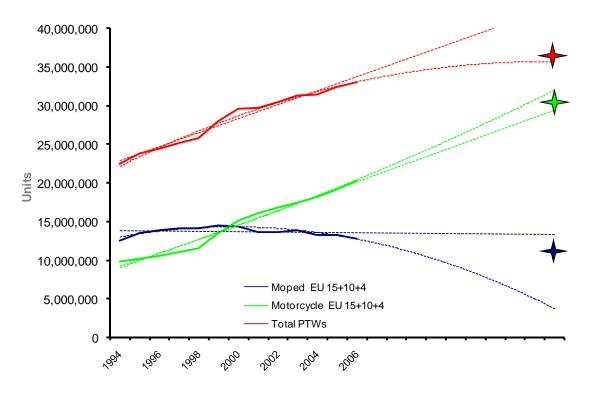
-12% -20%

#### Impact of the crisis?





## Fleet Forecasts – Main Segments



10 years outlook PTWs **37 million units** (+ 12 % vs. 2006)

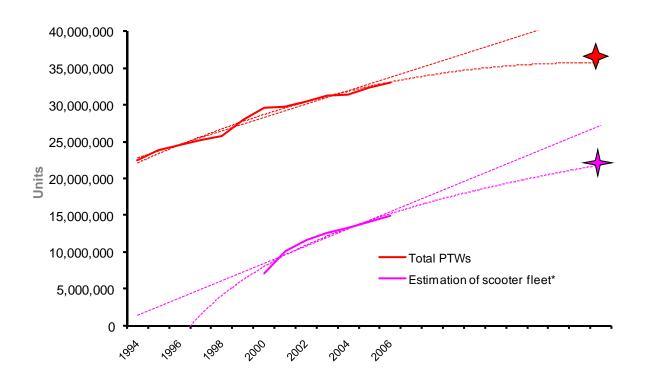
Motorcycles: 26 million units (+29 % vs. 2006)

Mopeds: 11 million units (-14 % vs. 2006)





## Fleet Forecasts - Scooters



10 years outlook scooters: **20 million units** (+43% vs. 2006)



## **EU Market - Main Conclusions**

- Characterized by contrasted trends
  - The history, culture and local conditions
- Was steadily growing over the last 5 years
- Represents a significant potential of growth due to the conjunction of increasing congestion and mobility needs
  - Small to medium capacity growth
  - Scooter style growth
  - Deserved by new alternative technologies
- Challenges and opportunities for the sector